easydental® 2009

transition guide

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Easy Dental 2009 Transition Guide

The Easy Dental 2009 release contains several exciting enhancements and new features. Some of these new features and enhancements may affect the work routines you are currently using. To help you make a smooth transition from Easy Dental 2008 to Easy Dental 2009 and get your office up and running faster, this Transition Guide illustrates, describes, and compares existing Easy Dental 2008 features to the new features in Easy Dental 2009.

The Easy Dental 2009 Transition Guide includes a detailed new features list, along with comparisons that provide visual representations and text explanations of the way features have changed from Easy Dental 2008 to Easy Dental 2009. It also includes a detailed explanation of two of the important, complex new features.

For more information about the features listed in this guide, refer to the Easy Dental 2009 User's Guide (available for download at **www.easydental.com**).

Easy Dental 2009 New Features

Easy Dental 2009 contains several major enhancements and new features. The following enhancements and new features are illustrated and described in more detail in this guide:

- **Perio Module:** Easy Dental 2009 includes a Perio mdoule, so you can track patients' periodontal health in your Easy Dental system. You can create new exams, enter perio clinical notes, compare two exams, and print perio charts and letter. The Perio module allows you to use one of six different pre-defined navigation scripts so you can enter perio measurements according to your own measurement style.
- **Registration/Activation:** Registration/activation is required with Easy Dental 2009. Registering/activating your software allows the Check for Updates feature to know which version of the software you are using to provide you with key software updates. Registration/activation also allows Easy Dental Customer Support Representatives to know which version of Easy Dental you are using in order to provide better service when answering your questions.
- **Help Menu:** You can access several important pages on the Easy Dental website from the Help button in every module. The Help button includes links to the Easy Dental Resource Center.
- **Billing Statements:** When setting up billing statements, you can specify whether you want to send the statement to batch, print the statement, or send the statement electronically.
- **Check for Updates:** Check for Updates allows you to install the most current version of Easy Dental without having to manually download or use a CD. From the Help button in each module, you can use the Check for Updates feature to compare your Easy Dental software to the most recent version available on the Easy Dental website and check for updates that need to be installed on your system. Or, in the Preferences dialog, you can check to have Easy Dental automatically check for updates each time you open Easy Dental for the first time on each computer in your office. Once you have checked for updates, you can select to install the available updates to keep your system up to date.
- **Easy Checkout Options:** You can specify if you want to send claims electronically and if you want to print an appointment reminder label when you use the Easy Checkout button.
- **Purge Unscheduled Appointments:** In the Schedule module, you can now purge appointments on the Unscheduled List based on a cut-off date, saving you time from having to delete the appointments one at a time.
- **Search Payments:** In the Accounts module, you can search for specific payments by check number, amount, date, insurance carrier, or account.

The following enhancements and new features are included in the Easy Dental 2009 release, but are not illustrated in this guide:

- **Claim Statuses in Accounts Module:** To help you see the status of your insurance claims at a glance in the Transaction Log in the Accounts module, one of four new, descriptive claim statuses are listed next to insurance claims: Created, Batched, Printed, or eSent. The existing status of Received is also displayed along with the new claim statuses.
- **Insurance Claims to Process Report:** You can view rejected claims along with the created claims on the Insurance Claims to Process Report (formerly the Insurance Claims not Sent report) so that all claims that need to be processed are displayed on the report.
- **Smart Upgrades:** With Easy Dental, you only need to install updates on one computer on the network. If an update is installed on any computer (server or workstation), all other computers on the network display a message saying that an update is available. Depending on the nature of the update, some updates will be required to be installed and some will be optional. Billing Statements: When setting up billing statements, you can specify whether you want to send the statement to batch, print the statement, or send the statement electronically.

Legend:

