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Sept. 2015

September Newsflash

Increase Year End Revenue:

It's a Great Time of the Year to encourage your patients to use their Insurance benefits and schedule a Recall visit or visits to finish up their Treatment Plans before the end of the year.

Learn how to use the "**Patient Recall Search**" report, to create telephone list, recall cards, mailing labels, or send emails, to remind patients to take advantage of their Insurance.

From our website www.ezdent.com select the top **Support Tab**, then the **"Practice Management Videos"** button on the right, and the "[Patient Recall](#)

Improve Revenue & Efficiency:

We have made several enhancements, including scheduling reminder of patients that need Pano's or Full Series of X-Rays, a better way to handle "**Care Credit**" payments, etc. The following pages cover these enhancements.

Disaster Recovery:

The time to prepare for data failures is **now!** You should be:

- 1) Taking Daily backups out of the office, rotating through at least 5 different backup devices.
- 2) Letting EasyDent perform cross network backups to different computers on different days. You can minimize them while they run and continue on working. Also, remember these backup patient billing & scheduling info, but not documents you scanned in or imported.
- 3) As an added layer of protection use an Internet backup service like www.MozyPro.com

Your Friends at Data Tec ☺

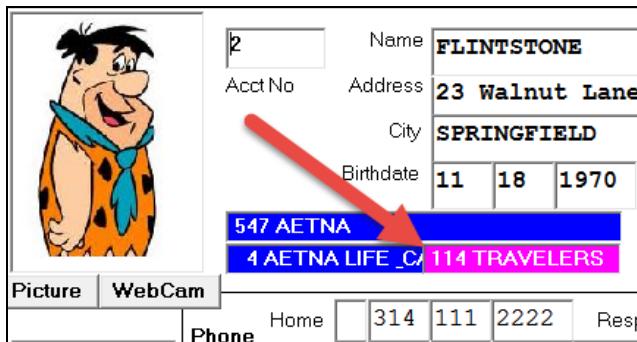
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Posting

- There is a new posting payment code you can use "CC" for Care Credit. It will Report the payment as an electronic "Patient" payment. Making your Bank Deposit Report totals easier to use.
- On the Posting screen there is a new top Toolbar option called "Links". You can use this to define and then access Internet Links easily from the Posting screen.

Insurance

- The Patient's Insurance screen has been enhanced as follows:
 - There is a new button "Update", to the right of the Carrier Number, it can used to Search for a Carrier and Update the Carrier Number.
 - The "Ins Updte" button has been relabeled to "Carrier Up" to be clearer.
 - The top toolbar "Help" option has a new sub-option to view the "Help Video".
- If a patient has a third insurance the third carrier is automatically listed on the patient's General, Posting, and Ledger screens. Also, remember if you click on one of the carrier's names, an insurance info screen for that carrier will pop up.



- When printing Medical HCFA 1500 claim forms from patient screen, there is a New option that you can print that supports ICD-10 Diagnosis codes. Select the Option called "Medical HCFA 1500 NPI - 2015 Version". Remember you will have to change your Diagnosis Code definition from the Utility Menu to be the ICD-10 codes you want to use.

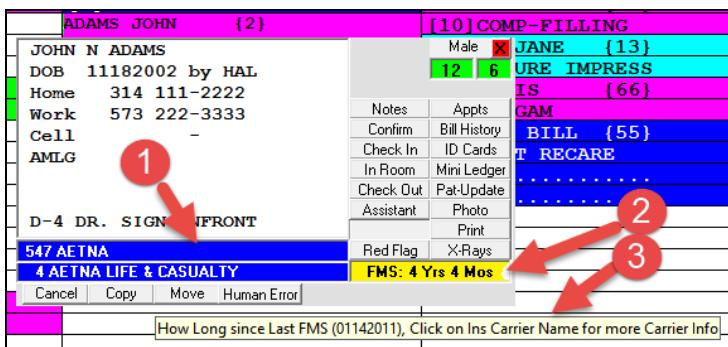
Perio Charting

- The General Perio Chart has been enhanced as follows:
 - When you indicate a tooth is missing all empty Perio Slots for that tooth are automatically filled in.
 - If you click on the right hand column of tooth slots a pop up window will let you easily enter data, for example "Missing".

