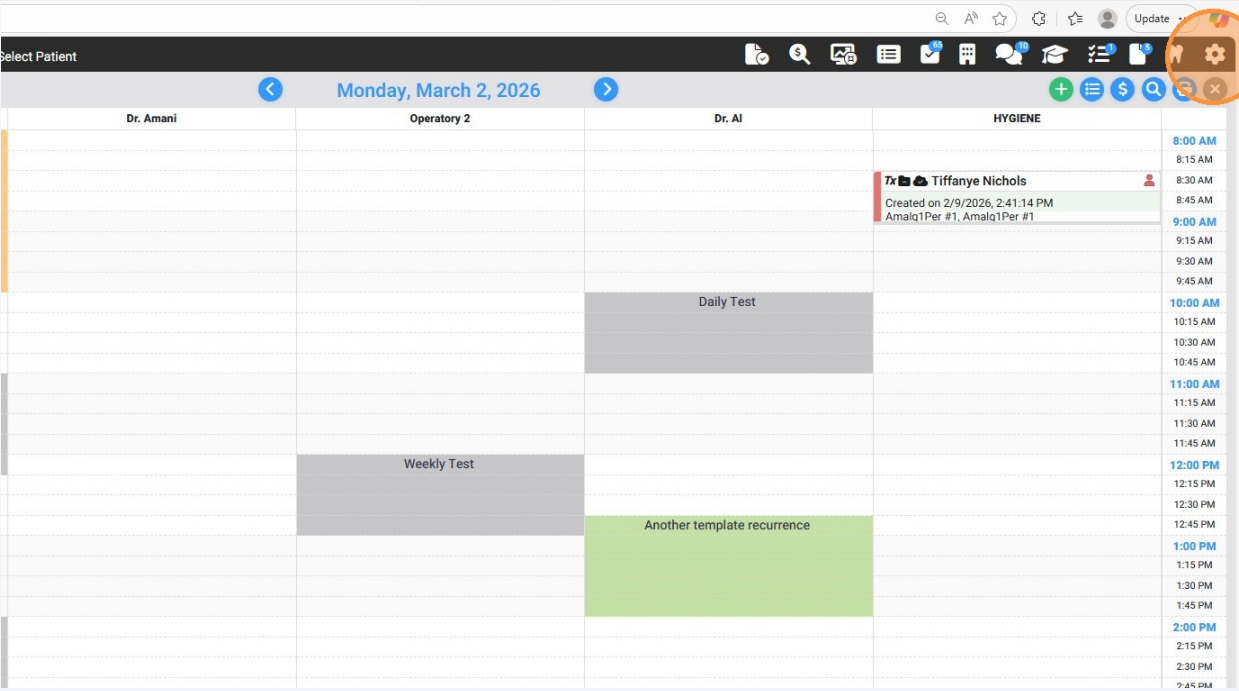


# Configure Online Scheduler and Approve Patient Appointment Requests



## 1 Step 1:

You will need to add Online Scheduler (OLS) to each provider that will be included.  
Enter the practice setup



## 2 Click "Setup"

Select Patient

Monday, March 2, 2026

Dr. Amani Operatory 2 Dr. Al HYGIENE

Practice Setup  
User: Tiffany Nichols  
User Profile Settings  
Logout

7x Tiffany Nichols  
Created on 2/9/2026, 2:41:14 PM  
Amalq1Per #1, Amalq1Per #1

Daily Test

Weekly Test

Another template recurrence

8:30 AM  
8:45 AM  
9:00 AM  
9:15 AM  
9:30 AM  
9:45 AM  
10:00 AM  
10:15 AM  
10:30 AM  
10:45 AM  
11:00 AM  
11:15 AM  
11:30 AM  
11:45 AM  
12:00 PM  
12:15 PM  
12:30 PM  
12:45 PM  
1:00 PM  
1:15 PM  
1:30 PM  
1:45 PM  
2:00 PM  
2:15 PM  
2:30 PM  
2:45 PM  
3:00 PM  
3:15 PM

## 3 Click "Providers"

Flow

Select Patient

< Close Setup

Practice Setup

Practice Information

Practice Information

Set up providers for each doctor and hygienist

Street

1313 Mockingbird Ln

Street 2

Ste 102

City State Postal Code

Chatham IL 62629

Country Phone 1

United States - US (480) 555-5555

Phone 2 Fax

Bank Account

Default Area Code Tooth System

JP

Practice Information

Schedule Settings Data Settings Reports Statement Messages Email Settings Ledger Colors

Practice Information

Users Access

Security

Providers

Schedule Resources

Required Fields

Approve User Requests

Additional Setup

Multicodes

Alert Codes

RX Templates

Appt Templates

Appt Types

Claim Pre-edits

Pt. Acknowledgments

Online Forms

Card Readers

Custom Colors

Patient Communication

Automated Messages

Custom Templates

Additional Settings

SMS Opt-out

Document Center

Patient Portal

Settings

Registration Fields

Custom Page

Accounting Setup

Fee Schedule

Insurance Plans

## 4 Select the provider

Set up providers for each doctor and hygienist

		Last Name	Credentials	Office Number	Fax
ARQ00	David	Arquette	DDS	(480) 969-3688	(480) 215-9874
WC	Will	Call			
HYG02	Janice	Hoops	RDH	(480) 969-3688	(480) 215-9874
SAN00	Juan	Sanchez	DMD	(480) 969-3688	(480) 215-9874
STA00	Kent	Stapley	DMD	(480) 807-4739	
HYG01	Renee	Wilson	RDH	(480) 969-3688	(480) 215-9874

## 5 Click "Show in Online Scheduler (OLS)" in the providers profile

Janice Hoops

Inactive

Last Name: Hoops

Home Phone: (480) 807-4739

Street (Cont): Suite 109

Postal Code: 85206

### Additional Information

Billing Dentist (Box 48-52): Hoops, Janice - HYG02

Bill Claims using another Provider (Box 53-58): Arquette, David - ARQ00

Print in Claim Signature Box: "Signature on File"

Credentials: RDH

Specialty: Dental Hygienist

Appointment Color: Hygiene

Default Resource: Type to search

Facility: Type to search

Show in Online Scheduler (OLS)

### Work Schedule

	Start Time	End Time
Sunday	--:--	--:--
Monday	08:00 AM	05:00 PM
Tuesday	08:00 AM	05:00 PM
Wednesday	08:00 AM	05:00 PM
Thursday	08:00 AM	05:00 PM
Friday	08:00 AM	05:00 PM
Saturday	07:00 AM	04:00 PM

## 6 Click Save Changes

Select Patient

Janice Hoops

Inactive

Last Name  
Hoops

Home Phone  
(480) 807-4739

Street (Cont)  
Suite 109

Postal Code  
85206

Additional Information

Billing Dentist (Box 48-52)  
Hoops, Janice - HYG02

Bill Claims using another Provider (Box 53-58)  
Arquette, David - ARQ00

Print in Claim Signature Box  
Signature on File

Credentials  
RDH

Specialty  
Dental Hygienist

Appointment Color  
Hygiene

Default Resource  
Type to search

Facility  
Type to search

Show in Online Scheduler (OLS)

Work Schedule

	Start Time	End Time
Sunday	--:--	--:--
Monday	08:00 AM	05:00 PM
Tuesday	08:00 AM	05:00 PM
Wednesday	08:00 AM	05:00 PM
Thursday	08:00 AM	05:00 PM
Friday	08:00 AM	05:00 PM

## 7 Step 2

You will need to Set "Appt Types" to be used in OLS

From the Practice Setup menu: select Appt Types

FLOW by multiway

Select Patient

Practice Setup

- Practice Information
- User Access
- Security
- Providers
- Schedule Resources
- Required Fields
- Approve User Requests

Additional Setup

- Multicodes
- Alert Codes
- RX Templates
- Appt Templates
- Appt Types
- Claim Pre-edits
- Pt Acknowledgments
- Online Forms
- Card Readers
- Custom Colors

Patient Communication

- Automated Messages
- Custom Templates
- Additional Settings
- SMS Opt-out
- Document Center

