

# Easy Dental 12 Series

## Release Guide

Includes information about new features, enhancements,  
and fixes in the following versions of Easy Dental:

12, 12.1, 12.2, 12.5, 12.5 Update 1, 12.5 Update 2, 12.5 Update 3

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## **EASY DENTAL AND MICROSOFT WORD FOR WINDOWS**

Easy Dental can share its database with Word for Windows, a word processing product created by Microsoft Corporation. To use Easy Dental with Word for Windows, you need to license and install Microsoft Word for Windows.

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## **Easy Dental 12.5 Update 3**

# Overview and New Features

This Easy Dental 12.5 Update 3 Release Guide provides information about the Easy Dental 12.5 Update 3 software release. This overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Easy Dental 12.5 Update 3.

**Note:** For information about using the new features in Easy Dental 12.5 Update 3, refer to “Using the New Features and Changes” in this section of the Release Guide or “What’s New in Easy Dental 12.5 Update 3?” in the Easy Dental Help.

## New Features and Changes

Easy Dental 12.5 Update 3 includes the following new features and enhancements:

### ADVANCED SEARCH

By using the filters in Advanced Search, you can search for patients, insurance, employers, providers, and referrals more accurately, quickly, and easily. You can use Advanced Search in any module that requires you to select a patient.

#### Patient Search

- Selecting patients.
- Setting filters in the **Select Patient** dialog box.
- Filtering individual columns in the **Select Patient** dialog box.
- Customizing the **Select Patient** dialog box.

#### Insurance Search

- Assigning insurance to new patients.
- Setting filters in the **Select Insurance** dialog box.
- Filtering individual columns in the **Select Insurance** dialog box.
- Customizing the **Select Insurance** dialog box.

#### Provider Search

- Assigning providers.
- Setting filters in the **Select Provider** dialog box.
- Filtering individual columns in the **Select Provider** dialog box.
- Customizing the **Select Provider** dialog box.

#### Employer Search

- Assigning employers.
- Setting filters in the **Select Employer** dialog box.
- Filtering individual columns in the **Select Employer** dialog box.
- Customizing the **Select Employer** dialog box.

## DOCUMENTS

In the Documents module, you can now apply document tags using Advanced Search, and you can click and drag to reorder the pages in multi-page documents.

## MISCELLANEOUS

You can now simultaneously add multiple X-rays to electronic claims.

# Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release.

## Advanced Search

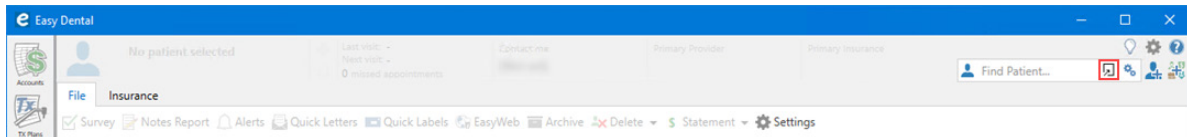
Finding patients is easier with the addition of the Advanced Search feature in the Patient Banner. Using Advanced Search, you can set filters to narrow and focus your search results. You can also use the Advanced Search feature to assign insurance, providers, and employers to your patients.

### SELECTING PATIENTS USING ADVANCED SEARCH

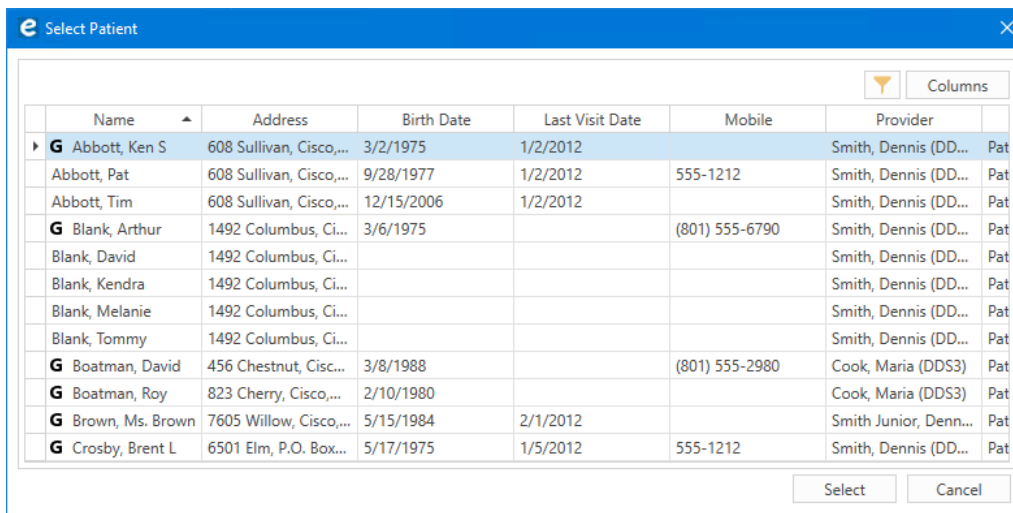
You can use the Advanced Search feature to select patients in any Easy Dental module that requires you to select a patient.

To select a patient using Advanced Search

1. In the Patient Banner, click the Advanced Search icon.

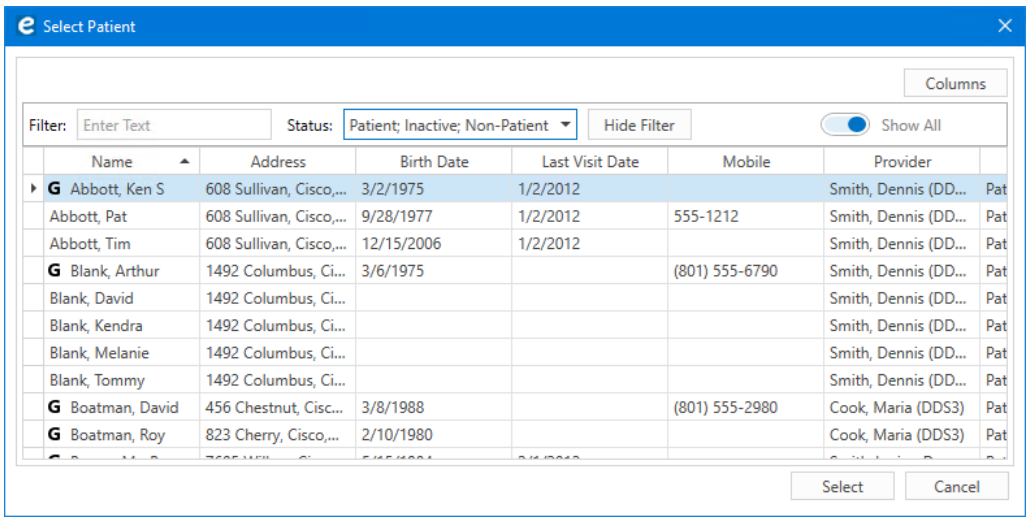


The Select Patient dialog box appears.

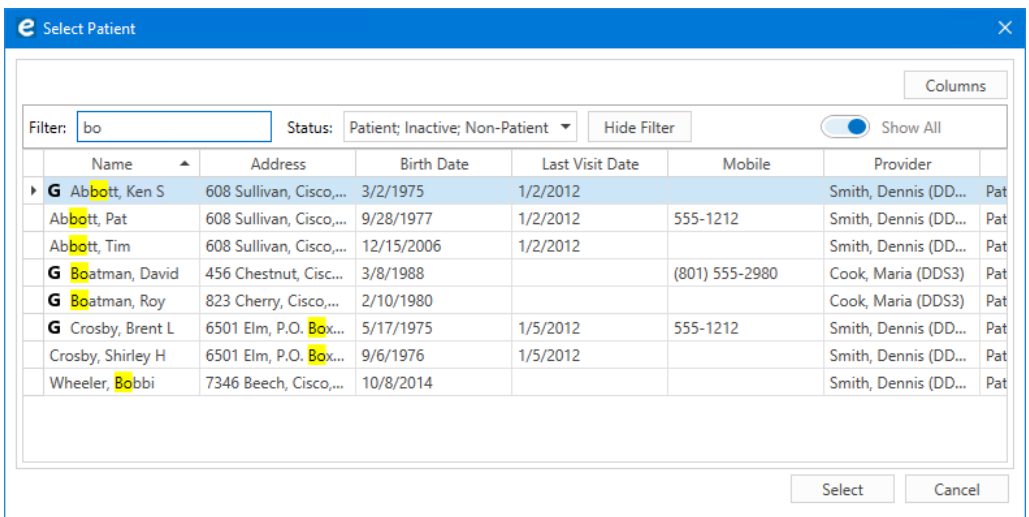
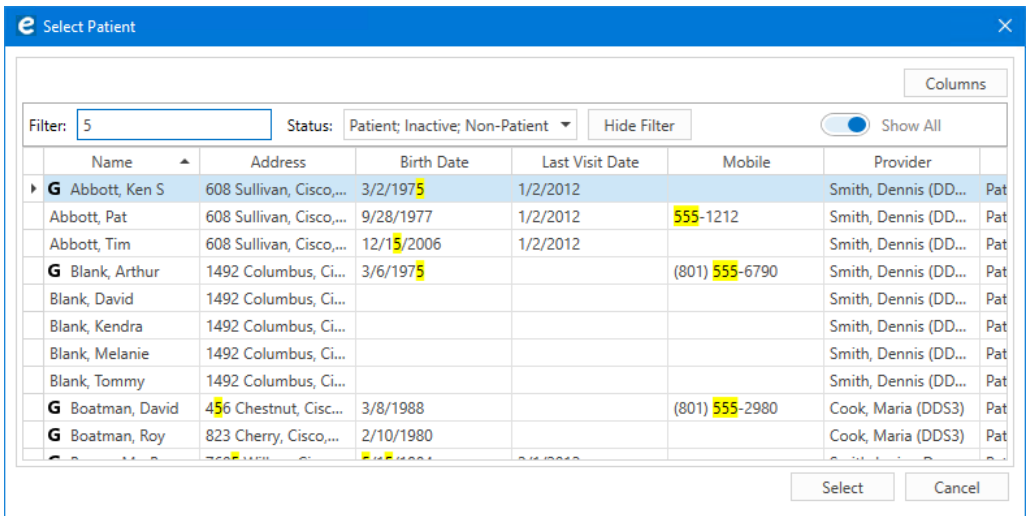


2. To filter the search results, click the Filter data icon adjacent to the **Columns** button.

The **Filter** search box appears.

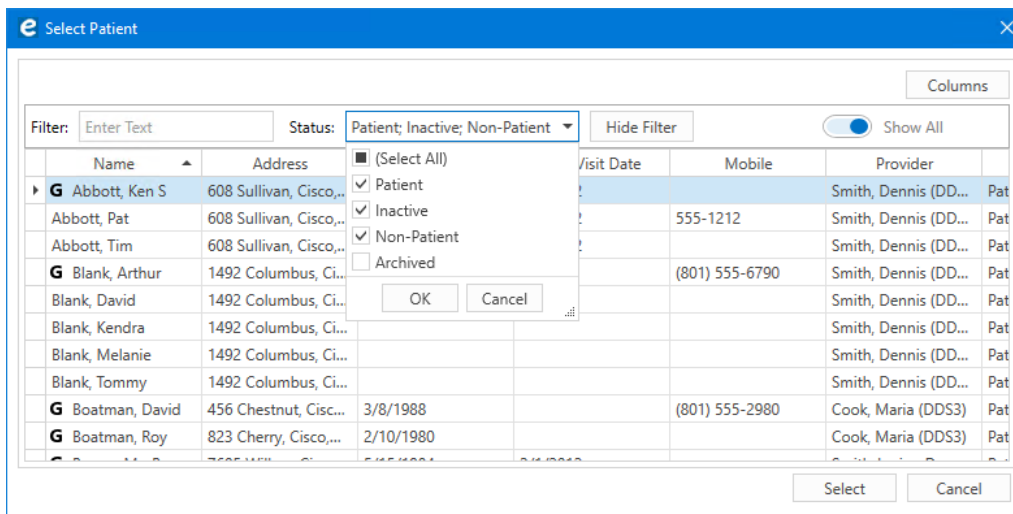


- In the **Filter** text box, type the numbers or letters that you want to filter the list by. The numbers or letters appear in yellow as you type.



- To filter by patient status, click the **Status** list. The **Status** list appears.





- a. Select or clear the items in the list to customize your search, and then click **OK**.

The list reflects the choices you made.

5. Click the patient you searched for, and then click **Select**.

## ASSIGNING INSURANCE TO NEW PATIENTS USING ADVANCED SEARCH

When you create a new patient, you can either assign an existing insurance plan to the patient, or you can add a new insurance plan using Advanced Search in the **Add New Patient** dialog box.

### To assign insurance to a new patient using Advanced Search

1. In the Patient Banner, click the Create New Patient icon, and then click New Family.

The **Add New Patient** dialog box appears.

2. Add the patient's primary provider and first and last names.

3. Type or select any other information that applies to the patient.
4. Under **Primary Dental Insurance**, click the Advanced Search icon.

The **Select Insurance** dialog box appears.

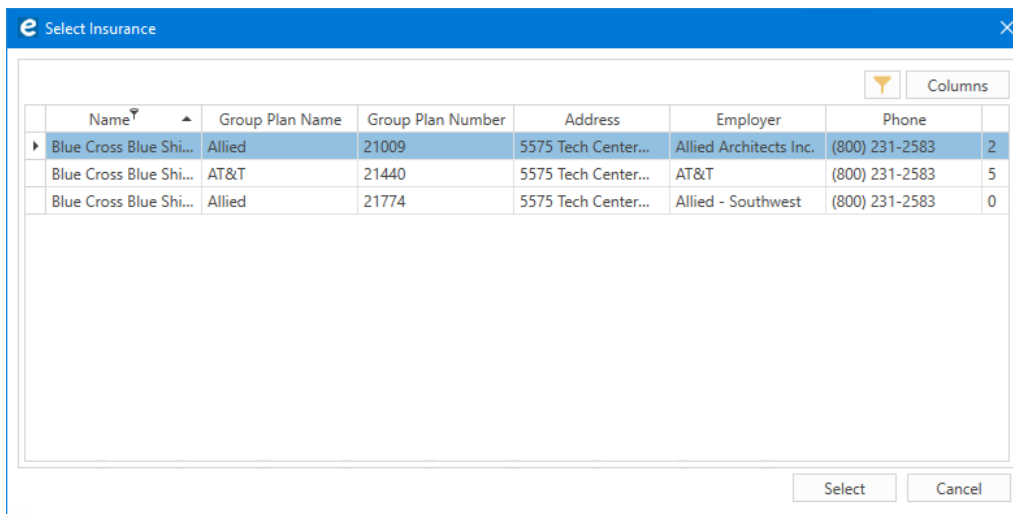
Name	Group Plan Name	Group Plan Number	Address	Employer	Phone	
Blue Cross Blue Shi...	Allied	21774	5575 Tech Center...	Allied - Southwest	(800) 231-2583	0
Blue Cross Blue Shi...	Allied	21009	5575 Tech Center...	Allied Architects Inc.	(800) 231-2583	2
Ameritas	Allied Plumbing	11220	P.O. Box 82520, Lin...	Allied Plumbing	(800) 487-5553	1
Ameritas	American Express	11515	P.O. Box 82520, Lin...	American Express	(800) 487-5553	1
Blue Cross Blue Shi...	AT&T	21440	5575 Tech Center...	AT&T	(800) 231-2583	5
American Western...	Carmike Cinemas	23445	P.O. Box 4999, San...	Carmike Cinemas	(800) 782-9200	1
American Western...	Central City Clinic	41336	P.O. Box 4999, San...	Central City Clinic	(800) 782-9200	1
Metlife	Chevron	87663	P.O. Box 2078, Aur...	Chevron	(708) 820-7550	3
American Western...	Circuit City	98552	P.O. Box 4999, San...	Circuit City	(800) 782-9200	2
Connecticut General	Columbia	65001	P.O. Box 1650, Visa...	Columbia Healthcare	(800) 252-2091	0
Connecticut General	Columbia	55001	P.O. Box 1650, Visa...	Columbia Industries	(800) 252-2091	2
Aetna	Consumer Advocat...	01278	P.O. Box 706, Wind...	Consumer Advocat...	(203) 298-4000	1

5. To filter the **Select Insurance** dialog box by a single column, hover your mouse pointer over the column name, and then click the Filter data icon.

A list similar to the following appears:

- (Blanks)
- (Non blanks)
- Aetna
- American Western Life
- Ameritas
- Blue Cross Blue Shield
- Connecticut General
- Delta Dental Plan
- Dental Select
- Equicor Cigna
- Guardian
- Lincoln National
- Metlife
- Principal Financial Group
- Prudential

6. Click the item in the list that you want to filter the list by.  
Any matches for the item you chose to filter by appears in the **Select Insurance** dialog box.



7. Select the plan you want to assign to the patient, and then click **Select**.

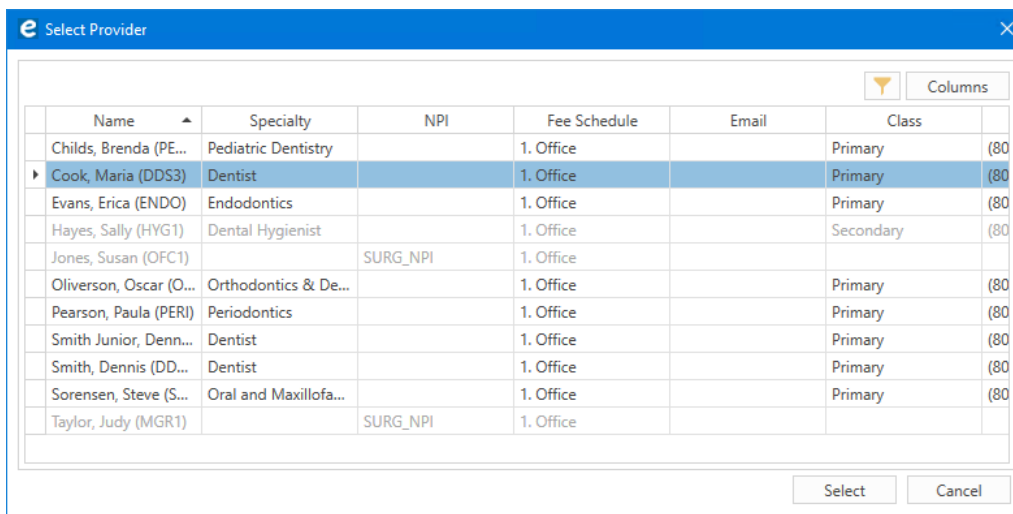
### USING THE COLUMN CHOOSER

You can customize each of the dialog boxes that were added to Easy Dental 12.5 Update 3 by choosing which columns appear in them.

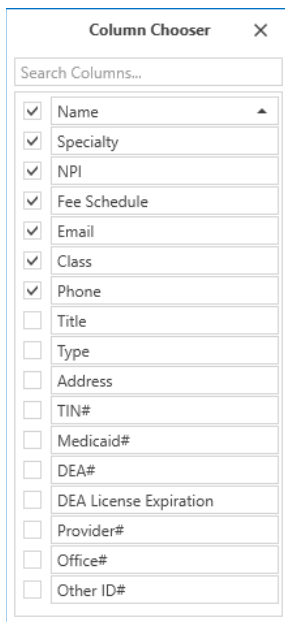
To use the Column Chooser to customize the Select Provider dialog box

1. Assign a provider to a new patient, or assign a new provider to an existing patient.

The **Select Provider** dialog box appears.



