

Making Appointments

Introduction

This document is for use by a dental office running Datacon Dental Systems Practice Management software with the Scheduler enabled and in use. This document is written with the System Option “Treatment plans attached to schedule” set.

Questions? Contact the staff at Datacon for help.
www.datacondental.com
Phone: (800) 773-7878
Email: info@datacondental.com

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Making Appointments

When you need to make an appointment, you will encounter a number of different scenarios. You may need to:

- Make an appointment for an existing patient.
- Make an appointment for a new patient.
- Schedule an emergency appointment.
- Schedule multiple coordinating appointments.
- Confirm, reschedule, or cancel an appointment.

In order to accomplish these tasks, you may also need to:

- Search for an appointment.
- Add a new patient to an existing account.
- Add a new patient and a new account.
- Attach planned treatments to an appointment.

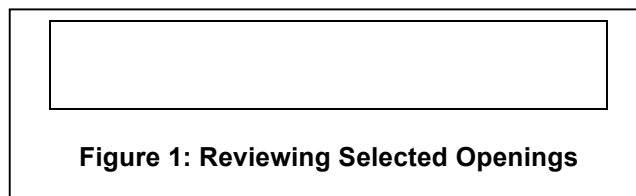
This document will provide instruction on all of these tasks.

Make an Appointment for an Existing Patient

When you make an appointment for an existing patient, first you will locate the patient in your system and then you will make the appointment. This allows you to review the patient during the scheduling process to check if the patient has any other appointments scheduled, or recall that is due, prior to making the new appointment.

- Click and enter the patient's last name, first name.
 - As you type, the name closest to what you've typed so far will display, along with the patient's next appointment.
- Press **return** to go to the list of patients and click to choose the patient. The *Family appointments* screen will open.
 - Review the account information and confirm you have chosen the correct patient.
 - Review the family's appointments to see if anyone else is due or overdue for an appointment.
- Click the patient you want to appoint.
 - If there is already at least one appointment or recall date on file for this patient, the *Patient appointment* screen will open.
 - To appoint an existing recall date, click **Review appointments**, and then click the recall date that you want to work with. Recall dates that are not appointed do not have a time in the **Time** column.
 - To put a recall date on the schedule, and answer Yes to "Do you want to schedule this appointment?" The *Appointment search* screen will open.
 - To add a new appointment from the *Patient appointment* screen, click and answer the question "Do you want to add another appointment for this patient?" The *Select treatment plan for appointment* screen will open.
 - On the *Select treatment plan for appointment* screen, choose the planned treatment for this appointment, or click to add new planned treatment.

- When done selecting treatment for the appointment, click **Continue**. The *Appointment search* screen will open.
- If there is not already an appointment for this patient, answer Yes to the question “No appointment on file. Do you want to add one?” The *Select treatment plan for appointment* screen will open.
 - On the *Select treatment plan for appointment* screen, choose the planned treatment for this appointment, or click **Add** to add new planned treatment.
 - When done selecting treatment for the appointment, click **Continue**. The *Appointment search* screen will open.
- On the *Appointment search* screen, enter your appointment search criteria and then click . A list of days with appointment times that meet your search criteria will display in the box on the right. See the **Search for an Appointment** section below for detailed information.
- Click the appointment that you want. The schedule will open with vertical markers on the first appointment time that matches the search criteria.
- To go directly to the next or previous appointments that match the search criteria, click **Prev** or **Next** for **Date** or **Column**. See Figure 1: Reviewing Selected Openings.



- Click the appointment time where you want to place the appointment. The vertical markers will move to the selected appointment time.
- Click the first unit of the appointment time. The patient’s name will appear on the schedule.
- You are done making an appointment for an existing patient.

Make an Appointment for a New Patient

When you make an appointment for a new patient, first you will find the appointment and then you will add the patient to your system. Use this process either if the new patient will be added to an existing account or if both the patient and account are new and need to be added to your system.

First, find an appointment.

- Click . The *Appointment Search* screen will open.
- On the *Appointment search* screen, enter your appointment search criteria and then click . A list of days with appointment times that meet your search criteria will display in the box on the right. See the **Search for an Appointment** section below for detailed information.
- Click the appointment that you want. The schedule will open with vertical markers on the first appointment time that matches the search criteria.
- To go directly to the next or previous appointments that match the search criteria, click **Prev** or **Next** for **Date** or **Column**. See Figure 1: Reviewing Selected Openings.
- Click the appointment time where you want to place the appointment. The vertical markers will move to the selected appointment time.

