

How to Add a New Patient in Dentrix

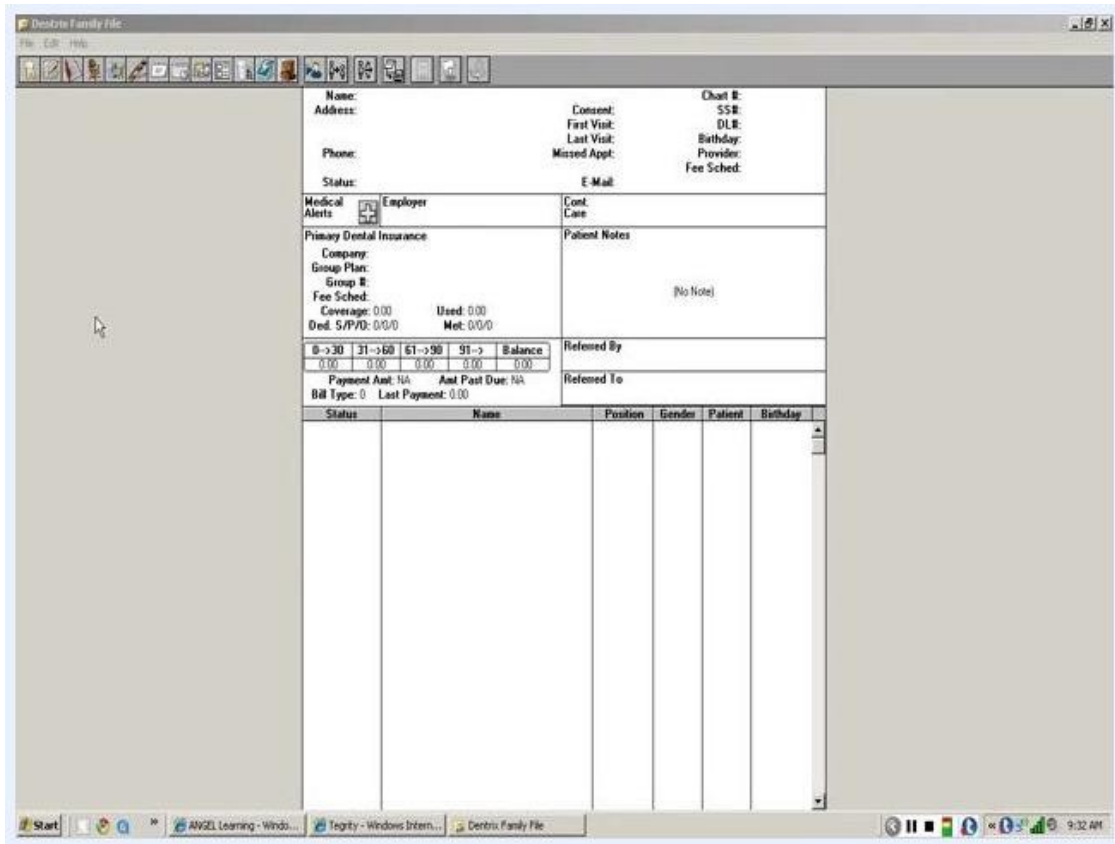
Adding a new patient in Dentrix starts in the Family File module, where you create a head-of-household record and then add any additional family members under that account. This guide walks you through accessing the Family File, entering head-of-house information, confirming provider and demographic details, and adding extra family members to complete the patient record.

Prerequisites

- You must be logged into Dentrix before beginning.
- A provider (dentist) must be available for selection; Dentrix will not let you save a new patient record without one assigned.
- Use only fictitious data (SSNs, phone numbers, etc.) when registering patients for training or demonstration purposes.

Step 1: Open the Dentrix Family File

Locate the Family File icon on your icon bar. It appears as a file folder with two small people in the corner. Click this icon to open the Family File screen.



Dentrix Family File

File Edit Help

Name: Address: Phone: Status: E-Mail: Consent: First Visit: Last Visit: Missed Appt: Chart #: SSN: DLR: Birthday: Provider: Fee Sched:

Medical Alerts: ☐ Employer: Cont. Case

Primary Dental Insurance: Company: Group Plan: Fee Sched: Coverage: 0.00 Used: 0.00 Met: 0.00 Ded: S/P/D: 0.0/0.0

Patient Notes: (No Note)

Referred By: Referred To:

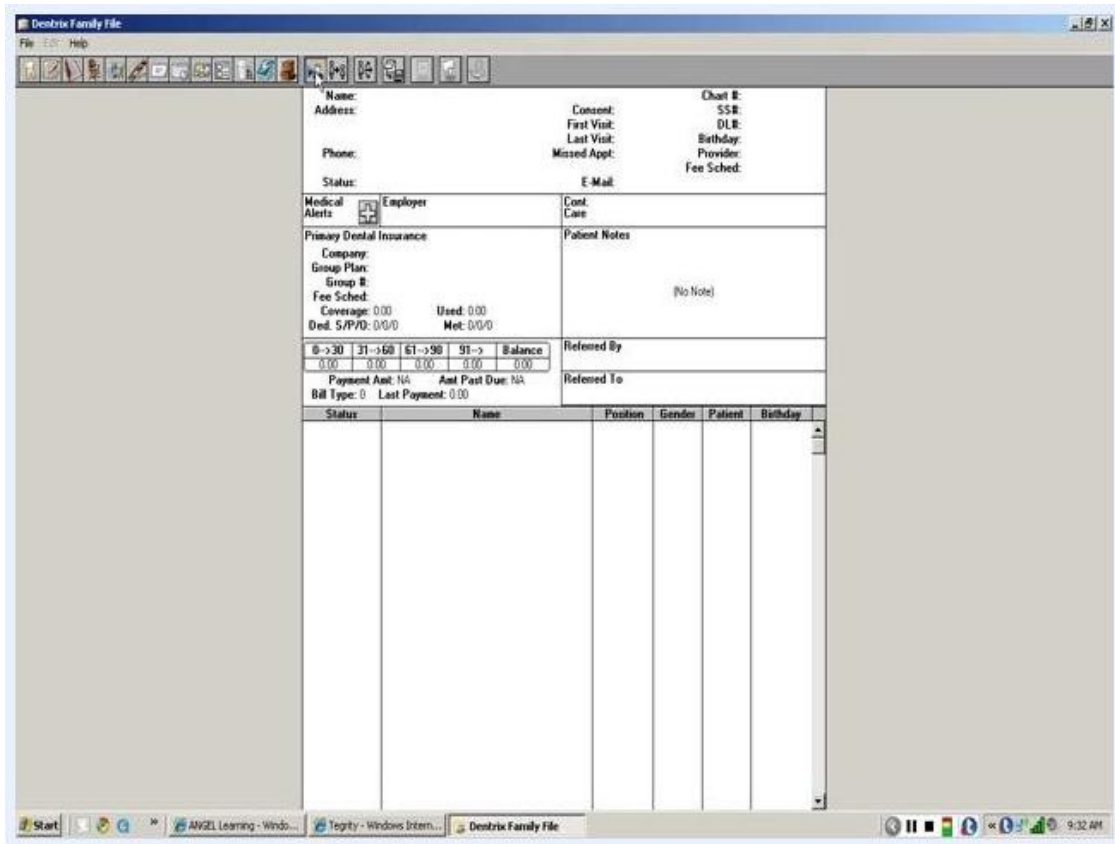
Status	Name	Position	Gender	Patient	Birthday

Start AVGEL Learning - Windows Integrity - Windows Intern... Dentrix Family File 9:32 AM

Dentrix Family File main screen with icon bar and patient information fields visible

Step 2: Open the new patient registration dialog

On the Family File screen, find the icon showing a blue boy figure, typically used to add a new patient or family. Click this icon to open the **Select a Patient** dialog.



Dentrix Family File screen with cursor near the blue boy icon on the toolbar

Step 3: Start a new family entry

In the **Select a Patient** dialog, click **New Family** to open the new patient registration form.

Step 4: Enter head-of-house information

A **Head-of-House Information** window opens. Fill in the following fields as needed:

- **Last Name** – enter the patient's last name (for example, type "hunter" without capitalizing the "H"; Dentrix will capitalize it automatically)
- **First Name** – enter the patient's first name

- **Preferred Name** – enter a preferred name if applicable
- **Status** – select the appropriate status (for example, Patient, Male, Single)
- **Other details** – complete fields such as Age, SS#, Driver's License #, Address, City, State, Zip, Email, and phone numbers

Use the **Tab** key to move between fields; Dentrix assists with formatting as you go.

The screenshot displays the 'Head-of-House Information' dialog box in the Dentrix Family File application. The dialog box is open, showing various fields for patient information. The 'Name' section includes 'Last', 'First', 'MI', and 'Preferred' fields. The 'Status' section has dropdowns for 'Patient', 'Male', and 'Single'. The 'Personal' section includes 'Birthdate', 'Age', 'SS#', 'Other ID', and 'Driver's License #' fields. The 'Address' section includes 'Street', 'City', 'ST', and 'Zip' fields. The 'E-Mail' field is also present. The 'Phone' section includes 'Home', 'Work', 'Ext', and 'Time To Call' fields. The 'FAX', 'Pager', and 'Other' fields are also visible. The dialog box also includes sections for 'Office' (Prov1, Prov2), 'Fee Schedule', 'Chart', 'Consent', 'Privacy Requests', and 'Visits'. The background shows the main Dentrix interface with various tabs and a table.

