



# “How to Enter Patient Info Faster and Easier”

Webinar will start at Noon CDT

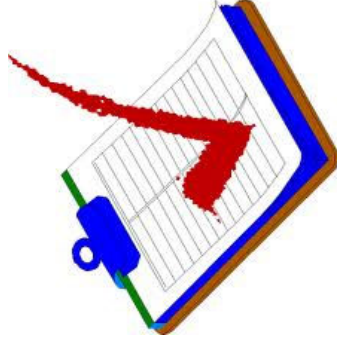
Please use Speakers, Headset, or call Webinar Phone  
Number

**\*\*Keep your Audio Muted during Webinar\*\***

**Dec. 5, 2012**

# Topics

- Update your EasyDent Software
- Primary Menu Shortcuts
- Employee Time Clock
- Posting Screen: **New** “One-Button Posting” for Final Insurance Payments
- Easily Print Patient & Ins. Carrier “Dymo-Type” Labels
- Scheduling: Options & Tips
- Document Folders & Merging Multiple PDF’s
- Laboratory - Printing Lab Slips & Tracking Lab Cases
- Message Center
- Cool, **New** “eMail Blast” Features
- “Question & Answer” Session



# Update EasyDent Software

- [www.ezdent.com](http://www.ezdent.com) link, on bottom-right of Primary Menu
- Select “Support” tab, then “Technical Notes” Link
- Click “[Internet Update Instructions](#)” link
- Call Data Tec for current Update Password

# Make sure You're Using the New Primary Menu and the New Schedule!

1. Make Sure Everyone is out of the schedule!
2. Go to the “options” in the lower-left of the Primary Menu and check the 2 green options:
  - **Recommended Schedule Without Browse Mode**
  - **Recommended Primary Menu**

See Next Slide for Details.....

# Primary Menu – “Options”

The screenshot shows the 'EasyDent User Option Settings' dialog box. A callout box with a black border and white background contains the text 'Click the Checkbox for Both Of These Options'. Red arrows point from this callout to two specific options: 'Recommended - Schedule without Browse Mode' and 'Recommended Primary Menu'. Other options are also highlighted with red circles or boxes, including 'Activate EDR "Electronic Charts"', 'Deactivate Automatic Signature Un File', 'Activate Patient Screen Timeout', and 'Recommended Primary Menu'. The dialog is divided into 'Global Settings - All Computers' and 'Local Settings - Work Station Only' sections. At the bottom, there are buttons for 'Save', 'Create Network Main Computer Drive Startup File', 'Defaults', 'Cancel', and 'Save/Exit'.

**Global Settings - All Computers**

- Active Usage of Sound Card
- Deactivate Menu Name Prompts
- Make Alternate Account Number Visible on General Screen
- Make Location Code Visible
- Use Expanded Transaction File
- Auto Start NetCom During Login
- Activate EDR "Electronic Charts"**
- Deactivate Automatic Tip of the Day
- Deactivate Automatic Reminder Screen
- Deactivate Gen Screen 10 Minute Time Out
- Eliminate Telephone Number from Patient Criteria Report
- Deactivate Automatic Signature Un File
- Recommended - Schedule without Browse Mode**

**Local Settings - Work Station Only**

- De-Activate Screen Print Auto Start
- De-Activate Auto Help Screens

**Auto Cross Network Backup**

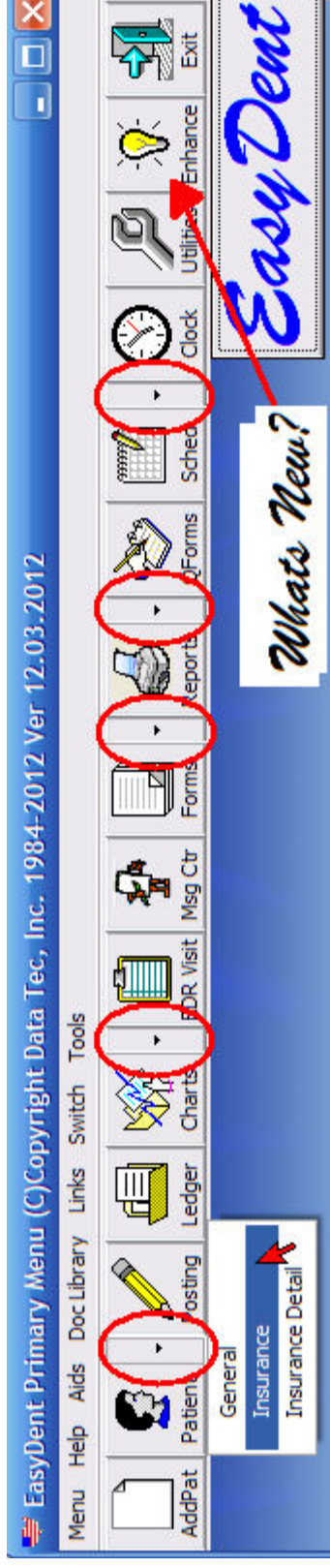
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Never

