# *EasyDent* In-Office Training

EasyDent is designed from the ground up to be Easy to Learn and Use!  This makes the training cycle much faster and easier than most other systems.

In-office training is structured to be easy and flexible while still being extremely effective.  The training is designed to be given in separate sessions, with time between each session so that the staff can practice what they learn in a progressive manor.  Typically, sessions are days or weeks apart, from 3 to 5 separate sessions depending on the practices needs.

It’s always helpful to have the initial training before your actual implementation date.  Then schedule the secondary sessions once you actually start using the system.

Both the Topics covered and their order can be altered to best fix the practices specific needs.  Time is allowed during each session not only to cover the topics but to have the staff to actually try the functions themselves, and naturally to ask questions.

All training topics are support by the built-in computer videos and help screens.  Naturally, you can always call our support line for person to person assistance.

The following pages are a general outline of the in-office training sessions.

# *EasyDent* In-Office Training

Session 1 – Approximately 3 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. Cover Sample Files Activation and Real Files.

6. Discuss how to Exit *EasyDent*, X and Logout.

7. Adding new patients, from Scheduling and Full Add
   - 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

8. 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 and address information
   - 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.

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

# *EasyDent* In-Office Training

Session 1 – Approximately 3 ½ Hours

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

11. Scheduling
    - Review Adding New Patients right on the Schedule
    - 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

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

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

# *EasyDent* In-Office Training

Session 2 – Approximately 3 Hours

**Review:**

1. Adding New Patients
   - From the Schedule
   - Full Add Screen
2. Back Up

**New Topics:**

1. POSTING
   - Discuss split screen, all Data Fields
   - Help options
   - Show how to Post Charges
     __ ADA Code Double Click __ Shorthand Code
     __ ADA Codes List __ Groups of ADA Codes
   - How to Post Payments, patient and insurance
   - How to Post Adjustments

2. Print walk out receipts
   - Individual
   - Family

3. Patient Financial Ledger Screen
   - Data areas and scrolling.
   - Deleting an entry
   - Making Corrections

4. Daily Reports
   - Audit - Day Sheet - Bank Deposit - Schedule Cross Reference
   - Nightly Call Sheet

5. Utility Menu
   - Company Name and Address
   - Adjustments Code Updates
   - ADA Fee Schedule Updates
   - Insurance Carrier Updates
   - Insurance Payment Profiles

6. Printing Insurance Claims
   - Individual
   - Batch
   - Estimates or Pre-Determinations

7. Electronic Insurance
   - Primary and Secondary Claims
   - Estimates
   - Resubmitting claims

# *EasyDent* In-Office Training

Session 2 – Approximately 3 Hours

8. Insurance Reporting
   - Daily Log
   - Non-Submitted Claims
   - Overdue Claims

9. Patient Forms
   - Quick Form Letters
   - New Patient Information Sheets
   - Work Tickets

10. Referral Tracking
    - Referrals from other doctors, patients, & marketing
    - Outward referral tracking

11. Employee Time Clock
    - Defining Employees
    - Timing In and Out
    - Corrections
    - Time Reports

12. Review all Topics

# *EasyDent* In-Office Training

Session 3 – Approximately 2 ½ Hours

**Review:**

1. Posting and Corrections
2. Scheduling

**New Topics:**

1. Collections
   - Aging reports
   - Finance Charges
   - Payment Plans

2. Patient Statements
   - single style statements
   - family style statements
   - electronic statements

3. Recall
   - Recall Dates, automatic and manual
   - Bumping Recall Dates
   - Recall Cards, current and overdue
   - Recall Reports, current and overdue
   - Recall Letters

4. Treatment Planning
   - Creating Treatment plans
   - Printing contracts
   - Estimates or Pre-determinations
   - Tracking Treatment Plan activity

5. Prescriptions
   - Creating Scripts
   - Printing or Faxing Scripts

6. Practice Analysis
   - Transaction Ledger Overview Reports
   - ADA Code production analysis
   - Referral report analysis

7. Review All Topics

# *EasyDent* In-Office Training

Session 4 – Approximately 2 ½ Hours

**Review:**

1. Collections & Billing
2. Recall
3. Treatment Plans

**New Topics:**

1. Scanning
   - Patient ID and Insurance Cards
   - Patient forms, new patient, consent, and so forth

2. Charting
   - Restorative
   - General Periodontal
   - Detailed Periodontal

3. Electronic Dental Records
   - Patient Profile Overview
   - Visit or Treatment Notes
   - EDR direct interface with Posting
   - Correspondence
   - Review Prescriptions

4. Digital X-Rays
   - Interfaces with Dexis, Scan-X, VixWin, Apertyx, TigerView, Schick, etc.
   - Importing images
   - Image adjustment and printing

5. Inter-Oral Pictures
   - Interfacing with oral cameras
   - Importing images
   - Image adjustment and printing

6. Review All Topics