How to schedule appointments with appointment types in Open Dental

Appointment types in Open Dental use colors, procedures, and time patterns to make your schedule easier to read. This guide shows you how to schedule appointments with appointment types in Open Dental. You will set up the types, create planned appointments, move them to the pinboard, place them in the appointment book, and schedule an additional appointment.

Prerequisites

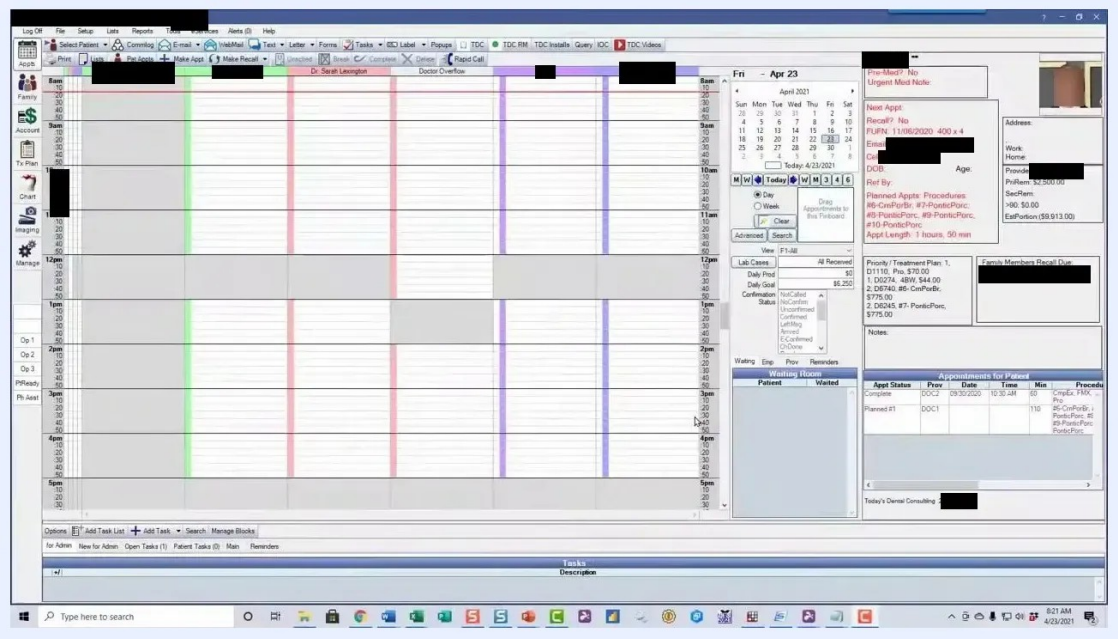
- Open Dental is open, and you can reach the main scheduling screen.
- You can access the **Setup** menu to open **Appointment Types**.
- You have a patient chart to work from when you create planned appointments.

Set up appointment types

Step 1: Open the appointment schedule

Open Open Dental and go to the main scheduling screen. You see a column for each provider, such as Dr. Sarah Lexington, Dr. Brian Albert, Doctor Overflow, Tina, and Betty RDH.

Time slots and color-coded vertical lines help you organize the schedule visually. Patient information and appointment details appear on the right side of the screen.

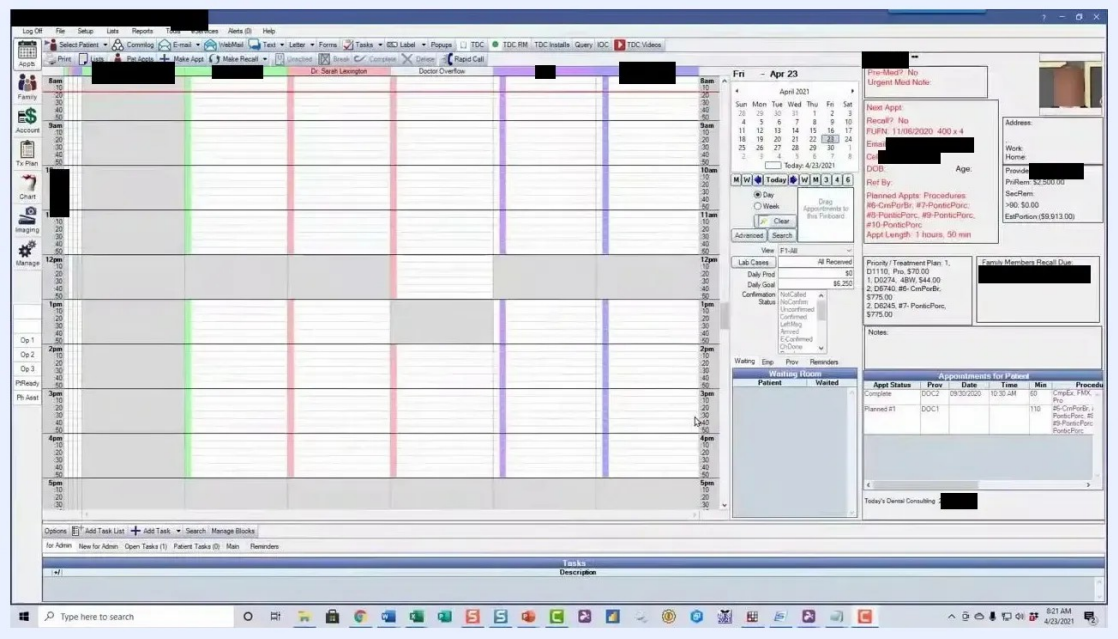


Main scheduling screen with provider columns, time slots, and patient details

Step 2: Open the appointment types setup

From the top menu, select **Setup**, then **Appointments**, then **Appointment Types**. The **Setup Appointment Types** dialog opens.

The dialog lists every current appointment type with its color and visibility status. Examples include Rocky, Sandy, New Patient, NP Exam & Pro, ER, Web Sched ER, and WebSched Existing Pt Check Tooth.



The Setup Appointment Types dialog listing appointment types and their colors

Step 3: Use a few distinct colors

Assign a few distinct colors to your appointment types so everyone in the office can recognize them easily. Avoid too many colors or types, because they can cause confusion.

For example, "Rocky" (productive time) and "Sandy" (less productive time) each have a unique color. New Patient has its own color, NP Exam & Pro is bright green, and ER is red. The web-scheduled types are also red.