**Schedule Screen Size**

- Check to AutoSize Your Screen
- Screen Size Factor: -200
- Font Size Factor: 250
- Schedule # to open first: 01
- Schedule CMD Top: Height of Time Slots

**Buttons:** Save, Create Network Main Computer Drive Startup File, Defaults, Cancel, Save/Exit

# Primary Menu: Shortcuts



## Use Drop-Down Arrows to Save Time....

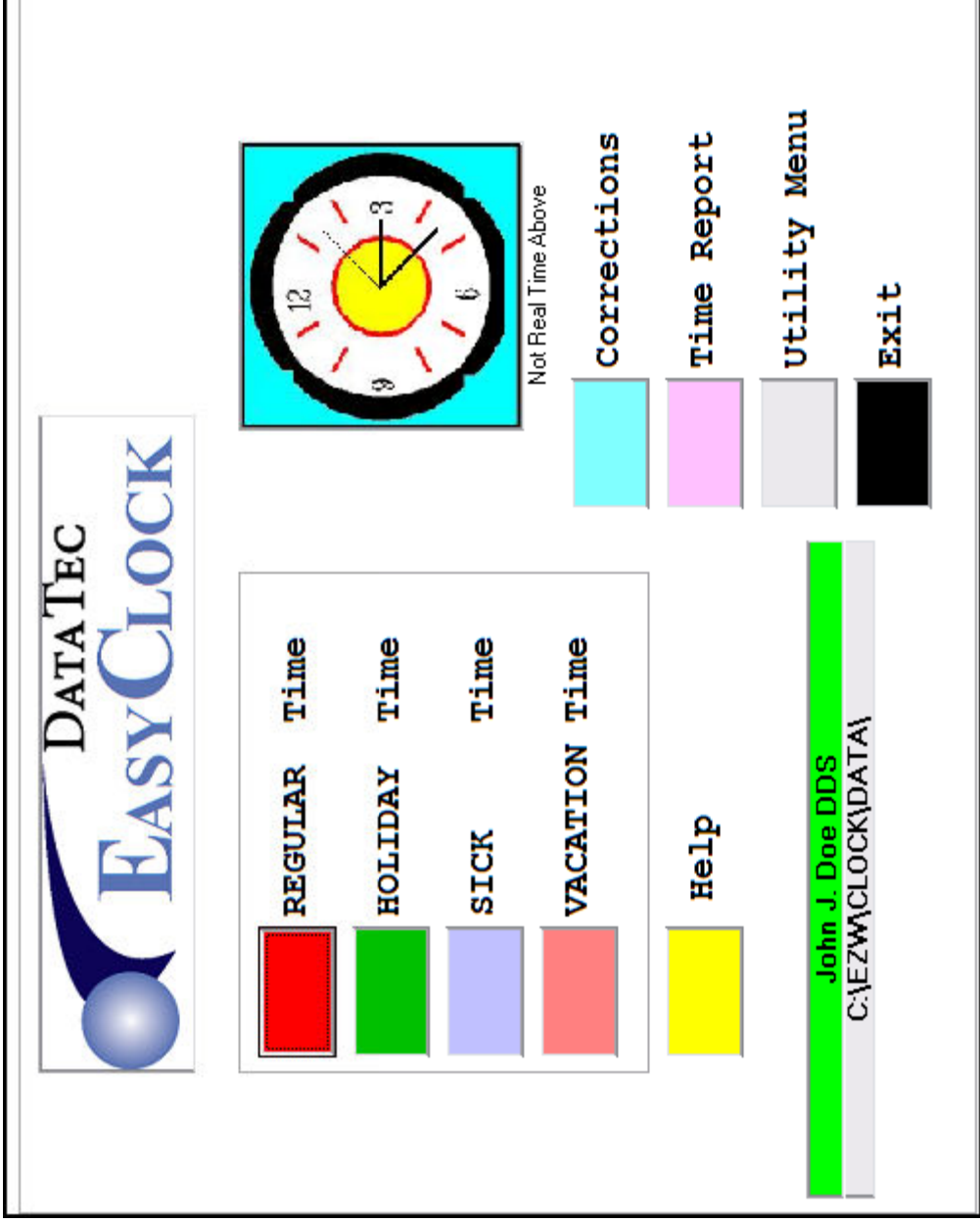
- Go directly to a Patient's Insurance Screen
- Go directly to a Specific Report
- Go directly to printing labels, statements, recall, etc.
- ...and much more!

