

Practice Success



How to Get Started with Online Booking

Webinar Controls



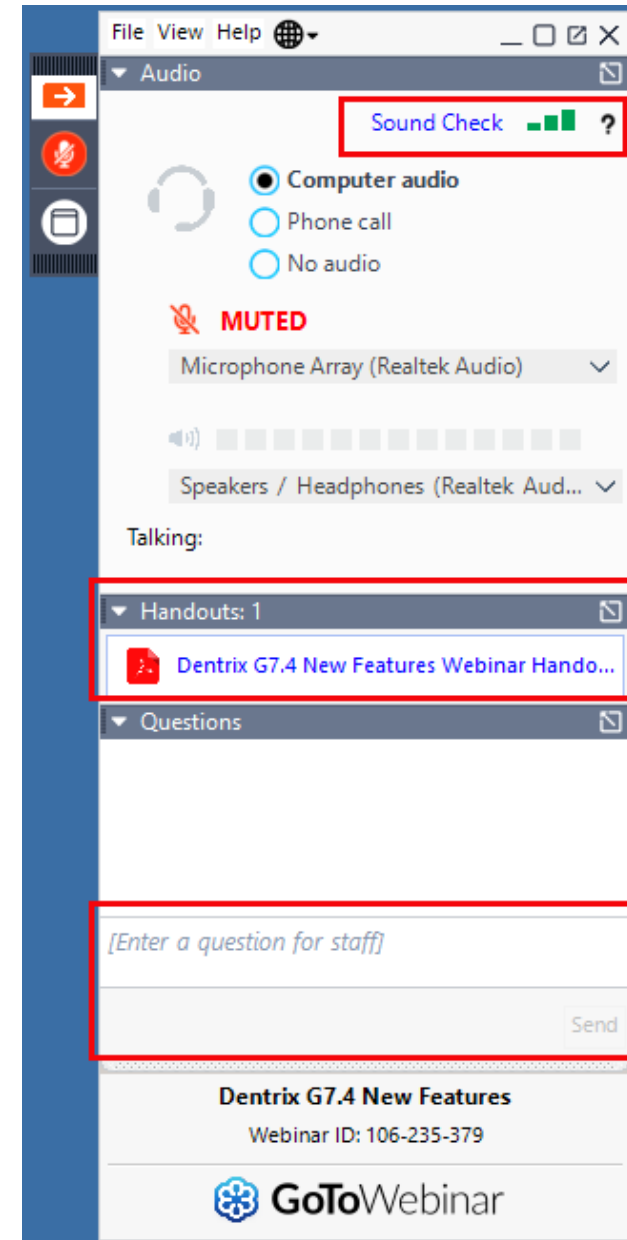
Use the Sound Check to test your audio for the webinar



Click the PDF link to download the webinar handout



To ask a question, type your question in the box



Today's Presenter: Terra Westerholt

- Terra is an eServices Trainer with over 20 years' experience working in the dental industry.
- Terra became a Dentrrix Certified trainer 15 years ago and currently works as an eServices trainer.
- Terra provides practices across the US with a well-rounded training experience. She is passionate about training on Henry Schein products!



What is your position in your practice?

- Doctor/Dentist
- Clinical Staff
- Front Office Staff
- Office Manager
- Other

How confident are you with online booking?

- Very confident
- Somewhat confident
- Not very confident
- Not at all confident, HELP!

Introduction

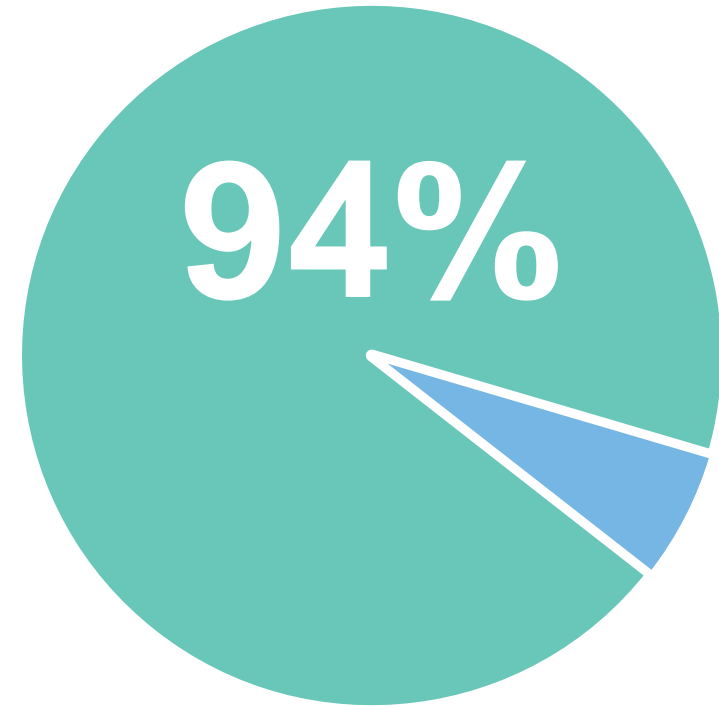
- Why make a patient wait a minute longer than necessary when they're ready to book an appointment?
- A convenient, easy scheduling process can be the beginning of an excellent patient experience.





The typical dental office is open only 32 hours a week.

Online booking is available 168 hours a week.



94% of patients would be more likely to choose a new service provider that offered online booking options.*

*Lisa Hedges, "[Online Booking Options Can Get You More Clients](#)," GetApp, April 7, 2021.

Online Booking Advantages



Free up your time for other important tasks



Have your schedule fill itself



Increase patient satisfaction



Offer 24/7 scheduling

What Can I Do With Online Booking?

First:

- We'll see online booking from the patient's perspective

Then, we'll discuss:

- Using pre-created appointment reasons
- Creating custom appointment reasons
- Customizing available providers and schedules
- Optimizing your outreach
- Viewing appointments booked online



