

Easy Dental 11

Release Guide

Easy Dental 11.3

Easy Dental 11.2

Easy Dental 11 Productivity Pack 1

Easy Dental 11

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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 11.3

Overview and New Features

This Easy Dental 11 Release Guide provides information about the Easy Dental 11.3 software release and previous software releases back to version 11. This overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Easy Dental 11.3.

Note: For information about using the new features in Easy Dental 11.3, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Easy Dental 11.3?” in the Easy Dental Help.

New Features

Easy Dental 11.3 includes the following new features and enhancements:

- **Patient Visit Form** – You can use a new customizable Patient Visit Form to provide comprehensive patient information to providers and office staff during the patient’s visit. The new Patient Visit Form is similar to the Patient Route Slip, but is organized differently and is highly customizable.
- **Fee Schedule Maintenance** – You can now set up and maintain fee schedules from one place. You can edit, copy, and rename fee schedules. You can also export and import a fee schedule to and from a text editor or a spreadsheet as a comma delimited (.csv) file or as an .xls or .xlsx file. To learn more, refer to “Setting Up Fee Schedules” in the Easy Dental Help.
- **Accounts module enhancements** – Several enhancements were made to the Accounts module, including new columns (entry date, surfaces, check #), adjustable column widths that are automatically saved when you close the Accounts module, the ability to sort by and hide columns, a note indicator for payments and adjustments that have a note, tooltips for the column headings, alternate row shading, and a Refresh button on the toolbar.
- **ePrescribe enhancements** – Improvements have been made to ePrescribe for adding users and updating state license and DEA information. Now, you can also use ePrescribe to prescribe controlled substances.
- **Third-party integration (Link API)** – Easy Dental now includes a feature enabled for third-party companies to develop a link and/or bridge between Easy Dental and their software applications. Links developed by third-party companies for Easy Dental using this new feature will be displayed on the easylink toolbar accessible from most Easy Dental modules from which you can select a patient.
- **New Jersey prescription form** – The New Jersey prescription form has been updated.

Using the New Features and Enhancements

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

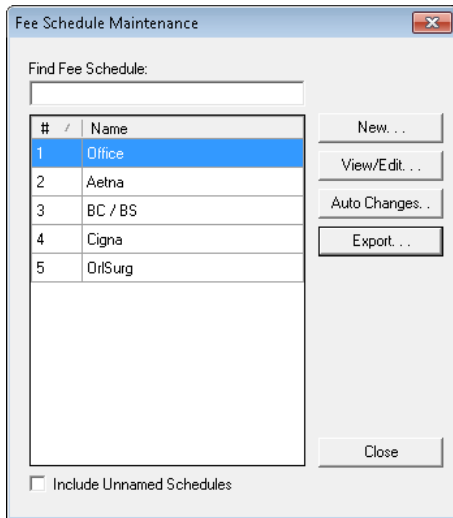
Reports

You can set up and maintain fee schedules from one place.

To set up a fee schedule

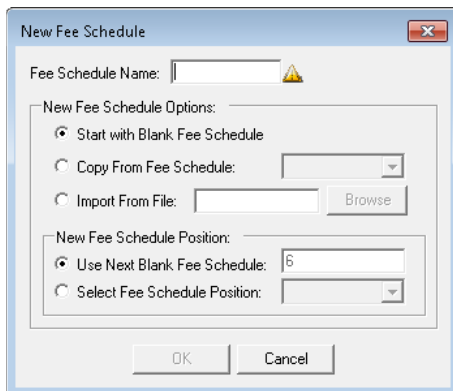
1. From the Reports toolbar, click Maintenance, and then from the menu, click **Fee Schedules**.

The **Fee Schedule Maintenance** dialog box appears.



2. Click **New**.

The **New Fee Schedule** dialog box appears.



3. Type a fee schedule name in the appropriate text box.

Note: We recommend that you add your practice's usual and customary fees to Fee Schedule #1. Fees are pre-assigned in Easy Dental.

4. Under **New Fee Schedule Options**, do one of the following:
 - **Start with Blank Fee Schedule** – Select to use a blank fee schedule.
 - **Copy From Fee Schedule** – Select, and then from the list, select the fee schedule that you want to copy.
 - **Import from File** – Select to import the fee schedule from a comma delimited (.csv) or Excel file. Select the appropriate file from the **Select file to import** dialog box.
5. Under **New Fee Schedule Position**, do one of the following:
 - **Use Next Blank Fee Schedule** – Select to use the next blank position in the fee schedule list.
 - **Select Fee Schedule Position** – Select, and then from the fee schedule list, select where you want the new fee schedule to be positioned.
6. Click **OK**.