Head-of-House Information dialog open with fields for last name, first name, address, and other patient details

Step 5: Set patient status and demographics

In the **Status** section of the Head-of-House Information window:

- Confirm **Patient** is selected in the first dropdown.
- Select the appropriate gender (for example, Female).

- In the marital status dropdown, choose the correct status. It defaults to **Single**; select **Married** if applicable.

The screenshot shows the 'Head-of-House Information' dialog box in the Dentrix Family File software. The dialog box is open, displaying various fields for patient information. The 'Status' section has three dropdown menus: 'Patient' (selected), 'Female' (selected), and 'Married' (selected). Other fields include Name (Last: Hunter, First: Fun, MI:), Salutation, Title, Print Title on Stmts, Office Prov1, Prov2, COS2, Fee Schedule, (AUTO), Consent, Date, Privacy Requests, No phone calls, No correspondence, Disclosure restrictions, Vitals, First Visit, Last Visit, Last Missed Appt, Missed, Phone (Home, Work, Ext, Time To Call), FAX, Pager, Other, Address (Street, City, ST, Zip), E-Mail, and Driver's License. The background shows the main Dentrix Family File window with fields for Consent, Chart #, SSN, DLR, Birthday, Provider, Fee Sched, E-Mail, Cont. Case, Patient Notes, Referred By, Referred To, Past Due, and a table with columns Name, Position, Gender, Patient, and Birthday.

Head-of-House Information dialog with 'Patient', 'Female', and 'Married' selected in the status section

Step 6: Assign a provider

Locate the **Provider** field (often labeled **Prov1**). If a provider is not automatically filled in, click the box with two chevron marks next to the field to open the **Select Provider** dialog. Choose a provider with "DDS" in the name (for example, "DDS1 Smith, Dennis" or "DDS2 Smith, Marco, Dennis") and click **OK** to confirm.

The screenshot shows the 'Dentrux Family File' application window. The 'Patient Information' form is visible in the background, with fields for Name, Address, and Contact Information. Overlaid on this is the 'Select Provider' dialog box. The dialog box contains a table of providers with columns for ID, Name, and Status. The following table represents the data shown in the dialog:

ID	Name	Status
DDS1	Smith, Dennis	Primary
DDS2	Smith, Marco, Dennis	Primary
DDS3	Cook, Marco	Primary
END0	Evans, Eric	Primary
ORTH	Oliverson, Oscar	Primary
PECO	Childs, Brent	Primary
PERI	Pearson, Paul	Primary
CHIC	Chen, David	Primary

The 'DDS2' entry is currently selected. The dialog also includes checkboxes for 'No correspondence' and 'Disclosure restrictions', and fields for 'First Visit' (04/11/2011) and 'Last Visit'.

Select Provider dialog open, showing a list of providers with DDS and Primary status



Note: A provider selection is required. Dentrux will not allow you to register the patient without this field completed.

Step 7: Enter the patient's birth date

In the **Personal** section, locate the **Birthdate** field. Enter the date of birth using numbers only, with no slashes or dashes (for example, type "01012011" for January 1, 2011). Dentrux formats the date automatically.

The screenshot displays the 'Dentrux Family File' application window. A 'Head-of-House Information' dialog box is open, overlaying the main patient record. The dialog box has several sections: 'Name' (Last, First, MI, Preferred), 'Status' (Patient, Female, Married), 'Personal' (Birthdate, Age, SSN, Other ID, Driver's License #), 'Address' (Street, City, ST, Zip, E-Mail), and 'Phone' (Home, Work, Ext, Time To Call, FAX, Pager, Other). The 'Birthdate' field is currently empty, and the cursor is positioned over it. The background shows the main patient record screen with fields for 'Consent', 'Chart #', 'First Visit', 'Last Visit', 'Missed Appt', 'E-Mail', 'Cont. Case', 'Patient Notes', 'Referred By', 'Referred To', and a table for 'Name', 'Position', 'Gender', 'Patient', and 'Birthday'.

Head-of-House Information dialog with cursor in the Birthdate field, ready for numeric entry

In the **Personal** section, locate the **SS#** field. Enter a fictitious eight-digit number (for example, [12345678](#)). Never use a real SSN for demonstration or training purposes. Press **Tab** to move to the next field, and correct the entry if you type too many digits.

Head-of-House Information dialog with SS# field filled with a sample number, cursor ready to move to the next field

Step 9: Enter the street address

Click into the **Street** field under the **Address** section and type the patient's street address (for example, [123 Happy Lane](#)). Press **Tab** to move to the next line.