Patient Portal

- Settings
- Registration Fields
- Custom Page

Accounting Setup

- Fee Schedule
- Insurance Plans

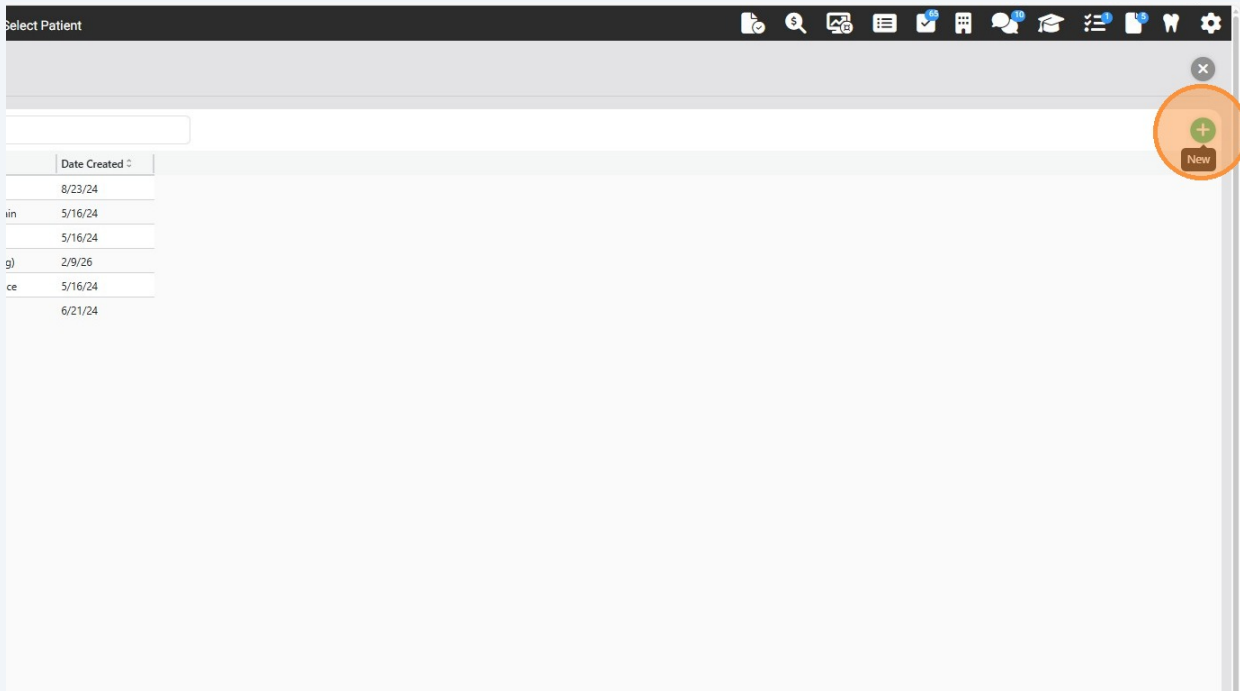
Providers

Search

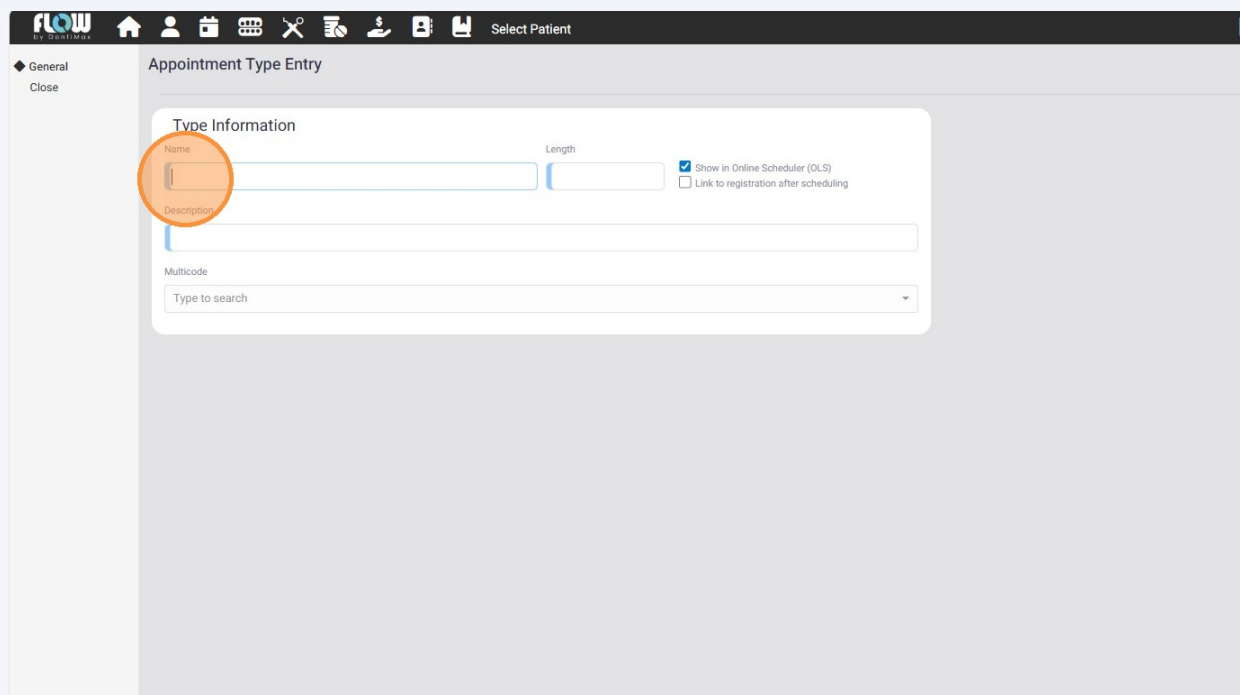
Code	First Name	Last Name	Credentials	Office Number	Fax
ARQ00	David	Arquette	DDS	(480) 969-3688	(480) 215-9874
WC	Will	Call			
HYG02	Janice	Hoops	RDH	(480) 969-3688	(480) 215-9874
SAN00	Juan	Sanchez	DMD	(480) 969-3688	(480) 215-9874
STA00	Kent	Stapley	DMD	(480) 807-4739	
HYG01	Reagan	Wilson	RDH	(480) 969-3688	(480) 215-9874

View and create appointment types

## 8 Click "+" to create a new Appt Type



## 9 Create a Name for the Type



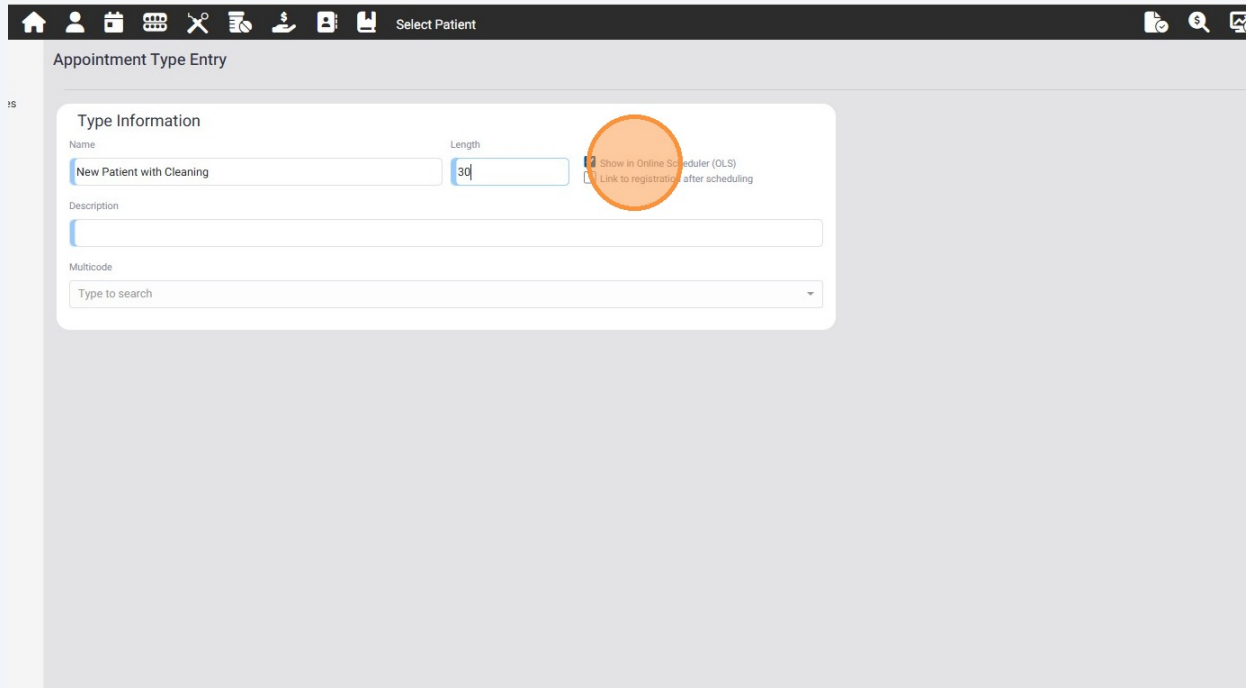
10 You can add a "Length" to the type

The screenshot shows the 'Appointment Type Entry' form in the FLOW by Dentrix software. The form is titled 'Appointment Type Entry' and has a 'General' tab selected. On the left side, there are buttons for 'Save Changes' and 'Cancel Changes'. The main form area contains the following fields and options:

- Name:** A text input field containing 'New Patient with Cleaning'. To its right is a 'Length' field, which is highlighted with an orange circle.
- Description:** A large text input field.
- Multicode:** A dropdown menu with the placeholder text 'Type to search'.
- Options:** Two checkboxes are located to the right of the 'Name' field:
  - Show in Online Scheduler (OLS)
  - Link to registration after scheduling