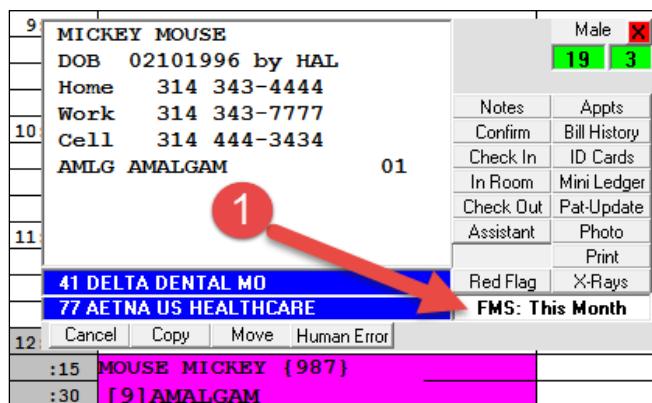
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Scheduling

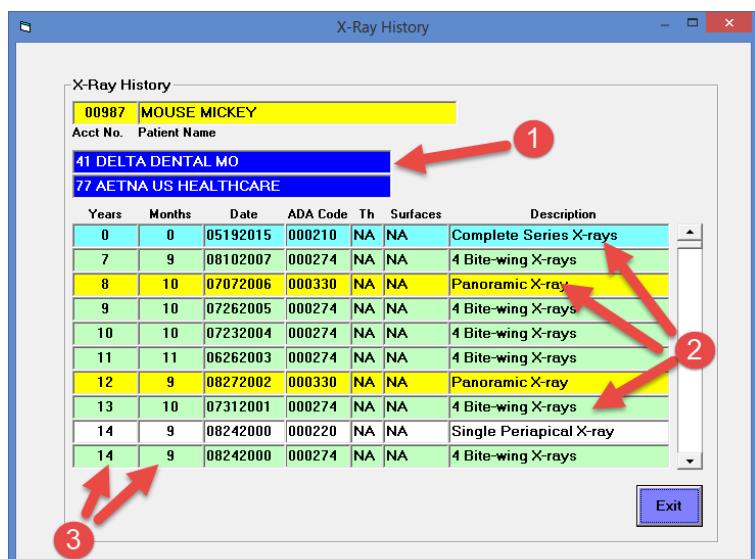
- The Non-Browse Schedule will automatically size the height of the right hand side scroll bar to fit the screen.
- The Schedule Name Pop Up Window has improved.
 - 1- Both the Primary and Secondary Insurance Carrier Names are displayed. If you click on a Carrier name, more info will be displayed.
 - 2- Automatically how it's been long since the last Full Mouth Series "FMS" is displayed. If it's been over 2 Years and 10 Months or they have never had a FMS it will flash.
 - 3- If you place the mouse over the FMS field the actual FMS date will be shown.



- There is a new X-Ray History window available. This lets you quickly see a Patient's X-Ray History, it's even color coded.
- From the Schedule Patient Name Pop Up, click on the "FMS:" Indicator The pop up X-Ray History window will have:
 - Patient's Insurance Carriers, you can click on them for more information.
 - A color coded list of X-Ray procedures from the patient's ledger.
 - A prefix that lets you easily see how long ago the X-Rays were taken.



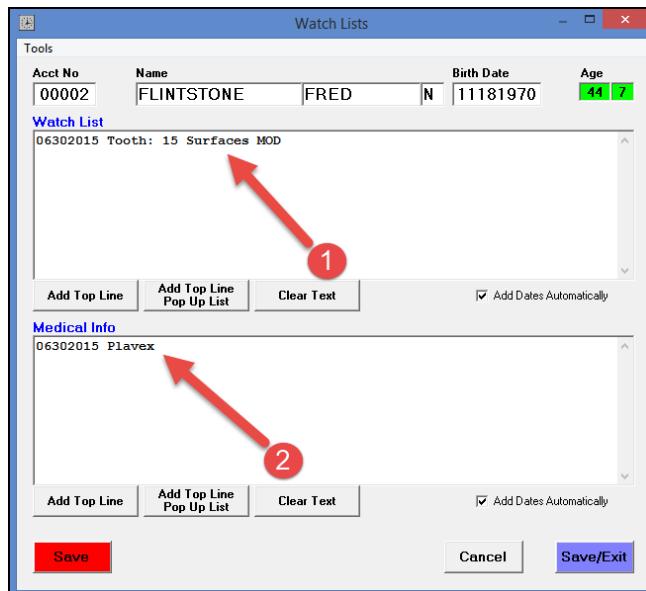
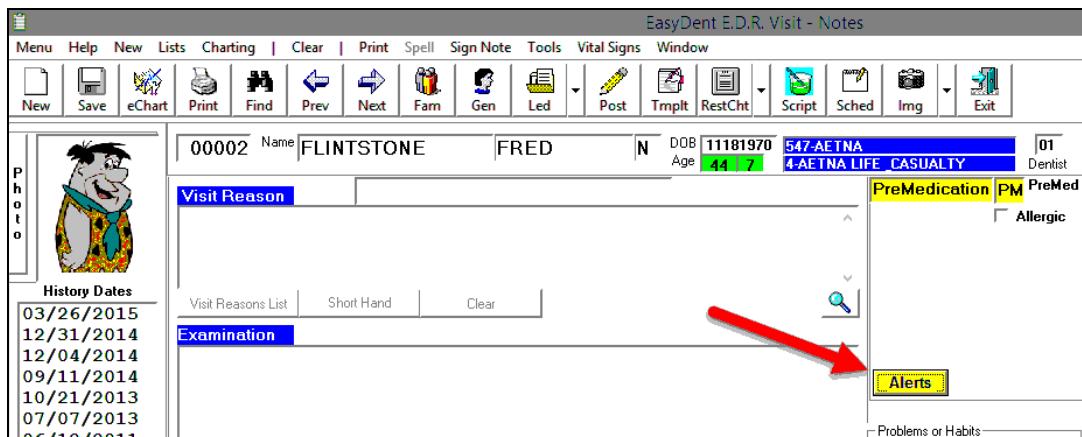
You can also display this list from the Patient's General screen, by selecting the top toolbar "Window", then "X-Ray History".