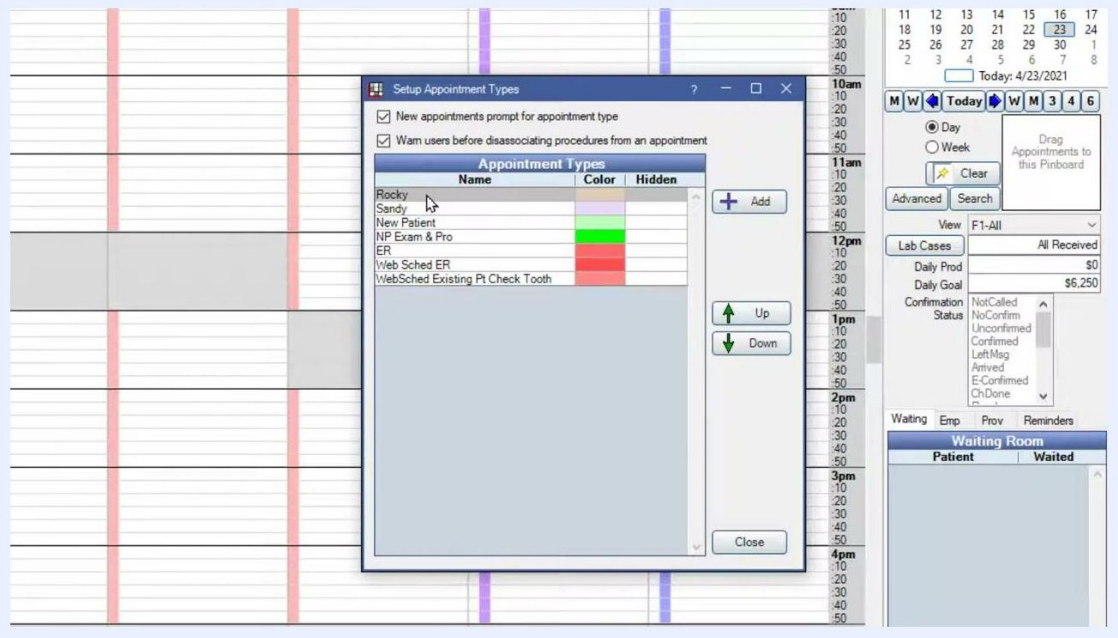
The color tells you the type of appointment and sometimes its source, such as web-scheduled versus a patient call.

Step 4: Apply best practices for procedures and time patterns

Follow these guidelines when you configure each type:

- For productive time blocks such as "Rocky," do not assign specific procedures. This keeps the time flexible for various productive tasks.
- For emergency or other specific types such as "ER," include the relevant procedures (for example, cone beam and limited exam) and set a time pattern.

This approach keeps your scheduling clear and flexible.



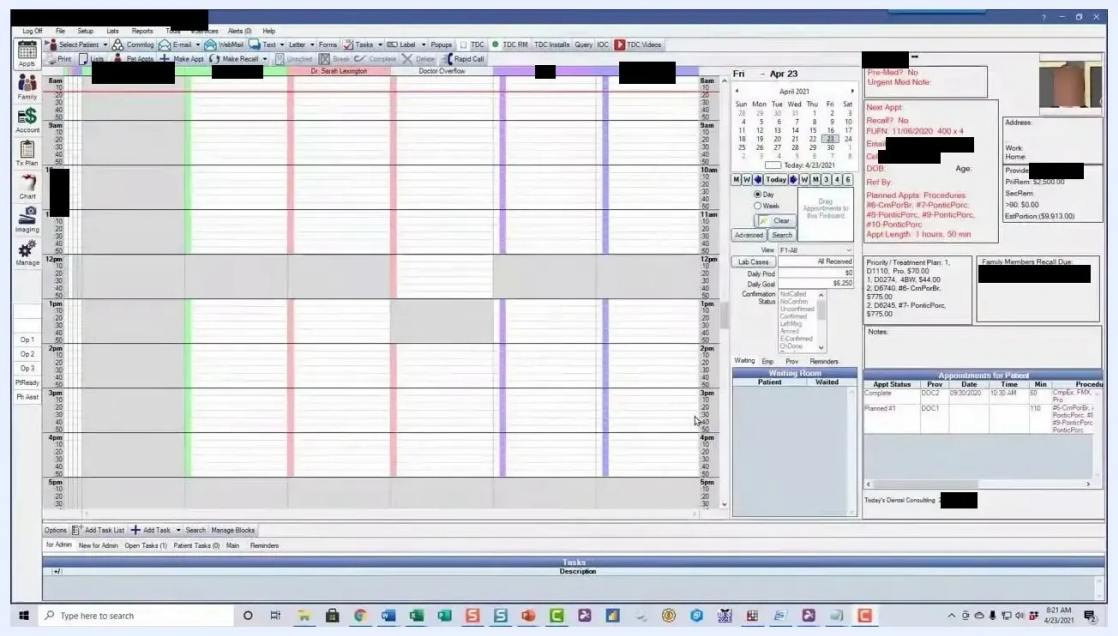
The Setup Appointment Types dialog with Rocky (no procedures) and ER (emergencies) highlighted

Step 5: Review and edit appointment types

In the **Setup Appointment Types** dialog, review the list of types and their colors. You can use these controls:

- Click **Add** to add a new type.
- Use the **Up** and **Down** arrows to change the order.
- Click **Close** to close the dialog.

Make sure each color and type is meaningful and easy for all staff to understand.

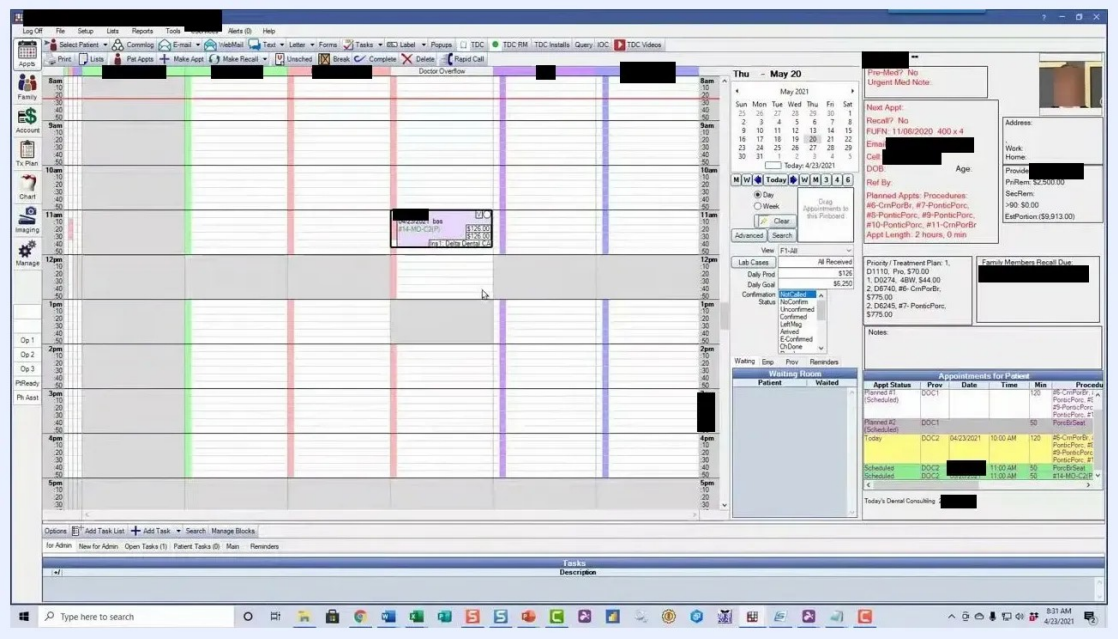


The Setup Appointment Types dialog with Rocky and Sandy highlighted to show their color assignments

Step 6: Identify appointment types by color on the calendar

Look at the main calendar view to see your scheduled appointments. Each appointment appears in the color of its type. For example, a "Sandy" appointment appears in the color you assigned to Sandy.