= Existing Feature

= New Feature in Easy Dental 2009

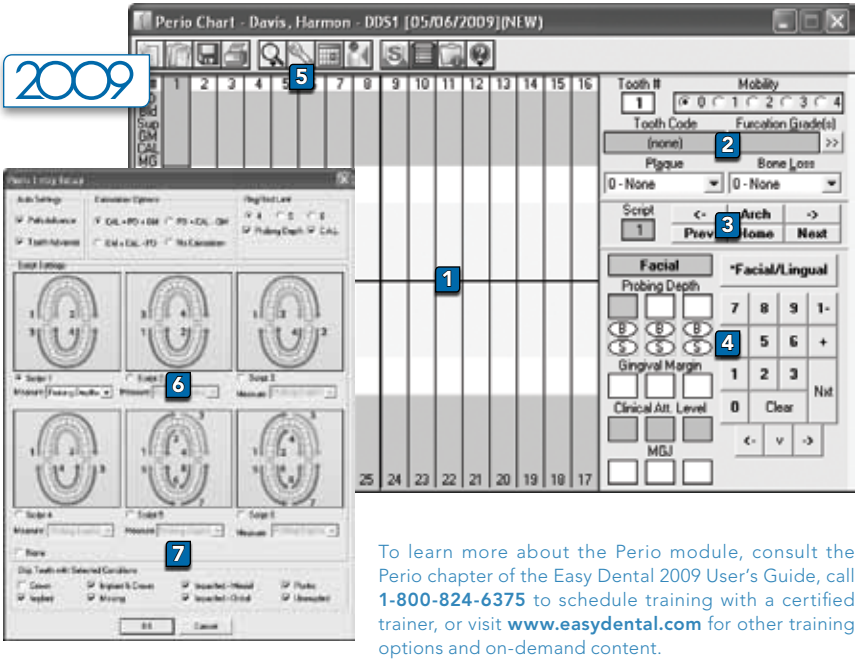
= 2008 version

= 2009 version

Perio Module

The Perio module is a new feature in the Chart module that allows you to create new exams, enter perio clinical notes, compare two exams, and print perio charts and letters. This section displays the Perio module and the Perio Entry Setup dialog, and describes each feature.

1. User the Data Chart to input and display all periodontal data for the current perio exam.
2. Enter classifications for plaque, mobility, bone loss, and furcation grade.
3. Use the Navigation Controls to advance from tooth to tooth and move around the mouth.
4. Enter the measurements for each site of the selected tooth.
5. Click to open the Perio Entry Setup dialog.
6. Select the pre-defined navigation script that best fits your measurement style.
7. Check the tooth conditions to have Easy Dental automatically skip teeth with the condition.



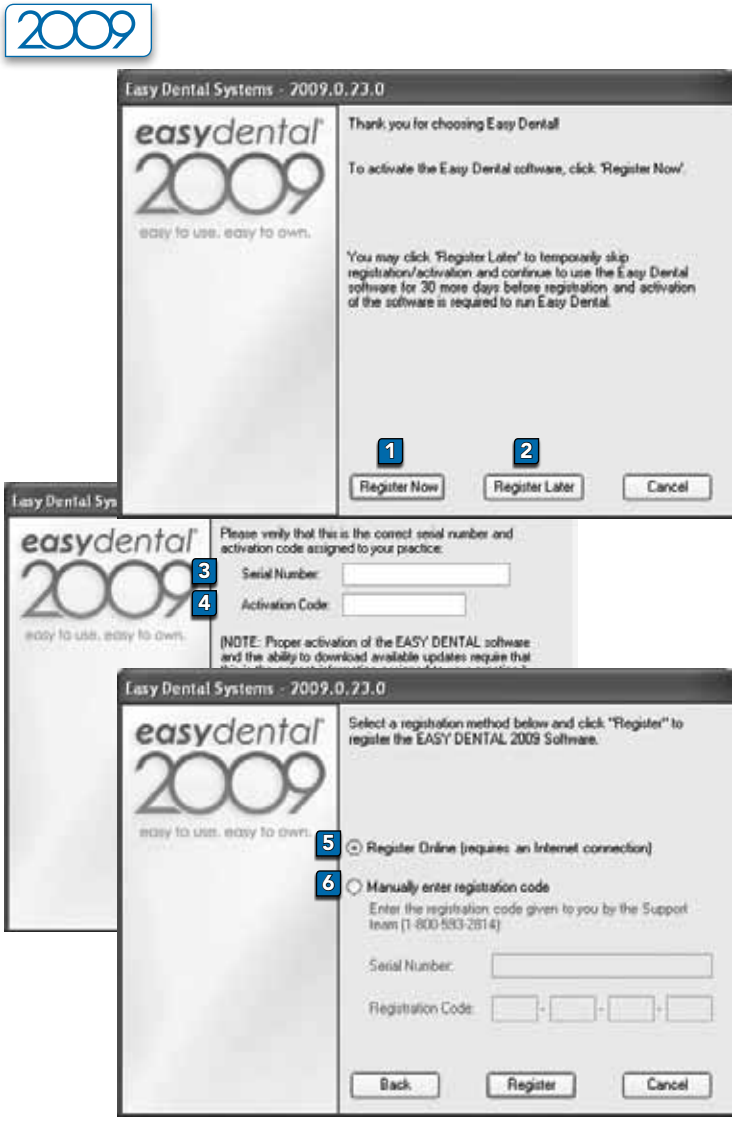
To learn more about the Perio module, consult the Perio chapter of the Easy Dental 2009 User's Guide, call **1-800-824-6375** to schedule training with a certified trainer, or visit **www.easydental.com** for other training options and on-demand content.