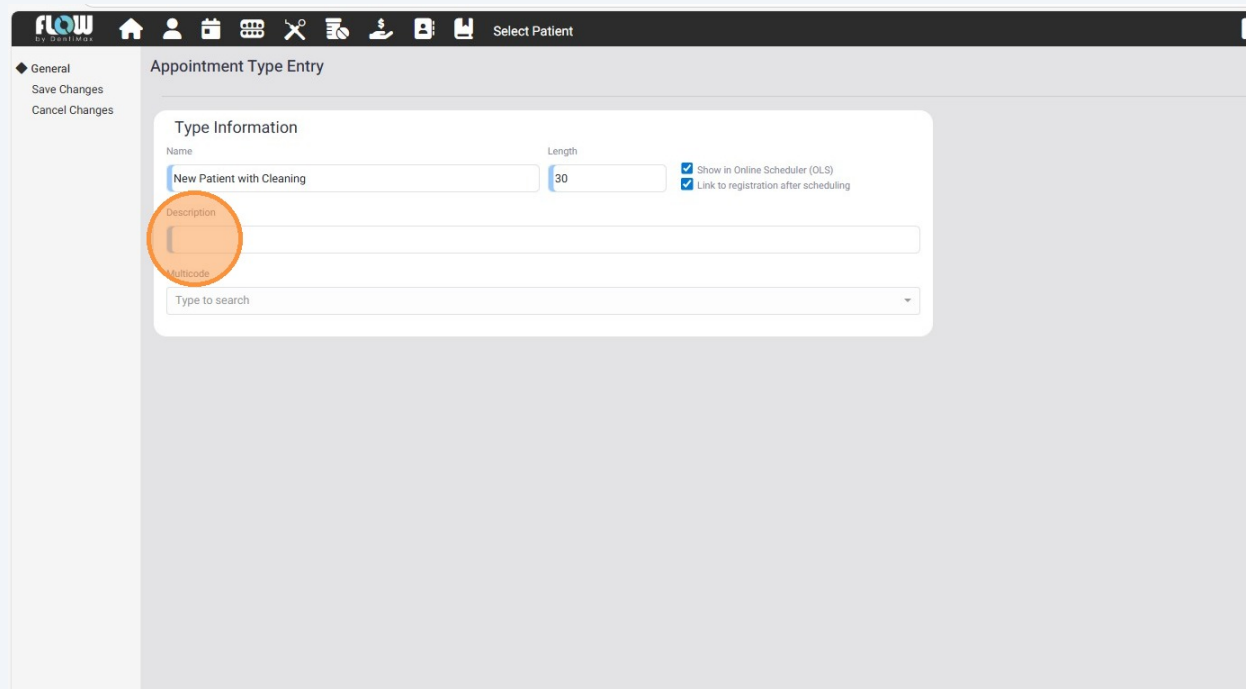
## 11 Be sure to check "Show in OLS"

You can also check the box to Link to online registration after scheduling is you choose to. I would recommend this step to ensure patients get the link to complete their registration in a timely manner.



The screenshot shows the 'Appointment Type Entry' form. The 'Name' field contains 'New Patient with Cleaning' and the 'Length' field contains '30'. The 'Show in Online Scheduler (OLS)' checkbox is checked and highlighted with an orange circle. Below it, the 'Link to registration after scheduling' checkbox is unchecked. The 'Description' field is empty, and the 'Multicode' dropdown menu is set to 'Type to search'.

## 12 Give a Description to the Appt Type



The screenshot shows the 'Appointment Type Entry' form with the 'Description' field highlighted by an orange circle. The 'Name' field contains 'New Patient with Cleaning' and the 'Length' field contains '30'. Both the 'Show in Online Scheduler (OLS)' and 'Link to registration after scheduling' checkboxes are checked. The 'Description' field is empty, and the 'Multicode' dropdown menu is set to 'Type to search'.

13

You can attach a multicode if you would like to attach the procedures to the appointment.

The screenshot shows the 'Appointment Type Entry' form in the FLOW by Dentimax system. The form is titled 'Appointment Type Entry' and is located at the URL <https://flow.dentimax.com/appTypes/create>. The form is divided into several sections: 'General' (with options for 'Save Changes' and 'Cancel Changes'), 'Type Information', and 'Multicode'. The 'Type Information' section includes fields for 'Name' (set to 'New Patient with Cleaning'), 'Length' (set to '30'), and 'Description' (set to 'New Patient Exam with cleaning and xrays'). There are also two checkboxes: 'Show in Online Scheduler (OLS)' and 'Link to registration after scheduling', both of which are checked. The 'Multicode' section is currently empty, with a search box labeled 'Type to search'. An orange circle highlights the search box in the 'Multicode' section.

14

Click "Save Changes"

The screenshot shows the 'Appointment Type Entry' form in the FLOW by Dentimax system. The form is titled 'Appointment Type Entry' and is located at the URL <https://flow.dentimax.com/appTypes/create>. The form is divided into several sections: 'General' (with options for 'Save Changes' and 'Cancel Changes'), 'Type Information', and 'Multicode'. The 'Type Information' section includes fields for 'Name' (set to 'New Patient with Cleaning'), 'Length' (set to '30'), and 'Description' (set to 'New Patient Exam with cleaning and xrays'). There are also two checkboxes: 'Show in Online Scheduler (OLS)' and 'Link to registration after scheduling', both of which are checked. The 'Multicode' section is now populated with the value 'ADULTVIS - Adult CompEx, 48WX, Pano, Prophy Ad'. An orange circle highlights the 'Save Changes' button in the left sidebar.

## 15 Step 3

### Create "Appt Templates"

You have two options to creating these Templates

You can do this directly from the Setup menu

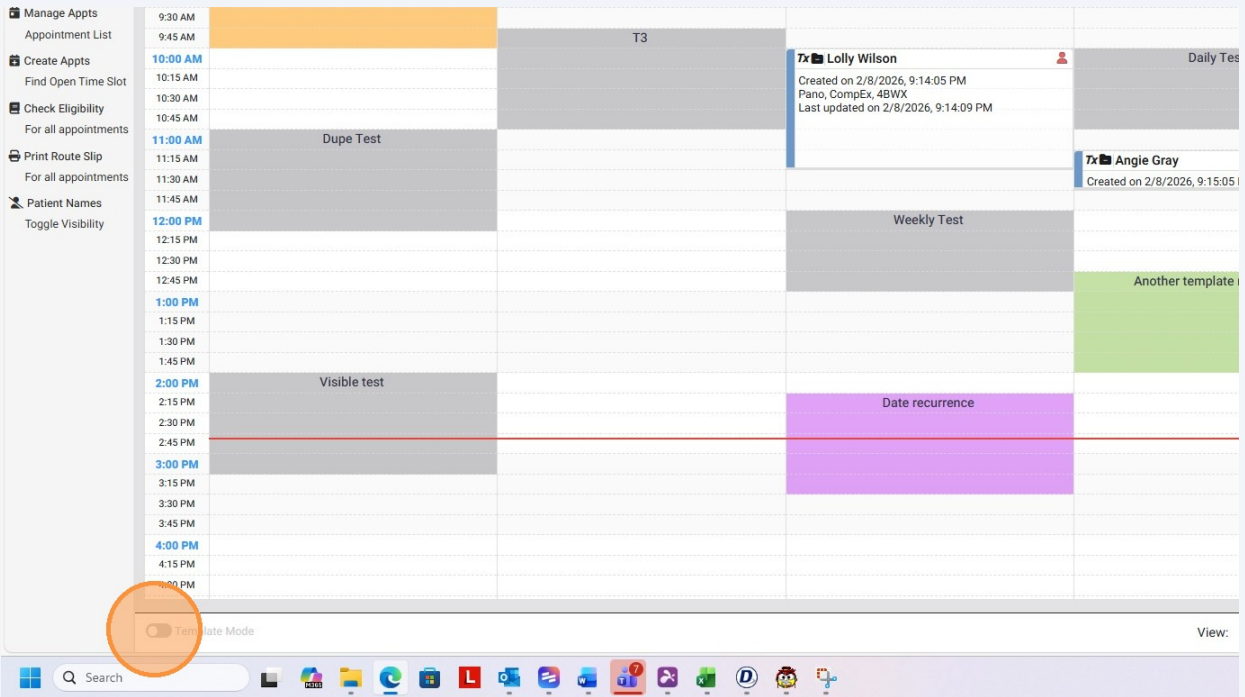
The screenshot shows the FLOW software interface. The top navigation bar includes icons for home, user, calendar, grid, scissors, printer, and a 'Select Patient' button. The left sidebar is titled '<Close Setup' and contains several sections: 'Practice Setup' (Practice Information, User Access, Security, Providers, Schedule Resources, Required Fields, Approve User, Requests), 'Additional Setup' (Multicodes, Alert Codes, RX Templates, Appt Templates, Claim Credits, Pt. Acknowledgments, Online Forms, Card Readers, Custom Colors), 'Patient Communication' (Automated Messages, Custom Templates, Additional Settings, SMS Opt-out, Document Center), 'Patient Portal' (Settings, Registration Fields, Custom Page), and 'Accounting Setup' (Fee Schedule, Insurance Plans). The 'Appt Types' option in the 'Additional Setup' section is highlighted with an orange circle. A tooltip points to this option with the text 'View and create your appointment blocks and scheduler templating'. The main content area is titled 'Appt Types' and features a search bar and a table with columns 'Name', 'Description', and 'Date Created'. The table contains the following data:

Name	Description	Date Created
Test	This is a Test	8/23/24
New Patient with Cle	New Patient Exam with cleaning and xrays	2/9/26
Tooth/Jaw Pain	Patient experiencing tooth and/or jaw pain	5/16/24
Periodic Evaluation	Annual or semi-annual office visit	5/16/24
New Patient Exam	New Patient Full Comp Exam (no cleaning)	2/9/26
	Appointment for patients new to the office	5/16/24
	...ing Appts	6/21/24

