

Processing a Day's Patients

Introduction

This document is for use by a dental office running Datacon Dental Systems Practice Management software with the Scheduler enabled and in use.

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- Post Charges and Payments for Today's Visit.
- Review Appointments for the Patient's Entire Family.
- Signal the Doctor, Assistant, or Hygienist that their Patient is Here.
- Edit the Patient Notes.

Questions? Contact the staff at Datacon for help.
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Who are a Day's Patients?

A day's patients are all of the patients who are on the schedule for the day or who have recall that is due on that day. These patients are listed on the *Appointments and Recall for (Date)* screen.

You can access any day's patients directly from any screen in Datacon by clicking

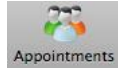


The *Appointments and Recall for (Date)* screen will automatically refresh every 45 seconds to reflect any updates that other users have made that affect the list.

Your Datacon System allows you to fully process each patient directly from the *Appointments and Recall for (Date)* screen. From this screen, you can:

- Search for the list of patients for any date.
- Add a patient to the schedule for the day.
- Remove a patient from the schedule for the day.
- Access the *Patient Appointment* screen.
- Access the *Patient Visit* screen.
- Go to the *Account Information* screen.
- Go to the *Patient Information* screen.
- Review the patient chart or medical history.
- Create or edit a patient's clinical exams. These include perio exams, surgery records, and ortho cases.
- Enter the patient's charting data.
- Review the patient's treatment plan.
- Make the patient's next appointment.
- Post charges and payments.
- Review appointments for the entire family.
- Signal the doctor, assistant, or hygienist that their patient is here.
- Edit the patient notes.

Accessing a Day's Patients



Click **Appointments** from any screen in Datacon to access today's patients. The list of patients with appointments on today's schedule or with recall that is due today will display beginning with patients who have appointment times at the current time or later. Patients with recall due today appear at the top of the list and say "Recall" in the **Time** column. The following options are available on this screen:

- Click **Search** to go to the list of patients for a different date.
- Click **Add** to add a patient to today's schedule.
- Click **Remove** to change or remove an appointment.
- Click **Exit** to go back one screen.
- Click **Restore** to go back to the last saved screen, or the *Main Menu*.
- Press **home** to go to the beginning of the list and display all of the day's patients, including those with appointment times before the current time and those with recall due on this date. Your Selection Rectangle will move to the first entry for the day.
- Press **end** to move your Selection Rectangle to the last entry for the day.
- Press **page down** to move your Selection Rectangle down one page at a time.
- Press **page up** to move your Selection Rectangle up one page at a time.
- Click the **Patient visit** segment control button and then click a patient's name to open the *Patient Visit* screen for the patient.
- Click the **Appointment** segment control button and then click a patient's name to open the *Patient Appointment* screen for the patient.

The Appointments and Recall for (Date)screen will automatically refresh to reflect changes every 45 seconds.

The *Patient Visit* Screen

You can fully process a patient's visit from the *Patient Visit* screen.

The *Patient Visit* screen contains menu items for all of the functions that you may need for processing a patient's visit.

To access the *Patient Visit* screen from your list of patients for a date, click the **Patient visit** segment control button and then click the patient's name. The *Patient Visit* screen will open (see *Figure 1: Patient Visit Screen***Error! Reference source not found.**).

Patient Visit - Amy Janes	
<ul style="list-style-type: none">• Account Info• Patient Info• Patient Chart/Medical History• Clinical Exam• Charting• Treatment Plan• Make Next Appointment• Charges & Payments for Visit• Family Appointments• Patient not here ▾• Patient Note...	
<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;"><p>INS BILLED 2478.00 BAL 1896.00 Insured Aetna US Healthcare MAX 1000.00 Ref Source Ms Joanne Backman</p></div>	

Figure 1: *Patient Visit* Screen

Go to the *Account Information* Screen

To go to the *Account Information* screen from the *Patient Visit* screen, click **Account Info**. The *Account Information* screen for the patient will open.

