How to schedule appointments in Dentrix for existing patients

This guide shows you how to schedule appointments in Dentrix for an existing patient. You start in the Appointment Book, attach procedure codes, set the provider and appointment details, and save. You then schedule the patient's next re-care visit and use the Pinboard and the Find feature to locate an open time.

Prerequisites

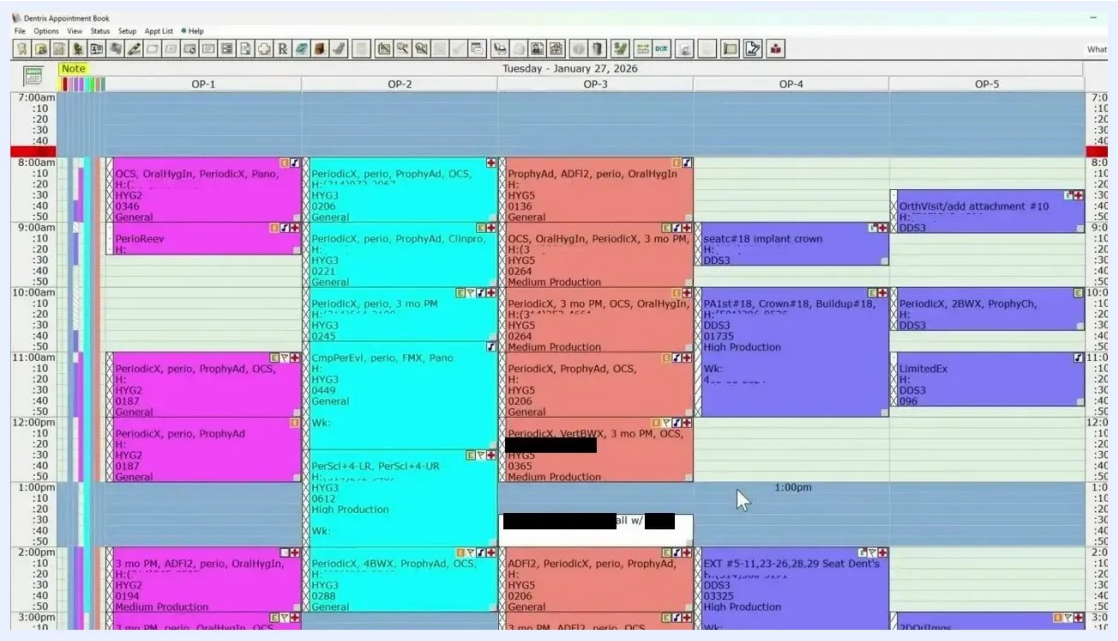
Before you begin, make sure you have the following:

- Access to the Dentrix Appointment Book module.
- An existing patient to schedule.
- Perfect Day Scheduling set up, if you want to search by time block (optional).

Open the Appointment Book and start the appointment

1. Open the Appointment Book to schedule appointments in Dentrix

Make sure you are in the Dentrix Appointment Book module. The Appointment Book displays the daily schedule for all operatories (OPs) and providers.



Dentrix Appointment Book showing several operatories, time slots, and scheduled appointments in different colors

2. Find an open time slot and select the patient

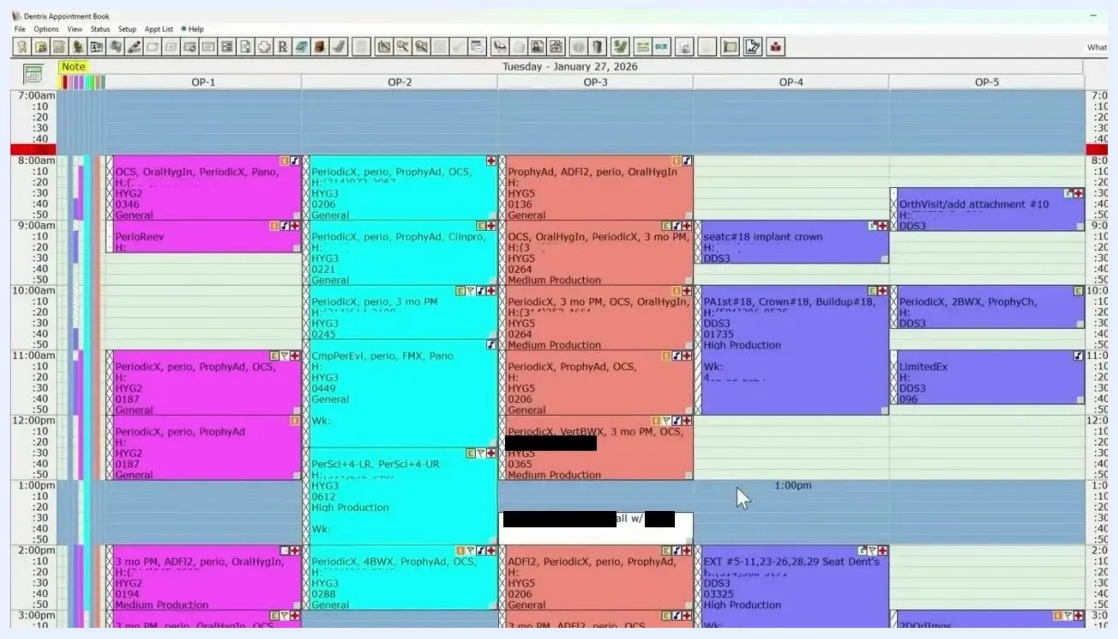
Scan the schedule for an empty time slot that fits the patient's needs. Double-click the open slot to begin scheduling.

A patient selection dialog appears. Search for and select the existing patient you are scheduling.

3. Open the Appointment Information box

After you select the patient, the Appointment Information box appears. You enter all appointment details here, and the patient's name is shown at the top of the window.

The window displays fields for Provider, Continuing Care, Exam, Reason, Appointment Description, Amount, Status, Schedule, Type, Date, Time, Staff, and Notes.



Appointment Information box open, showing fields for Provider, Additional Provider, Reason, Appointment Description, and more

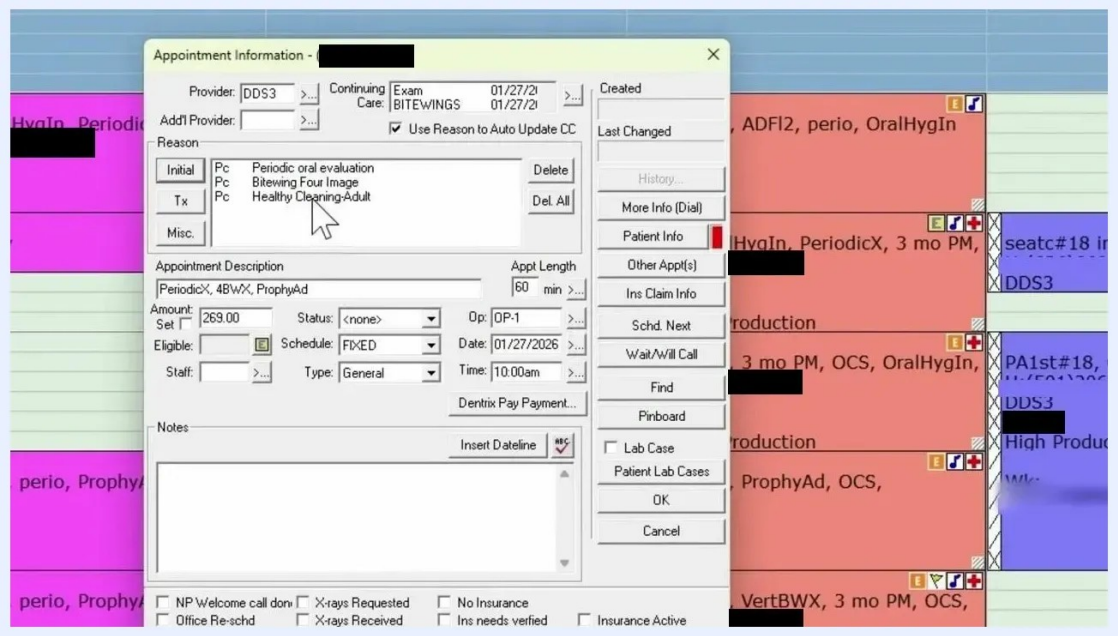
Attach procedure codes

4. Attach procedure codes using initial reasons

Click the **Initial** button in the Appointment Information box. In the **Select Initial Reasons** dialog, choose the reasons that apply to the appointment. Common options include:

- Periodic Exam
- Bite Wings
- Prophy (cleaning)
- FMX, Limited Exam, Perio Chart, and others

Select all applicable reasons for the patient (for example, "Periodic Ex," "4 BWX," and "Prophy-Adult"). Then click **OK**.



Select Initial Reasons dialog open over the Appointment Information window, listing options such as Periodic Ex, Limited Exam, Prophy-Adult, and FMX

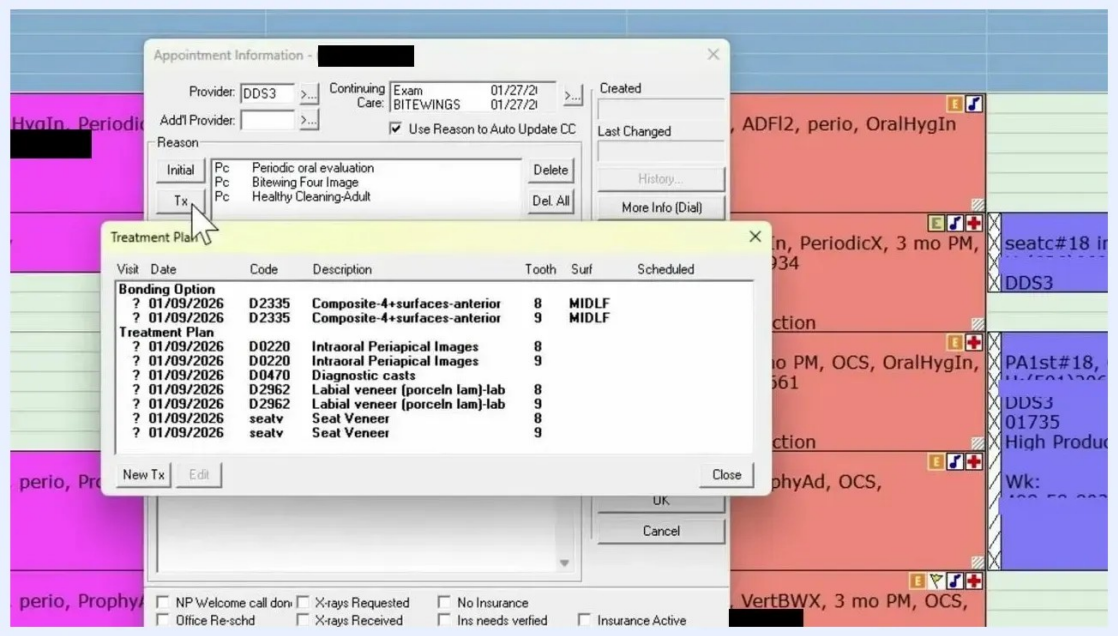
The selected procedures attach to the appointment and may also update the patient's continuing care type. If prompted, click **Yes** to confirm attaching procedures to continuing care.

5. Attach procedure codes from the treatment plan

If the patient has a treatment plan, click the **Tx** (Treatment) button in the Appointment Information box. The **Treatment Plan** dialog lists all planned procedures with the following details:

- Date
- ADA Code
- Description
- Tooth number
- Surface

Select the procedures the patient is coming in for. Click **Close** to add them to the appointment.



