How to create patient alerts in Dentrix

Patient alerts (pop-up notes) display important reminders or information about a patient directly within Dentrix. This guide shows you how to create patient alerts in Dentrix, choose where they appear, and edit, suppress, or delete them. It also covers alert note templates and the Health History module.

Prerequisites

- Access to Dentrix and to a patient-specific module, such as the Appointment Book, Patient Chart, Perio Charting, or Questionnaires.
- Access to the Office Manager, if you want to manage alert note templates.

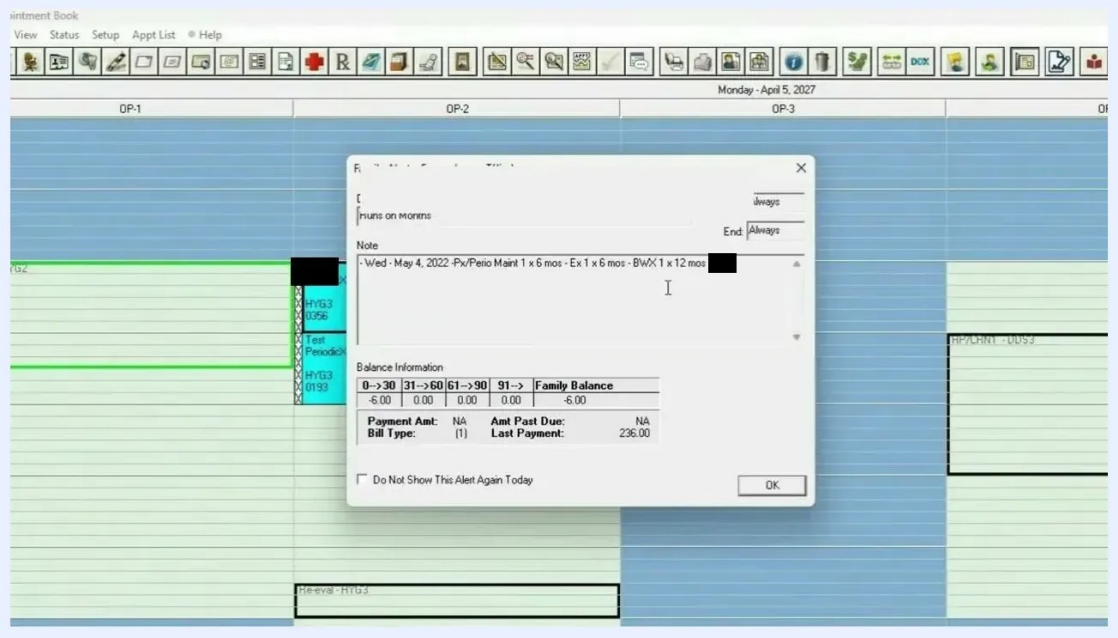
Step 1: Identify patients who already have alerts

Alerts appear as flags on patient appointments in the schedule. This lets you see at a glance which patients have alerts attached.

In the Appointment Book, look for the flag icon on the patient's appointment:

- A white flag means no alert is attached.

- A yellow flag means an alert is attached.



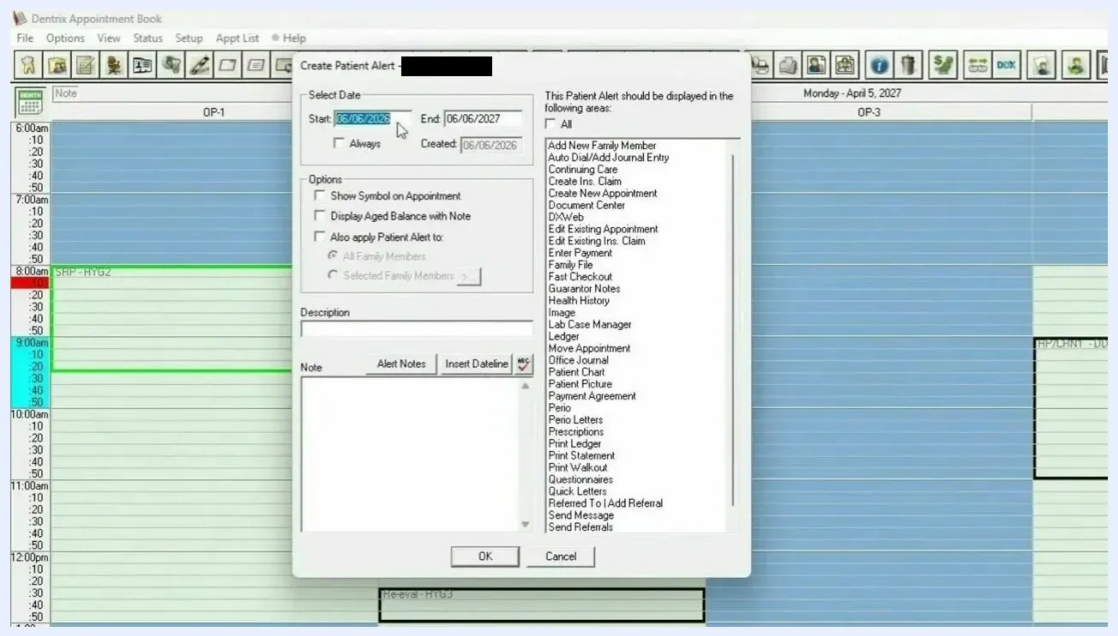
Dentrix Appointment Book showing one appointment with a yellow alert flag and one with a white flag (no alert)

