

Easy Dental 12.1

Release Guide

PUBLICATION DATE

October 2018

COPYRIGHT

© 1987 – 2018 Henry Schein One. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrievable system, or translated into any language in any form by any means without the written permission of Henry Schein One.

LICENSES AND TRADEMARKS

© 1987 – 2018 Henry Schein One, the Henry Schein One logo, and Easy Dental are registered trademarks of Henry Schein One. Microsoft, Excel, Windows, and Word are registered trademarks of Microsoft Corporation. All ADA CDT codes are protected by U.S. and International copyright laws. All rights reserved by the American Dental Association. Portions copyright 1992-2018 FairCom Corporation. "FairCom" and "c-treeACE" are trademarks of FairCom Corporation and are registered in the United States and other countries. All Rights Reserved.

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.

Contents

Easy Dental 12.1.....	1
Overview and New Features.....	2
New Features and Changes.....	2
Using the New Features and Enhancements	2
Document Center	2
CareCredit	7
Easy Dental 12.1 Software Changes and Fixes	10
Easy Dental 12.....	1
Overview and New Features.....	2
New Features and Changes.....	2
Using the New Features and Enhancements	3
Patient Banner.....	3
Quick Search	3
Settings Button	4
DPI Scaling	5
Customizing the Modules Toolbar	6
Easy Dental 12 Software Changes and Fixes	6

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 Enhancements” 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

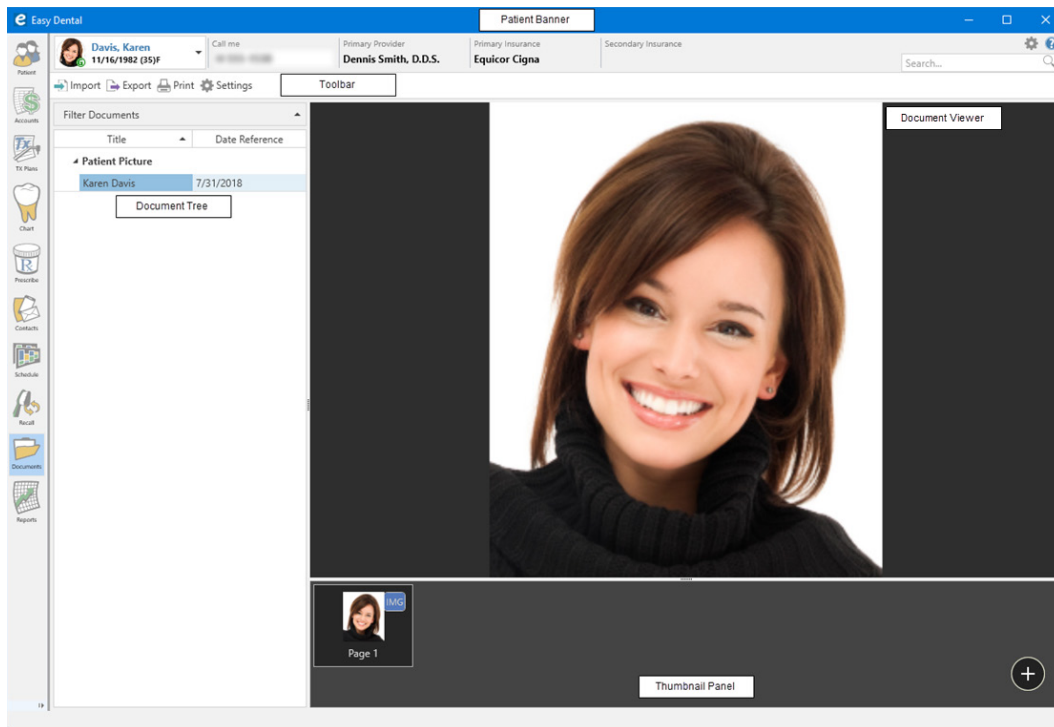
The following information will help you understand how to use the features and enhancements in this release.