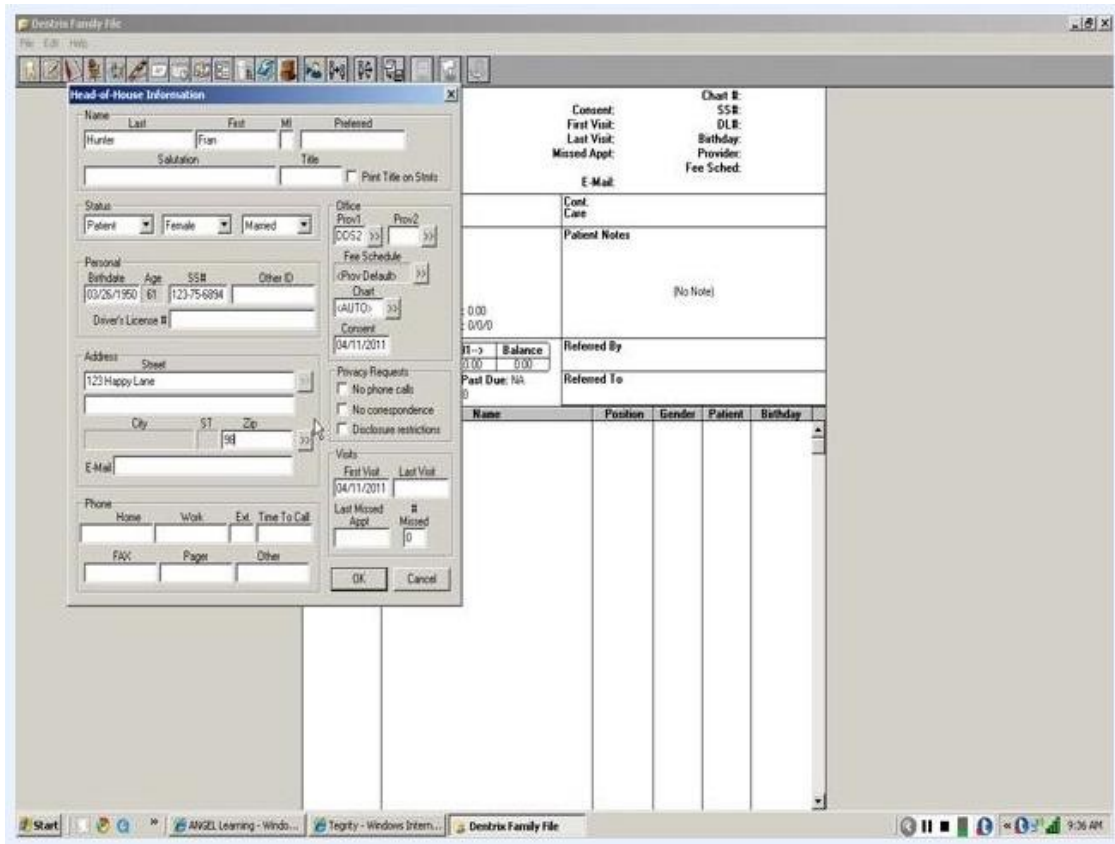
The screenshot shows the 'Head-of-House Information' dialog box in the Dentrix Family File software. The 'Street' field under the 'Address' section is populated with '123 Happy Lane'. The dialog box includes various fields for patient information, including Name, Status, Personal information, Office information, and checkboxes for privacy and consent. The background shows the main patient record form with fields for Consent, Chart #, First Visit, Last Visit, Missed Appt, E-Mail, Cont. Care, Patient Notes, Referred By, Referred To, and a table for visits.

Head-of-House Information dialog with '123 Happy Lane' entered in the Street field

If the patient has an apartment, suite, or unit number, enter it on the second address line that appears after pressing **Tab**. Otherwise, press **Tab** again to move to the **City** and **Zip** fields.

Step 10: Enter the zip code

Type the patient's zip code in the **Zip** field (for example, [98367](#)) and press **Tab**. If this zip code has already been used on this computer, Dentrix automatically fills in the corresponding city and state.



The screenshot shows the 'Head-of-House Information' dialog box in the Dentrix Family File software. The dialog box is divided into several sections:

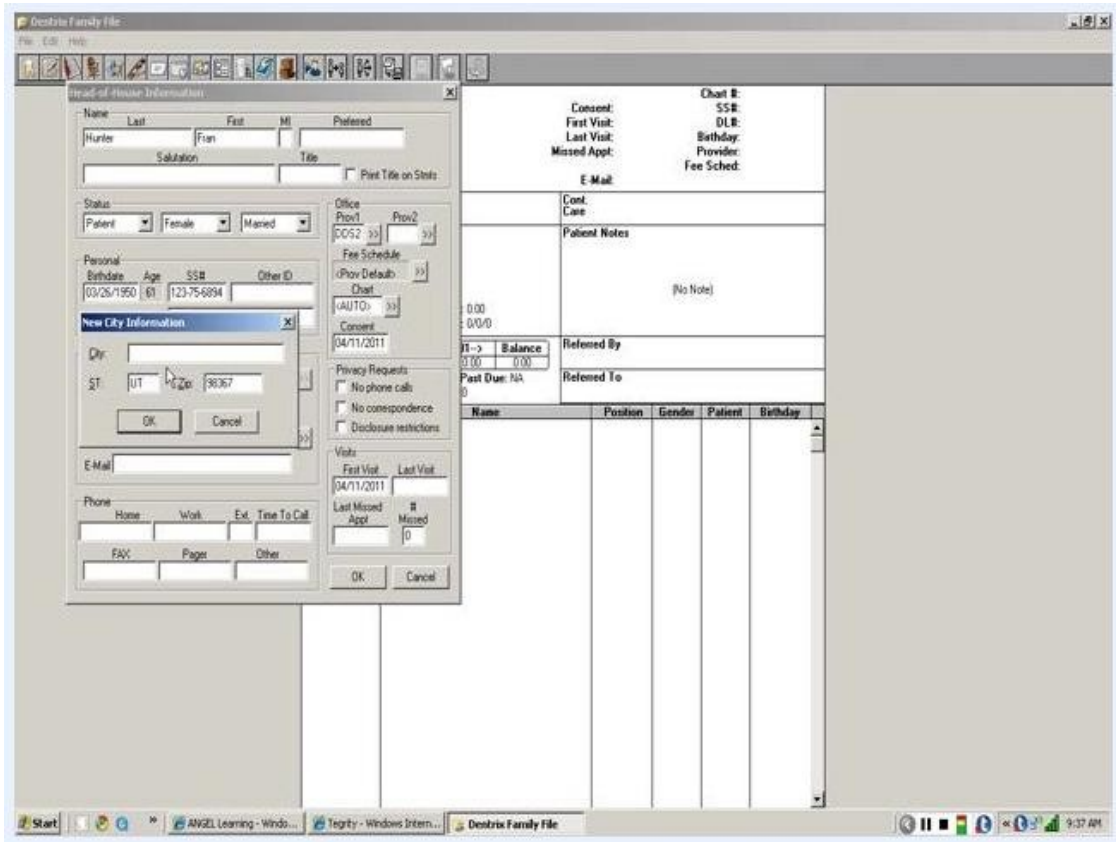
- Name:** Last (Hunt), First (Tom), Middle (), Preferred (), Salutation (), Title (), Print Title on Stmts ().
- Status:** Patient (), Female (), Married ().
- Personal:** Birthdate (03/26/1950), Age (51), SSN (123-75-6894), Other ID (), Driver's License # ().
- Address:** Street (123 Happy Lane), City (Seattle), ST (WA), Zip (98).
- E-Mail:** ().
- Phone:** Home (), Work (), Ext. (), Time To Call (), FAX (), Pager (), Other ().
- Office:** Prov1 (COS2), Prov2 (), Fee Schedule (), Prov Default (), Chart (), Consent (04/11/2011).
- Privacy Requests:** No phone calls (), No correspondence (), Disclosure restrictions ().
- Visits:** First Visit (04/11/2011), Last Visit (), Last Missed Appt (), # Missed (0).
- Consent:** First Visit (), Last Visit (), Missed Appt ().
- Chart #:** SSR (), DLR (), Birthday (), Provider (), Fee Sched ().
- Cont. Case:** ().
- Patient Notes:** (No Note).
- Referred By:** (), Referred To ().
- Balance:** (), Past Due: NA ().

The dialog box has 'OK' and 'Cancel' buttons at the bottom right. The background shows the main Dentrix Family File window with a table of patients.

Head-of-House Information dialog with zip code entered and city/state fields auto-filled

Step 11: Handle an unrecognized zip code

If the zip code is not recognized, a **New City Information** dialog appears. Type the city name (for example, [Port Orchard](#)) in the **City** field, and select or type the correct state abbreviation in the **ST** field (for example, change the default **UT** to **WA** for Washington). Confirm the zip code is correct, then click **OK** to save the new city and state information.

The screenshot shows the 'Dentrix Family File' application window. A 'New City Information' dialog box is open in the foreground, prompting for city and state entry. The dialog has fields for 'City' (with a text input), 'ST' (with a dropdown menu showing 'UT' and a search icon), and 'Zip' (with a text input containing '98367'). There are 'OK' and 'Cancel' buttons at the bottom. In the background, a patient record form is visible, including fields for Name, Status, Personal information (Birthdate, Age, SSN, Other ID), Office information (Prov1, Prov2, Fee Schedule, Consent), and a table for visits. The taskbar at the bottom shows the Start button and several open applications: 'ANGEL Learning - Wind...', 'Tegrity - Windows Intern...', and 'Dentrix Family File'.

