**Front Desk Hat**

This outline is to help you with your daily duties as the front desk receptionist. It gives you specifics for your morning, daily and evening duties. Remember you are the face of the office and the representation. When they see you they see the entire office. Below are some guidelines that will assist you with all aspects of your position and serve as a reminder for any and all duties you may have missed. Please follow all the check sheets that will help you throughout the day.



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## **Morning Duties**

* 1. Arrive to work at the following times:
     1. Monday, Wednesday and Thursday at 7 am.
     2. Tuesday at 6 am.
     3. Friday by 7:30 am.
  2. Use Code 3174 to open the door and use the Alarm Code 2456 ENTER to turn off alarm.
  3. Log in to your computer.
     1. CTRL + ALT + DEL and Password is Gums321 *(if desktop screen is not already displayed)*
  4. Log in to DSN
  5. Clock In
     1. Click on the Time Clock tab and use your 3 initials you were given as your log in. Then press “clock in” and “ok” to accept.
  6. Print out daily tasks that are displayed.
     1. Click the Task tab *(looks like a notepad).* Check the box marked “Owner” to print each task by person and then check the box marked “Dates” and select “Due” for the current day. Use the scroll bar and click each name of a person with a task due for the day and print any task that is displayed.
     2. Once printed, put in each person’s communication box located in the communication center.
  7. Take out anything that is in your box. *(Your box must be empty and checked throughout the day for any written communication)*

\*See **Addendum A** for Morning Checklist\*

### **Routine Morning Checks as follows**

* 1. Open front door. Turn on the lights and the lamp. Turn on the coffee machine.
  2. Turn on TV
  3. Fix the front. Make sure there is water in the coffee machine and enough kerug cups in the holder. Restock as needed. Make the lobby look presentable.
  4. Place the sign in sheet on the front counter for patients to sign in.
  5. Go to Dr Sheldon desk.
     1. Clean cup. Fill his cup with water and ice. If there is water still in the cup, please empty it and re-fill with fresh water. *(This does not have to be done on Thursday or Fridays, unless he is working a full schedule.)*
     2. Make sure he has 2 black pens and 1 red pen.
     3. Make sure he has sticky notepads
     4. Any unwanted paperwork you are not sure of, please put in Danyel’s chair.
     5. Clean loops with See Clear. Hang up his loops on wall next to computer.
  6. Turn on the light and water, located in the sterilization room. *(This room is located between room 2 and 3)*
  7. Check the bathrooms
     1. Make sure everything is stocked.
        1. Toilet Paper
        2. Paper towels
        3. Toothbrushes
        4. Pink disposable cups
        5. Tissues
     2. Make sure everything is clean.
        1. Make sure trash cans do not need to be emptied.
        2. Wipe off any smudges and water marks on mirror and faucet.
        3. Wipe down soap dispenser.
  8. Check messages on front desk phone.
     1. Press mailbox
     2. Passcode is 2456
     3. Press messages.
        1. Write the messages clearly with names/numbers and then delete after you have written the information.
        2. Call back any patients who need to be called at 9 am.
        3. Write in the progress notes in patients chart regarding the message you receive.
  9. Begin writing the names of the patients on the next visit slip, indicating and filling out the correct areas.
  10. Review the schedule for the day making sure you are aware who needs to pay and what paperwork needs to be pulled from the accordion.
  11. Be aware on Tuesday mornings staff meeting begins at 6:45 am upstairs, unless otherwise stated. Monday, Wednesday and Thursday staff huddle begins at 7:45 am depending if there is time, located downstairs in the back office. Make sure to ALWAYS display the “We are in staff meeting, please sign in” sign, which is located in second cabinet.

## **Duties Throughout The Day**

### **The day can begin… Remember to**

* 1. Always greet patients with a sincere smile and show interest in them. Offer water or coffee for any patients or those who are waiting with them.
  2. Your goal is to try to remember each patient by name so they do not have to sign in. This makes them feel special and wanted.

### **Procedure Checking In and Out a Patient**

#### **Once a patient arrives, immediately notify.**

* 1. Right click on the appointment and click notify.
  2. Mark on the printed schedule next to your desk that patient is here.
     1. Black marker is more legible, make a slash across the appointment.
     2. When patient is in the room mark the number and then circle. This means that not only is the patient here, but is in the room number you have indicated.
  3. Grab the patients next visit slip and indicate the time he came. Then place the slip next to the schedule. DO NOT PUT IT ON TOP OF THE COUNTER.
  4. Immediately, find the assistant in charge and let them know their patient is here.
     1. If the assistant in charge is not available, immediately find another assistant to either take over the appointment or start the appointment until the assistant appointed is able to take over.
        1. Danyel should be the last assistant you ask to help. Before you ask her to help. Make sure ALL assistants are working on something.
     2. If the room that was supposed to be set up for the patient is not available, find another room we can accommodate them in. We may need to shift patients around, but at least they won’t be sitting and waiting.
        1. Remember our goal: DO NOT LET THE PATIENT WAIT MORE THAN 10 MINUTES.
     3. If you are unsure on your decision, speak with Jennifer first and see if she can help you remedy the situation.
  5. Once the patient has been taken back to a room, un-notify the patient in DSN.

#### **When patient is ready to check out.**

* 1. Check the next visit slip. Make sure the assistant has indicated the next visit with all the details you require. Make sure the patient has a hygiene appointment scheduled. If they don’t offer to schedule. Also check to see if they can be notified of short notice availability.
     1. Make another slash across the patient’s appointment, there should be an X on the appointment. This means the patient has been checked out.
     2. Make sure you have transactions.
        1. If there are no transactions, place a note with the assistant’s initials, name of patient missing transactions and your initials, and place next to the printed schedule on your desk.
     3. Once there are transactions, double check there is a next visit OR place a follow up if you need to.
        1. Placing a Follow Up:
           1. Click Patient
           2. Click the Follow Up Tab
           3. Click Additional Follow-Up
           4. Click Add
           5. Choose the date you would like to follow up
           6. Hit the TYPE scroll box and select the correct follow up
     4. Once everything has been checked. You may green out the patient.
        1. Click the appointment of the patient you want to check out.
        2. Right click and the last option is Check Out.