Go to the *Patient Information* Screen

To go to the *Patient Information* screen from the *Patient Visit* screen, click **Patient Info**. The *Patient Information* screen for the patient will open.

Review the Patient Chart or Medical History

To review the patient's chart or medical history from the *Patient Visit* screen, click **Patient Chart/Medical History**. The Patient Chart for the patient will display.

- The Patient Chart includes all completed treatment, pre-existing treatment done by another office, scheduled treatment, and pending treatment, and watch items.

To list the patient's medical history, click the **Medical history** segment control button. The medical history for the selected patient will display.

- Medical history includes all health history and medical alert items that have been posted for this patient.

To return to the patient's chart, click the **Patient chart** segment control button. The Patient Chart for the patient will display.

Create or Edit a Patient's Clinical Exams

To enter or edit the patient's clinical exam data from the *Patient Visit* screen, click **Clinical Exam**. An arrow indicating a drop-down list will appear. From the list you may choose:

- New tooth chart/exam.
- Today's perio examination (if one exists.)
- New surgery record.
- New ortho case data.
- If the patient has prior exam data, the exams and dates will be available for selection also.

Enter the Patient's Charting Data

To enter or edit the patient's charting data from the *Patient Visit* screen, click **Charting**. The *Diagnosis Record* screen will open with a new Diagnosis Record.

Review the Patient's Treatment Plan


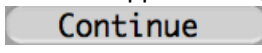
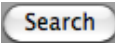


To enter or edit the patient's treatment plan from the *Patient Visit* screen, click **Treatment Plan**. The *Treatment Plan* screen for the patient will open. From the *Treatment Plan* screen you can:

- Review the patient chart/medical history.
- Review the diagnosis records.
- Review insurance estimates and update fees.
- Review all pending treatments.
- Review plans A, B, C, or D, or other plan choices.
- Print a form for predetermination.
- Review financial arrangements.
- Review appointments.

Schedule the Patient's Next Appointment


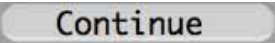


To schedule an appointment or to set up a recall due date from the *Patient Visit* screen, click **Make Next Appointment**. The *Select Treatment Plan for Appointment* screen will open.

To schedule the patient's next appointment:



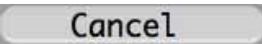
- Designate treatment from the patient's treatment plan to be attached to the new appointment.
 - Click each treatment that you will be doing at the next appointment. The selected treatments will be highlighted.
 - Treatment with a date in the Appointment column is already attached to an appointment and can't be attached to another appointment.
 - If the planned treatment isn't on the list, then it is not on a treatment plan yet. To add treatment to a treatment plan, click . Once the treatment is on a treatment plan, it will be available to attach to the appointment.
 - To de-highlight a treatment, click it again. Dim treatments will not be attached to the appointment.
 - All highlighted treatments will be attached to the appointment.
- When done attaching treatment to the appointment, or if you don't want to attach any treatment, click . The *Appointment Search* screen will open.
- Enter your schedule search criteria and click . Available appointments matching the search criteria will display in the box on the right.
- Click to choose an appointment. The schedule will open on that day and time.
- Click the location on the schedule where you want to place the appointment. The appointment will display on the schedule.
- Click  when you are done placing the appointment on the schedule. The *Patient Appointment* screen will open.
- If no changes are needed, click . The *Patient Visit* screen will open. You are now done making the patient's next appointment.

Prior to scheduling the appointment, create a treatment plan for the patient that includes all planned treatments so the treatments are available to be attached to an appointment. Alternately, you can add treatments to a treatment plan during the process of scheduling the patient's next appointment.

