Setup Steps

____ 1. Set up Network Definitions and computer links.

____ 2. Install *EasyDent* Software using Installation CD.

____ 3. Set up desired User ID's and Passwords using Advanced Utility Menu "Define User Security" option. (Use "User List" button to see current users, and use "New User" button to add additional users)

____ 4. Review *EasyDent* Training Manual.

____ 5. View *EasyDent* Online Videos from **www.ezdent.com**

____ 6. Schedule Online Training sessions referring to: **www.ezdent.com/technote/EasyDentOnlineTrainingTopics.pdf**

____ 7. Update ADA Fee Schedule from Utility Menu putting in your Fee Amounts.

____ 8. Update most common Insurance Carrier List from Utility Menu.

____ 9. Set up EasySchedule format and options, can do later if you aren't scheduling on computer right away.

____ 10. Practice entering patients, posting transactions, printing insurance. Use "Sample Mode" from Primary Menu to Practice. Remember to Exit "Sample Mode" before logging out.

____ 11 .Add the Names and Addresses of your Active Patients. Have Data Tec Evaluate potential Data Conversion if you have Patient information in another system.

Add telephone numbers if they are also handy. You can add just the patients with balances, if you want. You will add the balance later. Don't add patient insurance information, add it when they come in for their next visit, it may change in the mean time.

Implementation Steps

____ 1. Pick a day or afternoon to enter all outstanding balances. This will go quickly. You will set up a Fake ADA Code such as 99999 to say Prior Balance. Talk to Data Tec we will help you set this up. If you have manual Ledger cards enter balances from the ledger card, and jot down the EasyDent Patient Account Number in red on their ledger card as the balance is entered this is a good cross reference.

You may enter Credit balances by preceding the amount by a minus sign.

You may enter Collection Patient Balances by marking the Collect Flag on the General Screen after posting. Typically, it is a good to enter these balances all together as a onetime process.

____ 2. Once the balances are in run a list of patients and balances by running the Reports Menu, Patient Search by Criteria. Don't put in any criteria and you will get list of all patients. Or put in Balance range .01 to 99999 and you will get patients with positive balances only. There are lots of reports you can run to see what you have entered so far, call Data Tec for help in this.

____ 3. Once Balances have been entered you will need to begin posting the daily patient activity as it occurs, including payments through the mail.

____ 4. At the end of each day run the Daily Reports from the Reports Menu. We strongly recommend the first three reports, Audit, Bank Deposit, and Day Sheet.

If you aren't scheduling on the computer, you can still cross reference your Day Sheet to your manual schedule to make sure everything is posted.

____ 5. Posting it the labor intensive part, once you are posting you can being printing Insurance forms at any time. This is easy, you will love it!

____ 6. You should sign up for Electronic Claims right away, just contact Data Tec! They are much faster, reduces the number of x-rays you have to send, and you get paid much quicker! It's a true win win.......

____ 7. You can print walk out receipts right from the patient screen, or even a statement.

____ 8. Talk to Data Tec to help you run Monthly Statements. They can be ran any time even once a week if you want. We can show you how to do cycle billing. There is also an electronic statement processing you can sign up for, so you never have to stuff an envelope. It even saves money!

Implementation Steps

____ 9. You can put recall dates on patient screens if you want, or wait for 6 months while your daily posting sets the dates for you automatically. We recommend placing them manually the first time on all accounts, in case the patient doesn't come back for a long period of time. We recommend you add all active patients, not just the ones with balances, as time permits.

____ 8. You can begin learning how to print patient form letters quickly and easily, using Quick Forms.

____ 9. Learn how to use the Employee Time Clock, you will love it! You will never have to Manually add up hours again, what a time saver......

____10. If you haven' started scheduling with EasyDent it's time to start learning, it will save time, give a better control on patients with bad accounts, or excessive cancellations.

____11. Began learning how to use the "Electronic Dental Records" features including: Document Scanning, Charting, and Visit Notes.

Remember you can watch Online Videos and schedule Online Training with Data Tec.