Next, add the patient.

Now that you have located the appointment time and your vertical markers are on the correct time, click to add the patient. The *Select the patient to be appointed* screen will open.

- Type last name, first name for the patient and verify that they are not already a patient in your system.
- You can add a new patient to an existing account, or add a new patient to a new account.
 - To add a new patient to an existing account:
 - Click on the *Select the patient to be appointed* screen if necessary to locate the account that you want to add the new patient to. Click the account name to open the account. A list of patients who are already on the account will display.
 - Right-click anywhere on the screen and click **Add**. The *Patient Information* screen will open with a new blank

record. Add the patient information. See the **Add a New Patient to an Existing Account** section below for detailed information.

- When you are done adding the new patient, click . The *Patient Appointment* screen will open.
- Complete **Units, Op,** and **Notes** as needed.
- Click **No scheduled treatments** to add the planned treatments to the appointment. See the **Add Planned Treatments to an Appointment** section below for details.
- You are done making an appointment for a new patient on an existing account.

Notice the line in the notes box that indicates who scheduled the appointment and when. This is system information and cannot be edited or deleted.

○ Or, to add a new patient and a new account:

- Click on the *Select the patient to be appointed* screen.
- Answer Yes to the question “Do you want this patient counted in the new patient statistics?” The *Patient Appointment* screen will open.
 - If you answer Yes, the patient will be counted in New Patient Statistics when charges are posted to the patient.
 - Only answer No if this patient is new to the system but not new to the office.
- Type patient's name **last name, first name**.
 - The account name will default to the patient name.
- Complete **Units, Op,** and **Notes** as needed.
- Click **No scheduled treatments** to add the planned treatments to the appointment. See the **Add Planned Treatments to an Appointment** section below for details.
- Optionally, you can finish entering the patient and account data now.
 - To enter patient data now, click **New patient** on the *Patient appointment* screen and complete the patient information. You can enter as much as necessary and add the rest at a later time.

- To enter account information now, click **New account information** at the top of the new patient information screen. See the **Add a New Account** section below for details.
- You are done making an appointment for a new patient on a new account.

Make an Emergency Appointment

There are two ways to make an emergency appointment: you can look directly at the schedule to find a time for the appointment, or you can search for emergency time production blocking in your schedule if you have your schedule set up that way.

Look Directly at the Schedule

- Click . Today's schedule will open.
- To move to a different time, day, date, book, or producer, click . Enter your criteria at the top of today's schedule, or click again to go to the *Appointment search* screen. See the **Search for an Appointment** section below for detailed information.
- Click the appointment time where you want to put the appointment. The vertical markers will move to that time.
- Click and type in the patient's last name, first name and press **return**. The *Select the patient to be appointed* screen will open.
- Click the patient to appoint. Review the account information to verify that you have chosen the correct patient.
- Click the correct patient to appoint. The *Patient appointment* screen will open.
- Complete **Units**, **Op**, and **Notes** as needed.
- Click **No scheduled treatments** to add the planned treatments to the appointment. See the **Add Planned Treatments to an Appointment** section below for details.
- You are done adding the emergency appointment directly on the schedule.

Search for Emergency Production Blocking

- Follow the instructions for making an appointment for a new or existing patient in this document.
- When entering your search criteria on the *Appointment search* screen, choose your emergency blocking description from the **Production type** drop-down list.
- Complete the appointment just as you would when making an appointment for a new or existing patient.

Schedule Multiple Coordinating Appointments

You can search for and schedule two coordinating appointments at the same time.

- Click and enter the patient's last name, first name.
 - As you type, the name closest to what you've typed so far will display, along with the patient's next appointment.
- Press **return** to go to the list of patients and click to choose the patient. The *Family appointments* screen will open.
 - Review the account information and confirm you have chosen the correct patient.
 - Review the family's appointments to see if anyone else is due for an appointment.
- Click the patient you want to appoint.
 - If there is already at least one appointment or recall date on file for this patient, the *Patient appointment* screen will open.
 - To appoint an existing recall date, click **Review appointments**, and then click the recall date that you want to work with. Recall dates that are not appointed do not have a time in the **Time** column.
 - To put a recall date on the schedule, and answer Yes to "Do you want to schedule this appointment?" The *Appointment search* screen will open.