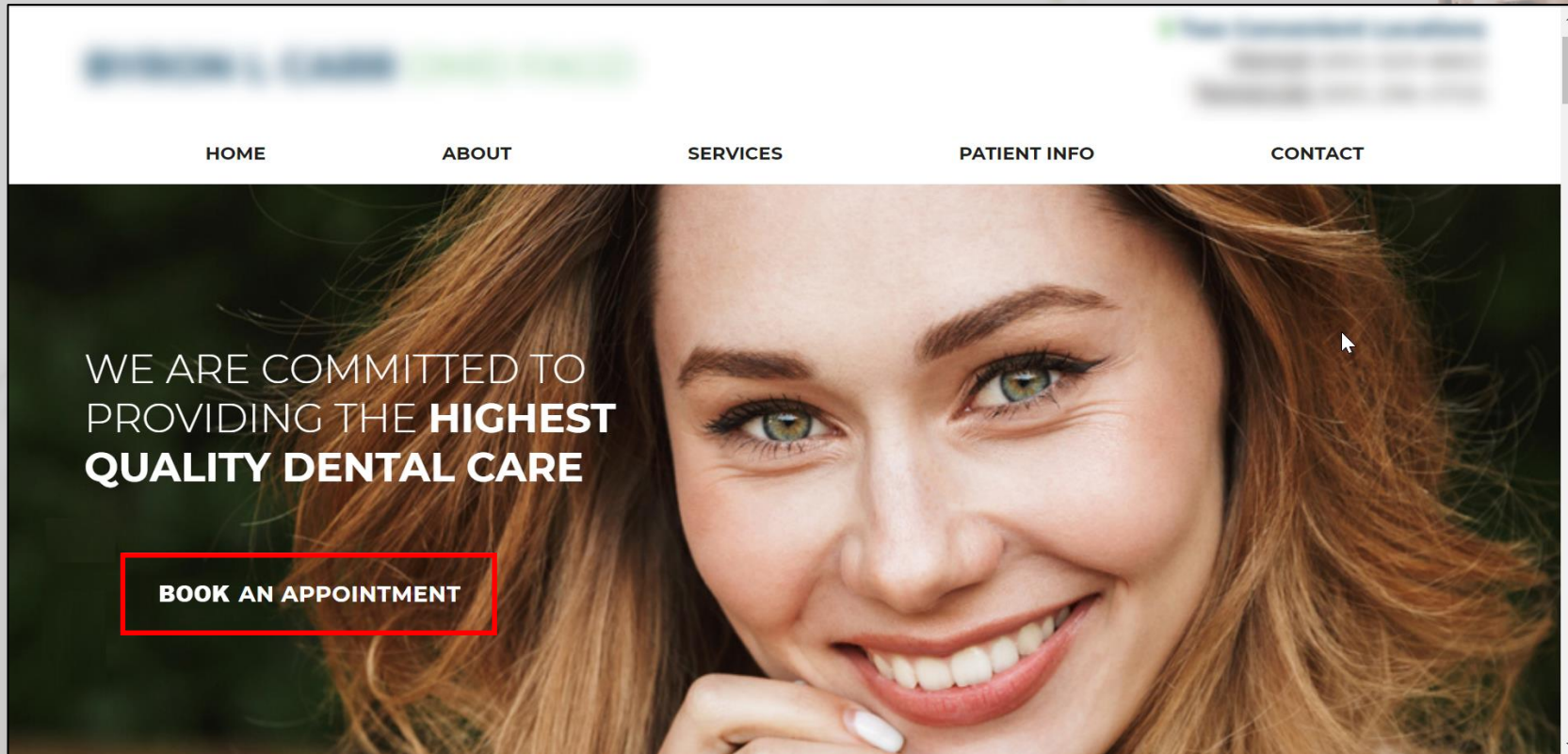


Demo: Online Booking in Action

Jennifer Baker has recently moved to your town and is looking for a new dentist. It's after hours, and she sees a link on your website.

1

She clicks on the online booking link.



2 She selects New Patient

Evans Family Dent... | 2202 El Evans St., Los Angeles, CA 9... · (123) 123-1234

Book An Appointment

How can we help you?

1 ————— 2 ————— 3

This appointment is for:

New Patient

Returning Patient

Location:

Evans Family Dental
2202 El Evans St, Los Angeles, CA 90006

Continue

3 She then selects the treatment type, provider, and appointment time.

Evans Family Dent... | 2202 El Evans St., Los Angeles, CA 9... | (123) 123-1234

Book An Appointment

How can we help you?

← BACK

1 ————— 2 ————— 3

1 Reason for your visit:
Select a Reason

2 Provider:
Any provider

3 Available Time

April - May, 2021

	THU 29	FRI 30	SAT 1	SUN 2	MON 3
9 AM		9:00 AM			9:00 AM
		9:30 AM			9:30 AM
10 AM		10:00 AM			10:00 AM

- Time slots are based on the availability of the chosen provider and appointment type.

4 She enters her personal information.

Evans Family Dent... | 2202 El Evans St., Los Angeles, CA 9... | (123) 123-1234

1 ————— 2 ————— 3

Appointment Information

Location:

Evans Family Dental
2202 El Evans St, Los Angeles, CA 90006

< Edit

Provider:

Dennis Smith

< Edit

Reason for your visit:

New Patient Exam

< Edit

Appointment Date & Time:

Friday, April 30, 2021 at 09:00 AM

Patient Information

First Name*
First Name

Last Name*
Last Name

Date of Birth*
Date of Birth

Email*
email@example.com

Phone Number*
555-555-5555

Comments
Please do not enter any Protected Health Information (PHI).
0/400 characters used

I'm not a robot

reCAPTCHA
Privacy - Terms

- Online Booking in Patient Engage requires patients to provide this information **BEFORE** booking.
- Any additional information that she adds will be added to the Notes section in the Appointment Book.

Appointment Information - (Smith, Becky) <New Patient>

Provider: PERI >... Continuing Care: >...
 Add'l Provider: >... Use Reason to Auto Update CC

Reason: Initial [] Tx [] Misc. [] Delete [] Del. All []

Appointment Description: **New Patient Exam** Appt Length: 60 min >...

Amount: 0.00 Status: <none> Op: OP-7 >...
 Eligible: [] Schedule: FIXED Date: 04/21/2021 >...
 Staff: >... Type: <none> Time: 10:30am >...

Notes: **I have a toothache that I want to get checked out. It hurts when I bite down.**

Confirmed Pre-Med X-rays Requested More Appts Schd Other Family Appts
 Office Re-schd X-rays Received Update Health Hist HIPAA Signed
 Patient Re-schd Sent New Patient Pkg Update Ins Info Review Finances

Enter New Patient Information

3 Last: Smith First: Becky MI: []
 Name: Smith Becky
 Home #: [] Mobile #: (801)555-1234
 Email: abcd12345@gmail.com

Street: []
 Address: []
 City: [] ST: [] Zip: [] >...