Step 2: Open Patient Alerts to start creating a patient alert

You can create or manage alerts from any patient-specific module in Dentrix, such as the Appointment Book, Patient Chart, Perio Charting, or Questionnaires.

1. Click the patient's appointment or record to select the patient.

2. In the toolbar, click the **Patient Alerts** icon. Hovering over it displays "Patient Alerts...".



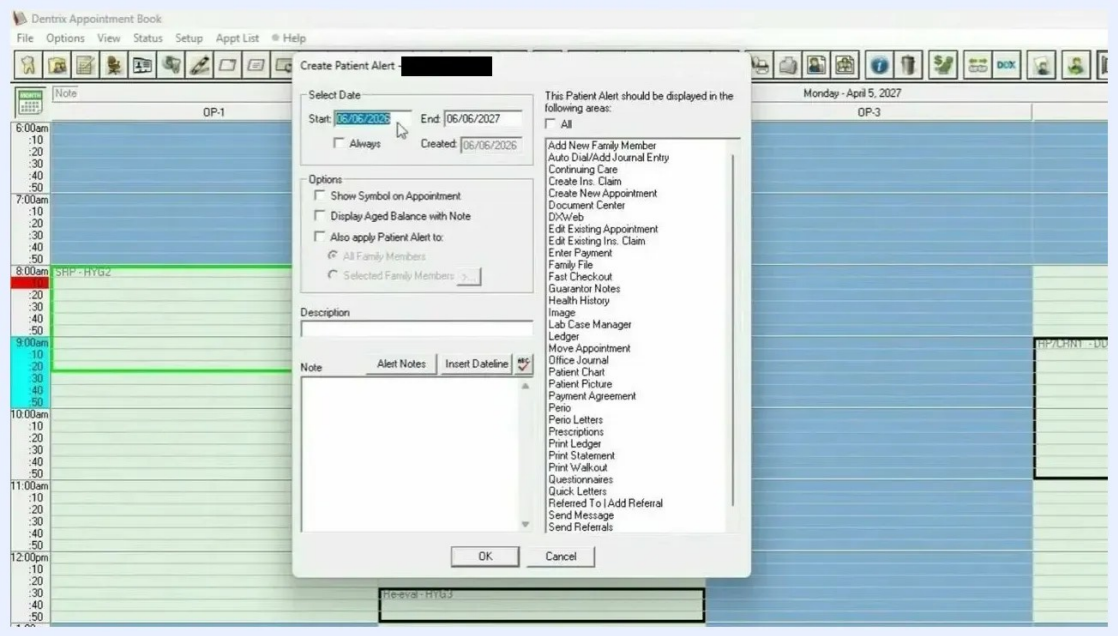
Dentrix toolbar with the cursor over the Patient Alerts icon and its tooltip visible

Step 3: Set the alert dates

After you click the icon, the **Create Patient Alert** window opens. Use the **Select Date** section to set when the alert is active.

1. Enter a **Start Date** (for example, 06/06/2026).
2. Enter an **End Date** (for example, 06/06/2027) if the alert is for a specific period.

