

# EasyDent Enhancements 2018

---

## 11/23/2018

**0059** Audit Logging of Transaction Ledger changes or modifications have improved. You can run the new audit log report from the Reports Menu, then Management Reports, and then select “*Ledger Change Audit Report*”.

## 11/19/2018

**0058** Schedule production calculations have been improved.

- You can specify a number of times a service is going to be done. For Example; when you select a service for Sealants you would indicate it's for 6 teeth. On the schedule line it could look like [20x6] Sealants
- You can easily specify a specific dollar amount of services for example: [\$400] Restoration. Manually entering the [\$400] to indicate 400 dollars.

## 11/16/2018

**0057** On the *Insurance Estimated Pay Details* screens there is a new column where you can set the “*Insurance Maximum Amount*” that will be considered when estimating Insurance payments. You can still post a higher amount such as your normal “Fee for Service”, but if this column is filled in the maximum considered for the estimated percentage calculation will be the “*Insurance Maximum Amount*”.

**0056** There is a new option you can set on Employer definitions; “*Never Send SOF*”. If you select this option then signature on file will not be sent with insurance on anyone connected to the employer. This overrides all other options; including what you have set on the Insurance Carrier definition.

**0055** There is a new option you can set on Insurance Carrier definitions; “*Send SOF based on Patient Ins Detail Screen*”. If you set this to “YES” then SOF will be based on the SOF file on the patient's insurance detailed screen.

## 11/13/2018

**0054** The Employee Time Clock has a new option you can set to allow Employees to run the Time Report and only see their own time records based on their Time In Pin Number. Please call Data Tec to help you activate this option. You can also define a Report Password that would allow anyone entering the Report Password to view all the employee time records.

## 11/12/2018

**0053** On the Posting screen when you use the “*Ins Final Pay*” button and you have already filled in some type of insurance payment (other than partial payment), your payment type will be left unchanged.

## 11/10/2018

**0052** There is a new feature you can use to display and/or print ADA codes you have never used. From the Utility Menu select “*Fee Schedules (ADA)*”, then select the top toolbar option “*Print*”, and then select “*List of Never Used ADA Codes*”.

# EasyDent Enhancements 2018

11/09/2018

**0051** You can now insert divider lines within treatment plans. First, define a Fake ADA Code that has all hyphens as the Tooth Number, Tooth Surfaces, and Description. Make sure you set the amount value to zero and the Insurance Print column to "None", as show below:

EasyDent Fee Schedule - Update/List

CDT Update Video | Print | Tools

Fee Schedule 0 Name Base Fees

ADA Code	Short Hand	Dollar Amount	Procedure Description	Tooth No/Surface	Insur Print	New Pat.	CPT Code Recall HCFA	In Act	Note	Taxable
000001		0.00	-----	--	NONE					<input type="checkbox"/>
000120		35.00	Periodic Oral Evaluation	NA NA	00120		X			<input type="checkbox"/>
000140		35.00	Limited Oral Evaluation	NA NA	00140		X			<input type="checkbox"/>

Second, in the Treatment use the Fake ADA Code to create the line dividers, as show below:

Treatment Plan

Menu Help Undo Find Print Tools Window | Templates | Re-Arrange Lines

Acct No: 00002 Last Name: FLINTSTONE First: FRED MI: N Age: 47

547 AETNA  
4 AETNA LIFE CASUALTY

Ins Profile  
Deduct/Year: 200  
Max/Year: 2500

ADA #	Tooth	Surface	Time	Charge	Prime Ins	Sec Ins	Pat Amt	Date	Status	Description
1	000150	NA	NA	45.00	45.00	0.00	0.00	11092018	P	Comprehensive Oral Eval.
2	001110	NA	NA	52.00	52.00	0.00	0.00	11092018	P	Adult Prophylaxis
3	000274	NA	NA	50.00	50.00	0.00	0.00	11092018	P	B.w. X-rays
4	000001	--	--	0.00	0.00	0.00	0.00	11092018	P	-----
5	002160	MOD		101.00	80.80	0.00	20.20	11092018	P	Amalgam 3 Surfaces
6	000001	--	--	0.00	0.00	0.00	0.00	11092018	P	-----
7	003331	19	NA	0.00	0.00	0.00	0.00	11092018	P	Treat Root Canal Obstruc
8										

Treatment plan enhancement is continued on the next page.