The **View/Edit Fee Schedule** dialog box appears.

The dialog box titled "View/Edit Fee Schedule" contains a table with the following data:

Procedure Code	Fee #1 Office BEFORE	Fee #1 Office AFTER	Difference
20999	953.00	953.00	0.00
209999	5,977.00	5,977.00	0.00
64550	198.00	198.00	0.00
90620	583.00	583.00	0.00
95831	466.00	466.00	0.00
95868	5,564.00	5,564.00	0.00
97700	184.00	184.00	0.00
D0120	46.00	46.00	0.00
D0140	70.00	70.00	0.00
D0145	65.00	65.00	0.00
D0150	80.00	80.00	0.00
D0160	150.00	150.00	0.00

Buttons on the right: Clear, Clipboard, Copy From..., Copy To..., Export..., Import... Buttons at the bottom: Save, Close.

- Click **Save**.

Schedule

The Patient Visit Form is a route slip that you can customize to view or print for a certain patient or multiple patients. You can filter the forms that are generated by primary provider, appointment provider, operator, and appointment date. The form can include patient, family, account, recall, and insurance information; patient and family alerts; patient and account notes; treatment-planned procedures; and future appointments.

To print a patient visit form

- Select the appointment that you want to print a Patient Visit Form for.
- From the Schedule toolbar, click Print Patient Visit Form.

The **Patient Visit Form** dialog box appears.

The dialog box titled "Patient Visit Form" contains the following sections:

- Select Patient:** Radio buttons for "All Patients" (selected) and a search button ">...".
- Select Primary Provider:** From: <ALL> To: <ALL>
- Select Appointment Provider:** From: <ALL> To: <ALL>
- Select Operator:** From: <ALL> To: <ALL>
- Appointment Date:** From: 11/04/2014 To: 11/04/2014
- Select Report Options:**
 - ☒ Include Detailed Patient Information
 - ☒ Include Patient's Continuing Care
 - ☒ Include Patient Alerts
 - ☒ Include Patient Notes
 - ☐ First Line Only
 - ☒ Include Referral Information
 - ☒ Include Account Information
 - ☒ Include Guarantor Account Note
 - ☐ First Line Only
 - ☒ Include Treatment Plan Procedures
 - ☒ Scheduled for this Appointment
 - ☐ All for Patient
 - ☒ Include Insurance Information
 - ☒ Primary Dental
 - ☒ Detailed
 - ☐ Brief
 - ☒ Secondary Dental
 - ☒ Detailed
 - ☐ Brief
 - ☒ Include Family Information
 - Select First CC To Include For Family: <NONE>
 - Select Second CC To Include For Family: <NONE>
 - Select Third CC To Include For Family: <NONE>
 - ☒ Include Patient's Future Appointments

Buttons at the bottom: ☐ Save As Default ☐ Do Not Close When Preview/Print/Batch Preview Send To Batch Print Close

- Set up the following options:
 - Select Patient** – Select the type of patient that you want to print a visit form for.

- **Select Primary Provider** – Prints forms for patients according to their primary providers.
 - **Select Appointment Provider** – Prints forms for patients who are scheduled to see certain providers only.
 - **Select Operatory** – Prints forms for patients who have appointments in certain operatories only.
 - **Appointment Date** – Prints forms for patients who have appointments within a certain date range only.
4. Select or clear the following options:
- **Include Detailed Patient Information** – A section on the form with information from the Patient Information block of the Patients module, such as contact numbers, address, and primary and secondary providers.
 - **Include Patient's Recall** – A section on the form with the Recall types assigned to the patient.
 - **Include Patient Alerts** – A section on the form with the patient's alerts.
 - **Include Patient Notes** – A section on the form with the patient's notes. To restrict the note to the first line, select **First Line Only**.
 - **Include Referral Information** – A section on the form with the patient's referral information.
 - **Include Account Information** – A section on the form with the patient's account information, such as the guarantor's name, billing type, last insurance payment details, last guarantor payment details, date the last statement was sent, and family balance.
 - **Include Guarantor Account Note** – A section on the form with the account notes for the patient's family. To restrict the note to the first line, select **First Line Only**.
 - **Include Treatment Plan Procedures** – A section on the form with the patient's treatment-planned procedures.
 - **Include Insurance Information** – A section on the form with the patient's insurance information.
 - **Include Family Information** – A section on the form with Recall information for each of the patient's family members (excluding those with an "Archived" status).
 - **Include Patient's Future Appointments** – A section on the form with the appointment information for each of the patient's future appointments.
5. Select **Do Not Close When Preview/Print/Batch** if you want the **Patient Visit Form** dialog box to remain open when you preview, print, or batch the form.
6. Select **Save As Default** to save the currently selected report options, except **Select Patient** and **Select Primary Provider**, for the next time you generate the form.
7. Do one or more of the following:
- **Preview** – Click to preview the forms before printing.
 - **Send To Batch** – Click to send the forms to the Batch Processor to be viewed or printed at a later time.
 - **Print** – Click to send the forms to the default printer.
8. If you selected **Do Not Close When Preview/Print/Batch** when you generated the last form and you have finished generating forms, click **Close**.

