

easydental[®]
 2010

easy to use. easy to own.

Release Guide Easy Dental 2010

November 2010

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Easy Dental and Microsoft Windows

Easy Dental operates in a graphic environment called Microsoft Windows, created by Microsoft Corporation. Microsoft Windows gives a standard look and feel to Easy Dental and all other Windows applications. To run Easy Dental and Microsoft Windows, you need to license and install Microsoft Windows

Easy Dental and Microsoft Word

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.

Table of Contents

Easy Dental 2010 Release Guide	2
Easy Dental 2010 New Features	3
Treatment Manager	5
Collections Manager	6
The Hover Window	7
Enhanced Easy Dental Help	8
Scheduling Events	10
Enhanced Schedule View Report	10
Patient Social Security Numbers	11
Send Message	11

Easy Dental 2010 Release Guide

The Easy Dental 2010 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 to Easy Dental 2010, this Release Guide describes the new features in Easy Dental 2010.

For more information about the features listed in this guide, refer to the Easy Dental 2010 User's Guide (available for download at www.EasyDental.com).

Easy Dental 2010 New Features

Easy Dental 2010 contains several major enhancements and new features. The following enhancements and new features are illustrated and described in more detail in this guide:

- **Treatment Manager:** Take advantage of the potential income of patient treatment plans by quickly generating a contact list of patients who meet certain criteria specified by you.
- **Collections Manager:** Increase your practice's revenue by decreasing your accounts receivables. You can contact patients with outstanding balances and access all information for accounts including aged balance, payment information, Contacts entries, insurance estimates, and payment agreements.
- **Hover window:** Display additional patient information and appointment notes when you move the mouse pointer over a scheduled appointment or event in the Schedule.
- **Enhanced Easy Dental Help:** Need help using a particular Easy Dental feature? Try out the new Help system for Easy Dental 2010. We've added several enhancements to the Easy Dental Help, including an integrated Help table of contents and index, full-text search capabilities and search options, an introduction to all Easy Dental components, and links to other support and learning resources. These are just a few of the more significant enhancements that make Easy Dental Help easier to use.
- **Enhancements to the Schedule Clipboard:** Store and move multiple appointments and events to and from the Schedule Clipboard. View a list of all appointments and events that are on the Schedule Clipboard. Schedule operatories to be closed for a specified date and time to accommodate meetings and other events.
- **The Schedule View report:** Set up saved views, print all appointments for a specific week, and specify the number of copies you want to print.
- **Patient Social Security numbers:** Hide or mask your patients' Social Security numbers in the Preferences window.

Easy Dental 2010 New Features (continued)

- **Contacting patients:** Send e-mail to selected patients quickly and easily from Patients, Schedule, Treatment Manager, and Collections Manager.

Note: Inventory Manager is no longer supported as of the Easy Dental 2010 release.

The list below contains the fixes that have been included in the Easy Dental 2010 release:

- When sending a claim electronically and attempting to print or preview the Transmission Report, the message "There are no items to display" would appear. This has been fixed.
- Uninstalling Easy Dental 2008 or 2009 on an upgraded database would cause problems when reinstalling the software. This has been fixed.

Treatment Manager

The Treatment Manager generates a list of patients with treatment plans that meet certain criteria that you specify. Using this contact list to contact patients can help you realize the potential revenue that often sits untapped in patient treatment plans. Taking advantage of that revenue source can be a cost-effective way to increase your practice's bottom line.

1. From the Schedule toolbar, click **Treatment Manager**.
2. From the **Treatment Manager View** dialog box, click **OK** to accept the default view.
3. From the Treatment Manager toolbar, click Auto Dial to contact selected patients by telephone.
4. From the Treatment Manager list, double-click the name of the patient you want to schedule an appointment for.
5. In the **Family Appointment List** dialog box, click **Create New Appt** and enter the information for the appointment.

