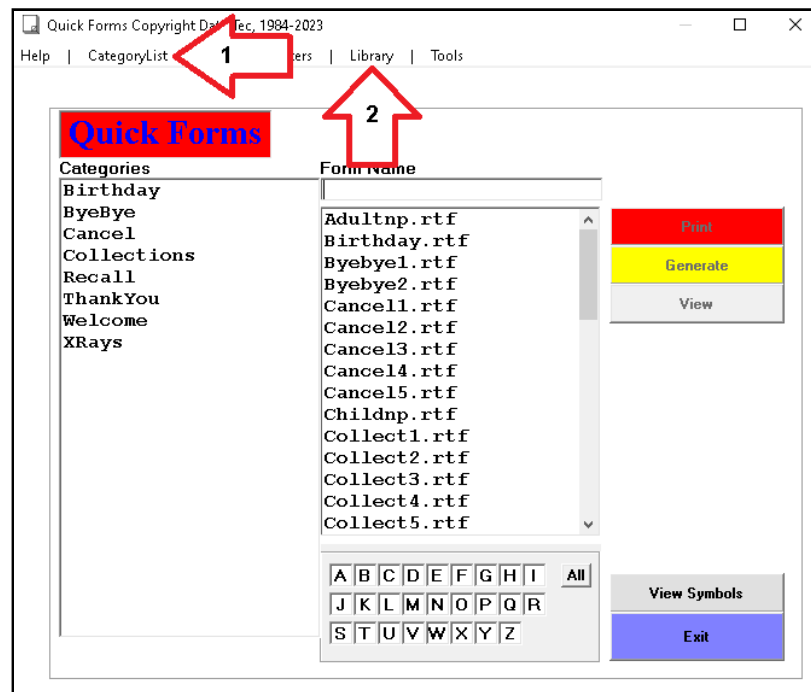


## Newsletter Tips

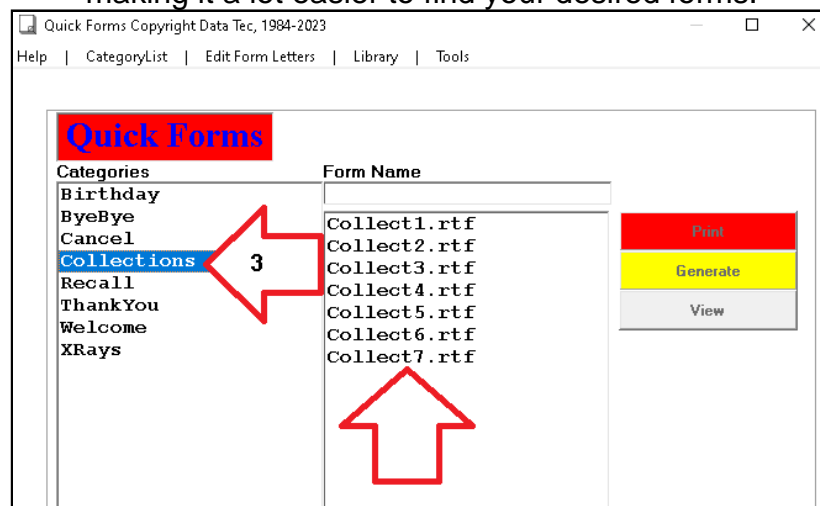
Feb. 2023

### “Quick Forms” Now Has Categories! To Get Started:

- 1) Set up categories of forms; use the Quick Form screens’ toolbar “CategoryList” option.
- 2) Add predefined Forms from a Library of over 40 Form Letters; use “Library” option.



- 3) When you click on a Category, only the form names in that category will be displayed, making it a lot easier to find your desired forms.



## Scheduling:

- When you schedule a patient that has the "MedAlert" field checked on their General Information screen, their name on the schedule will be followed by \*MedAlert\*. For example: **Smith Jane{1343}\*MedAlert\***

To activate this option, from the Schedule select the top toolbar "Utilities", then "Utility Options Menu", then "Set Scheduling Option". Check the option labeled "More Characters per Time Slot (\*\*MedAlert\*\*)". Please Note: this option will only affect future appointments.