3. Alternatively, check **Always** if the alert should always be active for this patient.



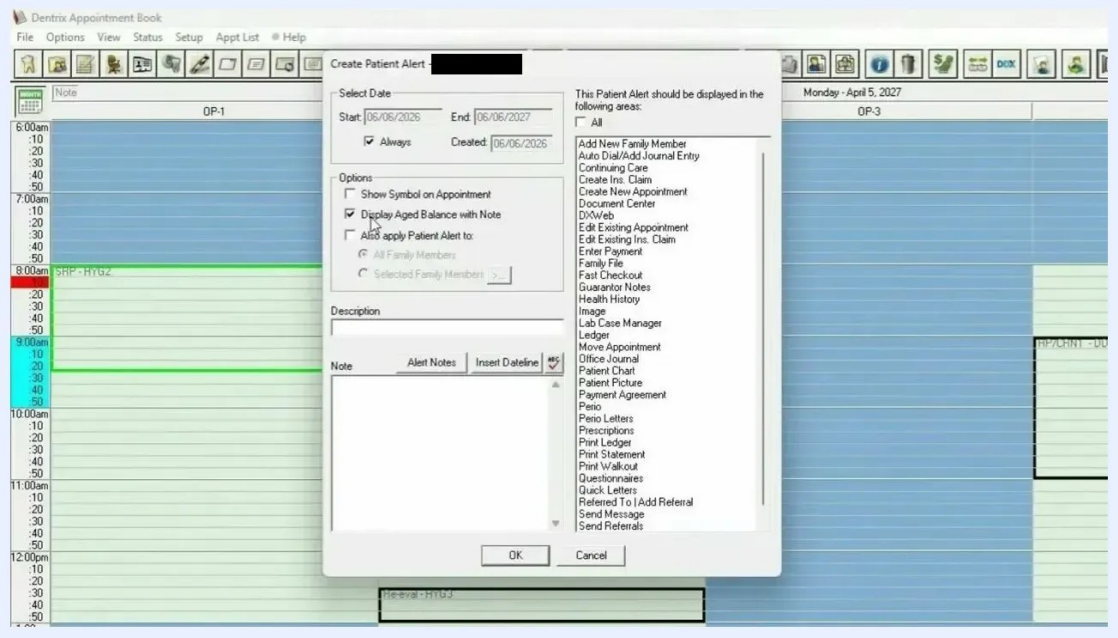
Create Patient Alert window showing the Start Date, End Date, and Always options

Step 4: Decide whether to show the aged balance

Choose whether the pop-up alert displays the patient's aged balance.

- Check **Display Aged Balance with Note** if you want the patient's balance to appear in the alert.

- Leave it unchecked if you do not want this information shown.



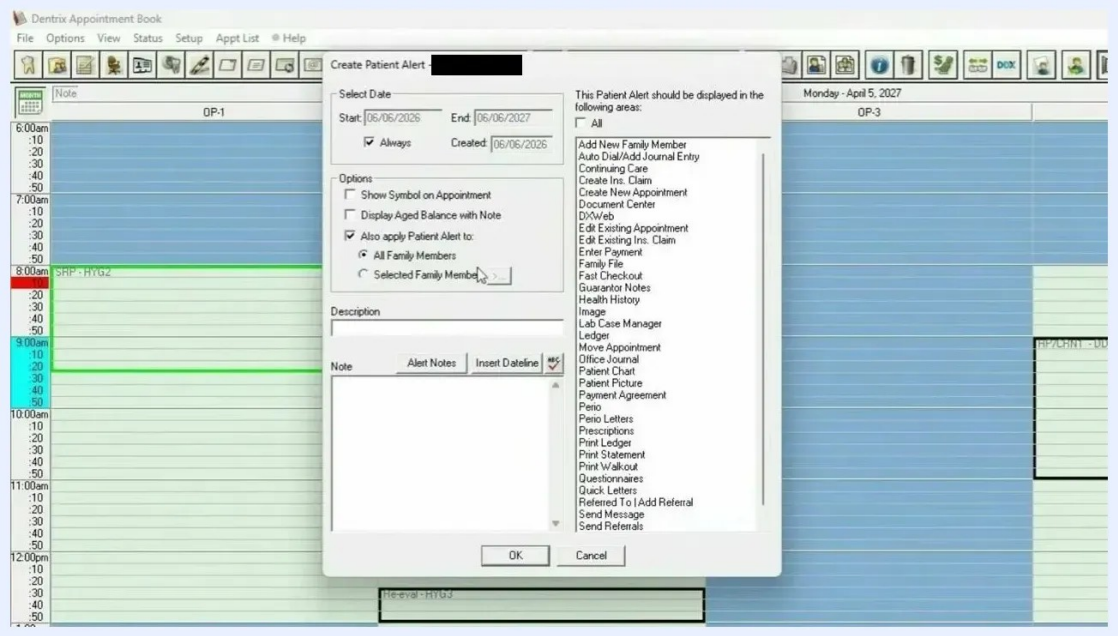
Create Patient Alert window with Display Aged Balance with Note checked

Step 5: Apply the alert to family members (optional)

If the alert applies to more than the selected patient, use the family member options. If the alert is only for this patient, leave the option unchecked.

1. Check **Also apply Patient Alert to:**.
2. Choose **All Family Members** to apply the alert to everyone in the family.