- To add a new appointment from the *Patient appointment* screen, click and answer the question “Do you want to add another appointment for this patient?” The *Select treatment plan for appointment* screen will open.
 - On the *Select treatment plan for appointment* screen, choose the planned treatment for this appointment, or click to add new planned treatment.
 - When done selecting treatment for the appointment, click . The *Appointment search* screen will open.
- If there is not already an appointment for this patient, answer Yes to the question “No appointment on file. Do you want to add one?” The *Select treatment plan for appointment* screen will open.
 - On the *Select treatment plan for appointment* screen, choose the planned treatment for this appointment, or click to add new planned treatment.
 - When done selecting treatment for the appointment, click . The *Appointment search* screen will open.
- Enter your search criteria for the first appointment as usual on the *Appointment search* screen.
- Click a field on the right side of the screen or press **page down** to move to the search criteria on the right side of the screen. Enter your search criteria for the second appointment. See the **Search for an Appointment** section below for detailed information.
- After entering your search criteria for both appointments, click . A list of days with appointment times that meet your criteria will display in the box on the right.
 - The search result times are for the first appointment.
- Click the appointment that you want. The schedule will open with vertical markers on the first appointment time that matches the search criteria.
- To go directly to the next or previous appointments that match the search criteria, click **Prev** or **Next** for **Date** or **Column**. See Figure 1: Reviewing Selected Openings.

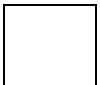
- Click the appointment time where you want to place the appointment. The vertical markers will move to the selected appointment time.
- Click the first unit of the appointment time. The patient's name will appear on the schedule.
- Click . The system will prompt "Do you want to make an appointment in the second time found?" Answer Yes. The schedule will open on the first time that matches the search criteria for the second appointment.
- Click . The system will prompt "Is this appointment for the same patient?"
 - Answer Yes and the *Patient appointment* screen will open for the second appointment.
 - Complete **Units**, **Op**, and **Notes** as needed.
 - Click **No scheduled treatments** to add the planned treatments to the appointment. See the **Add Planned Treatments to an Appointment** section below for details.
 - Answer No if the appointment is for a different member of the family.
 - Choose the patient for the second appointment.
 - Complete **Units**, **Op**, and **Notes** as needed.
 - Click **No scheduled treatments** to add the planned treatments to the appointment. See the **Add Planned Treatments to an Appointment** section below for details.
- You are done scheduling multiple coordinating appointments.

Search for an Appointment

The *Appointment search* screen is where you define your search criteria during the process of making an appointment.

- Make changes for book, column, producer, production type, units, beginning date, or time and weekday preferences to match your search criteria. It is not necessary to change any of these fields if you want to use the default values.

You can quickly access the Appointment Search screen by clicking



To find the first available appointment, enter Units and click Search.

- The **Beginning** field indicates the date the search should begin, defaulting to today. To choose a beginning date other than today:
 - Abbreviate D for days, W for weeks, M for months, or Y for years. For example, 2D specifies to begin the search 2 days from today, 3M specifies to begin 3 months from today, 5W specifies to begin 5 weeks from today, and 1Y specifies to begin 1 year from today.
- The **When** field is for specifying a day of the week and/or time preference. Notice the dots in the **Time & Weekday** table that indicate the selected days and times.
 - Leave **When** blank to accept the default of any weekday or time.
 - Use your mouse to click in the **Time & Weekday** table to select or deselect days and times.
 - To type your preferences in **When**, use these abbreviations:
 - mo, tu, we, th, fr, sa, su, pm, am, after #, before #
 - For example, you could enter:
 - **10-12** to select times between 10:00 and 12:00 every day.
 - **we 10-12** to select times between 10:00 and 12:00 only on Wednesdays.
 - **we fr 10-12** to select times between 10:00 and 12:00 on Wednesdays and Fridays.
 - **am** to select only morning times through 12:00.
 - **pm** to select only afternoon times starting at 12:00.
 - **mo-we** to select all times on Monday through Wednesday.
 - **mo-we 12-4** to select times from 12:00 through 4:00 on Monday through Wednesday.
 - **after 2** to select times after 2:00.
 - **before 2** to select times before 2:00.

