Registering a patient

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Overview

How to register a patient

Detailed Instructions

When adding a patient to the system, you have the option to use either the small or the large registration form.

The large registration form, or the 'Patient Registration Form', offers more options than the small one.

The registration form can be accessed from the calendar, a new appointment, the top menu bar, and the main program page. From the top menu bar, click **Register Patient**

The registration form opens. In the top portion, you can fill in as much information on the patient as you wish; however, the only required fields are the first and last name.

This is a great form to use if you are taking the referral from the referring doctor and want to get more specific information on what needs to be done with the patient. You may mark teeth that require treatment, as well as those that need evaluation.

When a tooth is marked as needing treatment, that tooth is automatically added to the patient's chart, and you may enter additional information regarding that tooth on the registration form. Remember, adding a tooth here also adds to the tooth in the patient's chart, assigning the tooth to the doctor listed as the requested doctor on the form.

After filling out this form, if you wish the doctor to review the information, click the **Doctor Review Referral** button. By clicking this box, the patient's referral is added to the daily report of referrals for the doctor to review.

To move between teeth, use the record selector buttons at the bottom.

Once you are done filling in all of the information, click the **Save and Close** or **Open Patient Record**

You may also view the registration forms of existing patients. To do this, select the patient from the top drop-down box.

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