Document Center

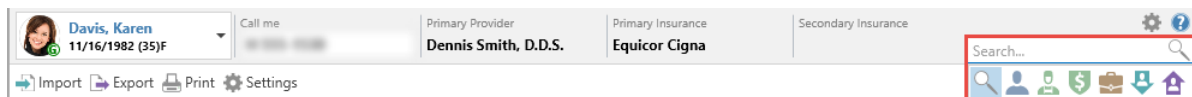
The Document Center window consists of the following areas:








- **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.

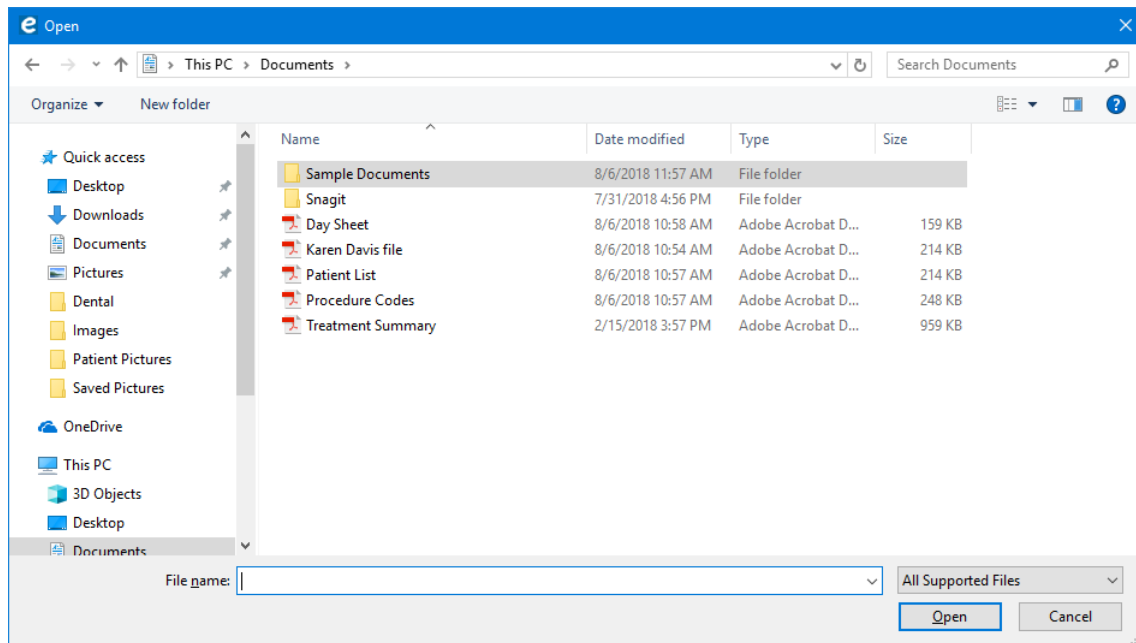
IMPORTING DOCUMENTS

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.

New Document Information

Title *
Treatment Summary

Reference Date *
8/2/2018

Folder *
Correspondence

Document Tags *
Davis, Karen + Add Tag

Notes

Orientation <None>

Treatment Summary.pdf

OK Cancel

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**.