Registration/Activation

Registration/activation is required for Easy Dental 2009. Registering/activating Easy Dental 2009 allows you to receive version-specific communication and upgrades from Henry Schein Practice Solutions. You can register/activate Easy Dental at the time of installation, or you can delay registration/activation for up to 30 days after the installation. After 30 days, you cannot access Easy Dental without registering/activating your software.

1. Click to begin the registration/activation process.
2. Click to ignore the registration/activation and close the dialog, so you can access Easy Dental without registering/activating your software. You will be prompted to register once a day until you register your Easy Dental software.
3. Verify that the serial number in this field is the serial number assigned to your office. You can find the serial number assigned to your office on the card that was included with your Easy Dental 2009 box. If you have lost or misplaced the card please visit **www.easydental.com/support/activation** or contact support at **1-800-593-2814**.
4. Enter the activation code assigned to your office. You can find the activation code assigned to your office on the card that was included with your Easy Dental 2009 box. If you have lost or misplaced the card please visit **www.easydental.com/support/activation** or contact support at **1-800-593-2814**.
5. Mark to send your serial number, activation code, and practice information to HSPS via the Internet and have your software automatically registered/activated.
6. If you do not have an Internet connection, mark to manually enter the registration code you received when you called Easy Dental Support at **1-800-824-6375**.

To learn more about registering/activating Easy Dental, consult the Easy Dental 2009 Installation Guide, call **1-800-824-6375** to schedule training with a certified trainer, or visit **www.easydental.com** for other training options and on-demand content.


2009
Easy Dental Systems - 2009.0.23.0
easydental
2009
easy to use. easy to own.
Thank you for choosing Easy Dental!
To activate the Easy Dental software, click 'Register Now'.
You may click 'Register Later' to temporarily skip registration/activation and continue to use the Easy Dental software for 30 more days before registration and activation of the software is required to run Easy Dental.
1
2
Register Now
Register Later
Cancel
Easy Dental Sys
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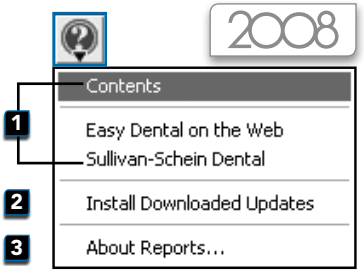
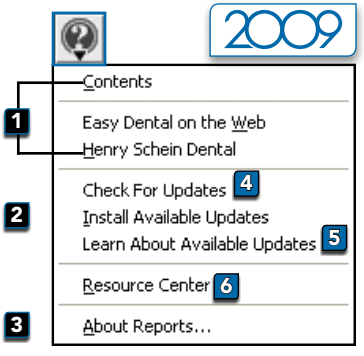
2009
easy to use. easy to own.
Please verify that this is the correct serial number and activation code assigned to your practice:
3
Serial Number:
4
Activation Code:
(NOTE: Proper activation of the EASY DENTAL software and the ability to download available updates require that
Easy Dental Systems - 2009.0.23.0
easydental
2009
easy to use. easy to own.
Select a registration method below and click "Register" to register the EASY DENTAL 2009 Software.
5
Register Online (requires an Internet connection)
6
Manually enter registration code
Enter the registration code given to you by the Support team (1-800-583-2814)
Serial Number:
Registration Code:
Back
Register
Cancel

Help Menu

The Help button that existed in Easy Dental 2008 still exists in Easy Dental 2009, but includes a new option to open an Internet browser and go to the Easy Dental Resource Center. The images compare the Help button menu in both versions of Easy Dental, and the text describes the features of each menu.

1. Click to open the Easy Dental help files, go to **www.easydental.com** or **www.henryschein.com**.
2. Click to install any available updates on the current server or workstation. When you have installed updates on one computer on the network, the next time you open Easy Dental on another computer on the network, the Smart Upgrades feature will check the other computers on the network to see if the updates have been installed. If updates have been installed on any other computer on the network, a notification that lists the updates appears. You can install the updates from this notification dialog. You must install the required updates if they have been installed on another computer on the network.
3. Click to see the version of Easy Dental installed on the current server or workstation.
4. Click to have the system compare your Easy Dental software to the most recent version available on the Easy Dental website and check for updates. If you want Easy Dental to automatically check for available updates, see the "Check for Updates" section for more details.
5. Click to open the Easy Dental website and view an explanation of the available updates.
6. Click to open the Resource Center.