Treatment Plan dialog open over the Appointment Information window, listing planned procedures such as Composite-4+surfaces-anterior, Intraoral Periapical Images, Diagnostic casts, Labial veneer, and Seat Veneer

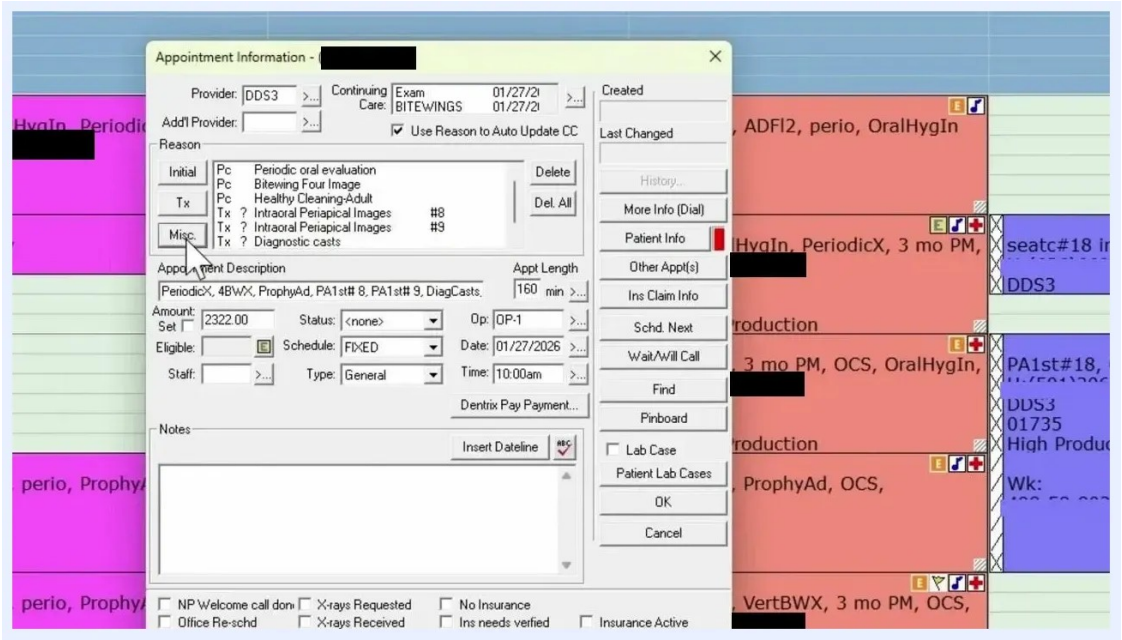
6. Attach miscellaneous procedure codes

For procedures not covered by Initial Reasons or the Treatment Plan, click the **Misc.** button. The **Select Procedure Code** dialog opens and displays all dental codes.

You can find a code in either of two ways:

- Use the **Category** list on the left to filter codes (for example, Diagnostic, Preventive, or Restorative).
- Type a keyword (for example, "crown") in the **search bar** at the top.

Select the procedure codes you need and click **OK** to add them to the appointment.



Select Procedure Code dialog showing categories, ADA codes, and a search for "crown" with matching results

7. Review the appointment description

After you add procedure codes, review the **Appointment Description** field. It populates automatically with the selected procedures (for example, "PeriodicX, 4BWX, ProphyAd, PA1st#8, PA1st#9, DiagCasts").

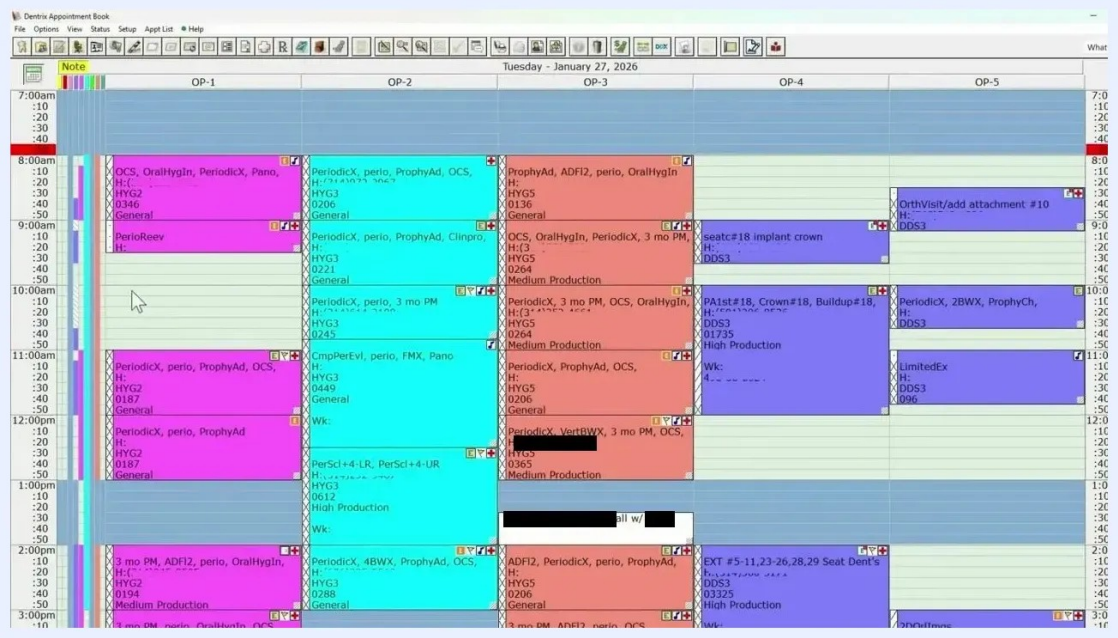
You can edit this field to simplify or clarify it, for example to "Exam and Prophy." However, Dentrix may automatically reset an edited description to the original procedure codes.

Tip: Add special instructions in the **Notes** section at the bottom of the window, not in the Appointment Description.

Set providers and appointment details

8. Set the provider

The **Provider** field defaults to the patient's primary provider. If the appointment is for hygiene or another provider, click the arrow next to the Provider field. In the Select Provider dialog, choose the appropriate provider (for example, DDS3 or HYG2) and click **OK**.



Select Provider dialog listing providers with their ID, Name, Title, and Status

Tip: Set the appointment reason before you change the provider. The provider may reset based on the appointment type.

9. Add an additional provider (if needed)

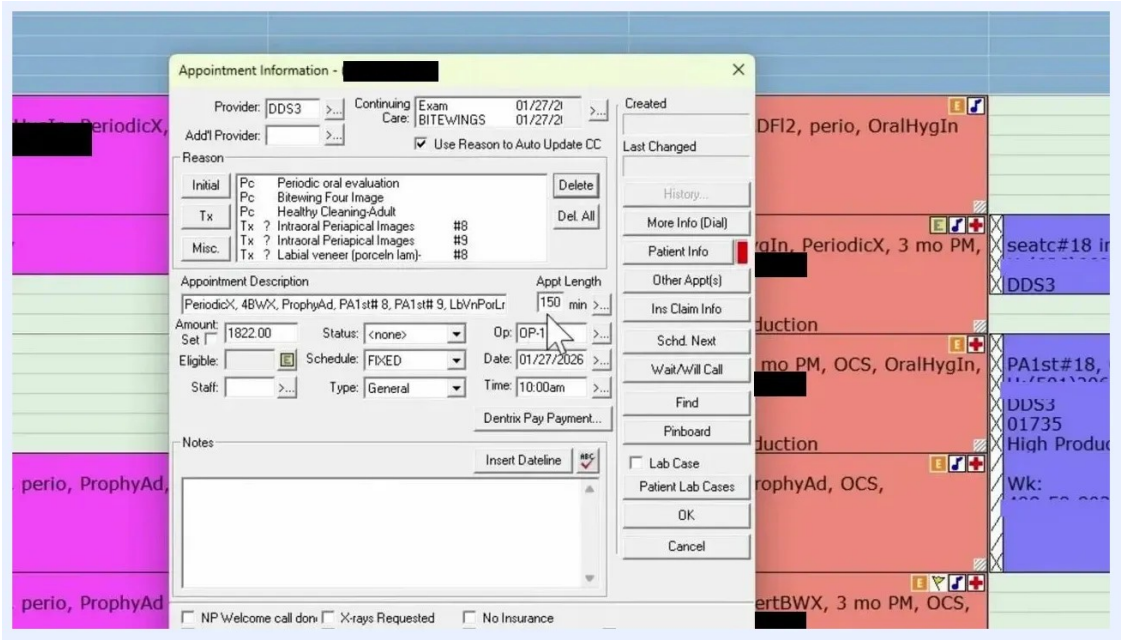
If the appointment requires an additional provider, such as a doctor exam during a hygiene visit, enter that provider in the **Add'l Provider** field.

10. Adjust the appointment length, amount, eligibility, and staff

The middle section of the Appointment Information window displays key appointment details. Review each of the following:

- **Appt Length:** Dentrix calculates the length in minutes from the attached procedure codes. You can edit the field manually, or click the arrow next to it to adjust the time incrementally.

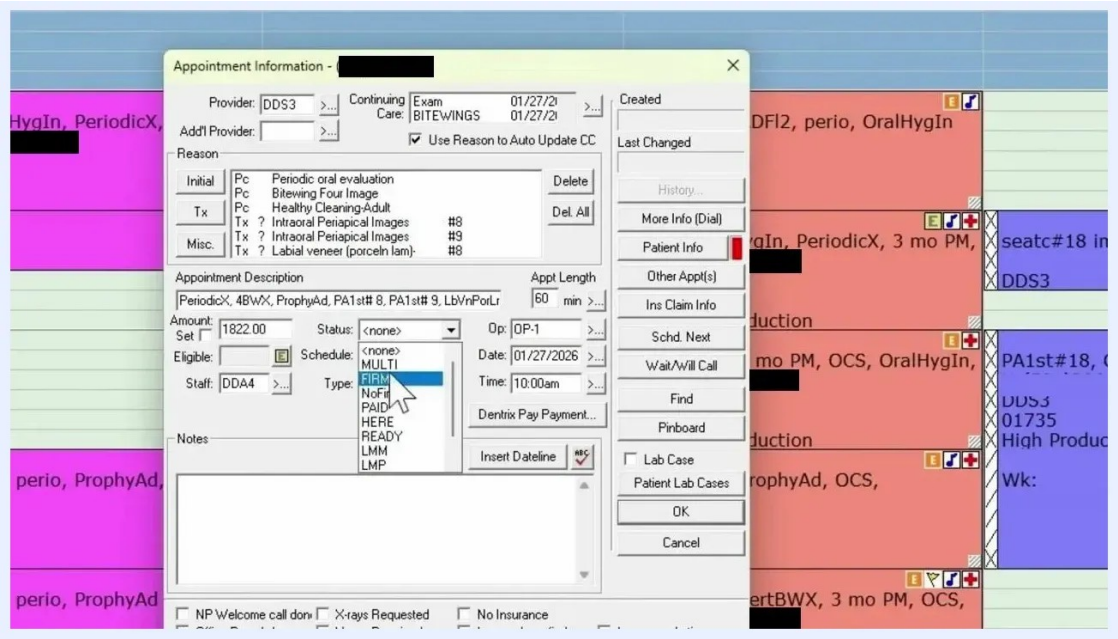
- **Amount:** This field shows the total dollar amount based on the fees attached to the selected procedures. It populates automatically, and you can review it for accuracy.
- **Eligible:** If your office uses Dentrix eligibility features, click this button to check insurance eligibility for the appointment type.
- **Staff:** Click this field to assign a staff member, such as the person who scheduled the appointment. This is optional.



Appointment Information window with the Appt Length field highlighted and editable, showing 150 min being changed to 60 min

11. Set the appointment status

Use the **Status** dropdown to mark the appointment as confirmed, here, ready, paid, or another status. Status options are customizable for your office. Select the appropriate status, such as "FIRM," "HERE," "READY," "DNA'd," or "<COMP>."



