

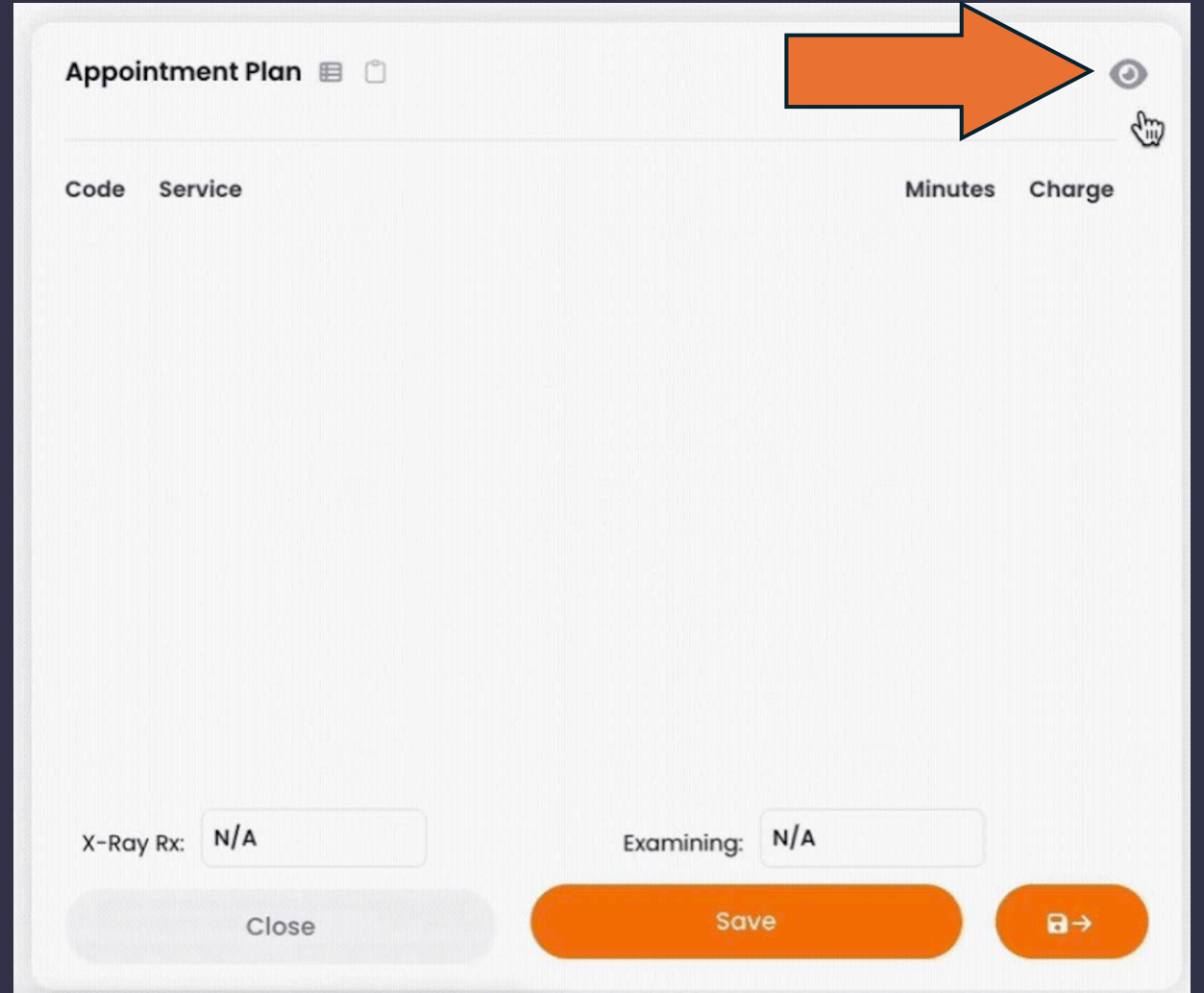
Transfer Plan from PMS

Note: This is applicable on only a few PMSs e.g. Dentrix and OpenDental

Navigate to the
Appointment Plan

Select the **eyeball icon**

Review and adjust as
needed



The screenshot shows the 'Appointment Plan' interface. At the top, there is a header 'Appointment Plan' with a list icon and a clipboard icon. Below this is a table with columns 'Code', 'Service', 'Minutes', and 'Charge'. The table is currently empty. At the bottom of the interface, there are two input fields: 'X-Ray Rx:' with the value 'N/A' and 'Examining:' with the value 'N/A'. Below these fields are three buttons: 'Close' (grey), 'Save' (orange), and a button with a lock icon and a right arrow (orange). An orange arrow points from the top right towards the eyeball icon in the top right corner of the interface.

Code	Service	Minutes	Charge
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X-Ray Rx: N/A

Examining: N/A

Close Save [Lock Icon]



In Dental Management System select the back arrow

In Appointment Plan select Save



← Dental Management System

Code	Service	Status	Provider	Charge
CNote	ClinNote : Clinical Note	P	Erin	-
01202	Recare Exam : Exam & diag. limited oral previous patient, recall	P	E. Mitchel	\$44
11113	Scale, 3 units : Scaling three units	P	Erin	\$200
12113	VFlo : Varnish Fluoride	P	Erin	\$38
11107	11107 : Polishing 1/2 Unit of Time	P	Erin	\$29