**\*\*Click the "Light Bulb" Icon to check the latest enhancements on the Internet\*\***

[Primary Menu](#)

# Employee Time Clock

Never have to add up hours again!



[Primary Menu](#)

# Posting Screen: New & Cool

## Buttons

The screenshot shows a dental posting interface with several callout boxes and red arrows pointing to specific buttons:

- Mini-Ledger**: Points to the "Mini" button in the top navigation bar.
- ADA Groups**: Points to the "ADA Groups" button in the top navigation bar.
- "Insurance's Final Payment" button**: Points to the "Ins Final Pay" button in the top navigation bar.

The interface includes a table with columns: ADA Code, Tooth Surfaces, Dent Hyg Qty, Description, Charge Amount, Hyg #, Adjustment \$, Date of Service, Ins Final Pay, ADA Codes, Adj, InsPro, EstVw, and Post. The "ADA Codes" button is highlighted in blue. The "Ins Final Pay" button is highlighted in green. The "ADA Groups" button is highlighted in green. The "Ins Final Pay" button is also circled in red. The "Mini" button is also circled in red. The "Treatment Plan" button is highlighted in green. The "Next" button is highlighted in green. The "Post" button is highlighted in red. The "Family Bal: 1407.50" is displayed in a yellow box. The "Balance 961.50" is displayed in a green box. The "Posting Date 09/25/2010" is displayed in a grey box. The "BEST PATIENT EVER" text is displayed in a grey box. The "Pre Post" text is displayed in a red box.



# Posting Screen

- Mini-Ledger – opens a small ledger window so you can still stay on the posting screen
- ADA Groups – sets up a batch of common-used ADA codes
- “Ins Final Pay” button – figures out what the Final Insurance Paid Amount should be and allows posting with One Button!