To set up a recall due date, but not an appointment:

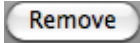
- If the patient's recall frequency is not set, the line at the bottom of the list of treatments on the *Select Treatment Plan for Appointment* screen will say **Patient recall not set**. Click this line and enter the recall frequency, then click . You will return to the *Select Treatment Plan for Appointment* screen and **X month recall** will be highlighted.
- If the patient's recall frequency is already set, click the recall frequency line at the bottom of the *Select Treatment Plan for Appointment* screen. For example, **6 month recall**. The recall frequency line item will be highlighted. The frequency indicates what is defined for this patient.
- Click  to create the recall date. The *Appointment Search* screen will open.
- Click  to set up a recall date but not an appointment. The *Patient Appointment* screen will open with your cursor on the **Date** field.
- If no changes are needed, press **return** in the **Date** field.
- Click  when done. You will return to the *Patient Visit* screen.

Other options on the *Select Treatment Plan for Appointment* screen:

- Click  to exit without creating an appointment or recall date.
- Click  for print options.
- Click  to exit the screen without changing anything.

Post Charges and Payments for Today's Visit

To post charges or payments from the *Patient Visit* screen, click **Charges & Payments for Visit**. The *Charges and Payments for Visit* screen will open.

- Click **Post Charges and Payments** to enter charges OR payments.
- The diagnosis date defaults to today. Change the date if necessary, then press **return**.
 - If you changed the diagnosis date, answer the question "Do you want to make this the posting date for all patients?" A Yes answer will change the default posting date when posting charges or payments for additional patients. Answer Yes if you are posting multiple charges or payments for a date other than today.
 - The diagnosis date must be today, or a date prior to today.
 - The question "Do you want to make this the posting date for all patients?" is a system option.
- Enter the fee slip number if fee slips are in use.
 - The use of fee slip numbers is a system option.
- If a treatment plan exists for this patient, you can post the transactions from it now. If treatment plan transactions were attached to this appointment, the question "Do you want to post the treatment plan from the appointment on this date?" will appear. If there are treatment plan transactions that are not attached to an appointment, the question "would you like to choose from existing treatment plan for this patient?" will appear.
 - Answer Yes if you want to post the treatments from the treatment plan, or No if you do not.
 - Treatment posted from the treatment plan can be changed, and additional treatment can be posted.
 - If you choose to post a treatment plan transaction in error, prior to posting click to highlight the transaction, click , and click Yes to "Do you want to return this item to the treatment plan?" If you click No, answer the question "Do you want to completely delete this transaction?"
 - If you do not post the treatment from the treatment plan, those treatment transactions will still be pending on a treatment plan.


The question to change the default posting date is an option in your system.

The use of fee slips is an option in your system.

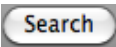
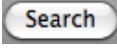

- Edit the treatment plan transactions or enter additional transactions if necessary.
 - Press **return** to choose the production person that is listed, or choose a different one.
 - Press your left or right arrow keys to move forward or backward in the list of producers. Press **return** to choose the producer.
 - Or, click the arrow indicating a drop-down list to choose from the available producers. Click the correct producer.
 - If you choose the incorrect producer and have advanced to the **Code** field, press the up arrow key to return to the **Producer** field.

- Enter or edit the posting code for the procedure, and press




return. If you do not know the correct posting code, click . The *Posting Code Selection* screen will open.

When you are on the Procedure Code Selection screen, click Search then Next to enter part of the code's description for the search.


- Click  to find the posting code you want. When you find the correct code, click it and you will return to the *Enter New Transactions* screen.
- Or, click  then  to enter part of a description for the search.
- To repeat the previous code, type a period (.) or an apostrophe (') in the Code field.
- Enter the tooth number if it is required.
 - The tooth number may be a tooth number, a range of teeth, or a quadrant. For example: 5, 5-10, or UL.
- Enter the surface if it is required.
 - The number of surfaces for a procedure is defined in *Procedure Codes*. You must enter the correct number of surfaces as defined for the code.
 - Surfaces are M, O, D, B, I, L, F, or G. Enter multiple surfaces with no punctuation. For example: MOD.
- Edit the amount if necessary.
 - Amounts that are not your UCR will display in red.