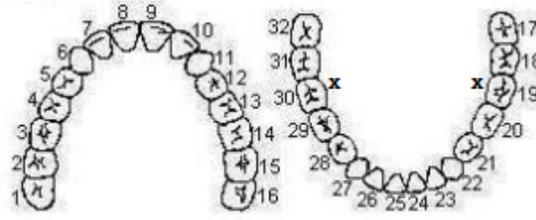
# EasyDent Enhancements 2018

Third, when you print the treatment plan, the divider lines will be shown:

**TREATMENT PLAN - FLINTSTONE, FRED N**  
Date: 11-09-2018 Acct# 00002



**JOHN SMITH, DDS**  
and Associates  
Telephone (555) 111-2222



ADA Code	Tooth	Surf	Time	Date	St	Description	Amount	Pri	Ins	Sec	Ins	Pat	Pay
00150	NA	NA		11092018	P	Comprehensive Oral Ev	45.00		45.00				0.00
01110	NA	NA		11092018	P	Adult Prophylaxis	52.00		52.00				0.00
00274	NA	NA		11092018	P	4 B.w. X-rays	50.00		50.00				0.00
02160	30	MOD		11092018	P	Amalgam 3 Surfaces	101.00		80.80			20.20	
03331	19	NA		11092018	P	Treat Root Canal Obst	0.00					0.00	
<b>Totals</b>							<b>248.00</b>		<b>227.80</b>			<b>20.20</b>	

## 11/02/2018

**0050** When overriding time using the Employee Time Clock the override screen has been made easier to use. If for any reason you don't like the new format, please call Data Tec and we can show you how to change an option to use the old format.

## 10/30/2018

**0049** The Monthly Report "**Accts Receivable Posted by Dentist**" has been enhanced with buttons to let you **view/print detailed lists** of patients with Credit and/or Positive balances. You can also click on the detailed list by patient and display the patient's ledger.

## 10/25/2018

**0048** There is a new schedule report which lets you get a list of future appointments by any set of service codes. From **Scheduling** select the top toolbar "**Print**" option then "**Find Appts by Service**".

## 10/19/2018

**0047** The Schedule Telephone List has a new **Format #13** that is like format #6 with the addition of the patient's age and account balance.

**0046** You can now launch the Ortho Picture Layout screen from the schedule by clicking on the patient's name entry, than select "**AddOptions**" then "**Ortho Pic Layout**".

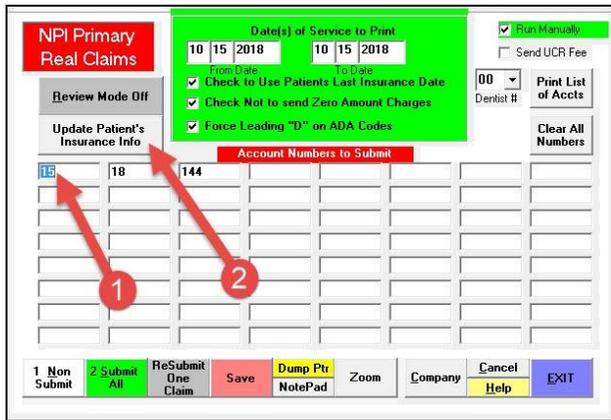
# EasyDent Enhancements 2018

10/16/2018

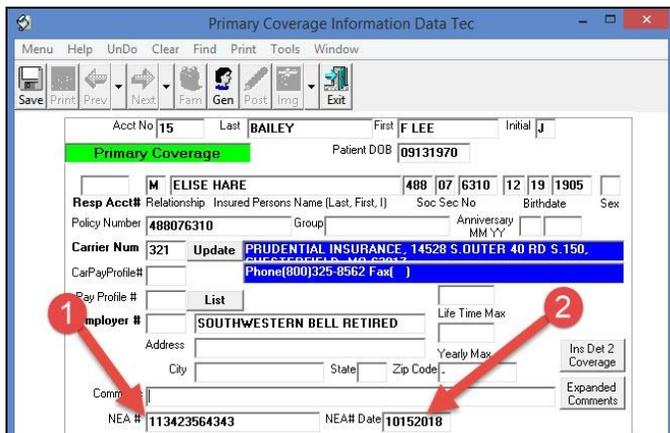
**0045** The new **2019 CDT Codes** are available. We recommend you don't update your codes until near the end of 2018. After you install the latest EasyDent Internet updates, you can learn how to update your CDT codes easily by going to [www.ezdent.com](http://www.ezdent.com) selecting the "Support Tab", then selecting the "Technical Notes" button, and technical note #37 "CDT ADA Code Updates".