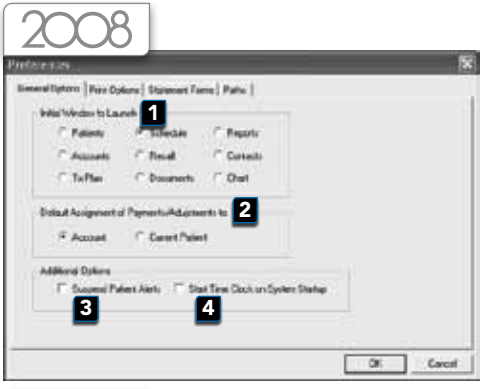


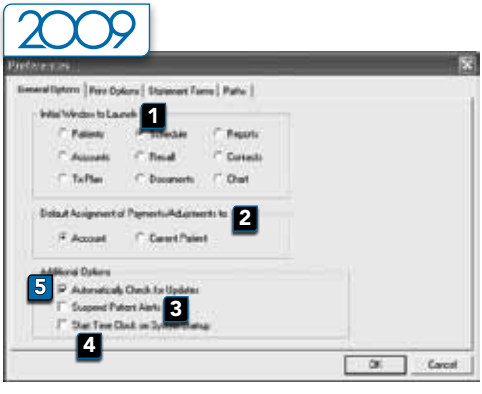


To learn more about the Help menu feature, consult the Other Features chapter of the Easy Dental 2009 User's Guide, call **1-800-824-6375** to schedule training with a certified trainer, or visit **www.easydental.com** for other training options and on-demand content.

Check for Updates

The Preferences dialog that existed in Easy Dental 2008 still exists in Easy Dental 2009, but includes a new option to check for updates. The Check for Updates feature automatically compare your Easy Dental software to the most recent version available on the Easy Dental website and check for updates that need to be installed on your system. The images compare the Preferences dialog in both versions of Easy Dental, and the text describes the features of each dialog.





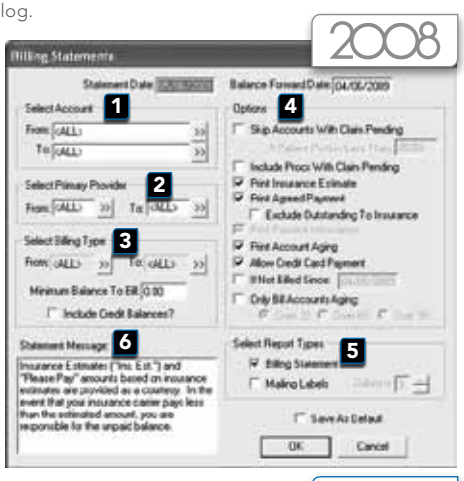
1. Mark the module you want to open to each time you open Easy Dental for the first time.
2. Mark who you want payments and adjustments to be assigned to by default.
3. Check to suspend patient alerts from popping up on this computer.
4. Check to open the Time Clock in the System Tray each time you turn on this computer.
5. Check to have the system automatically compare your Easy Dental software to the most recent version available on the Easy Dental website and check for updates each time Easy Dental is opened for the first time.

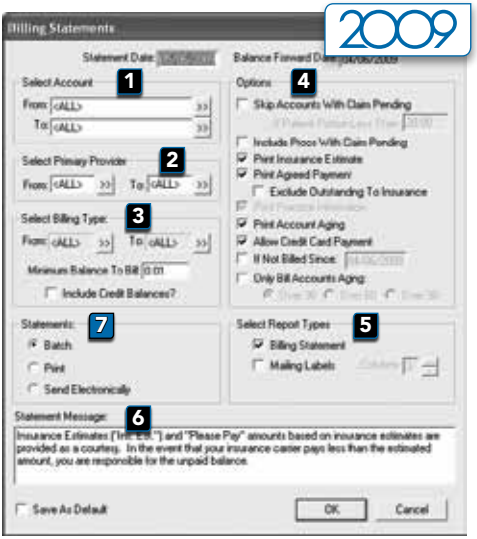
To learn more about the check for Update feature of Easy Dental, consult the Easy Dental 2009 Installation Guide, call **1-800-824-6375** to schedule training with a certified trainer, or visit **www.easydental.com** for other training options and on-demand content.

