

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

How do I register a new patient and schedule them in OP 19?

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After confirming a patient record does not already exist in your system, a new patient can be registered one of two ways in OP 19. The workflow can be initiated from:

- The **Patient Chart** button in the **Clinical, Practice Management, or Billing** tab. Click [here](#) for detailed instructions on registering a patient using this method.

Note: To enter a placeholder on the desired appointment time slot while completing the patient's registration:

1. Click once in the offered time slot.
2. Type a note, such as: Hold for new patient, or simply Hold. That time slot will now be reserved.
3. Proceed with registering the new patient.
4. Return to the Schedule and double-click the reserved time slot. The **Add/Edit Appointment** window opens.
5. Search for and select the new patient. Upon selecting the new patient, the **Appt text** field will populate with that patient's information rather than the placeholder note you entered.

If the new patient decided to not schedule an appointment at this time, simply select the placeholder, right-click and select **Delete appointment**.

- The **Schedule** via the **Add/Edit Appointment** window. To schedule a new patient using this method:
 1. Navigate to the **Calendar** and double-click on the desired time slot. The Add/Edit Appointment window opens.
 2. Conduct a patient search to ensure the patient does not already have a record in your system.
 3. Click the **Create a New Patient with Appointment** button  .

4. Complete the fields highlighted in yellow: **Last Name / Suffix, First / Middle Name, Birth Date, Sex, Phone Number.**
 5. Proceed with completing the appointment details and click **Save**. You will be notified via an information window of the new patient's chart number and be instructed to complete the full registration from the patient's chart at your earliest opportunity.
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