3. Or choose **Selected Family Members** and specify which members should receive the alert.



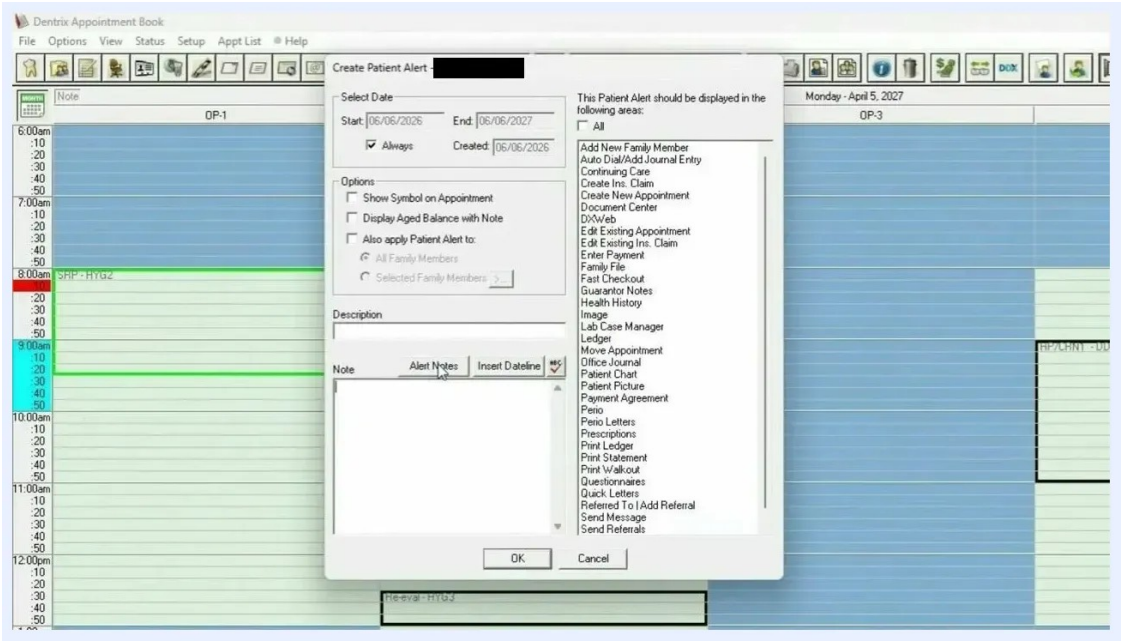
Create Patient Alert window with Also apply Patient Alert to checked and Selected Family Members highlighted

Step 6: Enter the description and note

Describe the alert and write the message that staff will see.

1. In the **Description** field, type a brief summary of the alert.
2. In the **Note** field, enter the detailed message you want to appear in the pop-up.

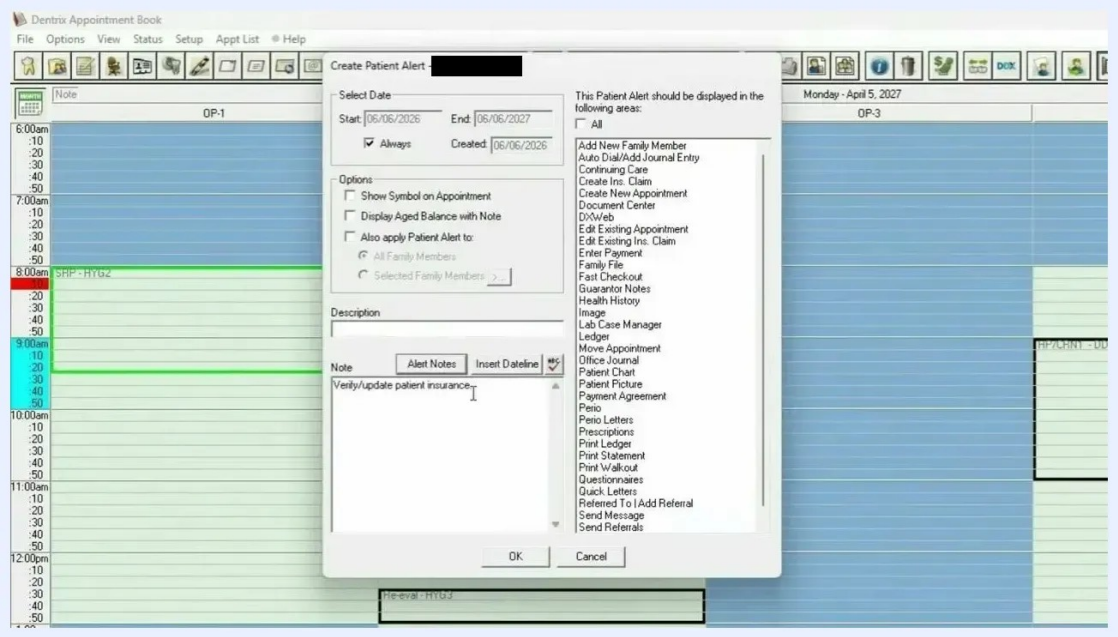
To use a frequently used template, click the **Alert Notes** button, select a template (for example, "Verify/update patient insurance"), and click **OK** to insert it into the note. You can also click **Insert Dateline** to add a timestamp to your note.