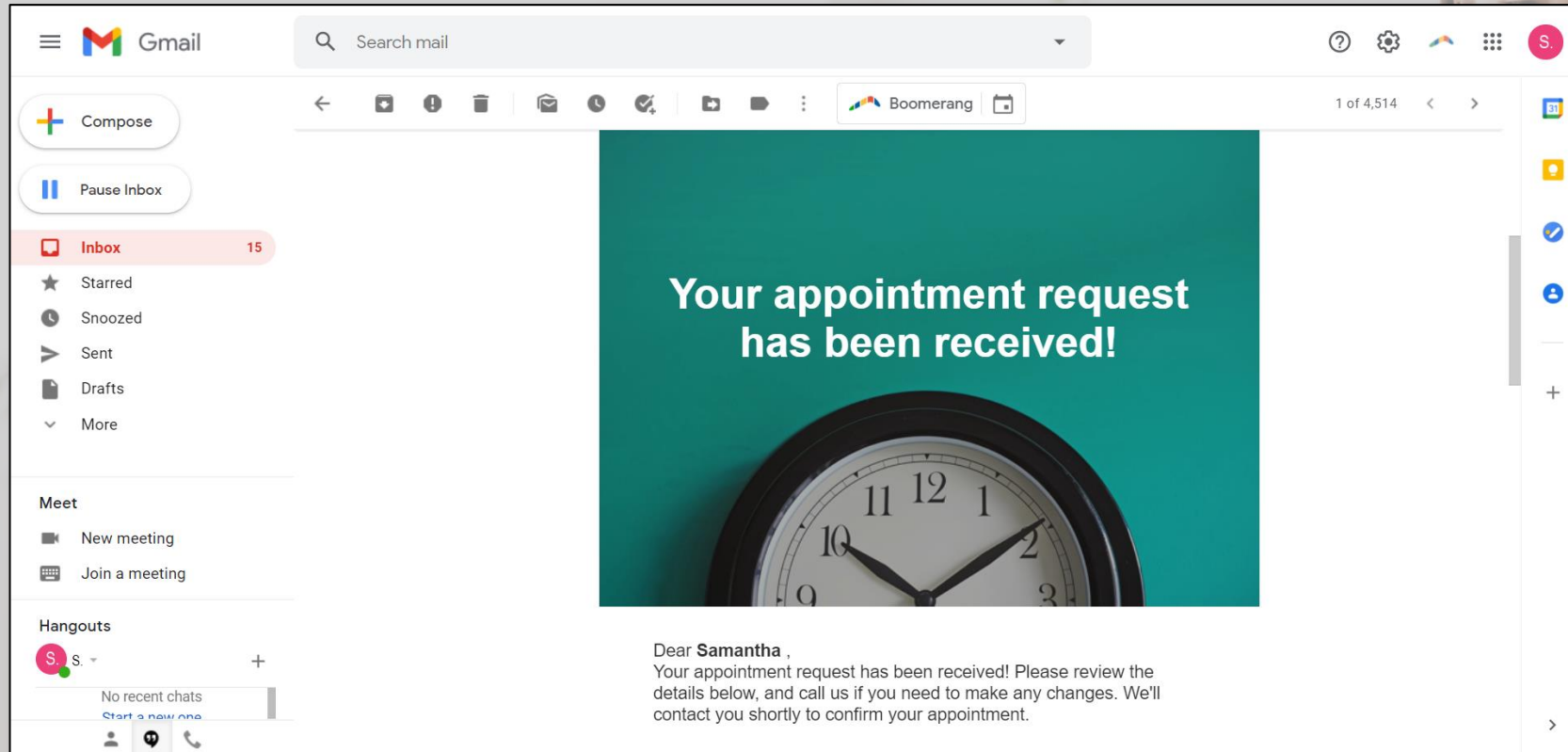
Referred By: [] >... Clear

OK Cancel

5 Patient Engage automatically enters patient information into the correct field in Dentrix.

1. The Appointment Description shows the booking reason
2. Any additional notes are in the Notes section.
3. The patient's info is entered into the correct field.

6 She clicks on the online booking link.



This email includes the following information:

- Your office address
- Provider's name
- Appointment Reason
- Appointment time and date
- Your cancellation policy.



Tip 1: If you're new to online booking, start with new patient appointments.



Tip 1: If you're new to online booking, start with new patient appointments.

- Patient Engage account comes with this booking reason pre-created.
- All you need to do is review the settings and then click a button to activate these booking reasons.

The screenshot shows the 'Booking Settings' page in the Dentrix Hub Portal. The page title is 'Booking Settings' and it includes a '+ CREATE NEW' button. Below the title, there are tabs for 'Booking Reasons' and 'Providers'. A message states: 'You have 5 booking reasons in total, 4 used.' A table lists the booking reasons with their status, number of operators, providers, duration, and appointments. The 'New Patient Exam' row is highlighted with a red box, indicating it is the focus of the tip.

Booking Reason	Status	Operatories	Providers	Duration	Appointments	Action
New Patient Exam New Patients Only	ON	8	16	60 min	6	Edit
Check Up & Cleaning Both New & Returning	OFF	8	21	60 min	1	Edit
Emergency Exam Both New & Returning	OFF	8	21	30 min	2	Edit
Other Both New & Returning	OFF	8	21	60 min	0	Edit



Tip 2: Create custom booking reasons for your unique situation.



Tip 2: Create custom booking reasons for your unique situation.

The screenshot shows the 'Booking Settings' page in the Dentrix Hub Portal. The page title is 'Booking Settings' and it has a '+ CREATE NEW' button highlighted in red. Below the title, there are tabs for 'Booking Reasons' and 'Providers'. A message states 'You have 5 booking reasons in total, 4 used.' The main content area displays a table of booking reasons:

Booking Reason	Operatories	Providers	Duration	Appointments	Action
<input checked="" type="checkbox"/> New Patient Exam New Patients Only	8	16	60 min	6	Edit
<input checked="" type="checkbox"/> Check Up & Cleaning Both New & Returning	8	21	60 min	1	Edit
<input checked="" type="checkbox"/> Emergency Exam Both New & Returning	8	21	30 min	2	Edit
<input checked="" type="checkbox"/> Other Both New & Returning	8	21	60 min	0	Edit



How to Create Custom Booking Reasons



Step 1: Fill out General Info

1. Booking reason name
2. Booking reason description
3. Patient type
4. Booking rules

Dentrix Hub Portal

hub.dentrix.com/OnlineBooking/Settings#/create

Search Patients

GUIDES SETTINGS J Evans

EVANS FAMILY DENTAL

GENERAL

LEADS

Online Booking

COMMUNICATIONS

MARKETING

FINANCIALS

REPUTATION MANAGEMENT

HISTORY

← BACK

Create Booking Reason

General Info Start by adding general information about this booking option you're offering patients.

Booking Reason Name

1 Enter a booking reason name here that is easy for clients to understand

Booking Reason Description

2 Enter a description of the booking reason here that is easy for clients to understand

200 characters remaining

Allow Booking for

3 New Patient Returning Patient Recall

Booking Rules Define how booking will be configured.

Advanced Booking

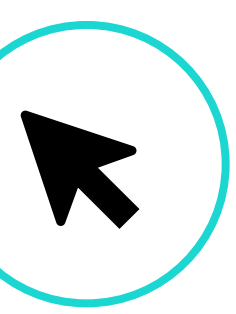
Patients must book at least 0 business days in advance.

Duration

This booking reason will take 30 minutes.

CANCEL SAVE

The last sync was today at 8:32 AM



Step 2: Enable sync and add operatories

1. Sync back to operator system
2. Click **Add Operator**

The screenshot shows the 'Resources' configuration page in the Dentrix Hub Portal. The page is titled 'Resources' and includes a sub-header 'Assign the resources from your practice for this booking reason.' The 'Resources' section contains a 'Configuration Option' with a checkbox for 'Sync back bookings from patients directly to my management system.' and an 'Add Resources' section with a '+ Add Operator' button. The 'Booking Sources' section includes a table for selecting where providers should be available for patients to select.

	Demandforce	consumer portal	Website Module	Dental Plans	Facebook	Google	Yelp	Campaigns	Reminders
DSJ Dennis Smith Junior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DS Dennis Smith	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BC Brenda Childs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PP Paula Pearson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BP Brian Ballard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Step 3: A Pop-up guides you through choosing:

1. Available operators for this booking reason.

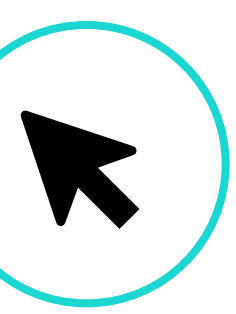
Close (X)

Add Operator

Search by operator name...

- OP-1
- OP-2
- OP-3
- OP-4
- OP-5

CANCEL ADD



Step 3: A Pop-up guides you through choosing:

2. Available providers for this booking reason.

Add Provider(s)

1 — 2 — 3
Select Provider Edit Duration Edit Bookable Hours

- Dennis Smith
- Brenda Childs
- Paula Pearson
- Steve Sorensen

CANCEL CONTINUE



Step 3: A Pop-up guides you through choosing:

3. The appointment duration.

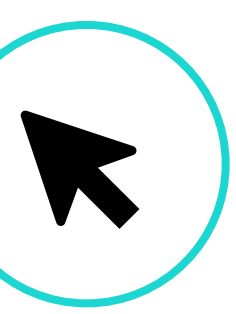
Add Provider(s)

1 ————— 2 ————— 3
Select Provider Edit Duration Edit Bookable Hours

Custom

This booking reason will take 45 minutes
When you select a custom duration, this will override the default set for this booking reason.