Hover over or click an appointment to see its details, including patient name, date, provider, and procedures. Use the color to tell quickly whether an appointment is sand or rock.



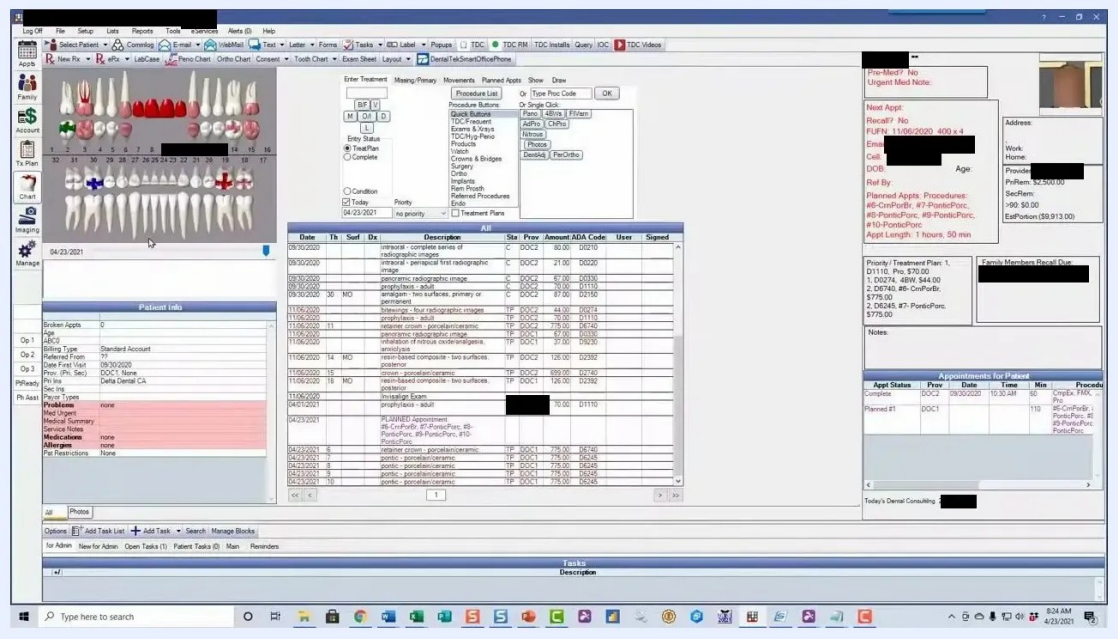
The calendar view with colored appointment blocks and visible patient and procedure details

Create planned appointments

Step 7: Open the patient's chart

Go to the patient's chart, for example Brad Pitt. The chart shows a tooth diagram, a procedure list, and patient information.

Review the treatment entered for the current visit. Confirm that the treatment plan is up to date and that you are still in the operatory with the patient and doctor.

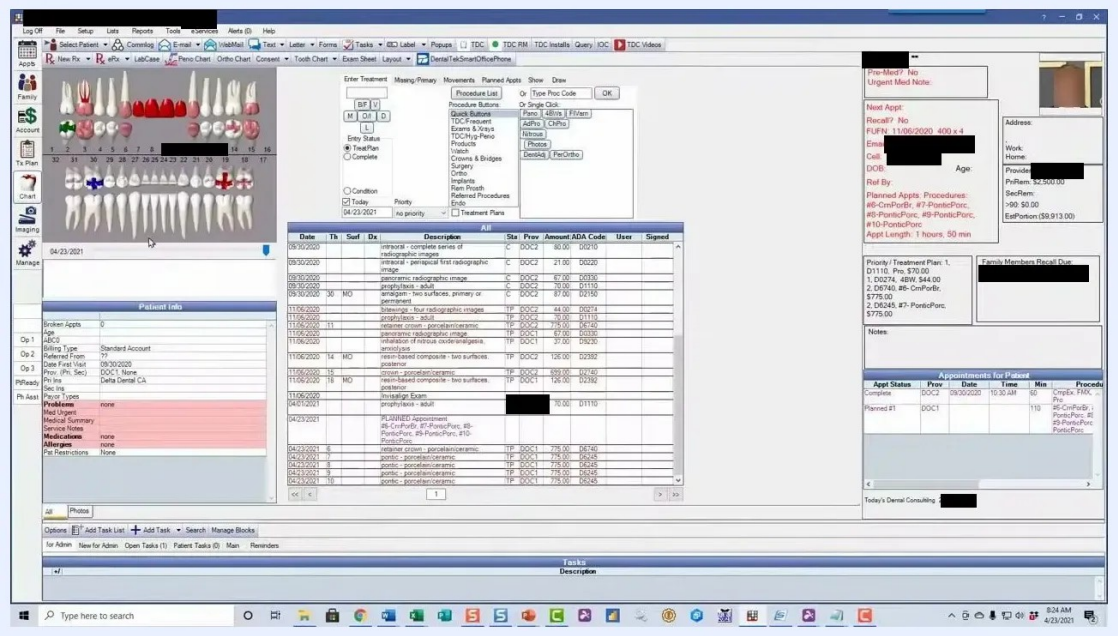


Brad Pitt's patient chart with the tooth diagram, procedure list, and patient information

Step 8: Start a planned appointment

In the patient's chart, click the **Planned Appts** tab or button. Here you create a planned appointment for future scheduling, which improves coordination between the clinical and front office teams.

A planned appointment does not appear in the main appointment book until you schedule it.

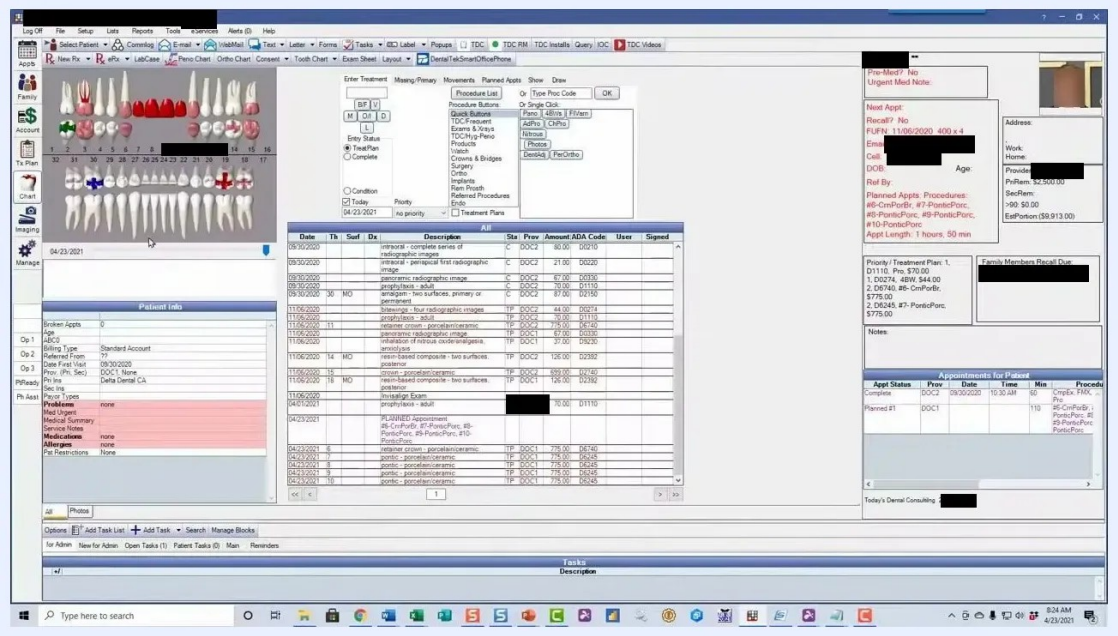


The Planned Appts tab highlighted in the patient chart, ready for creating a planned appointment

Step 9: Understand pre-configured appointment types

Some appointment types, such as "ER," come pre-configured with specific procedures and time patterns. When you schedule an appointment of this type, Open Dental automatically inserts the associated procedures (for example, D0140 and D0367) and the default time (for example, 40 minutes).