16

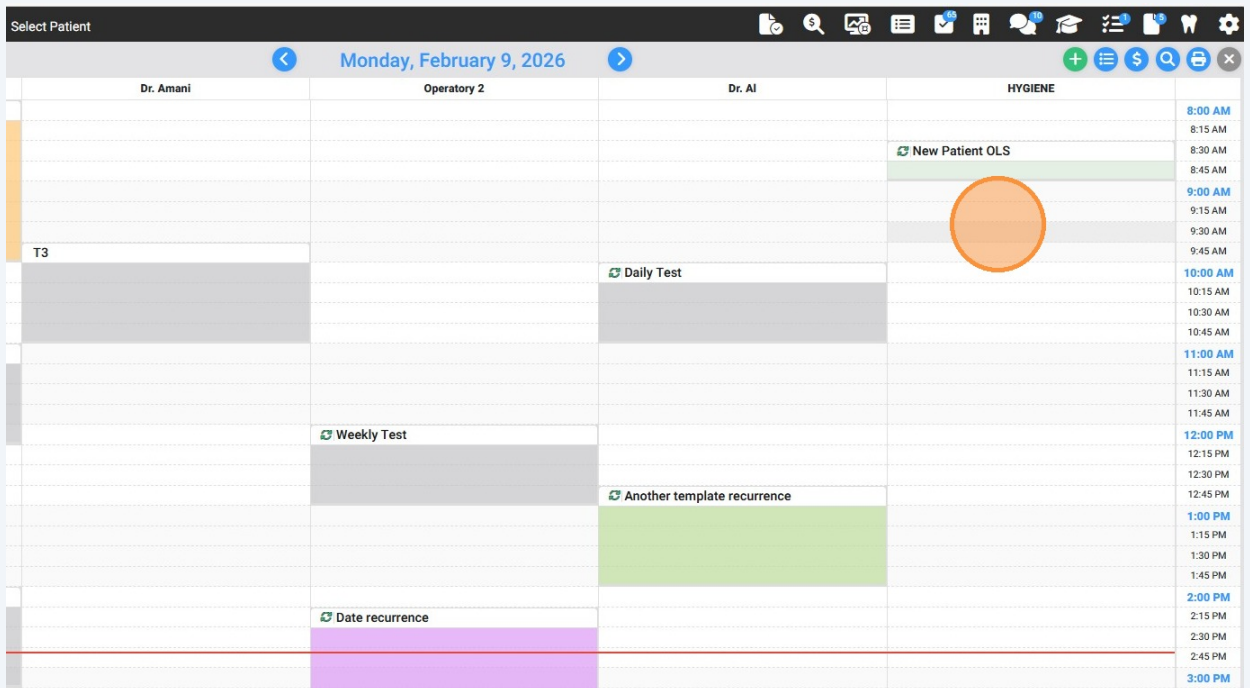
Or you can create the templates from the Scheduler: this is my preference as a visual

You are going to enter Template Mode on the scheduler: in the lower left, click on the slide for Template Mode



17

Select the time slot that you would like to add the template: click



## 18 Enter a Description for the template

The screenshot shows the 'Appointment Template Entry' form. The 'Description' field is highlighted with an orange circle. The form includes the following fields:

- Description:** (highlighted)
- Date:** 02/09/2026
- Time:** 09:30 AM
- Length:** 15
- Resource:** OP003 - HYGIENE
- Provider:** Type to search
- Color:** Medium Gray
- Recurrence:** None

On the right side, there are sections for 'Appointment Restrictions' (Allow only these colors, Allowed Colors) and 'Online Scheduler (OLS)' (Appointment Types).

## 19 Add the Length of Time you would like for the template to be

The screenshot shows the 'Appointment Template Entry' form. The 'Length' field is highlighted with an orange circle. The form includes the following fields:

- Description:** New Patient Exam and Cleaning
- Date:** 02/09/2026
- Time:** 09:30 AM
- Length:** 15 (highlighted)
- Resource:** OP003 - HYGIENE
- Provider:** Type to search
- Color:** Medium Gray
- Recurrence:** None

On the right side, there are sections for 'Appointment Restrictions' (Allow only these colors, Allowed Colors) and 'Online Scheduler (OLS)' (Appointment Types).

20

Select the provider allowed for this template from the drop-down menu

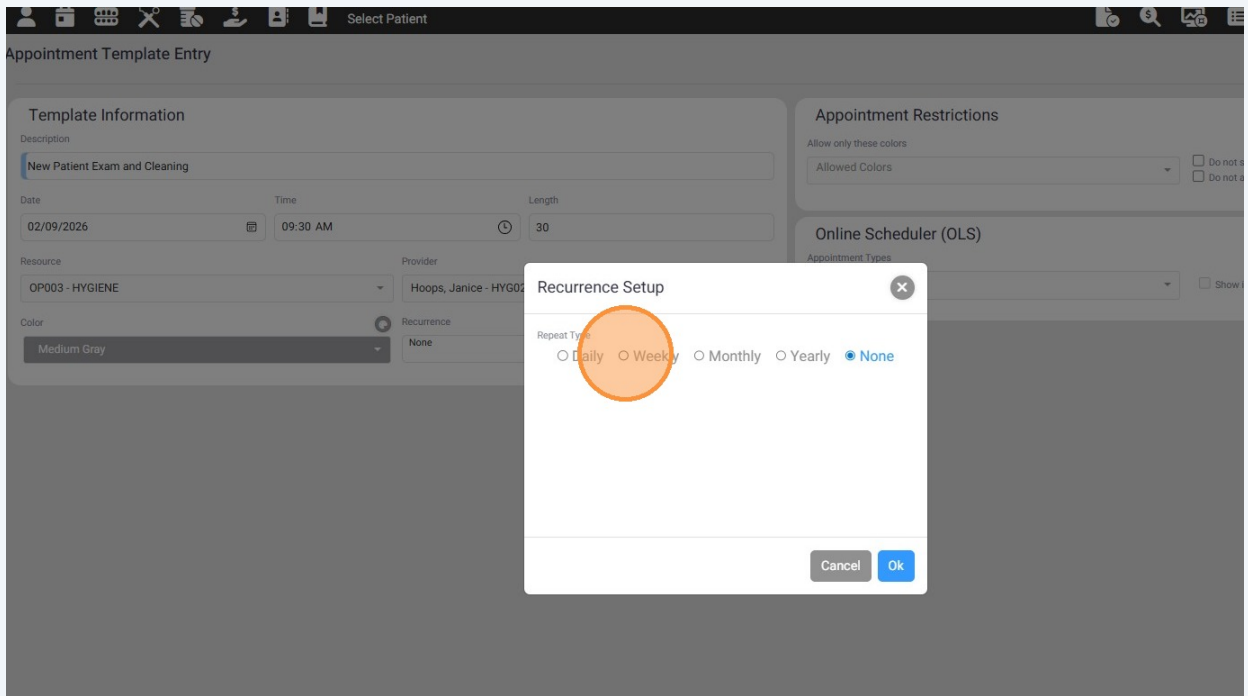
The screenshot shows the 'Appointment Template Entry' form. The 'Template Information' section includes fields for Description ('New Patient Exam and Cleaning'), Date ('02/09/2026'), Time ('09:30 AM'), and Length ('30'). The 'Resource' is set to 'OP003 - HYGIENE' and the 'Color' is 'Medium Gray'. The 'Provider' dropdown menu is open, showing a search bar and a list of providers: Arquette, David - ARQ00; Wilson, Renee - HYG01; Hoops, Janice - HYG02; Sanchez, Juan - SAN00; and Stapley, Kent - STA00. The 'Hoops, Janice - HYG02' option is highlighted with a blue bar and circled in orange. To the right, there are sections for 'Appointment Restrictions' and 'Online Scheduler (OLS)'.

21

Click "Recurrence" if you would like to have this template saved as a regular template: Click on the word "NONE"

The screenshot shows the 'Appointment Template Entry' form with the 'Provider' dropdown menu closed and 'Hoops, Janice - HYG02' selected. The 'Recurrence' dropdown menu is open, showing the word 'None' circled in orange. The 'Template Information' section is the same as in the previous screenshot. The 'Appointment Restrictions' and 'Online Scheduler (OLS)' sections are also visible on the right.

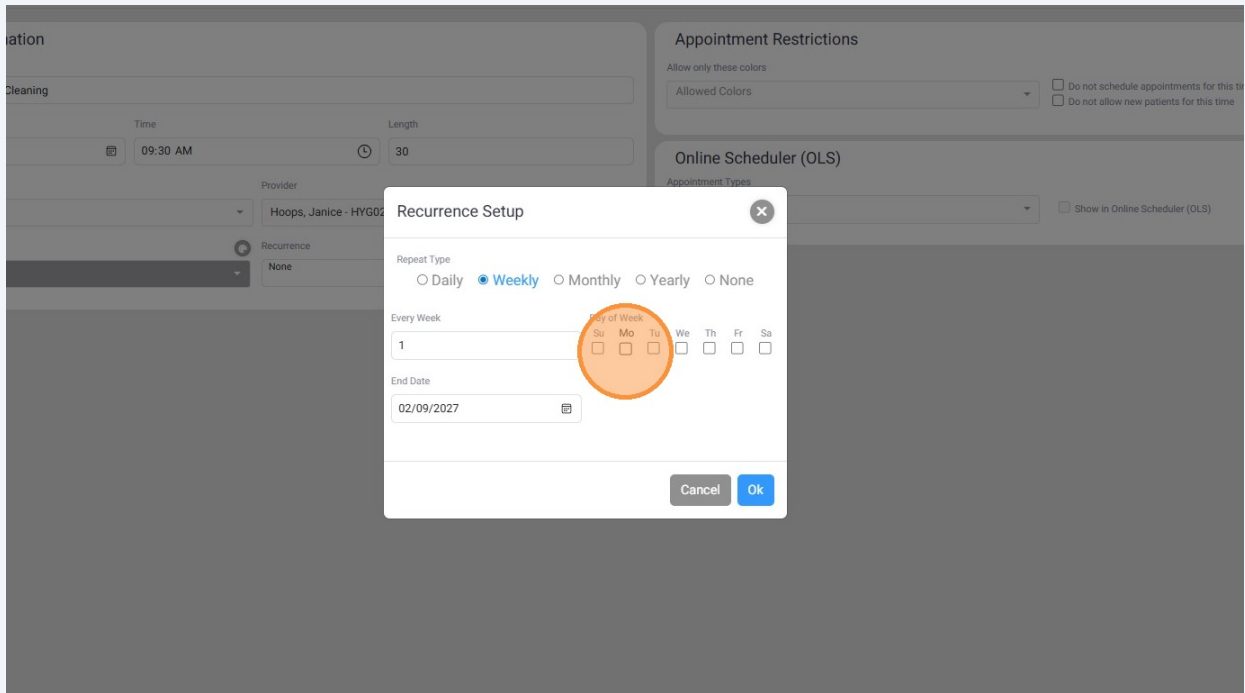
## 22 Select how you would like the recurrence setup