New City Information dialog open, prompting for city and state entry for an unrecognized zip code

Step 12: Skip the email field if needed

An email address is optional during patient registration. You can leave this field blank and continue; Dentrix does not require it to complete the record.

Step 13: Enter a phone number

At least one phone number is required for each patient. Enter the number without dashes (for example, "3608765432"). Use test data only—never a

real phone number for demonstration or training. After entering the number and pressing **Tab**, Dentrix formats it automatically.

Step 14: Review and save the head-of-house record

Before saving, confirm that all required fields are complete: name, status, gender, marital status, provider, birthdate, SS#, address, and at least one phone number. Click **OK** to save the information and continue with registration.

The screenshot shows the 'Head-of-House Information' dialog box in the Dentrix Family File software. The dialog box is filled with the following information:

- Name:** Last: Hunter, First: Fran, MI: (blank), Preferred: (blank), Salutation: (blank), Title: (blank), Print Title on Stubs: (unchecked)
- Status:** Patient (selected), Female (selected), Married (selected)
- Office:** Prov1: DCS2, Prov2: (blank)
- Fee Schedule:** AUTO (selected)
- Birthdate:** 03/21/1954, SS#: (blank), Other ID: (blank)
- Driver's License:** (blank)
- Address:** Street: 1234 Happy Lane, City: Port Orchard, ST: WA, Zip: 98367
- E-Mail:** (blank)
- Phone:** Home: 3608765432, Work: (blank), Ext: (blank), Time To Call: (blank), FAX: (blank), Pager: (blank), Other: (blank)
- Privacy Requests:** No phone calls (unchecked), No correspondence (unchecked), Disclosure restrictions (unchecked)
- Visits:** First Visit: 04/11/2011, Last Visit: (blank), Last Missed Appt: (blank), # Missed: 0

The background window shows the main Family File interface with a table of patients. The table has columns for Name, Position, Gender, Patient, and Birthday. The first row shows 'Hunter, Fran' as the patient.

Head-of-House Information dialog with all required fields filled, ready to save

Step 15: Verify the saved information

After saving, the main Family File window displays the entered information, for example:

- **Name:** Hunter, Fran
- **Address:** 1234 Happy Lane, Port Orchard, WA 98367
- **Phone:** 3608765432

Confirm that all details appear correctly in the summary pane.

The screenshot shows the 'Dentrix Family File - Hunter, Fran [HUS0002]' window. The summary pane contains the following information:

Name: Hunter, Fran
Address: 123 Happy Lane
Port Orchard, WA 98367
Phone: H (360) 755-5432
Status: Active, F, Married, Guar, H of H

Consent: 04/11/2011
First Visit: 04/11/2011
Last Visit:
Missed Appt:

Chart #: HU0002
SSN: 123-45-6789
DLE:
Birthdate: 03/26/1980, 61
Provider: 0052
Fee Sched: (Prov Default)

Medical Alerts:
Employer:
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Used: 0.00
Ref: 0.00
Met: 0.00

Primary Dental Insurance:
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Used: 0.00
Ref: 0.00
Met: 0.00

Payment Amt: NA
Ant Paid Due: NA
Bill Type: 1
Last Payment: 0.00

Referred By:
Referred To:

Status	Name	Position	Gender	Patient	Birthdate
H of H	Hunter, Fran	Married	Female	Yes	03/26/1980

Summary view of the saved head-of-house information, showing name, address, city, state, ZIP, and phone number in the Family File

Understand the head-of-household status

The first person entered into a new family file is always designated the "head of household" and acts as the guarantor for the account. This status appears in the main Family File window under the **Status** column as "HoH Guar" (Head of Household Guarantor). The summary pane displays the head-of-household's name, address, phone, and status.

Dentrix Family File - Hunter, Fran [HU0002]

File Edit Help

Name: Hunter, Fran
Address: 123 Happy Lane
Port Orchard, WA 98367
Phone: H (360)876-5432
Status: Active, F, Married, Guar, HoH

Consent: 04/11/2011
First Visit: 04/11/2011
Last Visit:
Missed Appt:

Chart #: HU0002
SSN: 123-75-6894
DL#:
Birthday: 03/26/1950, 61
Provider: DD52
Fee Sched: (Prov Default)

E-Mail:

Medical Alerts: ☐ Employer: ☐ Cont. Case: ☐

Primary Dental Insurance:
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00 Used: 0.00
Ded. S/P/D: 0.0/0.0 Met: 0.0/0.0

Payment Amt: NA Amt Past Due: NA
Bill Type: 1 Last Payment: 0.00

Referred By:
Referred To:

Refused By:
Refused To:

Status	Name	Position	Gender	Patient	Birthday
HoH Guar	Hunter, Fran	Married	Female	Yes	03/26/1950

Dentrix Family File window showing the head-of-household (Fran Hunter) as "HoH Guar" with all demographic and account details

Step 16: Add a new family member

To add another person to the same family file, locate the icon next to the blue boy in the toolbar—this is the **Add New Family Member** button. Hovering over it displays a tooltip confirming its function. Click the button to open a new **Patient Information** dialog, pre-filled with the family's shared address and other details.