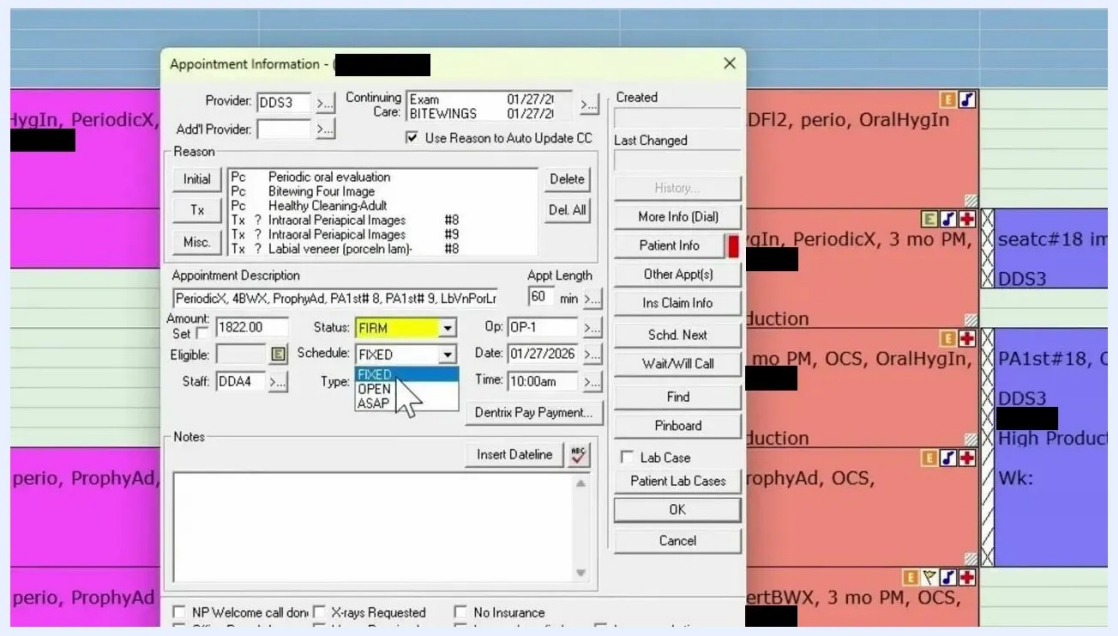
Status dropdown open in the Appointment Information window, showing FIRM, HERE, READY, DNA'd, and <COMP>

12. Choose the schedule type

The **Schedule** dropdown determines how the appointment appears on your lists:

- **FIXED:** The appointment is set for a specific time.
- **OPEN:** The appointment is available for rescheduling.
- **ASAP:** The appointment is added to your ASAP list for quick filling.

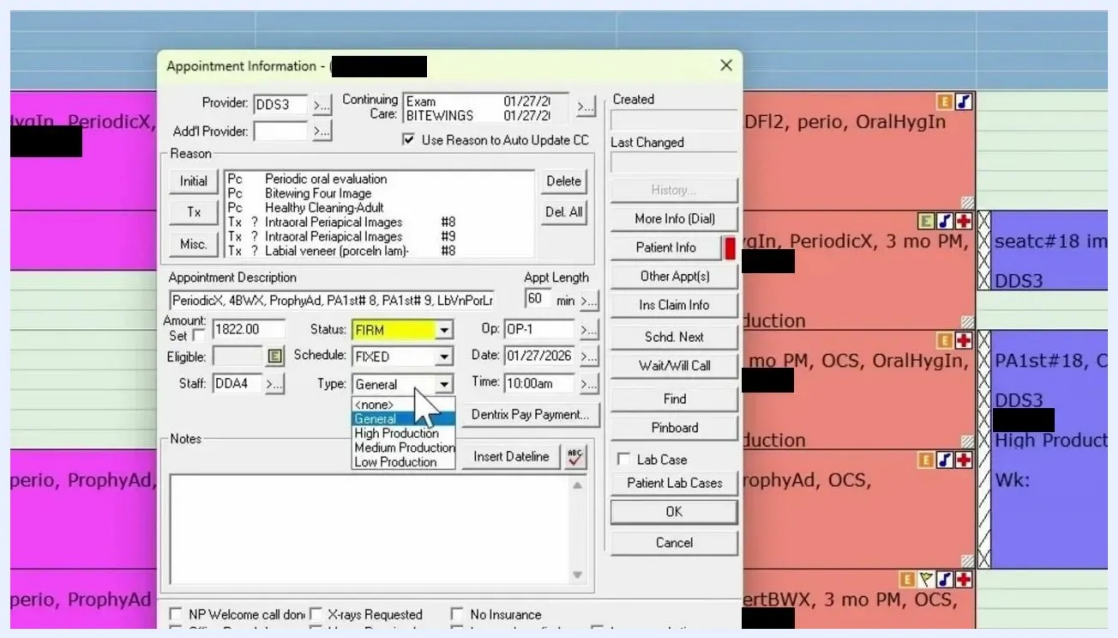
Select the appropriate schedule type for the appointment.



Schedule dropdown open in the Appointment Information window, showing FIXED, OPEN, and ASAP

13. Choose the appointment type

Click the **Type** dropdown and select one of the following options: **General**, **High Production**, **Medium Production**, or **Low Production**. If your office uses production types, select the appropriate one here.



Type dropdown open in the Appointment Information window, showing General, High Production, Medium Production, and Low Production

14. Confirm the date, time, and operatory

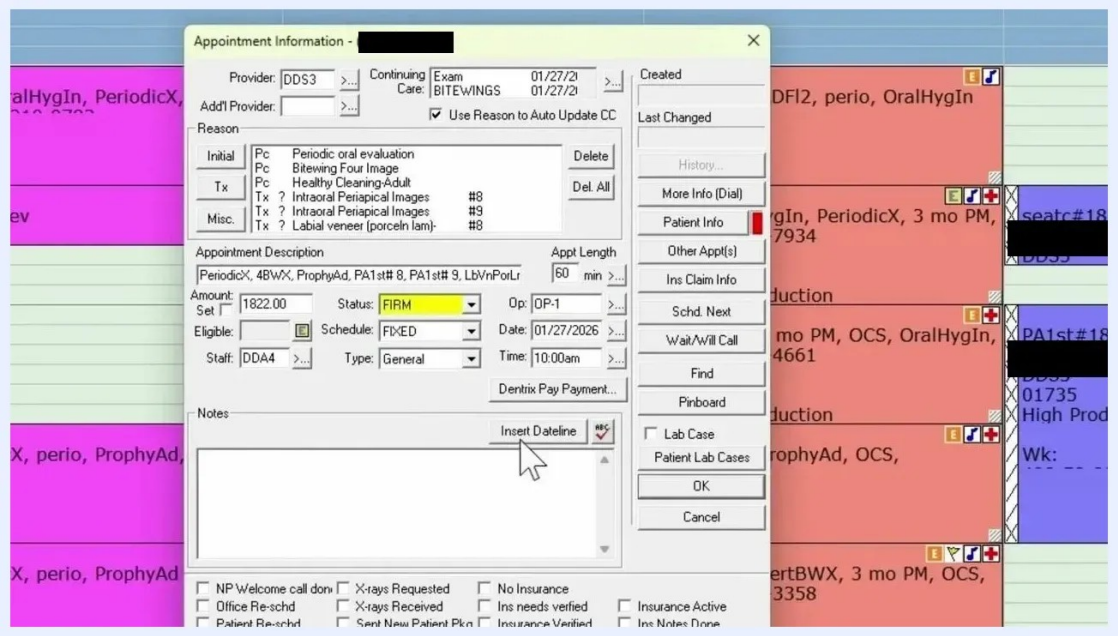
Review the **Date**, **Time**, and **Op** (operatory) fields and adjust them as needed. In this example, the values are:

- **Date:** 01/27/2026
- **Time:** 10:00am
- **Op:** OP-1

15. Add notes to the appointment

In the **Notes** section at the bottom of the window, click **Insert Dateline** to add the current date automatically (for example, ". Fri - Jan 16, 2026 -"). Then type any additional notes about the appointment.

Notes keep important details visible to staff without the risk of an automatic reset in the Appointment Description.

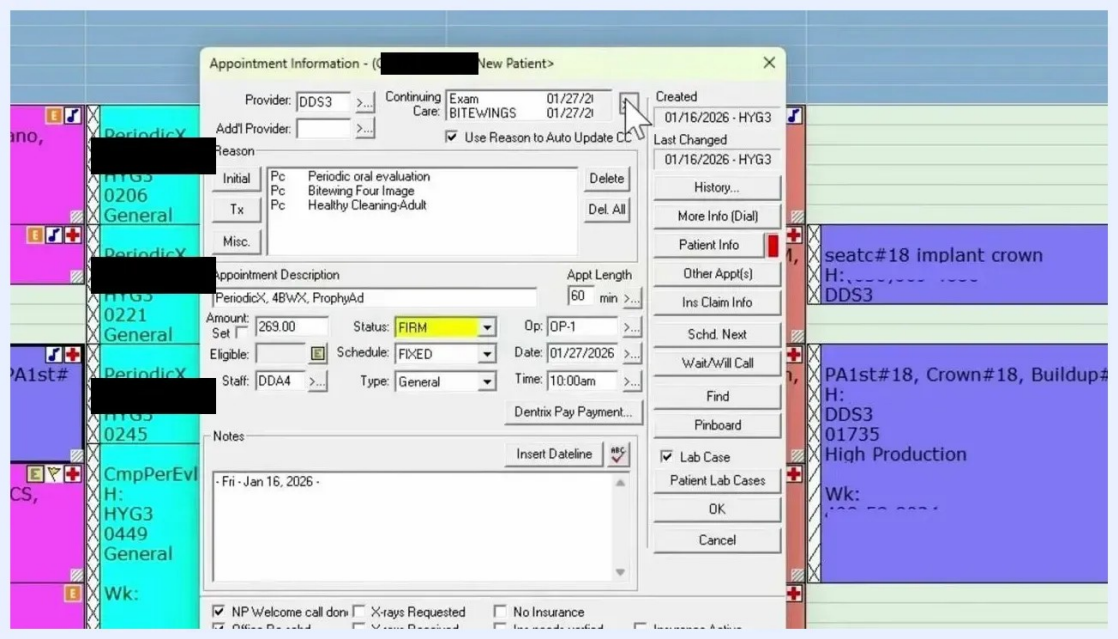


Appointment Information window with a dated note inserted and the Insert Dateline button highlighted

Review continuing care

16. Check selected items with the Continuing Care arrow

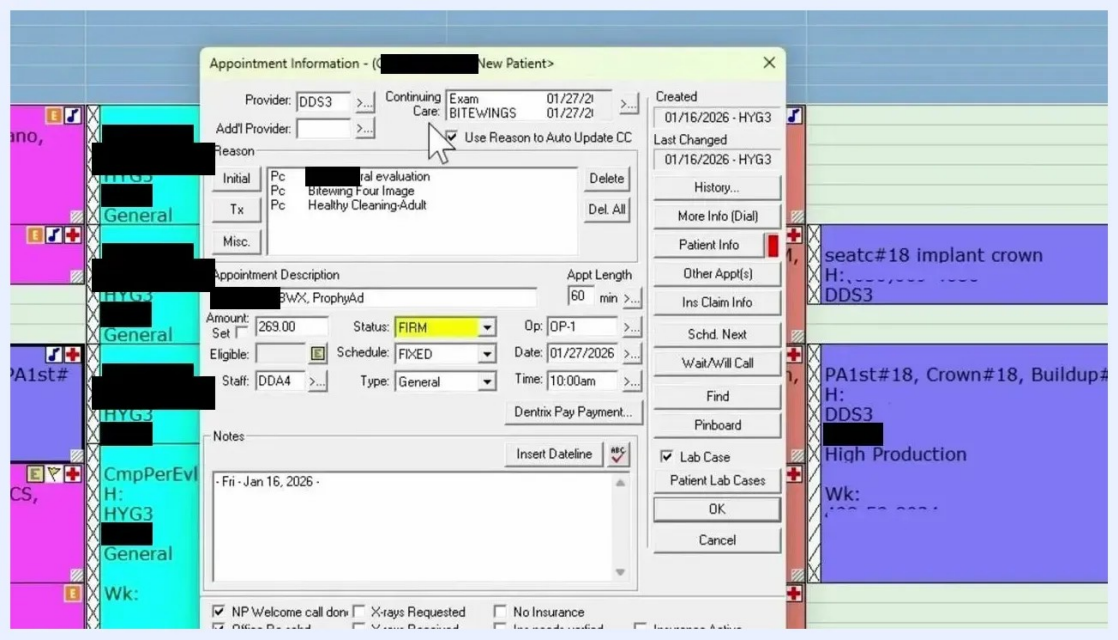
Use the arrow next to the Continuing Care section to view which items are currently highlighted and selected for this appointment. This helps you verify that all necessary continuing care procedures are included.