- There is also a new Schedule Utility option you can use to scan your existing appointments and put **\*MedAlert\*** after the patient names that have a MedAlert on their General Screens. From the Schedule screen, select the top toolbar "Utilities" option, then "Utility Options Menu", then the top Toolbar "**Tools**" option, and finally select "Convert MedAlert Patient Names".
- If you are editing the Schedule Holiday list, you can now de-select July 4<sup>th</sup> if you wish.
- If you enter information for Medical Alert information on a patient's General Info screen, when you select their name slot on the schedule a red "**Med Alert**" will display. You can click on it to see what the Medical Alert info was entered for them.

## Patient Merge:

- There is a new "Merge" button on the "Utility Menu" to let you merge two patient's ledgers together and also copy their EDR folders.

## Insurance:

- If you use the "Utility Menu", "Global Changes" option "Change Insurance Carriers", when using this option, the "Old Insurance Carriers" will be inactivated.
- There is a new report to make it easier to find potential Duplicate Insurance Carriers. From the Reports Menu select Management Reports, then on the far-right hand corner select "Find Duplicate Insurance Carriers". There is another cool option on the report called "Combine Carriers"; this can be used to combine multiple carriers into one on the patient records. It also automatically inactivates the old carriers.
- The Insurance Carrier Payment Analysis report has improved. After displaying the report, you can click on a Carrier Line Entry to view and/or print a list of all patients currently using that carrier.
- A new report option is available on the "Claims Not Submitted" report. You can optionally specify up to 6 different carrier numbers to narrow down the report. You can run this report from the "Reports" Menu, then "Insurance Tracking", and then "Claims Not Submitted".

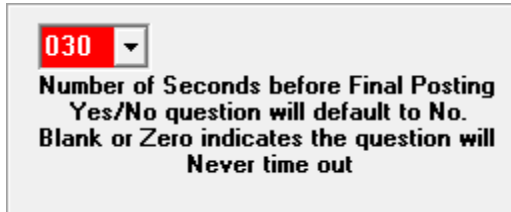
## Treatment Plan:

-On the patients **Treatment Plan** screen, there is a new option you can click in the upper right-hand side of the screen. In the “Estimated Insurance” box you can check “Apply Max Upon Print”. If this is checked and there is a Max/Year value, when you print a treatment plan automatically the Max/Year amount will be used. Not on the screen, but on the printed plans.

## Posting:

- On the Posting, the Provider/Hygienist Pop-Up list screen has increased from 10 to 20 entries.

- When you are posting and you get the final **Yes/No** posting question, major computer files are locked until you reply either Yes or No. A new option lets you set the maximum number of seconds the system will wait before defaulting to **No**, thus releasing the systems files. From the “Posting screen” select the top toolbar “Tools” option, then “Options Setups”, then set the value of the field show below. This can prevent someone from getting called away during posting and tying your system up.



## Perio Charting:

- The Perio General Legacy program has been improved to have a “Recession” button you can use to indicate Recession for each tooth.

## Documents:

- When using a patient’s documents folder, PDF type documents should display **faster**. When you open a PDF in the “**View**” mode, the program “Sumatra” will be used to display the document. This is a faster, low-overhead program. If you wish to open the document with your default Windows program, just select the “**Edit**” mode instead of “**View**”. If you don’t like “Sumatra” you can disable it by using the top toolbar “Tools” option, then select “Options Setup”, check “Don’t Use Sumatra to open PDF type files”.

## Miscellaneous:

-You can disable the Tablet Menu from being available. From the Primary Menu select the “Options” button, then click “Disable Tablet PC Type Menu”.

**Thank you for all your input and ideas; we hope this information is useful.**

Cordially,

A handwritten signature in black ink that reads 'Peter Goodall'.

[www.ezdent.com](http://www.ezdent.com)