\*Please see **Addendum B and C** for Checking In and Out patient procedures\*

### **Regarding your Post**

* 1. If you ever need to step away from your desk at any time for any reason please let Jennifer or someone at the front desk know.
     1. DO NOT leave your post for too long unattended. If you are alone upfront, DO NOT leave your post until one of the front staff members comes back.
  2. Any employee who would like coffee will need to pay you $1.00 per cup that they serve themselves. This will accumulate and help Eleanor buy more coffee when we run out.
     1. Put the money you receive in the small blue pouch in the deposit drawer, this doesn’t belong in petty cash.
  3. Any documents you may need will be found under FS1 server. This can be located by clicking the folders icon on the taskbar or by right-clicking on the “Start” icon and selecting “Open Windows Explorer”. You will then scroll to find the FS1 server. Then go to Front Desk. In this folder you will find check sheets, master copies for forms, log in information, and other templates and documents to help you with your position.

### **Routine Daily Check**

* 1. Throughout the day, check the front lobby to make sure it always looks presentable.
     1. Put all the magazines back in the rack and make sure all reading materials are stocked.
     2. Make sure there is enough water in the coffee machine.
     3. Get more water bottles for the fridge if we are running out.
     4. Make sure there are enough coffee cups.
     5. Replenish the Kerug cup racks.
     6. Add any sugar/stevia packets, creamers, and straws if needed.
     7. Clean the coffee area if dirty.
  2. If you are running low on supplies email Eleanor or give her a note as soon as possible so she has enough time to order. DO NOT WAIT UNTIL YOU HAVE NOTHING LEFT.
  3. If you are running low on Half & Half take out $10 from petty cash and give to Rebecca so she can buy it. Again, DO NOT WAIT UNTIL YOU HAVE NOTHING LEFT.

### **Surgery Patients**

* 1. Remember that we send flowers to any patient who has surgery.
     1. Any surgery over $1, 000 we send flowers to those patients.
     2. DO NOT send flowers to any patients who have an uncovering done. *(This is already included in the treatment plan)*
     3. Print out the labels and place them on the flowers sheet. *(Located in the small rolling cabinet)*
     4. Write the date on the upper right hand corner.
     5. Write the patients phone number, scan sheet and email to Devin at dhgores@yahoo.com

### **Hygiene Patients**

* 1. Each hygiene patient must be checked to make sure they have an updated medical history and HIPAA forms.
     1. Check this by clicking the appointment and then attachments.
        1. Review the attachments. For any medical history over a year old the patient must complete and update.
        2. If patient DID NOT sign a HIPAA form, please include these form as well
     2. Make sure the necessary forms that need to be filled out are placed in an envelope with our return address and given to the patient at the time of check out.
     3. Let them know the following: “We were reviewing patients chart and there are some forms we need you to update for us.”
  2. Make sure you review hygiene patients for forms the day before so you are prepared and able to print any necessary documents.

### **Phone Calls Received**

* 1. When you receive a phone call, have a notebook with you or scrap paper at all times to write down any information you may need
     1. Write the name of who is calling and the reason for the call in order to determine if it must be transferred right away OR give a message to the person who needs the message.
     2. Any sales/marketing calls: DO NOT transfer the calls to anyone. Take a message and give a note to whomever they had asked for.
     3. If a doctor calls, get his name and the reason for the call.
        1. If it is in reference to a patient, ask if the patient is in the chair. If he/she is in the chair, you must get Dr Sheldon immediately to take the call.
        2. If the patient is not in the chair, take the doctor’s name, number and the name of the patient to write a note and place it on Dr Sheldon desk. He will call when he is available.
           1. Dr. Lee Sheldon likes his notes written in the special Phone Call notebook so it can be documented. This notebook is located underneath the cubby at your desk
     4. If anyone asks for Dr Sheldon *(Lee or Matt),* take a message and place a note on their desk. They should only be interrupted if it is in reference to a patient.
  2. Any patient who calls: you must document the call in their notes**. Every detail is very important, no matter how big or small. We need notes every single time.** Even if the patient is just rescheduling their appointment, it must be documented.
     1. If the call is in regards to anything pertaining to their treatment or health, this must be documented in Progress Notes.
     2. If the call is just to reschedule an appointment with no relation to their treatment or medical condition, then you will

\*Please see **Addendum D** calls received checklist\*

### **Rescheduling Patients**

* 1. When a patient calls to reschedule, we must indicate in the notes when they were originally schedule and where they moved to. Then write under the comments section, the bar write R/S = 1 *(the number indicates how many times a patient has reschedule).*
     1. If patient doesn’t want to reschedule. Please indicate what the appointment was for and how many units was used for the appointment and place a follow up so we do not lose them.
     2. If a Surgery patient calls to reschedule their appointment. Find out who the Financial Assistant is, then check to see if they are available to speak to the patient. If not get their name and number and let them know that someone will be calling them back.

### **Patients Who Cancels**

* 1. If patient calls to cancel, find out the reason why and try to get them to reschedule.
     1. If a PM patient cancels, try to reschedule them, if they do not, please write in the notes the reason for cancelling and then place a follow up
     2. If a surgery patient wants to cancel, get their name and reiterate the best contact number for them, and let them know someone will be contacting them. Find the assistant who is in charge, and fill out the Treatment of Cancellation form and then write in the notes clearly. Along with the type of surgery and how many units. DO NOT CANCEL it right away wait until you hear back from the assistant in charge.
     3. If an FA patient cancels, write it in the notes and fill out the Treatment of Cancellation form and give it to the appropriate assistant.

\*Please see **Addendum E** pt cancel or rescheduling patient checklist\*

### **Handling Emergency Calls**

* 1. If a patient of record calls on a Monday - Thursday, in pain, they need to come in right away. **DON’T LET THEM WAIT.**
  2. Find out all the details of what is going on, where they are in pain, etc. Contact MVF for surgery and MES for restorative.
  3. If the doctors are on vacation, call the assistant on call for a week with the information and let the patient know the on call assistant will call them back. Make sure you follow up to make sure the assistant called and have written documentation.