Create Patient Alert window with the cursor over the Alert Notes button, ready to insert a template note

Step 7: Review the note

Make sure the note accurately reflects the reminder or information you want to display. For example, the note might read "Verify/update patient insurance."



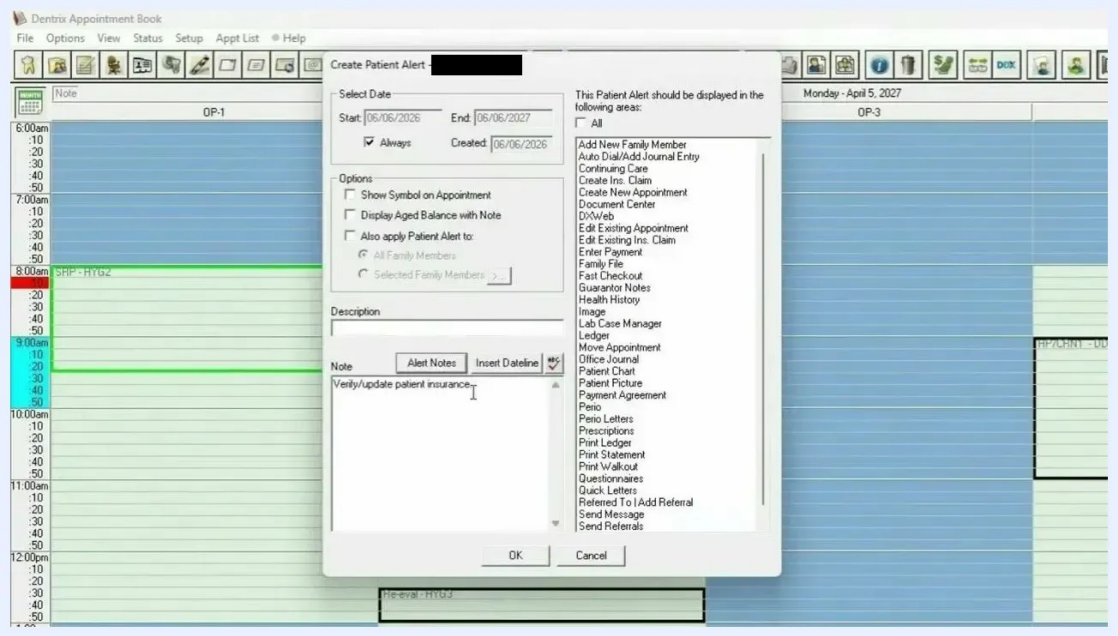
Create Patient Alert window with "Verify/update patient insurance." entered in the Note field

Step 8: Select where the alert displays

On the right side, under "This Patient Alert should be displayed in the following areas," choose where the alert appears.

- Check **All** to display the alert in every listed module. This is not recommended for most alerts.
- Select only the relevant modules instead, such as Family File, Edit Existing Appointment, or Patient Chart.

If too many pop-ups are enabled, staff may start to ignore them, so be as specific as possible.