10/15/2018

**0044** You can update the patient's insurance screen information while being on the **NPI Electronic Primary Claims** submission screen. First, click on the Account Number you wish to edit, then click the new "Update Patient's Insurance Info" button.



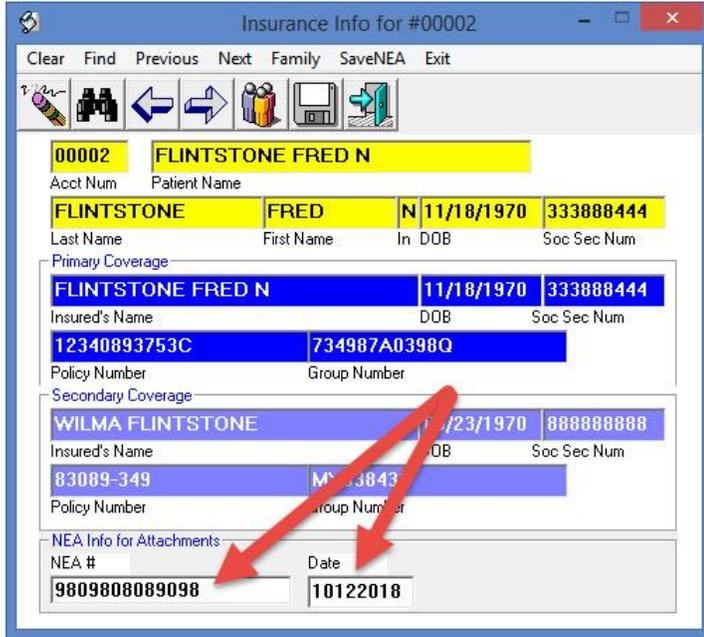
Then you can edit the Insurance Info, including the new **NEA#** and **NEA Date** fields!



# EasyDent Enhancements 2018

10/12/2018

**0043** The **Insurance Info Display** window has been enhanced to allow you to update the Insurance screen's NEA Number and NEA Number date fields. You can start the Insurance Info Display from the **Primary Menu**, using the top toolbar **"Tools"** then selecting **"Insurance Info Display"**. This can be a handy tool allowing you to send info to Fast Attach, get the **NEA Number**, save the NEA Number on the patient's record, then switch to other patients, doing several patients at one time.



**0042** For both electronic and paper claims, you can include **NEA numbers** (typically supplied by **Fast Attach**) by placing them on the **Patient's Insurance screen** into the **NEA# Field**, in addition you will need to place the date of the NEA# in the NEA Date field. These numbers will then be automatically passed along with any claims that are sent within a one week date range of the NEA Date field value.

Acct No	2	Last	FLINTSTONE	First	FRED	Initial	N		
<b>Primary Coverage</b>		Patient DOB	11181970						
Resp Acct#	M	Relationship	FLINTSTONE FRED N	Soc Sec No	333 88 8444	Birthdate	11 18 1970	Sex	M
Policy or ID #	12340893753C		Group	734987A0398Q				Anniversary	MMYY
Carrier Num	547	Update	AETNA, P.O. BOX 85129, RICHMOND, VA 23285-5129						
CarPayProfile#		Pay Profile #	1	List	Phone(800)967-7100 Fax( )				
Employer #		Address	ABC COMPANY		Life Time Max				
		City	2300 GRAND AVE	State	MO	Zip Code	63111	Yearly Max	
Comments									
NEA #	9809808089098			NEA# Date	10122018				
Primary Claim Dates		Last Real Claim		Last Estimate					
Insurance Filing Should be:									
<input type="radio"/> Monthly <input type="radio"/> Annually <input checked="" type="radio"/> Always									
<input type="radio"/> Quarterly <input type="radio"/> None(Automatic)									