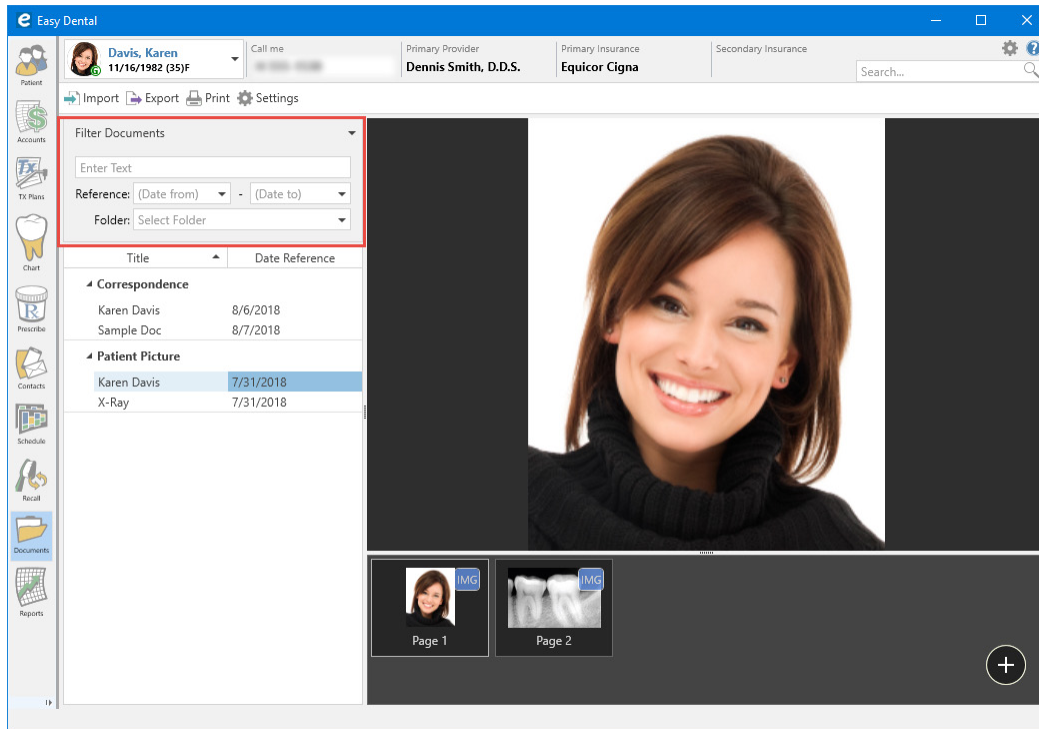
- **Notes** – To add a note, type one in the box.
 - **Orientation** – To change the document's orientation, select one from the list.
4. Click OK.

FILTERING DOCUMENTS

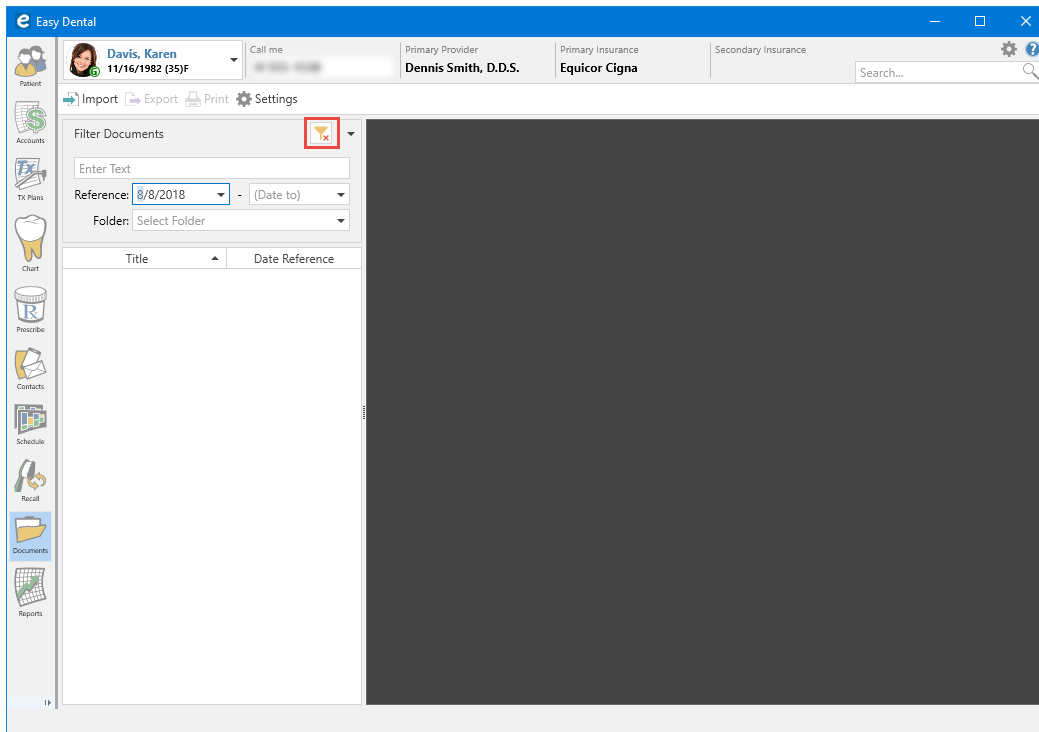
You can view attached documents by patient, provider, insurance carrier, and referral source. You can select filters to view documents within a specific date range and assigned to a particular folder.