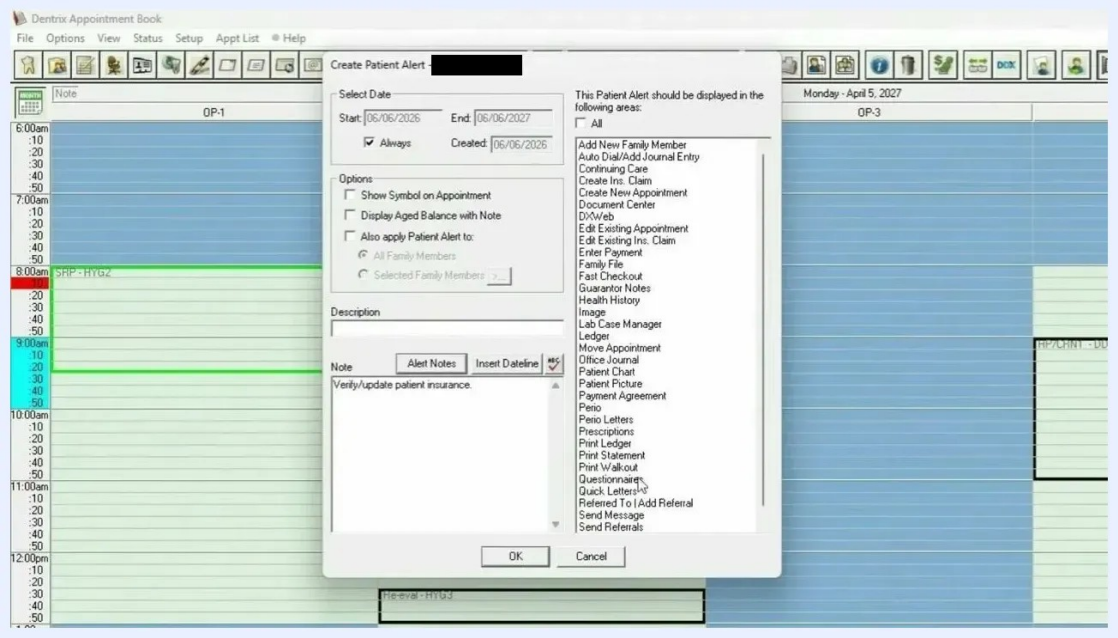
Create Patient Alert window with all display areas selected in blue, illustrating the risk of alert fatigue

Step 9: Save the patient alert

After you configure all options and verify the note and display locations, click **OK** to save the alert. The alert is now attached to the patient, and to the selected family members if you chose any. It displays in the modules you specified.

Step 10: Recognize an alert on an appointment

A small flag icon on an appointment in the Dentrix Appointment Book indicates that a pop-up patient alert is attached. When you open an appointment with an alert, a pop-up window displays the alert note (for example, "Verify/update patient insurance").



Dentrix Appointment Book with a patient alert pop-up showing "Verify/update patient insurance" and the Do Not Show This Alert Again Today option

Step 11: Suppress an alert for the rest of the day

In the alert pop-up, check **Do Not Show This Alert Again Today** if you do not want the alert to appear again for the rest of the day. This is useful after you have addressed the alert and do not need more reminders until the next day.

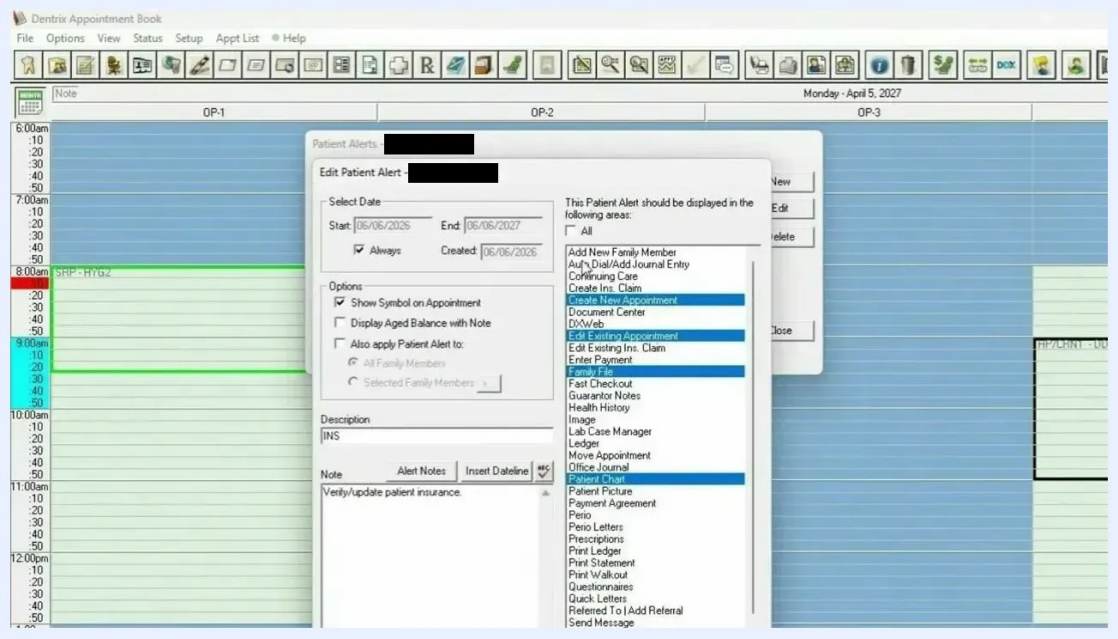
If the alert is set to **Always**, it continues to pop up on future days unless you set an end date.

Step 12: Edit or delete an existing patient alert

To update or remove an alert, return to the **Patient Alerts** window for the patient.

1. Select the alert you want to change from the list (for example, Description: INS).
2. Click **Edit** to change the alert note, dates, or display locations.