- **mo, we, fr** to select all times on Mondays, Wednesdays, and Fridays.
- **Mo tu 3, we 11** to select Mondays and Tuesdays at 3:00, **and** Wednesdays at 11:00.
- To enter search criteria for a second, coordinating, appointment, click a field on the right side of the screen or press **page down** to move to the search criteria on the right side of the screen. Enter your search criteria for the second appointment.
 - The following options are available for the second appointment:
 - Same time as first appt.
 - Any time during first appt.
 - Before or after first appt.
 - Right after first appt.
 - Within 5 min of first appt.
 - Within 10 min of first appt.
 - Within 15 min of first appt.
 - The search result times are for the first appointment.
- After entering your search criteria, click . A list of days with appointment times that meet your search criteria will display in the box on the right.
 - If you have entered search criteria for two appointments, the search results are for the first appointment. See the section **Schedule Multiple Coordinating Appointments** above for more information.

Confirm, Reschedule, or Cancel an Appointment

To confirm, reschedule, or cancel an appointment, follow these steps:

- Click and enter the patient's last name, first name.
 - As you type, the name closest to what you've typed so far will display, along with the patient's next appointment.

- Press **return** to go to the list of patients and click to choose the patient. The *Family appointments* screen will open.
 - Review the account information and confirm you have chosen the correct patient.
- Click the patient whose appointment you want to confirm, reschedule, or cancel. The *Patient appointment* screen will open.
 - The next appointment for this patient will open.
 - To choose a different appointment, click *Review appointments* and click the appointment you want to confirm, reschedule, or cancel.

Confirm the Appointment

Confirmation codes are a system customization. If you don't have them, please call Datacon Support for assistance.

To confirm an appointment, click **Confirm** on the *Patient appointment* screen. A confirmation code drop-down list will appear.

- To indicate a confirmation code, click the down arrow of the drop-down list and click the code you want. The screen will now say **Confirmed**.

- Click if you don't want to assign a confirmation code. The screen will now say **Confirmed**.

- To un-confirm the appointment, click **Confirmed**. Answer No to the question "This appointment was already confirmed. Do you want to update the confirmation?", then answer Yes to the question "Do you want to remove the confirmation?"
- To change the confirmation code, click **Confirmed**. Answer Yes to the question "This appointment was already confirmed. Do you want to update the confirmation?" Then click the down arrow of the drop-down list and click the code you want.

Reschedule the Appointment

To reschedule an appointment, click **Reschedule** on the *Patient appointment* screen. The *Appointment search* screen will open. See the **Search for an Appointment** section below for more information.

- After entering your search criteria, click . A list of days with appointment times that meet your search criteria will display in the box on the right.
- Click the appointment that you want. The schedule will open with vertical markers on the first appointment time that matches the search criteria.

- If you want to move to a different time, click to move the vertical markers to a different time, or to locate another time.
- Once your vertical markers are on the time that you want, click the first unit of the appointment time. The appointment will appear on the schedule and you are done rescheduling the appointment.

Cancel the Appointment

To cancel an appointment, click **Cancel appointment** on the *Patient appointment* screen.

- Answer Yes to the question “Do you want to remove this appointment from the schedule?” The confirmation code drop-down list will appear.
- Choose the code from the list, or click if you don’t want to assign one.
- The appointment is now converted to a recall due date so you can continue to track it for the patient.
 - If you want to delete the recall due date, click **Delete recall** and answer Yes to the question “Are you sure you want to delete this appointment?” This will remove the appointment record from your system.

Add Planned Treatments to an Appointment

Once you have made the appointment and you are on the *Patient appointment* screen, you can add planned treatments to the appointment.

- To attach planned treatment to the appointment from the *Patient appointment* screen, click **No scheduled treatments**. The *Select treatment plan for appointment* screen will open.
 - If the treatment for this appointment is already on a treatment plan, click to highlight each planned treatment then click to return to the *Patient appointment* screen.
 - If the treatment for this appointment is not already on a treatment plan, click . A new treatment plan window will open for this patient.
 - Enter the planned treatments on the Treatment Plan. All new treatments that you add will automatically be

highlighted and included on the patient appointment that you are working with.

- back to the *Select treatment plan for appointment* screen for review. You can see which treatments are highlighted to be included on this appointment. Click to highlight or de-highlight treatments as needed.
- to return to the *Patient appointment* screen.

Add a New Patient to an Existing Account

When you are adding a new patient to an existing account and you have opened a new patient record, enter the patient data as follows.