# EasyDent Enhancements 2018

---

**10/11/2018**

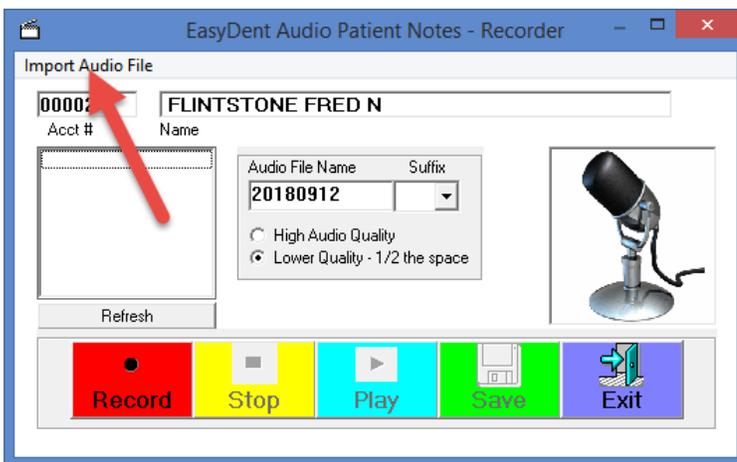
**0041** There is a new report to view Credit Card payment details along with subtotals by the date. From the Reports Menu select, Monthly Reports, then click the new button labeled “**Credit Card Payments Detail**”.

**0040** The posting screen has an additional Adjustment Entry field allowing you to post two adjustments at the same time. This can help with more complicated insurance payment/adjustment combinations.

---

**09/12/2018**

**0039** On the EDR Audio Notes screen there is new top toolbar option “**Import Audio File**” you can use to import audio files you have created outside of the Audio Notes recording window.



**07/27/2018**

**0038** The Daily Pop Up **Reminder screen** has a new option you can set so that when you login once a day it will review all Patient’s that have a **Monthly Payment Amount** on their General Screen, have a **Balance**, and haven’t made a **personal payment in 45 days** (you can control the # of days); display a message on the Reminder screen. To activate this option, use the “**Reminders**” button from the Primary Menu, then check the option called “**Double Check Patients with Monthly Payments Amt’s**”.

**07/22/2018**

**0037** The Management Report for the **Over Due 24 Month Recall** report has a new option you can check labeled: “**Create Excel CSV Format Output File**”. This will create a file you can open with Excel containing the data.

**0036** The “**LabCheck**” feature from the Primary Menu has a new field you can use to specify to “**Skip Labs Older than:**” the specified **number of months**. This way you could easily eliminate labs older than 3 months, 6 months, 12 months, 18 months, etc.

**07/10/2018**

# EasyDent Enhancements 2018

---

**0035** There is a new Orthodontic Picture Layout feature that lets you organize sets of orthodontic pictures on one page, as many different sets as you like based by date. From the Primary Menu you can use the EDR Drop down arrow and select “**Orthodontic Picture Layout**” or from the Images display window using the new “**Ortho Layout**” button.

**06/28/2018**

**0034** The Schedules Wait List feature has been improved. You can access this feature from the schedule using the top toolbar “**Appts**” option then selecting “**Wait Lists**” or use the “Ctrl-W” keys.

**06/27/2018**

**0033** On the EDR eCharts, if you try to open the “Notes” tab and someone else has it open for the same patient, the warning you receive will now give you a choice to browse or view the text.

**0032** On the EDR Visit Note screen, you can click to top “Window” option, then select a new option “View eChart Notes” to browse the eCharts Notes Tab Window text. This lets you browse the text even of another user has the text window open.

**06/25/2018**

**0031** There is a new Employee Time Clock option you can activate, so that if an employee tries to Time Out (during a regular day) with a time period of more than 5 ½ hours, they will be asked if they forgot to time out for lunch and given the opportunity to do so. To activate this option, from the Time Clock Menu select the top toolbar “Tools”, then “Options”, then check the option labeled “Activate Lunch Timeout Double Check”, and save and exit.

**06/22/2018**

**0030** When using the EDR Visit Notes screen if you try to open notes for a patient that another user is current accessing, you will be given an option to Browse the patient’s visit Notes.

**0029** By default the General Screen times out after 10 minutes of in-activity and returns to the Primary Menu. You can now control how long the time out period is. From the General Screen select the top toolbar “Tools” then “Options”, then “General Screen Custom Options”. You can fill in the number of Minutes for the Automatic In-Activity Timeout, up to 999 minutes (16.65 hours).

---

**06/19/2018**

**0028** There is a new Desktop Email program you can use to send emails to Patients and/or other Dentists. You can even create and attach an encrypted zip file that contains x-rays, visit notes, and/or dental history. From the Primary Menu select the “Send Email” button. Once on the Desktop Email screen you can select the top toolbar “Help Video” option, to view a 13 minute training video. You can also view the video from [www.ezdent.com/Swf4/DeskTopEmailProject.html](http://www.ezdent.com/Swf4/DeskTopEmailProject.html)

**0027** You can create a PFD file that contains the Patient’s Individual Bill. From the Patient’s General Screen, select the top toolbar “Print”, then “Bill Individual”, click “Export for Emailing” option. It will create a PDF file containing the patient’s current individual bill into a special folder C:\Temp\EmailAttachments.