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.

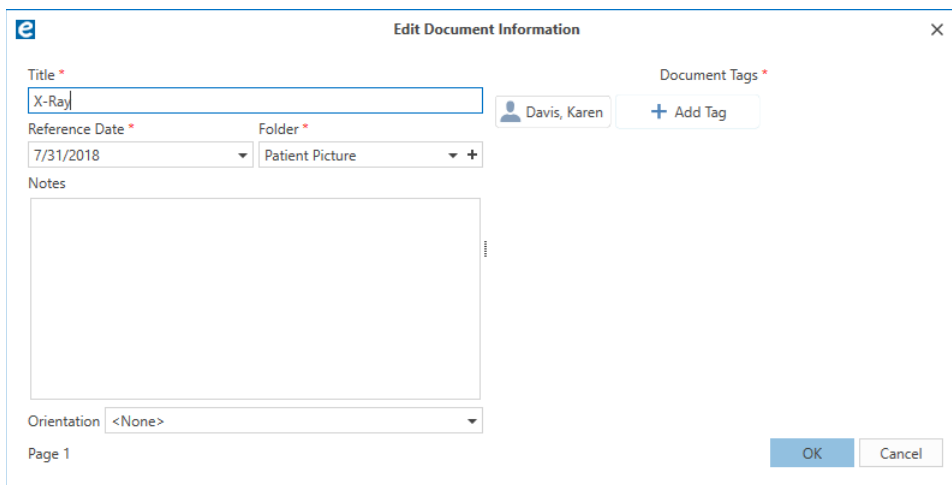


ADDING DOCUMENT TAGS TO DOCUMENTS

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 'Title' field contains 'X-Ray'. The 'Reference Date' is '7/31/2018' and the 'Folder' is 'Patient Picture'. The 'Document Tags' section is highlighted with a red box, showing a search bar and several icons representing different tags like a person, a dollar sign, and a house. The 'Orientation' is set to '<None>' and the page is 'Page 1'. 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. The 'Title' field contains 'X-Ray'. The 'Reference Date' is '7/31/2018' and the 'Folder' is 'Patient Picture'. The 'Document Tags' section now shows two tags: 'Davis, Karen' and 'Aetna'. The 'Aetna' tag is highlighted with a red box. There is an '+ Add Tag' button next to the tags. The 'Orientation' is set to '<None>' and the page is 'Page 1'. There are 'OK' and 'Cancel' buttons at the bottom right.

CareCredit

CareCredit is a credit card that your patients can use to pay for their out-of-pocket dental expenses. Promotional financing is available for up to 60 months* on qualifying purchases of \$200 or more with a patient's CareCredit credit card account.

*Subject to credit approval. Minimum monthly payments required. See CareCredit.com for details.