# Dymo Label Printer

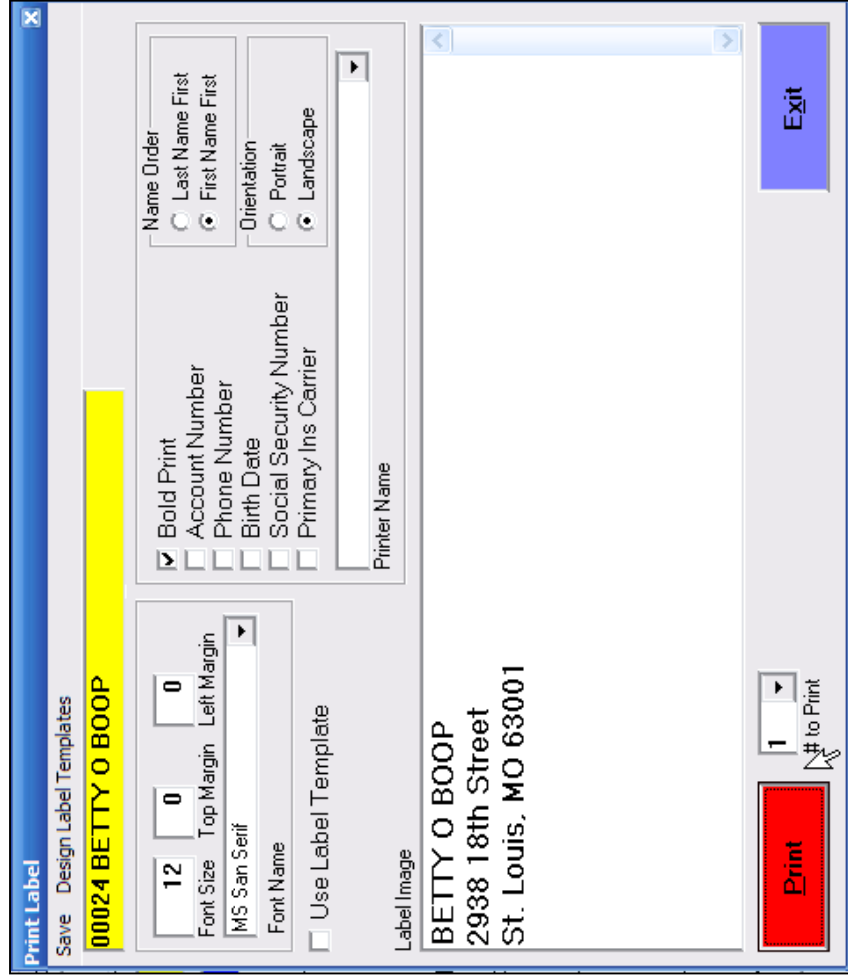
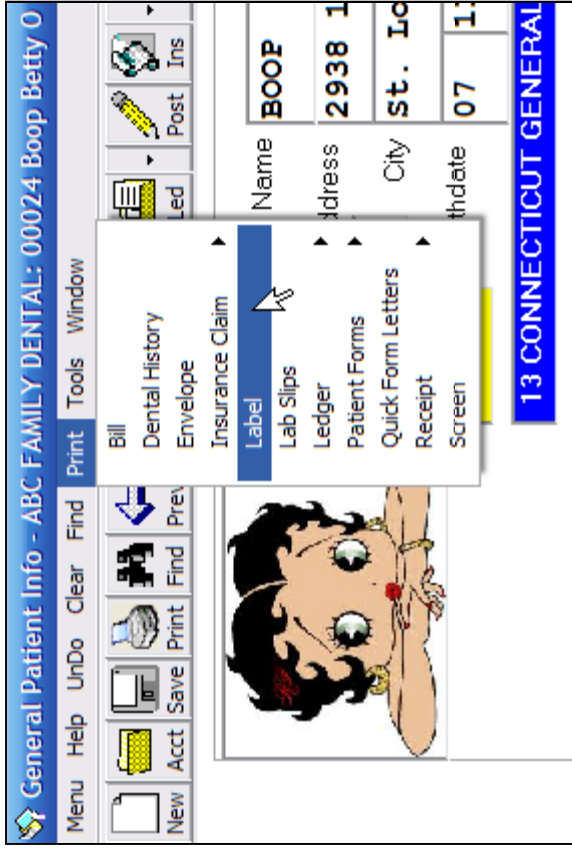


## Features:

- Prints Patient Addresses
- Print Insurance Carrier Labels or any other kind of label
- Smaller than a Breadbox
- Prints *Very Fast*
- It uses no ink whatsoever!

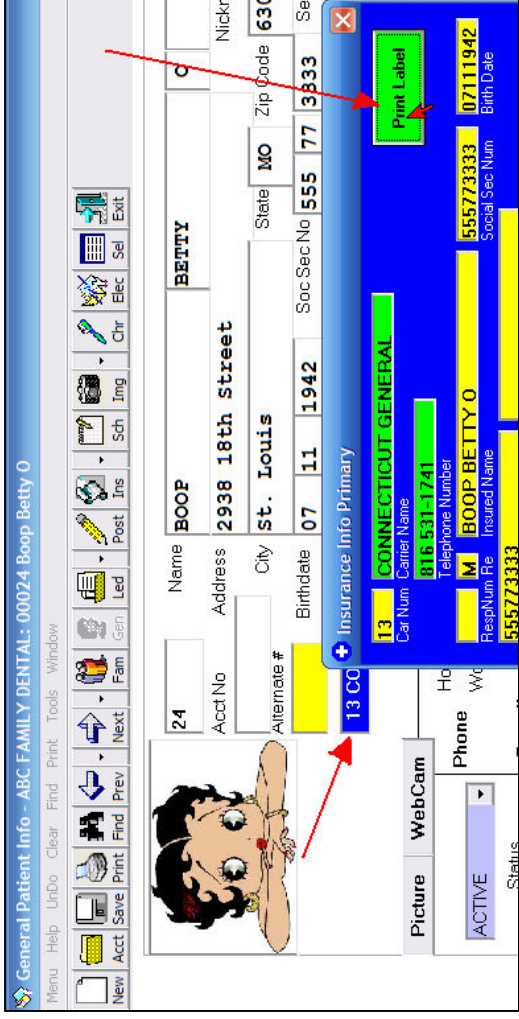
With one of these, you can.....