23

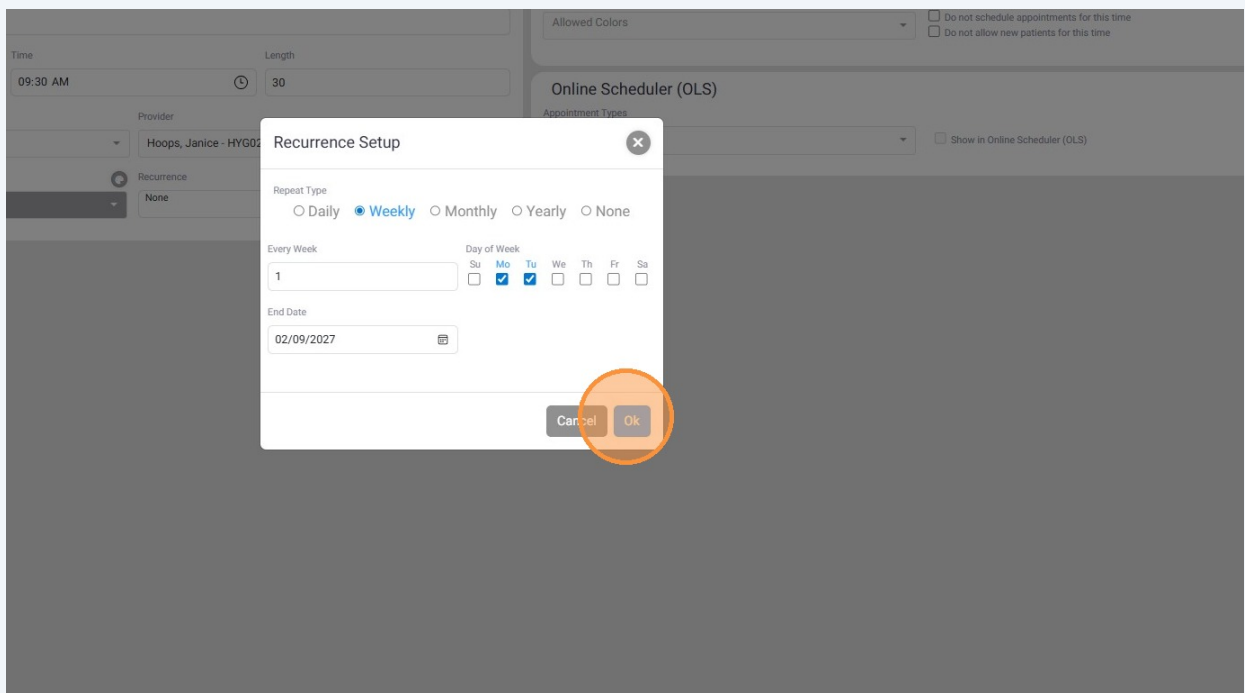
If you choose Weekly; you will then select what days of the week you want this to recur.

Keep in mind that this will put the Template in the same resource (column) each day you select



24

Click "Ok"



25

Now you will need to select the "Appt Type" that is allowed for the Templated spot

Select Patient

Appointment Restrictions

Allow only these colors

Allowed Colors

Do not schedule appointments for this time

Do not allow new patients for this time

Online Scheduler (OLS)

Appointment Types

Test - This is a Test

New Patient with Cle... New Patient Exam with cleaning and xrays

Tooth/Jaw Pain - Patient experiencing tooth and/or jaw pain

Periodic Evaluation - Annual or semi-annual office visit

New Patient Exam - New Patient Full Comp Exam (no cleaning)

New Patient - Appointment for patients new to the office

Hygiene - Cleaning Appts

Show in Online Scheduler (OLS)

26

Be sure the box is checked for "Show in OLS"

Save Changes

Select Patient

Appointment Restrictions

Allow only these colors

Allowed Colors

Do not schedule appointments for this time

Do not allow new patients for this time

Online Scheduler (OLS)

Appointment Types

New Patient with Cle |

Show in Online Scheduler (OLS)

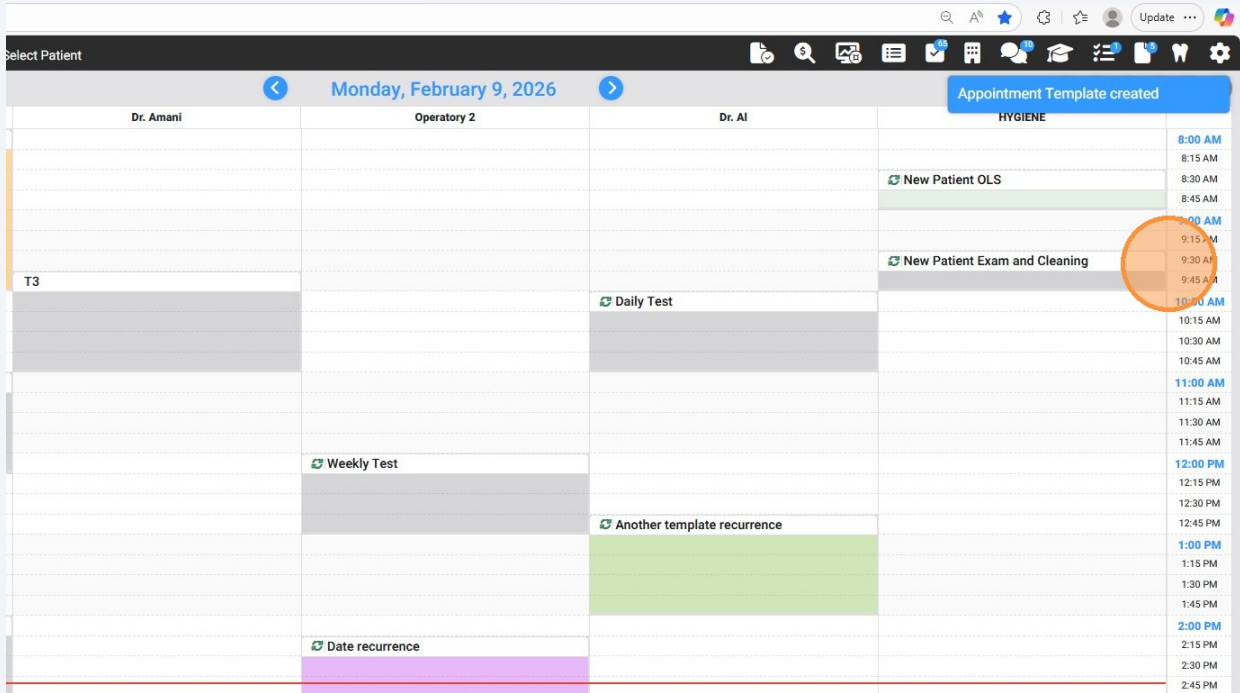
Save

27

You will now see the template on the scheduler.

Repeat this process for any Templates you would like to have included on your OLS options.

Be sure to close Template Mode: click on the slider on the lower left of the scheduler screen when you have created all templates



## 28 Step 4

You will need to Enable the OLS from the Setup menu

The screenshot displays a dental scheduling software interface for Monday, February 9, 2026. The interface is divided into four columns representing different areas: Dr. Amani, Operatory 2, Dr. Al, and HYGIENE. The time slots range from 8:00 AM to 3:15 PM. Various appointment types are visible, including 'New Patient OLS', 'New Patient Exam and Cleaning', 'Daily Test', 'Weekly Test', 'Another template recurrence', and 'Date recurrence'. The 'New Patient OLS' appointment is highlighted in green, and the 'Date recurrence' appointment is highlighted in purple. The 'Daily Test' appointment is highlighted in grey. The 'Weekly Test' appointment is highlighted in grey. The 'Another template recurrence' appointment is highlighted in green. The 'Date recurrence' appointment is highlighted in purple. The 'New Patient Exam and Cleaning' appointment is highlighted in grey. The 'Daily Test' appointment is highlighted in grey. The 'Weekly Test' appointment is highlighted in grey. The 'Another template recurrence' appointment is highlighted in green. The 'Date recurrence' appointment is highlighted in purple. The 'New Patient OLS' appointment is highlighted in green. The 'New Patient Exam and Cleaning' appointment is highlighted in grey. The 'Daily Test' appointment is highlighted in grey. The 'Weekly Test' appointment is highlighted in grey. The 'Another template recurrence' appointment is highlighted in green. The 'Date recurrence' appointment is highlighted in purple.

## 29 Click "Setup"

The screenshot displays the same dental scheduling software interface as in Step 28, but with a 'Setup' menu open. The 'Setup' menu is highlighted, and the user's name 'User: Tiffanie Nichols' is visible. The menu options include 'Practice Setup', 'User Profile Settings', and 'Logout'. The 'Practice Setup' option is highlighted in orange. The 'User Profile Settings' option is highlighted in blue. The 'Logout' option is highlighted in grey. The 'Practice Setup' option is highlighted in orange. The 'User Profile Settings' option is highlighted in blue. The 'Logout' option is highlighted in grey.