CANCEL CONTINUE



Step 3: A Pop-up guides you through choosing:

4. The time's available for booking.

Add Provider(s)

1 — 2 — 3
Select Provider Edit Duration Edit Bookable Hours

Custom

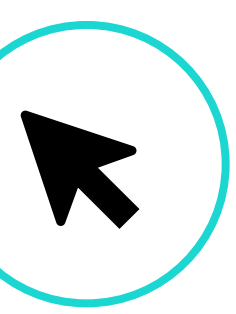
Custom Schedule name
Add a name for this schedule
50 characters remaining

Which hours are you available for bookings?
9:00 AM to 5:00 PM
+ Add hours

Which days are you available for these hours?
S M T W T F S
APPLY

SUN	Not Available
MON	Not Available
TUE	Not Available
WED	Not Available
THU	Not Available
FRI	Not Available
SAT	Not Available

CANCEL ADD



Step 4: Select the Booking Sources

- Select the booking sources for each provider

The screenshot shows the 'Resources' configuration page in the Dentrix Hub Portal. The 'Booking Sources' section is highlighted with a red border. It contains a table with the following data:

	Demandforce	consumer portal	Website Module	Dental Plans	facebook	Google	yelp	Campaigns	Reminders
Dennis Smith Junior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dennis Smith	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brenda Childs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Paula Pearson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brian Ballard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Step 5: Add additional instructions

1. Add any special instructions for this appointment
2. Add your cancellation policy
3. Click save

The screenshot displays the 'DENTRIX HUB' interface for 'EVANS FAMILY DENTAL'. The left sidebar contains navigation menus for 'GENERAL', 'LEADS', 'Online Booking', 'COMMUNICATIONS', 'MARKETING', and 'FINANCIALS'. The main content area is titled 'Search Patients' and includes a 'Booking Sources' section. Two sections are highlighted with red boxes and numbered: '1' points to the 'Special Instruction' section, which includes a text input field for 'Instruction Content' (400 characters limit) and a placeholder 'Type your instruction for this appointment here'; '2' points to the 'Cancellation Policy' section, which includes a text input field for 'Policy Content' (400 characters limit) and a placeholder 'Type your cancellation policy for this appointment here'. At the bottom right, a 'CANCEL' button and a 'SAVE' button are visible, with the 'SAVE' button highlighted by a red box and the number '3'. The footer contains the copyright notice: 'Copyright © 2021 by MH Sub I, LLC. All rights reserved.'



Tip 3: You can speed things up
by creating multiple bookings
at once.



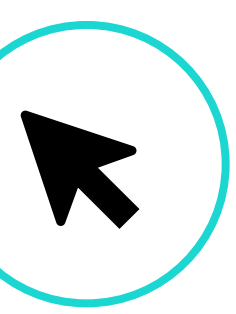
Tip 3: You can speed things up by creating multiple bookings at once.

The screenshot shows the 'Booking Settings' page in the Dentrix Hub Portal. The page title is 'Booking Settings' and the user is logged in as 'J Evans'. The page has a sidebar with navigation options: 'EVANS FAMILY DENTAL', 'GENERAL', 'LEADS', 'Online Booking', 'COMMUNICATIONS', 'MARKETING', 'FINANCIALS', and 'REPUTATION MANAGEMENT'. The 'Online Booking' section is active. The main content area shows a table of booking reasons. A '+ CREATE NEW' button is highlighted with a red box. The table lists the following booking reasons:

Booking Reason	Status	Operatories	Providers	Duration	Appointments	Action
New Patient Exam New Patients Only	ON	8	16	60 min	6	Edit
Check Up & Cleaning Both New & Returning	ON	8	21	60 min	1	Edit
Emergency Exam Both New & Returning	ON	8	21	30 min	2	Edit
Other Both New & Returning	ON	8	21	60 min	0	Edit



How to Create Multiple Booking Reasons at Once



Step 1: In the Booking Settings, click **+CREATE NEW**

Search Patients

GUIDES SETTINGS J Evans

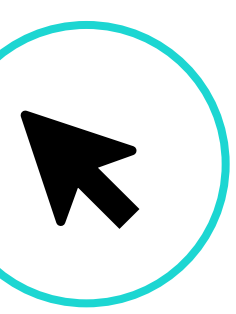
Booking Settings

+ CREATE NEW

Booking Reasons Providers

You have 5 booking reasons in total, 4 used.

Booking Reason	Operatories	Providers	Duration	Appointments	Action
<input checked="" type="checkbox"/> New Patient Exam New Patients Only	8	16	60 min	6	Edit
<input checked="" type="checkbox"/> Check Up & Cleaning Both New & Returning	8	21	60 min	1	Edit
<input checked="" type="checkbox"/> Emergency Exam Both New & Returning	8	21	30 min	2	Edit
<input checked="" type="checkbox"/> Other Both New & Returning	8	21	60 min	0	Edit



Step 2: Select Multiple Booking Reasons

- To save time during setup, you can create multiple bookings at once.

The screenshot displays the 'Booking Settings' interface in the Dentrix Hub Portal. The page title is 'Booking Settings' and the sub-tab is 'Booking Reasons'. A blue '+ CREATE NEW' button is visible in the top right. A dropdown menu is open, showing two options: 'Multiple Booking Reasons' (highlighted with a red box) and 'Single Booking Reason'. Below the dropdown, a message states 'You have 5 booking reasons in total, 4 used.' The main content area contains a table of booking reasons:

Status	Reason Name	Sub-Name	Operatories	Providers	Duration	Appointments	Action
ON	New Patient Exam	New Patients Only	8	16	60 min	6	Edit
ON	Check Up & Cleaning	Both New & Returning	8	21	60 min	1	Edit
ON	Emergency Exam	Both New & Returning	8	21	30 min	2	Edit
ON	Other	Both New & Returning	8	21	60 min	0	Edit

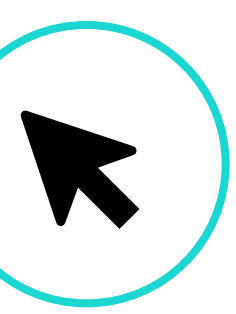


Step 3: Select booking reasons

- Select all the booking reasons that you want patients to schedule on their own

The screenshot shows the 'Create New Booking Reasons' page in the Dentrix Hub Portal. The page title is 'Create New Booking Reasons' and the sub-header is 'Booking Reasons'. The main heading is 'What Booking Reasons do you offer?' with a note: 'Note that this is a list of default options. What you choose will be provided to your patients as options when booking an appointment.' A red box highlights the selected booking reasons: Broken Tooth, Dental Cleaning, Dental Consultation, and Dental Emergency. The 'NEXT' button is visible at the bottom right.

Booking Reason	Selected
Broken Tooth	Yes
Braces / Retainer Checkup	No
Bridge	No
Broken Tooth	Yes
Cavities	No
Crown	No
Dental Abscess	No
Dental Bone Graft	No
Dental Cleaning	Yes
Dental Consultation	Yes
Dental Emergency	Yes
Dental Follow Up	No



Step 4: Add details

1. Select the type of patient that can book this treatment
2. Fill out the Booking Duration

Provide some details about these booking reasons.
These details will determine the options available to your patients.