Billing Statements

The billing statements report filters that existed in the Easy Dental 2008 Reports module still exist in Easy Dental 2009, but one additional feature has been added. The images compare the Billing Statements dialog in both versions of Easy Dental, and the text describes the features of each dialog.

1. Select a range of accounts for your search criteria, so only the desired guarantors are included in the statement.
2. Select a range of primary providers for your search criteria, so only the desired providers are included in the statement.
3. Select a range of billing types for your search criteria, so only the desired billing types are included in the statement.
4. Check the search criteria you want to use to make sure the desired information is included on the billing statement.
5. Check the report types you want to generate. You can generate both billing statements and mailing labels at the same time.
6. Edit the default statement message as desired if you want to include a message on all the billing statements.
7. Mark to send billing statements to the Batch Processor, the printer, or to send the statements electronically. (You can only send statements electronically if you have set up QuickBill.)

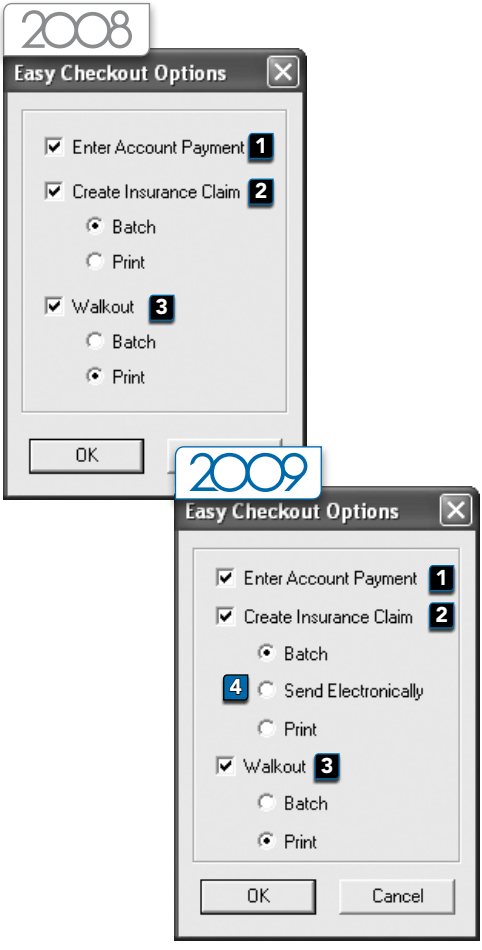




To learn more about billing statements, consult the Reports chapter of the Easy Dental 2009 User's Guide, call **1-800-824-6375** to schedule training with a certified trainer, or visit **www.easydental.com** for other training options and on-demand content.

Easy Checkout Options

The Easy Checkout Options dialog that existed in the Easy Dental 2008 Accounts module still exists in Easy Dental 2009 but has an additional setting. The images compare the Easy Checkout Options dialog in both versions of Easy Dental, and the text describes each feature.



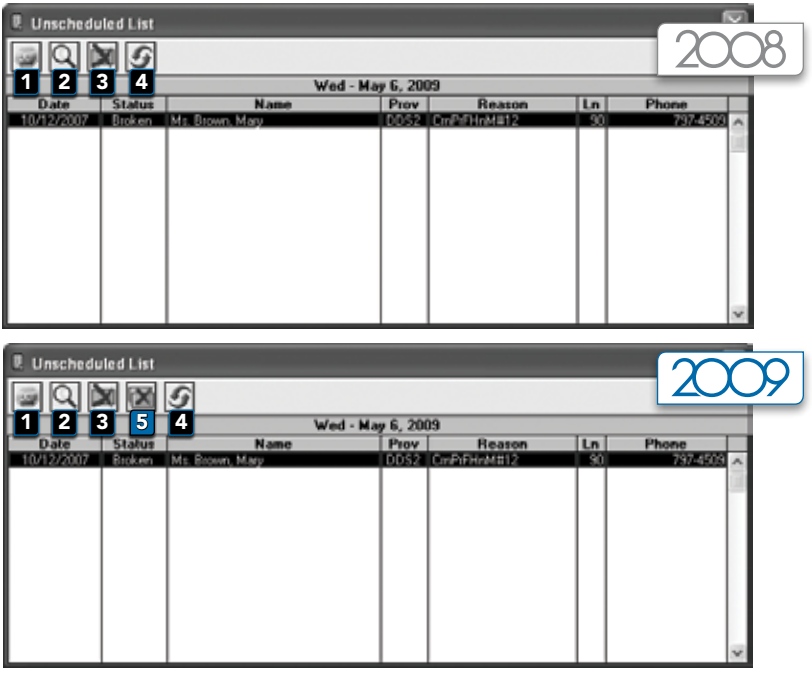
1. Check to enter a payment when you click a Easy Checkout button, so you don't have to enter a payment manually.
2. Check to create an insurance claim when you click the Easy Checkout button, so you don't have to create a claim manually.
3. Check to create a walkout statement when you click the Easy Checkout button, so you don't have to create a walkout statement manually.
4. Mark to send the insurance claim electronically when you click the Easy Checkout button, so you don't have to send the insurance claim manually. (You can only send the statement electronically if you have set up QuickBill.)

