New Patient Appointment

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Overview

How to make a new patient appoitment

Detailed Instructions

1. Open **Calendar**
2. Select day and operatory for appointment. Click, hold and drag mouse to make appointment box.
3. Right click, New Appointment.
4. Appointment form will open with operatory, date and time filled in.
5. Click Add New Patient Small or Large form.
6. Fill out necessary information (name, phone number, referring doctor, email address).
7. Close the form. New patient information will show on the appointment form.
8. Finish filling out appointment form. Required information is tooth number, appointment type and doctor. Optional information includes appointment notes, earlier appointment call list, appointment made by, block additional operatories and medical info tab. Save and close.
9. Open patient record and generate a web id and password.
10. Open **Letters** module and send welcome letter to patient.

Online URL: https://kb.tdo4endo.com/article.php?id=40