2. Click the **Columns** button.  
The **Column Chooser** appears.



3. Do the following:
  - Clear a check box to remove a column from the dialog box.
  - Select a check box to add a column to the dialog box.
4. Close the **Column Chooser**.

## Documents

The Documents module was modified so that you can apply document tags using Advanced Search, and you can also click and drag to rearrange the pages of a document.

### ADDING DOCUMENT TAGS USING ADVANCED SEARCH

You can now use Advanced Search to add a document tag (patient, provider, insurance provider, employer, or referral to or by) to a document.

#### To add a document tag using Advanced Search

1. In the Document Tree, double-click the document that you want to add a document tag to.  
The **Edit Document Information** dialog box appears.

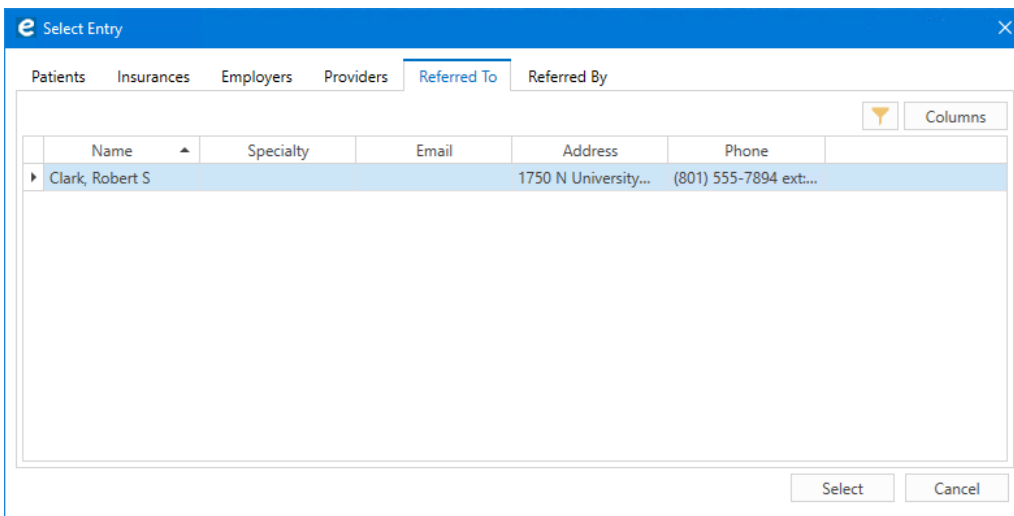
2. Click Add Tag.

The **Select Entry** dialog box appears.

Name	Address	Birth Date	Last Visit Date	Mobile	Provider
G Abbott, Ken S	608 Sullivan, Cisco,...	3/2/1975	1/2/2012		Smith, Dennis (DD... Pat
Abbott, Pat	608 Sullivan, Cisco,...	9/28/1977	1/2/2012	555-1212	Smith, Dennis (DD... Pat
Abbott, Tim	608 Sullivan, Cisco,...	12/15/2006	1/2/2012		Smith, Dennis (DD... Pat
G Blank, Arthur	1492 Columbus, Ci...	3/6/1975		(801) 555-6790	Smith, Dennis (DD... Pat
Blank, David	1492 Columbus, Ci...				Smith, Dennis (DD... Pat
Blank, Kendra	1492 Columbus, Ci...				Smith, Dennis (DD... Pat
Blank, Melanie	1492 Columbus, Ci...				Smith, Dennis (DD... Pat
Blank, Tommy	1492 Columbus, Ci...				Smith, Dennis (DD... Pat
G Boatman, David	456 Chestnut, Cisc...	3/8/1988		(801) 555-2980	Cook, Maria (DDS3) Pat
G Boatman, Roy	823 Cherry, Cisco,...	2/10/1980			Cook, Maria (DDS3) Pat
G Brown, Ms. Brown	7605 Willow, Cisco,...	5/15/1984	2/1/2012		Smith Junior, Denn... Pat

3. Click the tab corresponding to the type of document tag you want to apply.

**Note:** If necessary, you can filter the entire contents of the **Select Entry** dialog box, or you can filter each column individually. You can also use the Column Chooser to select which columns appear.



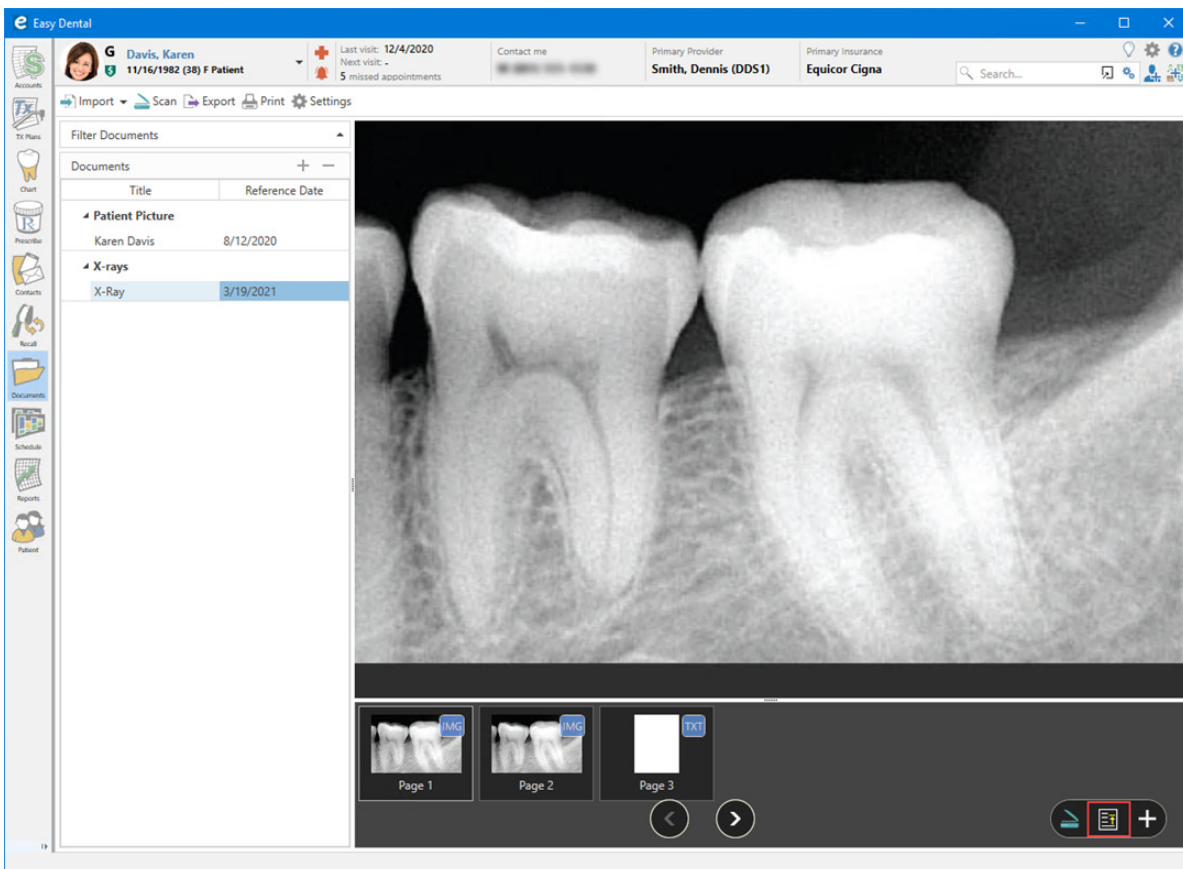
- In the list, select the entry you want, and then click **Select**.  
The selected document tag appears in the **Edit Documentation Information** dialog box.
- Click **OK**.

### CHANGING PAGE ORDER IN DOCUMENTS

You can easily change the page order in multi-page documents.

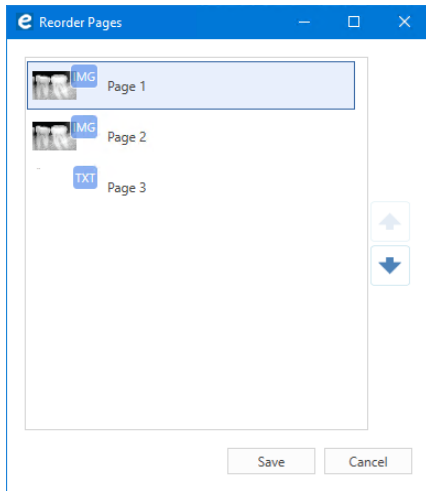
#### To change the page order of a document

- In the Document Tree, click the document that you want to change the page order of.  
The document appears in the Document Viewer.



2. Click the Change pages order in selected document icon.

The **Reorder Pages** dialog box appears.



3. To reorder the pages, do one of the following:
  - Click the page that you want to move, and then click the Move Page Up or Move Page Down icon until the page is in the desired position.
  - Click the page that you want to move, and then drag it into the desired position.
4. Click **Save**.

## Easy Dental 12.5 Update 3 Software Changes and Fixes

The following list contains descriptions of the changes and fixes included in Easy Dental 12.5 Update 3:

### ACCOUNTS

- The insurance type (**Pr** for primary; **Sc** for secondary) now appears in the **Description** column when insurance payments are entered.
- If desired, you can now clear benefits used when you're editing a subscriber's insurance.
- The Last Statement was not updated when single billing statements were printed. This has been fixed.
- The Account Details pane was cut off when the Accounts window was re-sized. This has been fixed.
- Insurance Payor IDs were not being entered correctly. This has been fixed.

### PATIENTS

- In the **Patient Info** pane, you can now use a drop-down list to set the relationship of a new family member to the insurance subscriber.
- You can now add chart numbers automatically when you create new patients.
- You can now add and edit employers.

- The primary provider setting was not being used correctly when a new family was created. This has been fixed.
- Secondary provider information was not filled in correctly when family members were added to existing guarantors. This has been fixed.

## REPORTS

- The **Print Preview** dialog box remained open when you switched modules or previewed the same report again. This has been fixed.



# **Easy Dental 12.5 Update 2**

# Overview and New Features

This Easy Dental 12.5 Update 2 Release Guide provides information about the Easy Dental 12.5 Update 2 software release. This overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Easy Dental 12.5 Update 2.

**Note:** For information about using the new features in Easy Dental 12.5 Update 2, refer to “Using the New Features and Changes” in this section of the Release Guide or “What’s New in Easy Dental 12.5 Update 2?” in the Easy Dental Help.

## New Features and Changes

Easy Dental 12.5 Update 2 includes the following new features and enhancements:

### PATIENTS

New controls were added to the **Contact Information** pane. You can use these new controls to do the following:

- Select a single preferred contact option for each patient.
- Set one or more contact options to “Do not contact.”
- Set all contact options to “Do not contact” simultaneously.

#### Notes:

- Patients under the age of 18 will still show their guardian’s contact information.
- Phone numbers set to “Do not contact” are disabled in the **Auto Dial** dialog box.
- You can select a new patient’s preferred contact option when you create the patient.

### MISCELLANEOUS

A patient’s preferred and do not contact options will appear in the following patient reports:

- Aging – Home number
- Patient Balance – Home and work numbers
- Patient Notes – Home and work numbers
- Inactive Patient List – Home and work numbers
- Archived Patient List – Home and work numbers
- Routing Slip – Home and work numbers
- New Patient List – None
- Unscheduled Treatment Plans – Home number
- Unscheduled Appointment List – Home number
- Truth in Lending (printed Accounts/Payment Plan) – Home number
- Payment Plan Coupon Book (printed Accounts/Payment Plan) – Home number
- Patient Progress Notes – Provider’s number
- Future Due Payment Plan – Home number
- Patient Visit Form – All contact options

Preferred contact options appear in the following:

- Patient Banner
- Recall List

- Treatment Manager
- Collections Manager
- Lab Case Manager
- Contacts
- Hover window
- Schedule Appointment blocks

## Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release.

### Patients

The Patients module was modified to make contacting your patients quickly and easily to communicate reminders, follow up on treatment, and send personal greetings to help you grow and maintain your practice. However, patients often have numerous communications options available to them, and keeping track of these methods can be cumbersome and impractical if, for instance, you're not sure which option each patient prefers.

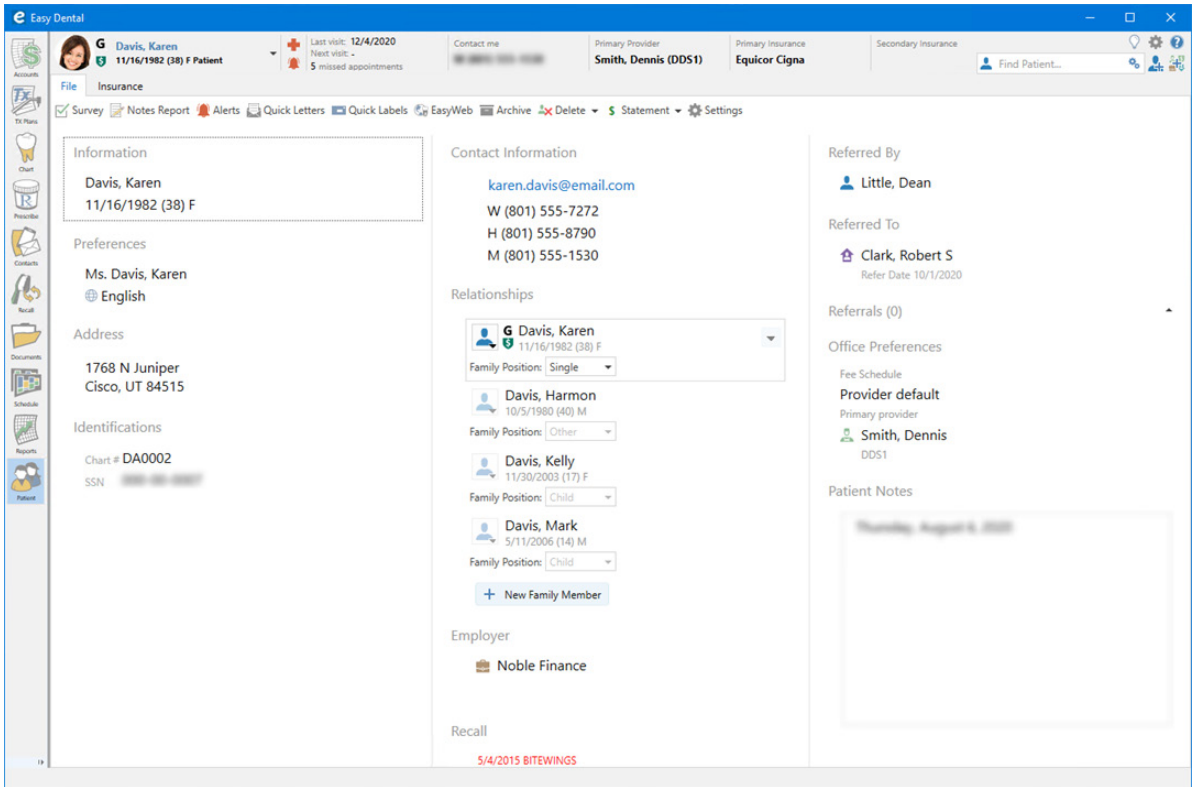
#### SETTING CONTACT INFORMATION OPTIONS

You can now set each patient's preferred communication option so that you know at a glance how best to contact a selected patient. You can also set a "do not contact" option.

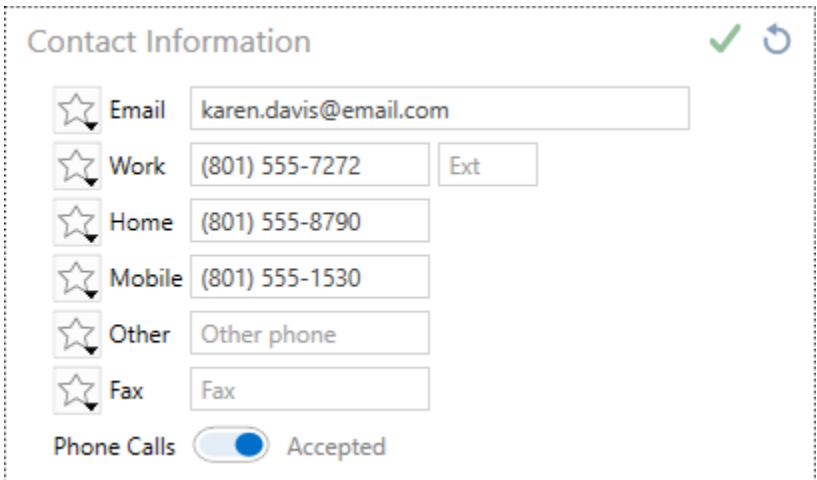
**Note:** The preferred contact option also appears in the following: Patient Banner, Recall List, Treatment Manager, Collection Manager, Lab Case Manager, Contacts, the Hover window, and Schedule appointment blocks. Any numbers set to **Do not contact** are disabled in the **Auto Dial** dialog box.

#### To set a Contact Information option

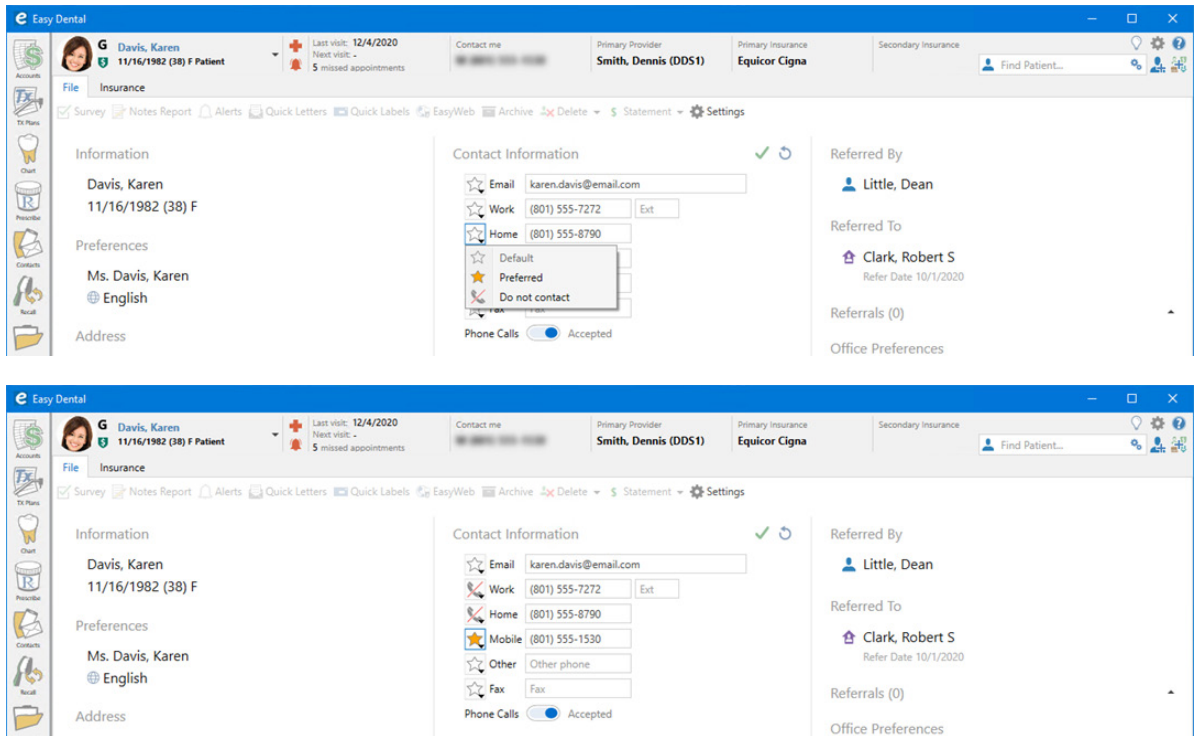
1. Open the Patients module, and select a patient.  
The selected patient's information appears in the Patients window.