# EasyDent Enhancements 2018

**0026** You can create a file that contains the Patient's EDR Visit Notes. From the Patient's EDR Visit Note screen, select the "View All Visits" button on the lower left hand side of the screen, then select the top toolbar "Export for Emailing" option. It will create a PDF file in the image of the report and tells you the special folder it places the file in (C:\Temp\EmailAttachments).

**0025** You can create a PDF file that contains the Patient's Ledger Dental History (procedures only). From the Patient's General screen, select the top toolbar "Print", then "Dental History", and then select the top toolbar "Export for Emailing" option. It will create a PDF file in the image of the report and tells you the special folder it places the file in (C:\Temp\EmailAttachments).

## 06/05/2018

**0024** You can now easily swap a patient's Primary and Secondary insurance carrier information; if needed. From the Patients Insurance screen, select the top toolbar "Tools" option then select "Swap Primary and Secondary Carrier Info".

## 05/22/2018

**0023** When Posting Charges if you leave the Date of Service field blank today's date will automatically be filled in.

**0022** If you are posting a payment and the On Screen Dentist Number doesn't match the Dentist Number of the last charge posted, you will receive a warning asking if you wish to change the Dentist Number to the dentist of the last charge posted.

## 05/15/2018

**0021** A new criteria has been added to the "Patient Search by Criteria" report. If you check the criteria labeled "Dependent Active/Resp Not Active" you can get a list of all Active Dependents where their Responsible Party Account is Not Active.

## 05/13/2018

**0020** The LabTrack screen has a new button "View/Re-Print Lab Slips" to display or re-print lab slips.

Lab Tracking

00002 FLINTSTONE FRED N  
Acct No Name

Line #	Lab Number	Date Sent Out	Date Promised	Date Returned	Try In Date	Date Finished	Amount \$
1	3 BETTER TEETH, INC.	04242018	05162018				
2	2 MONSANTO LABS	05122018	05252018				
3							
4							
5							

Store Copy of Printed Lab Form in EDR Documents Folder

Save Add New Entry Line Print Labslip &/or Record Details **View/Re-Print Lab Slips** Mark as Finished Update Lab File Cancel Save/Exit



# EasyDent Enhancements 2018

04/19/2018

0014 The Treatment Plan Report has several enhancements:

- Selecting a Date Range is easier
- You can specify to display the Detailed ADA procedures along with the patient
- You can specify to Skip patients in Collections
- The report displays the total dollar value of the treatments plans listed
- The report displays the patient's Cell Phone number along with the other phone numbers
- When viewing the report you can click on a Patient's name to open their Treatment Plan

## Treatment Plan Search

Dentist Number or   Only Select Active Patients  List Detailed Procedures  
 00 for all  Skip Patients in Collections

**Which Patients to Select**

1.  Select All Patients with Treatment Plans  
 2.  Select Based On ADA Codes Below

All Dates  Last 12 Months  Last 3 Months  Last 18 Months  
 Last 6 Months  Last 24 Months  Last 9 Months  Manual Date Range

From Date:  To Date:

ADA Codes for Option 2:


### Treatment Plan Report Display

**TREATMENT PLAN LISTING**  
 Dates: 01011980<-->12312999 All Dates  
 Dentist: 00 (Active) (Skip Collection Accts)

John Doe, DDS Mary Smith, DMD  
 04-19-2018 08:09AM

Patient Name	Acct#	Dollars	# Proc	Age	Home Phone	Work Phone	Cell Phone	Comments
JANE AUSTEN	13	133.00	4	68	573 767-6767	573 111-2222	816 777-1234	OOT WITH THE MILITARY
			00150	NA	NA	Comprehensive Oral Eval.		
			01120	NA	NA	Child Prophylaxis		
			00274	NA	NA	4 B.w. X-rays		
			02780	31	NA	Crown 3/4 Cast High Noble		
DORIS DAY	66	132.00	4	35	314 111-2222	573 222-3333		
			00150	NA	NA	Comprehensive Oral Eval.		
			01120	NA	NA	Child Prophylaxis		
			00272	NA	NA	2 B.w. X-rays		
			01203	NA	NA	Top. Appl. fluoride/child		
YANKEE DOODLE	77	133.00	3	68	573 767-6767	573 111-2222		
			00150	NA	NA	Comprehensive Oral Eval.		
			01120	NA	NA	Child Prophylaxis		