Treatment Manager View

Select Patient
From: <ALL> To: <ALL>

Select Billing Type: All Billing Types
1: Standard Billing - finance charges
2: Standard Billing - no finance charges
3: No Insurance
4: Insurance Family - Dual Insurance
5: Insurance Family - finance charges
6: Payment Plan - finance charges

Patient Age: From: <ALL> To: <ALL> Patient Status: All Non-Patient Inactive

Insurance
Insurance Coverage: All
No Insurance
Primary
Secondary
Primary w/o Secondary

For Patients with Primary Insurance
Benefit Renewal From: <ALL> To: <ALL> Min Benefit Rem: 0.00
Insurance Carrier: From: <ALL> To: <ALL>

For Patients with Secondary Insurance
Benefit Renewal From: <ALL> To: <ALL> Min Benefit Rem: 0.00
Insurance Carrier: From: <ALL> To: <ALL>

Treatment Plan
Dated From: <ALL> To: <ALL>
Min TP Total: 0.01
Min TP Ins Est: 0.00
Procedure Code: From: <ALL> To: <ALL>

Next Appt
Dated From: <ALL> To: <ALL>
Appt Reason: All Type: All
With TP: ASAP
With REC: Fixed
Both TP&REC: Open

Unscheduled Appts
 All
 With an Unsched Appt
 Without an Unsched Appt

Contacts
 Previous Entry Before: 07/03/2010

Show Columns...
 Show Totals

OK
Cancel
Help

2

Treatment Manager

Search, Print, Refresh, Add, Remove, Filter, Sort, Auto Dial

* Patient	Last TP	TP Total
* Brown, Mary	01/02/2009	35
* Cosbu, Brent L.	01/02/2009	7
* Little, Carol	01/02/2009	749.00
* Little, Dean	01/02/2009	749.00
* Reeves, Joshua	01/02/2009	2346.00

Treatment Plan
D2750 Porcelain/HM Crown 19

Appt. Create New Appt

3

4

5

To learn more about the Treatment Manager

Consult the Easy Dental 2010 Help system, 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.

Collections Manager

The Collections Manager enables you to quickly access and then act upon collection information. Based on the criteria you select, the Collections Manager generates a contact list of accounts. From this list you can access all the information for an account, including aged balance, payment information, Contacts entries, and insurance estimates.

1. From the Reports toolbar, click Collections Manager.
2. From the **Collections Manager View** dialog box, click **OK** to accept the default view.
3. From the Collections Manager list, select the name of the patient whose account details you want to view.
4. From the Collections Manager toolbar, click Auto Dial to contact the selected patient by telephone.



To learn more about the Collections Manager

Consult the EasyDental 2010 Help system, 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.

The Hover Window

The Hover window lets you view additional event, patient, and appointment information without double-clicking an event or an appointment. The Hover window combines information contained in the **Appointment Information** and **Patient Information** dialog boxes. You can modify how quickly the Hover window appears or disable it entirely.

1. In the Schedule window, place your mouse pointer over a partial-day event or an appointment.
2. To disable the Hover window or to modify how quickly it appears, from the Schedule toolbar, click Setup and select **Practice Setup** from the menu.
3. From the **Practice Schedule Setup** dialog box, clear the **Display Hover window** check box to disable the Hover window, or select a time in the **Delay Hover window after** box to modify how quickly the Hover window appears.



Davis, Emily

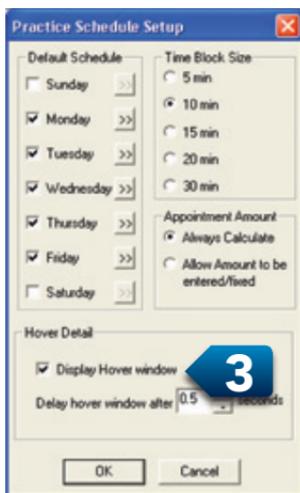
 Ext:val 0005/2000
0:00am - 9:00am
0051 - Dennis Smith