- Click **Contact Information** and the Click to edit icon (only visible after you hover your cursor over or click the **Contact Information** pane).  
The **Contact Information** pane expands.



- Click the Star icon adjacent to the desired contact method, and then click the appropriate option.  
The options list appears and the desired option is set.



4. Click the Save Changes icon (green check mark).

**Note:** You can also set all phone calls from the default setting **Accepted** to **Do not contact** by clicking the **Phone Calls** slider.

## ADDING NEW PATIENTS

You can set contact information options when you add new patients.

**Important:** You can set only one contact information option to **Preferred**.

To add a new patient

1. In the Patient Banner, click the Create New Patient icon, and then click New Family.  
The Add New Patient dialog box appears.

2. Add the patient's primary provider and first and last names.
3. Type or select the following information in the appropriate text boxes or lists respectively:
  - **Family Position** – Select one of the following options: **Single, Married, Child, Other**.
  - **Office Relationship** – Select the patient's relationship to your practice from the list (**Patient, Non-Patient, or Inactive**).
  - **Birthdate** – Type the patient's birth date or click the calendar button, and then select the birth date from the calendar. The patient's age is computed automatically.
  - **Gender** – Select the patient's gender from the list.
  - **Street Address** – Type the patient's street address.
  - **Social Security Number** – Type the patient's Social Security number.
  - **Driver's License Number** – Type the patient's driver's license number.
  - **City, State, ZIP** – Type the patient's ZIP Code, and then select the City, State, and ZIP code from the list, or click the add button to add a new city and ZIP code.
  - **Email** – Type the patient's email address.
 


**Note:** Click the Star icon to set the patient's email address as the preferred contact option.
  - **Mobile** – Type the patient's mobile phone number.
 

**Note:** Click the Star icon to set the patient's mobile phone number as the preferred contact option. Click the telephone Receiver icon to add the patient's other phone numbers.
  - **Phone Calls** – To change the default setting from **Accepted** to **Do not contact**, click the slider.
4. Add the patient's Primary Dental Insurance.
5. Do one of the following:
  - **Save** – Click to save the patient's information.
  - **Save & Create Appointment** – Click to save the patient's information and create an initial appointment.

## Hover Window

The Hover Window in the Schedule module was modified to include all of the patient's Contact Information options that you have set.

**Ms. Davis, Karen**



11/16/1982  
38 - Female

CompEx, ProphyAd  
02/10/2021  
3:00pm - 4:00pm  
DDS1 - Dennis Smith  
OP-2 -  
Amount: 165.00  
Type: General  
Schedule: FIXED  
Status: <none>

Home Phone: [Do not contact]  
Work Phone: [Do not contact]  
Mobile Phone: [P] (801) 555-1530  
Other Phone: [Not set]  
E-Mail: karen.davis@email.com

Chart #: DA0002  
SSN: 000-00-0007  
Referred By: Little, Dean  
Insurance Plan: Equicor Cigna  
Account Balance: 212.00

Appt Notes:

## Contacts

The Add Contact Entry and Edit Contact Entry dialog boxes were modified to reflect the patient's Contact Information options.

**Add Contact Entry - Davis, Karen**

Type

Prov/Staff  
 >>

Description

Note

Date (mm/dd/yyyy)

Time (hh:mm:ss)

Auto Dial

Work: [Do not contact]

Home: [Do not contact]

Mobile: [P] (801) 555-1530

Other:

Fax:

**Edit Contact Entry - Davis, Karen**

Type: Phone Call | Date (mm/dd/yyyy): 02/12/2021

Prov/Staff: DDS1 | Time (hh:mm:ss): 1:07:50 PM

Description: Reminder

Note: Called to remind of appointment.

**Auto Dial**

- Work: [Do not contact]
- Home: [Do not contact]
- Mobile: [P] (801) 555-1530
- Other:
- Fax:

[OK] [Cancel]

## Auto Dial Dialog Box

The **Auto Dial** dialog box was modified to reflect the patient's Contact Information options. The **Auto Dial** dialog box is available in several Easy Dental modules including the Treatment Manager, Collections Manager, and Schedule.

**Auto Dial - Little, Dean**

Contact Entry

Type: Phone | Date: 02/12/2021

Prov/Staff: DDS2 | Time: 01:21:06 pm

Description: Lab Case Manager Call

Note: Called:

**Auto Dial**

- Work:
- Home: [Do not contact]
- Mobile: [P] (801) 555-5435
- Other:
- FAX:

[OK] [Cancel]

## Easy Dental 12.5 Update 2 Software Changes and Fixes

The following list contains descriptions of the fixes included in Easy Dental 12.5 Update 2:

### ACCOUNTS & TREATMENT PLANS

- A warning message did not appear if a procedure code format was incorrect. This has been fixed.

### DOCUMENTS

- Scanned or imported images were not being centered correctly. This has been fixed.



- 
- Imported documents remained in a temporary folder after being converted from a previous version. This has been fixed.
  - Temporary files were not being removed as they were converted during document conversions. This has been fixed.

### **PATIENTS**

- Quick Letters only generated for the selected patient. This has been fixed.

### **SCHEDULE**

- When an inactivated provider was reactivated, the provider colors did not appear correctly. This has been fixed.

### **MISCELLANEOUS**

- The CAMED3 claim format pulled the incorrect procedure fee for patients' default fee schedule. This has been fixed.
- A conflict occurred when Insurance Payor IDs were changed. This has been fixed.
- The Trojan Viewer displayed an error message when the database was updated. This has been fixed.



# **Easy Dental 12.5 Update 1**

# Overview and New Features

This Easy Dental 12.5 Update 1 Release Guide provides information about the Easy Dental 12.5 Update 1 software release. This overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Easy Dental 12.5 Update 1.

**Note:** For information about using the new features in Easy Dental 12.5 Update 1, refer to “Using the New Features and Changes” in this section of the Release Guide or “What’s New in Easy Dental 12.5 Update 1?” in the Easy Dental Help.

## New Features and Changes

Easy Dental 12.5 Update 1 includes the following new features and enhancements:

### PATIENTS

- The icons in the Patients module now change based on patient status.
- You can now browse referred to or referred by entries in settings or patient info.
- You can now archive or reactivate patients in the **Relationships** tile.
- Archived patients now appear in the **Relationships** tile.
- The **Office Relationship** list was removed from the **Office Preferences** tile.

### PATIENT BANNER

- The patient status indicator is more noticeable.
- The Guarantor icon is more visible.
- An Insurance Subscriber icon was added.

### QUICK SEARCH

- Quick Search was updated with new patient status icons.

## Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release.

### Patients

The Patients module was modified to make archiving patients and changing family status in the **Relationships** tile more intuitive. Icons were also enhanced and added, so you can quickly determine whether a family member is archived, the account guarantor and/or an insurance subscriber. You can also quickly change a family member’s position or move a family member to a new or existing family in the **Relationships** tile.

The screenshot displays the Easy Dental patient record for Karen Davis. The interface is organized into several sections:

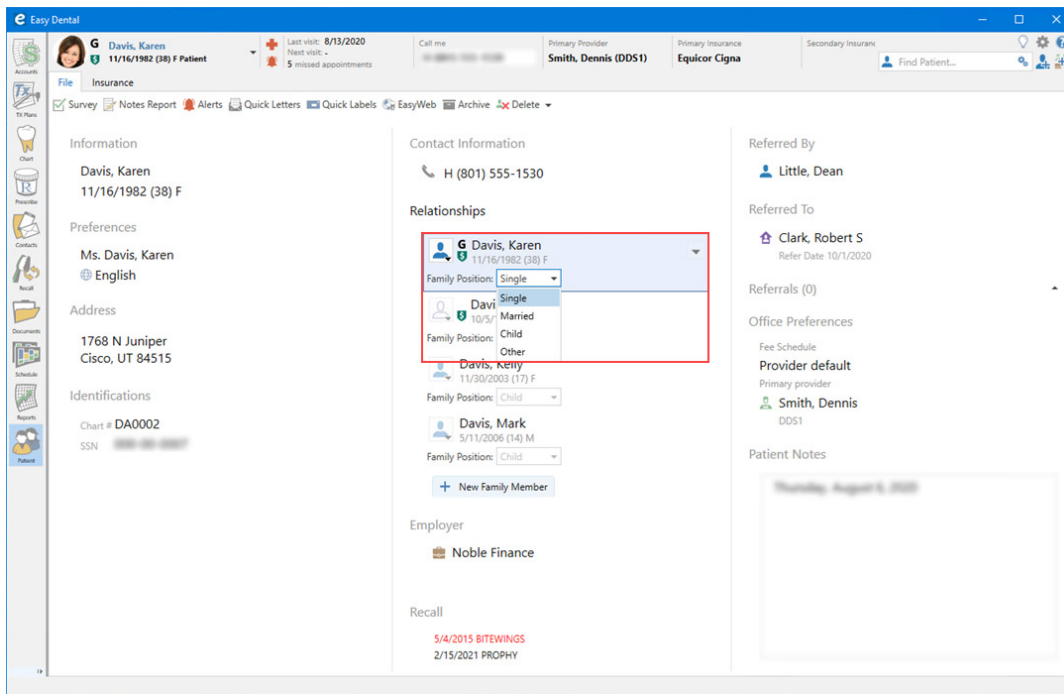
- Header:** Patient name (Davis, Karen), birth date (11/16/1982), gender (F), last visit (12/4/2020), next visit, missed appointments (5), primary provider (Smith, Dennis), and primary insurance (Equicor Cigna).
- Navigation:** File, Insurance, Survey, Notes Report, Alerts, Quick Letters, Quick Labels, EasyWeb, Archive, Delete.
- Information:** Patient name (Davis, Karen), birth date (11/16/1982), gender (F).
- Preferences:** Ms. Davis, Karen; English.
- Address:** 1768 N Juniper, Cisco, UT 84515.
- Identifications:** Chart # DA0002, SSN (blurred).
- Contact Information:** H (801) 555-1530.
- Relationships:**
  - G Davis, Karen:** 11/16/1982 (38) F, Family Position: Single
  - Davis, Harmon:** 10/5/1980 (40) M, Family Position: Other
  - Davis, Kelly:** 11/30/2003 (17) F, Family Position: Child
  - Davis, Mark:** 5/11/2006 (14) M, Family Position: Child
- Employer:** Noble Finance
- Recall:** 5/4/2015 BITEWINGS, 2/15/2021 PROPHY
- Referred By:** Little, Dean
- Referred To:** Clark, Robert S (Refer Date 10/1/2020)
- Referrals (0):**
- Office Preferences:** Fee Schedule, Provider default (Primary provider: Smith, Dennis DDS1)
- Patient Notes:** Placeholder for notes (Thursday, August 6, 2020).

## CHANGING FAMILY POSITIONS

Family dynamics can change over time through marriage, divorce, or death, for example. In Easy Dental, you can easily record these changes in the **Relationships** tile in the Patients module.

### To change a family position

1. Open the Patients module, and select a patient.
2. In the **Relationships** tile, click the patient whose family position you want to change.



3. In the **Family Position** list, click the patient's new position: **Single, Married, Child, or Other**. The change is saved.

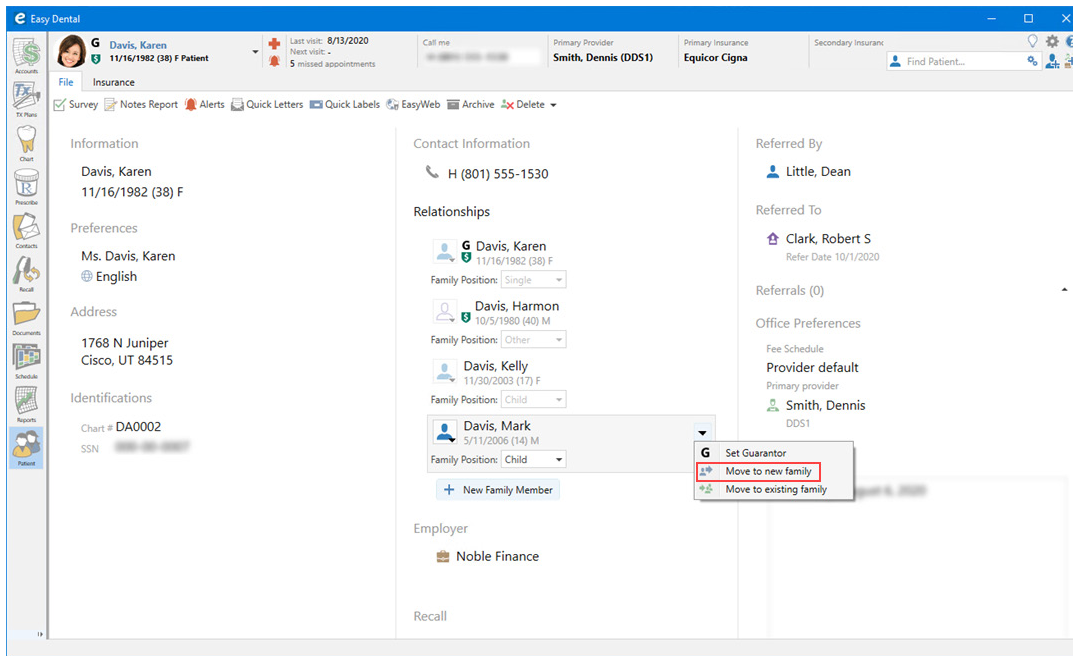
## MOVING PATIENTS TO A NEW FAMILY

You can now move a patient to a new family/account in the **Relationships** tile. Consider the following information before moving any patients:

- You cannot move patients if they have any outstanding insurance claims. You can wait until the claim is paid or delete the claim and recreate it under the new account.
- When you move a patient, the patient's insurance information is cleared if the patient is not the guarantor. If the patient is the guarantor, the insurance is moved too.
- If a patient is the insurance guarantor for family members, the insurance information is cleared for those family members if you move the guarantor.

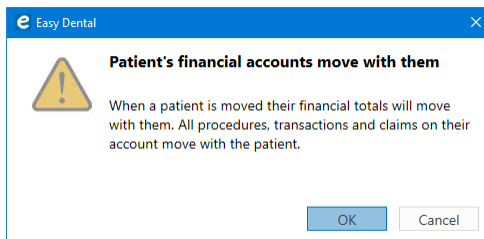
### To move a patient to a new family

1. In the Patients module, click the patient you want to move to another family, and then click the Manage Family icon.



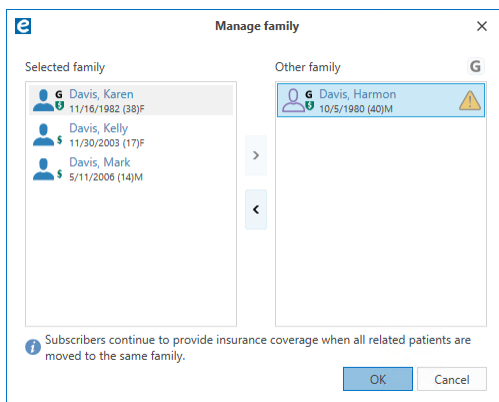
2. Click Move to new family.

The following message appears.



3. Click OK.

The Manage family dialog box appears.



4. Under **Selected family**, select the family member that you are moving, and then click the arrow pointing to **Other family**.

The selected family member, moves to the **Other family** list.

5. Click OK.

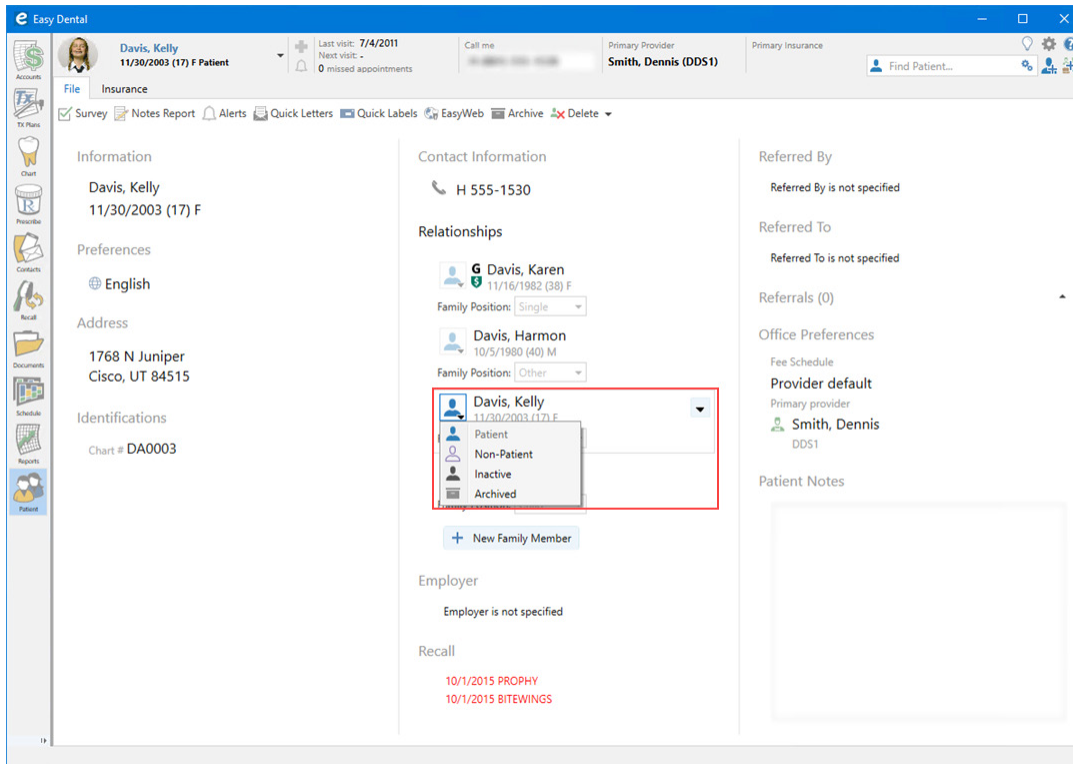
## CHANGING A PATIENT'S RELATIONSHIP WITH YOUR OFFICE

You can now set a patient's relationship with your office (Patient, Non-Patient, Inactive, Archived) in the Relationships tile.