*Note: You never leave a message for a doctor to call you and you never leave for the day without this being handled.*

\*Please see **Addendum D** calls received checklist (this includes emergency calls)\*

### **Inactive Patients**

* 1. When an inactive patient calls and wants to make an appointment, we need to schedule them as new patient and charge them the new patient fee.
  2. Check to see if patient has old documents scanned in the attachments
     1. If not then you need to check the terminated patient’s binder, which is located in the cabinets behind the front office.
     2. Find the patients name and give note to Eleanor with patient name and the last date they were seen so she can pull their chart from storage.

## **Closing Duties**

### **Friendly Reminder**

* 1. Once patients are leaving and things start slowing down, this is your opportunity to go back and review.
     1. Make sure all patients have been checked out properly
        1. They each have a transactions and a next visit.
     2. If there is no transaction please find an assistant and remind them of that
     3. Make sure any patient who didn’t have a next visit has a follow up.
     4. Make sure you have all your next visit slips.
     5. Make sure you have written all your notes in any patients chart if necessary
     6. Make sure if there were any messages that they were giving.

### **We empty trash Monday - Thursday**

* 1. Once the last patient has left you must begin emptying the trash.
     1. We empty trash Monday through Wednesday
     2. Empty the trash in the front lobby
     3. The 3 bins at the front desk
     4. The back office.
     5. The back office bathroom.
     6. The large silver bin next to the lab.
     7. The small garbage in the lab

### **Collection/Productions**

* 1. At the end of the day you need to run the numbers for the day and email it to Jennifer and Danyel.
     1. First you need to check and balance all the numbers. You need to add all the credit card slips, checks, and cash and care credit separately.
        1. Credit card slips are separated by Amex, Visa/MasterCard and Discover
        2. Care credit and Springstone will be displayed as Credit card.
        3. Add those numbers up with the amount of checks and cash you have received.
     2. Once those numbers are balanced you need to run the Production numbers.
        1. Go to Reports
        2. Click Print Daily Journal
     3. Email the Collection numbers and Production numbers *(last page of daily journal under charges column)*

\*Please see **Addendum F** for Front Desk Closing Checklist\*

* 1. Update your graphs
     1. Once a new month is change, copy and paste the information on the right along with the other months.
     2. To change the date on the graphs, simply select the graph, right click and select Select Data. This gives you the options to select series or categories. Select Series and hit EDIT. Simply select ON the spreadsheet which information you want to use then hit ok and the graph will change. If you keep this up, you never have to do a new graph every month, all you have to do is edit.

### **Medical History Check (New Patient)**

* 1. When checking you need to make sure the name, address and phone numbers are entered correctly in DSN.
     1. Make sure if they have marked insurance, get a copy of the insurance card and add it under the Insurance Tab.
        1. Click the drop box. (A pop-up will show just click OK)
        2. Enter the information for the primary subscriber; it may not always be the patient, so look on the insurance card.
        3. Get the name of the subscriber
        4. Date of Birth
        5. Relationship to the patient
     2. Once entered, go to the Insurance drop box and select the correct insurance.
        1. It needs to match the claims address which can be located on the back or front of the card.
        2. *If there isn’t an address, if the address is different, if the insurance is not on file*, make a note to Eleanor and have her add the insurance information. **DO NOT ENTER ANYTHING UNTIL ELEANOR HAS INPUT THE NEW INFORMATION.**
        3. Input the ID and Group number
        4. *If the patient doesn’t have the card* please let them know that they can always call with that information you will need
           1. Name of subscriber
           2. Date of birth
           3. Relationship
           4. ID and Group number
           5. Address to mail claims
        5. *If the Address is nowhere to be found on the card of the insurance*, you must instruct the patient you cannot file without the address. They may ask you to call the insurance company to find out that information, you need to tell them, “Since we are out of network the insurance company will not release that information, it will be easier and more efficient if you were to call them.”
           1. Calling the insurance company will consume your time, and you will not be able to get this done, being on the phone with the insurance company may take longer than 30 minutes to get an

address.

# Addendum A

### **Morning Checklist**

\_\_ Arrive at work for Mon, Wednesday and Thursday at 7 am. Tuesdays arrive at work at 6 am.

\_\_ Log – in to the computer and clock in

\_\_ Unlock the front door; turn on the TV, lights and coffee pot. Stock all the supplies in the waiting area and also next to the front desk area.

\_\_ Check the patients bathroom for cleanliness and stock if needed

\_\_ Check messages

\_\_ Print out daily task sheets for each assistant place in their boxes

\_\_ Check the schedule and pull out any documents needed for the day in the accordion file.

\_\_ Check your email and address as required

\_\_ Clean the Doctors work station:

- Clean LNS loops and hang on peg

- Make sure he has 3 black pens and 1 red pen

- Make sure he has a note pad and post it notes

- Cleanup work area (any papers you’re not sure of put in DMJ chair)

- Clean cup, Refresh water and ice

\_\_ Print out daily schedules and hang in each operatory

\_\_ Write the next visit slips for the day

# Addendum B

### **Checking in Patient Checklist (new patients)**

\_\_ Welcome patient

\_\_ Take a picture

\_\_ Collect fee or collect the CGC donation by check or cash

\_\_ Make sure all papers and the MH sheet are filled out completely. (If not, ask the patient for missing information)

\_\_ Check the top information with what we have in computer for accuracy

Change nickname if necessary

If not enough time to add medical info, make a copy of the front and finish ASAP

If the patient has insurance, make a copy of the card, front and back, and enter the info

\_\_ When patient leaves, make sure of the following:

Adjust out CGC charge and mark on appt which Charity they selected

Has appointment or follow-up?