You can edit these details if needed, but the defaults streamline the process.



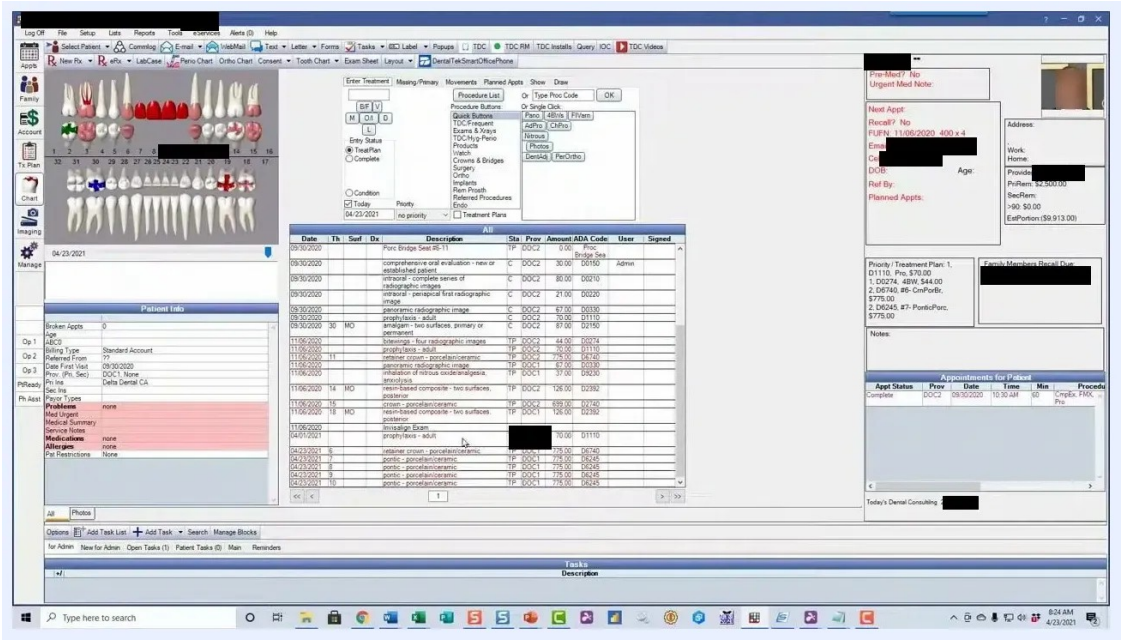
The Appointment Type edit dialog for ER showing the color, time, and procedures D0140 and D0367

Step 10: Configure the planned appointment

Click to add a new planned appointment. In the **Edit Planned Appointment** window, fill in the following:

- **Provider:** Select the appropriate provider (for example, DOC1).
- **Appointment Type:** Choose the relevant type (for example, "Rocky" for a bridge procedure).
- **Color:** Assign the color associated with the appointment type for visual clarity.

The procedures for the appointment are listed on the right. You can add or adjust them as needed.

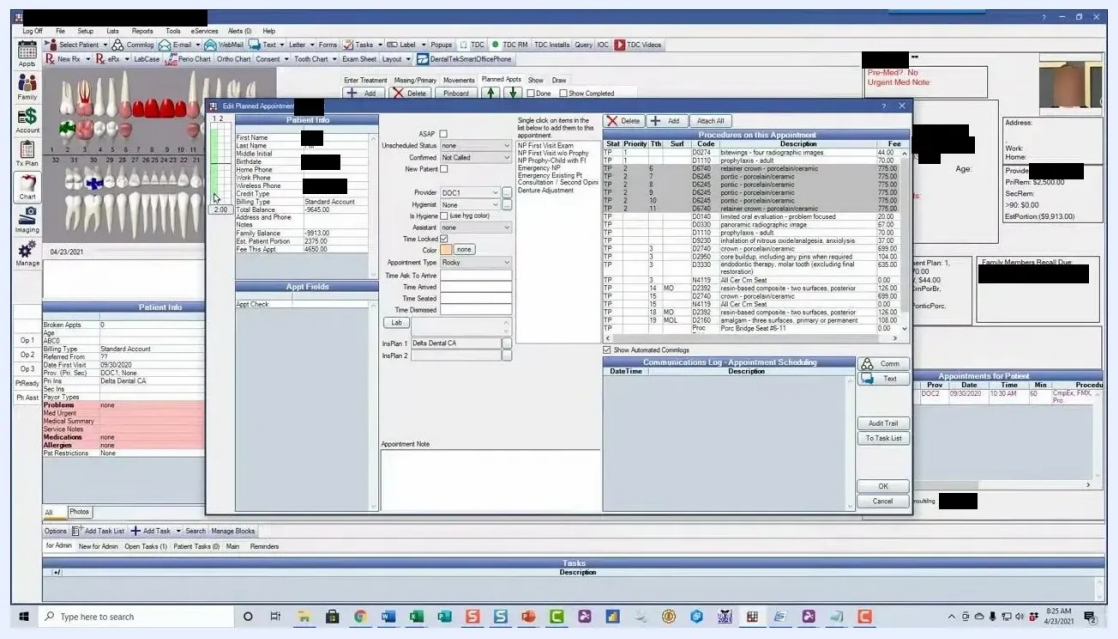


The Edit Planned Appointment window with Appointment Type set to Rocky and a provider selected

Step 11: Adjust the duration and responsibilities

Review the time allocated for the planned appointment. If the default is not enough (for example, not enough time for a bridge), extend the duration.

You can also assign tasks, such as having the chairside assistant perform the temporary, which frees up the doctor's time. Make sure the time pattern reflects the clinical workflow.