Appointment Information window with the Continuing Care arrow highlighted, used to review selected continuing care items

17. Match continuing care to the scheduled procedures

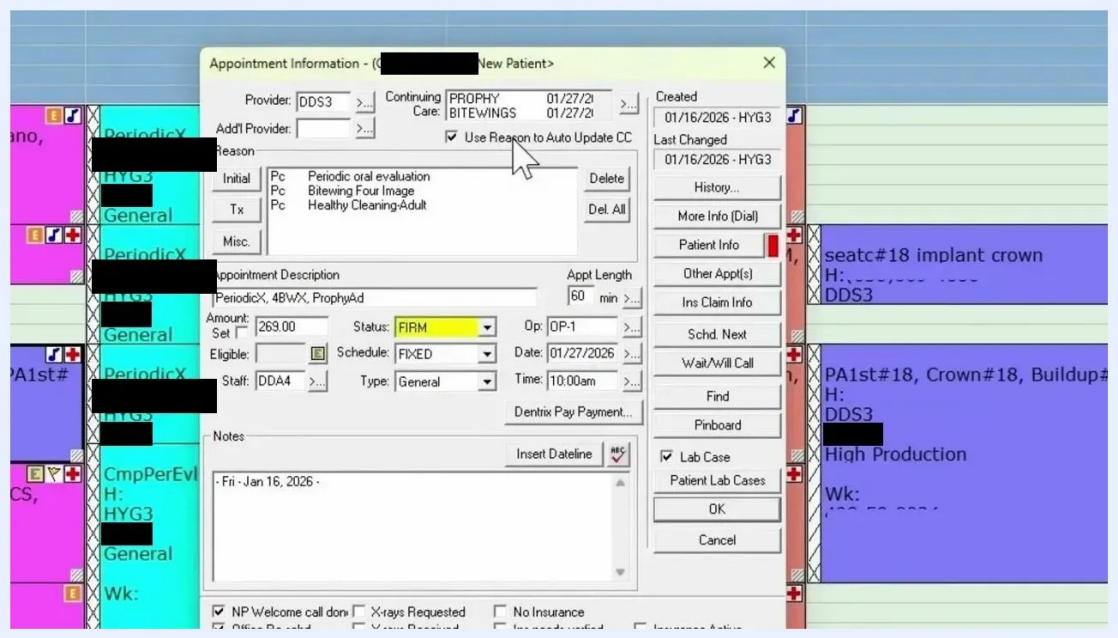
The **Continuing Care** section at the top of the Appointment Information window must match the procedures scheduled for the appointment. List any maintenance or continuing care procedures, such as prophy, bitewings, or exams, in this section. This ensures all continuing care items are tracked and updated.



Cursor pointing to the Continuing Care section, showing how scheduled procedures link to continuing care tracking

18. Enable automatic continuing care updates

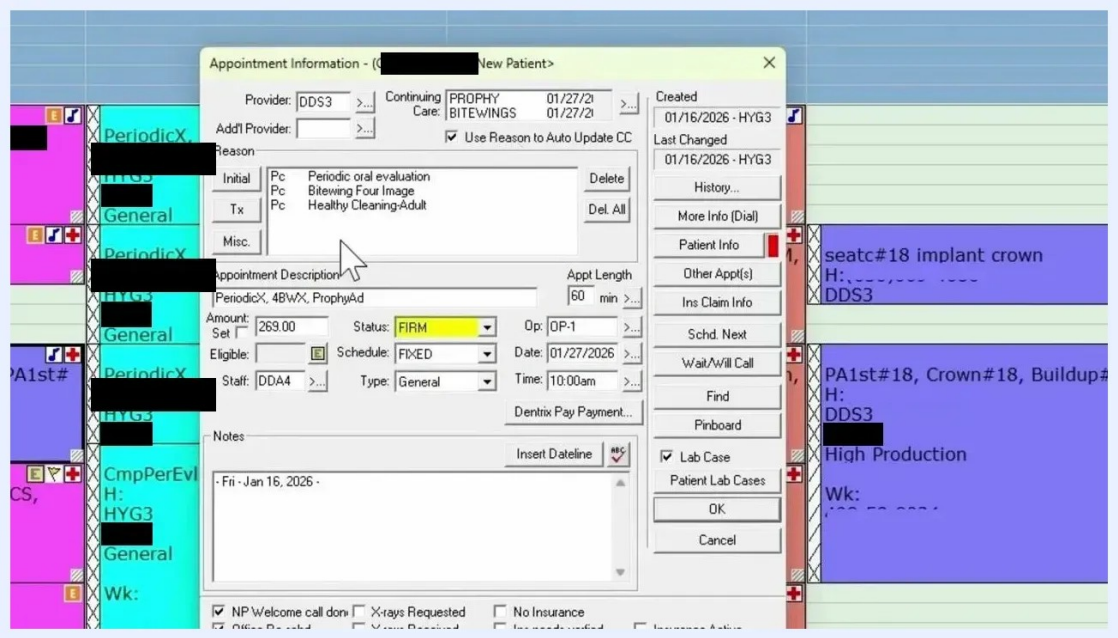
Select the **Use Reason to Auto Update CC** check box. Dentrix then updates the patient's continuing care status automatically based on the scheduled procedures, so the record stays current without manual intervention.



Use Reason to Auto Update CC check box selected in the Appointment Information window

19. Verify the Continuing Care box

Double-check that every procedure scheduled for the appointment is also listed in the Continuing Care section. This step is crucial for accurate maintenance tracking and recall management.



Continuing Care section populated with Use Reason to Auto Update CC selected, confirming all scheduled procedures are included

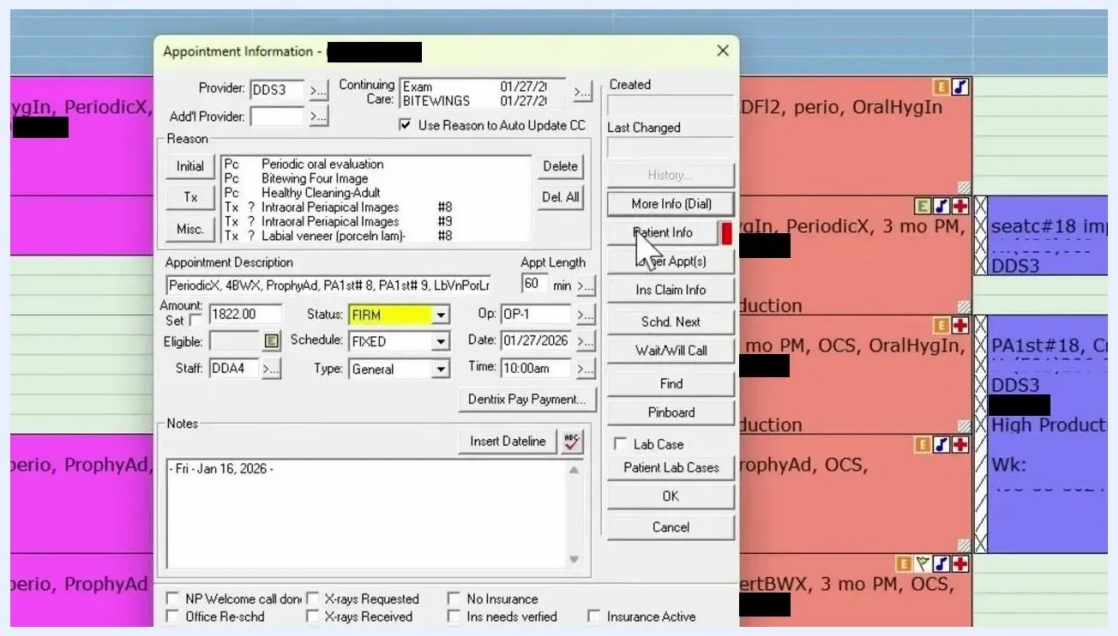
Use additional appointment tools

20. Access additional patient and appointment information

Use the buttons on the right side of the Appointment Information window:

- Click **More Info (Dial)** to view more details about the patient.
- Click **Patient Info** to open the patient's family file.
- Click **Other Appt(s)** to view other appointments for this patient.

- Click **Ins Claim Info** to view insurance claim information related to this appointment.



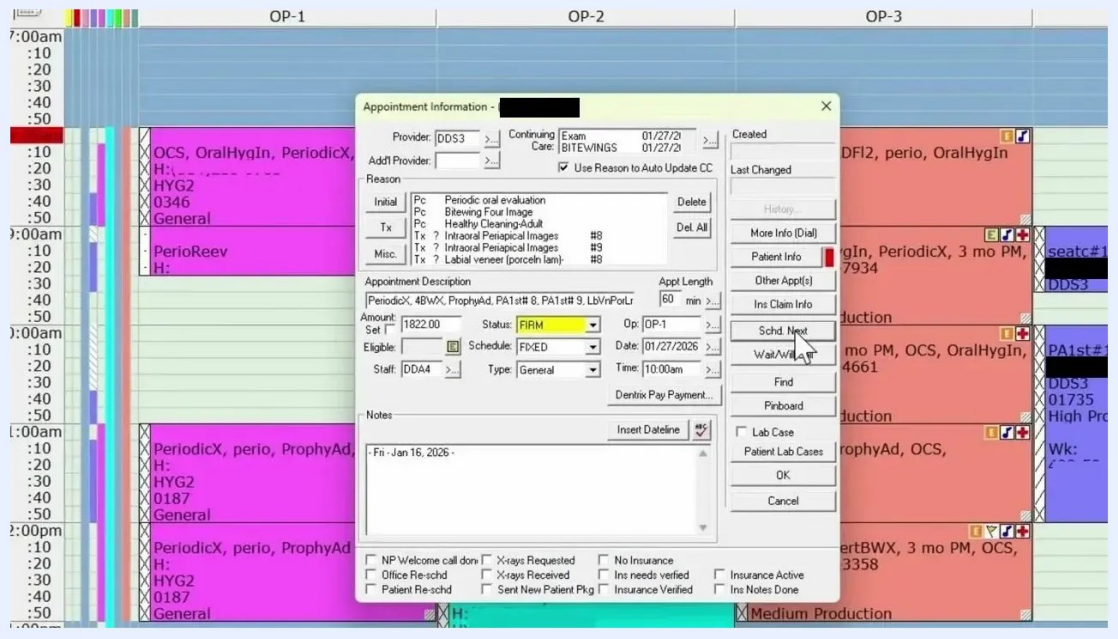
Right-side action buttons in the Appointment Information window: More Info (Dial), Patient Info, Other Appt(s), and Ins Claim Info

21. Schedule another appointment or move the appointment to the unscheduled list

You have two options:

- Click **Schd. Next** to open another appointment screen and book an additional future appointment for the patient.

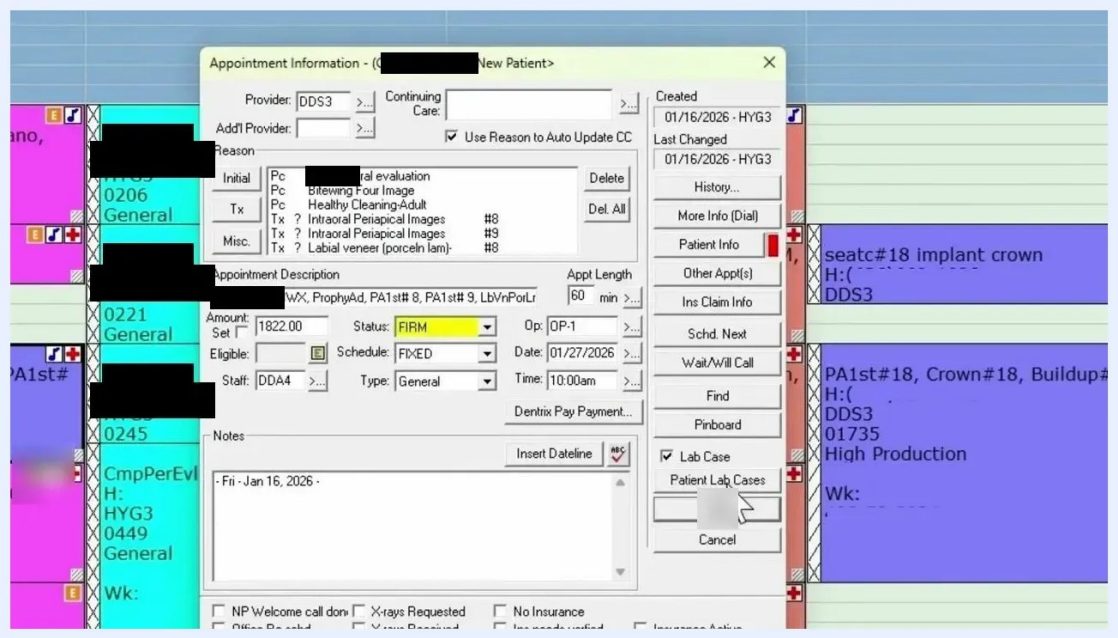
- Click **Wait/Will Call** to move the current appointment to the unscheduled list. This removes the appointment from the schedule and indicates that the office will contact the patient to reschedule.