3. Or click **Delete** to permanently remove the alert. A confirmation dialog asks if you want to continue.
4. Click **Yes** to confirm the deletion.



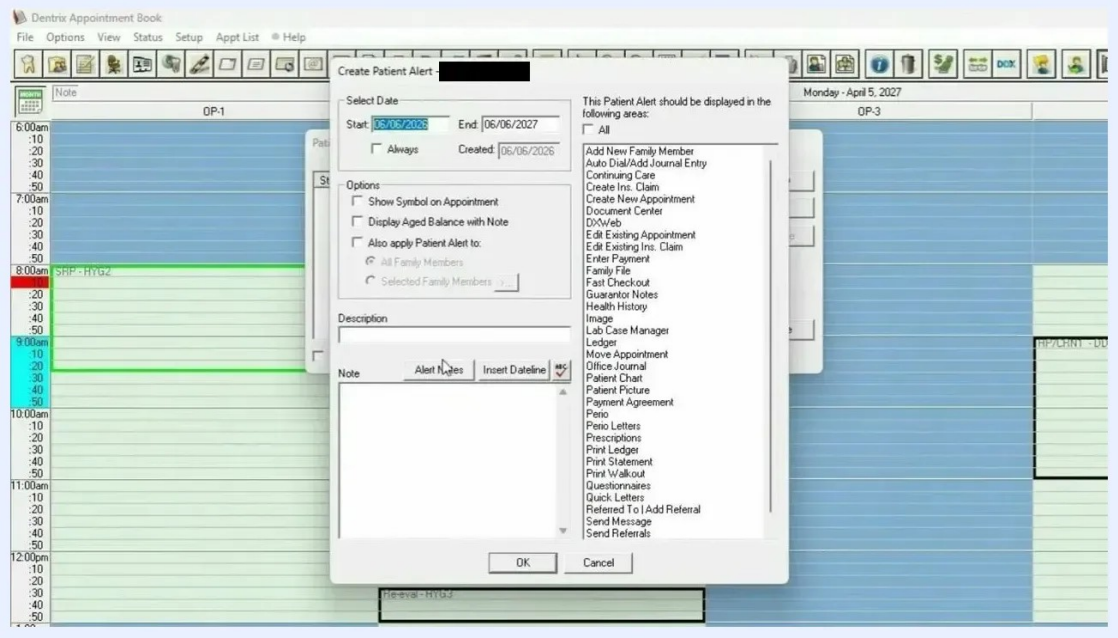
Patient Alerts window with a selected alert and the Edit Patient Alert dialog open for changes

Step 13: Manage alert note templates

Use the Alert Notes setup to speed up adding common alert notes.

1. Open **Office Manager** from the Dentrix main toolbar.
2. Go to **Maintenance > Practice Setup > Custom Notes > Alert Notes Setup**.
3. In the **Alert Notes Definitions** window, view, add, change, or delete frequently used templates (for example, "Verify/update patient insurance" or "Apply Senior Discount").

4. Select a template to edit or delete it, or click **Add** to create a new one.



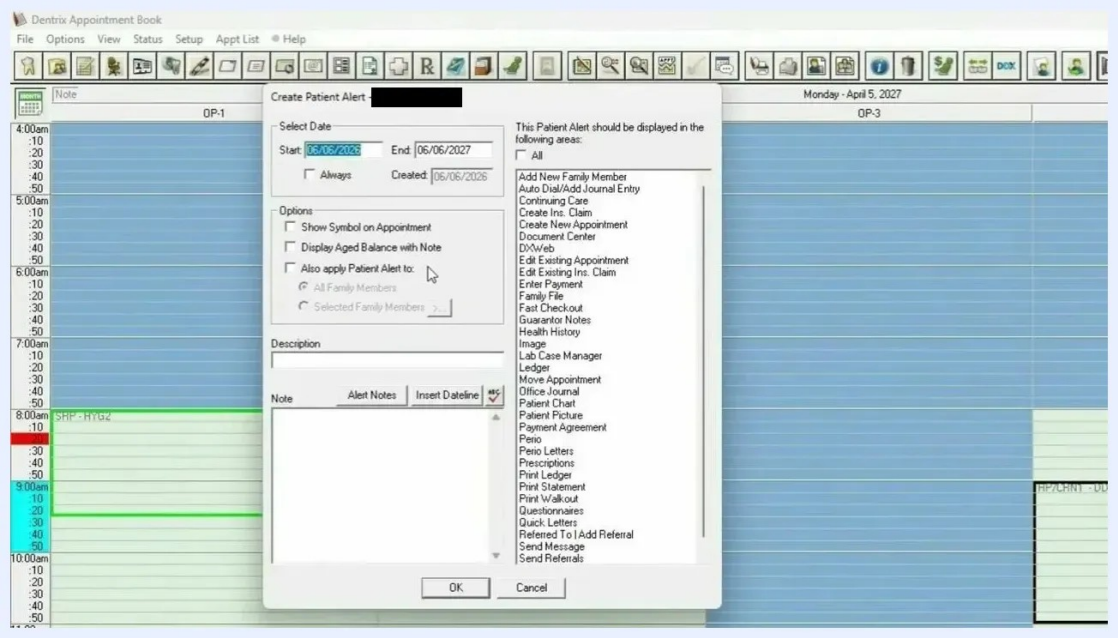
Alert Notes Definitions window in Office Manager listing templates such as "Apply Senior Discount" and "Verify/update patient insurance"