Home Phone: 797-1530
Work Phone:
Mobile Phone:
E-Mail:
Chart #: 040003
Insurance Plan: Principal Financial Group
Referred By:
Account Balance: 0.00

OP-1 - Amount: \$91.00
Type: General
Schedule: F2ED
Status: <none>

11/30/1989
20 - Female

Appt Notes:



Practice Schedule Setup

Default Schedule

Sunday >>>

Monday >>>

Tuesday >>>

Wednesday >>>

Thursday >>>

Friday >>>

Saturday >>>

Time Block Size

5 min

10 min

15 min

20 min

30 min

Appointment Amount

Always Calculate

Allow Amount to be entered/tixed

Hover Detail

Display Hover window

Delay hover window after 0.5 seconds

3

OK Cancel

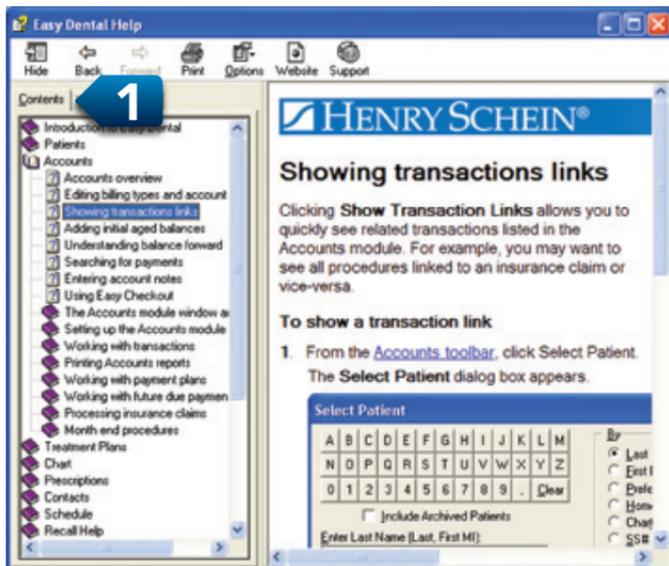
To learn more about the Hover Window

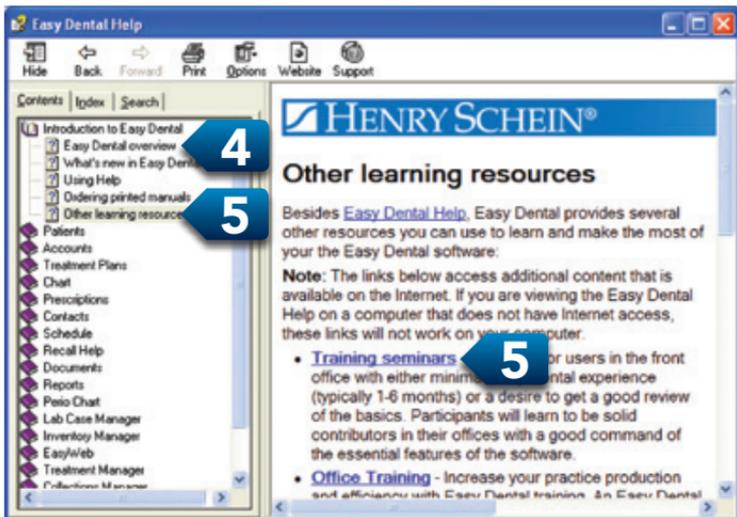
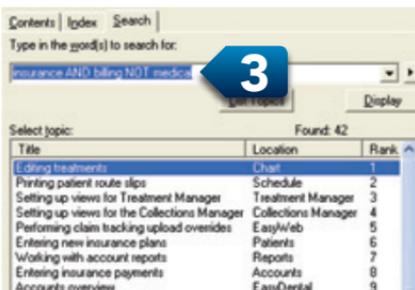
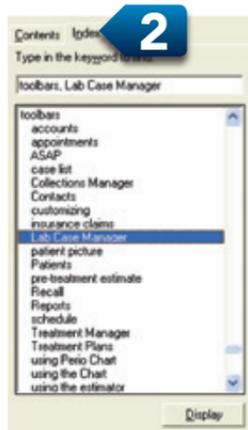
Consult the Easy Dental 2010 Help system, call 1-800-824-6375 to schedule training with a certified trainer, or visit www.EasyDental.com for other training options and on-demand content.