Accounts

Several enhancements were made to the Accounts module, including new columns (entry date, surfaces, check #), adjustable column widths that are automatically saved when you close the Accounts module, the ability to sort by and hide columns, a note indicator for payments and adjustments that have a note, tooltips for the column headings, alternate row shading, and a Refresh button on the toolbar.

The transaction log

Date	Name	Surface	Tooth	Check #	Code	*	Description	N	D	Amount	Prov	Ins	Balance
02/01/2012	Brent L Crosby				D0120		Periodic Evaluation	♪		46.00	DDS1	No	46.00
02/01/2012	Brent L Crosby				D0274		Bitewing Four Films	♪		59.00	DDS1	No	105.00
02/01/2012	Brent L Crosby				D1110		Prophylaxis - Adult	♪		85.00	DDS1	No	190.00
10/10/2014	Brent L Crosby	M	4		D2140		Amalgam 1 Surface	♪		127.00	DDS1		317.00
10/10/2014	Brent L Crosby				Pay		Cash Payment - Thank You			-25.00	DDS1		292.00
10/10/2014	Brent L Crosby				Pay		Insurance Payment			-101.00	DDS1		191.00
10/10/2014	Brent L Crosby				Ins		Pr Dental Claim - Rec'd 127.00						191.00

The transaction log or accounts list contains the following items:

- **Date** – The transaction date.
- **Name** – The patient or guarantor name.
- **Surface** – The surface letter or letters when applicable.
- **Tooth** – The tooth number when applicable.
- **Check #** – The check number.
- **Code** – The procedure code or transaction type.
- ***** – An asterisk in this column indicates that the transaction has been moved to history. You cannot edit or delete transactions in history. A plus sign + indicates that the procedure has been invalidated. Invalidated procedures still show in the Accounts module but no longer display in the Patient Chart. A carat ^ indicates that the procedure has been back-dated to a month that has been closed out. When the procedure is moved to history, the carat ^ changes to an asterisk *.
- **Description** – A description of the transaction.
- **N** – A musical note indicates that a note is attached to a procedure.
- **D** – The letter “D” indicates that the procedure has diagnoses attached to it.
- **Amount** – The transaction amount.
- **Prov** – The provider of each transaction.
- **Ins** – Insurance status (whether or not an insurance claim has been created). The insurance status column either has no entry or the word “No” listed. If the column is empty, an insurance claim has been filed for the procedure. If the column reads “No,” create an insurance claim. If this column has an “x,” the procedure is marked “Do Not Bill to Insurance.”
- **Balance** – Account or patient running balance (when selected).

Easy Dental 11.3 Software Changes and Fixes

The following list contains descriptions for the fixes included in Easy Dental 11.3:

Accounts

- Pressing the Enter key to advance to the next line in the **Note** text box caused the **View Procedures Attached to an Insurance Claim** dialog box to close. This has been fixed.
- Procedure codes with long IDs could not be selected or edited. This has been fixed.
- Future Due Payment Plan coupons did not print correctly on pre-printed forms. This has been fixed.
- Changing a procedure code's **Completion Date** to a date prior to the **Start Date**, clearing the **Start Date**, or clicking **Change** when the completion and start dates are blank cleared the procedure from the **Procedure List** in the **Enter Procedure(s)** dialog box. This has been fixed.
- After entering a note in the **Insurance Claim Status** dialog box, an error message incorrectly appeared. This has been fixed.
- Could select and post diagnostic codes in Accounts. This has been fixed. A message now appears stating that a Condition and/or Diagnostic Code will only appear in Chart.
- Fee totals did not match claim totals. This has been fixed.

