EasyDent Training Topics

Session 1 (1 ½ to 2 Hours)

1. Computer Basics

__ a. Monitor, System Unit, Keyboard, & Printer
__ b. Compare the Keyboard to that of a typewriter.
__ c. Cover Windows Start Up and Shut Down.
__ d. Cover Work Stations Start up and Shut Down Sequence.

__2. Talk about turning Power Off

__3. Start Up EasyDent and cover Sign In User ID and Password.
Single Click and ENTER is OK

__4. Use Advanced Utilities and Set Up User Names.

__5. Describe Primary Menu Options and Aids.

__6. Cover Sample Files Activation and Real Files.

__7. Discuss how to Exit *EasyDent*, X and Logout.

8. Select Adding New patients.

__ a. Discuss how you don't need to capitalize!
__ b. Cover Setup of Defaults.
__ c. Use Zip Code List.
__ d. User Referral Option Button.
__ e. Click on and Changing all or part of a data field.
__ f. Insurance “Find” by part of address; like P.O. Box Number, etc.

9. General Information Screen.

__ a. Discuss the three Screen layout.
__ b. Show how to use the cursor movement and editing keys.
__Right Tab __ Left Tab __ Enter Mouse
__ c. Help Command Button.
__ d. Discuss all Data Fields
__ Add name and address information
__ Explain how to enter RESP ACCT number for dependents.
__ e. Explain the uses of all the Buttons, making sure that
they know Pressing SAVE Icon is not required.
__ f. Discuss UNDO top menu toolbar option again.
g. Show how to find patients by:
__ Account Number __ Name List __ Any other General Field
__ h. Use Icons to change to other patient screens, and the menu.

10. Introduction to Posting.

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Session 2 (1 ½ to 2 Hours)

1. Review, including EasyDent Back Up.

2. POSTING

__ a. Discuss split screen, all Data Fields
__ Use Help options.
b. Show how to Post Charges
__ ADA Code Double Click __ Shorthand Code
__ ADA Codes List
__ c. Show how to Post Payments
__ d. Show how to Post Adjustments
__ e. Select to print a RECEIPT.
__ d. Note Data Fields updated by Posting and Receipt options:
__General Information Screen

4. Go to the LEDGER SCREEN.

__ a. Data areas, and Scrolling.
__ b. Deleting an entry
__ c. Making Corrections

__5. Select Option C from Primary Menu, and change an existing patient's name.

__6. Print a Receipt

__7. Daily Reports
__ Audit __ Day Sheet __ Bank Deposit __ Schedule Cross Reference

8. Insurance

__ a. Paper Claims
__ b. Electronic Claims
__ c. Claims Not Submitted
__ d. Overdue Claims Tracking
__ e. Estimates, Pre-determinations
__ f. Resubmitting Claims

EasyDent Training Topics

Session 3 (1 to 1 ½ Hours)

1. Employee Time Clock

__ a. Defining Employees
__ b. Timing In and Out
__ c. Corrections
__ d. Time Reports

2. Scheduling

__ a. Moving up and down through the Schedule
__ b. Changing Dates in the Schedule
    __ Next, Prev __ Calendar __ Graph
__ c. Scheduling Existing Patients finding patient first
__ d. Scheduling Existing patients finding the Time Slot first
__ e. Moving Appointments
__ f. Canceling Appointments
__ g. Brand New Patients, Temporary file
__ h. Print outs and Reports
i. Customizing the Schedule
    __ Day & Column Names
    __ Schedule Service Codes
    __ Setting Scheduling Options
j. Blocking Time
    __ By Characters /.*\=
    __ By Color
    __ By Services
    __ By Model Days

EasyDent Training Topics

Session 4, plus (1 to 1 ½ Hours)

__ 1. Finance Charges

__ 2. Printing Statements

__ 3. Recall, reports, bumping dates, and printing cards.

__ 4. Practice Analysis report review.

__ 5. Patient Charting.