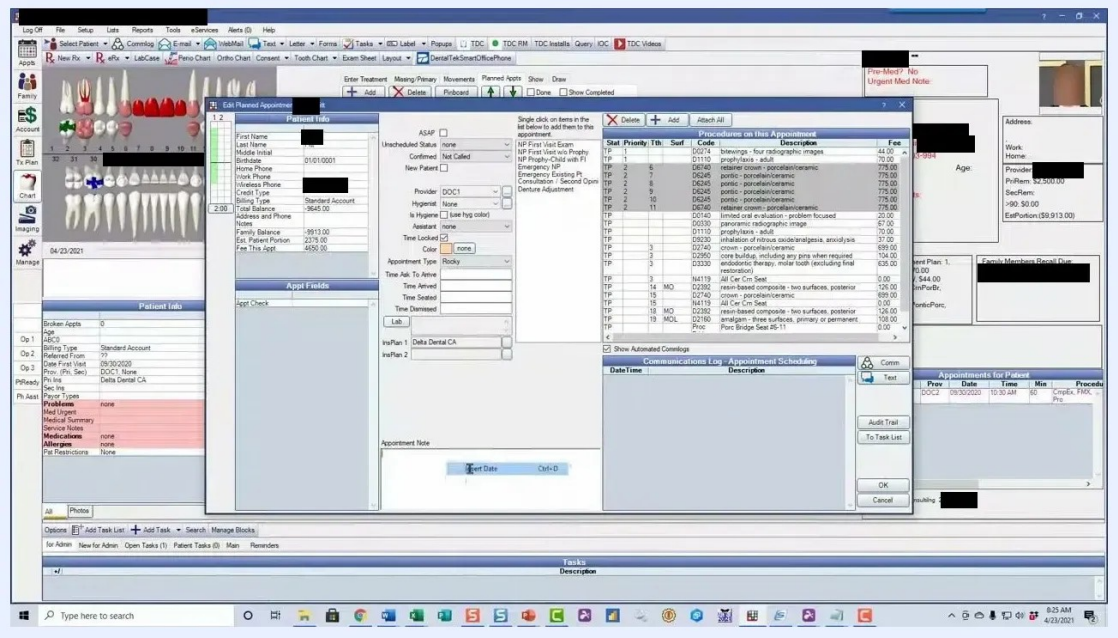


The Edit Planned Appointment window with the time adjusted for a bridge procedure

Step 12: Document the planned appointment

Scroll to the appointment note section at the bottom of the window. Right-click to insert the current date, or add your initials for tracking.

This documents who created or modified the planned appointment.

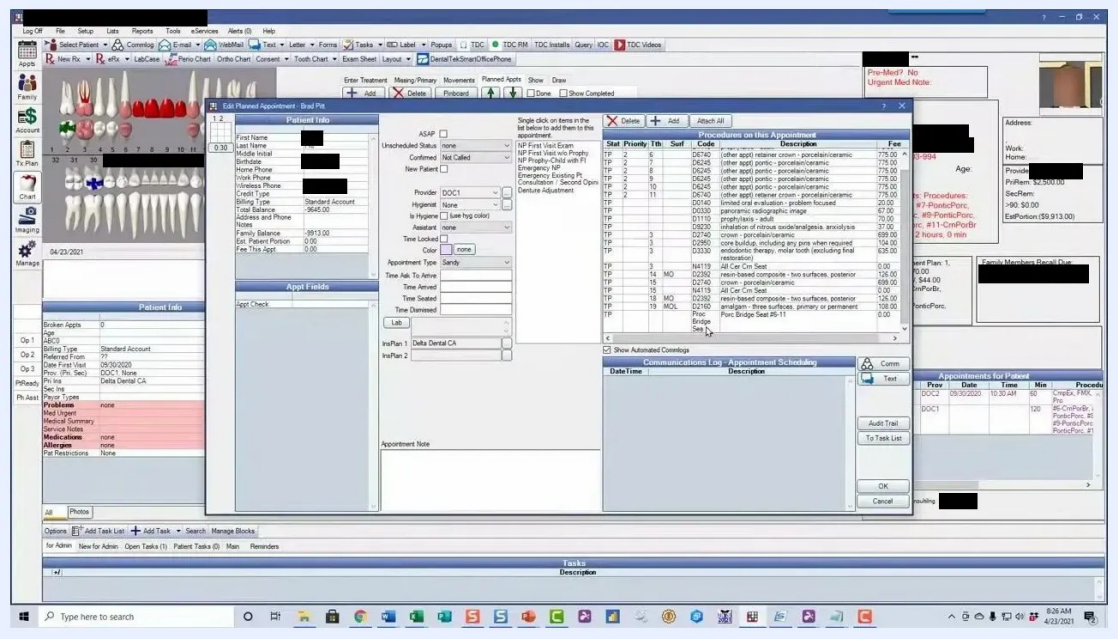


The appointment note section of the Edit Planned Appointment window with the Insert Date option

Step 13: Add another planned appointment

After you create the first planned appointment, click **Add** in the Planned Appointments section to create another. For example, add a second planned appointment for the bridge seat procedure.

Set the **Appointment Type** to "Sandy" for the bridge seat and select the correct provider (for example, DOC1). Review and adjust the list of procedures as needed.



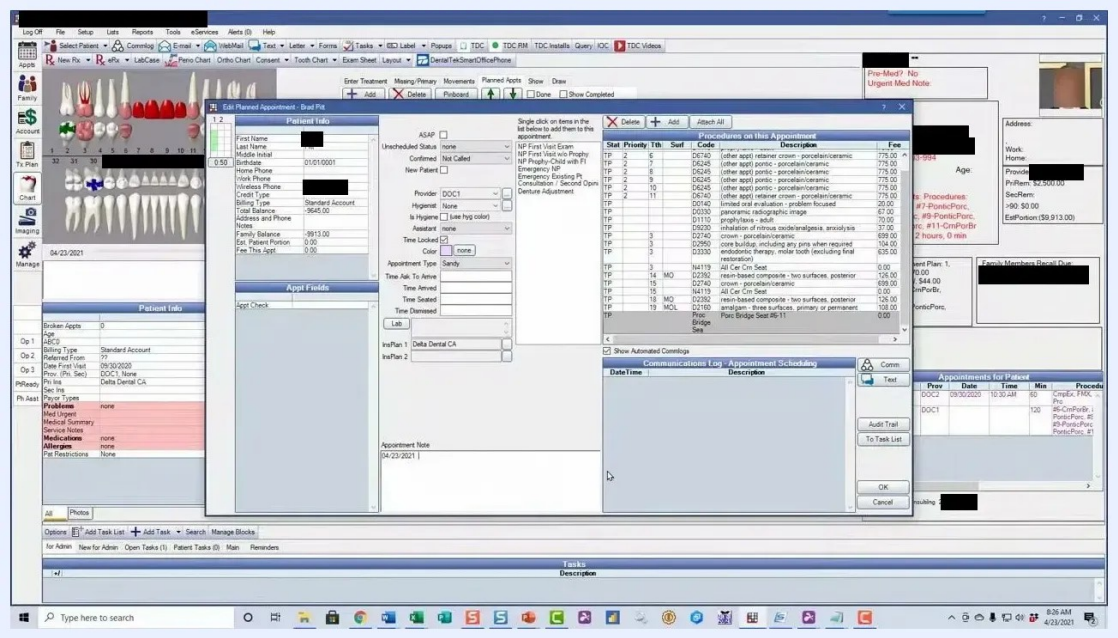
The Edit Planned Appointment window for the second appointment with Appointment Type set to Sandy and procedures listed

Step 14: Adjust the appointment duration

If the default time is not enough (for example, for a bridge seat), increase the appointment duration in the **Min** field. Make sure the time matches the clinical requirements for the procedure.