Chart

- Could not paint multiple surfaces on posterior teeth. This has been fixed.
- The paintings for abutments within a bridge were not being painted correctly. This has been fixed.

Collection Manager

- Pressing Alt + V does not reopen the **Collection Manager View** dialog box. This has been fixed.
- Pressing Alt + P does not open the **Print** menu. This has been fixed.
- Pressing Alt + I does not hide the selected patient. This has been fixed. (WI# 15788)
- Pressing Alt + Q does not open Quick Letters. This has been fixed.
- Pressing Alt + = does not open Quick Labels. This has been fixed.
- Pressing Alt + 7 does not open Send Message. This has been fixed.
- Pressing Alt + PS does not open the **Patient Survey** dialog box. This has been fixed.
- Pressing Alt + A does not open the **Auto Dial** dialog box. This has been fixed.
- Pressing Alt + G does not open the **Billing/Payment Plan Information** dialog box. This has been fixed.
- Pressing Alt + N does not open the **Account Notes** dialog box. This has been fixed.
- Pressing Alt + X does not open the **Patient Alerts** dialog box. This has been fixed.
- Pressing Alt + R does not refresh the Collections Manager window. This has been fixed. (WI# 15798)
- Pressing Alt + 3 does not open the **Patient Picture** dialog box. This has been fixed.
- Pressing Alt + 2 does not open the EasyWeb toolbar. This has been fixed.
- Pressing Alt + 5 does not open the Easy Link toolbar or splash screen. This has been fixed.

- Pressing Alt + H does not open the **Help** menu. This has been fixed.
- The Patient Survey tooltip was incorrect. This has been fixed.

Contacts

- Selecting **All** in the **View Filter** dialog box clears the check boxes instead of selecting them. This has been fixed.

eDex

- The Custom Note title bar text in eDex has been changed to eDex Note.
- When passwords were enabled could not open eDex if users did not have the rights to open Practice Analysis. This has been fixed.
- Could not remove the eDex icon from the Easy Dental toolbar. This has been fixed.
- Adding more than one contact entry for a patient in the same session of eDex caused an error message to appear stating that eDex had to be closed and re-opened to add a second entry. This has been fixed.
- If multiple patient records were open and a user opened a second Easy Dental module from eDex, that module opened for the first patient record open in eDex instead of letting user select a patient record from a list. This has been fixed.

Patients

- Pressing Alt + R refreshed the view in the Patients module even though a patient was not selected. This has been fixed.
- The **Employer Information** dialog box accepted invalid data in the **ST** and **Zip** text boxes. This has been fixed.
- When the **Last Update** text box in the **Insurance Information** dialog box was left blank, an error message was not returned. This has been fixed.
- The Patient Survey reported the last visit date for the head of household instead of the last visit date for the selected family member. This has been fixed. Alaska Medicaid rejected ED2007 and ED2012 claim formats because Box 27 had incorrect information. This has been fixed.

Perio

- Pressing Alt + H did not open the Help. This has been fixed.

Prescriptions

- The prescriber did not change in the Prescriber field in the **New Patient Prescription** dialog box even though the selected patient had a different primary provider from the previously selected patient. This has been fixed.

Recall

- Double-clicking a patient in the Recall list would not open the **Edit Recall** dialog box. This has been fixed.