Related: Health History alerts

Health History alerts pop up to notify you of important patient information, such as allergies (for example, "allergic to amoxicillin") or required pre-medications. They appear in relevant modules so critical information is not missed.

Open the Health History module

In the Appointment Book, click the **Health History** icon in the toolbar. This opens the Health History module for the selected patient.



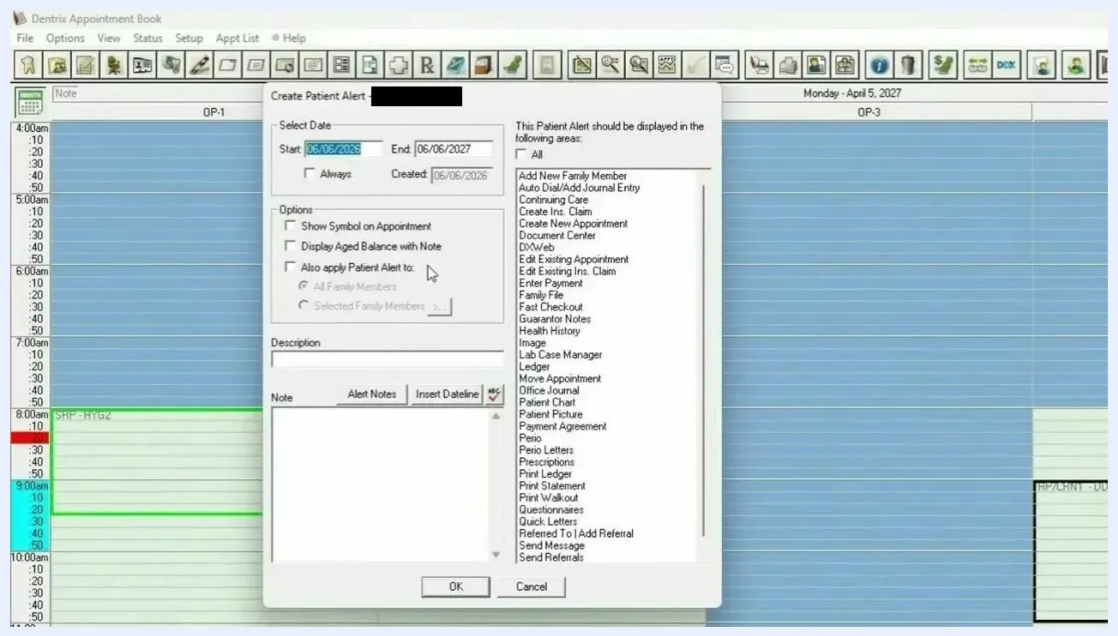
Dentrix Appointment Book with the Health History icon highlighted and patient appointments visible

Review conditions, allergies, and medications

In the Health History window, review these sections:

- Medical Conditions
- Allergies
- Patient Reported Medications

Each section is a table with these columns: Description, Status, Reported Date, Inactivated Date, Pop-up, Critical, and Note.



Health History module showing empty tables for Medical Conditions, Allergies, and Patient Reported Medications

Best practices for patient alerts

- Use pop-up alerts for important reminders, such as updating health history, verifying insurance information, or noting patient preferences (for example, preferred provider or hygienist).
- Avoid overusing pop-up alerts, because too many can lead to staff ignoring them.
- Review and update alerts regularly so only relevant information is displayed.

Summary

You now know how to create patient alerts in Dentrix. You can set dates, apply alerts to family members, write notes from templates, and choose where each alert displays. You can also suppress, edit, or delete alerts as needed. Specific alerts keep important information visible to the right staff at the right time, without overwhelming them with unnecessary pop-ups.

What's next

- Create or update alert note templates in **Alert Notes Setup** for the reminders your office uses most.
- Review existing patient alerts and remove or edit any that are no longer relevant.
- Check the Health History module for patients who need allergy or medical condition pop-ups.