Put in task if needed for payment of treatment

### **Checking in Patient Checklist (regular seen patients)**

\_\_ Check schedule and time to anticipate which patient is arriving

\_\_ Look at photos to determine the name of the patient walking in (your goal is to acknowledge each patient walking in to avoid them signing in)

\_\_ If you are hold up on a call or busy with a patient, check the sign in sheet to see who has walked in to the office since you are occupied (constantly check the sign in sheet)

\_\_ Notify on the schedule that the patient is here and let an assistant or hygienist know that their patient is here.

\_\_ Collect any fees necessary before they are taken back.

# Addendum C

### **Checking Out Checklist**

\_\_ Make sure transaction entered by assistant or hygienist is completed

\_\_ Check if patient has insurance, if so print out claim form and mail the claim for the patient (hygiene

only)

\_\_ Collect fee and post payment

\_\_ Confirm patient has next appointment, if for some reason it can’t be scheduled today, place a follow

up for that patient and place notes as to why.

\_\_ Once patient has left the office, reconfirm patient has appointment or follow up and all transactions

are in the system.

\_\_ Check out patients. Right click on patient appointment, select checkout; a green bar will appear on

the left side of the appointment.

\_\_ Give Google Reviews to select patients and give pt instructions as needed. Make note in comments that you have done so.

# Addendum D

### **Calls Received Check List**

\_\_ Get name, company, phone number (even if they say we already have their number) and let them

know that someone will call them back.

\_\_ If it is a New Patient, transfer call to JAA or SER, if JAA & SER, take info, make appt and JMS will call.

\_\_ If it is a doctor wanting to speak to LNS and the patient is in the chair, get an assistant, give them the

doctor’s name, patients name and what they are calling about, and then let the assistant speak to LNS

and determine if he can take the call. If he can’t, take a message and place on LNS keyboard. If the

doctor doesn’t have a patient in the chair, take a message, get the patients name and doctors phone

number. This also applies to MES.

\_\_ If an active patient is bleeding, get an assistant right away.

\_\_If a call is regarding a current employee, collect data as directed in item one and let them know

someone will call them back.

\_\_ Email messages to DMJ, JAA, or ESS, because they will receive it faster.

\_\_ Put note in assistant box if you have a message for them, if it needs to be taken care of right away,

Find an assistant to handle.

# Addendum E

### **Pt Cancels or Reschedules Check sheet**

\_\_ If a patient tries to cancel appointment on the day of the appointment, offer another appointment date/time, if patient doesn’t want to reschedule:

- Document call in progress notes and of another appointment is not schedule, include that a follow up was placed

- Place a follow up under the correct type of appointment

- Add transaction of Bann

- Write Bann on paper copy of schedule (on right hand side of desk)

- Cancel appointment

\_\_ If patient tries to cancel an appointment, offer another appointment date/time, if patient doesn’t want to reschedule:

- Document call in progress notes and if another appointment is not scheduled, include that a follow up was placed

- Place a follow up under the correct type of appointment

- Cancel appointment

\_\_ If patient fails an appointment, call and reschedule patient. Let them know that they need to give us 24 hours notice and they don’t in the future, they will risk losing opportunity of scheduling. If patient doesn’t answer, leave message to return your call. Then do the following for failed appointments:

- Document call in progress notes and include all details regarding patient rescheduled or follow up placed

- If patient doesn’t reschedule, place a follow up

- Add transaction of FAIL

- Write FAIL on paper copy schedule (on right hand side of desk\_

- Cancel appointment

# Addendum F

### **Front Desk Closing Check list**

\_\_ Make sure reception room is clean, tidy and stocked with appropriate educational materials.

\_\_ Empty Trash

\_\_ Check patients bathroom for cleanliness and stock if needed

\_\_ Make sure all payments have been posted for the day. Make sure all patients have a transaction I for

the day and all patients that have left have a follow up appointment or a next appointment

\_\_ Once all patients have left the office, start end of day reports. Send email to DMJ, and JAA with Collection and Production

## **Using the Computer**

### **Adding a New Patient and Changing Patient Information**

A patient can belong to only one account, but an account can include several patients. You can also make changes to the patient’s information. After adding a patient, you can print a chart label for that patient. If you have only partial information on a patient, you can still begin the process and save the record if you have the patient’s name, gender, and guarantor. If a patient needs immedi­ate attention, you can activate a special notification to remind you of that fact.

You can open the New Patient window in any of these two ways:

* Click **New Pat** on the Navigation toolbar.
* On the **Go** menu, click **New Patient**

#### **To Add a New Patient**

1. Access the New Patient window, using one of the ways described above.

2. Type the Title, Last, First, and gender any other name elements that apply, pressing Enter or Tab after each field.

**Note:**Only two items are required as the minimum information for adding a new patient: patient name and gender. The patient’s telephone number is highly recommended as well. If you have a situation where you need to get a new patient in the system quickly, click the **Finish** button to bypass the account information. You can add supplementary information such as date of birth, address, and other elements after the patient arrives for the appointment.

3. Click the **interview** box to get a word document after entering pertinent data.

4. If the patient requires urgent care, click in the **Immediate Attention Needed** check box. We don’t usually do this.

**Note**: The **Immediate Attention Needed** remark appears on the Comments tab of the Patient window to alert you to this priority. To print a list of patients marked for Immediate Attention, see “To Print the Patients Not Yet Seen Report” in [Patient Treatment Status Reports](javascript:BSSCPopup('Patient_Treatment_Status_Reports.htm');) .

5. Click **Next** on the task toolbar. Indicate whether your new patient belongs to an existing account or if this is a new account. The Account Name and Address window appears.

6. In the **Street** box, type the street and press Enter. The cursor automatically moves to the **Zip Code** box.

7. In the **Zip Code** box, type the zip code and press Enter. The City and State boxes are filled in automatically. If Indian Harbor Beach, enter it now.

8. When done, click **Next** on the task toolbar. The Patient Phone Numbers window opens.

9. Type the phone number and press Enter. If this is not a home phone number, in the **Phone** box at left choose the correct type of phone number.

10. Type the work phone number and extension if available, and press Enter.

11. Select the Referral Source. In the **Referred By** box select **Doctor**, **Patient**, or **Other**. Then choose the name from the **Referral** drop-down box.