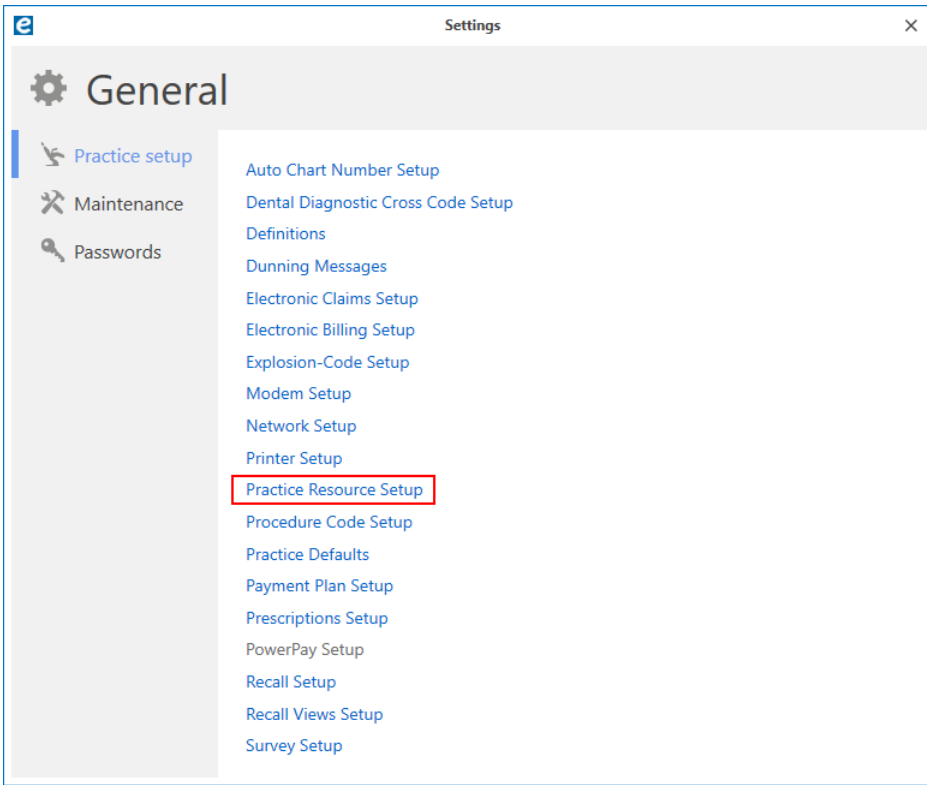
SETTING UP CARECREDIT

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.

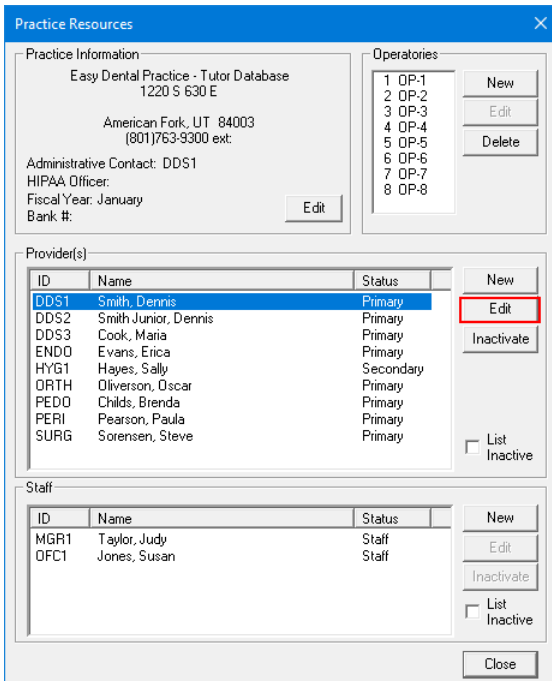
For more information on using CareCredit with Easy Dental, see "CareCredit Overview" in the Easy Dental Help.

To set up CareCredit

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



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



3. 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 1-4 OP-1 to OP-4, Class (Primary/Secondary radio buttons).
- Care Credit:** Merchant ID (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 IDs:** 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.

LOOKING UP ACCOUNTS, PRINTING RECEIPTS, SUBMITTING APPLICATIONS, AND CHECKING APPLICATION STATUS

You can also locate an account or print a receipt and submit applications for patients or check their application status.

To look up accounts, print receipts, submit applications, and check application status

1. Select the appropriate patient in the Patient Banner.
2. Click the CareCredit toolbar button to open the CareCredit portal, and complete the appropriate task.