### To change a patient's relationship with your office

1. Open the Patients module, and using Quick Search, select the patient whose relationship with your office you want to change.

The selected patient appears in the Patient Banner and the Patients module.



2. Click the Office Relationship icon to the left of the patient's name, and then select one of the following enabled options:
  - Patient
  - Non-Patient
  - Inactive
  - Archived

The change is saved immediately.

## ARCHIVING PATIENTS USING THE RELATIONSHIPS TILE

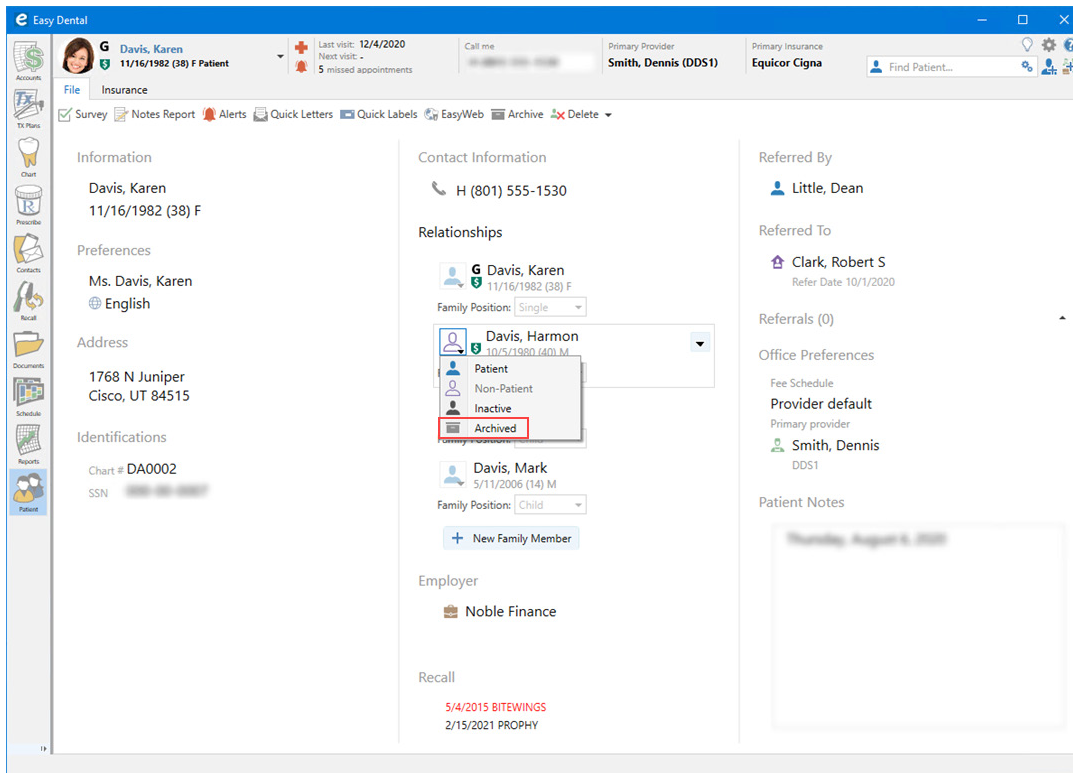
Archiving patients simplifies your patient database and makes patient selection faster and easier. You can now archive patients through the **Relationships** tile. Exceptions to patient archival have not changed. For more information, please refer to "Archiving patients" in the Easy Dental Help.

### To archive a patient

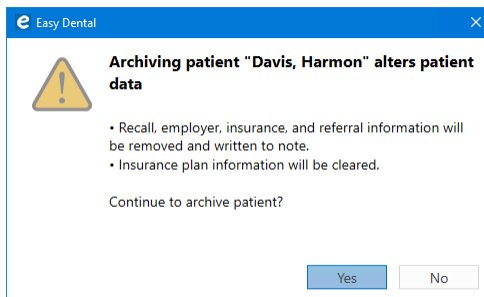
1. Open the Patients module, and using Quick Search, select the patient that you want to archive.

The selected patient appears in the Patient Banner and the Patients module.

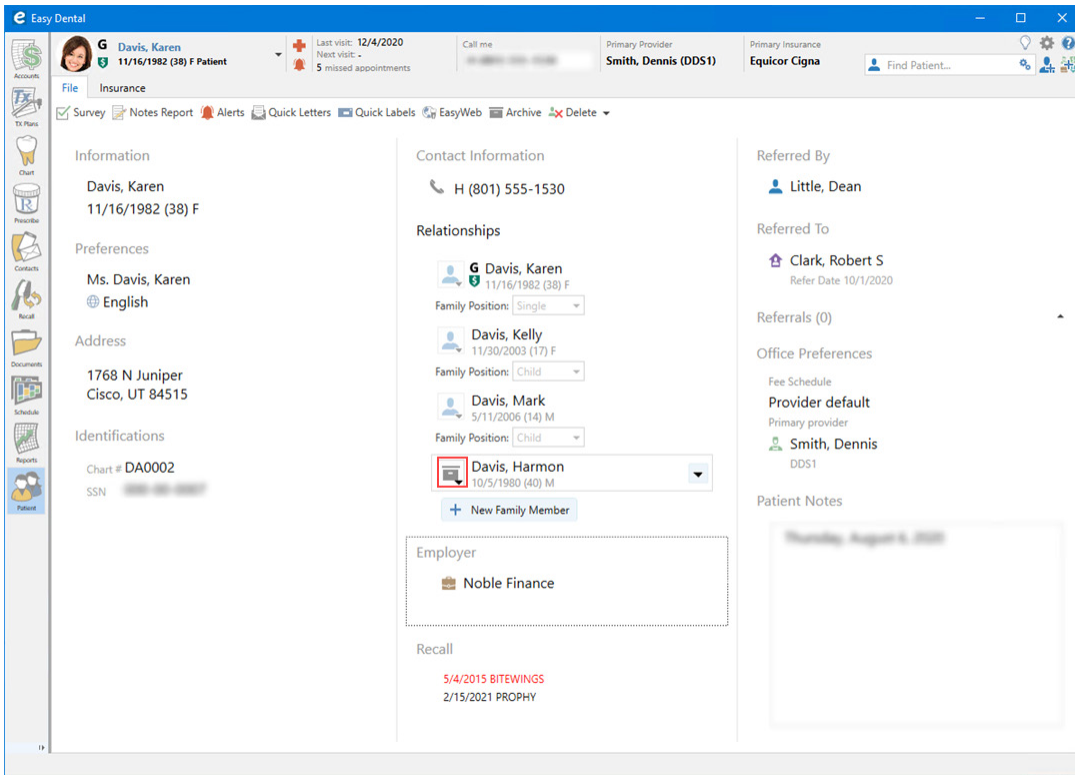




- In the **Relationships** tile, click the icon to the left of the of the patient's name, and then click **Archived**. The following message appears.



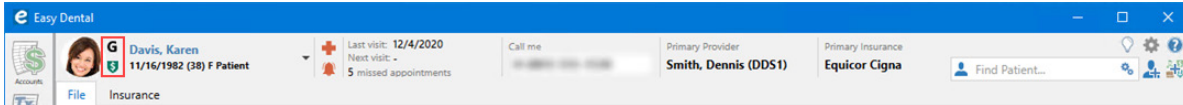
- Click **Yes**. The patient is archived, and the Archived icon appears to the left of the patient's name.



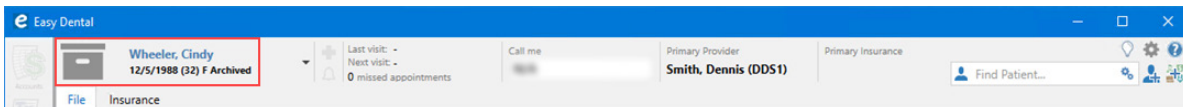
3. To re-activate the patient, click the Archived icon, and then click Patient.

## Patient Banner

The Patient Banner was modified to now include the Archived and Insurance Subscriber icons. The Guarantor icon was modified to make it more visible.



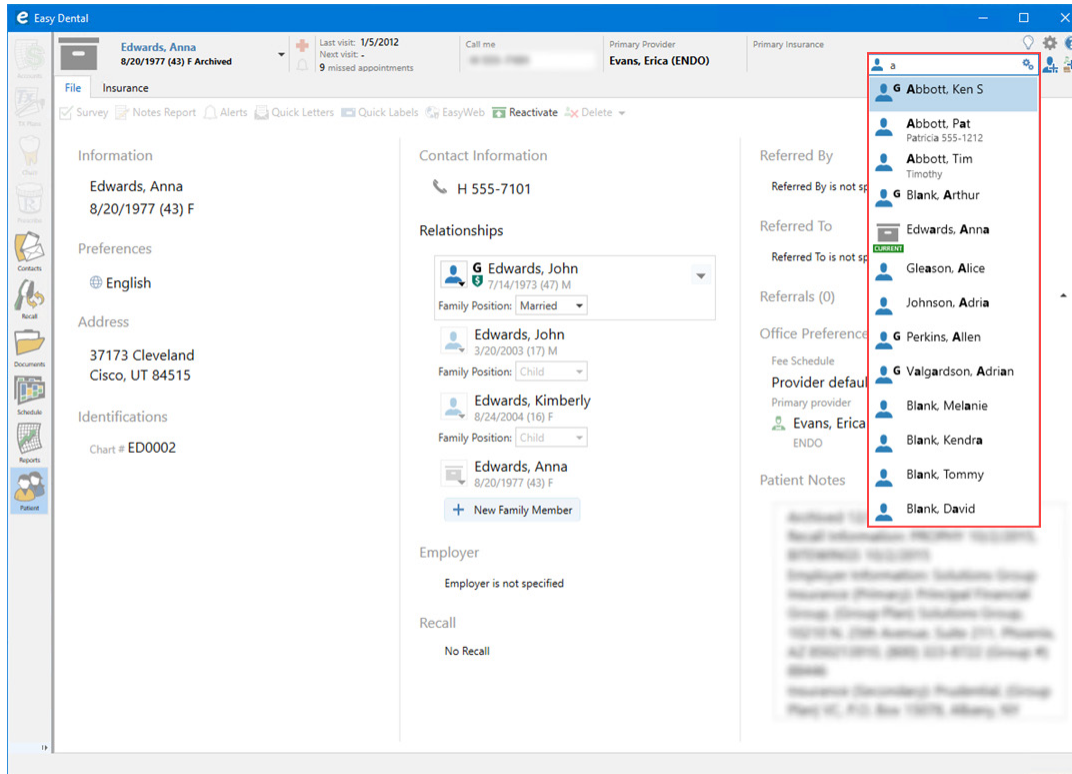
The Guarantor and Insurance Subscriber icons appear between the patient's photo and name and information.



The Archived Patient icon appears to the left of the patient's name and information.

## Quick Search

Patient status icons now appear in the Quick Search list to the left of the patient's name. These icons include: Archived, Guarantor, and Current.



## Easy Dental 12.5 Update 1 Software Changes and Fixes

The following list contains descriptions of the fixes included in Easy Dental 12.5 Update 1:

### ACCOUNTS & TREATMENT PLANS

- In Accounts, creating a claim with a new format using ICD-9 codes opened the previous claim. This has been fixed.
- In Accounts, the Include History Transaction settings were not being retained. This has been fixed.
- In Accounts and Treatment Plans, the Guarantor icon is more visible.

### PATIENTS

- In the Insurance tab, secondary insurance claim procedures did not appear for the applicable insurance. This has been fixed.
- Benefits used amounts were not cleared when insurance carriers were changed. This has been fixed.
- Benefits used amounts were incorrect after primary and secondary insurances were joined. This has been fixed.

### SCHEDULE

- A new patient could not be created by double-clicking an appointment block. This has been fixed.



## **Easy Dental 12.5**

# Overview and New Features

This Easy Dental 12.5 Release Guide provides information about the Easy Dental 12.5 software release. This overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Easy Dental 12.5.

**Note:** For information about using the new features in Easy Dental 12.5, refer to “Using the New Features and Changes” in this section of the Release Guide or “What’s New in Easy Dental 12.5?” in the Easy Dental Help.

## New Features and Changes

Easy Dental 12.5 includes the following new features and enhancements:

### PATIENTS

- The **Primary** and **Secondary Dental Insurance** tiles now include the **Coverage Table**, **Payment Table**, and **Provider ID Setup** buttons. You can use these buttons to create and maintain coverage and payment tables and provider IDs for those insurance plans that require them instead of, or in addition to, state ID and provider numbers.
- Editing insurance plan information was made easier with the addition of the **Edit insurance plan information** button to the **Primary** and **Secondary Dental Insurance** tiles.
- The **Dental Insurance Plan Information** dialog box was redesigned.
- When you create a new patient, you can now create a new insurance plan for that patient simultaneously. A warning appears if you are potentially creating a duplicate insurance plan.
- You can now use advanced search to expand your search to include all Referred To providers.

### MISCELLANEOUS

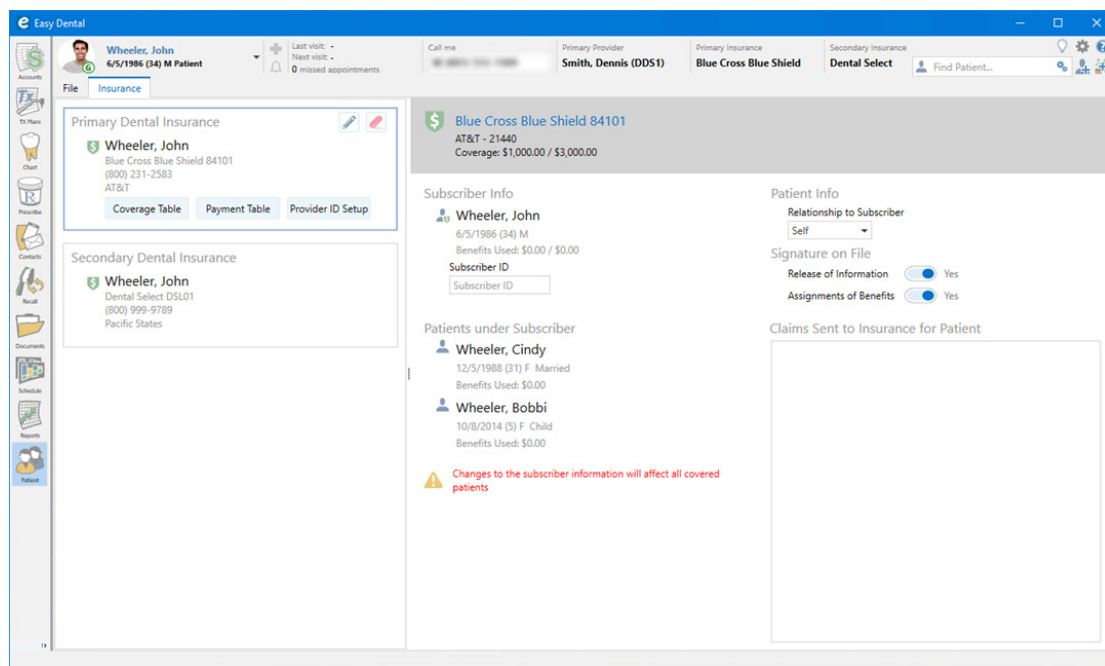
- You can now press Shift + Enter to add procedures, and you can press Enter to post a procedure.

## Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release.

### Patients

The **Insurance** tab was modified to make creating and maintaining coverage tables, payment tables, and provider IDs more intuitive.



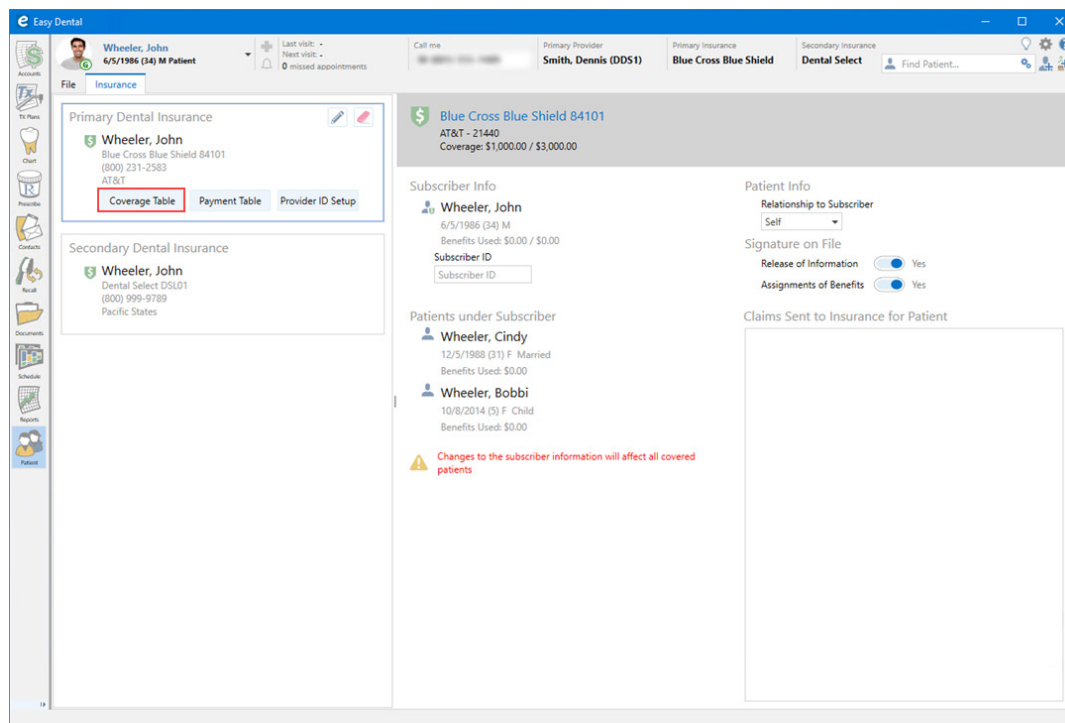
## ADDING COVERAGE TABLES

You can easily add a coverage table using the **Insurance** tab and the **Coverage Table** button.

### To add a coverage table

1. In the Patients window, use Quick Search to select the patient whose insurance carrier you want to add a coverage table to.

The selected patient's information appears.



2. Click the **Insurance** tab, and then click the **Coverage Table** button.

The **Insurance Coverage** dialog box appears.

**Insurance Coverage - (Blue Cross Blue Shield/AT&T)**

**Deductible**

Standard	0	25	75
Preventive	0	0	0
Other	0	0	0

Annual Maximum Benefit: Individual: 1000, Family: 3000

Claim Deadline: >>

**Coverage Table**

Begin Proc	End Proc	Category	Cov%	Deductible	Co Pay	Pre-Est
D0100	D1999	Diag/Preventive	100	Preventive	0.00	N
D0100	D1999	Diag/Preventive	100	Preventive	0.00	N
D2000	D2699	Basic Restor	80	Standard	0.00	N
D2700	D2999	Crowns/Major	50	Standard	0.00	N
D3000	D3999	Endodontics	80	Standard	0.00	N
D4000	D4999	Periodontics	80	Standard	0.00	N
D5000	D5899	Prosth, remov	50	Standard	0.00	N
D5900	D5999	Maxillo, Prosth	50	Standard	0.00	N

Select Category

Co-Payment Calculations for Ins Portion:

- Total Fee x Coverage %
- (Total Fee - Co-Pay) x Cov %
- (Total Fee x Cov %) - Co-Pay

Select Table: >>

Buttons: Add, Change, Delete, Clear Table, Notes, OK, Cancel

3. Under **Deductible**, type the following amounts:

- **Standard** – Applies to most procedures.
- **Preventive** – Applies when a carrier's coverage has a separate deductible for preventive/diagnostic procedures.
- **Other** – Applies when a carrier's coverage has a separate deductible for specific procedures other than preventive/diagnostic or for procedures considered non-standard.
- **Lifetime Individual** – Requires subscribers to pay one deductible for the life of the policy.
- **Annual Individual** – Requires subscribers to pay a deductible each year.
- **Annual Family** – Requires a maximum deductible for the entire family each year.