**Note:**You can add a new referring doctor by clicking the **Add Referring Dr** button under Referral Source. Tell Eleanor if you do this to make sure all information added is correct and complete.

12. Select the patient’s General Dentist in the lower **Referred By** box.

13. When done, click **Next** on the task toolbar. The Completed New Patient window opens, summarizing all of the information you entered.

14. Review the information. If you need to change any of it, click **Back** on the task toolbar until you reach that section and make the change.

15. When done, click **Finish** on the task toolbar.

16. Since you clicked the **Interview** box, the customized New Patient Interview Word document  launches. In this form, you can record the details of phone or direct contact with the patient regarding patient history, medical conditions, and related items. Be sure to pick whether the patient is a **Perio** or **Implant** patient in the drop-down box. You can also ask about x-rays at this point and note it.

17. Click “**close full screen**”

18. Go back to the patient tab 1. Click on “print” and print 1-chart label and 3-address label.

## **Patient Window**

The Patient window is organized into seven tabs:

* Name
* Insurance
* Follow-up
* Comments
* Alerts
* Prescriptions
* Attachments

These tabs contain patient information including the patient’s name, birth date, dental and medical insurance, follow-up information, patient-related comments, alerts, medications, documents and images. Information in this window is used for insurance processing, and follow-up tracking. You must enter information in the **Name** tab before the Perio-Exec program allows you to enter transactions for a patient.

Letter templates are available from the Patient window. The letters work in conjunction with Microsoft Word. When the letters are opened from the Patient window, Microsoft Word accesses the patient name, phone number, and address information from the Perio-Exec program and merges it into a form letter. The program can prompt you for images, such as x-rays, to be included in the letter. Because the letters are Microsoft Word templates, you can modify them. For more information about using Microsoft Word templates, click the Modifying Templates button.

To open the Patient window, use one of the following methods:

* On the **Go** Menu, Click **Patient**.
* Click the Large **Patients** Icon on the Home Window.
* Click **Patient** on the Navigation toolbar.
* Use **Ctrl+N** on the keyboard.

#### **Name Tab**

* Name (and nickname)
* Gender
* Birth Date and Age
* Title
* Home Phone and Other Numbers, such as Pager, Mobile or E-mail
* Status
* Primary Providing Doctor
* Social Security Number or ID
* Source and Type of Referral (Doctor, Patient, or Other)
* Doctors Referred to and Date Referred

#### **Insurance Tab**

The **Insurance** tab of the Patient window is divided into two sections: **Primary Subscriber** and **Secondary Subscriber**. Both sections contain information about the subscriber including:

* Name
* Patient Relation to Subscriber
* Gender
* Birth Date
* Employer
* Social Security or ID Number
* Insurance Company
* Group Number

You can also use the **Insurance** tab to modify the name of the subscriber using the **Modify name/add address**  button. If no subscribers exist, “Private Payment” is listed in the **Insurance** box. You can keep separate medical and dental insurance information. Click the Medical button at the bottom of the Insurance tab to add or remove primary and secondary medical insurance subscribers.

#### **Follow-up Tab**

You can find the following information in the Follow-up tab of the Patient window:

* First seen date
* Last maintenance date
* Last visit date
* Months between perio maintenance
* Appointment date
* Alternating recall option and appointment date
* Last notification date
* Projected next perio maintenance date
* Beginning treatment date
* Treatment complete date
* Active/Inactive status
* Patient Deceased
* Appointments on file and patient scheduling preferences

Following are descriptions of each of the elements in the **Follow-up** tab:

1. **First Seen date** — This is the date of the first time a transaction with a category code higher than 9 (but not 62) was entered for this patient.
2. **Last Perio Maintenance Date**  — the date of the last perio maintenance visit.
3. **Last** **Visit** — The date of the patient’s last visit is automatically updated whenever a charge is entered other than category 62 (finance charges, failed appointments, initial account balance, and charges that do not constitute a visit).
4. **PM Months** —  Number of months between maintenance appointments.
5. **Appointment** — The date of the patient’s next follow-up perio maintenance appointment is automatically updated when you enter a follow-upmaintenance appointment in Scheduler. If you do not have the Scheduler program, you can enter an appointment date manually. Click in the box and enter the appointment date.
6. **Last** **Visit** — The date of the patient’s last visit is automatically updated whenever a charge is entered other than category 62 (finance charges, failed appointments, initial account balance, and charges which do not constitute a visit).
7. **Follow-up date and type** — Type the specific date to call the patient back for a follow-up treatment and indicate the type of follow-up.
8. **Alternating Recall** — Schedule set to allow for visits to a regular dentist between perio maintenance appointments and date of next appointment.
9. **Last Notification** — A notification date is automatically updated. This date is the last time this patient was listed on a Follow-up report for notification.
10. **Projected Next Perio Maintenance** — The date of the next expected maintenance appointment.
11. **Beginning and Ending Treatment dates** — The starting and finishing dates for the treatment.
12. **Treatment** — A listing of the dates, tooth numbers, and description of treatment for the patient.
13. **Follow-up comment** — Comment that prints on the follow-up report such as the type of follow-up, or other patient information.
14. **Inactive** — Select this check box to mark a patient as inactive. Inactive patients do not appear on the Follow-up report. Marking a patient as inactive only removes that patient from the follow-up list. The account remains in your database until purged.
15. **Deceased** — Select this check box to mark former patients as deceased. When you choose this option, the Inactive check box is automatically selected and the patient is marked inactive.
16. **Patient Scheduling panel** -- The panel shows the appointments on file for the patient. Use the Preferences button to set the preferred hygienist, confirmation method, time of day, and day of week for the patient.

#### **Comments Tab**

The **Comments** tab of the Patient window holds comments about the patient. The Perio-Exec program places a check mark next to the title of the **Comments** tab when comments exist in this tab, and a red symbol to remind you about patients needing immediate attention.

The **Comments** tab also includes a **Registration Notes**section that indicates supplementary information related to the registration process, including insurance coverage, date registered (the date the patient record was created), notification of urgent priority, explanation of fees and delivery of x-rays.