### 30 Select Settings from Patient Portal section

Required Fields  
Approve User Requests

Additional Setup

- Multicodes
- Alert Codes
- RX Templates
- Appt Templates
- Appt Types
- Claim Pre-edits
- Pt. Acknowledgments
- Online Forms
- Card Readers
- Custom Colors

Patient Communication

- Automated Messages
- Custom Templates
- Additional Settings
- SMS Opt-out
- Document Center

Patient Portal

- Settings
- Registration Fields
- Custom Page

Accounting Setup

- Fee Schedule
- Insurance Plans
- Default Coverage
- Service Categories
- Service Codes
- Accounting Codes

System Setup

- Connections
- Payment Processing

Street  
1313 Mockingbird Ln

Street 2  
Ste 102

City Chatham State IL Postal Code 62629

Country United States - US Phone 1 (480) 555-5555

Phone 2 Fax

Bank Account

Default Area Code Tooth System JP

Settings for the patient portal

<https://flow.dentimax.com/setup/regConfig>

### 31 In the OLS section; click Enable

Select Patient

Messages Registration Forms

immax.com/p/kiosk/100

Patient Registration Enabled

Number of Insurance Plans per Patient 2

- Show Custom Page
- Show Alert Page

Online Scheduler (OLS) Enabled

- Automatically Approve Appointment Requests

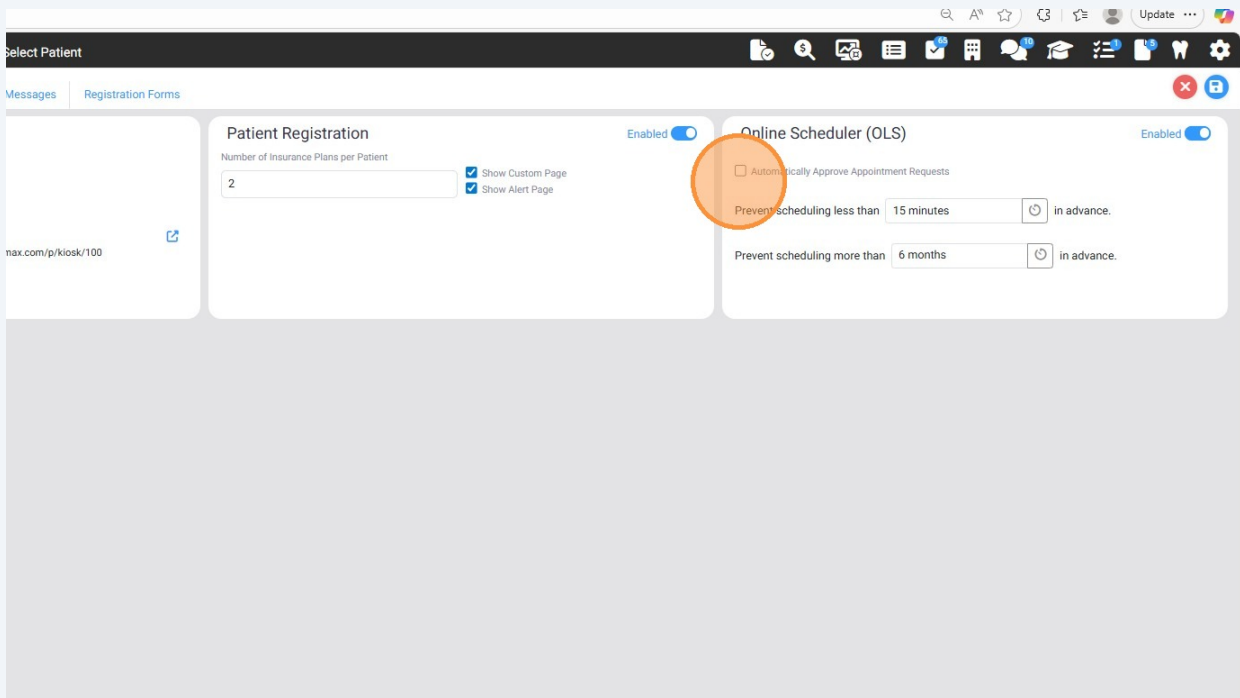
Prevent scheduling less than 15 minutes in advance.

Prevent scheduling more than 6 months in advance.

32

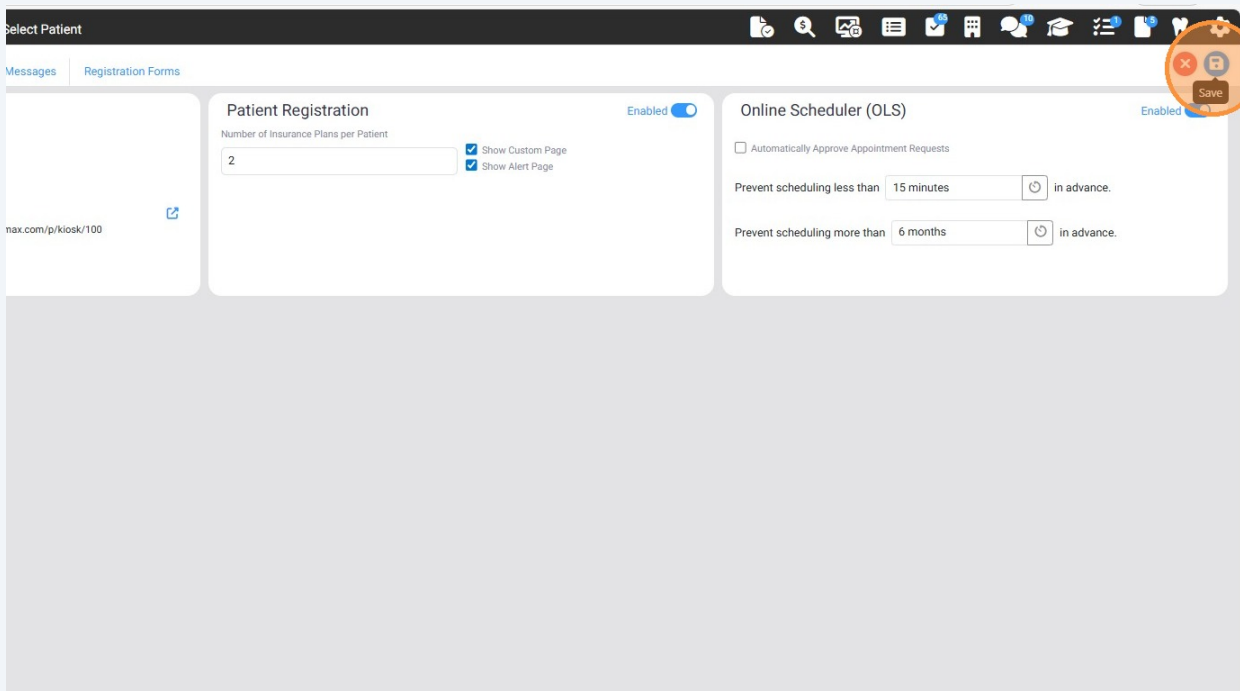
You do have the option to select "Automatically Approve Appointment Request". You will use this if you want the patients to schedule the appointments on the scheduler without prior approval.

If you want to have the option to "Approve" the OLS request; do not check this box