The screenshot shows the Dentrix Family File window for 'Hunter, Fran' [HUR002]. The toolbar at the top contains various icons, with the 'Add New Family Member' button (a blue boy icon) highlighted by a yellow tooltip. The main window displays patient information for 'Hunter, Fran'.

Patient Information:

- Name:** Hunter, Fran
- Address:** 123 Pippy Lane, Port Orchard, WA, 98367
- Phone:** H (360) 876-5432
- Status:** Active, F, Married, Guar, HollH
- Consent:** 04/11/2011
- First Visit:** 04/11/2011
- Last Visit:**
- Missed Appt:**
- Chart #:** H100002
- SSN:** 123-79-6894
- DLB:**
- Birthdate:** 03/26/1950, 61
- Provider:** 0052
- Fee Sched:** (Prov Default)

Medical Alerts: [X] **Employer:** [X] **Cont. Case:**

Primary Dental Insurance:

- Company:**
- Group Plan:**
- Group #:**
- Fee Sched:**
- Coverage:** 0.00 **Used:** 0.00
- Decl. S/P/D:** 0/0/0 **Met:** 0/0/0

Payment: 0.00 **Balance:** 0.00

Payment Amt: NA **Amt Past Due:** NA

Bill Type: 1 **Last Payment:** 0.00

Referred By:

Referred To:

Referral Notes: (No Note)

Status	Name	Position	Gender	Patient	Birthdate
HollH Guar	Hunter, Fran	Married	Female	Yes	03/26/1950

Dentrix Family File window with the mouse hovering over the "Add New Family Member" button in the toolbar, showing the tooltip

Step 17: Enter the new family member's information

In the **Patient Information** dialog, complete the fields for the new family member:

- **Last Name** – enter the last name (pre-filled if it matches the head of household)
- **First Name** – enter the first name
- **Status** – select Patient
- **Gender** – select the appropriate gender

Additional fields such as Work, FAX, Pager, or Other are optional.

Dentrix Family File - Hunter, Phil [005092]

File Edit Help

Patient Information

Name: Hunter, Phil
 Last: Hunter First: Phil MI: Preferred:
 Salutation: Title: ☐ Print Title on Stools

Status: Patient Sex: Male Marital Status: Single
 Personal Birthdate: Age: SS#: Child: Other:
 Driver's License #:

Address: Street: 123 Happy Lane City: ST: Zip: Port Orchard WA 98367
 E-Mail:

Phone: Home: 360876-5432 Work: Ext: Time To Call: FAX: Pager: Other:

Office: Prov1: 0052 Prov2:
 Fee Schedule: Prov Default: Chart:
 Consent: 04/11/2011

Privacy Requests: ☐ No phone calls ☐ No correspondence ☐ Disclosure restrictions

Visits: First Visit: 04/11/2011 Last Visit:
 Last Missed Appt: # Missed: 0

OK Cancel

Chart #: SSR
 First Visit: DLR
 Last Visit: Birthday:
 Missed Appt: Provider:
 E-Mail: Fee Sched:

Consent: 0
 First Visit: 0
 Last Visit: 0
 Missed Appt: 0

Referral: Referred By: Referred To:

Name	Position	Gender	Patient	Birthday
Mamed	Female	Yes	02/25/1950	

(No Note)

0.00 Balance
 0.00 0.00
 Past Due: NA
 0

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9:40 AM

Patient Information dialog open for new family member entry, with fields for name, status, gender, marital status, SS#, address, and phone. "Phil Hunter" is being entered as a male, married patient.

Step 18: Verify and edit phone numbers

Review the **Phone** section in the Patient Information dialog. The **Home** number is pre-filled from the family's shared information. If you need to add a mobile or cell number, use the **Other** field, since there is no dedicated **Cell** field. You can also enter numbers for **Work**, **FAX**, or **Pager** if applicable. Not all phone fields are required, but having at least one accessible number is recommended.

The screenshot shows the 'Patient Information' dialog box in a medical software application. The dialog is titled 'Patient Information' and contains various fields for patient data. The 'Phone' section at the bottom includes fields for Home, Work, FAX, Pager, and Other. The cursor is positioned near the FAX field. Other sections include Name, Status, Personal, Address, E-Mail, Office, Fee Schedule, Consent, Privacy Requests, and Visits. The background shows a patient record form with fields for Consent, Chart #, SSR, DLR, Birthdate, Provider, Fee Sched, Cont. Case, Patient Notes, Referred By, Referred To, and a table of visits.