#### **Alerts Tab**

The **Alerts** tab of the Patient window is designed to provide your office staff with a list of potential medical or physical problems. General Alerts regarding physical, medical or supplementary patient information may also be added here.

On the left side of the **Alerts** tab is an Allergies and Alerts section listing up to six alerts for the patient. Each **Allergies and Alerts** box allows you to either type the first letter(s) of the Health Alert you want to appear or click the arrow to drop-down a list of all available Heath Alerts to select. If any items are added to this box, a red **+** appears on the title of the **Alerts** tab and, if you are using the Scheduler program, in the Confirm Appointments window of Scheduler. Alerts automatically appear on the Patient Care Slip. The alerts will display on the Detail Daily Schedule report.

On the right side of the window is a **Pre-Medicate** check box with a box below it. See [Pre-Medication Alert](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/Pre_Medication_Alert.htm) for more information about how to use this area of the **Alerts** tab.

When the Perio-Exec program is installed, some basic Health Alerts are included. You are also able to enter other Health Alerts as needed. For more information about adding Health Alerts, as well as Medication and Pharmacy codes, see [Health Alert Codes](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/Health_Alert_Codes.htm), [Medication Codes](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/Medication_Codes.htm), and [Pharmacy Codes](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/Pharmacy_Codes.htm).

#### **Prescriptions Tab**

You can include information on the medications the doctor has prescribed for a patient. You can add, display, print out, and edit data including:

* Pharmacy Data, including Name, Phone Number and Fax Number
* The Type of Medication
* Dose
* Frequency
* Dispensing Amount
* Refills
* Comments Regarding the Prescription

By clicking on the **Frequency** or **Comment** buttons in the grid of the Prescriptions tab, you can view detailed information and notes about the particular medication in the **Prescription Frequency** and **Prescription Comment** pop-up boxes.

**Note:** Before adding a prescription you must have added the medication code. For more information see [Medication Codes](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/Medication_Codes.htm) and [Pharmacy Codes](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/Pharmacy_Codes.htm).

In addition, you can print out all prescriptions or individual ones, using the printer check box and the **Print Setup** button. A template for single or multiple prescriptions may be defined, as well as a choice to stop in MS Word before printing.

**Note:** Printing or deleting prescriptions requires permission to be granted by the System Administrator.

#### **Attachments Tab**

The **Attachments** tab of the Patient window displays any patient-related files such as letters, documents, e-mail, or images including x-rays. By selecting the type of document from the buttons at the top left of the tab and the category from the **Category** box, you can see a list of all available attachments that meet the selected criteria. You can also use this tab to add attachments to the patient’s record.

Perio-Exec provides the capability to work directly with your scanner or digital camera to acquire scans and digital images, such as photos and x-rays, and to attach them to patient records. You can even paste images directly into the Attachments tab, using the Windows clipboard and third-party image capture software. The **Attachments** tab contains the following information: The **Attachments** tab contains the following information:

* Letters
* E-mail
* Documents
* Images
* Category of Attachment
* List of all Available Documents
* Preview of the Images

#### **To Change Patient Information**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. In the **Patient Search** box, type the name of the patient and press Enter.

3. Select the incorrect information, type the new information, and then press Enter.

4. Click **Save** on the task toolbar.

5. Click **Close** on the task toolbar to close the Patient window.

### **Adding, Removing, and Changing Insurance Subscribers**

You can add or remove both primary and secondary insurance subscribers in the **Insurance** tab. You must have a primary subscriber before you can add a secondary subscriber. You must remove a secondary subscriber before you can remove the primary subscriber. You can also change information about a subscriber in the **Insurance** tab. When you enter a subscriber and the relationship is 1 (i.e. the patient and the subscriber are the same), the birthdate, SSN, and gender default from the patient information. Finally, you may also set or change the Assignment of Benefits at the subscriber level. The **Doctor** or **Patient** override of AOB can be made for either a Primary or Secondary Subscriber.

#### **To Add a Subscriber**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. Click the **Insurance** tab.

3. Select a patient name in the **Patient Search** box and press Enter.

4. Click **Add** on the task toolbar. The Add New Subscriber window opens. The right side of the window shows any subscribers already on file for this account.

5. Select **Primary** or **Secondary**. (You must enter a primary subscriber before you can add a secondary subscriber.)

6. In the **Enter Subscriber Initials** box, enter a two-character initial for this subscriber.

**Note**: If the same person carries both primary and secondary insurance coverage, you must use different initials when adding the person’s secondary subscriber information.

7. If the new subscriber’s initials match the patient’s initials, the patient’s name is entered for you in the name boxes. Otherwise, enter the subscriber’s first name, middle initial, and last name in the appropriate boxes.

8. Click **OK.** The Add New Subscriber window closes.

9. From the Patient’s Relation to Subscriber box, select 1 Self, 2 Spouse, 3 Child, 4 Other, 5 Handicapped Dependent, 6 Significant Other, 7 Injured Plaintiff or 8 Life Partner.

10. If **anything other than Self** is selected, type the gender and birth date in the appropriate boxes, pressing Enter after each entry. If **1 Self** is entered, the patient’s gender and birth date are entered automatically.

11. Select the subscriber’s employer name from the **Employer** box and press Enter. If the employer is not listed, see [Employer Codes](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/Employer_Codes.htm) to add a new employer.

12. Click **SS** or **ID**. Then, type the subscriber’s social security number or ID number and press Enter.

13. From the **Insurance** box, select an insurance company and press Enter. If the insurance company is not listed, see [Insurance Codes](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/Insurance_Codes.htm) to add a new insurance company.

14. Set the appropriate **Assignment of Benefits**, if you need to override from the **Insurance Company** or **Provider** setting.

15. In the **Group #** box, type the subscriber’s group number (up to 11 characters) and press Enter.

16. Click **Save** on the task toolbar.

17. Click **Close** on the task toolbar to close the Patient window.

#### **To Delete a Subscriber**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. Click the **Insurance** tab.

3. Select a patient name in the **Patient Search** box and press Enter.

4. Click **Delete** on the task toolbar. The subscriber is immediately deleted.

5. A warning window opens. Click **Yes** to remove the subscriber from the entire account. Click **No** to remove the subscriber but NOT delete them from the entire account.