To learn more about the Easy Checkout feature, consult the Accounts chapter of the Easy Dental 2009 User's Guide, call **1-800-824-6375** to schedule training with a certified trainer, or visit **www.easydental.com** for other training options and on-demand content.

Purge Unscheduled Appointments

The Unscheduled List options that existed in the Easy Dental 2008 Schedule module still exist in Easy Dental 2009, but one additional feature has been added. The images compare the Unscheduled List in both versions of Easy Dental, and the text describes the features of each dialog.

1. Click to exit the Unscheduled List and return to the Schedule module.
2. Click to set up the view options for the Unscheduled List.
3. Click to delete the selected appointment from the Unscheduled List.
4. Click to refresh the list of appointments in the Unscheduled List.
5. Click to purge appointments as of a specified date from the Unscheduled List.

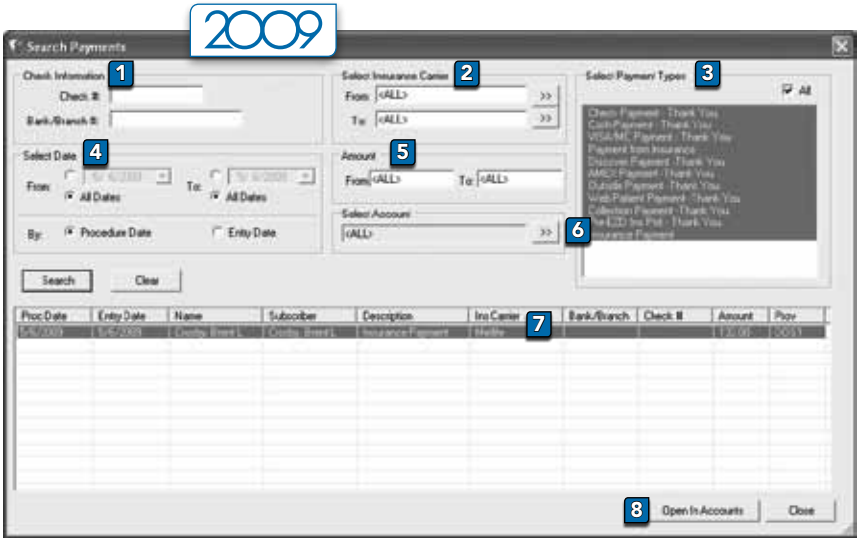


To learn more about the Unscheduled List, consult the Schedule chapter of the Easy Dental 2009 User's Guide, call **1-800-824-6375** to schedule training with a certified trainer, or visit **www.easydental.com** for other training options and on-demand content.

Search Payments

Search payments is a new feature in the Accounts module that allows you to search for payments posted in the Accounts module. This section displays the Search Payments dialog and describes each feature.

1. Enter the check number or bank/branch number if you want to search for a payment by check number.
2. Select an insurance carrier or a range of carriers by which you want to search.
3. Highlight the payment types you want to include in the search, or check All to include all payment types.
4. Select a date or date range by which you want to search. Mark whether to search by procedure date or entry date.
5. Enter an amount or amount range to search for a payment by the amount.
6. Click the search button to select an account by which you want to search.
7. Search results are listed in this list box. Click any column heading to sort the list by that column. You can also click and drag columns to rearrange the order of the columns, so they match your preferred workflow.
8. Click to open the Accounts module for the patient selected in the list box.



To learn more about the Search Payments feature, consult the Accounts chapter of the Easy Dental 2009 User's Guide, call **1-800-824-6375** to schedule training with a certified trainer, or visit **www.easydental.com** for other training options and on-demand content.

To install Easy Dental 2009 you will need the activation number that was included. If you have lost or misplaced the card please visit:

www.easydental.com/support/activation

or contact support:

1.800.593.2814

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