**Note:** You can assign each range of procedure codes in a coverage table its own deductible type. You can also assign a lifetime, individual, and family deductible to each deductible type.

4. Type the **Annual Maximum Benefit** amounts for **Individual** and **Family**.

5. Click the **Claim Deadline** search button, and then in the **Deadline** dialog box, select the appropriate amount of time before a pre-treatment estimate or an insurance claim expires.

6. Click the **Select Table** search button, and then in the **Select Coverage Table** dialog box, select the coverage table most similar to the current insurance plan.

**Note:** When you add a new insurance plan, the first standard coverage table is assigned to it automatically.

7. In the **Insurance Coverage** dialog box, click **Add**.

## EDITING PAYMENT TABLES

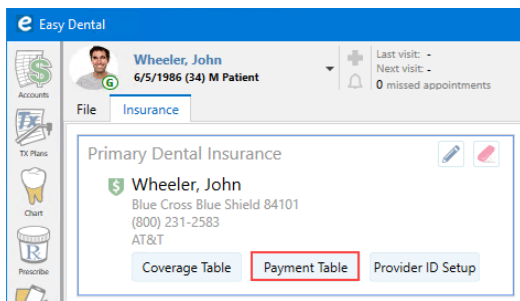
You can set up Easy Dental to automatically update the insurance payment table whenever you receive payments from a carrier. Using this process, you can more easily maintain the accuracy of the table and calculate insurance estimates.

### To edit a payment table

1. In the Patients window, click the **Insurance** tab.

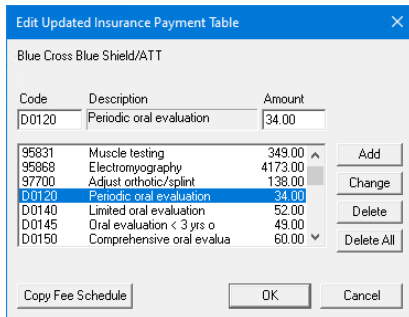
The **Insurance** panel appears.





2. Click the **Payment Table** button.

The **Edit Updated Insurance Payment Table** dialog box appears.



3. Select the procedure code that you want to edit.
4. In the **Code** and **Amount** fields, type the new code and amount respectively.
5. To save your changes, click **Change**.

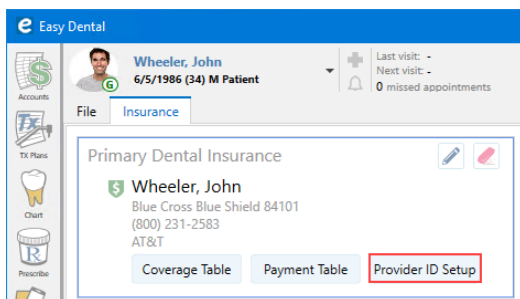
## ADDING PROVIDER IDS

Some Insurance plans have their own provider ID numbers for claims. The new **Provider ID Setup** button makes it easier for you to create and maintain this type of provider ID.

### To add a provider ID

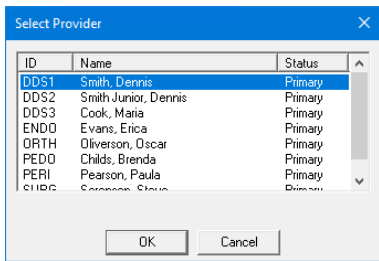
1. In the Patients window, click the Insurance tab.

The **Insurance** panel appears.

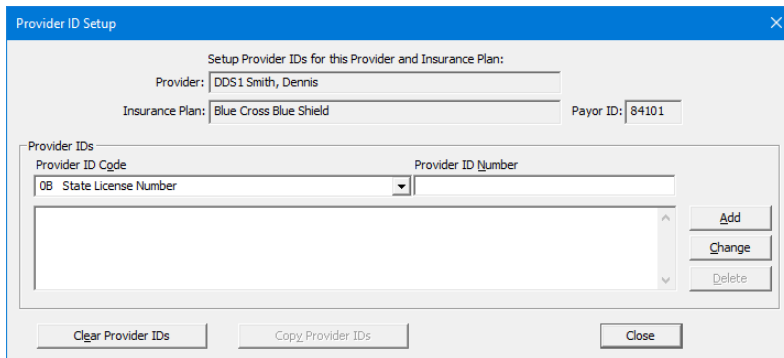


2. Click the **Provider ID Setup** button.

The **Select Provider** dialog box appears.



3. Select the appropriate provider, and then click **OK**.  
The **Provider ID Setup** dialog box appears.



4. From the **Provider ID Code** list, select a provider ID code.
5. In the **Provider ID Number** field, type the provider ID, and then click **Add**.

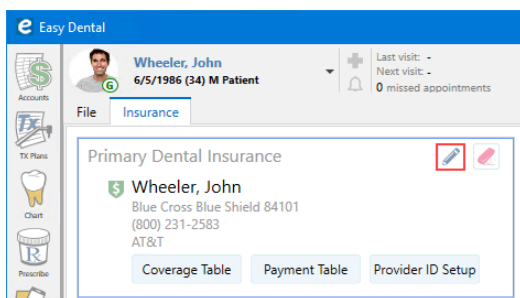
## EDITING INSURANCE CARRIER INFORMATION

If a subscriber's insurance carrier has changed information such as its name, address, and so on, you can just edit the appropriate information rather than clearing the entry entirely and adding the carrier again.

### To edit insurance carrier information

1. In the Patients window, click the **Insurance** tab.

The **Insurance** panel appears.

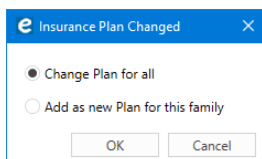


2. Click the **Primary** or **Secondary Dental Insurance** panel, and then click the **Edit insurance plan information** button.

One of the following dialog boxes appears.

Primary Dental Insurance				Secondary Dental Insurance			
Carrier Name *	Group Plan Name *			Carrier Name *	Group Plan Name *		
Equicor Cigna	Noble			Dental Select	Pacific States		
Employer *	Street			Employer *	Street		
Noble Finance	P.O. Box 10367			Pacific States	5373 S. Green Street		
Group Plan Number *	Street Line 2			Group Plan Number *	Ste. 400		
18550	City, State, Zip			95740	City, State, Zip		
Payer ID	City, State, Zip			Payer ID	City, State, Zip		
{(CIGNA (Connecticut General))	Des Moines, IA 50306-5200			DSL01 (Dental Select)	Salt Lake City, UT 84123-543		
Benefit Renewal	National Plan ID			Benefit Renewal	National Plan ID		
January	National Plan ID			January	National Plan ID		
Claim Format	Alt Code	Local	Last Update	Claim Format	Alt Code	Local	Last Update
ECSFORM	ADA	Local	2/1/2012	ECSFORM	ADA	Local	2/1/2012
Fee Schedule	Source of Payment			Fee Schedule	Source of Payment		
<None>	Commercial Insurance Co.			<None>	Commercial Insurance Co.		
Contact	Phone			Contact	Phone		
Claims Office	(800) 247-9622	Ext		Contact	(800) 999-9789	Ext	
Insurance Claim Options				Insurance Claim Options			
Replace initial character of procedure code	<input type="radio"/> No			Replace initial character of procedure code	<input type="radio"/> No		
Include Dental Diagnostic Codes	<input checked="" type="radio"/> Yes			Include Dental Diagnostic Codes	<input checked="" type="radio"/> Yes		
Include Group Plan Name	<input checked="" type="radio"/> Yes			Include Group Plan Name	<input checked="" type="radio"/> Yes		
Bill to Dental Insurance	<input checked="" type="radio"/> Yes			Bill to Dental Insurance	<input checked="" type="radio"/> Yes		
Print Name for Provider's Signature on Claims	<input type="radio"/> No			Print Name for Provider's Signature on Claims	<input type="radio"/> No		

- Make any changes, and then click the **Save insurance plan changes** button. The **Insurance Plan Changed** dialog box appears.



The dialog box titled "Insurance Plan Changed" has a close button (X) in the top right corner. It contains two radio button options: "Change Plan for all" (which is selected) and "Add as new Plan for this family". At the bottom, there are "OK" and "Cancel" buttons.

- Select one of the following options:
  - Change Plan for All** – Changes the insurance plan information for every subscriber who has this plan.
  - Add as new Plan for this family** – Copies the insurance information and creates a new plan for the family without changing the original plan.
- Click OK.

## Easy Dental 12.5 Software Changes and Fixes

The following list contains descriptions of the fixes included in Easy Dental 12.2 Update 5:

### SCHEDULE

- The Schedule toolbar was partly disabled the first time an appointment was selected. This has been fixed.
- When you created an appointment, the Patient Banner did not show the correct patient. This has been fixed.

### MISCELLANEOUS

- Claim formats 2018F and 2019F were not working as designed. This has been fixed.

- Patients with appointments could not be archived. This has been fixed.
- Month end failed if the **Reset Insurance Benefits** option was selected. This has been fixed.
- Changing recall names caused problems with IBEX syncing. This has been fixed.

## **Easy Dental 12.2**

# Overview and New Features

This Easy Dental 12.2 Release Guide provides information about the Easy Dental 12.2 software release. This overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Easy Dental 12.2.

**Note:** For information about using the new features in Easy Dental 12.2, refer to “Using the New Features and Changes” in this section of the Release Guide or “What’s New in Easy Dental 12.2?” in the Easy Dental Help.

## New Features and Changes

Easy Dental 12.2 includes the following new features and enhancements:

- **Patients** – The Patients module was redesigned to include the Patient Banner and the **File** and **Insurance** tabs. The toolbar has fewer buttons because that functionality has been incorporated in the Patient Panel.
- **Patient Banner** – The design of the Patient Banner was refined and now includes buttons to submit new ideas, create a new family, and create a new entity (insurance, provider, staff, employer, referred by, or referred to).
- **Quick Search** – You can now search for mobile phone numbers using Quick Search, and a button was added to the Quick Search text box that you can use to expand your search to include archived patients and email addresses.
- **Documents** – The Documents module now includes a file import monitoring feature, and the toolbar now includes a **Scan** button.
- **Update Manager** – The Update Manager was improved to check for updates to Easy Dental automatically. A notification appears in the lower right-hand corner of your screen when an update is available to install.
- **Patient Picture** – Patient Picture is now available only from the Patient Banner. You can take pictures using a webcam, digital camera, or other TWAIN device, or you can browse for and select images from local and network folders to import into Patient Picture.

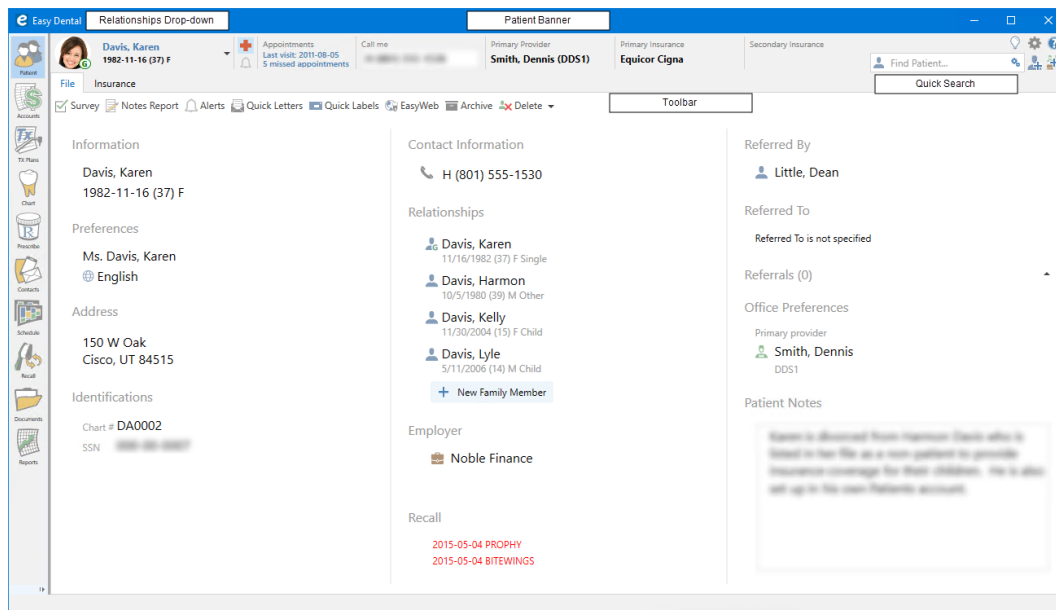
## Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release.

### Patients

The Patients window consists of the following areas:

- **Patient Banner** – You can now use the Patient Banner to submit new ideas for improving Easy Dental, create new families and entities, and acquire patient pictures. Quick Search was enhanced to include searching for mobile phone numbers.
- **File and Insurance tabs** – Click the **File** and **Insurance** tabs to edit a patient’s personal and insurance information in the **File** and **Insurance** panels, respectively.
- **Toolbar** – The toolbar features fewer buttons since many of the features the buttons opened are now available in the Patient Panel.



## EDITING PATIENT INFORMATION

You can edit the information contained in any of the **File** tab's tiles, including adding a new family member.

### To edit a patient's address

1. In the **File** panel, double-click the **Address** tile.

2. Type the corrections to the patient's address.
3. To save your changes, click the green check mark icon, or click another tile.

### To add a new family member

1. In the **Relationships** tile, click **New Family Member**.  
The **New Family Member** dialog box appears.

**New Family Member**

First Name \* MI Last Name \*

Birthdate Age Gender

Street Address

City, State, Zip

Also update to: Karen Davis, Kelly Davis, Lyle Davis

Mobile Mobile phone

Email Email

Office Relationship Patient

Primary provider \* Smith, Dennis DDS1

Save & Create Appointment Save Cancel

2. Type the new family member's information in the required text boxes (first and last names and primary provider).
3. Include any other pertinent information, and then click **Save**.

## EDITING INSURANCE INFORMATION

You can easily make changes to a patient's insurance in the redesigned Patient's module. The Insurance Panel also lists other patients who are covered by the subscriber's policy and any claims that have been sent to the patient's insurance provider.

### To edit a patient's insurance information

1. In the Patient's module, click the **Insurance** tab.

The **Insurance** panel appears.

**Easy Dental**

Davis, Karen 1982-11-16 (37) F

Primary Insurance Equicor Cigna

Secondary Insurance

**Insurance**

Primary Dental Insurance

Davis, Karen Equicor Cigna 62308 (800) 247-9622 Noble

Secondary Dental Insurance (no insurance or subscriber selected)

Subscriber Info

Davis, Karen 1982-11-16 (37) F

Subscriber ID 000-00-0007

Other Patients under Subscriber

Patient Info

Relationship to Subscriber Self

Signature on File

Release of Information Yes

Assignments of Benefits Yes

Claims Sent to Insurance for Patient

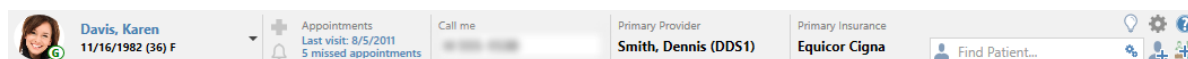
2. Do one or more of the following:
  - **Primary Dental Insurance** – Click the Eraser icon to remove the patient's primary insurance. To select a new insurance provider, type the first letter of the provider's name and select it from the list.








- **Secondary Dental Insurance** – Click the **Secondary Dental Insurance** tile, and then click the Search icon (magnifying glass). In the search text box, type the first letter of the secondary provider's name, and then select it from the list.
- **Coverage Table** – Click the Primary or Secondary Dental Insurance tile, and then click **Coverage Table**. The **Insurance Coverage** dialog box for the selected insurance provider appears. Make any necessary changes, and click **OK**.
- **Payment Table** – Click the Primary or Secondary Dental Insurance tile, and then click **Payment Table**. The **Edit Updated Insurance Payment Table** dialog box for the selected insurance provider appears. Make any necessary changes, and click **OK**.
- **Subscriber Info** – To change the **Subscriber ID**, type the correct ID number in the text box.
- **Patient Info** – To change the relationship to the insurance subscriber, click the Down arrow, and select the appropriate relationship from the list.
- **Signature on File** – To change the settings for **Release of Information** or **Assignments of Benefits**, slide the selection from **Yes** to **No** or **No** to **Yes**.

## The Patient Banner

In addition to the Drop-down View, the Patient Banner was modified to include three new buttons that you can use to submit new ideas for improving Easy Dental and creating new families and entities (insurance and dental providers, office staff, employers, and referrals).



Button	Name	Function
	Submit New Ideas	Click to submit new ideas for new features or changes to Easy Dental.
	Settings	Click to open the <b>Settings</b> dialog box from which you can set up and maintain your practice, set up passwords, and show new tutorials automatically.
	Help	Click to open the Help menu from which you can open the Easy Dental Help; check for, install, and learn about available updates; and connect to the Resource Center.
	Create New Family	Click to open the <b>Add New Patient</b> dialog box from which you can create a new patient and/or family.
	Create New Entity	Click to create new insurance and dental providers, office staff, employers, and referrals.

### To create a new family

1. In the Patient Banner, click the Create New Family button.  
The **Add New Patient** dialog box appears.

2. Type the new patient's information in the required text boxes (first and last names and primary provider).

**Note:** To select a primary provider, type the first letter of the provider's first or last name, and then select the provider from the search list.

3. Do one of the following:
  - **Save & Create Appointment** – Click to save the new patient's information and create an appointment in the Schedule.

**Note:** If the appointment conflicts with a previously scheduled appointment, you will receive a warning message. To resolve the conflict select another time, date, or operator.

- **Save** – Click to save the new patient's information.

The new patient is added to the Easy Dental database, and the Patients module displays the patient's information.

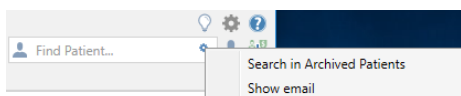
## EXPANDING SEARCHES TO INCLUDE ARCHIVED PATIENTS AND/OR EMAIL ADDRESSES

The Quick Search feature was modified to include an Expand Search button. By clicking this button, you can expand your searches to include archived patients or patients' email addresses.

### To expand a search to include archived archived patients and email addresses

1. In the Quick Search text box, click the Expand Search button.

The Search menu appears.



2. Click one or both of the following:
  - Search in Archived Patients
  - Show email
3. Type the first few letters of a patient's name or email address.
4. To restrict your search parameters to active patients, click the Expand Search button, and then click **Search in Archived Patients** and/or **Show email**.

