

Archiving Patients

Periodically you might want to archive patient information for patients you haven't seen in a long time; thus reducing the number of patient records when you search for patients and freeing up space for more new patients.

As an example: all patients, you haven't seen in 5 years that have a zero balance, etc. Archived records are stored in a separate folder on your Main computer. The folder name is **\EZWARCHIVE**, make sure you back up the entire **\EZW** folder and all sub-folders during your normal backup procedures.

Steps:

1) Determine the exact criteria you want to use. Use the **Reports Menu, Patient Search by Criteria** report. Try different sets of criteria and run the report then look at the last page of the report to see how many patients would match these criteria. Try different date ranges to help determine exactly what meets your needs best.

We recommend starting by trying the following options:

- (1)** 01011980 **(2)** Set date to the date since you have last seen the patients
- (3)** Balance Range -.01 to .01 Thus they don't have a balance **(4)** Not in a Family
- (5)** Numeric Order **(6)** "All" for Patient Status **(7)** Check for Totals Only

The screenshot shows the 'Patient Search by Criteria Report and/or Merge' form. Red callouts 1 through 7 point to the following elements:

- 1:** The 'Dentist No' field, which is set to '00'.
- 2:** The 'Last Visit Date' field, which is set to '01011980'.
- 3:** The 'Balance Range' field, which is set to '-.01' through '.01'.
- 4:** The 'Not In a Family' checkbox, which is checked (marked with an 'X').
- 5:** The 'Numeric Order?' checkbox, which is checked.
- 6:** The 'Patient Status - General Screen' section, where the 'All' radio button is selected.
- 7:** The 'Check for Totals Only' checkbox, which is checked.

Other visible fields include: Social Sec Num, BirthDate, First Visit Date, Next Recall Date, Last Recall Date, Appointment Dates, Last Bill Date, Last Posting Date, Last FMS Date, Type of Patient, Birthdate Month, Birthdate Day Range, User Flags (1-5), Payment Profile #, Either Carrier #, Prime #, Sec #, Emp #, Next Rec Month, Year Range, Last Rec Month, Year Range, Collection Flag is Checked, Insurance Pending Flag, No Bill Flag, Finance Charge Flag On, Cash Only Flag On, Responsible Accounts Only, Dependent Accounts Only, Primary Insurance Carrier, Patient Has Insurance, No Ledger, No Future Appointment Scheduled, Has Any Secondary Insurance, First Visit and Last are the Same Date, Pre-Med Non-Blank, Pregnant, Dependent Active/Resp Not Active, Zip Code or Part of Zip Code, Referring Dentist # or NONE, Fee Type - Fee Schedule Number. At the bottom, there are buttons for 'Run', 'Help', and 'Exit', and a 'Print Out' section with 'Font Size' set to 8 and 'Lines Per Page' set to 80.

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2) Back Up your EasyDent system completely. In addition, to your regular backups, we recommend you make a backup set that you aren't going to reuse. In other words, back up to a USB Hard Drive and set it aside and never reuse it. This way you have a level set back up that has an image of all your data before your archival is started.

If you are using a Network it's also a good idea to do 1 or 2 cross network backups using the EasyDent **Primary Menu, Back Up** option, **Non-Encrypted Backup**, and then the **“Cross Network Back Up”**.

3) Set aside time to run the Archive job. It could take **several hours**, you probably need to let it run overnight.

4) Run the process at the **Main computer** (if possible), and that **no one else will access EasyDent during the Archive process.**

5) Run the Reports Menu, Patient Search by Criteria report; use the criteria you figured out from step 1 above. Also, be sure and mark these additional special check boxes:

Generate Acct No Work File

Numeric Order

Set Patient Status General Screen to "All"

6) Return to the Primary Menu and select the Archives option in Lookups and Aids.

7) Select the Archive EasyDent Patient Ledgers, follow the on screen prompts.

8) Back Up your Archive Folder to an external USB Hard Drive. Your EasyDent Back Up may not back your Archived record folder. Archived records are stored in a separate folder on your Main computer. The folder name is **\EZWAREARCHIVE**, this folder may not be backed up when you back up EasyDent. After you begin archiving Patient records you will need to back up this folder separately. Just copy the entire **\EZWAREARCHIVE** folder along with all its sub folders to your back up media. Ask your technical support hardware person to help you with this task.