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.
- Users 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 users 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 users frequently moved appointments and the database contained multiple events, the Schedule stopped responding. This has been fixed.
- If users 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 users 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 users 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 users 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 Enhancements” 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 interface includes a top navigation bar with patient details, a ribbon toolbar, and a main content area with a table and detailed patient information.

Easy Dental | Patient: **Edwards, Johnny** | Call me: **H 555-7101** | Primary Provider: **Erica Evans, D.D.S.** | Primary Insurance: **Prudential** | Secondary Insurance: **Principal Financial Group** | Find Patient...

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) | **Consent:** 01/05/2012 | **Chart #:** ED0001
Address: 3717 Slemis Street | **First Visit:** 01/05/2012 | **SS#:**
 American Fork, UT 84003 | **Last Visit:** 01/05/2012 | **DL#:**
Phone: H 555-7101 | **Missed Appt:** 02/01/2012, 6 | **Birthdate:** 07/14/1963, 54
Status: Active, M, Married, Guar, Ins, H-of-H | **E-Mail:** | **Provider:** ENDO
Fee Sched: <Prov Default>

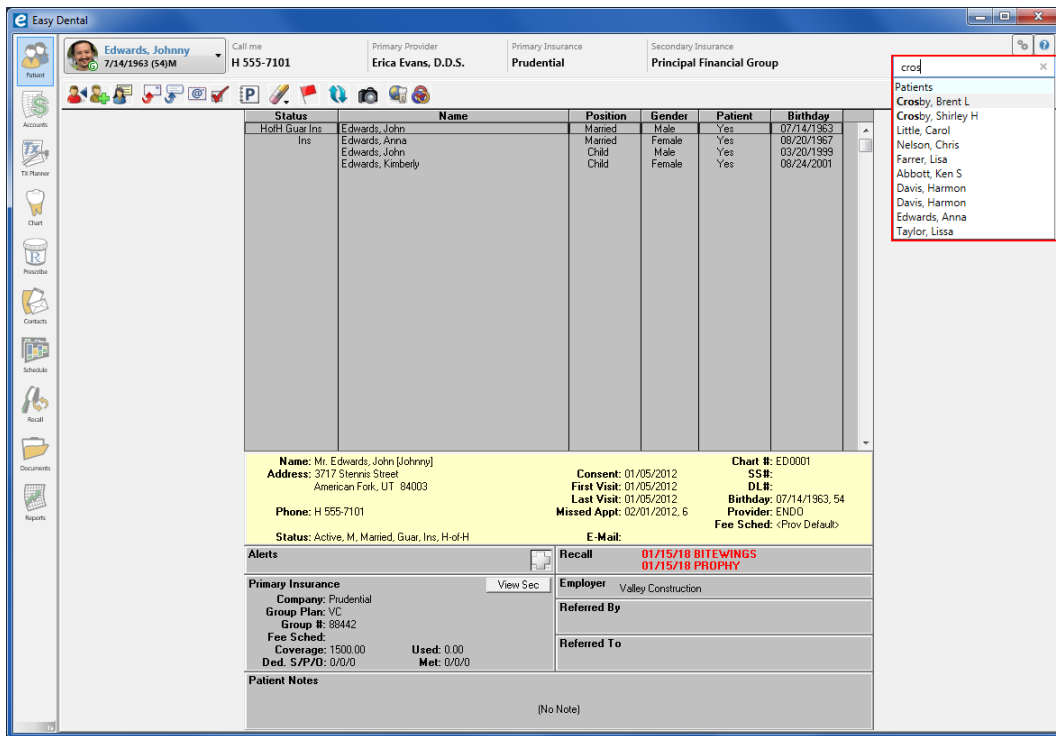
Alerts | **Recall:** 01/15/18 BITEWINGS
01/15/18 PROPHY

Primary Insurance: Prudential | **Employer:** Valley Construction
 Group Plan: VC | **Referred By:**
 Group #: 88442 | **Referred To:**
Fee Sched: | **Coverage:** 1500.00 | **Used:** 0.00
Ded. S/P/D: 0/0/0 | **Met:** 0/0/0