Enhanced Easy Dental Help

The new Easy Dental 2010 Help system includes several enhancements that make Easy Dental Help easier to use. These enhancements include the following:

- 1. Integrated Help table of contents.** Easy Dental previously provided over 15 separate Help systems for the individual Easy Dental modules (such as Accounts Help and Chart Help). The new Easy Dental Help integrates all the separate Help windows into a single Easy Dental Help system with a comprehensive table of contents, making it easy to navigate and use all the Easy Dental Help from one window.
- 2. Integrated Help Index.** The new Help system also provides an integrated index with entries for all Easy Dental modules.
- 3. Full-text search capabilities and additional search options.** You can now use the Search tab to perform a full-text search of the entire Easy Dental Help. (Previously, the search was limited to the Help module you had open.)
- Several full-text search options have also been added. For example, you can use search operators, such as "AND," "OR," and "NOT," to create search strings that will yield precisely the information you want. You can search topic titles only or the entire Help contents.
- 4. Easy Dental overview.** This new Help topic provides a brief overview of all the Easy Dental components and add-ons.
- 5. Links to other support and learning resources.** By clicking the "Other learning resources" topic, you can read information about other Easy Dental support and learning resources. Hyperlinks take you directly to the Web pages on EasyDental.com where these resources and services are explained. (Internet connection required.)





To learn more about the Help Menu

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.

Scheduling Events

You can schedule an event (a non-patient “appointment”) to block out time in the Schedule module to close an operator for a day or up to a year. Events can include such items as staff meetings, vacation schedules, or holidays.

1. From the Schedule toolbar, click Schedule Event.
2. Under **Event Time** in the **Schedule Event** dialog box, select a start and end time for your event or click **Close Operatory (All Day Event)**.
3. Under **Operatories**, select the operatory or operatories that you want to schedule the event for.
4. Under **Event Days**, select the day or days the event will occur.
5. Enter a description of the event in the **Description** text box.
6. Click **Event Color** to select a background color for the event from the **Color** palette.
7. Enter any notes that apply to the event in the **Notes** text box.
8. Click **OK**, and then from the Schedule toolbar, click Refresh. The event appears in the Schedule.

The image shows a screenshot of the "Schedule Event" dialog box. The dialog box is titled "Schedule Event" and has a close button (X) in the top right corner. It contains several sections:

- Event Time:** Includes "Start" and "End" date pickers, and a checkbox for "Close Operatory (All Day Event)".
- Event Days:** Includes "Start" and "End" date pickers, a "Select Days of the Week" section with checkboxes for Sunday through Saturday, and a "Clear All" button.
- Description:** Includes a text box for "Event" and a checkbox for "Center Description on Scheduled Event".
- Operatories:** A list box containing "OP-1", "OP-2", and "OP-3", with "OP-1" selected. There is also an "All" checkbox.
- Event Color:** A color selection button.
- Notes:** A text area for notes, with an "Insert Dateline" button.

Numbered callouts (2-8) point to the following elements:

- 2: Event Time section
- 3: Operatories list
- 4: Event Days section
- 5: Description text box
- 6: Event Color button
- 7: Notes text area
- 8: OK button

NOTE: If multiple operatories and/or days are specified for the Event, separate Events (one per day per operatory) will be created/displayed in the Schedule. The Event creation process may take several minutes depending on the criteria specified.

