EasyDent Newsflash
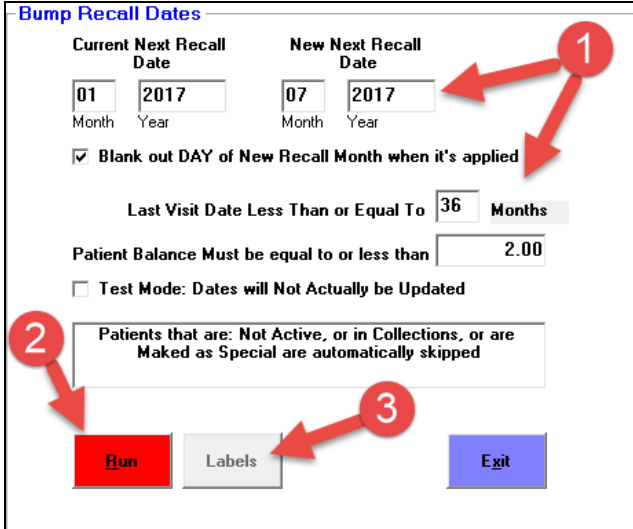
DataTec

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March 2017

2017 Updates

1) Recall:

Don't let difficult-to-reach, overdue Recall patients disappear! Move their Next Recall Date down the road a little. From the **Utility Menu**, select "**Recall Date Updates**". Then, select **option 1**, repeat, and select **option 2**. You can **specify new criteria** to skip patients that you don't want changed. Some offices like to keep sets of Recall Cards by Month; typically, the patient filled them out. You can use the **Labels button** to easily print labels and create a new set of cards for them. Remember, EasyDent also allows you to print the Recall Cards or Labels when needed.


2) Monthly Reports:

A) Yearly Analysis shows Adult & Child **Prophys** broken down by month.
B) Yearly Analysis has a more complete breakdown on Insurance payments by type,
C) indicating how much was Insurance Check, Insurance Charge Card, and Insurance Electronic Funds Transfer
D) Use the "**Year to Date Practice Pulse**" button to quickly compare this year to last.
E) Use the new report "**New Patient List**". It's a quick way of viewing and/or accessing New Patients based on the First Visit Date on their General screen.

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3) Scheduling

A) The Schedule Name Search window has a new field called "**Text Search**". You can search any text within a Patient's Name or General Screen. Example: Phone Numbers, Email Address, Street Address, etc. In this example, we used the phone number. Note: The matches will be listed in account number order, not alphabetically.
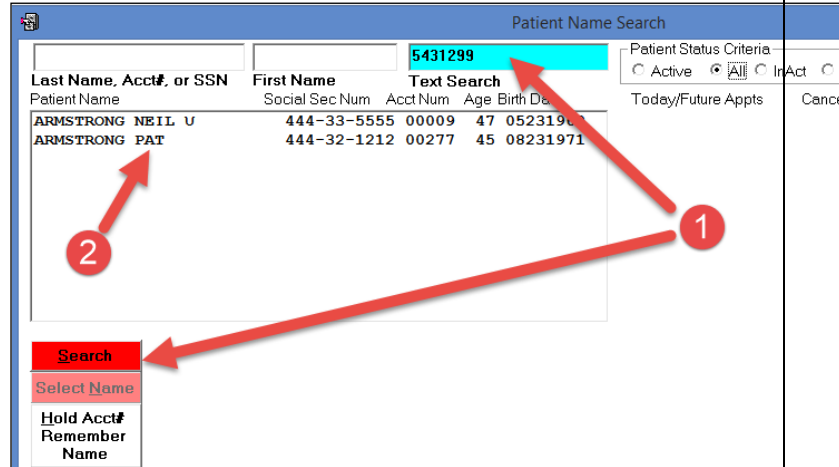
B) On the Non-Browse Schedule, you can include **multiple services on one line** which can increase the total calculated value of the day. If there is a service on a line, you can easily add more services by **clicking on the line** then clicking the top toolbar "**Services**" option and select your service. Refer to update #5 below to learn how to have more characters per time slot.
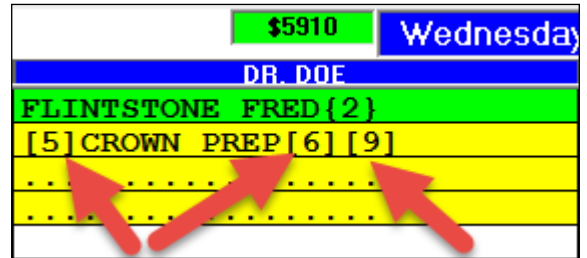