Cursor pointing to the Schd. Next and Wait/Will Call buttons in the Appointment Information window

22. Manage lab cases for the appointment

If the appointment involves lab work, select the **Lab Case** check box. Click **Patient Lab Cases** to view all lab cases associated with the patient. These options help you track and manage lab work for the appointment.



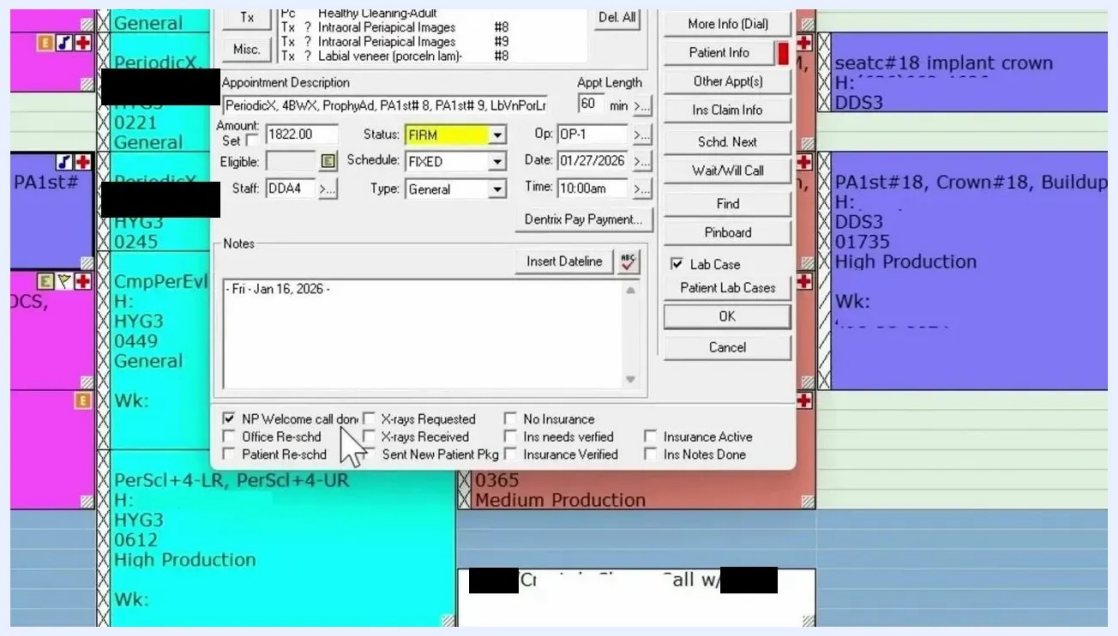
Lab Case check box selected with the cursor pointing to Patient Lab Cases

23. Track appointment-related tasks and statuses

At the bottom of the Appointment Information window, use the check boxes to document specific actions or statuses:

- **NP Welcome call done**
- **Office Re-schd**
- **Patient Re-schd**
- **X-rays Requested**
- **X-rays Received**
- **Sent New Patient Pkg**
- **No Insurance**
- **Ins needs verified**
- **Insurance Verified**
- **Insurance Active**
- **Ins Notes Done**

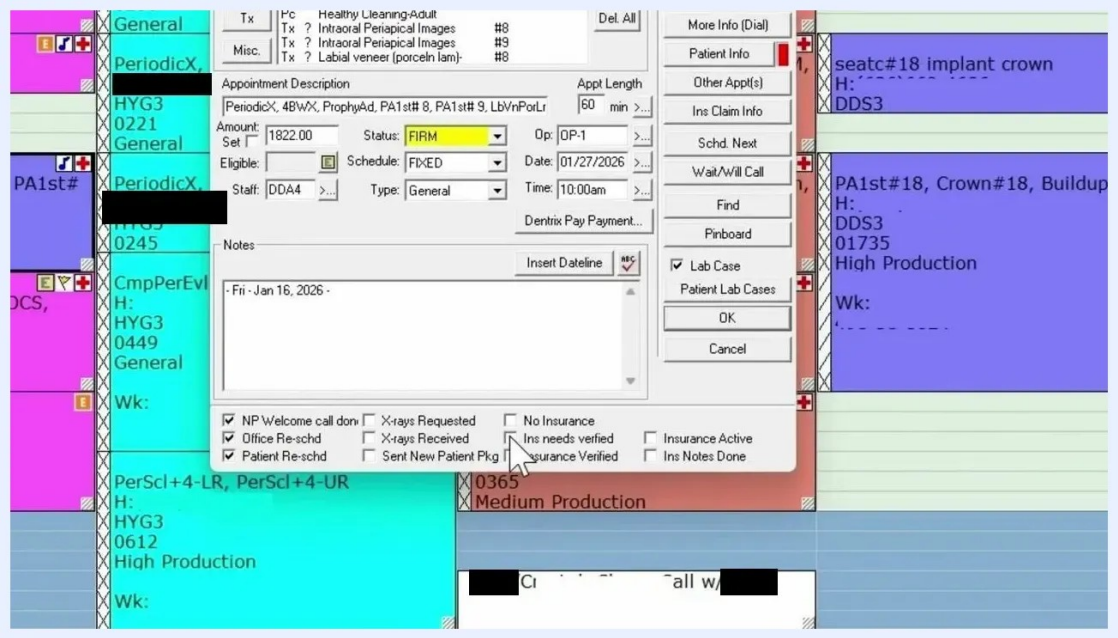
Select the boxes that show what has been completed or is required for this appointment.



Lower section of the Appointment Information window showing the task and status check boxes, with the cursor pointing to Office Re-schd

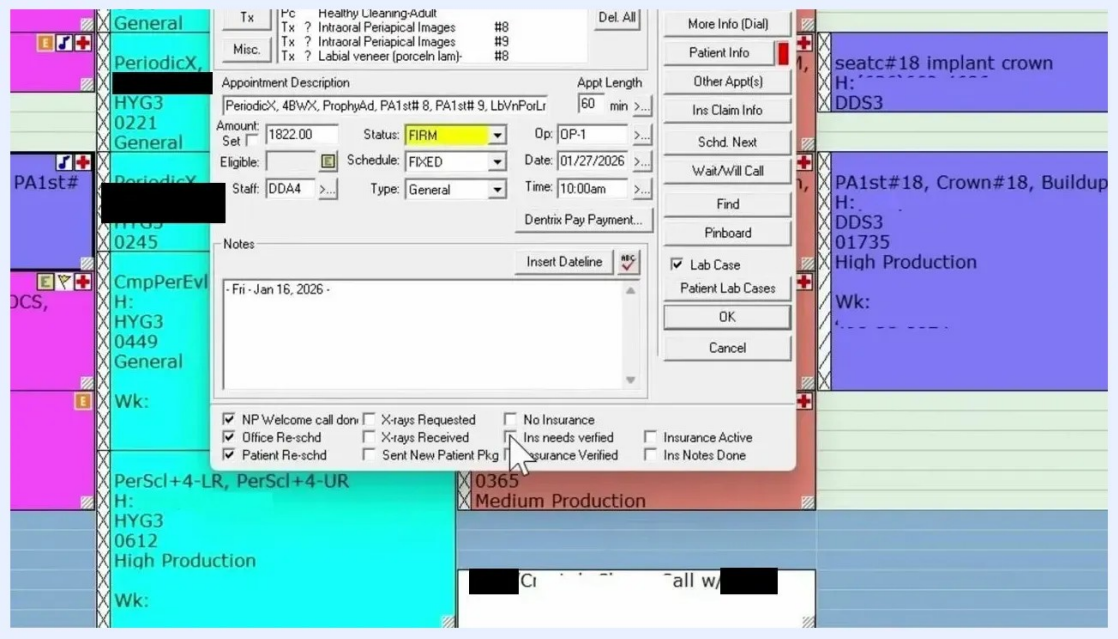
24. Customize the check boxes for your office workflow

You can customize these check boxes to flag items that matter to your office. For example, you can add a check box labeled "Needs Health History Update" and select it when it applies to a patient.



Cursor pointing to customizable check boxes such as No Insurance and Ins needs verified

When a check box like "Needs Health History Update" is selected, it is immediately visible to whoever checks the patient in. This helps ensure that actions such as updating the health history are not missed.



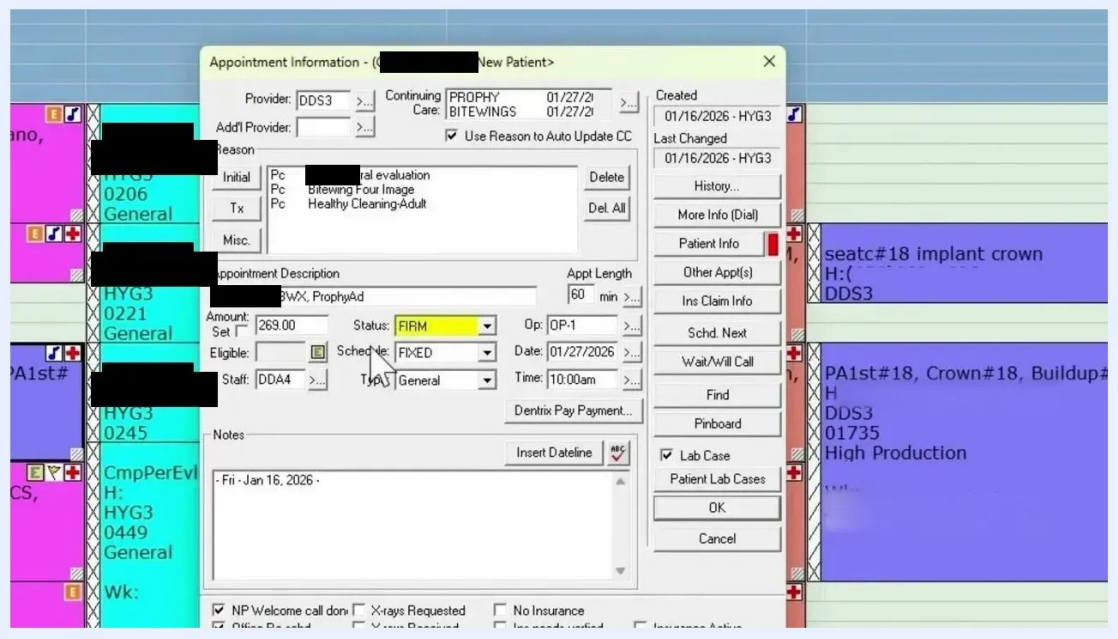
Cursor pointing to the customizable check boxes, which make flagged items visible to check-in staff

Save the appointment

25. Save the appointment and confirm it in the schedule grid

Click **OK** to save the appointment, or click **Cancel** to discard your changes.

After you save, the appointment block appears at the designated time and operatory. The schedule displays multiple colored blocks representing different appointments and providers.