	1 New Patients Can Book	Returning Patients Can Book	2 Booking Duration	
Apply to All Booking Reasons	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	— minutes	
Broken Tooth	<input type="checkbox"/>	<input checked="" type="checkbox"/>	60 minutes	
Dental Cleaning	<input type="checkbox"/>	<input checked="" type="checkbox"/>	45 minutes	
Dental Consultation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30 minutes	
Dental Emergency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	45 minutes	

[+ Add A New Reason](#)

[BACK](#) [NEXT](#)



Step 5: Assign operators

- Select operators for each treatment type

Dentrix Hub Portal

hub.dentrix.com/OnlineBooking/Settings?page=bookingWizard#/

Search Patients

GUIDES SETTINGS Justin Evans

Create New Booking Reasons

Operators

Select the operators you perform these booking reasons in.
This information will not be seen by patients, but will help determine availability.

Broken Tooth

OP-1 x OP-2 x OP-3 x

Dental Cleaning

OP-4 x OP-5 x

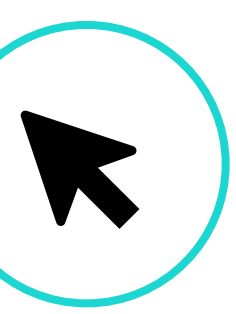
Dental Consultation

OP-4 x OP-5 x

Dental Emergency

BACK NEXT

Last synced 1 day ago.



Step 6: Assign Providers

- Assign providers to each operator and booking reason

The screenshot shows the 'Dentrix Hub Portal' interface. The left sidebar contains a navigation menu with categories: EVANS FAMILY DENTAL, GENERAL, LEADS, Online Booking (selected), COMMUNICATIONS, MARKETING, FINANCIALS, and REPUTATION MANAGEMENT. The main content area is titled 'Select which providers perform these booking reasons.' and includes a sub-section for 'Broken Tooth'. This section contains three rows, each for an operator (OP-1, OP-2, OP-3). Each row has a search input field with 'Dennis Smith' and 'David Strickland' selected, and a 'NEXT' button at the bottom right. A red rectangular box highlights the OP-1, OP-2, and OP-3 rows.



Step 7: Review and customize

1. See how your bookings look to patients
2. Customize additional settings

Dentrix Hub Portal

hub.dentrix.com/OnlineBooking/Settings?page=bookingWizard#/

Search Patients

GUIDES SETTINGS Justin Evans

Great! You've just created the following booking reasons in Online Booking:
Broken Tooth, Dental Cleaning, Dental Consultation, and Dental Emergency

1 Preview What You Created

- See how the booking reasons will look for your patients when they use Online Booking
- Make sure everything is consistent with how you expected it to look
- Don't worry, you can edit and customize further after you're done

PREVIEW

2 Customize Before Previewing

- Create provider schedules around specific booking reasons
- Select which websites you'd like to add the Online Booking widget to
- Add a cancellation policy and instructions for specific booking reasons... and more

CUSTOMIZE

Last synced 1 day ago.

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Tip 4: Use Settings to
customize your booking setup



Where to Find It

Booking slot intervals – patients can schedule every hour or every half hour.

The screenshot shows the 'Settings' page for 'General Booking Configuration'. The 'Booking Slot Interval' setting is highlighted with a red box. It is set to '30 minutes' and is described as 'When patient select appointment time, show slots every 30 minutes on my booking calendar.' Other settings include 'Booking Temporary Hold' set to 4 business hours, and 'Reduce Booking Gaps' which is checked to 'Automatically adjust my booking time slots to reduce gaps in between appointments.'

Search Patients

GUIDES SETTINGS TEXTS Justin Evans

← BACK

Settings

General Info

- Saved Schedules
- Special Hours
- Custom Sources
- Email Notifications
- Display Order

General Booking Configuration

Booking Slot Interval

When patient select appointment time, show slots every on my booking calendar.

Booking Temporary Hold

When patients request a booking, hold that booking for business hours. ⓘ

Between 1-24 hours

Reduce Booking Gaps

Automatically adjust my booking time slots to reduce gaps in between appointments. ⓘ

Saved Schedule How appointment slots will be shown to patients. + ^

CANCEL SAVE



Where to Find It

Booking temporary holds – Patient Engage holds appointment times for ___ hours after a patient requests a booking.

The screenshot shows the 'Settings' page in the Patient Engage interface. The 'General Booking Configuration' section is expanded, and the 'Booking Temporary Hold' option is highlighted with a red box. The configuration shows that when patients request a booking, it will be held for 4 business hours. The 'Booking Slot Interval' is set to 30 minutes, and the 'Reduce Booking Gaps' checkbox is checked.

Search Patients

GUIDES SETTINGS TEXTS Justin Evans

← BACK

Settings

- General Info
- Saved Schedules
- Special Hours
- Custom Sources
- Email Notifications
- Display Order

General Booking Configuration

Booking Slot Interval

When patient select appointment time, show slots every 30 minutes on my booking calendar.

Booking Temporary Hold

When patients request a booking, hold that booking for 4 business hours.

Reduce Booking Gaps

Automatically adjust my booking time slots to reduce gaps in between appointments.

Saved Schedule

How appointment slots will be shown to patients.