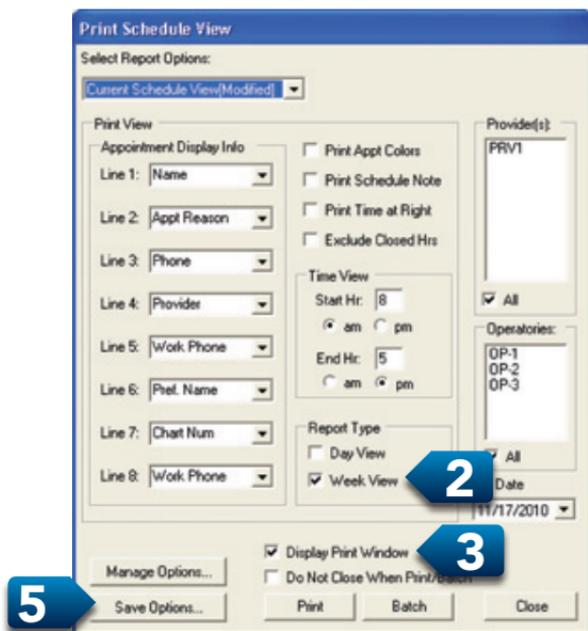
To learn more about Scheduling Events

Consult the Easy Dental 2010 Help system, 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.

Enhanced Schedule View Report

You can set up saved views that you can select as needed, set a view as the default for the next time you use that Print Schedule View, print all appointments for a selected week, and specify the number of copies you want to print.

1. From the Schedule toolbar, click **Print**, and then from the menu, select **Print Schedule View**.
2. From the **Print Schedule View** dialog box, select **Week View**.
3. To print more than one copy of the Schedule, select **Display Print Window** and click **Print**.
4. From the **Print** dialog box, select the number of copies you want to print and click **OK**.
5. To save your modifications to the Schedule view, click **Save Options**, and from the **Save Options** dialog box, enter a name for the modified view, and click **OK**.



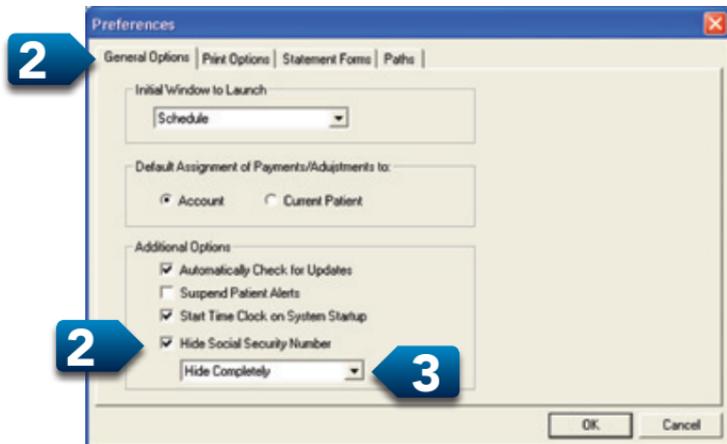
To learn more about the Enhanced Schedule View report

Consult the EasyDental 2010 Help system, 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.

Patient Social Security numbers

Easy Dental helps you protect your patients' privacy by hiding or masking their Social Security numbers on patient information forms, billing statements, and other documents.

1. From the Reports toolbar, click Maintenance and from the menu, select **Preferences**.
2. From the **Preferences** dialog box, on the **General Options** tab, click **Hide Social Security Number**.
3. From the list, select **Hide Completely**, **Mask Completely**, or **Mask All but Last 4 Numbers** and click **OK**.



Send Message

Send e-mail messages quickly and easily using Easy Dental's Send Message feature in the Patients, Schedule, Treatment Manager, and Collections Manager modules. In order to use Send Message, you must have a MAPI-compliant e-mail system, such as Outlook, Outlook Express, or Eudora set up on the computer you're sending the message from.

1. Select a patient.
2. From the Patients, Schedule, Treatment Manager, or Collections Manager toolbar, click Send Message.
3. Enter your message and click **Send**.
Note: You must have your e-mail program open before clicking Send Message.

To learn more about hiding or masking a patient's Social Security number, or sending a message

Consult the Easy Dental 2010 Help system, 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.



www.EasyDental.com

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