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Electronic Charts “EDR”

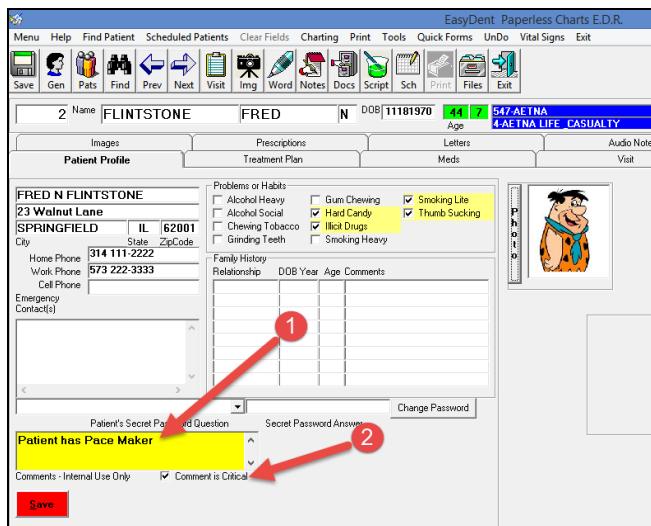
- On the Patient's Electronic Chart Profile screen they can be marked as “Pregnant”. If you do this it will also show up on the Patient's General Screen. If somehow in the past the patient was marked as “Pregnant” and they are “Male”, you can simply bring up the General Screen and press Save to correct their record.
- From the EDR Visit Note screen, you can now use the top toolbar “Tools” option then “Print Shorthand & Templates”, then, “Print Short Cuts”, and finally the new Green button to print all the Short Cuts for each area with multiple shortcuts per page.
- There is a new Window called the Watch Lists that you can use from the patient's EDR Profile and Visit Note screens. Just click the “Alerts” button to display this window. You can easily put dental conditions to keep an eye on, as well as any medical conditions you want to be reminded of. Anytime there is information on this Watch List window for a patient, the “Alerts” button will flash. Hint: Use the “Pop Up List” buttons for quick data entry.



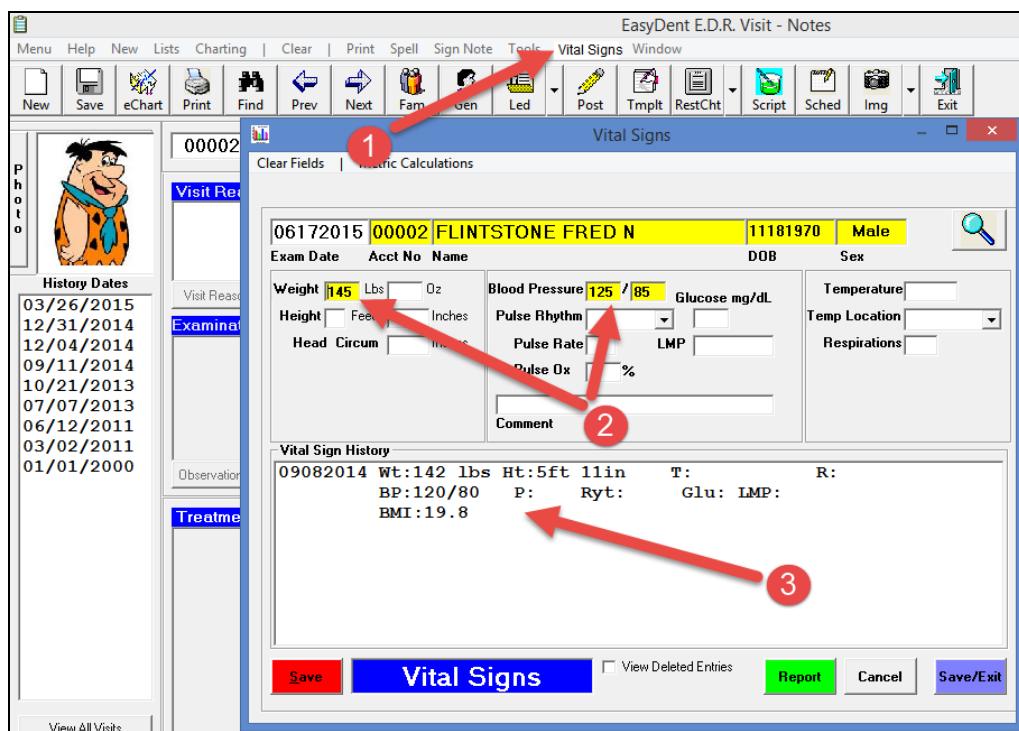
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Electronic Charts “EDR” continued...