Step 15: Add notes to the appointment

In the appointment note section, right-click to insert a date stamp. Add clarifying notes, such as "two weeks after prep appt," so anyone reviewing the planned appointments understands the timing.

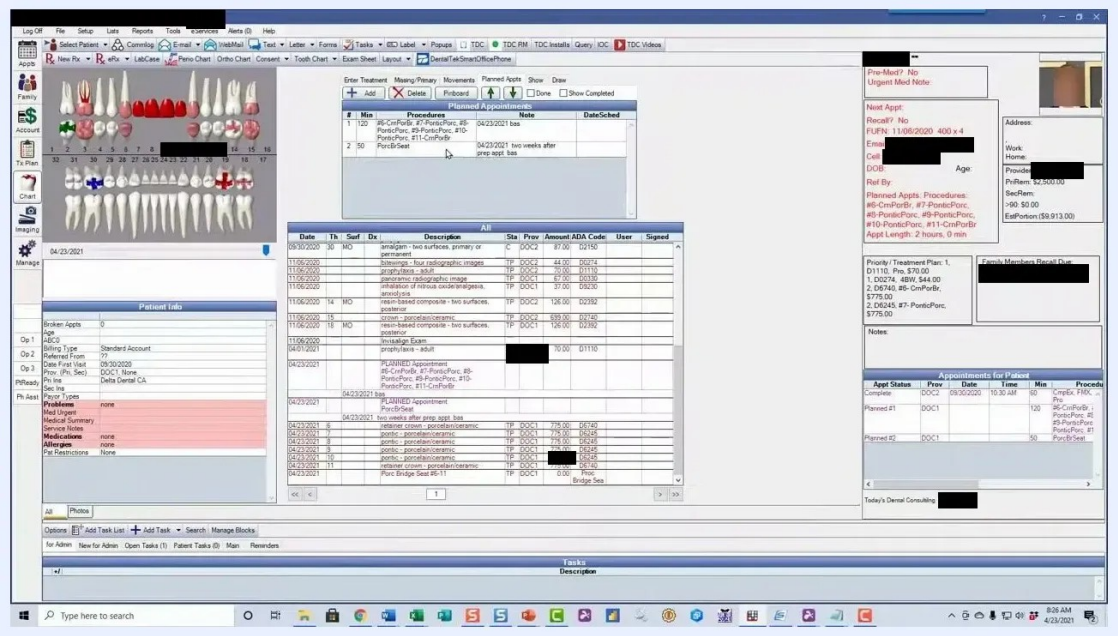


The appointment note in the Edit Planned Appointment window with date and timing details

Step 16: Review and organize the planned appointments

View all planned appointments in the Planned Appointments list. Confirm that each one is clearly labeled and sequenced (for example, prep first, bridge seat second).

If the sequence needs to change, move the planned appointments up or down in the list.



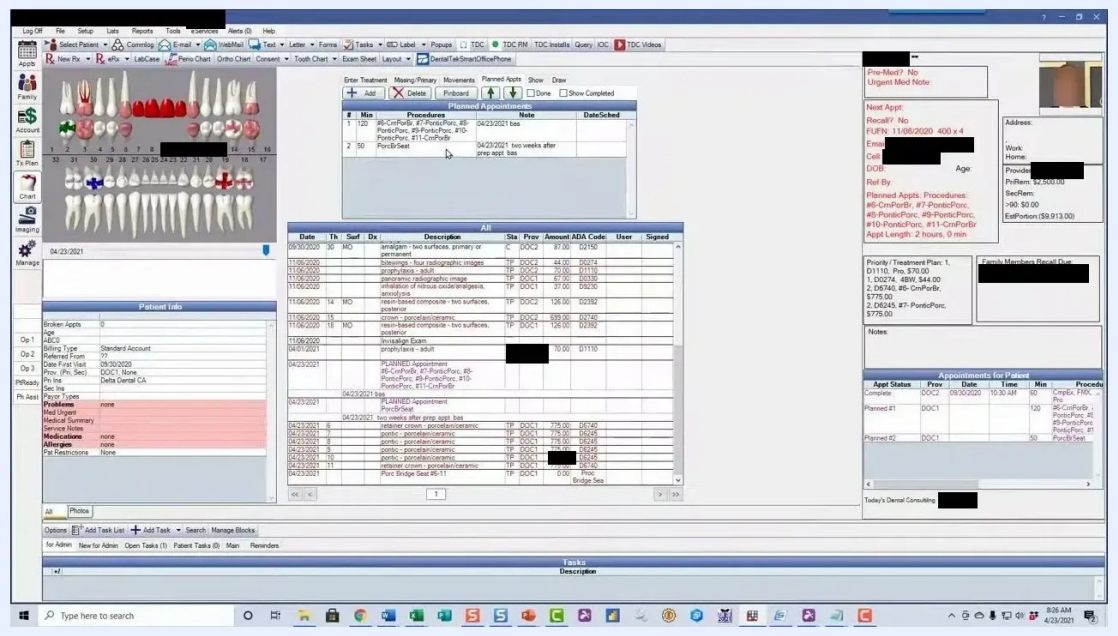
The Planned Appointments list showing two appointments with their notes and order

Schedule appointments from the pinboard

Step 17: Copy a planned appointment to the pinboard

Once your planned appointments are final, select the one you want from the list. Double-click it, or use the **Pinboard** button, to copy it to the pinboard.

From the pinboard, you can drag and drop the appointment into the appointment book at the time and operatory you want.



The Edit Planned Appointment window with the Pinboard button highlighted

Step 18: Find a time two weeks out

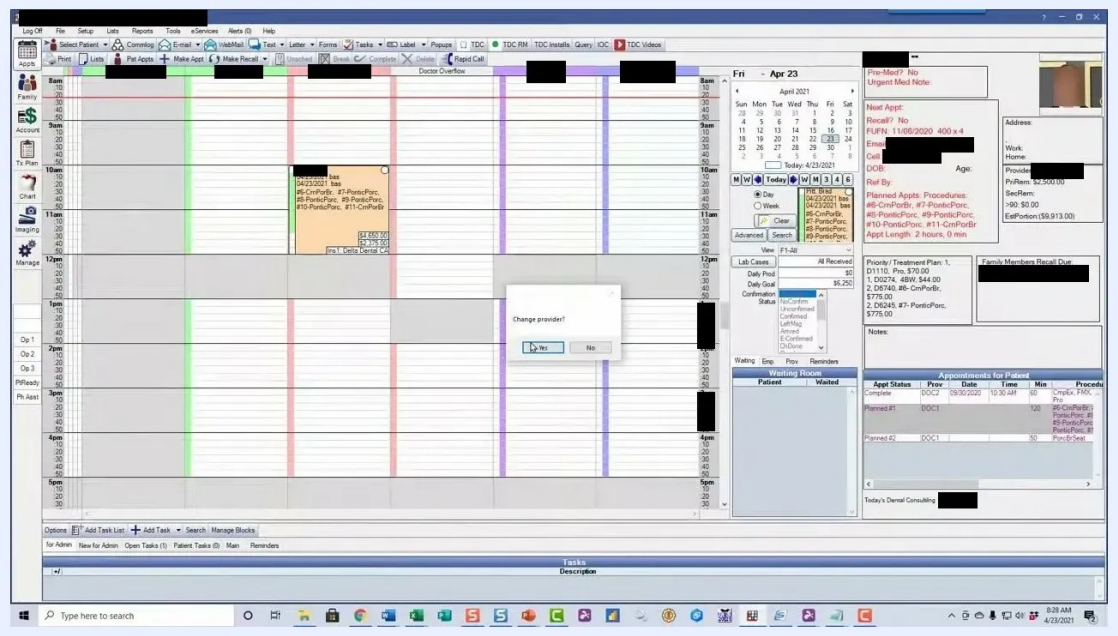
Identify the patient whose appointment you are scheduling (for example, Brad Pitt). Use the calendar navigation tools, such as the mini-calendar on the right, to move forward two weeks. Then select an available time slot for the follow-up appointment.