# Dymo Patient Labels

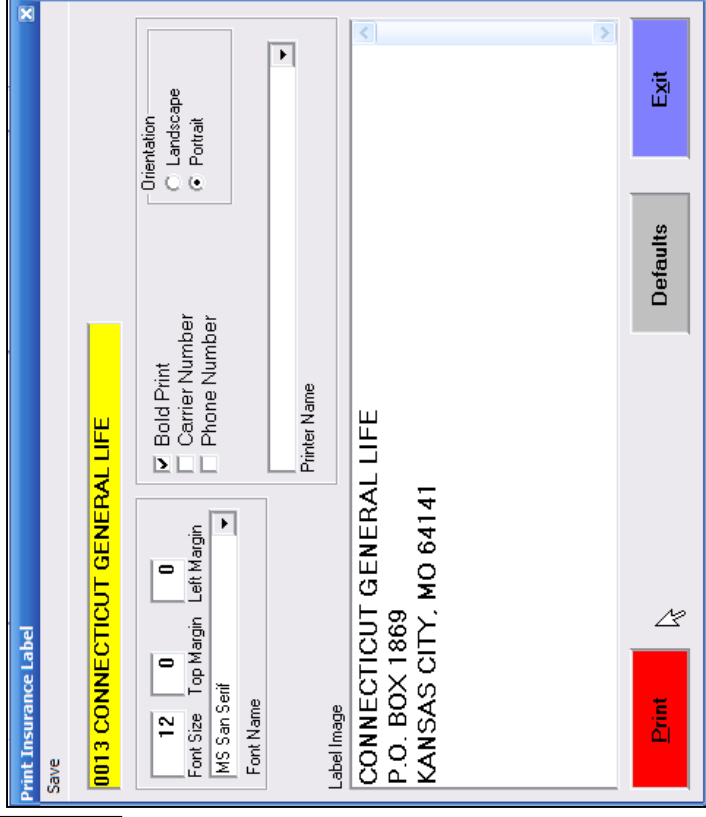


[Primary Menu](#)

# Print Dymo Labels for Ins. Carriers



**How To Do It: On the patient's general screen, click the carrier's name in blue, then click the green "Print Label" button**



Primary Menu

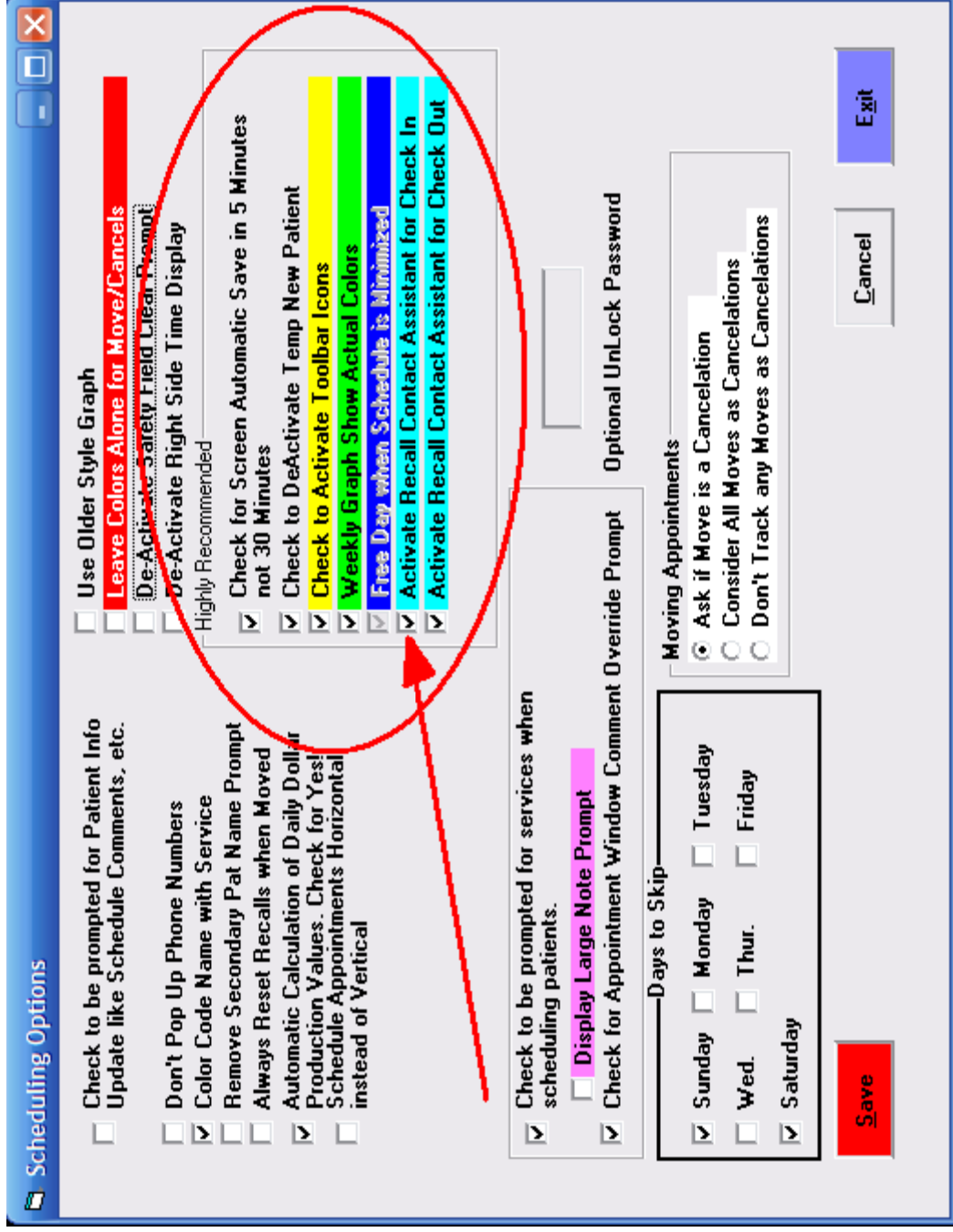
# Make sure you have the *New No-Browse Mode Schedule*