- The Patient EDR Profile has a new window where you can enter “Comments - Internal Use Only” Notes. Also if you click the “Comment is Critical” Check box, then whenever you bring up the Patient’s EDR Visit Notes Screen, the Critical Note will automatically be displayed. This is typically used for Clinical type notes that you want to be reminded of each time you see the patient, but it could be any type of note.



- The EDR Visit Notes & Patient Profile screens have a new option to enter and track a patient's Vital Signs.
- From the top toolbar click the “Vital Signs” option
- You can Enter New Vital for the Visit
- You can also see a history of their Vital Signs



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Reporting

- On the "Patient Search by Criteria" report there is a new Criteria you can use "Pregnant".
- The Reports Menu "Estimated Charges Search" report defaults to a 2 year range.
- The Birthday Report from the Reports Menu, has a new option you can check called "Export Data to CSV Excel Type File". If this is checked, when you click the Red "Run" button, a file called "C:\Temp\BirthDateExport.csv" will be created. In addition, a button called "Open Export File" will be displayed after the file is created to let you open it. You can use this file with services for patient Birthday greetings, etc. Be careful regarding security concerns, this file will contain patient identification information of Name, Birthdate, and Address.
- On the "Management Report" screen, there is a new report you can run called "FMS Audit". This report lists patients that may have an incorrect FMS Date on their General screen. In addition, there is a button you can press to reset the FMS Date on the patient General screens based on report results.
- The Patient Search by Criteria has 2 new features
 - You can specify a date range for FMS (Full Mouth Series)
 - You can create a cross reference report by running the Transaction Search report first, then check "Use Transaction Act File" option so that the Only patients considered for the Patient Search by Criteria report will be The ones you found from the Transaction Search report.
- The Management Graphs for comparing 10 years has new criteria you can set to compare year to date portions of the years. The default is still for the entire year, but you can specify an optional "Ending Month" and "Ending Day" to be considered for each year. For example: you could compare the first 5 months of each year together.

Miscellaneous

- The Patient Screens including the; General, Ledger, Posting, Insurance, and Treatment Plan, and Schedule can be customized using Windows to change the both the size and Location of the screen, then pressing the Ctrl F12 keys to remember the settings for your work station. In addition, to using the Ctrl F12 keys, you can also use the top toolbar "Tools" option, then select "Save Screen Size and Location".
- The Mini Ledger Display window has a new yellow button labeled "Full Ledger" that switches you to view the Full Ledger Window.
- The Advanced Utility "Export Patients" program has been enhanced to let you have More control over what patient data fields are exported. This can be useful if you are giving data to companies helping you with marketing.
- The Monthly Finance Charge option, has a new toolbar option "Video Training" that will let you watch 2 new training videos for Monthly Finance Charges.

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Miscellaneous continued...

- There is a new Global Option you can set to force Patient Address Information on the Patient Add and General Screens to be Upper Case when you add new data or use the Save function. To set this option from the Primary Menu use the "Options" button, and Check "Enter and Save General Screen Address as All Caps".

This DOES NOT automatically change existing records, but you can run a Utility function to change all Existing General Screen Addresses to Upper Case. To do this use the Utility Menu option "Global Changes" then click the button labeled "Change all General Screen Addresses to Upper Case". You will need to work with Data Tec during the process so that Data Tec can supply the required password.

- If you have a User ID set not to allow access to the Patient Ledger screen then they will automatically **NOT** be allowed access to the Print Ledger programs.