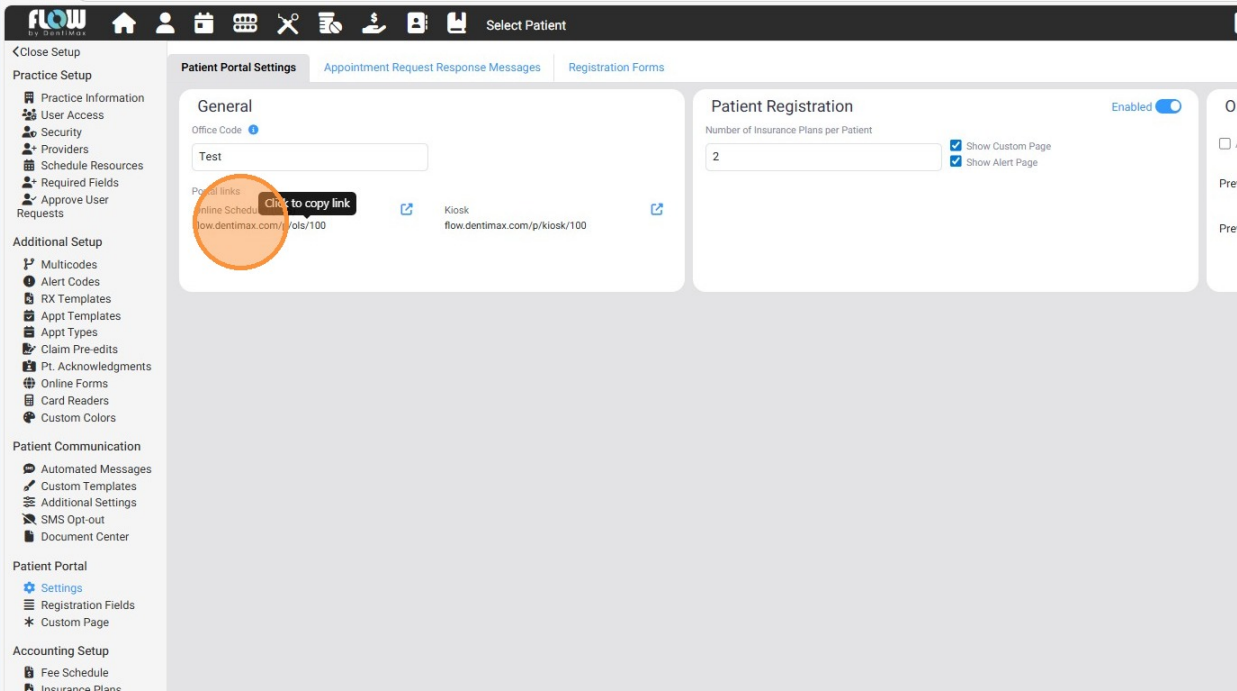
33

Save Changes



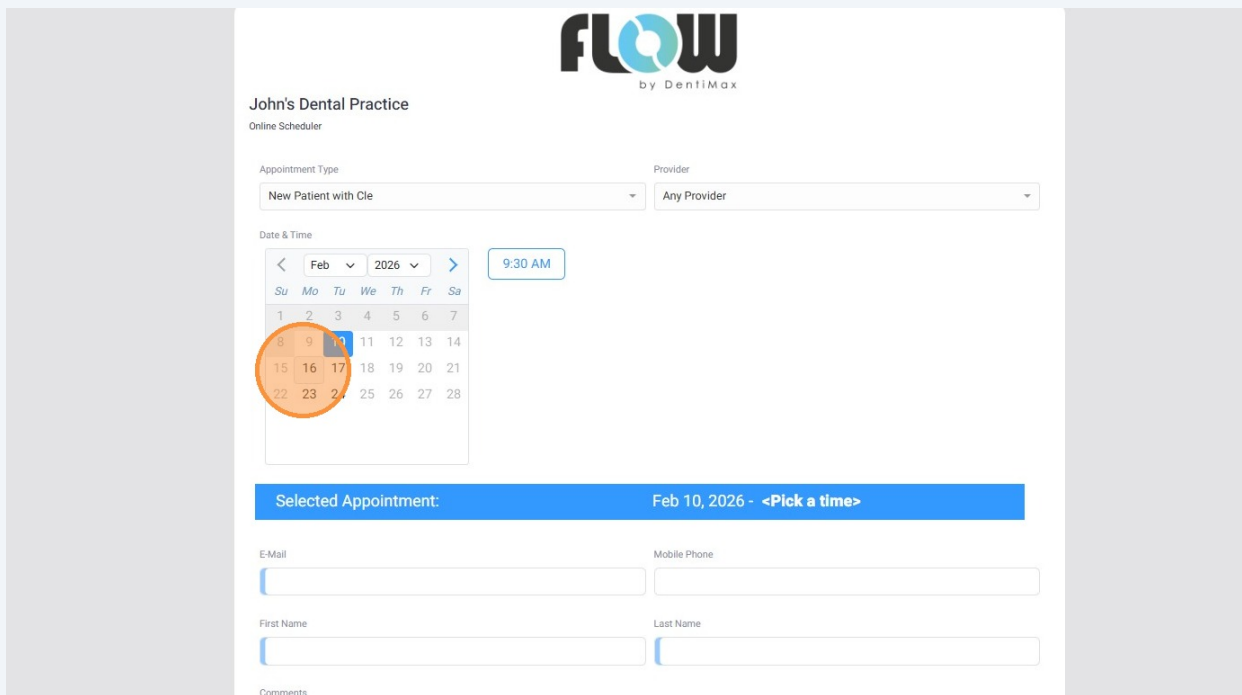
34

This is going to be your link for the OLS. You can provide this to your website manager to use if you want a link on your website.



35

This is a screenshot of what the patient will see



**36** Patients will complete their personal information and click "Request Appointment"

NEW PATIENT WILL USE: [dropdown] My Provider: [dropdown]

Date & Time

< Feb 2026 > 9:30 AM

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Selected Appointment: Feb 24, 2026 - 9:30 AM

E-Mail:  Mobile Phone:

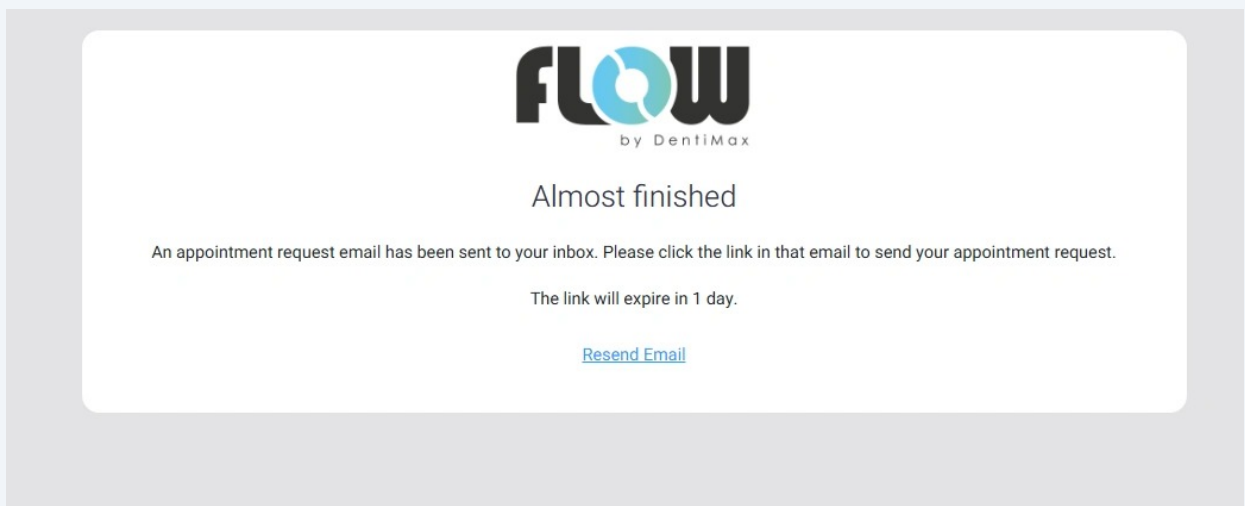
First Name:  Last Name:

Comments:

This patient is new to this office

[Request Appointment](#)

**37** Once the patient submits the request, they will need to go to their email and send the Appointment Request



### 38 This will be the email they receive, they will click on Send Appointment request

Thank you for submitting an appointment request to John's Dental Practice. Once your request has been validated by the office, you will receive another email with the details of your appointment. Please click the button below to send your appointment request.

[Send Appointment Request](#)

You received this email because we received a request for an appointment for your account. If you didn't request an appointment you can safely delete this email.

### 39 Once they click on Send Appointment Request:

If you elected for them to be directed to Online Registration, they will be given the option to continue there directly



Success!

Thank you! Your appointment request has been confirmed and forwarded to the office staff.

[Continue to New Patient Registration](#)

40

They will follow directions to complete all Online Registration

**FLOW**  
by Dentimax

### Personal Information

First Name: Tiff Last Name: Test

Nickname: Birth Date: mm/dd/yyyy

Gender: Marital Status:

SIN/SSN: Language:

### Contact Information

Email: training@dentimax.com Social Media: Facebook

Home Phone: Work Phone: Mobile Phone:

Street: Street (Cont):

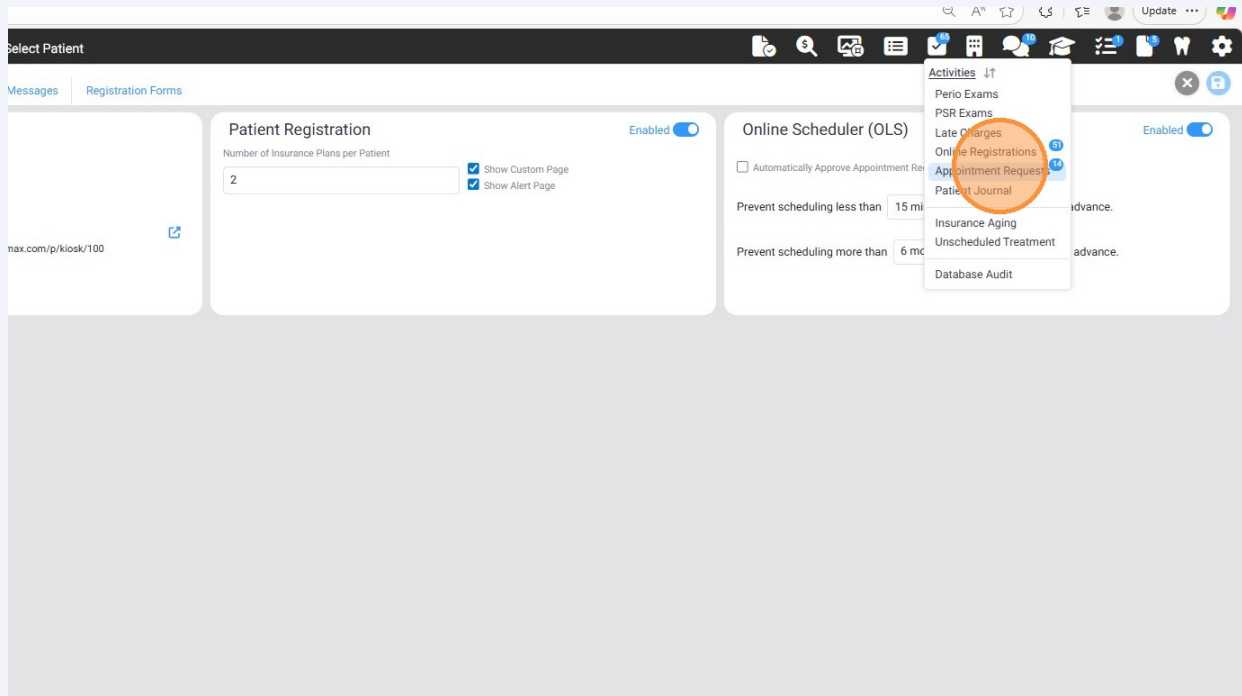
City: State: Postal Code:

Preferred Contact Method: Preferred Scheduling Hours:

## 41 Final Step

You will be notified of pending Appointment Request from your Activities menu: The Blue dot will indicate you have a notification for Online Registrations or Appointment Request