Name	Position	Gender	Patient	Birthdate
	Married	Female	Yes	10/26/1950

Patient Information dialog showing phone fields: Home, Work, FAX, Pager, and Other. Cursor is near the FAX field.

Step 19: Save the new family member's record

Double-check all entered information for accuracy, including name, status, gender, marital status, SS#, address, and phone numbers. Click **OK** to save the new family member's information and close the dialog. The Family File window updates to show the new member in the family list.

The screenshot shows the 'Dextrix Family File' application window. A 'Patient Information' dialog box is open, displaying the following fields:

- Name:** Last: Hunter, First: Phil, Middle: (blank), Preferred: (blank)
- Salutation:** (blank), **Title:** (blank), **Print Title on Sticks:** (unchecked)
- Status:** Patient, **Gender:** Male, **Married:** Married
- Personal:** Birthdate: 05/02/1949, Age: 61, SSN: 222-22-3333, Other ID: (blank)
- Address:** Street: 123 Happy Lane, City: Port Orchard, ST: WA, Zip: 98367
- E-Mail:** (blank)
- Phone:** Home: 3608765432, Work: (blank), Ext: (blank), Time To Call: (blank), Pager: (blank), Other: (blank)
- Office:** Prov1: DCS2, Prov2: (blank)
- Fee Schedule:** (Prov Default): (blank), Chart: (blank), (AUTO): (blank)
- Consent:** 04/11/2011
- Privacy Requests:** No phone calls: (unchecked), No correspondence: (unchecked), Disclosure restrictions: (unchecked)
- Visits:** First Visit: 04/11/2011, Last Visit: (blank), Last Missed Appt: (blank), Missed: 0

The background window shows the 'Family File' interface with a table of family members:

Name	Position	Gender	Patient	Birthdate
Hunter, Phil	Married	Male	Yes	05/02/1949

Patient Information dialog with all fields filled, ready to be saved

Step 20: Verify the family member was added

After saving, confirm the new family member appears in the Family File list under the head-of-household. The list displays each member's status, name, position, gender, patient status, and birthday. The summary pane at the top shows the details of the currently selected member.

The screenshot shows the Dentrix Family File window for "Hunter, Fran [HUS0002]". The summary pane at the top displays details for the selected member, Hunter, Phil. Below this, the "Family File" list shows two members: Hunter, Fran (HoH Guar) and Hunter, Phil.

Summary Pane Details:

- Name: Hunter, Phil
- Address: 123 Happy Lane, Port Orchard, WA, 98367
- Phone: H (360) 876-5432
- Status: Active, M, Married
- Consent: 04/11/2011
- First Visit: 04/11/2011
- Last Visit: Missed Appt
- E-Mail:
- Chart #: HU0003
- SSN: 222-22-3333
- DL#: 05/02/1949, 61
- Birthdate: 05/02/1949, 61
- Provider: 0052
- Fee Sched: (Prov Default)

Family File List:

Status	Name	Position	Gender	Patient	Birthday
HoH Guar	Hunter, Fran	Married	Female	Yes	10/28/1951
	Hunter, Phil	Married	Male	Yes	05/02/1949

Dentrix Family File window showing both "Hunter, Fran" (HoH Guar) and "Hunter, Phil" as family members

Step 21: Add additional family members as needed

To add more family members, such as children, click the **Add New Family Member** button again and repeat the same entry process. The steps are identical for each additional member, regardless of age or relationship.

Dentrix Family File - Hunter, Fran [HU0002]

Address: 123 Happy Lane
Port Orchard, WA 98367

Phone: H (360) 876-5432

Status: Active, M, Married

Consent: 04/11/2011
First Visit: 04/11/2011
Last Visit:
Missed Appt:

Chart #: HU0003
SSN: 222-22-3333
DOB:
Birthday: 05/02/1949, 61
Provider: 0052
Fee Sched: (Prov Default)

Medical Alerts: ☐ **Employer:** ☐ **Cont. Case:**

Primary Dental Insurance:
Company:
Group Plan:
Fee Sched:
Coverage: 0.00 **Used:** 0.00
Ded. S/P/D: 0.0/0.0 **Met:** 0.0/0.0

Patient Notes:
(No Note)

Referred By:
Referred To:

Status	Name	Position	Gender	Patient	Birthday
Head of Household	Hunter, Fran	Married	Female	Yes	02/02/1951
	Hunter, Phil	Married	Male	Yes	05/02/1949

Dentrix Family File window with the "Add New Family Member" button highlighted in the toolbar

Summary

You have now learned how to add a new patient in Dentrix by creating a head-of-household record in the Family File, assigning a provider, entering demographic and contact details, and adding additional family members to the same account. Always use fictitious data for training and demonstration purposes, and double-check required fields—especially provider, birthdate, and phone number—before saving each record.