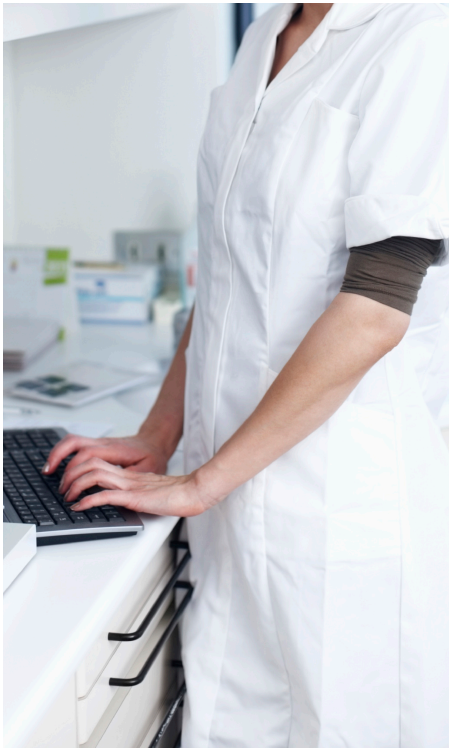


Denticon New Account Setup



IMPORTANT NOTE:
Please complete the workstation configuration checklist before New Account Setup.

Access the items in this checklist from the Setup Menu in Denticon.

SETUP MENU > OFFICES

Do not enter additional offices until an initial office is set up

- **Info tab** Update office information, including an option to upload the office logo
- **Setup tab** Select time interval (match your former practice management system if converting to Denticon) and create statement messages (optional)
- **Integration tab** Enter third party login credentials for any services used
- **Operatories tab** Name operatory with names or numbers (these names will appear on top of the columns in the scheduler). Here again the names should probably mimic your former practice management system if you're converting to Denticon from legacy software
- **Schedule tab** Enter the office hours
- **Holidays tab** Enter upcoming office holidays (exceptions to the normal office schedule)
- **Procedures tab** Can be skipped for now
- **Explosion codes tab** Can be skipped for now

SETUP MENU > PROVIDERS > PROVIDER SETUP

- Enter each provider, include their credential info such as dental license #, NPI, DEA, Tax ID
- Assign the provider to the offices in which he/she will treat

SETUP MENU > PROVIDERS > PER OFFICE SETTINGS

- **Schedule tab** Add or edit schedule to enter hours for provider
- **Holidays tab** Enter any exceptions to the provider's schedule
- **Operatories tab** Assign operatories to providers

SETUP MENU > SCHEDULER VIEWS

- Create an "All Provider" or "All Ops" view

SETUP MENU > SECURITY > GROUPS

- **Group setup** Prior to adding users and/or additional offices, edit and customize your security groups



DID YOU KNOW?

You can find helpful announcements and links on the Denticon login page?

Items include support webinar registration and information about software updates.

New Account Setup (continued)

SETUP MENU > SECURITY > USERS & USER PER OFFICE SETTINGS

- Enter unique username for each individual user
- Enter the user's first and last name
- Enter an email address and a security question and answer
- Select "patient search" as the start-up screen
- Assign a default schedule view
- Specify login days and hours
- Assign users to a security group

SETUP MENU > FEE SCHEDULES > FEE SCHEDULE SETUP AND FEE SCHEDULE ASSIGNMENTS

- Office Default: enter your UCR fees
- PPO fee schedules must to be set up as a "PPO" type
- HMO / Managed Care plan fee schedules must be set as "Managed Care/HMO" type
- Assign PPO fee schedules to carriers
- Attach HMO fee schedules to the appropriate plan when the plan is input

SETUP MENU > INSURANCE > INSURANCE PLANS

- Add insurance plans

SETUP MENU > PICK LIST

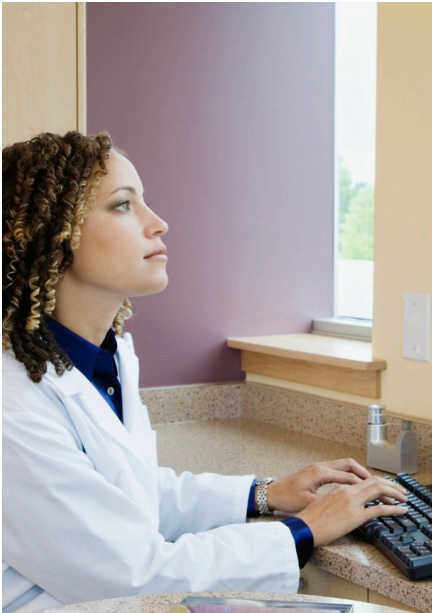
- Add new pick list items for use in progress notes and in medical and dental questionnaires

SETUP MENU > MEDICAL SETUP > MEDICAL ALERTS, MEDICAL QUESTIONNAIRE, DENTAL QUESTIONNAIRE

- Customize or edit any medical alerts and medical questionnaires (optional)

SETUP MENU > CHARTING > NOTES MACROS

- Add, edit, or delete existing notes macros for use in patient progress notes



New Account Setup (continued)

SETUP MENU > REFERRALS

- Enter any known non-patient referral sources (i.e., referral dental offices)

SETUP MENU > COLLECTION AGENCIES

- Enter any collection agency you currently use

SETUP MENU > PRESCRIPTIONS

- Add, edit, or delete prescriptions as required

SETUP MENU > LABS

- Add one or more labs you routinely use

SETUP MENU > PAYMENT TYPES

- Add any payment/adjustment types not already available but **DO NOT DELETE ANY EXISTING PAYMENT/ADJUSTMENT TYPES**

SETUP MENU > MISC SETUPS

- **Document type** (for scanned documents)
- **Patient types**
- **Responsible party types**
- **Referral types**
- **Scheduler production type**

IMPORTANT NOTE FOR CONVERSION OFFICES:

Do not enter any real patient information prior to your conversion as the conversion upload will overwrite it.