

Insurance Claims

1. To print an individual claim, retrieve patient record, click on the Top menu Print option, select Insurance then select "Newest Style".
2. Make sure dates of service are correct.
3. Select "Type" of claim, P- Primary, S-Secondary, E- Estimate.
4. Press Print Form button.

1. To print batch of insurance claims, us the forms menu "Insurance Forms" option.

1. To submit electronic claims, us the forms menu "Electronic Claims" options.

1. Use the Reports Menu, Insurance Tracking option to print, Claims not submitted and Overdue claims reports.

Patient Bills

1. From a patient screen you can select Top menu option Print then Bill, this will print an individual statement for one patient.
2. To print a batch bills use Forms Menu, Billing, Family Multiple Statements.
3. You can even send the patient statements electronically!

Reports

1. Print reports from the Reports Menu.
2. Reports are organized by categories.
3. You can print reports any time you want. i.e. print monthly reports every day if you wish.

EasyDent

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Adding Patients

1. From Scheduling select the Binoculars Icon, then “New Patient Real” from Scheduling.
2. Information can be in lower case, automatically changed.
3. Use Default button to set up default state, etc.
4. Use Zip Codes button to set up common zip codes.
5. Click on City field to select from Zip Code list, or down arrow on Zip Code field.
6. Click Pat Refer or Dentist Refer button to indicate the referral source.
7. Double Click on Carrier # field to select carrier.
8. If Relationship is “M” for myself, use Fill In button to copy info from top of screen.
9. When ready click Save Icon button to create new record.

Updating Info

1. Retrieve patient by name, part of name, or account number.
2. Change information on screen, press Save Icon. If you don't press Save, but switch screens, info is changed automatically.
3. To change a patients name from the General Screen, use “Tools” then “Change Name”.

Posting Visits

1. Use the Post Icon.
2. Retrieve the Patient by name or number.
3. Fill in ADA Codes, Dates of Service, Payment amount and type of payment, and any Adjustment amount and type of adjustment. Click or Double click on fields to look up codes.
4. Press the Pre-Post button to

fill in all the fields and check for errors.

5. Override any amounts you wish to change.
6. Press the Post button to actually update the account.
7. Select the Print option on the Top menu if you wish to print a receipt, etc.

Posting Payments

1. Use the Post Ledger Screen.
2. Retrieve Patient.
3. Enter in amount of payment, type of payment, and Date of Service.
4. Fill in any check numbers for personal checks, or adjustment code for any adjustments.
5. Press the Pre-Post Button.
6. Press the Post Button.