Schedule grid with several colored appointment blocks, including the newly scheduled appointment at 10:00am for HYG2

Schedule the next re-care appointment

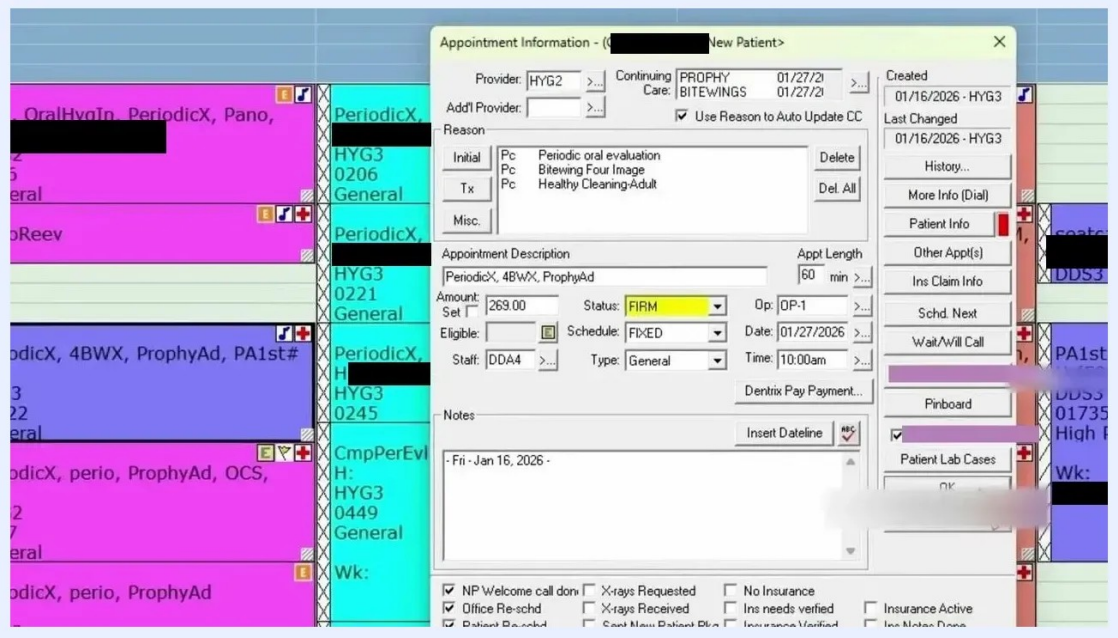
26. Schedule the next re-care appointment while the patient is present

To schedule how to book a patient's next re-care appointment (for example, six months later) while the patient is in the office, open the Appointment Information window for the patient. Enter the details for the next appointment. This example uses the following values:

- **Provider:** HYG3
- **Continuing Care:** PROPHY, Exam
- **Reason:** Periodic oral evaluation, Bitewing Four Image, Healthy Cleaning-Adult
- **Appointment Description:** PeriodicX, 4BWX, ProphyAd
- **Amount Set:** 269.00
- **Status:** (none)
- **Schedule:** FIXED
- **Staff:** as appropriate

- **Type:** General
- **Appointment Length:** 60 min
- **Operatory:** OP-2
- **Date:** 01/16/2026
- **Time:** 8:00am

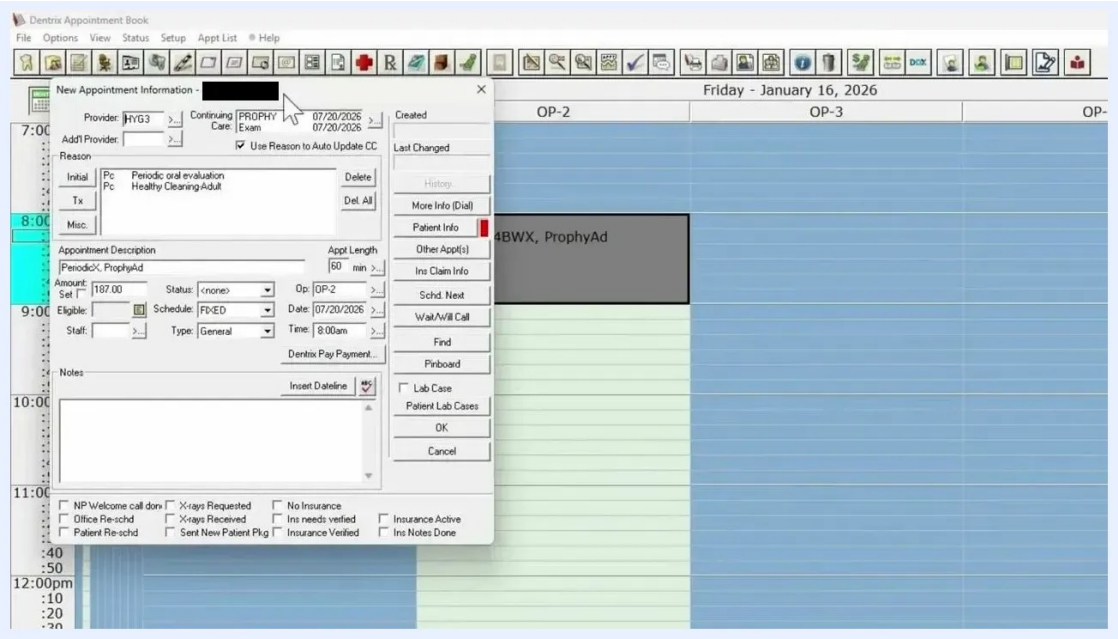
Click **OK** to save the appointment.



Appointment Information window filled in for a new re-care appointment, scheduled for 8:00am in OP-2

27. Decide whether to create a continuing care appointment

When prompted, a dialog box asks whether you want to create a continuing care appointment or a new one. Click **Yes** if you want Dentrix to determine the next appointment automatically from the patient's continuing care setup.

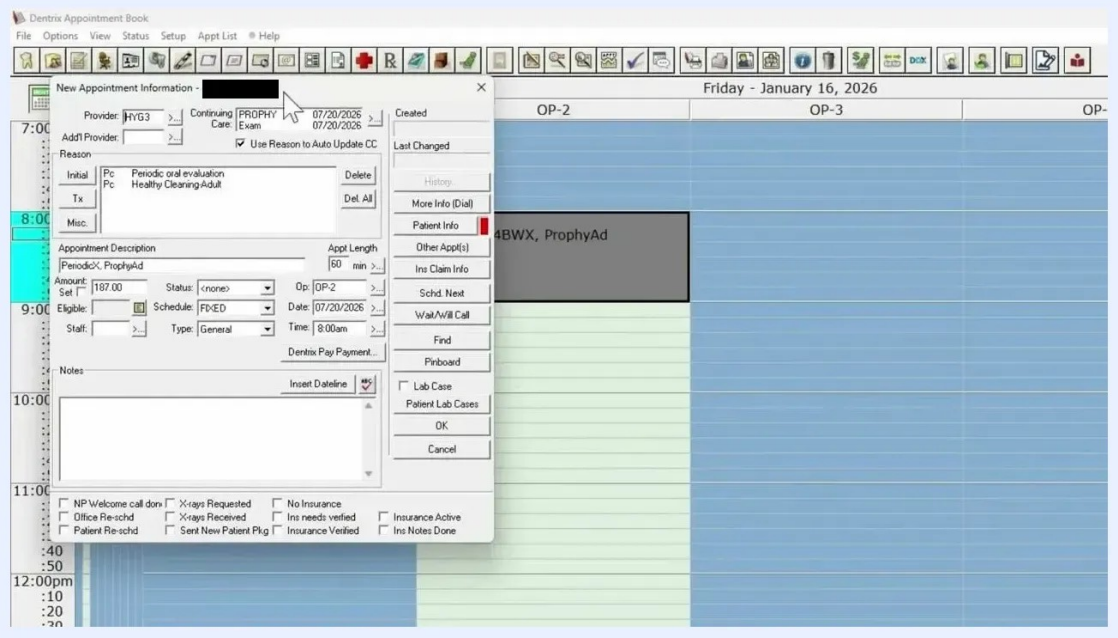


Set Appointment Procedures Complete dialog with patient and appointment information, a list of procedures, and the Post/Set Complete button highlighted

28. Verify the automatically populated details

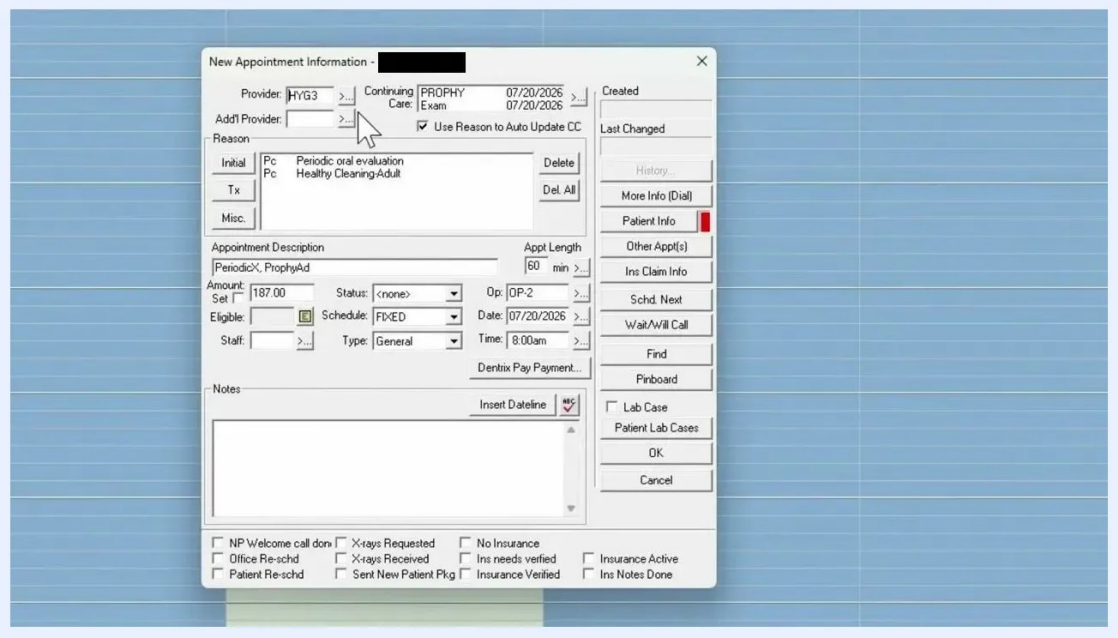
If you select **Yes**, Dentrix populates the next re-care appointment details. It uses the patient's continuing care settings to determine the interval and appointment type. For example, if the interval is six months, the next appointment date is six months from the current appointment.

Dentrix fills in the provider, care type, date, time, and operatory.



New Appointment Information window with automatically populated provider, continuing care, date, and time for the next re-care appointment

Confirm that the date matches the patient's continuing care interval, such as six months or one year ahead. Make sure all other fields (provider, care type, description, amount, and schedule) are accurate. If no manual corrections are needed, click **OK** to finalize the appointment.

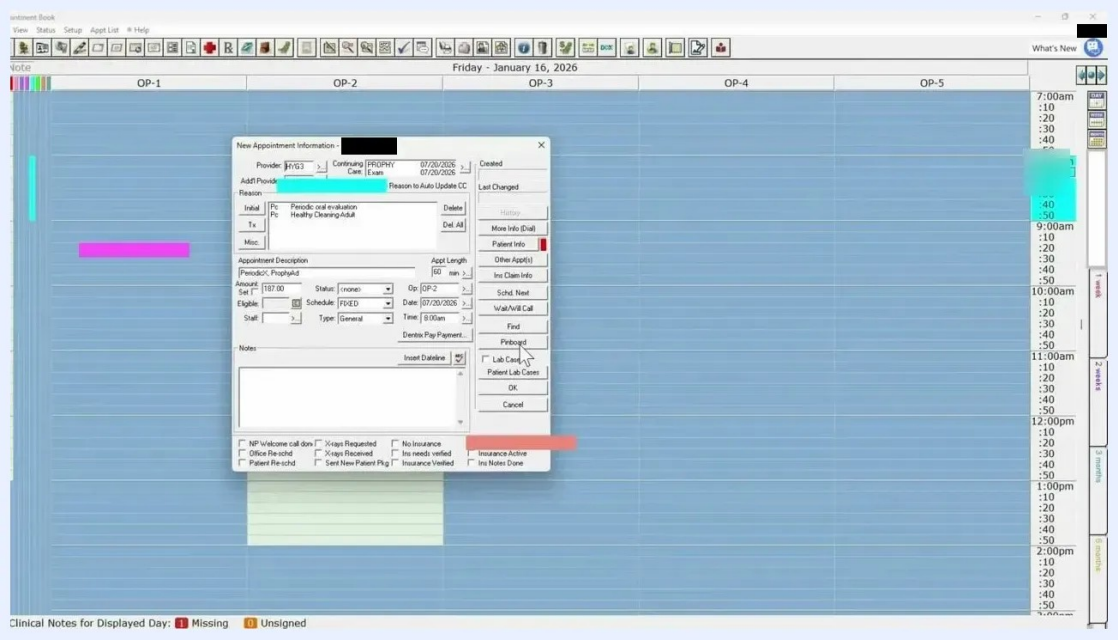


New Appointment Information window confirming all details are populated for the next re-care appointment