Select Appointment Request



42

The newest request will be listed at the top, ready for approval

Search   Show Approved Appointment Requests

First Name	Last Name	New Patient	Status
Tiff	Test	<input checked="" type="checkbox"/>	Validated
Tyler	Loomis	<input checked="" type="checkbox"/>	Validated
Janice	Smoth	<input checked="" type="checkbox"/>	Pending
Janice	Smith	<input checked="" type="checkbox"/>	Validated
Tyler	Loomis	<input type="checkbox"/>	Rejected
Carson	Jorgensen	<input checked="" type="checkbox"/>	Pending
Carson	Jorgensen	<input checked="" type="checkbox"/>	Pending
Carson	Jorgensen	<input checked="" type="checkbox"/>	Pending
Alicia	Dieujuste	<input type="checkbox"/>	Pending
Magnolia	Research	<input checked="" type="checkbox"/>	Validated
Allee	Goeckeritz	<input checked="" type="checkbox"/>	Validated
Tyler	Loomis	<input checked="" type="checkbox"/>	Validated
BRANDON	Palacio Test	<input checked="" type="checkbox"/>	Pending
BRANDON	PALACIO	<input checked="" type="checkbox"/>	Pending
Alicia	Mckinney	<input checked="" type="checkbox"/>	Validated
Janet	Jones	<input checked="" type="checkbox"/>	Pending
Link	Zelda	<input checked="" type="checkbox"/>	Validated
Link	Zelda	<input checked="" type="checkbox"/>	Pending
Carson	Jorgensen	<input checked="" type="checkbox"/>	Validated
Test	Test	<input checked="" type="checkbox"/>	Pending
Camden	Van Sciver	<input type="checkbox"/>	Validated
Steve	Partner	<input checked="" type="checkbox"/>	Validated

43

Select the desired patient

Search   Show Approved Appointment Requests

First Name	Last Name	New Patient	Status
Tiff	Test	<input checked="" type="checkbox"/>	Validated
Tyler	Loomis	<input checked="" type="checkbox"/>	Validated
Janice	Smoth	<input checked="" type="checkbox"/>	Pending
Janice	Smith	<input checked="" type="checkbox"/>	Validated
Tyler	Loomis	<input type="checkbox"/>	Rejected
Carson	Jorgensen	<input checked="" type="checkbox"/>	Pending
Carson	Jorgensen	<input checked="" type="checkbox"/>	Pending
Carson	Jorgensen	<input checked="" type="checkbox"/>	Pending
Alicia	Dieujuste	<input type="checkbox"/>	Pending
Magnolia	Research	<input checked="" type="checkbox"/>	Validated
Allee	Goeckeritz	<input checked="" type="checkbox"/>	Validated
Tyler	Loomis	<input checked="" type="checkbox"/>	Validated
BRANDON	Palacio Test	<input checked="" type="checkbox"/>	Pending
BRANDON	PALACIO	<input checked="" type="checkbox"/>	Pending
Alicia	Mckinney	<input checked="" type="checkbox"/>	Validated
Janet	Jones	<input checked="" type="checkbox"/>	Pending
Link	Zelda	<input checked="" type="checkbox"/>	Validated
Link	Zelda	<input checked="" type="checkbox"/>	Pending
Carson	Jorgensen	<input checked="" type="checkbox"/>	Validated
Test	Test	<input checked="" type="checkbox"/>	Pending
Camden	Van Sciver	<input type="checkbox"/>	Validated

## 44 Click "View Appointment"

The screenshot shows the 'Appointment Request' interface. On the left, there is a sidebar with options: General, Approve, Reject, and Close. The main content area is titled 'Appointment Request' and contains a 'Details' section. A button labeled 'View Appointment' is circled in orange. The details are as follows:

<b>Patient Name:</b> Tiff Test	<b>Date and Time:</b> 2/24/26, 9:30 AM	<b>Status:</b> Validated
<b>Email:</b> training@dentimax.com	<b>Mobile:</b>	<b>New Patient:</b> Yes
<b>Appointment Type:</b> New Patient with Cle	<b>Provider:</b> HYG02	<b>Appointment:</b> 2/24/26
<b>Created At:</b> 2/9/26, 2:51 PM		

## 45 This will open the actual appointment information, and you can make any additional notes or changes as needed

The screenshot shows the 'Appointment Information' interface. On the left, there is a form for patient information with fields for Last Name (Test), Work Phone, and Mobile Phone. A 'Pending Registration' button is visible. The main content area is titled 'Appointment Information' and contains the following details:

Date	Time	Length
02/24/2026	09:30 AM	30
Appointment Color	Status	Recurrence
[Color]	Unconfirmed	None
Resource	Provider	
OP003 - HYGIENE	Hoops, Janice - HYG02	

Below the appointment information is a 'Notes' section with a text area and a 'Provider Time' button. The text area contains the text 'Normal' and 'Insert notes here ...'. At the bottom, there is a table with the following data:

Description	Tooth	Surface	Fee	Status
comprehensive oral evaluation - new or established patient			\$64.50	Planned
bitewings - four radiographic images			\$48.00	Planned

46

Here we selected an Appointment Color to be added

Select Patient

Pending Registration

Date: 02/24/2026 Time: 09:30 AM Length: 30

Appointment Color: **New Patient** Status: Unconfirmed Recurrence: None

Provider: Hoops, Janice - HYG02

Provider Time: Provider time

Description	Tooth	Surface	Fee	Status
Comprehensive oral evaluation - new or established patient			\$64.50	Planned
Retakings - four radiographic images			\$48.00	Planned
Periapical radiographic images			\$27.00	Planned

47

Save Changes

Select Patient

Pending Registration

Date: 02/24/2026 Time: 09:30 AM Length: 30

Appointment Color: **New Patient** Status: Unconfirmed Recurrence: None

Resource: OP003 - HYGIENE Provider: Hoops, Janice - HYG02

Notes: Normal B I U Helvetica Provider Time: Provider time

Description	Tooth	Surface	Fee	Status
Comprehensive oral evaluation - new or established patient			\$64.50	Planned
Retakings - four radiographic images			\$48.00	Planned

48

If you Approve this appointment, Click "Approve"

The screenshot shows the 'Appointment Request' page in the FLOW system. The left-hand navigation menu has four items: 'General', 'Approve', 'Reject', and 'Close'. The 'Approve' item is highlighted with an orange circle. The main content area displays appointment details for a patient named Tiff Test, including the date and time (2/24/26, 9:30 AM), status (Validated), and appointment type (New Patient with Cle). A 'View Appointment' button is visible at the top of the details section.

49

You will now have the option to send the appointment confirmation detail via Email or Text to the patient

The screenshot shows the 'Send Message' dialog box in the FLOW system. The dialog has two buttons: 'Send Email' (checked) and 'Send Text'. The 'Send Email' button is highlighted with an orange circle. Below the buttons, there is a subject field with the text 'Appointment Request Approved' and a template editor. The template editor contains a pre-filled email message with placeholders for practice name, patient name, date, time, and phone number. The email text is as follows:

Normal

Hello! Thank you for choosing #Practice Name for your dental needs. Your appointment has been scheduled for #Requested Date #Requested Time .

Appointment Details  
Patient Name: #Patient First Name #Patient Last Name  
Date: #Requested Date  
Time: #Requested Time

If you have any questions or concerns, please feel free to contact us at #Practice Phone .

We look forward to meeting you soon!

Sincerely,  
#Practice Name

You received this email because we received a request for an appointment for your account. If you believe you received this email in error, please let us know by responding to this email.

## 50 Click "Approve and Send E-Mail"

Send Email

Request Approved

you for choosing #Practice Name for your dental needs. Your appointment has been scheduled for #Requested Date #Requested Time.

ent Details  
Name: #Patient First Name #Patient Last Name  
#Requested Date  
#Requested Time

ve any questions or concerns, please feel free to contact us at #Practice Phone.

onward to meeting you soon!

! Name

! this email because we received a request for an appointment for your account. If you believe you received this email in error, please let us know by responding to this

Approve without sending

Approve and Send E-Mail

82°F Sunny 2:52 PM 2/9/2026

## 51 You can also use the "Green check mark" to approve the request

Select Patient

Time: 7:30 AM

Status: Validated

New Patient: Yes

Appointment: 2/24/26

Approve

## 52 You can return to your scheduler

**Appointment Request**

**Details** [View Appointment](#)

**Patient Name:** Tiff Test  
**Date and Time:** 2/24/26, 9:30 AM  
**Status:** Validated

**Email:** training@dentimax.com  
**Mobile:**  
**New Patient:** Yes

**Appointment Type:** New Patient with Cle  
**Provider:** HYG02  
**Appointment:** 2/24/26

**Created At:** 2/9/26, 2:51 PM

## 53 You will now see the approved appointment on the scheduler

**Scheduler**

Select Patient

Tuesday, February 24, 2026

Dr. Amani	Operatory 2	Dr. Al	HYGIENE	Time
				8:00 AM
				8:15 AM
				8:30 AM
				8:45 AM
				9:00 AM
				9:15 AM
			Tiff Test Created on 2/9/2026 2:51:13 PM	9:30 AM
		Daily Test		9:45 AM
				10:00 AM
				10:15 AM
				10:30 AM
				10:45 AM
				11:00 AM
				11:15 AM
				11:30 AM
				11:45 AM
				12:00 PM
				12:15 PM
				12:30 PM
				12:45 PM
		Another template recurrence		1:00 PM
				1:15 PM
				1:30 PM
				1:45 PM
				2:00 PM
				2:15 PM
				2:30 PM
				2:45 PM
				3:00 PM
				3:15 PM