Patient Notes
(No Note)

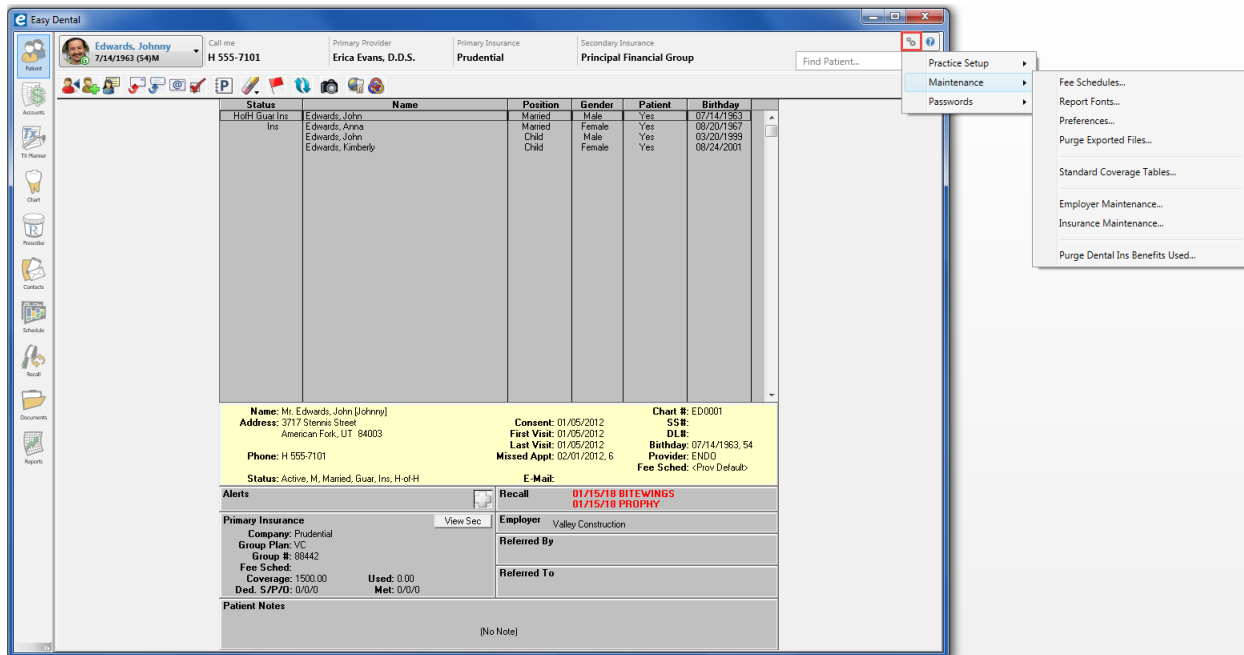
Quick Search

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

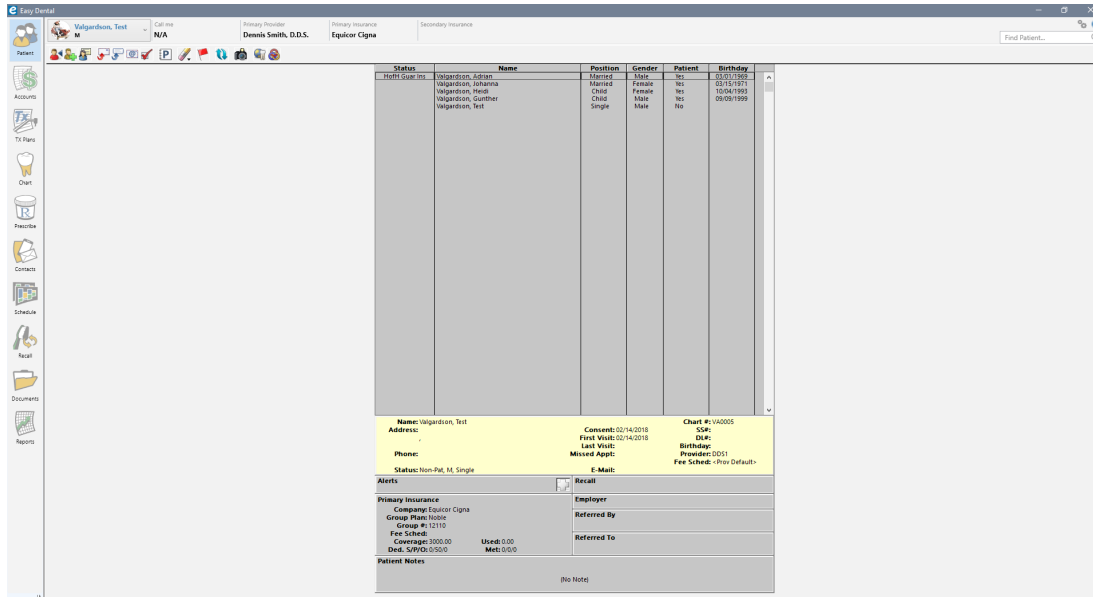
By clicking the Settings button, you can set up your practice, perform maintenance tasks, and set up passwords without having to open the Reports module.