- Post payments or adjustments if desired.
 - Press **return** to choose the production person that is listed, or choose a different one.
 - When you post an adjustment, it will apply to the producer that you specify.
 - When you enter a payment, it will apply to the charge transactions that are posted on the same screen.
 - Payments will appear on the deposit slip for the doctor who owns this account.

If you pay associates based on production/collections, posting payments while posting charges is ideal.

- Enter or edit the posting code for the procedure. If you do not know the correct posting code, click . The *Posting Code Selection* screen will open.

- Type the reference in the Ref: field. This entry will print on the deposit slip. For example, type in the bank's ABA number or the check number. There are 8 characters available for each field.
- If this is a check payment and your System Option to enter check numbers is set, the check number field will appear.
- Type in the payment amount.

- When you are done entering transactions, press . The following options will display:

- **Post these transactions.** This option will post the transactions to the patient's ledger.
- **Review and adjust insurance estimates.** This option will take you to the Insurance Estimate screen for this patient. Make any necessary changes and then click  to return to these options.
- **Leave these transactions to be posted later.** This option will save the transactions you have entered for posting at a later time. Nothing will be posted to the patient's ledger at this time. When you return to the *Post Charges & Payments* screen for this patient, these transactions will be there. Use this option if, for example, you are posting from the back office. The front office staff can later add payments or adjustments and post all of the transactions.

You can review insurance and adjust insurance estimates while posting charges and payments.

- When you choose the option **Leave these transactions to be posted later**, the patient is automatically added to a User Defined List called Posting Pending List.
- **Cancel these transactions.** This option allows you to leave the *Enter New Transactions* screen without changing anything. Treatment plan transactions will remain on the treatment plan and no transactions will be posted to the patient's ledger, nor will they be saved for posting later.
- Finish the patient's visit. Once you have posted the patient's transactions, the second part of the *Patient Visit* screen will open. From here you can:
 - Click **Patient information screen** to go to the *Patient Information* screen.
 - Click **Review patient ledger** to go to the *Patient Ledger* screen.
 - Click **Enter treatment plan** to go to the *Treatment Plan* screen.
 - Click **Schedule next appointment** to go to the *Patient Appointment* screen.
 - Click **Print insurance form** to go to the *Print Form* screen.
 - Click **Payments and adjustments** to go to the *Enter Payments & Adjustments* screen.
 - Click **Print walkout statement** to go to the *Print Walk-out Statement* screen.

Review Appointments for the Patient's Entire Family

To review all appointments for this patient's family from the *Patient Visit* screen, click **Family Appointments**. The *Family Appointments and Recall* screen will open.

- Listings without times are recall due dates.
- Asterisks beside times indicate that the appointment is on the schedule.

Signal the Doctor, Assistant, or Hygienist that their Patient is Here

To check the patient in from the *Patient Visit* screen, click **Patient not here**. An arrow indicating a drop-down list will appear. Click the arrow to choose from the options:

The list of Appointments and Recall for (date) will automatically refresh to reflect changes every 45 seconds.

- Patient not here.
- Patient is here.
- Patient is seated.
- Patient has left.

When the patient is checked in as **Here** or **Seated**, an asterisk beside the patient's name and the time the patient was checked in will automatically appear on the *Appointments and Recall for Today* screen anywhere in the office that the screen is displayed.

Edit the Patient Notes

To edit patient notes from the *Patient Visit* screen, click **Patient Note...** The *Patient Note* window will open. Type your note in the *Patient Note* window.

6 lines of notes will be visible at one time. To view additional notes, press your down arrow key.

6 lines of Patient Notes will be visible at a time

Patient Notes are customizable.

- The patient note can be customized so the information of your choice is automatically displayed. For example, with customized notes you can display information such as:
 - When the patient likes to come in.
 - The patient's last hygiene visit.
 - The date of the patient's last FMX.
 - The account balance.
 - The patient's insurance maximum and remaining benefits for this year.
 - The amount of the account balance currently billed to insurance.
 - The name of the patient's insurance carrier.
 - The patient's recall frequency.
 - The patient's insurance status: private, insured, dual, cap, or Denti-Cal.