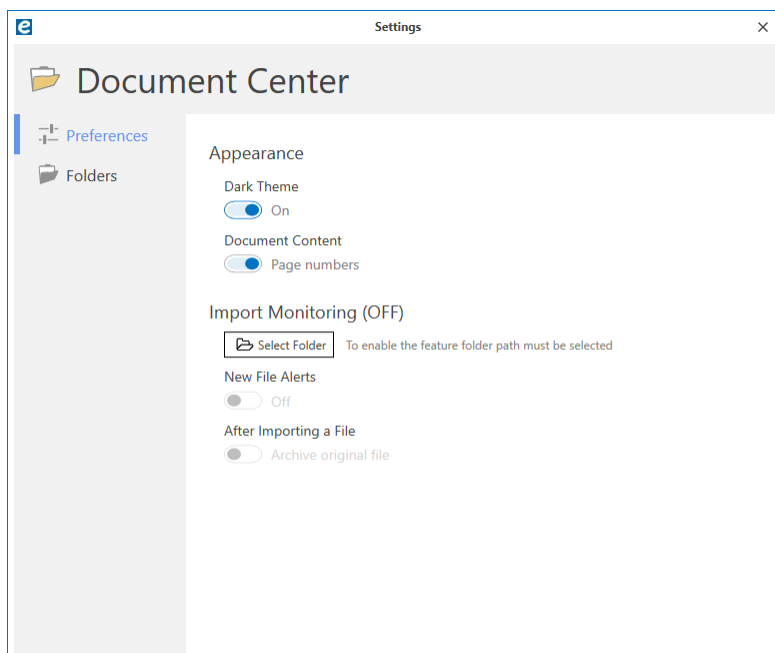
## Documents

The Documents module now includes a file import monitoring feature. Once you have set up file import monitoring, set up your office devices (scanners, diagnostic tools, and so on) to save their files to the file import folder.

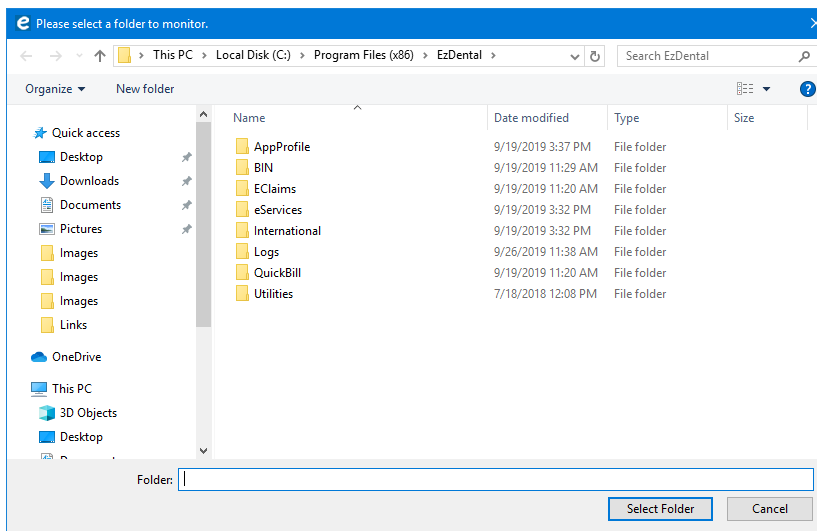
### To set up file import monitoring

1. In the Documents module, click the Settings toolbar button.

The **Settings** dialog box appears.



2. Click **Select Folder**.  
The following window appears.



- To create a folder, click **New Folder**.

**Note:** Depending on the needs of your practice, you can create the folder anywhere on your computer or network.

- Click **Select Folder**.

The path to the folder appears in the **Settings** dialog box, and the status of **Import Monitoring** changes to **ON**.

- To receive an alert when a new file is saved to the monitored folder and/or to archive a file after it has been imported, click the slider button to change the settings to **On** for the following options:
  - **New File Alerts**
  - **After importing a File**

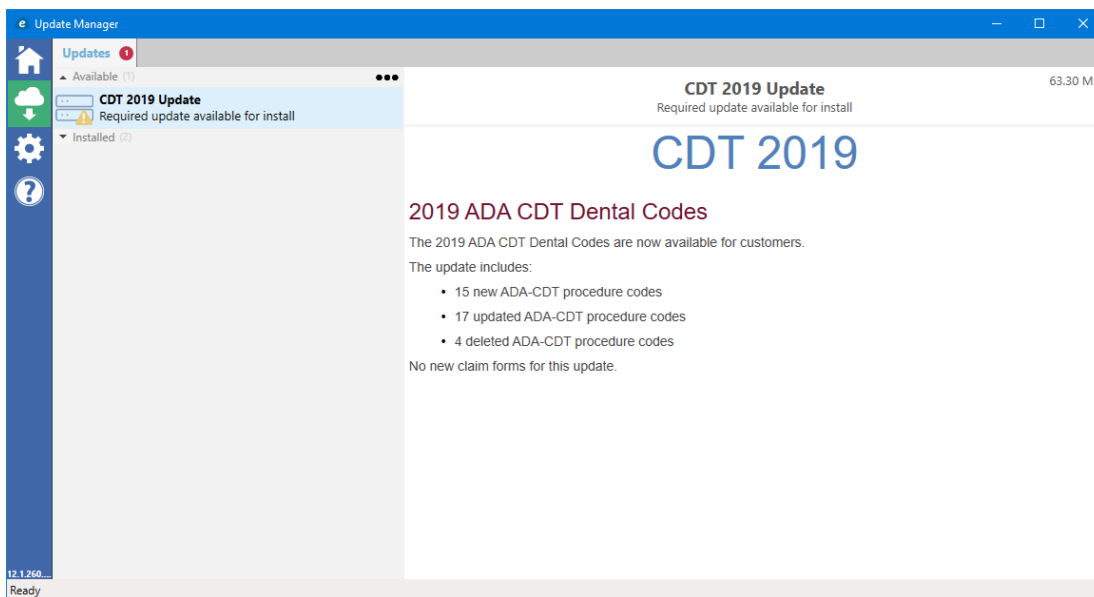
## Update Manager

The Update Manager was improved to check for Easy Dental software updates automatically. A notification appears in the lower right-hand corner of your screen when an update is available to install.

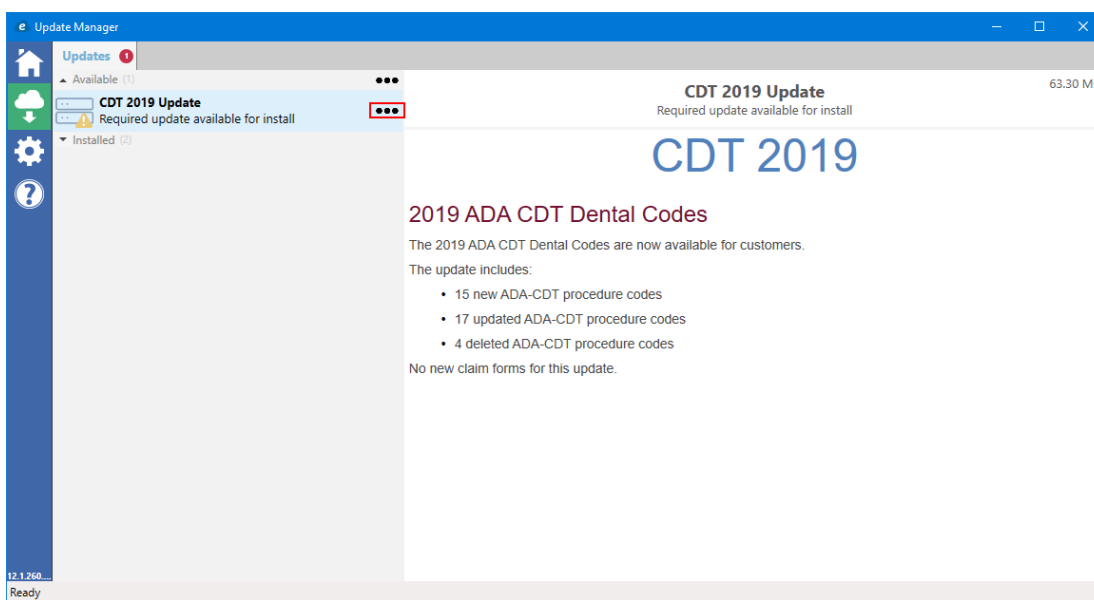
**Note:** While you have access to critical or required updates regardless of Easy Dental Service Bundle status, you can only download and install non-critical updates if your Easy Dental Service Bundle is inactive. If you are not on an active service bundle, please call 1-800-824-6375 to sign up.

### To install an Easy Dental software update

- Click the update notification message in the lower right-hand corner of your screen.  
The Update Manager appears listing all available updates and their descriptions.



2. Hover your mouse pointer over the update that you want to install, download, or suspend. An ellipsis icon appears.



3. Right-click the ellipsis icon, and then in the menu, click one of the following options:
  - **Install** – Downloads and installs the update.
  - **Download** – Downloads the update to the following folder: *EZDental\DATA\Installs*, and the status of the update changes to “staged for install” in the update notification message.
  - **Suspend** – You can suspend the update for a week or a month.

## Patient Picture

Patient Picture is now incorporated into the Patient Banner. To take and/or remove a patient's picture, simply click the Edit Photo icon in the Patient Banner, and then click the appropriate option in the Edit Photo menu.

For more information, see “Patient Picture” in the Easy Dental Help.

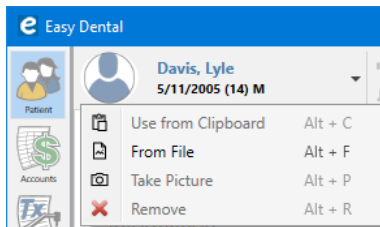
## TAKING PATIENT PICTURES WITH A WEBCAM

To take patient pictures with a webcam, you must first set up your webcam in Microsoft Windows.

### To take a patient's picture using a webcam

1. In the Patient Banner, use Quick Search to select the patient whose picture you want to take.
2. Click the Edit Photo icon.

The Edit Photo menu appears.



3. Click Take Picture.
4. Follow your webcam's procedures for taking a picture.

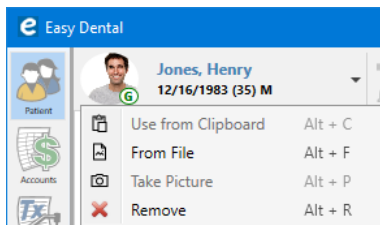
## REMOVING PATIENT PICTURES

Removing a patient's picture is very useful when you need to update a patient's picture.

### To remove a patient's picture

1. In the Patient Banner, use Quick Search to select the patient whose picture you want to remove.
2. Click the Edit Photo icon.

The Edit Photo menu appears.



3. Click Remove.
- The Remove Profile Photo confirmation message appears.
4. To remove the photo, click Yes.

# Easy Dental 12.2 Software Changes and Fixes

The following list contains descriptions of the fixes included in Easy Dental 12.2:

## ACCOUNTS

- After running month end, balance forward amounts changed to initial balances. This has been fixed.
- If you moved a toolbar button to a new position in the toolbar, the new position was not saved. This has been fixed.

---

## CHART

- Unnecessary line breaks were added to Progress Notes between procedure codes. This has been fixed.

## CONTACTS

- Payment types did not match the payment types specified in the Accounts module. This has been fixed.

## DOCUMENTS

- Printed images had overly large borders. This has been fixed.

## LAB CASE MANAGER

- The lab case context menu did not appear when you right-clicked a lab case. This has been fixed.

## PATIENTS

- Entering a tooth number changed the procedure code. This has been fixed.

## PERIO CHART

- Missing teeth were not being skipped automatically during perio exams. This has been fixed.

## REPORTS

- An error appeared if you previewed and then tried to print a report. This has been fixed.

## SCHEDULE

- You could not re-size the Lists dialog boxes to avoid scrolling through lists. This has been fixed.

## TREATMENT MANAGER

- If you sent an email message, the Contacts module recorded the email message as a message instead of an email message. This has been fixed.
- You could not print the Treatment Manager List. This has been fixed.

## MISCELLANEOUS

- If you cancelled a letter merge and then re-ran the letter merge, an error message appeared and the letter merge was cancelled. This has been fixed.
- If a monitor's resolution is set higher than 1024, the title bar for Easy Dental modules extended beyond the monitor's top border, and you could not re-size the module window. This has been fixed.
- You could not delete Payment Table entries. This has been fixed.
- You could not edit explosion codes. This has been fixed.





## **Easy Dental 12.1**

# Overview and New Features

This Easy Dental 12.1 Release Guide provides information about the Easy Dental 12.1 software release. This overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Easy Dental 12.1.

**Note:** For information about using the new features in Easy Dental 12.1, refer to “Using the New Features and Changes” in this section of the Release Guide or “What’s New in Easy Dental 12.1?” in the Easy Dental Help.

## New Features and Changes

Easy Dental 12.1 includes the following new features and enhancements:

- **Document Center** – The Document Center was redesigned to include the Patient Banner. The Quick Search area of the Patient Banner now includes a toolbar. The Document Center toolbar now consists of just four buttons that you can use to set up the Document Center and import, export, and print your documents.
- **Quick Search** – A toolbar was added to Quick Search in the Document Center that you can use to narrow your search results.
- **CareCredit** – Easy Dental now integrates with CareCredit. CareCredit provides your patients with a convenient option for financing their treatment. If you accept CareCredit, you can transfer essential patient information automatically to CareCredit and receive a credit decision in seconds. You can process CareCredit transactions in Easy Dental and automatically post payments to the Accounts module.

## Using the New Features and Enhancements

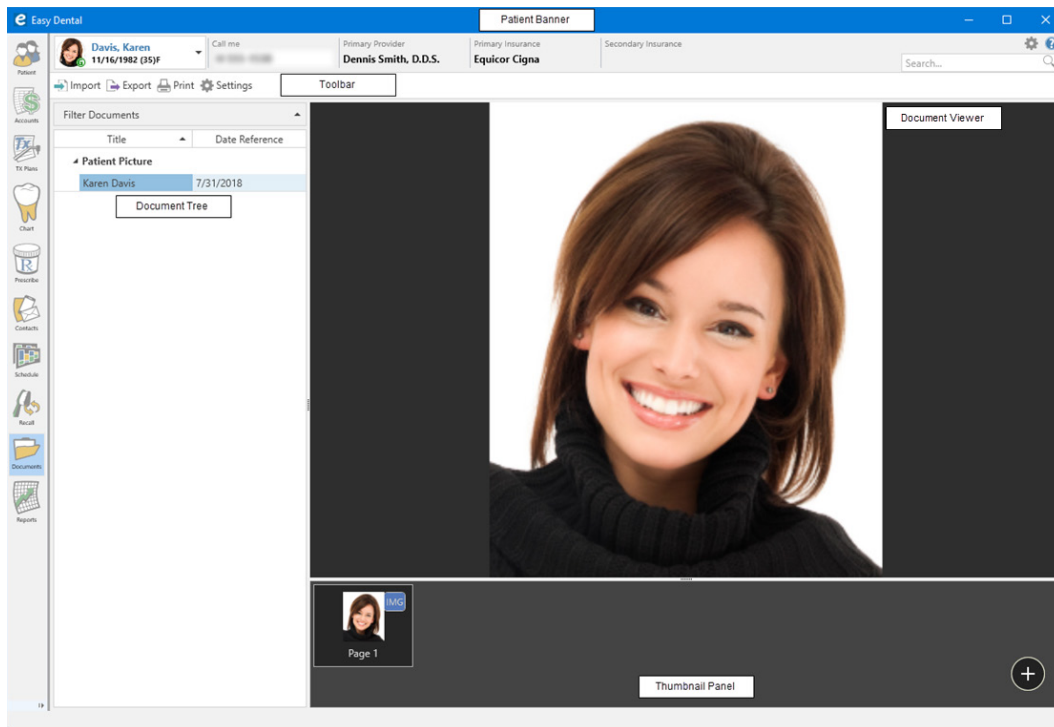
The following information will help you understand how to use the features and enhancements in this release.

### Document Center

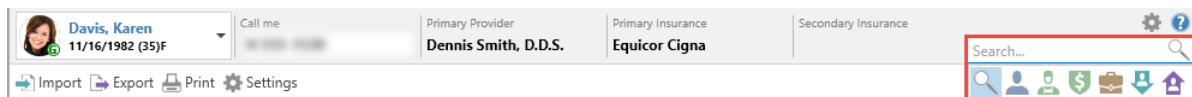
The Document Center window consists of the following areas:

- **Document Tree** - Lists the selected document source (patient, provider, and so forth), any document types that you have used, and the associated documents. The delta symbol next to the folder name indicates whether the list is expanded or collapsed. Click the delta symbol to view the contents of the folder. Click the symbol again to hide the contents. From the Document Tree, you can select the documents to view, edit, and print.
- **Document Viewer** – Displays the document that you selected in the Document Tree. If the document has multiple pages, you can scroll through the pages.
- **Thumbnail Panel** – Displays thumbnail images of the documents in a selected folder in the Document Tree.
- **Patient Banner** – Indicates a selected patient’s name, birthdate, age, and gender. The letter G in green appears if the patient is the guarantor of the account. The banner also includes the patient’s phone numbers, primary provider, primary and secondary providers, the Settings and Help buttons, and the Quick Search text box. Click the Settings button to set up and maintain your practice or to set up passwords. You can quickly find patients, providers, insurance providers, employers, and referrals using Quick Search. Click the Help button to open the Help menu from which you can open the Easy Dental Help or check for, install, and learn about available updates and connect to the Resource Center.

- **Toolbar** – Contains buttons for importing, exporting, and printing documents and setting up the Document Center.



## THE QUICK SEARCH TOOLBAR



Button	Name	Function
	Quick Search	Type search terms in box to search all categories.
	Patients Only	Click to restrict your search to patient records.
	Providers Only	Click to restrict your search to provider records.
	Insurance Only	Click to restrict your search to insurance provider records.
	Employers Only	Click to restrict your search to employer records.
	Referred By Only	Click to restrict your search to referred by records.
	Referred To Only	Click to restrict your search to referred to records.