Step 19: Place the appointment in the appointment book

Drag the appointment from the pinboard to the time slot and operatory you want in the appointment book. The appointment type color moves with the appointment.

If you place the appointment in a different provider's operatory, a "Change provider?" prompt appears. Click **Yes** to update the provider, and do not change the appointment length during this process.

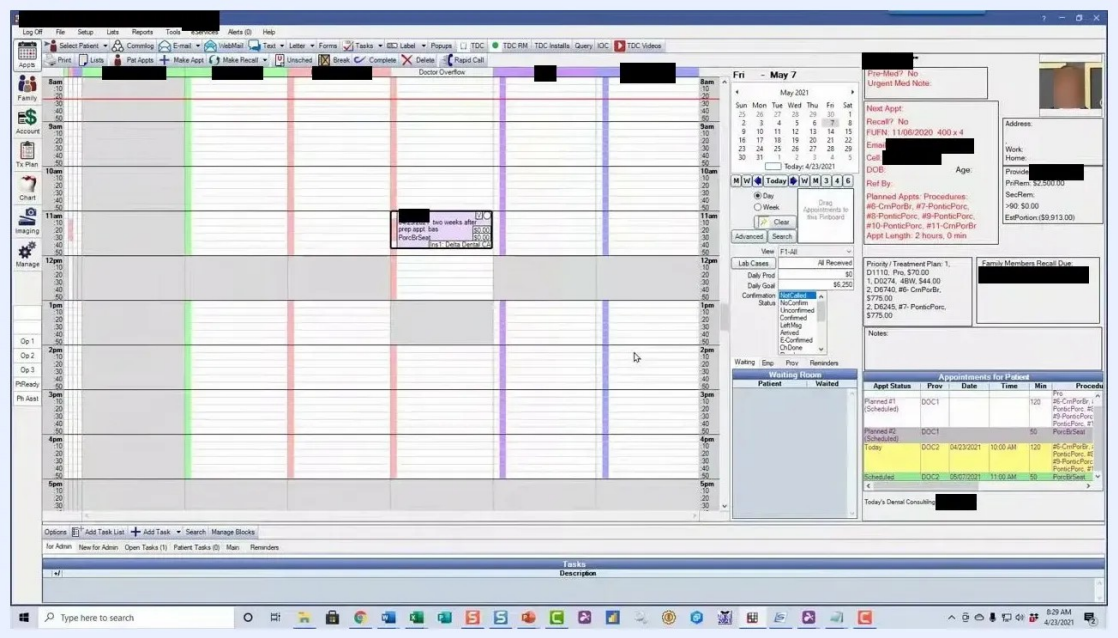
The provider color (the column) is separate from the appointment type color (the block).



The appointment book with the appointment placed and the "Change provider?" dialog showing appointment and provider colors

Step 20: Verify that both appointments are scheduled

Confirm that both of the patient's appointments now appear on the calendar. Check the appointment details, such as date, time, procedures, and insurance, for accuracy.



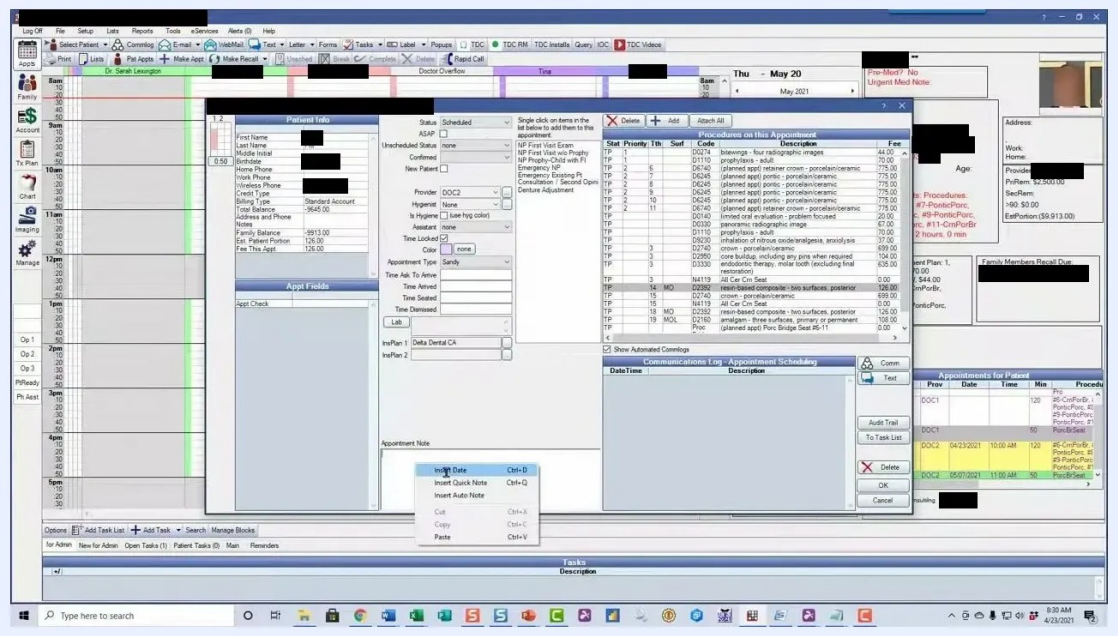
The calendar view showing both scheduled appointments for the patient

Schedule an additional appointment

Step 21: Start a new appointment

To schedule another appointment, such as a filling, move further out on the calendar to find a suitable date. Double-click the time slot you want to begin creating the appointment.

Confirm the patient's identity and select the correct appointment type (for example, "Sandy" for a filling).