Use the Pinboard for flexible scheduling

29. Place the appointment on the Pinboard

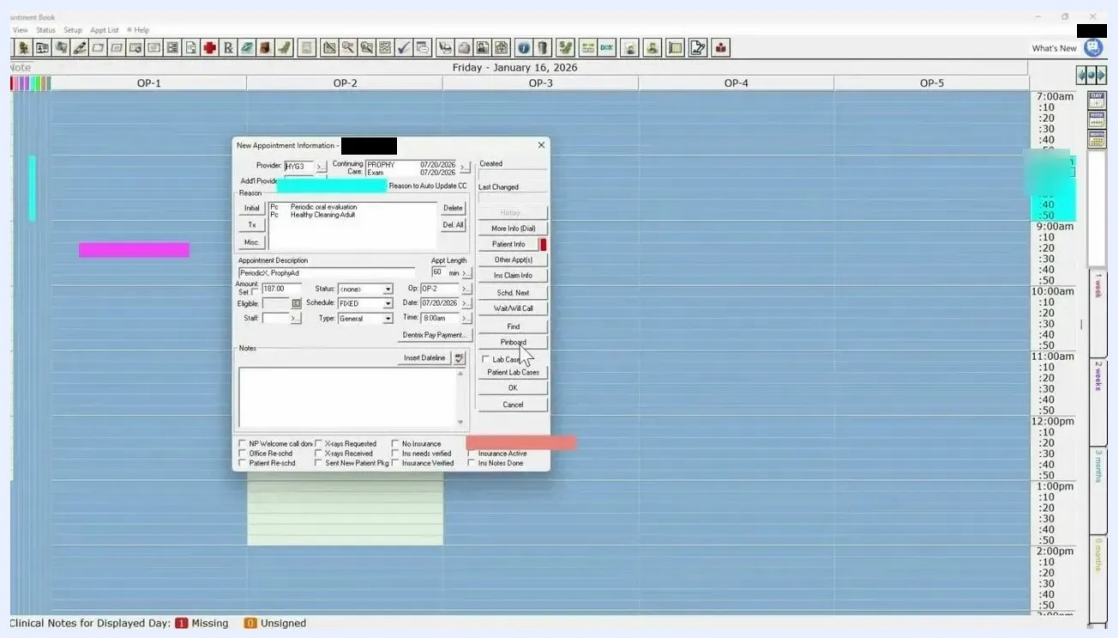
After you confirm the appointment details, click the **Pinboard** button in the **New Appointment Information** window. This temporarily stores the appointment on the Pinboard so you can move it to a different time or operatory. The Pinboard is useful when you need to discuss available times with the patient before you finalize the appointment.



New Appointment Information window with the cursor pointing to the Pinboard button and the schedule grid visible in the background

30. Browse the schedule for an available time slot

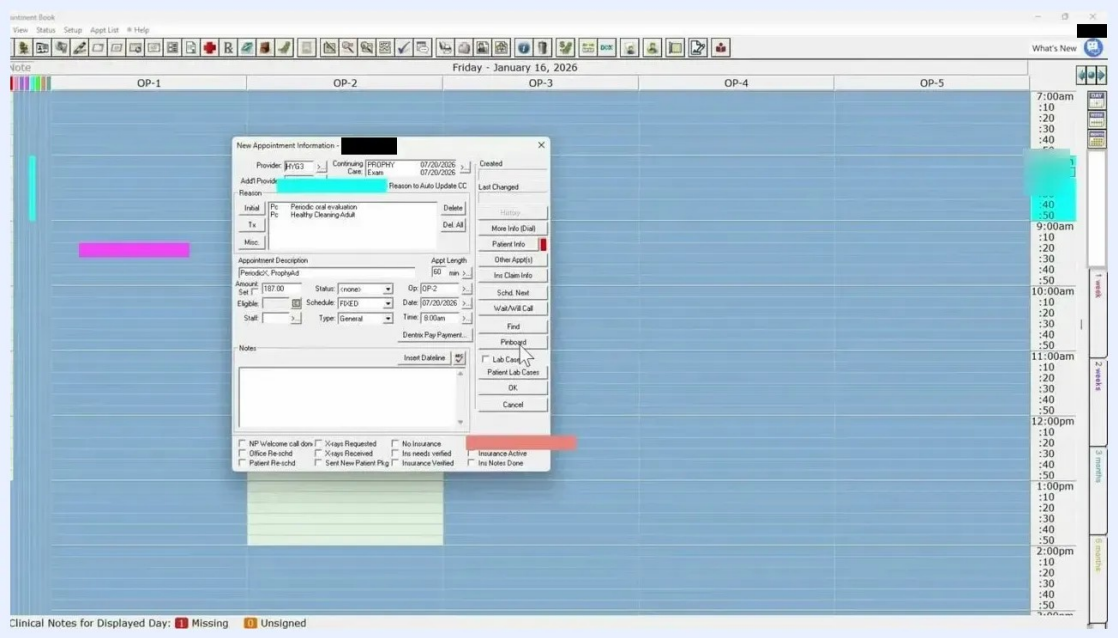
While the patient is present, use the schedule grid to flip through different days and times. Look for open slots that match the patient's and provider's availability.



Schedule grid for Monday, July 20, 2026, showing colored appointment blocks in different operatories while browsing for open times

31. Confirm the appointment time with the patient

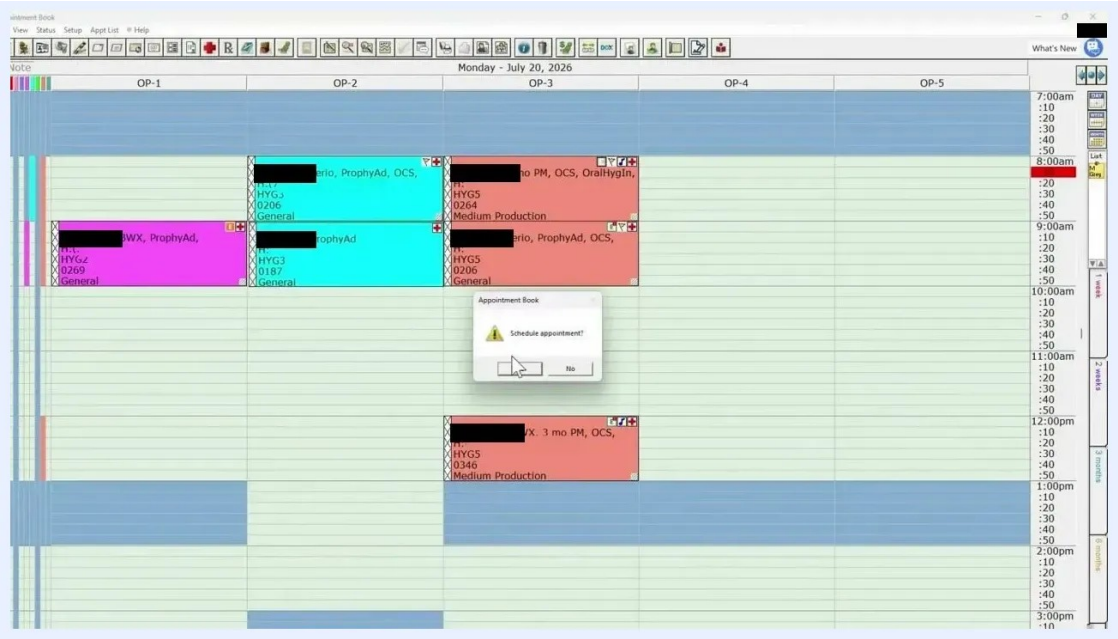
Suggest a specific available time to the patient (for example, "Does Monday, July 20th at 9 a.m. sound good?"). Make sure the selected time works for both the patient and the provider.



Schedule grid with open slots and existing appointments, ready for confirming a time with the patient

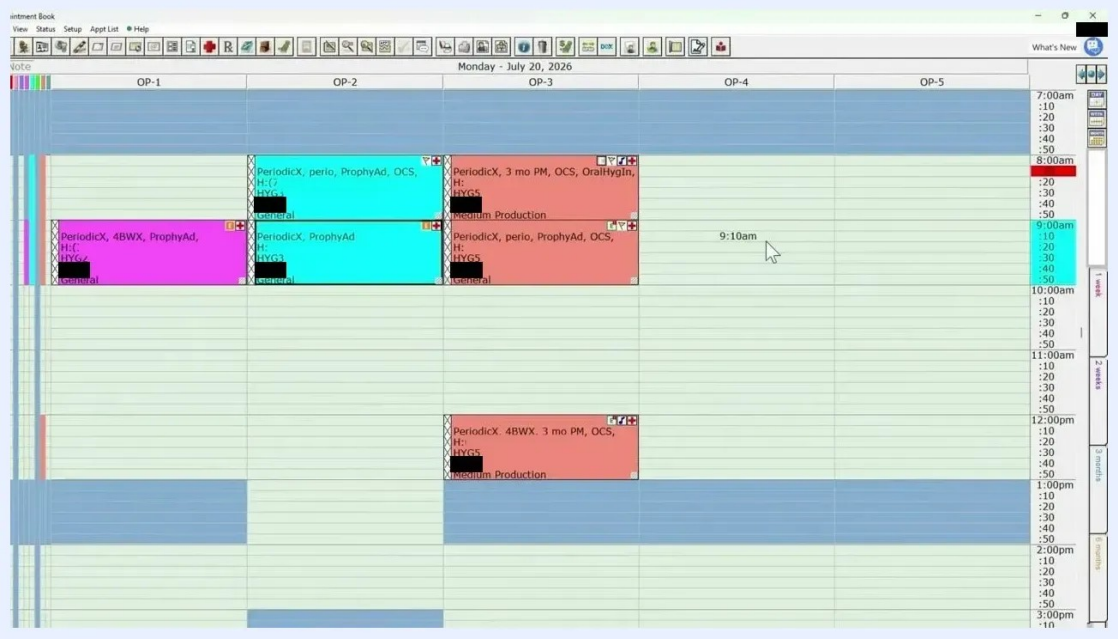
32. Schedule the appointment from the Pinboard

Drag the appointment from the Pinboard to the selected time slot in the schedule grid. A confirmation dialog titled **Appointment Book** asks "Schedule appointment?" Click **Yes** to place the appointment in the chosen slot.



Appointment Book dialog asking "Schedule appointment?" with Yes and No options over the schedule grid

Confirm that the appointment block appears in the correct operatory and time slot. The details should match what you discussed and agreed on with the patient.

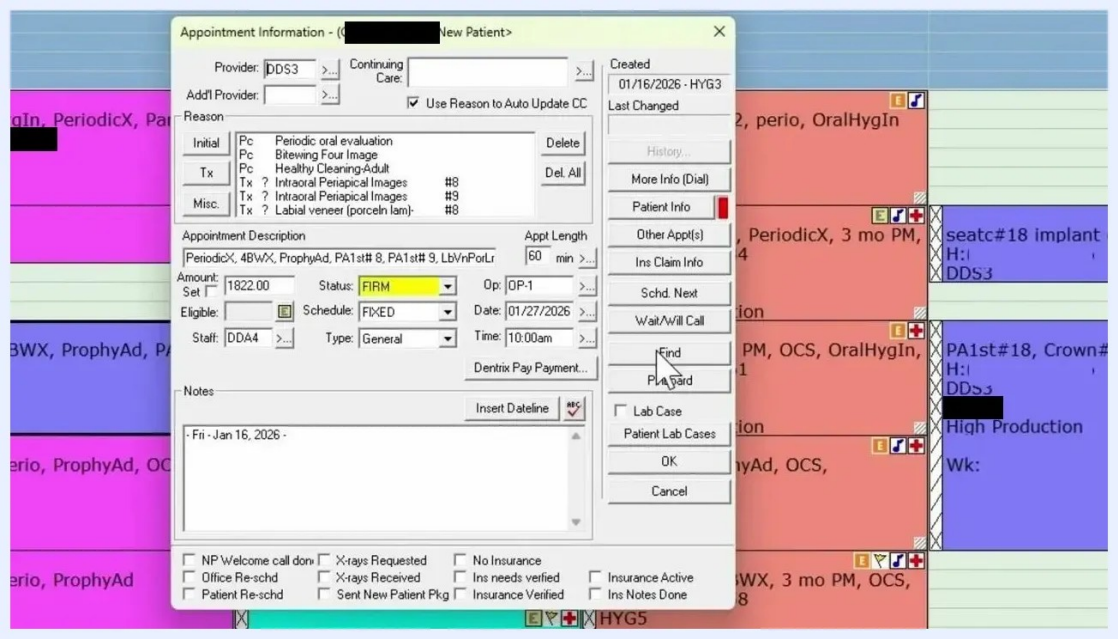


Schedule grid showing the newly scheduled appointment block in the correct slot alongside other appointments

Find a new appointment time

33. Use Find to search for available times

Click the **Find** button to search for open appointment slots that match the criteria set for the patient and provider. This is the most efficient way to locate available times when you schedule appointments in Dentrix.