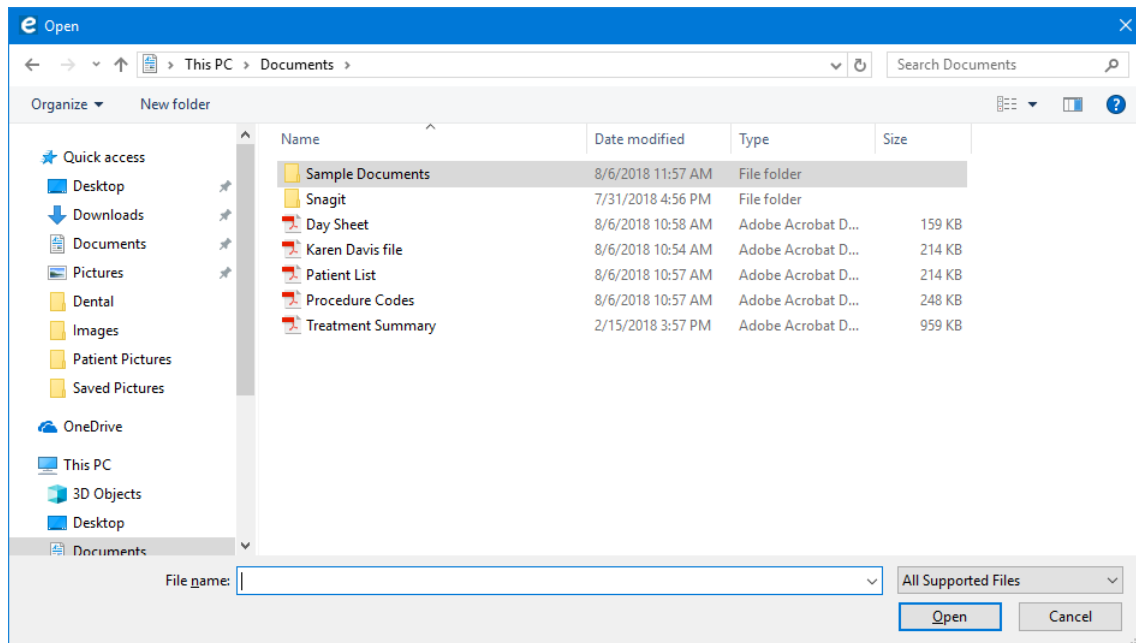
## IMPORTING DOCUMENTS

You can import most common file types (.jpg, .png, .pdf, .bmp, .docx, .xlsx, and others) as documents into the Document Center. You cannot import TIF files into the Document Center.

## To import a document

1. In the Document Center toolbar, click the Import button.

The **Open** dialog box appears.



2. Navigate to and select the document that you want to import, and then click **Open**.

The **New Document Information** dialog box appears.

The screenshot shows the 'New Document Information' dialog box. It contains the following fields and controls:

- Title \***: Text box containing 'Treatment Summary'.
- Reference Date \***: Date picker showing '8/2/2018'.
- Folder \***: Dropdown menu showing 'Correspondence'.
- Document Tags \***: Section with a user icon 'Davis, Karen' and an '+ Add Tag' button.
- Notes**: A large empty text area for adding notes.
- Orientation**: Dropdown menu set to '<None>'.
- File Name**: 'Treatment Summary.pdf' is displayed at the bottom left.
- Buttons**: 'OK' and 'Cancel' buttons are at the bottom right.

3. As necessary, complete one or more of the following tasks:

- **Title** – To rename the document, type a new name in the box.
- **Reference Date** – To set a new date, type the desired date in the box or select a date from the calendar.

**Note:** The reference date for this document displays on the Documents List and when you print it.

- **Folder** – To organize the Document Tree, select the folder that the document will be listed under.
- **Document Tags** – To tag a document and attach it to another patient, a provider, an insurance provider, and so on, click **Add Tag**.

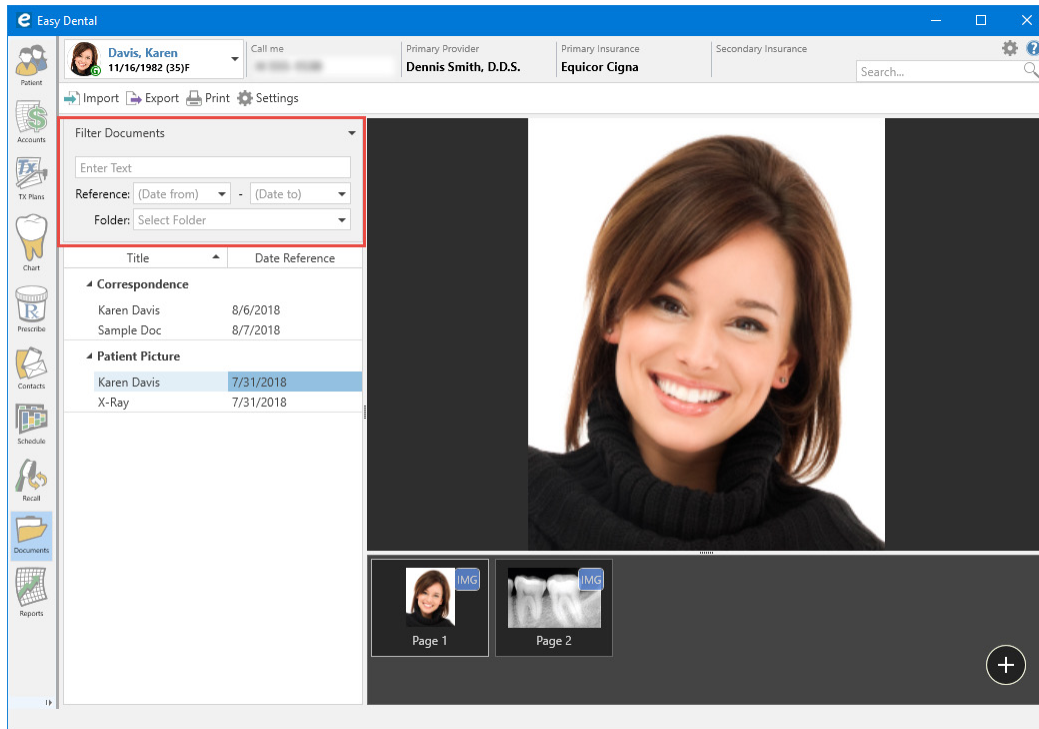
- **Notes** – To add a note, type one in the box.
  - **Orientation** – To change the document's orientation, select one from the list.
4. Click OK.

## FILTERING DOCUMENTS

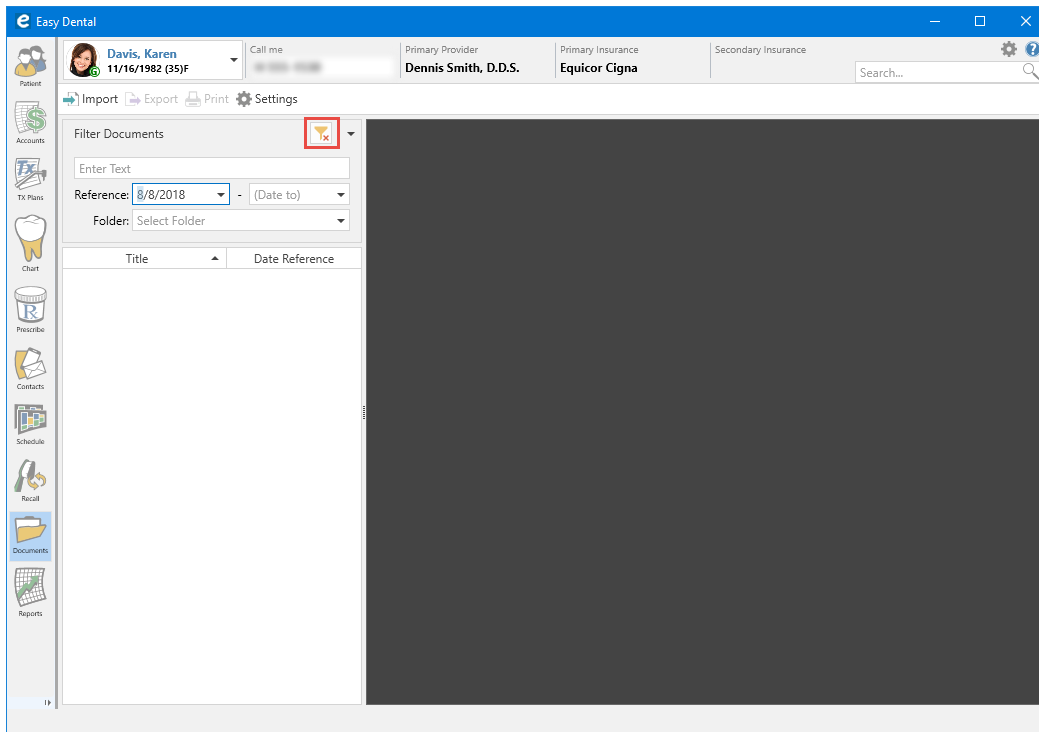
You can view attached documents by patient, provider, insurance carrier, and referral source. You can select filters to view documents within a specific date range and assigned to a particular folder.

### To filter a document

1. In the Document Center, click **Filter Documents**.



2. Do one of the following:
  - To filter documents by tag, document name, or date, type in the **Enter Text** box.
  - To filter documents by a reference date range, enter a date in **(Date from)** and **(Date to)** from their respective calendars.
  - To filter documents by a folder, select a folder from the list.
3. To clear a filter, click the Clear Filter button.

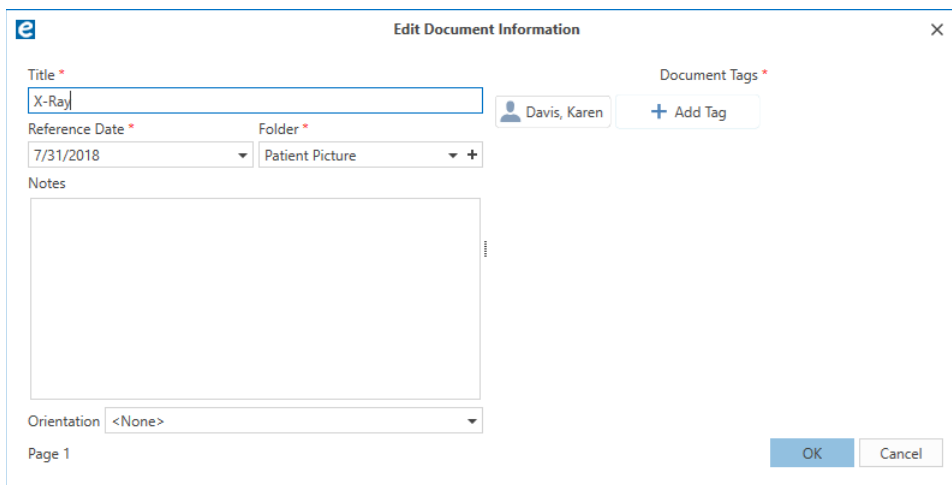


## ADDING DOCUMENT TAGS TO DOCUMENTS

You can use document tags to attach a document to a patient, provider, insurance provider, employer, or referral type.

To add a document tag to a document

1. In the Document Tree, double-click the document that you want to add a document tag to.  
The **Edit Document Information** dialog box appears.



2. Click **Add Tag**.
3. In the **Search** box, click the button corresponding to the document tag you want to apply.

The screenshot shows the 'Edit Document Information' dialog box. The 'Document Tags' section is highlighted with a red box. It contains a search bar labeled 'Search...' and a row of icons: a magnifying glass, a person icon, a person with a plus sign, a dollar sign, a briefcase, a download arrow, and a house icon. The 'Title' field contains 'X-Ray', 'Reference Date' is '7/31/2018', and 'Folder' is 'Patient Picture'. The 'Orientation' is set to '<None>'. There are 'OK' and 'Cancel' buttons at the bottom right.

4. In the **Search** box, type the first few letters of the provider, insurance provider, and so on that you want to tag the document with.
5. Click **OK**.

The name of the document tag appears in the **Edit Document Information** dialog box.

The screenshot shows the 'Edit Document Information' dialog box after a tag has been added. The 'Document Tags' section now displays two tags: 'Davis, Karen' and 'Aetna'. The 'Aetna' tag is highlighted with a red box. There is also an '+ Add Tag' button. The other fields remain the same as in the previous screenshot.

## CareCredit

CareCredit is a type of credit card that your patients can use to pay for their out-of-pocket expenses that are not covered by their dental insurance. They can also use CareCredit to finance dental procedures in excess of \$200 for up to 24 months often interest free.

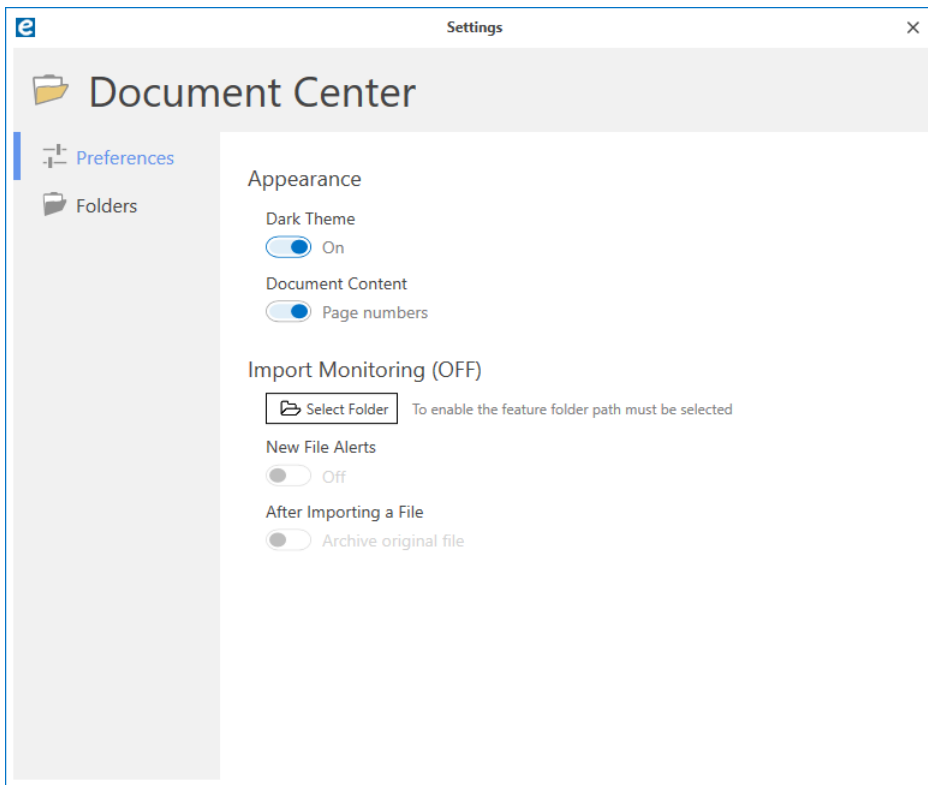
### SETTING UP CARECREDIT

In order to accept payment from patients having CareCredit, you must first obtain a Merchant ID (MID) from CareCredit for each provider in your practice who wants to provide this service to his or her patients. Once you have obtained a Merchant ID, you are ready to set up CareCredit.

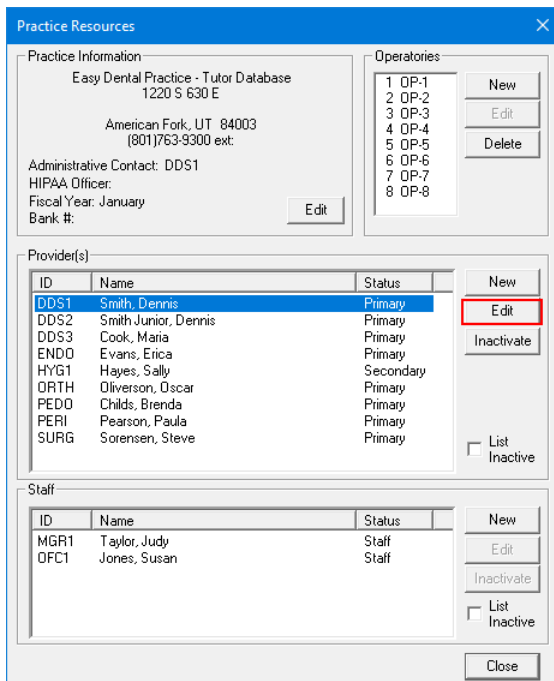
For more information on using CareCredit with Easy Dental, see "CareCredit Overview" in the Easy Dental Help.

#### To set up CareCredit

1. In the Patient Banner, click the Settings button.  
The **Settings** dialog box appears.



- Click **Practice setup**, and then click **Practice Resource Setup**. The **Practice Resources** dialog box appears.



- Select the provider who accepts CareCredit, and then click **Edit**. The **Provider Information** dialog box appears.



The screenshot shows the 'Provider Information' dialog box with the following fields and sections:

- Personal Information:** First Name (Dennis), MI, Last Name (Smith), ID (DDS1), Title (D.D.S.), Suffix, Non-Person checkbox, Specialty (Dentist), Street Address (DDS1\_1220 S 630 E), City (American Fork), ST (UT), Zip (84003), Phone (801)763-9300, Ext., E-Mail.
- Professional Information:** Fee Schedule (1. Office), SS#, State ID#, State (DDS1\_StateID), State License Expiration, TIN#, DDS1\_TIN, Medicaid#, DDS1\_Medicaid, DEA#, DDS1\_DrugID, DEA License Expiration, DEA Schedule (I, II, III, IV, V checkboxes).
- Assigned Operatives:** List of operators (1 OP-1, 2 OP-2, 3 OP-3, 4 OP-4) and Class (Primary, Secondary radio buttons).
- Care Credit:** Merchant ID field (highlighted with a red box).
- Insurance Claim Options:** Print Provider's Signature Using (Signature On File, Provider's Name radio buttons).
- Blue Cross/Shield #:** Blue Cross (selected), Blue Shield, DDS1\_BlueCross.
- Other Fields:** NPI, Provider#, DDS1\_Provider, Office#, DDS1\_Office, Other ID#, UPIN#, Controlled Substance#.
- Buttons:** Provider ID Setup, Electronic Rx User, OK, Cancel.

4. Under CareCredit, enter the provider's Merchant ID.
5. Click OK.

## ENTERING CARECREDIT PAYMENTS

You can process CareCredit transactions in Easy Dental and automatically post payments to the Accounts module.

### To enter a CareCredit payment

1. In the Patient Banner, select the patient whose payment you want to process.
2. In the Accounts module, click the CareCredit toolbar button.  
The CareCredit portal opens.
3. Enter the information that CareCredit requires to complete the transaction.

## REFUNDING CARECREDIT PAYMENTS

### To refund a CareCredit payment

You can process CareCredit refunds in Easy Dental and post them automatically to the Accounts module.

1. In the Patient Banner, select the patient whose payment you want to process.
2. In the Accounts module, select the CareCredit payment that you want to refund, and then click the CareCredit toolbar button.  
The CareCredit portal opens.
3. Enter the information required to process the refund and submit the transaction.  
The refund is posted to the Accounts module.

# Easy Dental 12.1 Software Changes and Fixes

The following list contains descriptions of the fixes included in Easy Dental 12.1:

## ACCOUNTS

- Payment types did not appear in the **Search Payments** dialog box. Selecting and clearing the **All** option generated an error. This has been fixed.

## CHART

- Procedures were duplicated whenever the Refresh toolbar button was clicked. This has been fixed.
- Text in Clinical Notes would not wrap. This has been fixed.

## DOCUMENT CENTER

- The resolution of scanned images was so low that the images were pixilated. This has been fixed.
- You could not import more than 15 images at a time. This has been fixed.

## PATIENTS

- Archived patients were removed from the Patients module but still appeared in the Patient Banner. This has been fixed.
- In Patient Survey if a question contained more than 50 characters and you tried to print the survey, Easy Dental stopped responding. This has been fixed.

## REPORTS

- The Insurance Aging Report stopped responding when users selected the **Print to File** option. This has been fixed.