**Note:** If you are trying to delete a primary subscriber and there is a secondary subscriber on this account, you must delete the secondary subscriber first.

6. Repeat steps 3 through 5 to delete other subscribers on the account.

7. Click **Close** on the task toolbarto close the Patient window.

#### **To Change the Secondary Subscriber to the Primary Subscriber**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. Click the **Insurance** tab.

3. Select a patient name in the **Patient Search** box and press Enter.

4. Click **Delete** on the task toolbar. The subscriber is immediately removed. A message window opens to ask if you wish to remove the subscriber from the account.

5. Click **No.**

6. Select the secondary subscriber’s name from the **Primary** **Subscriber** box and press Enter.

**Note:** Even though you have deleted the insurance coverage information from the **Secondary Subscriber** area of the **Insurance** tab, the Perio-Exec program keeps the information available, if you chose ‘No’ to the warning message when deleting.

7. From the **Patient’s Relation to Subscriber** box, select 1 Self, 2 Spouse, 3 Child, 4 Other, 5 Handicapped Dependent, 6 Significant Other, 7 Injured Plaintiff or 8 Life Partner.

8. Click **Save** on the task toolbar.

9. Click **Close** on the task toolbarto close the Patient window.

#### **To Change Subscriber Information**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. Click the **Insurance** tab.

3. Select a patient name in the **Patient Search** box and press Enter.

4. To change subscriber information, select the incorrect information and change it.  
-Or-  
To change the subscriber name, click the **Modify name/add address** button. When the Subscriber Name window opens, change the name and click **OK**.

5. You can also add a **Subscriber Alternate Address** if the subscriber’s address is different from the account address.

**Note**: The **Modify name/add addres**s button text turns red if an address has been entered.

6. Click **Save** on the task toolbar.

7. Click **Close** on the task toolbar to close the Patient window.

#### **To Override Subscriber Assignment of Benefits**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. Click the **Insurance** tab.

3. Select a patient name in the **Patient Search** box and press Enter.

4. Click the down arrow on the **Assign Benefits** drop-down box (on either the **Primary** or **Secondary Subscriber**). The default setting is **N** (N/A). When set to **N**, the AOB is determined by the setting at the insurance company or provider level. You may change this to **D** for pay Doctor or **P** for pay Patient.

**Note:** In the View Claims tab, the Assignment of Benefits shows in the Detail and Resubmit window for each claim as it was when the claim was printed or sent electronically.

5. Click **Save** on the task toolbar, then click **Close** to close the window.

#### **Additional Insurance Data**

The Additional Insurance Data button on the **Insurance** tab of the Patient window provides an opportunity to enter supplementary information about the patient, including:

* Marital Status
* Employment Status
* Student Status
* School
* Co-payment Amount

When data has been entered into any of these categories, the Additional Insurance Data button displays a red check mark to indicate that further information is available.

#### **To Add Additional Insurance Data**

1. On the **Go** menu, click **Patient**, or click **Patient** on the toolbar. The Patient window opens.

2. Click the Insurance tab.

3. Select a patient name in the **Patient Search** box and press Enter.

4. Click the **Additional Insurance Data** button. The Additional Patient Data window opens.

5. Select the Marital Status from the choices in the **Marital Status** box.

6. Select the Employment Status from the choices in the **Employment Status** box.

7. Select the Student Status from the choices in the **Student Status** selection box.

8. Select the School from the **School** box.

**Note:** In order for a school to appear in the School list, it is necessary to add it to the school codes. For more information, see [School Codes](mk:@MSITStore:C:\Dentexec\help\Dentalexec.chm::/School_Codes.htm).

9. Enter the Co-Payment Amount for the patient.

10. Click **Close** to exit and return to the Insurance window.

11. Click **Save** on the task toolbar to save your changes.

12. Click **Close** on the task toolbar to close the Patient window.

#### **Submit Status**

**Primary**: This option submits a primary claim and once a payment is applied to the primary claim, the secondary claim is automatically generated.

**Both**: This option submits both the primary and secondary claim at the same time.

**Hold**: This option holds any insurance claims that need to be submitted until the button is changed to either primary or both.

#### **Adding Patient Comments**

Patient comments can include personal, medical, and insurance information. You can define a system of comment-type codes specific to your office. Comments are automatically dated for you as they are added. You can also print out a list of comments for all patients or for a single patient.

To change an existing comment, select the date the comment was created to display the comment and click **Edit** on the task toolbar. To delete an existing comment, select the date the comment was entered to display the comment and click **Delete** on the task toolbar. A Warning window opens. Click **Yes** to delete the comment.

#### **To Add Patient Comments**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. Click the **Comments** tab.

3. Select a patient name in the **Patient Search** box and press Enter.

4. Click **Add** on the task toolbar.

5. In the **Type** box, type a comment type and press Enter. The comment type can be one alphanumeric character.

6. In the **Patient Comment** box, type the comment. The comment may be of any length, and the system wraps the text for you. You can also make use of existing Quick Text by clicking on the **Quick Text** button.

7. Select any **Registration Notes** that you would like to see, such as x-ray availability, insurance coverage, Registered date (the date the patient record was created), notification of urgent priority, and explanation of fees.

8. Click **Save** on the task toolbar.

9. Click **Close** on the task toolbar to close the Patient window.

#### **To Print Patient Comments**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. Click the **Comments** tab.

3. Select the patient in the **Patient Search** box.

4. Click **Print** on the task toolbar.

5. Select **A Single Patient** or **All Patients** option and click **OK**. The Patient Comments window opens.

6. Select **All** or **Selective**. If you choose **Selective**, type a range of dates in the **from** and **to** boxes in MM/DD/YYYY format. The default is one year.

7. If you chose **Selective**, select **All types**, or enter up to five comment-type codes in the **selective types** box.