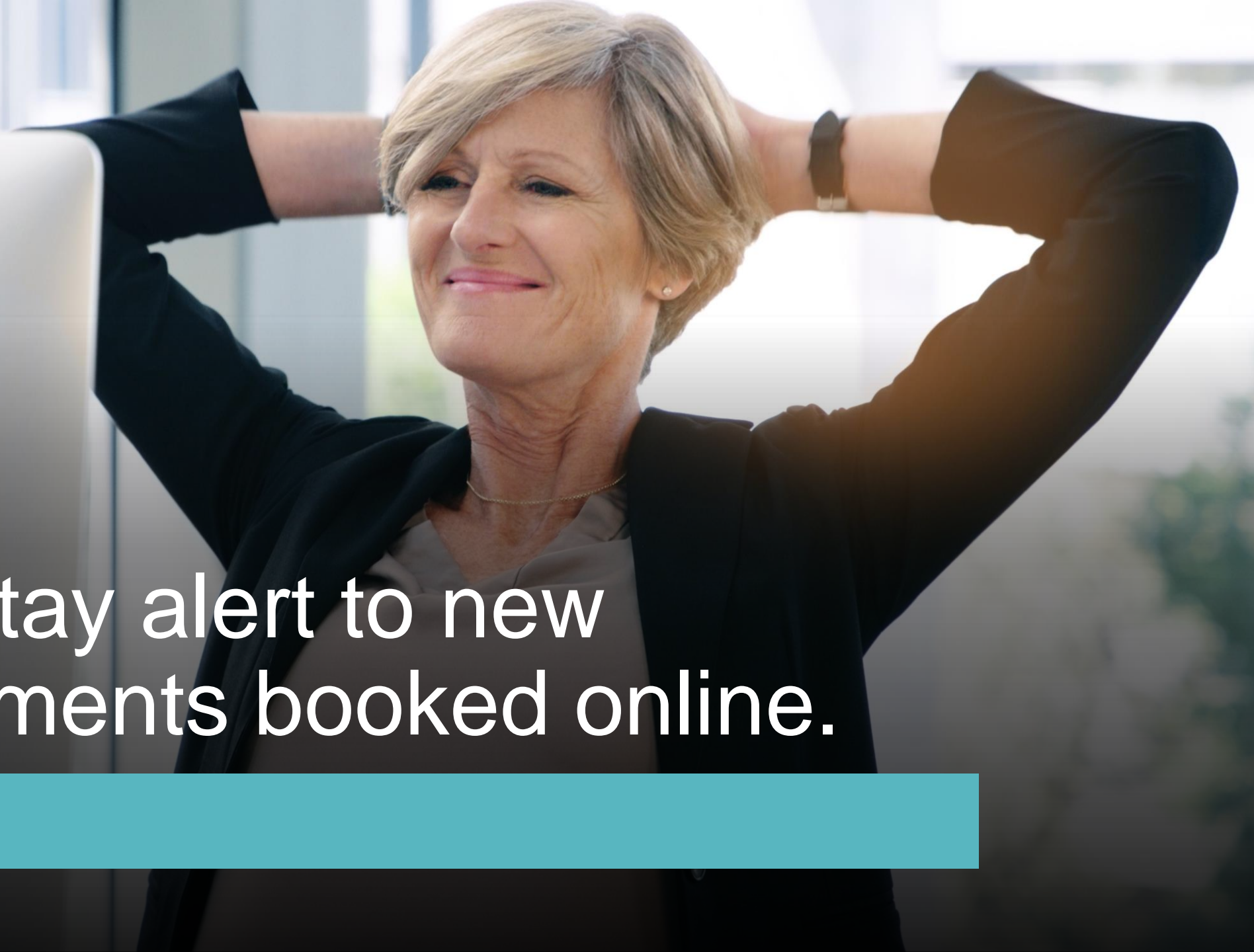
CANCEL SAVE



Where to Find It

Reduce appointment gap – automatically adjust your booking time slots to reduce gaps between appointments.

The screenshot shows the 'Settings' page in a web application. The top navigation bar includes a search bar labeled 'Search Patients', and links for 'GUIDES', 'SETTINGS', and 'TEXTS'. The user's name 'Justin Evans' is visible in the top right. The main content area is titled 'Settings' and has a 'BACK' button. A sidebar on the left lists various settings categories: 'General Info' (highlighted), 'Saved Schedules', 'Special Hours', 'Custom Sources', 'Email Notifications', and 'Display Order'. The 'General Booking Configuration' section is expanded, showing options for 'Booking Slot Interval' (set to 30 minutes), 'Booking Temporary Hold' (set to 4 business hours), and 'Reduce Booking Gaps'. The 'Reduce Booking Gaps' option is checked with a blue checkmark and is highlighted by a red rectangular box. Below this section is the 'Saved Schedule' section. At the bottom right of the settings area are 'CANCEL' and 'SAVE' buttons.



Tip 5: Stay alert to new appointments booked online.



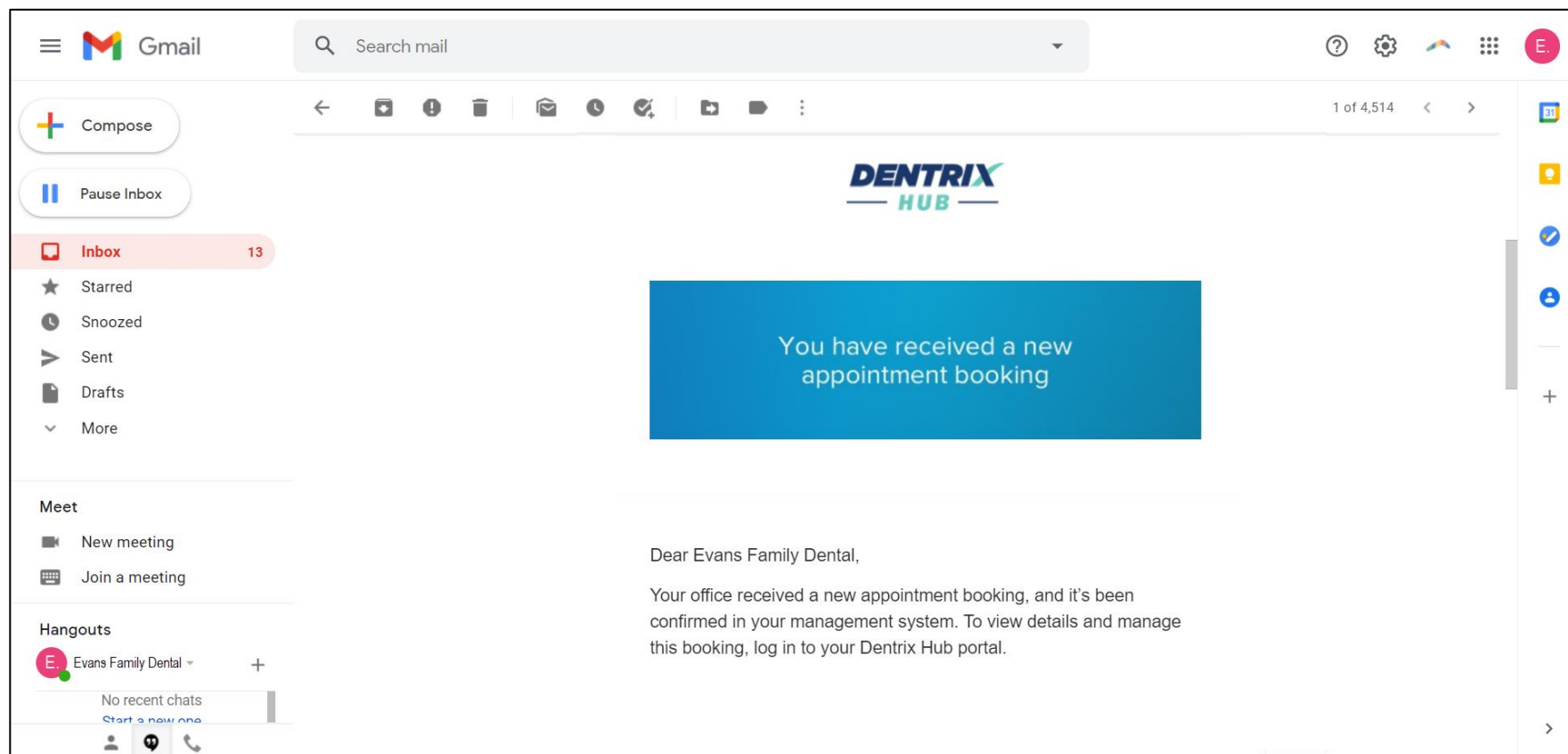


Where to Find It

You can see appointments booked online in 3 places:

1) Email

- When a patient books an appointment online, you receive an email.



