

EasyDent Internet Training

Session 1 – Approximately 2 to 2 ½ Hours

1. Computer Basics
 - Monitor, System Unit, Keyboard, Mouse, Printers, and Scanners
 - Cover Windows Start Up and Shut Down.
 - Cover Work Stations Start up and Shut down Sequence.
2. Start Up EasyDent and cover Sign in User ID and Password.
Single Click and ENTER is OK
3. Use Advanced Utilities and Set Up User Names.
4. Describe Primary Menu Options and Aids.
5. Discuss how to Exit *EasyDent*, Windows X VS Logout.
6. Scheduling
 - Review Adding New Patients right on the Schedule
 - Discuss how you don't need to capitalize!
 - Cover Setup of Defaults.
 - Use Zip Code List.
 - User Referral Option Button.
 - Click on and changing all or part of a data field
 - Patient Photographs
 - Moving up and down through the Schedule
 - Changing Dates in the Schedule
 - Scheduling Existing Patients finding patient first
 - Scheduling Existing patients finding the Time Slot first
 - Moving Appointments
 - Canceling Appointments
 - Schedule Reports
 - Blocking Time & Model Day Templates
7. General Information Screen.
 - Discuss the three Screen layout.
 - Show how to use the cursor movement and editing keys.
__Right Tab __ Left Tab __ Enter Mouse
 - Help Command Icon and On-Screen Videos
 - Discuss all Data Fields
 - Add name & address information, Default can be set to hide Soc Sec Num
 - Explain how to enter RESP ACCT number for families
 - Explain the uses of all the Icons and buttons, making sure that they know Pressing SAVE is not required.
 - Discuss UNDO option
 - Show how to find patients by: Name, Account Number, Phone Number Social Security Number, First Name, or any field on the patient record.

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8. How to change an existing patient's name
 - From Aids options
 - From General Screen Tools option
 - Show Alias name change history window

9. Entering Patient Insurance Information
 - Insurance Primary and Secondary
 - Insurance Detail Screen

10. **Overview** of Posting will cover in detail during Session 2.

11. Backup
 - External Daily backup
 - Live Daily automatic backups