**Note**: To automatically generate a list of all patients’ General Alerts, enter a plus sign character (+) in the **selective types** box after choosing **Selective** comments.

8. Click **OK.**

9. Do any of the following:

* To see the report before printing it, select **Print Preview** and click **Do Report.** The report appears. (Press Esc to close the Print Preview window.)
* To send the report to a printer, select **Printer** and click **Do Report**. Then, print the report. (The Report Output window closes automatically.)
* To send the report to an electronic file, select **File**. In the **File Name** box, type a name for the file and click **Do Report**. The file is saved in the Dentexec folder.

10. Click **Close** on the task toolbar to close the Report Output and Patient windows.

### **Pre-Medication Alert**

You can add a pre-medication alert with the type of pre-medication needed. To add a pre-medication alert, the code for the pre-medication must already be added to the system. If any pre-medication alerts are added, a red **Rx** appears on the title of the **Alerts** tab

#### **To Add a Pre-Medication Alert to a Patient File**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. In the **Patient Search** box, select the patient name and press Enter.

3. Click the **Alerts** tab.

4. Select the **Pre-Medicate** check box.

5. From the drop-down list below the **Pre-Medicate** check box, select the type of pre-medication.

6. Click **Save** to save the changes. The **Rx** appears on the **Alerts** tab.

When you make an appointment in the Scheduler window for a patient with a pre-medication specified, [PM] appears on the appointment.

**Note:**To remove the Pre-Medicate notation, clear the check box; the medication displayed in the box is cleared.

### **Creating General Alerts**

You can assign basic health alerts to a patient from the **Alerts** tab of the Patient window. You can also use the Patient General Alert button on the **Alerts** tab where you can add your own comments about a patient’s medical, physical, or other problems.

#### **To Create a General Alert**

1. On the **Go** menu, click **Patient** to open the Patient window. Then click the **Alerts** tab.

2. Click **Patient General Alert**. The General Alert for Patient window opens.

3. In the Active Dates area, either click **All**, or click **Date Range** and enter a range of dates in the **From** and **To** text boxes in MM/DD/YYYY format.

4. Type an Alert or comment in the text box area.

5. Select the default date (today’s date) or enter a different date in the **Create Date** box.

6. Choose Low, Normal or High from the **Priority** drop-down list.

7. Click **Save**.

8. Click **Close**.

### **Adding a Prescription**

#### **To Add a Prescription**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. On the Patient window, click the **Prescription** tab.

3. Select a patient name in the **Patient Search** box and press ENTER.

4. To add a prescription, click **Add** on the task toolbar. The New prescription window opens.

5. Click the down arrow on the **Prescribed Drug** box for a list of all medications currently entered. Choose a medication from the list.

6. Complete the prescription information as needed. Type dose, amount dispensed, number of refills, frequency, date, and comments, pressing Tab after each field. When done, click **Save**.

7. To review the dosage timing, click **Frequency**.

8. To review any notes regarding the prescription, click **Comment**.

9. To save the changes, click **Save** on the task toolbar.

#### **To Print a Prescription Using a Template**

1. On the **Go** menu, click **Patient**. The Patient window opens.

2. On the Patient window, click the **Prescription** tab.

3. Select a patient name in the **Patient Search** box and press Enter.

4. Select an existing prescription.

5. Click the **Print Setup** button. The Print Prescription box is shown.

6. Select **From Word** if you plan to use a template. If you are printing a label, the template functions are disabled.

7. For a single prescription, click the down arrow in the Single Prescription Template panel to choose a previously-created prescription template. For more information on templates, see  
.

8. Select the template you need for this particular prescription.

9. To halt printing in Word so that you can review the prescription before it is printed, click in the **Stop in Word** box.

10. To select a template for multiple prescriptions, click the down arrow in the Multiple Prescription Template area, and also decide whether to stop Word printing.

11. When you have finished, click **OK**. The Print Setup Prescription window closes.

12. Click **Print** on the Tool Taskbar. The program launches Microsoft Word and you see the prescription, formatted in the template you chose.

13. If necessary, enter the date and make any changes that are needed. Then, print out the prescription or prescriptions.

## **Transaction Codes**

Listed below are some transactions codes to enter in case you forget them or need to add them to a patient. They also serve as a cheat sheet and an easier way to put in transactions.

### ***Payment Transactions***

Zero down are the payments:

0004.2 – Visa/Mastercard

0004.3 – Discover

0004.4 – American Express

0004.6 – Care Credit

0004.8 – Springstone

0009 – Cash

0010 – Check

0060 – Reduce balance (Professional Courtesy)

0060.99 – Charitable Given Contribution

### ***New Patient Codes***

N down and then select what was done or enter:

9995 – Education with Assistant

0210 – Intraoral – complete series (FMX)

0220 – Intraoral – per apical first film (PA)

0230 – Intraoral – per apical each additional (Additional PA)

0330 – Panoramic film (PANO)

0360 – CT Scan

0180 – Comprehensive Periodontal Exam (Full Exam)

## **Merchandise Prices and Codes**

Many patients will ask you how much certain items we sell are worth .

The list below will you give them the answer.

Type in 999 the down area and the items we sell will be listed.

9996.ACI Acidophilus $6.00

9996.ARN Arnica $6.00

9996.B Supreme B $ 95.00

9996.BL Bleaching Tubes $20.00

9996.CAL Calm $16.00

9996.CFP CariFree CTX3 Paste $12.00

9996.CHL Chlorhexidine $10.00

9996.COM Juice Plus Complete $32.00

9996.COQ Co Q10-200mg $27.00

9996.HYD Hydrofloss $98.00

9996.MI Mi Paste $20.00

9996.MIN Theramints $24.00

9996.ORTH Ortho Mega Fish Oil $21.00

9996.PA5 Closys Paste 3.5oz $9.00

9996.PAS Closys Paste 7oz $12.00

9996.PER Periomed $9.00

9996.PRE Prevident5000 $10.00

9996.SON Sonicare Toothbrush $110.00

9996.THO Thornton’s Floss $4.00

9996. VID Vitamin D $7.00