enabled for the following features.....

- From the Primary Menu select the “Options” button in the lower left-hand side
- Check the **Green** Option called: **Recommended – Schedule without browse mode**

It’s that Easy 😊

# Important Scheduling Options



# Schedule Patient Window

:45		
9:00AM	JUNG CG {145}	
	CG H JUNG	Male X
	DOB 05231969 by HAL	43
	Home 314 543-1234	7
	Work 314 123-4567	
10:	Cell -	
		Notes
		Confirm
		Check In
		Check Out
		Assistant
		Appts
		Bill History
		ID Cards
		Mini Ledger
		Pat-Update
		Photo
		Print
		X-Rays
	Cancel Copy Move Human Error Red Flag	
11:		
	:30	

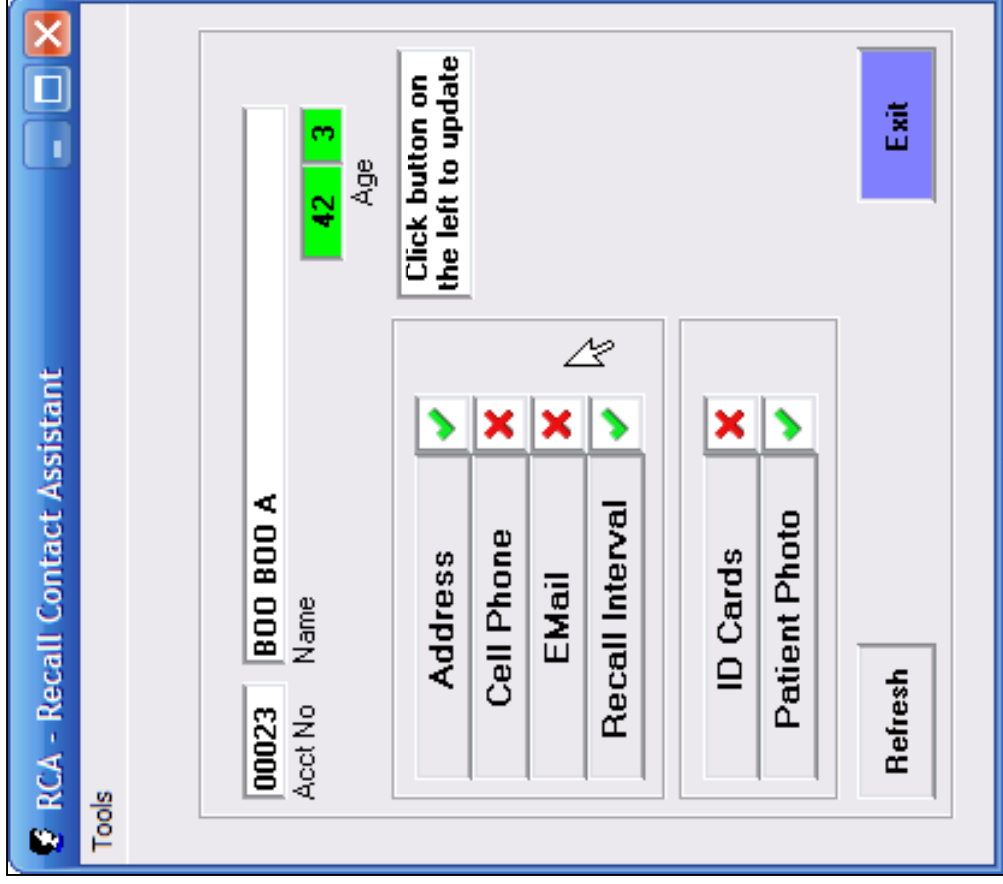
Primary Menu

# **In the Schedule: Copying Patient's Appointment for a Recall**

- You must set the Recall Service Codes using the Schedule Utility to have a “Y” in the Recall Column
- Copying the appointment now updates their recall on the patient's general screen
- Copying updates the patient's “Appt List” with the new day & time



# Recall Contact Assisnant



# Scheduling: Adding New Patients

Time	DR. DOE	DR. DOE	DR. DOE	CHRISTINE	SALLY
8:00AM					
:15					
:30					
:45					
9:00AM					
:15	ADAMS JOHN {2}				
:30	[1] ADULT RECARE				
:45					
10:00AM					
:15	BRADSHAW TERRY {25}				
:30	[9] AMALGAM				
:45					
11:00AM					
:15	BURNS GEORGE {35}				
:30	[9] AMALGAM				
:45					
12:00					
:15					
:30					
:45					
1:00PM					
:15					
:30					
:45					
2:00PM					
:15					
:30					
:45					

[Primary Menu](#)

# Scheduling: Adding New Patients, pt. 2

**Patient Name Search**

FIFE  
 Last Name, Acct#, or SSN  
 Patient Name