Total Patients Searched = 276  
 Total Patients Matched = 4  
 Percentage Matched = 1.45%  
 Total Dollars = \$ 630.00  
 End of Report

Print

Click on Patient Name Line to View Patient's Treatment Plan Window

Account Number Work File was Generated

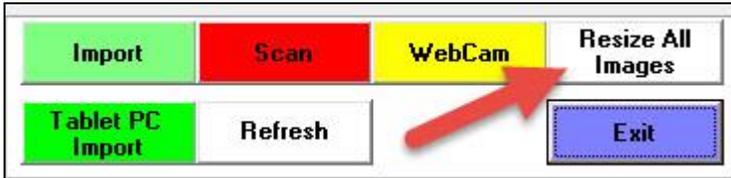
Exit

# EasyDent Enhancements 2018

---

**04/13/2018**

**0013** There is a new feature to Re-size your Jpg Images in the **Images Photo Folder**. This can reduce the size of the stored Jpg images up to 10 times smaller, saving lots of space and making your photos display much faster. On the Images screen press the new button “**Resize All Images**”. This will display a screen that lets you resize all the photos into a work file and then copy them back replacing any original image that’s larger with the resized smaller one.



**04/10/2018**

**0012** The Patient Lab Tracking screen will not allow you to print lab slips from any of the 5 lab entries on the screen, not just the top entry.

---

**03/28/2018**

**0011** When printing a Patient Ledger Format 3 there is a new option called “**Sort by Date of Service VS Posting Date**” you can check to list ledger items in order by Date of Service regardless of the posting date order.

**03/01/2018**

**0009** The 24 Month Overdue Recall report has been enhanced to only list “**Active**” patients. You can run the report from the Reports Menu, then Management Reports, then check the option “Overdue Recall Last 24 Months”.

**02/22/2018**

**0008** There is a new Insurance Detail 2 screen that lets you document many more detailed insurance coverage items for the patient. You can access this screen from:

1. Insurance screen - use the “**Ins Det 2 Coverage**” button.
2. Insurance Detail screen - use the “**Insurance Detailed 2 Screen**” button.
3. Posting screen - use the top toolbar “**Window**” option then select “**Insurance Detail Coverage**”.
4. Treatment Plan screen - use the top toolbar “**Window**” option then select “**Insurance Detail Coverage**”.
5. Scheduling screen - click on the patient’s time slot name entry, click the “**AddOptions**” button, then select the “**Ins Det Coverage**” button.

**02/13/2018**

**0007** On the Schedule when you click on a patient’s appointment name slot, there is a new button called “**Service**” you can use the change the type of service for the appointment. This can be helpful if you accidentally click the wrong service type when making the appointment.

# EasyDent Enhancements 2018

---

**01/25/2018**

**0006** When you use the WebCam interface from either the General screen or the Schedule to take a patient's photo; if a previous photo already exists you will be prompted if you would like to archive the previous photo. If you do archive the photo it will be placed in the patient's Documents **PatInfo** folder and named PatPhotoMMDDYY (the MMDDYYYY is the date of the original photo). If you do not like being prompted to archive the previous photos, you can use the top toolbar "Tools" option on the WebCam Interface screen to De-Activate the Auto Archive Prompt.

**0005** From the General screen when you click on the patients photo the large display window has the date the file was created on its title bar. This way you can see how old the photo is.

**0004** You can open the "Documents Mini View" screen from the General screen by using the top toolbar "**Window**" then "Electronic Dental Records", and then "**Mini Documents Folder**". This way you can access the EDR Documents folder without leaving the General screen.

**01/15/2018**

**0003** When printing a Family Style Statement from a patient's screen (i.e. General Scree, top toolbar "**Print**", then "**Bill Family**") you can now easily include a Message or Comment by clicking on the new "**Message/Comment**" field.

**01/04/2018**

**0002** On the Patient's Treatment Plan screen there is a new button labeled "**Acct Summary**" that you can use to display the patient's ledger's summary history. This way you can easily see what has been charged year-to-date and what has been paid year-to-date.

**0001** On the Patient's Treatment Plan screen, if the patient is connected to an Insurance Payment Profile the profile name display in the upper right hand corner of the screen now shows the profile's Deductible/Year and Maximum/Year. You may use the "**Ins Profile**" button or click on the Red Ins Profile Number label to see the whole payment profile.