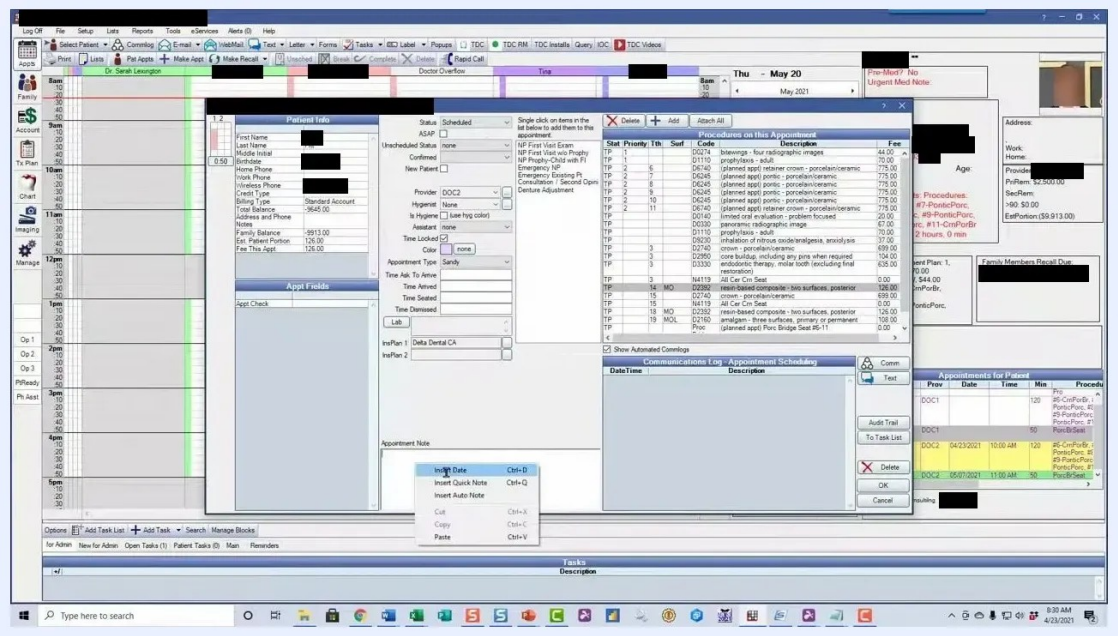


The calendar view with a new time slot selected for an additional appointment

Step 22: Edit the appointment details and add notes

In the appointment editing window, review and update the patient and appointment information as needed. Right-click in the **Appointment Note** field to open the context menu.

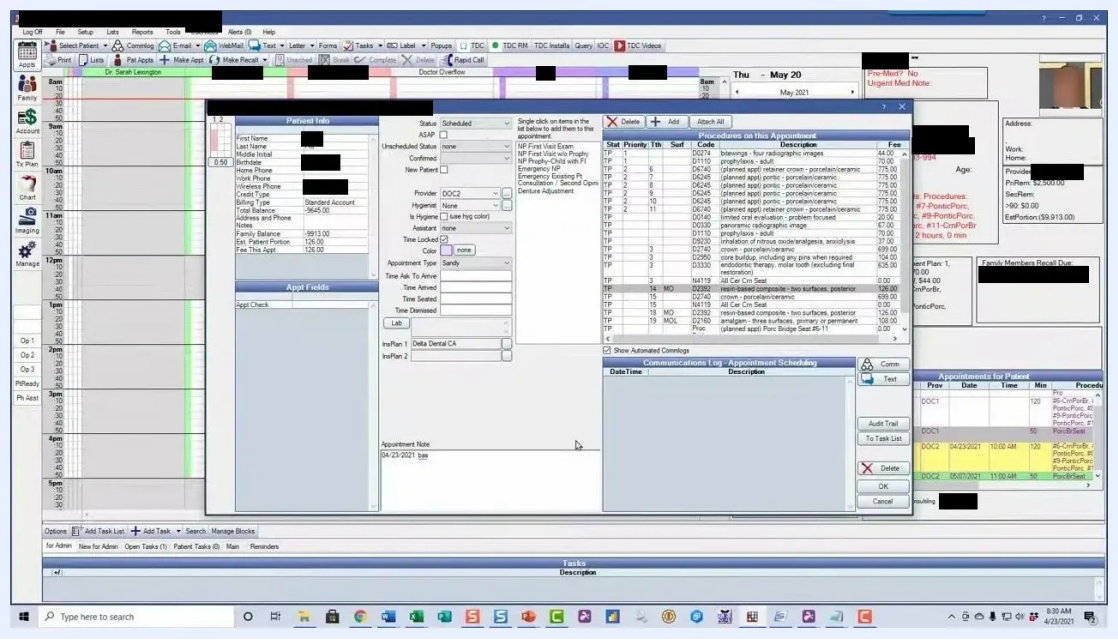
Select **Insert Date** (or press Ctrl+D) to date-stamp the note. Then add your initials or any other relevant information.



The Edit Appointment window with the context menu for inserting a date and adding notes

Step 23: Save the appointment

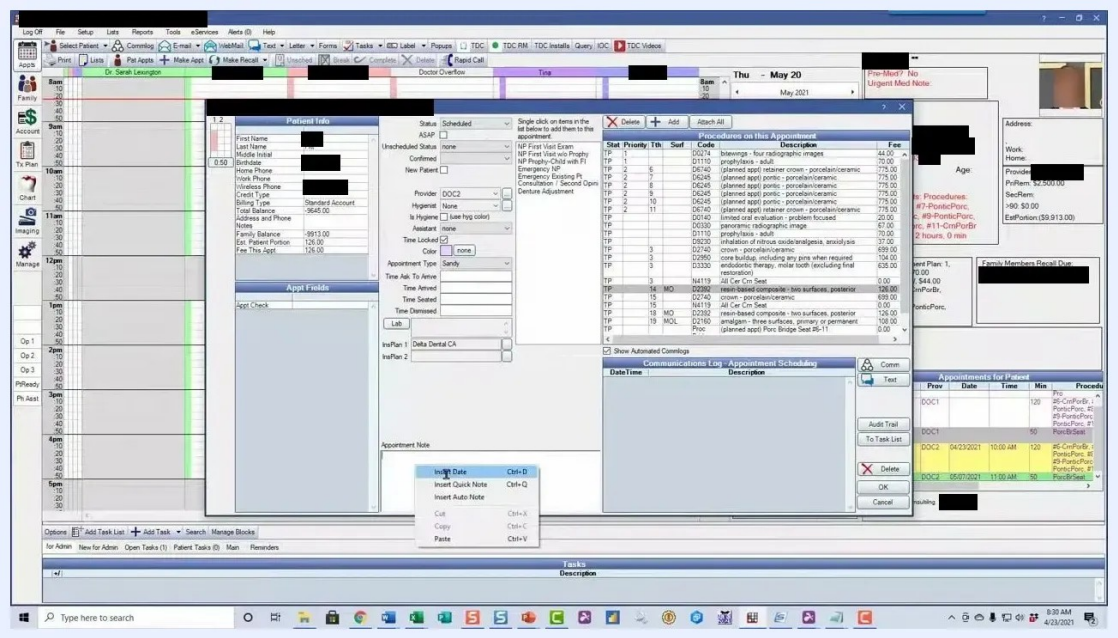
Make sure all details are correct, including procedures, provider, and notes. Click **OK** (or the appropriate button) to save the appointment.



The Edit Appointment window with updated notes and appointment details

Step 24: Review the updated calendar

Confirm that the new appointment appears on the calendar with the correct details. Verify that all of the patient's scheduled appointments are visible and accurate.



The calendar view showing all scheduled appointments, including the new filling appointment

Summary

You now know how to schedule appointments with appointment types in Open Dental. You set up distinct, meaningful types, created and sequenced planned appointments, moved them to the pinboard, and placed them in the appointment book while keeping provider and appointment type colors separate.

This workflow improves communication between clinical and administrative staff, reduces scheduling errors, and supports continuity of patient care.