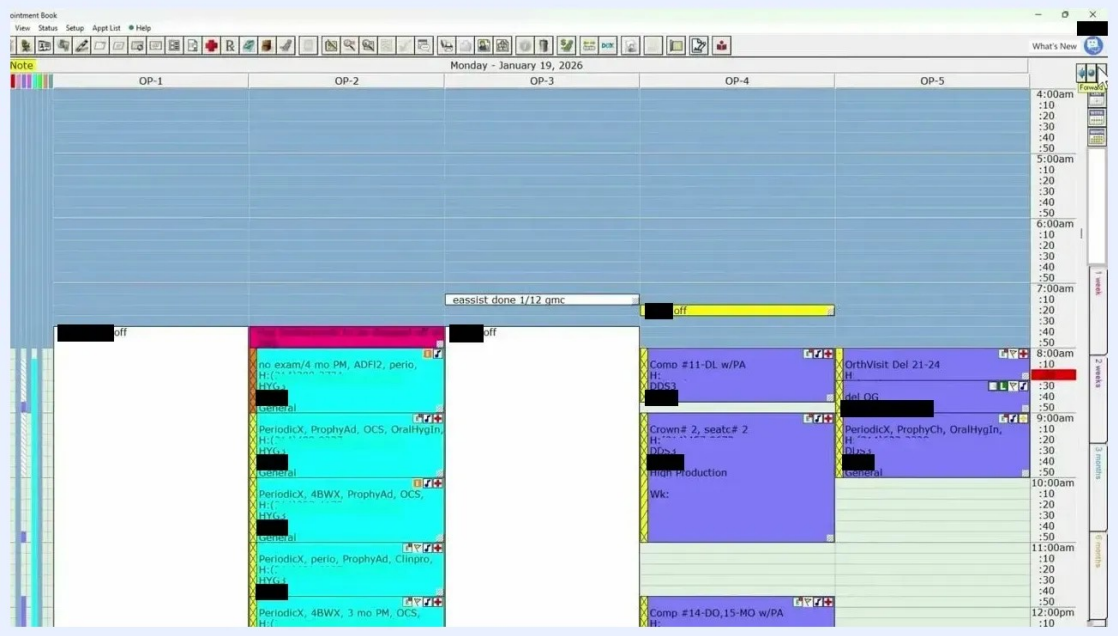
Appointment Information window with the cursor pointing to the Find button

34. Review the search parameters

In the **Find New Appointment Time** dialog, check each parameter before you search:

- Confirm the correct providers are selected (for example, COMP, CONS, DDS2, DDS3, HYG2, HYG3).
- Verify the appropriate operatories are selected (for example, OP-1 through OP-5).
- Select only the days the patient is available (for example, Monday).
- Set the start date (for example, 01/17/2026).
- Choose the appointment length (for example, 60 min).
- Optionally, select a specific time block (for example, "HP/CRN1 - OP-4 - DDS").
- Optionally, filter by appointment type (for example, General).

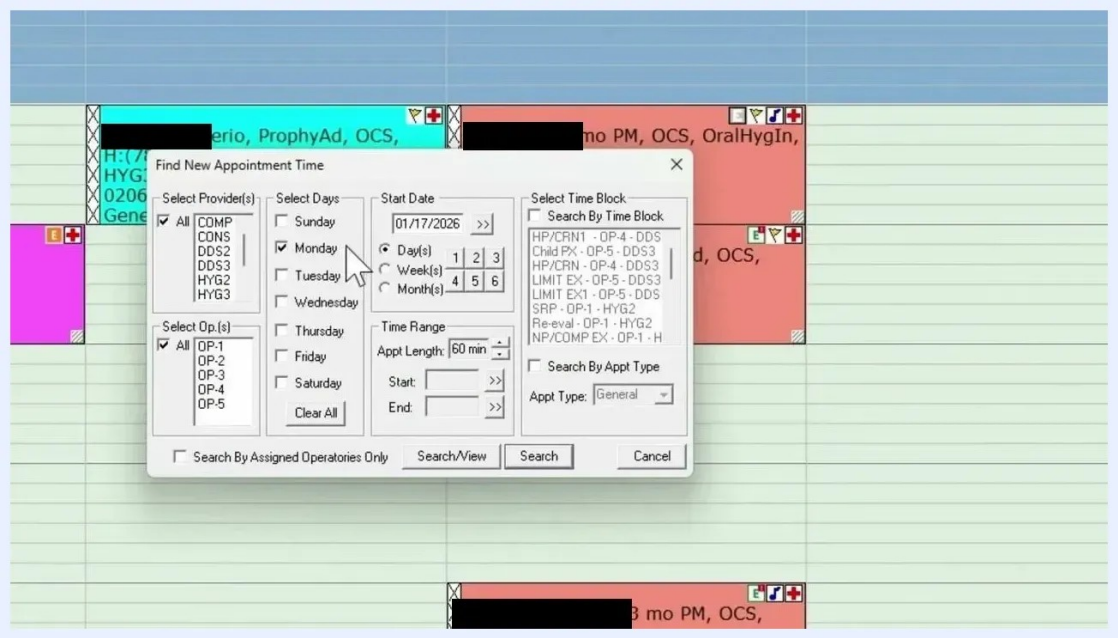
Double-check all selections to match the patient's and provider's needs.



Find New Appointment Time dialog with providers, operatories, Monday, start date 01/17/2026, 60 min length, and a time block selected, ready to click Search

35. Filter the available days

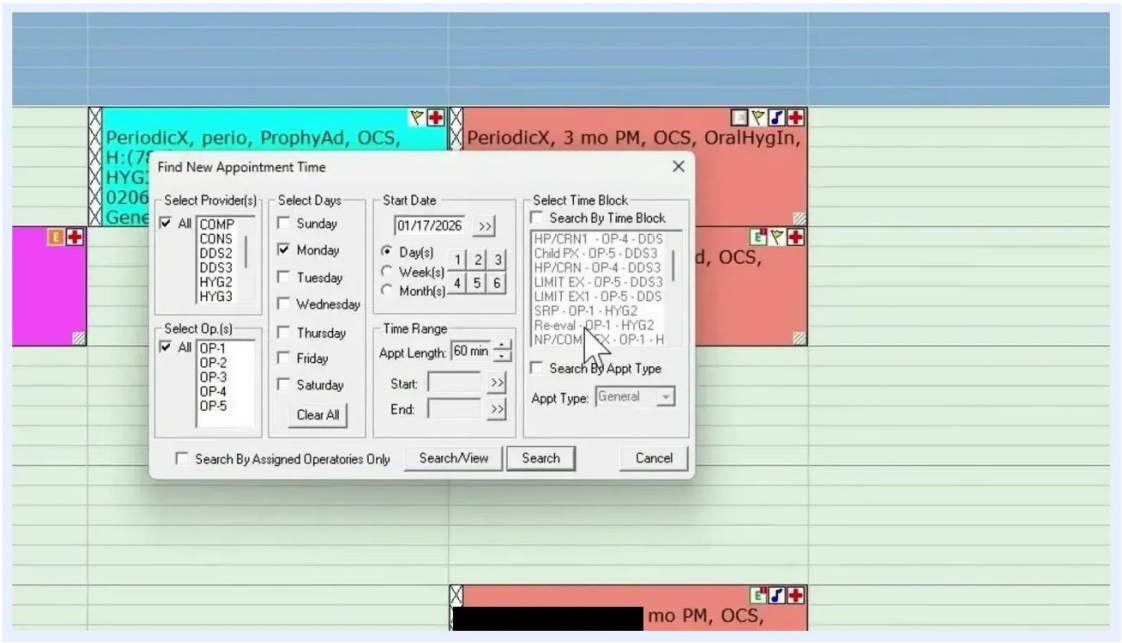
Clear all days except the ones the patient is available (for example, leave only **Monday** selected). This narrows the search to open times on those days.



Find New Appointment Time dialog with only Monday selected under Select Days

36. Search for available time blocks

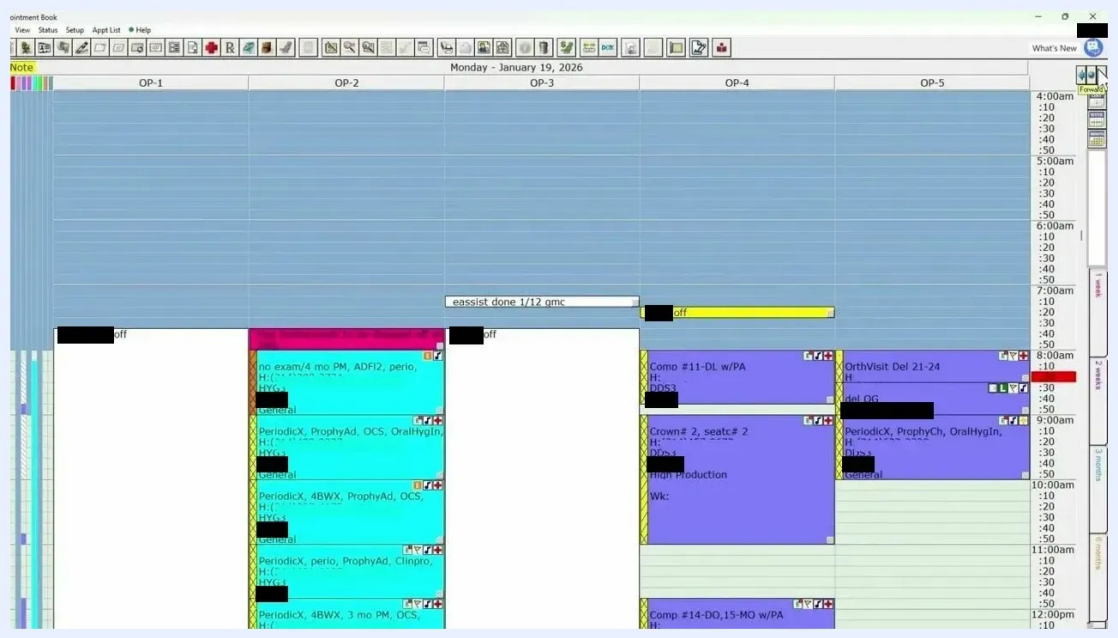
If your practice uses Perfect Day Scheduling, select the appropriate time block from the list. Click **Search** to find the next available time that matches all criteria. If Perfect Day Scheduling is not set up, refer to the setup instructions in the video link provided with your training materials.



Find New Appointment Time dialog with a time block highlighted, ready to search for the next available slot

37. Review the search results

The schedule grid updates to highlight available times that fit your search criteria. Available slots appear within the full appointment book, with existing appointments and provider and operatory assignments visible.



Appointment Book grid for Monday, January 19, 2026, showing available and existing appointments across operatories with search results

38. Adjust the search parameters if needed

If the search returns too many or too few results, adjust your criteria. For example, limit the search to fewer days, specific operatories, or a shorter time range, or change the appointment length or time block. This helps you identify the most suitable slots without manually flipping through each day.

Using the search function is faster and more efficient than browsing day by day, especially when you schedule for busy providers or multiple operatories.

Summary

You now know how to schedule appointments in Dentrix for an existing patient. You open the Appointment Book, select the patient, and attach procedure codes. You then set the provider, status, schedule type, appointment type, date, time, and operatory, and add notes. You also review continuing care, track tasks and lab cases, and save the appointment.

Generated with docsie.io

You can also schedule the next re-care appointment, hold an appointment on the Pinboard while you confirm a time with the patient, and use Find to locate open slots.