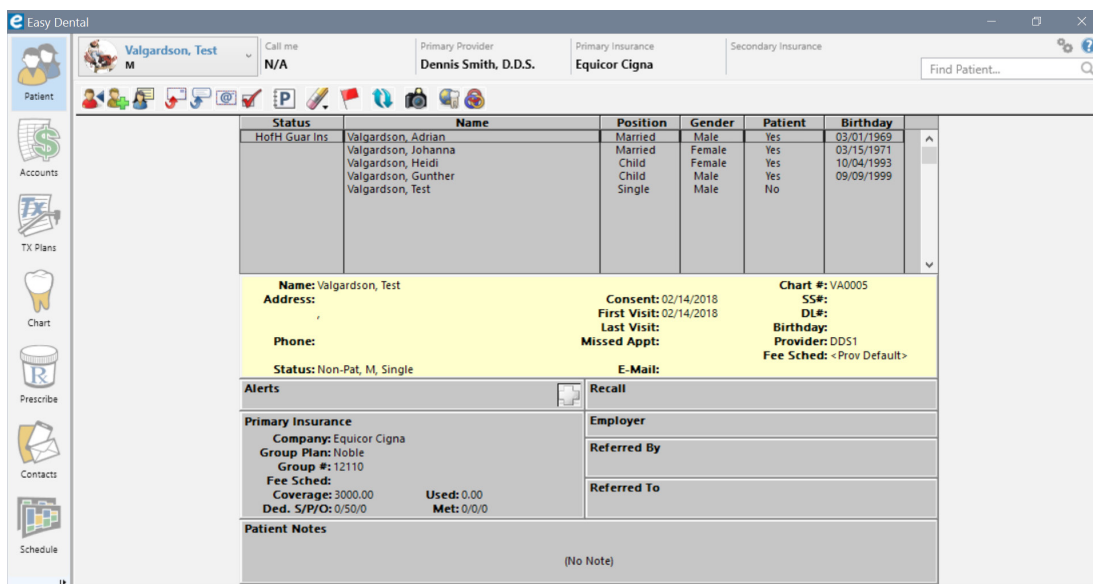
DPI Scaling

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



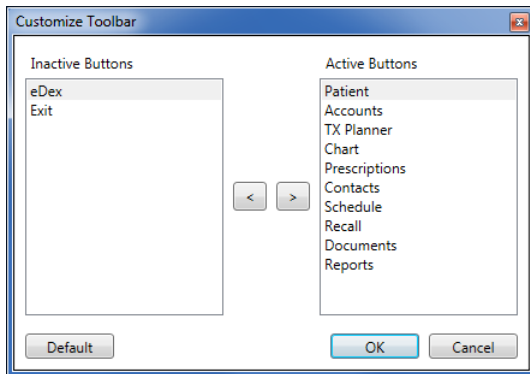
Customizing the Modules Toolbar

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.

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.