C) On the Non-Browse Schedule, you can enter **more characters per time slot** (up to **42**). Set this option from the **Top of the Schedule** screen, select "**Utilities**", then "**Utility Options Menu**", next "**Set Scheduling Options**", then check "**More Characters per Time Slot**".
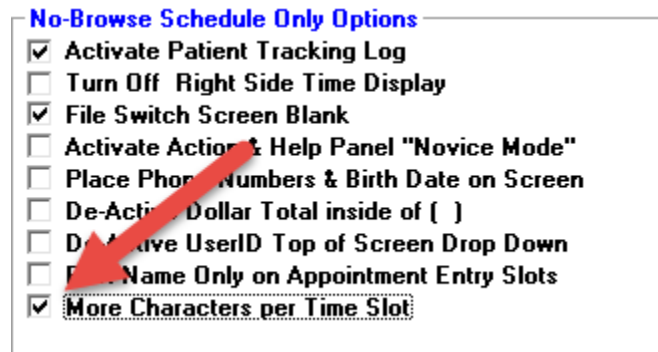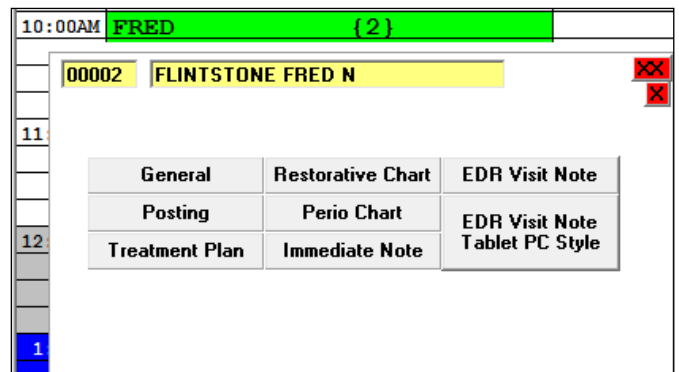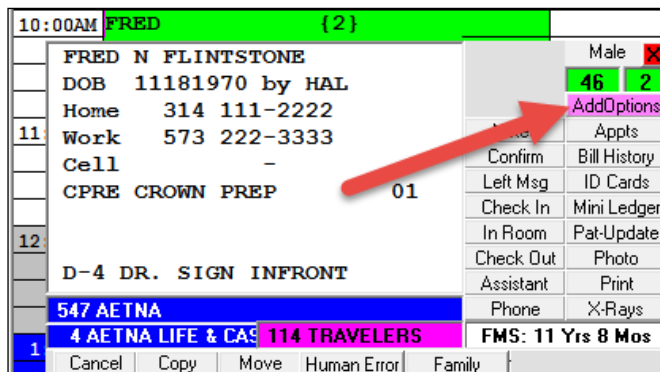
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3) Scheduling, continued……..

D) You can optionally place the **patient's First Name** and account number on the **Schedule**. Printed reports will still show the patient's complete name. If you leave the Schedule on the screen in the operatory, it will be more private. To set this option from the **Top of the Schedule** screen, select "**Utilities**", then "**Utility Options Menu**", next "**Set Scheduling Options**", then check "**First Name Only on Appointment Entry Slots**".
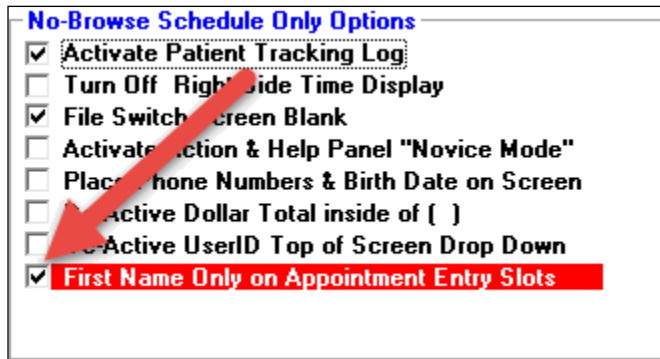

E) When you bring a patient up on the Schedule, there are Additional Options you can select to perform several common functions *without* leaving the Schedule. Once you click on a patient's name entry, click on the "**Add Options**" button.

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4) Miscellaneous:

A) When printing Treatment Plans, there are new "**Line**" checkboxes you can optionally use to drawn lines between sets of procedures listed on the print-out. You can show groups of codes that might be used for different appointments.
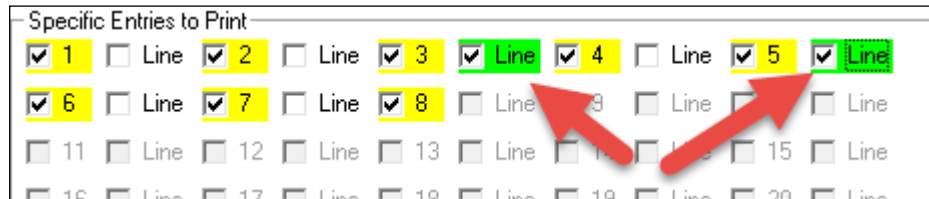
B) On the **Restorative Chart,** you can use the top toolbar "**Tools**" then select "**ADA Explosion Codes**" to set up a list of ADA Codes that, when entered, will trigger multiple codes for the Treatment Planning or Completed Today lists. One code can expand up to 6 codes.
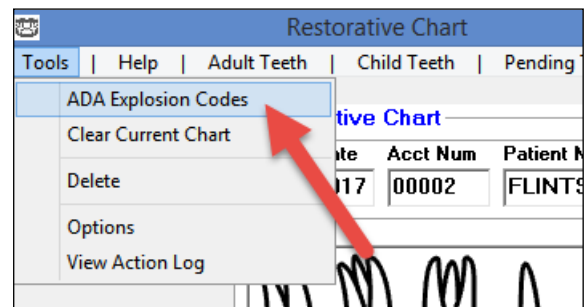
C) The **Patient by Criteria Search** report has new Recall Month and Date Range fields for both Next and Last recall dates.

Thank you for your continued support and great enhancement ideas!

Cordially,

Hal Goodall &

All Your EasyDent Staff ☺