## SCHEDULE

- If you frequently moved appointments and the database contained multiple events, the Schedule stopped responding. This has been fixed.
- If you edited an appointment on the Clipboard, the appointment remains pinned to the Clipboard. This has been fixed.
- Views were not switched when the keyboard function keys (F1, F2, and F3) were pressed. This has been fixed.
- Appointments were moved to the Unscheduled List rather than the Clipboard if you clicked the Clipboard button in the **Appointment Information** dialog box. This has been fixed.

## TREATMENT MANAGER

- The Treatment Manager opened with the guarantor of the account rather than the selected family member. This has been fixed.

## MISCELLANEOUS

- In Patient Picture, if you tried to add a picture by clicking the Select Source or Acquire New Image toolbar buttons, Easy Dental stopped responding. This has been fixed.

- 
- If you edited items that appear in the Patient Banner, such as a patient alert (electing to have the alert not appear, for example), the alerts still appear. Additionally, selected items (procedures in the Accounts module and teeth in the Chart) were no longer selected. These items have been fixed.
  - The INS toolbar button in the Accounts and Treatment Plans modules did not have a tool tip. This has been fixed.



# Easy Dental 12

# Overview and New Features

This Easy Dental 12 Release Guide provides information about the Easy Dental 12 software release. This overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Easy Dental 12.

**Note:** For information about using the new features in Easy Dental 12, refer to “Using the New Features and Changes” in this section of the Release Guide or “What’s New in Easy Dental 12?” in the Easy Dental Help.

## New Features and Changes

Easy Dental 12 includes the following new features and enhancements:

- **Database update** – The Easy Dental database was upgraded. This upgrade supports file sizes greater than 2GB and memory above 2GB. The new database also provides a more robust development platform for incorporating new features and updating existing ones.
- **Update Manager** – The Update Manager was improved so that you have access to critical updates regardless of Easy Dental Service Bundle status. While you can view all available updates, you can only download and install non-critical updates if your Easy Dental Service Bundle is not active. You can suspend critical updates for a single day only. However, you can suspend non-critical updates for a maximum of 30 days. You can now install downloaded updates without an Internet connection.
- **Updated interface** – The look and feel of the Easy Dental interface was updated. The color of the Modules toolbar icons was changed to reflect a more 21st century aesthetic. Also, you can now customize the Modules toolbar. You can increase the size of the toolbar and its icons, and you can add or remove the icons in the **Customize Toolbar** dialog box. Changes to the toolbar are workstation specific, so you could create a toolbar for your office staff that only included the Schedule, Patient, Accounts, and/or Reports icons.
- **Patient Banner** – The Patient Banner appears above the toolbar of every patient-specific module. The Patient Banner includes a selected patient’s name, birthdate, age, gender, phone numbers, primary provider, and primary and secondary insurance providers. Also included are the Settings (to set up your practice) and Help toolbar buttons and the Quick Search text box.
- **Quick Search** – You can now search for patients using a new search text box that incorporates a more robust search engine that makes it possible to search the database quickly for patients.
- **Help About** – The **Help About** dialog box was modified to list all of the modules and files and their version numbers. The dialog box also includes the your Easy Dental serial number and database version number. To open the **Help About** dialog box, click the Help button in the Patient Banner, and then click **About**.
- **DPI Scaling** – For computers running Windows 8.1 and higher, Easy Dental was enhanced to support high-resolution (4K) devices, such as tablets and high-end monitors. With DPI scaling, the size of a module window adjusts automatically to compensate for the resolution of the device you are using. Without DPI scaling, screen images appear distorted on tablets and 4K monitors.

# Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release.

## Patient Banner

The look and feel of the Easy Dental interface was updated and now includes the Ribbon toolbar, a Settings toolbar button, and a search text box. The Ribbon toolbar only appears when you have a module open from which you can select a patient and contains the patient's name and birthdate, phone number, primary provider, and primary and secondary insurance.

The screenshot displays the Easy Dental Patient Banner for Johnny Edwards. The banner includes a search bar, a ribbon toolbar, and a table of family members. Below the table, there are sections for patient details, alerts, insurance, and employer information.

Status	Name	Position	Gender	Patient	Birthdate
HofH Guar Ins	Edwards, John	Married	Male	Yes	07/14/1963
Ins	Edwards, Anna	Married	Female	Yes	08/20/1967
	Edwards, John	Child	Male	Yes	03/20/1999
	Edwards, Kimberly	Child	Female	Yes	08/24/2001

**Name:** Mr. Edwards, John (Johnny)  
**Address:** 3717 Slemis Street, American Fork, UT 84003  
**Phone:** H 555-7101  
**Status:** Active, M, Married, Guar, Ins, H-of-H

**Consent:** 01/05/2012  
**First Visit:** 01/05/2012  
**Last Visit:** 01/05/2012  
**Missed Appt:** 02/01/2012, 6

**Chart #:** ED0001  
**SS#:**  
**DL#:**  
**Birthdate:** 07/14/1963, 54  
**Provider:** ENDO  
**Fee Sched:** <Prov Default>

**Alerts:**  
**Recall:** 01/15/18 BITEWINGS, 01/15/18 PROPHY

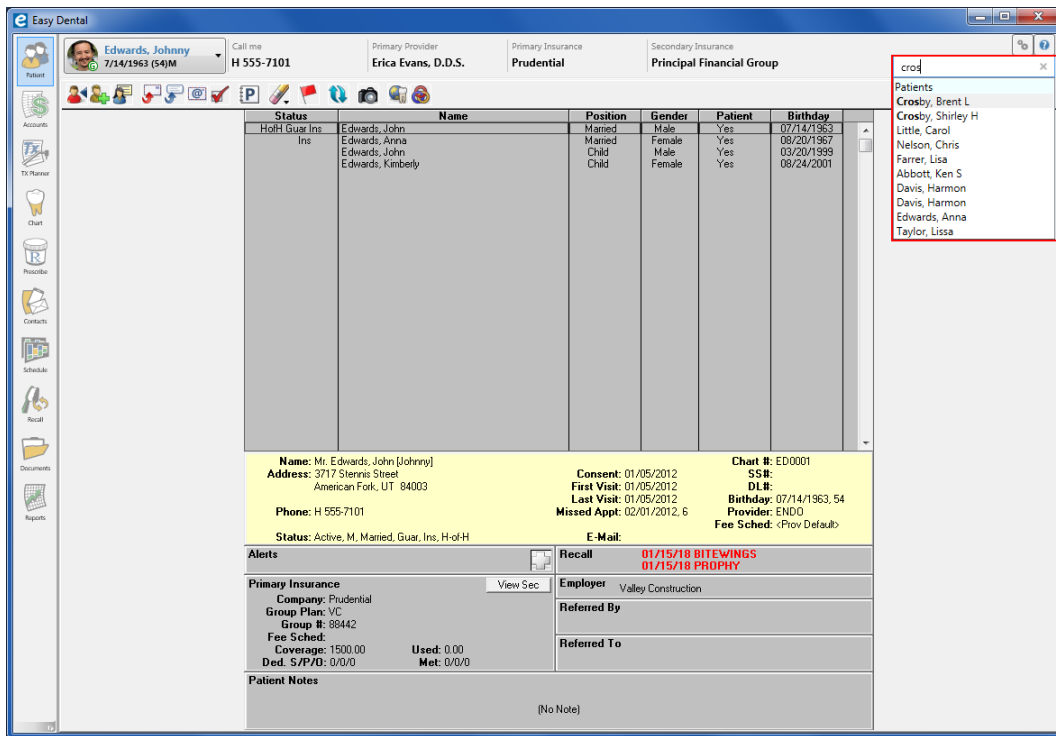
**Primary Insurance:** Prudential, Company: Prudential, Group Plan: VC, Group #: 88442  
**Coverage:** 1500.00, **Used:** 0.00  
**Ded. S/P/D:** 0/0/0, **Met:** 0/0/0

**Employer:** Valley Construction  
**Referred By:**  
**Referred To:**

**Patient Notes:** (No Note)

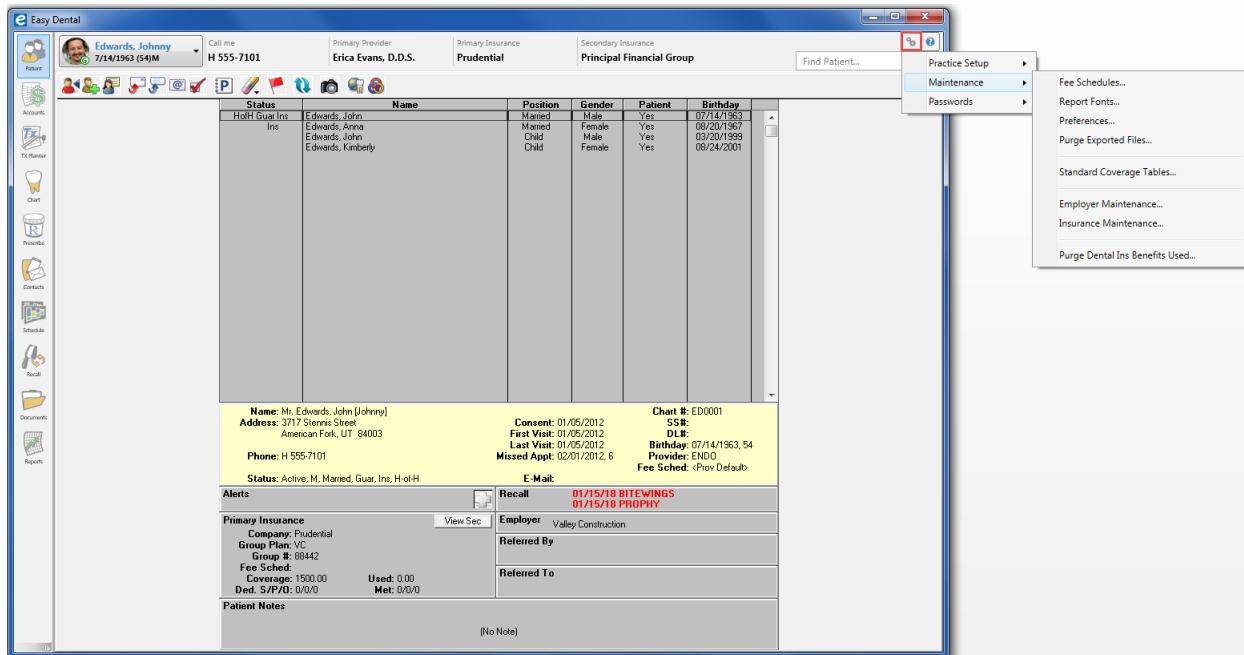
## Quick Search

You can use the Quick Search feature to find a patient without using the **Select Patient** dialog box. To conduct a search, type a letter (as you type, names move to the top of the list that most closely match the letters you type) of a patient's first, middle, or last name in the text box, and then in the list, click the desired patient's name.



## Settings Button

By clicking the Settings button, you can set up your practice, perform maintenance tasks, and set up passwords without having to open the Reports module.

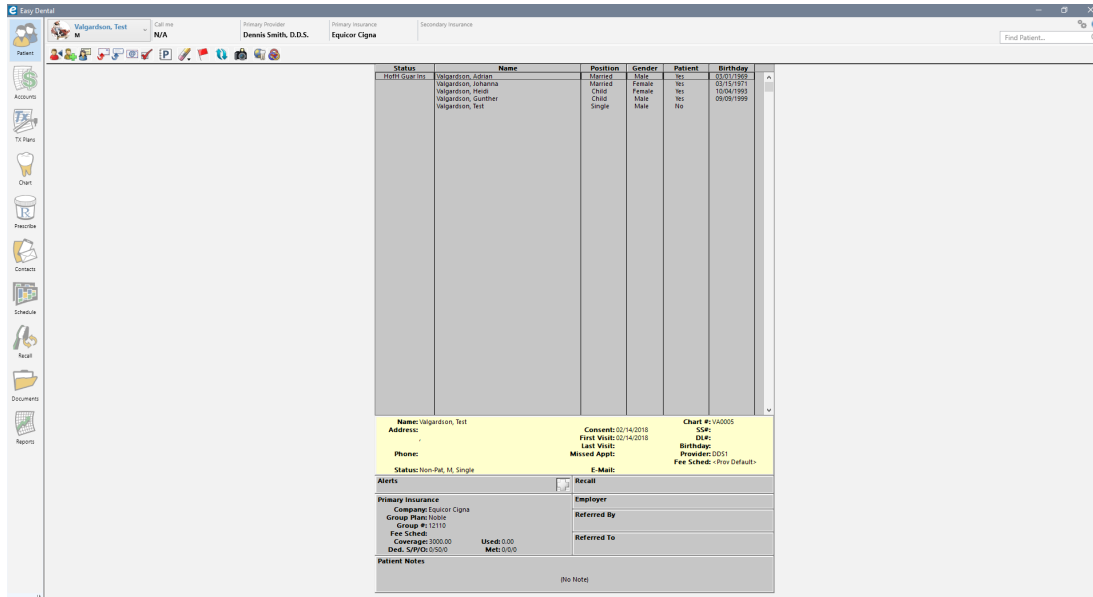




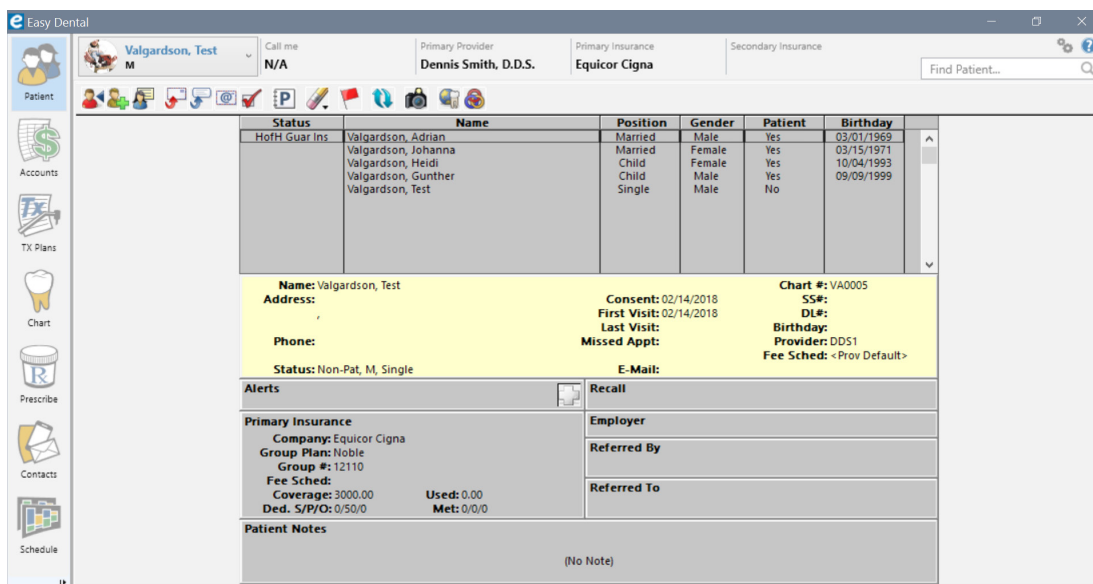
# DPI Scaling

For computers running Windows 8.1 and higher, Easy Dental was enhanced to support high-resolution (4K) devices, such as tablets and high-end monitors. With DPI scaling, a module window's size adjusts automatically to compensate for the resolution of the device you are using. Without DPI scaling, screen images appear distorted on tablets and 4K monitors.

## With Scaling



## Without Scaling



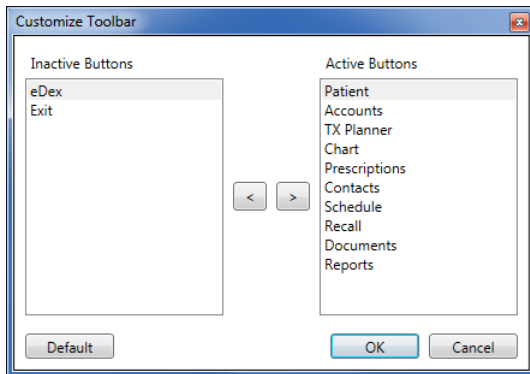
## Customizing the Modules Toolbar

You can re-size the Modules toolbar and its buttons, and you can add or remove the buttons in the Customize Toolbar dialog box. Since changes to the toolbar are workstation specific, you could modify the toolbar so that your front office staff would only see the Patient, Accounts, and/or Reports buttons. You could also modify the toolbar for your operatory staff to only see the Schedule, Chart, Treatment Plans, and Recall buttons.

### To customize the Modules toolbar

1. Right-click the Modules toolbar, and then click **Customize Toolbar**.

The **Customize Toolbar** dialog box appears.



2. To remove a button from the toolbar and place it on the **Inactive Buttons** list, select the button's name from the **Active Buttons** list and click the < button.
3. Click **OK** to remove the button from the Modules toolbar.
4. To return the toolbar to its default settings, in the **Customize Toolbar** dialog box, click **Default**, and then click **OK**.
5. To re-size the toolbar and its buttons, right-click the toolbar, and then clear the **Lock Toolbar** option.
6. Drag the right border of the toolbar to the right to increase or to the left to decrease the toolbar's size.

The toolbar buttons become bigger or smaller in concert with the toolbar.

## Easy Dental 12 Software Changes and Fixes

The following list contains descriptions of the fixes included in Easy Dental 12:

### ACCOUNTS

- If you deleted a claim and then closed Easy Dental, the Insurance Claim window did not close. This has been fixed.
- You could not scroll using the mouse wheel. This has been fixed.
- The sort order in the Accounts module was incorrect. This has been fixed.
- If you closed the account detail pane, the transaction log did not refill the vacated space. This has been fixed.

### DOCUMENTS

- Exporting a document from the Documents module added the phrase "1of1" to the document's filename. This has been fixed.

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## PATIENTS

- In the **Insurance Information** dialog box, you could set the subscriber to “Self” for secondary insurance even though another family member was the subscriber. This has been fixed.

## PERIO CHART

- The Perio Chart would not open. This has been fixed.

## REPORTS

- If you tried to print an eClaim in the Batch Processor from the **Validation Report** dialog box, you received an application error. This has been fixed.
- The treatment area in the Procedure Code List Report was blank even though “Arch” was selected as the treatment area. This has been fixed.
- The “File not found” error message appeared when you opened a letter template. This has been fixed.

## SCHEDULE

- Clicking the **Create New Appt** button in the **Family Appointment List** dialog box did not create a new appointment. This has been fixed.
- If the database contained several events, Easy Dental stopped responding when you moved appointments several times. This has been fixed.

## TREATMENT PLANNER

- Pre-treatment estimates and insurance claim amounts for the same procedures did not match. This has been fixed.
- Pre-treatment estimates and insurance claim amounts were not calculated using either the payment table or co-pay amounts. This has been fixed.

## MISCELLANEOUS

- If you clicked the **Open Template** button in the **Patient Report View** dialog box, Easy Dental stopped responding. This has been fixed.
- Occasionally, if a patient’s name contained a comma, letter merge stopped responding. This has been fixed.
- If you click **Suspend Highlighted** to suspend downloading an update and do not download or install another update during the same session, the update is only suspended until the next time you open Update Manager. This has been fixed.
- If you suspended updates, you received unhandled exception and other errors. This has been fixed.