Social Sec Num   
  Acct Num   
  Age   
  Birth Date

Active   
  All   
  InAct   
  NotPat   
  Super Size   
  Auto Search

Today/Future Appts   
  Cancellations

Patient Name	Social Sec Num	Acct Num	Age	Birth Date
<b>FILLMORE MILLARD R</b>	<b>444-33-5555</b>	<b>89</b>	<b>43</b>	<b>05231969</b>
FISHER CARRIE M	333-88-8444	90	30	11181982
FLINSTONE PEBBLES M	444-11-2222	91	36	03231976
FLINSTONE DINO L	333-33-2222	92	57	06181955
FLINSTONE FRED I	222-23-2222	93	63	11121949
FLINSTONE PEBBLES J	111-33-2222	94	43	01221969
FLINSTONE WILMA G	999-77-3333	95	42	09131970
FORD GERALD A	555-77-3333	96	70	07111942
FORD HARRISON F	444-33-5555	97	43	05231969
FOX MICHAEL J. Z	333-88-8444	98	30	11181982

[Primary Menu](#)

# Scheduling: “Add New Patient”

## Screen Benefits

- You can add as much, or as little, of the new patient info as you want
- You can add the rest of the info when the patient arrives
- You can even run a report to find out what new patients didn’t show
- You can even use Pop-up buttons

# Documents Folder

## “Merge PDFs” and “View 10 PDFs” at button

- You can merge 2 scanned-in documents into a single document, such as labs, scanned-in x-rays, etc.
- You can also view several scanned documents at a single time
- Be sure and install the **FREE Foxit PDF** reader, and use Tabbed Mode

# Lab Tracking

1. Easily Enter Lab cases for a patient & optionally print lab slips
2. When Labs come in simply use the Primary Menu option “LabCheck” to quickly check the Labs in, and/or check on outstanding labs.
3. Use the “Laboratory Tracking” report from the Reports Menu.