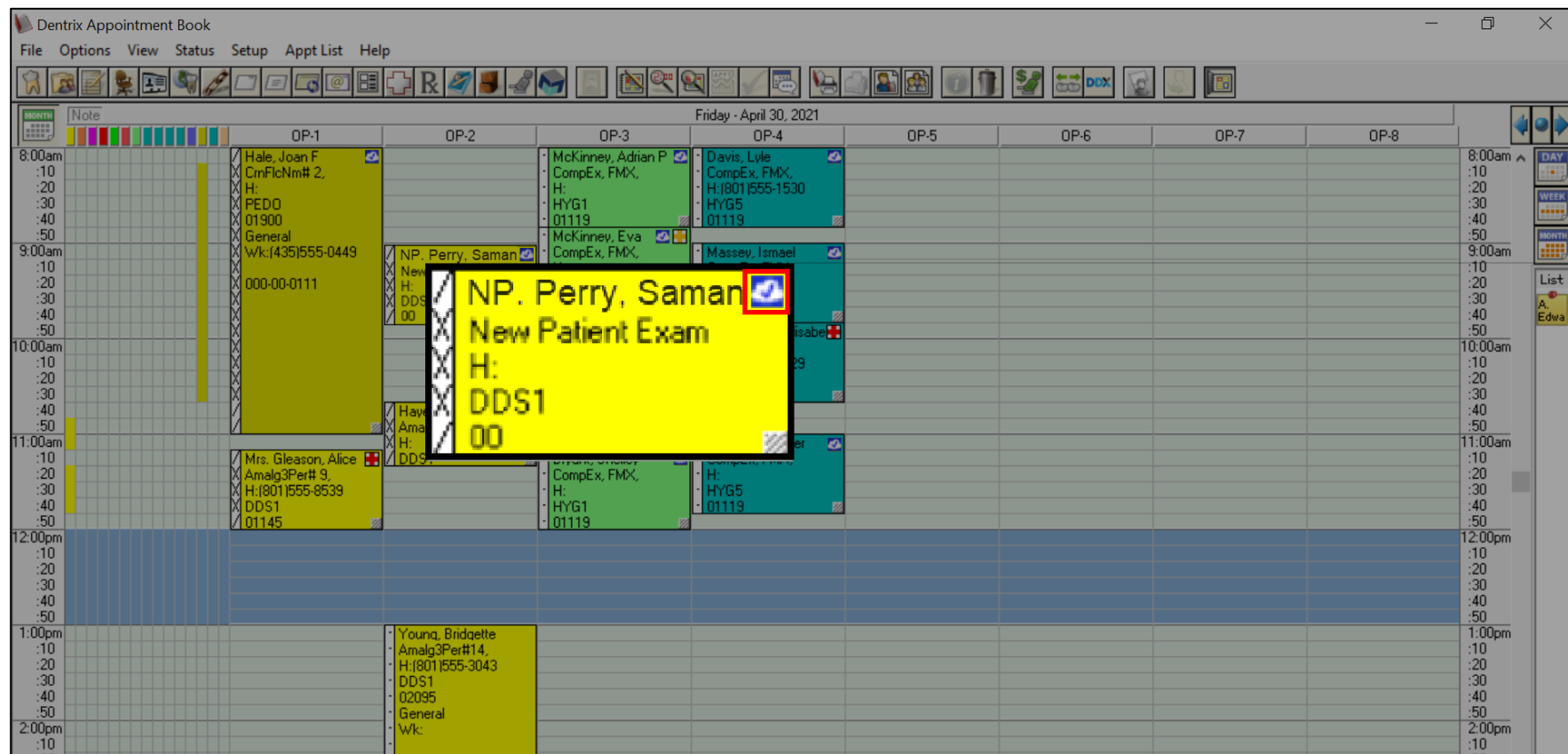


Where to Find It

You can see appointments booked online in 3 places:

2) Dentrix

- Appointments booked online show up automatically in the Appointment Book.





Where to Find It

You can see appointments booked online in 3 places:

3) Booking Center

- In the booking center, you can view all appointments scheduled online.

DENTRIX HUB

EVANS FAMILY DENTAL

GENERAL

LEADS

Online Booking

COMMUNICATIONS

MARKETING

FINANCIALS

REPUTATION MANAGEMENT

The last sync was today at 7:00 PM

Search Patients

GUIDES SETTINGS TEXTS Justin Evans

All Bookings

Received Time	Name	Booking Reason	Provider	Source	Status
04/29/21 9:21 PM	New Patient Michael Snyder	New Patient Exam	Dennis Smith	Campaigns	Sync Error
04/29/21 9:18 PM	New Patient Samantha Perry	New Patient Exam	Dennis Smith	Campaigns	Scheduled
04/19/21 3:40 PM	New Patient Randall Smith	New Patient Exam	Paula Pearson	Campaigns	Scheduled
04/16/21 3:29 PM	New Patient Lola Wagstaff	New Patient Exam	Susan Jones	Campaigns	Scheduled
04/05/21 1:20 PM	New Patient Jessica Murfee	New Patient Exam	Dennis Smith	Demandforce Campaigns	Scheduled

Page 1 of 3

Items per page: 5

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NOTE: Patient Engage converts sync errors into appointment requests

- You and the patient receive an email notifying you of the request.
- You can easily Accept or Reschedule the appointment request.

The screenshot shows the DENTRIX HUB interface for 'EVANS FAMILY DENTAL'. The left sidebar contains navigation menus for GENERAL, LEADS, COMMUNICATIONS, MARKETING, FINANCIALS, and REPUTATION MANAGEMENT. The 'LEADS' menu is expanded to show 'Online Booking'. The main content area displays a table titled 'All Bookings' with columns for Received Time, Name, Booking Reason, Provider, Source, and Status. The first row is highlighted with a red border and shows a 'Sync Error' status with a warning icon and an information icon. The other rows show 'Scheduled' status with green checkmarks. The bottom of the interface includes pagination controls (Page 1 of 3) and a footer with the copyright notice: 'Copyright © 2021 by MH Sub I, LLC. All rights reserved.'

Received Time	Name	Booking Reason	Provider	Source	Status
04/29/21 9:21 PM	New Patient Michael Snyder	New Patient Exam	Dennis Smith	Campaigns	⚠ Sync Error ⓘ
04/29/21 9:18 PM	New Patient Samantha Perry	New Patient Exam	Dennis Smith	Campaigns	✅ Scheduled
04/19/21 3:40 PM	New Patient Randall Smith	New Patient Exam	Paula Pearson	Campaigns	✅ Scheduled
04/16/21 3:29 PM	New Patient Lola Wagstaff	New Patient Exam	Susan Jones	Campaigns	✅ Scheduled
04/05/21 1:20 PM	New Patient Jessica Murfee	New Patient Exam	Dennis Smith	Demandforce Campaigns	✅ Scheduled



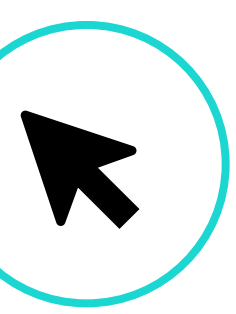
How to Accept an Appointment Request



Step 1: Select the side arrow by the appointment

The screenshot displays the DENTRIX HUB interface for 'EVANS FAMILY DENTAL'. The left sidebar contains navigation options: GENERAL, LEADS, Online Booking (selected), COMMUNICATIONS, MARKETING, FINANCIALS, and REPUTATION MANAGEMENT. The main content area shows 'All Bookings' with a search bar and a table of appointments. The table has columns for Received Time, Name, Booking Reason, Provider, Source, and Status. The first row, for Michael Snyder, has a 'Sync Error' status and a right-pointing arrow highlighted with a red box. Other rows show 'Scheduled' status with green checkmarks. At the bottom, there is a pagination control showing 'Page 1 of 3' and an 'Items per page' dropdown set to 5.

Received Time	Name	Booking Reason	Provider	Source	Status	
04/29/21 9:21 PM	New Patient Michael Snyder	New Patient Exam	Dennis Smith	Campaigns	⚠ Sync Error ⓘ	➤
04/29/21 9:18 PM	New Patient Samantha Perry	New Patient Exam	Dennis Smith	Campaigns	✅ Scheduled	➤
04/19/21 3:40 PM	New Patient Randall Smith	New Patient Exam	Paula Pearson	Campaigns	✅ Scheduled	➤
04/16/21 3:29 PM	New Patient Lola Wagstaff	New Patient Exam	Susan Jones	Campaigns	✅ Scheduled	➤
04/05/21 1:20 PM	New Patient Jessica Murfee	New Patient Exam	Dennis Smith	Demandforce Campaigns	✅ Scheduled	➤



Step 2: Click to accept the appointment

- You can also click to reschedule, flag for review, and cancel hold.