- Patient name:
 - If the patient is the same person as the Responsible Party, then type RP in the name field. The name will automatically fill in from the Responsible Party record.
 - Or, type the patient name last, first. You can include titles and middle names. For example:
 - Last D.D.S., Dr. First Middle
 - Last DMD, First
 - Last, First Middle
 - The system will automatically capitalize the first letter of each part of the name.
- Chart number: The use of chart numbers is a system option. If you are using chart numbers and they are not automatically set, enter the chart number now. System options for chart numbers include:
 - Include a chart number or not on a new patient.
 - Automatically assign a chart number.
 - If chart numbers are automatically assigned, there is an additional system option to assign the chart number either when the patient is added or when charges are posted.

- When you are adding a new patient, the Chart Number field will behave according to how these options are defined in your system.
- Sex & birthdate:
 - The default sex, male or female, is a system option.
 - Click the drop-down arrow to change the sex.
 - Enter the birthdate in the format mmddyyyy. The system will insert the punctuation and calculate the patient's age for you.
- Answer Yes to the question "Do you want this patient counted in new patient statistics?"
 - If you answer Yes, the patient will be counted in New Patient Statistics when charges are posted to the patient.
 - Only answer No if this patient is new to the system but not new to the office.
- Answer the question "Is this patient insured?"
 - If you answer Yes to "Is this patient insured?" then answer the question "Does this patient have dual coverage?"
 - If you are not sure if the patient is insured, answer Yes so you will be prompted for insurance information when charges are posted to the patient.
- Enter the recall frequency if prompted. Entering recall frequency or not is a system option.
 - Enter the recall frequency in months. For example, "6" for 6 months, "12" for 12 months.
- Answer the question "Do you want the patient on one of the patient lists?"
 - Patient lists are user defined in your system. For example, you could put the patient on a Quick Call list if they want to be called in the event of an appointment opening up sooner.
 - If you answer Yes, click to find the list, then click the list to add the patient to it. The list of patient lists that this patient is on will appear.

If you don't know if the patient is insured, set them up as insured for now. Then the system will prompt you for the insurance information later.

- To add notes to the list entry for this patient, click the list name. The edit notes box will open. Type in your notes then click .
- To add the patient to another list, right-click on the list of lists for the patient, then click .
- When you are done adding the patient to lists, click to return to the *Patient Information* screen.
- Answer the question “Was this patient referred?”
 - If you answer Yes, the *Select a referral source* screen will open.
 - Type the referral source name last, first and press **return**. The list of referral sources will open.
 - Click the referral source that you want or click to add one.
 - Verify you chose the right referral source and answer the question “Is this the one you want?”
 - Answer the question “Any changes?”
 - If you answer Yes, you can make changes to the referral source record. Click when done.
 - Any changes you make here will appear for all patients referred by this referral source.
 - The *Referral Type* window will open. Choose from these referral types:
 - Third party
 - Referral source
 - Patient referred to this person
 - Patient’s doctor
 - Referral source and patient’s doctor
 - Click to select the referral type. The list of referrals for this patient will appear.
 - Click to add another referral source, or when done.

- You are done adding the new patient.

Add a New Account

When you are adding both a new patient and a new account during the appointment scheduling process, you have the option of adding account data after you have added the patient.

- From the *Patient appointment* screen, click **Account**. The *Responsible party name and address* screen will open.
- The patient name that you already entered will default as the responsible party name.
 - If the patient is not the responsible party, change the Responsible Party name here and answer No to “Do you also want to change this name in the patient file?” This sets up the patient and responsible party as two different people.
- Enter the address on the first and second **Address** lines.
- In the **City, state zip** field, type in only the zip code.
 - If the zip code is already on file, the city and state will appear.
 - If the zip code is not already on file, answer Yes to “Zip code not on file. Do you want to add it?”, then enter the city, state.
- Fill in the home and work phone numbers.
 - If the area code is your default area code, press the **space bar** and the default area code will fill in.
 - Fill in numbers only. The system will fill in the punctuation. Use the format XXX XXX XXXX.
 - There are 10 spaces available after the number for extension information.
- Type in the employer name.
- Press **return** for the default doctor name, or click the down arrow to choose a different doctor to own this account.
 - Receivables for this account will belong to the doctor you specify here. This should **not** be changed after transactions have been posted to the account.
- Review the information and answer the question “Any changes?” When you answer No, the *Account information* screen will display.

- Enter any additional information that you want, or click to return to the *Patient appointment* screen.
- You are done adding the new account.