# Patient Lab Track Window

General Patient Info - ABC FAMILY DENTAL: 00093 Flintstone Fred I

Menu Help Undo Clear Find Print Tools Window

New Acct Save Print Find Prev Next

Post Ins Sch Chr Elec Sel Exit

Fam Gen Led

93 Name **FLINTSTONE** **FRED**

Acct No Address **3628 Curve Road**

Alternate # City **Columbia** State **MO**

Laboratory Tracking Acct# 00093 FLINTSTONE FRED I

Tools Help Undo Clear

00093  
Acct No

Lab Number	Date Sent Out	Date Promised	Date Returned	Try In Date	Date Finished	Amount \$
3	BETTER TEETH, INC.	11302012	12072012			
1	ABC LAB, INC	12062011	12092011	12202011	12282011	875.00

Store Copy of Printed Lab Form in EDR Documents Folder

Save

Add New Entry Line

Print Lab Slip

Update Lab File

Cancel













Save/Exit

[Primary Menu](#)

# Lab Work Check-In

EasyDent Quick Lab Work Check-In

Lab Check In

Click Button	Lab #	Patient Name	Acct #	Date Sent Out	Date Promised	Date Received
	003	ADAMS JOHN	00002	05032005	05162005	
	001	CHARLES RAY	00047	04252002	05022002	
	003	FLINTSTONE FRED	00093	11302012	12072012	
	001	JOHNSON ANDREW	00141	11262012	12062012	
	003	KELLER HELEN	00148	12032012	12102012	
						
						
						
						
						
						
						

Save   Scroll Down   Scroll Up   View All Non Finished Cases   Print   Undo   Cancel   Help   Save Exit



# Message Center



- Quickly record telephone messages using pop-ups & shorthand
- Assign Messages to Specific Staff
- Quickly see all messages waiting
- Document result of the phone calls
- Store entire Message on Patient's Chart

# Message Center

EasyDent Message Center User:Halg

Add New Help Clear Delete EDR Move Print Refresh Save Spell Store Tools Undo Exit

Current User ID: Halg

Patient Name: BALL LUCILLE W

Acct Num: 17

D.O.B.: 05-23-1969

Age: 43

Home Phone: 314 543-1234

Work Phone: 314 123-4567

Cell Phone:

Created: 12/03/2012 23:57

Updated: 12/03/2012 23:58

Check if Urgent:

Message Selection List

Message ID	Patient Name	Message Text
20121203235752	BALL LUCILLE	Patient want script refill
20121203235716	AUSTEN JANE	

In Boxes

User	Crystal	Peter	Robert	Susan	John	Karen	Larry	Michelle
	0	0	0	1	0	0	0	1

Date Time Stamp Short Hand Msgs Actions

[Primary Menu](#)

# “eMail Blaster” Feature

You can now prepare a custom list of patients by your criteria and send an email blast out to those patients. (Newsletters, Announcements, Marketing)

1. Start by going to the [Reports Menu](#) & Generating a Report with the Patients you Want
2. Then, use the Forms Menu → “eMail Blaster option”

Patient Name	Email Address
<input checked="" type="checkbox"/> HANK S AARON	hankaaron@anytownusa.net
<input checked="" type="checkbox"/> JOHN N ADAMS	johnadams@yahoo13.bit
<input checked="" type="checkbox"/> JOHN QUINCY O ADAMS	johnquincyadams@yahoo13.bit
<input checked="" type="checkbox"/> WEIRD G AL YANKOVICK	weirdalyankovick@msn3.net
<input checked="" type="checkbox"/> SUSAN B. T ANTHONY	susanbathony@anytownusa.net
<input checked="" type="checkbox"/> CHESTER S ARTHUR	chesterarthur@anytownusa.net
<input checked="" type="checkbox"/> FRED K ASTAIRE	fredastaire@disneyland7.com
<input checked="" type="checkbox"/> DAN U AYKROYD	danaykroyd@anytownusa.net
<input checked="" type="checkbox"/> F LEE J BAILEY	fleebailey@gmail15.gov
<input checked="" type="checkbox"/> YOGI N BEAR	yogibear@yahoo13.bit
<input checked="" type="checkbox"/> JACK I BENNY	jackbenny@gmail15.gov
<input checked="" type="checkbox"/> TWEETY T BIRD	tweetybird@anytownusa.net
<input checked="" type="checkbox"/> BETTY O BOOP	bettyboop@yahoo13.bit

# Q & A Session

Please use your Message Window to type in a question and we will repeat it so everyone can hear it, and then try to answer it.

Thank you 😊

# The End