The screenshot displays the DENTRIX HUB interface for a patient named Michael Snyder. The left sidebar shows navigation options: EVANS FAMILY DENTAL, GENERAL, LEADS, Online Booking (highlighted), COMMUNICATIONS, MARKETING, FINANCIALS, and REPUTATION MANAGEMENT. The main content area shows appointment details for 04/29/21 at 9:21 PM. A warning message states: "We had problems syncing this appointment to your management system." The details are organized into three columns: Patient Information (Name: Michael Snyder, Patient Type: New Patient, Date Of Birth: 4/23/1978, Email: Snyder13425@gmail.com, Phone Number: 4355557894, Comments: No Comment), Booking Information (Status: Sync Error, Appointment Date: April 30, 2021, Appointment Time: 10:00 AM, Received Time: April 29, 2021 at 9:21 PM, Booking Reason: New Patient Exam, Provider: Dennis Smith, Source: Campaigns), and Notes (+ ADD NOTE). At the bottom, there is a table of appointments with an "ACCEPT" button highlighted in red. A dropdown menu is open, showing options: Flag For Review, Reschedule, Cancel Hold, and Delete. The table lists two appointments: one on 04/29/21 at 9:18 PM with a "Sync Error" status, and another on 04/19/21 at 3:40 PM with a "Scheduled" status.



Step 3: Manually add the appointment to the Appointment Book

Dentrix Appointment Book

File Options View Status Setup Appt List Help

Friday - April 30, 2021

OP-1 OP-2 OP-3 OP-4 OP-5 OP-6 OP-7 OP-8

8:00am :10 :20 :30 :40 :50

9:00am :10 :20 :30 :40 :50

10:00am :10 :20 :30 :40 :50

11:00am :10 :20 :30 :40 :50

12:00pm :10 :20 :30 :40 :50

1:00pm :10 :20 :30 :40 :50

2:00pm :10

Enter New Patient Information

Last First MI

Name:

Home #: Mobile #:

Email:

Street

Address:

City ST Zip >...

Referred By: >... Clear

OK Cancel

Hale, Joan F
CmFicNm# 2,
H:
PEDD
01900
General
Wk:(435)555-0449
000-00-0111

Mrs. Gleason, Alice
Amalg3Per# 9,
H:(801)555-8539
DDS1
01145

DDS1
02095
General
Wk:



Tip 6: Find out what's already working, then do more of it.



Tip 6: Find out what's already working, then do more of it.

- With data analytics, most people focus on improving what isn't working.
- You'll get better results by starting with what's already going well.





Tip 6: Find out what's already working, then do more of it.

- These numbers tell a story.
- They show you how your current patients and new patient pool prefer contact.
- These numbers don't tell you anything about your future patients. Things change!





How to Navigate the Online Booking Dashboard



Where to Find It

This shows the total number of appointments booked online.

DENTRIX HUB
EVANS FAMILY DENTAL

Search Patients

GUIDES SETTINGS TEXTS Justin Evans

Booking Center

13 TOTAL
3 Synced

12
New Patient
3 Synced

1
Returning Patient
0 Synced

- Demandforce Campaigns 54%
- Campaigns 31%
- Demandforce 8%
- Google 8%

4 TOTAL
4 Sources

TOP BOOKING REASONS

- 46% New Patient Exam
- 15% Emergency Exam
- 8% Check Up & Cleaning

All Bookings

Received Time	Name	Booking Reason	Provider	Source	Status
04/29/21 9:21 PM	New Patient Michael Snyder	New Patient Exam	Dennis Smith	Campaigns	Sync Error

The last sync was today at 7:45 AM



Where to Find It

This shows the total number of new vs. returning patients.

EVANS FAMILY DENTAL

Search Patients

GUIDES SETTINGS TEXTS Justin Evans

Booking Center

13 TOTAL
3 Synced

12 New Patient
3 Synced

1 Returning Patient
0 Synced

- Demandforce Campaigns 54%
- Campaigns 31%
- Demandforce 8%
- Google 8%

4 TOTAL
4 Sources

TOP BOOKING REASONS

- 46% New Patient Exam
- 15% Emergency Exam
- 8% Check Up & Cleaning

All Bookings

Received Time	Name	Booking Reason	Provider	Source	Status
04/29/21 9:21 PM	New Patient Michael Snyder	New Patient Exam	Dennis Smith	Campaigns	Sync Error

The last sync was today at 7:45 AM



Where to Find It

This shows where your bookings are currently coming from...

- Facebook
- Website
- Email campaigns
- Google
- etc.

DENTRIX HUB
EVANS FAMILY DENTAL

Search Patients

GUIDES SETTINGS TEXTS Justin Evans

Booking Center

13 TOTAL 3 Synced
12 New Patient 3 Synced
1 Returning Patient 0 Synced

4 TOTAL 4 Sources

- Demandforce Campaigns 54%
- Campaigns 31%
- Demandforce 8%
- Google 8%

TOP BOOKING REASONS

- 46% New Patient Exam
- 15% Emergency Exam
- 8% Check Up & Cleaning

All Bookings

Received Time	Name	Booking Reason	Provider	Source	Status
04/29/21 9:21 PM	New Patient Michael Snyder	New Patient Exam	Dennis Smith	Campaigns	Sync Error

The last sync was today at 7:45 AM



Where to Find It

This shows you, by percentage, your top booking reasons.

DENTRIX HUB
EVANS FAMILY DENTAL

Search Patients

GUIDES SETTINGS TEXTS Justin Evans

Booking Center

13 TOTAL 3 Synced
12 New Patient 3 Synced
1 Returning Patient 0 Synced

4 TOTAL 4 Sources

- Demandforce Campaigns 54%
- Campaigns 31%
- Demandforce 8%
- Google 8%

TOP BOOKING REASONS

- 46% New Patient Exam
- 15% Emergency Exam
- 8% Check Up & Cleaning

All Bookings

Received Time	Name	Booking Reason	Provider	Source	Status
04/29/21 9:21 PM	New Patient Michael Snyder	New Patient Exam	Dennis Smith	Campaigns	Sync Error

The last sync was today at 7:45 AM

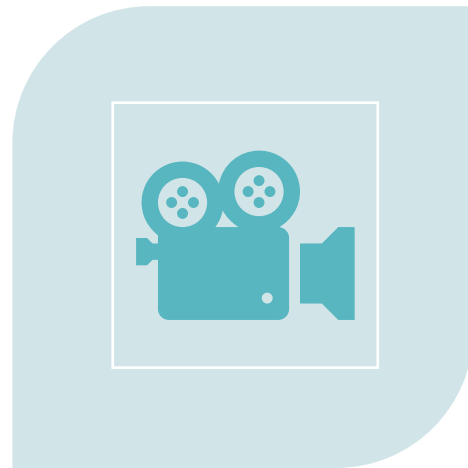
After today's presentation, how confident are you with online booking?

- Very confident
- Somewhat confident
- Not very confident
- Not at all confident, HELP!

Q&A

Learn More

Something to watch:



[Online Booking Overview](#)

Something to read:



[Make Online Booking Work for You](#)

For help setting up
Online Booking

call: **866-739-7695**

To schedule a 1-on-1 with one of our
certified trainers.

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or call your Account Executive at: **833.425.0421**