Reports

- Removing the administrator rights from a user and changing his or her password incorrectly caused a warning message about recording the administrator's to appear. This has been fixed.
- Selecting Operatory Appointment List, Patient Route Slips, and Daily Appointment List showed an incorrect status for two of the three reports. This has been fixed.
- Cancelling the staff or provider inactivation process and then clicking **New** incorrectly filled the **Staff Information** or the **Provider Information** dialog box with the previous staff member's or provider's information. This has been fixed.
- Route Slips displayed archived patients. This has been fixed.
- After clicking the EasyWeb toolbar button, a runtime error appeared and the EasyWeb toolbar wouldn't load. This has been fixed.
- Characters in ADA codes having more than five characters were being cut off when the Fee Schedule Report was printed. This has been fixed.
- The copyright dates on the CA Full Sheet and CA Half Sheet prescription forms. This has been fixed.
- Selecting **Name to use for Provider** and then leaving the name text box blank incorrectly opened a message. This has been fixed.
- The zoom percentages in the **Print Preview** dialog box displayed documents inaccurately. This has been fixed.
- The default page size in the Preview Reports window changed randomly instead of retaining the last saved default page size. This has been fixed.
- Selected **Unscheduled Treatment Plans** from the **Schedule Reports** menu but could not print the **Detailed Report** and **Condensed Report** simultaneously. This has been fixed.
- Selecting **Retry Previous Submission** in the **Electronic Billing Submission** dialog box without having QuickBill set up caused the wrong error message to appear. This has been fixed.
- The Operatory Title text box in the **Operatory Information** dialog box would not save 20 characters. This has been fixed.
- The **Surface/Root Flags** dialog box would not open when the **Flags** button was clicked. This has been fixed.
- Patient name had an extra comma when the CAMED3 claim format was used. This has been fixed.

Schedule

- The Purge Unscheduled Appointments button incorrectly appeared in the toolbars of the ASAP List and Appointments windows. This has been fixed.
- Renamed or deleted operatories still appeared in the **Schedule New Appointment** dialog box. This has been fixed.
- Breaking an appointment caused the broken date to be blank in the Unscheduled List. This has been fixed.
- Clicking the Patient Alerts icon did not display the patient alert if the user selected **Do Not Display Again Today**. This has been fixed.
- After changing a treatment plan amount, the scheduled production amount in the **Month View** dialog box was incorrect. This has been fixed.
- After changing a treatment plan amount, the total production amount was incorrect in the Hover window. This has been fixed.

- Could not purge appointments that were broken in the Pinboard from the Unscheduled List. This has been fixed.
- Dragging an appointment from Schedule while using the shortcut keys to open a second Easy Dental module caused the appointment to remain “attached” to the cursor. This has been fixed.

Miscellaneous

- The End User License Agreement (EULA) for ePrescribe has been modified to include language for controlled substances.
- The patient filter in the **View** dialog box of the Lab Case Manager would not add a patient’s name to the To text box. This has been fixed.
- The Month End Setup Wizard incorrectly appeared in Easy Dental and prevented the Employer List from generating. This has been fixed.
- The Month End Setup Wizard option incorrectly appeared in the **Password - Setup Practice** dialog box. This has been fixed.
- The Finish button was not active, so could not close the final installation dialog box until clicked screen outside the dialog box. This has been fixed.
- Security rights were listed that did not apply to Easy Dental. This has been fixed.
- Maximizing the size of the Easy Dental window on a computer with two monitors always moves the window to the primary monitor. This has been fixed. The buttons at the bottom of the Activation dialog box were cut off if Easy Dental was installed on Microsoft Windows 8.1. This has been fixed.
- The Time Clock did not update immediately after a manual time punch entry was deleted. This has been fixed.
- If a patient has primary and secondary insurance and has a primary insurance claim in Accounts and the patient’s secondary insurance is cleared from Patients, the primary insurance claim could not be updated to reflect the change. This has been fixed.

Easy Dental 11.2

Overview and New Features

This Easy Dental 11 Release Guide provides information about the Easy Dental 11.2 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 11.2.

Note: For information about using the new features in Easy Dental 11.2, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Easy Dental 11.2?” in the Easy Dental Help.

New Features

Easy Dental 11.2 includes the following new features and enhancements:

- **Windows 8** – Easy Dental is now fully compatible with the Windows 8 Professional and Enterprise operating systems.
- **Redesigned toolbar buttons** – The Easy Dental toolbar buttons have been redesigned to make them more intuitive and to update the look of the user interface (UI).
- **Arch Treatment Area** – When you post procedure codes that apply to an entire arch, the **Enter Procedure(s)** and **Edit or Delete Procedure** dialog boxes now include an option for you to specify which arch (upper or lower) to apply the procedure to. From the **Procedure Code Editor** dialog box, you can now set an arch treatment area flag.
- **Area of Oral Cavity Codes** – Previous versions of Easy Dental included quadrant area codes but not arch treatment area codes. Arch treatment area codes now print on insurance claims and pre-estimates.
- **New Claim Form** – Easy Dental 11.2 now includes the ADA 2012 Claim Form. In Easy Dental, this claim format is called ED2012. The following boxes have changed: box 4 consists of two checkboxes rather than Yes/No; box 19 now reads “Reserved for Future Use;” boxes 29a and 29b have been added; box 33 no longer includes space for primary teeth, and primary teeth no longer print on the claim form; box 34 displays the diagnostic code list qualifier and prints B if the diagnostic codes are ICD-9 and AB if the diagnostic codes are ICD-10; box 34a lists diagnostic codes attached to procedures (four per claim maximum); box 38 is no longer a checkbox, but instead enters a two-digit number based on the Place of Service selected.
- **eDex** – Easy Dental now includes a contact manager called eDex that lets you manage and quickly search for Easy Dental contacts, such as patients, providers, staff, labs, insurance carriers, and contacts that are not currently stored in the Easy Dental database. You can search by first or last name, address, email address, or phone number. You can also add custom notes or append notes to a patient note.
- **Installation process** – The installation program now automatically detects Easy Dental servers on the same network. This feature simplifies the installation process. Once an Easy Dental 11.2 server is detected and selected, the workstation installation detects the server automatically and installs the workstation software automatically.
- **Easy Dental Update Manager** – If you are on an active customer service plan, you can receive updates automatically through the Easy Dental Update Manager without interrupting your workday. To facilitate the Update Manager, the EZDental folder on the Easy Dental server is now shared automatically.
- **Indiana prescription form option** – Complies with Indiana Code 16-42-19-5, which requires certain security features for prescriptions written for controlled substances.

- **Florida prescription form option** – Complies with House Bill 7095, which requires health care practitioners to use counterfeit-proof prescription pads when prescribing controlled substances.
- **Insurance claims** – Added an option to the **Dental Insurance Plan Information** dialog box to always print the provider's name in Box 53 of insurance claims for those insurance carriers that require the provider's name instead of printing "Signature on File."

Installing Easy Dental 11.2

If you have installed Easy Dental 11 and have an active Customer Service Plan, the Easy Dental 11.2 downloads automatically over the Internet through the Easy Dental Update Manager.

This update must be installed on each computer that runs Easy Dental 11. Once the update is installed on one computer on your network, you can install it easily on any other computer on your network when you launch an Easy Dental module.

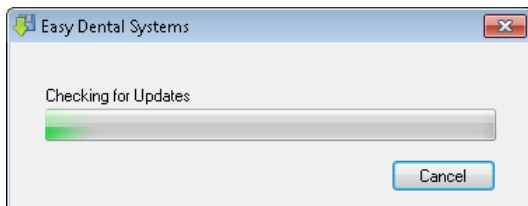
When you try to open an Easy Dental module on a computer that does not have the required updates, a window appears notifying you that the computer needs to install updates. To install the updates, from the message box, click **Install**. All open Easy Dental modules close and an install status message box appears.

Important: Easy Dental 11.2 is a critical update. Once you download a critical update, it installs immediately. We recommend that you wait to install critical updates until you are not actively using Easy Dental.

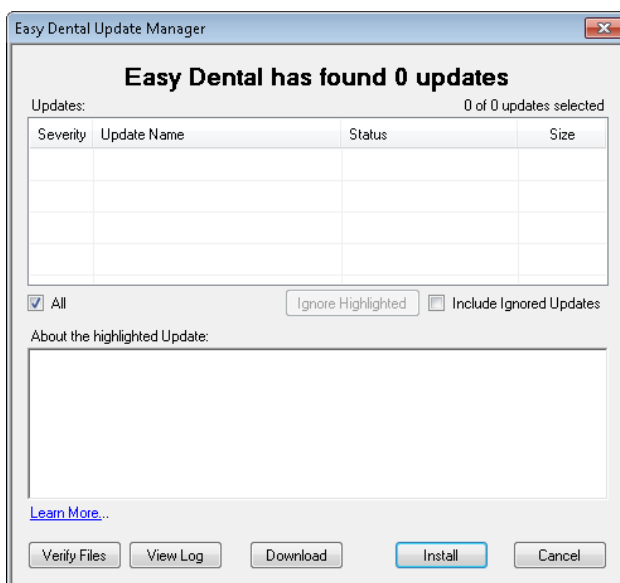
To install the Easy Dental 11.2

1. From any Easy Dental module's toolbar, click the Help button, and then from the menu, click **Check For Updates**.

The Checking for Updates progress message appears.



If updates are found the **Easy Dental Update Manager** dialog box appears.



2. Click **Install**.

Easy Dental downloads and installs the Easy Dental 11.2.

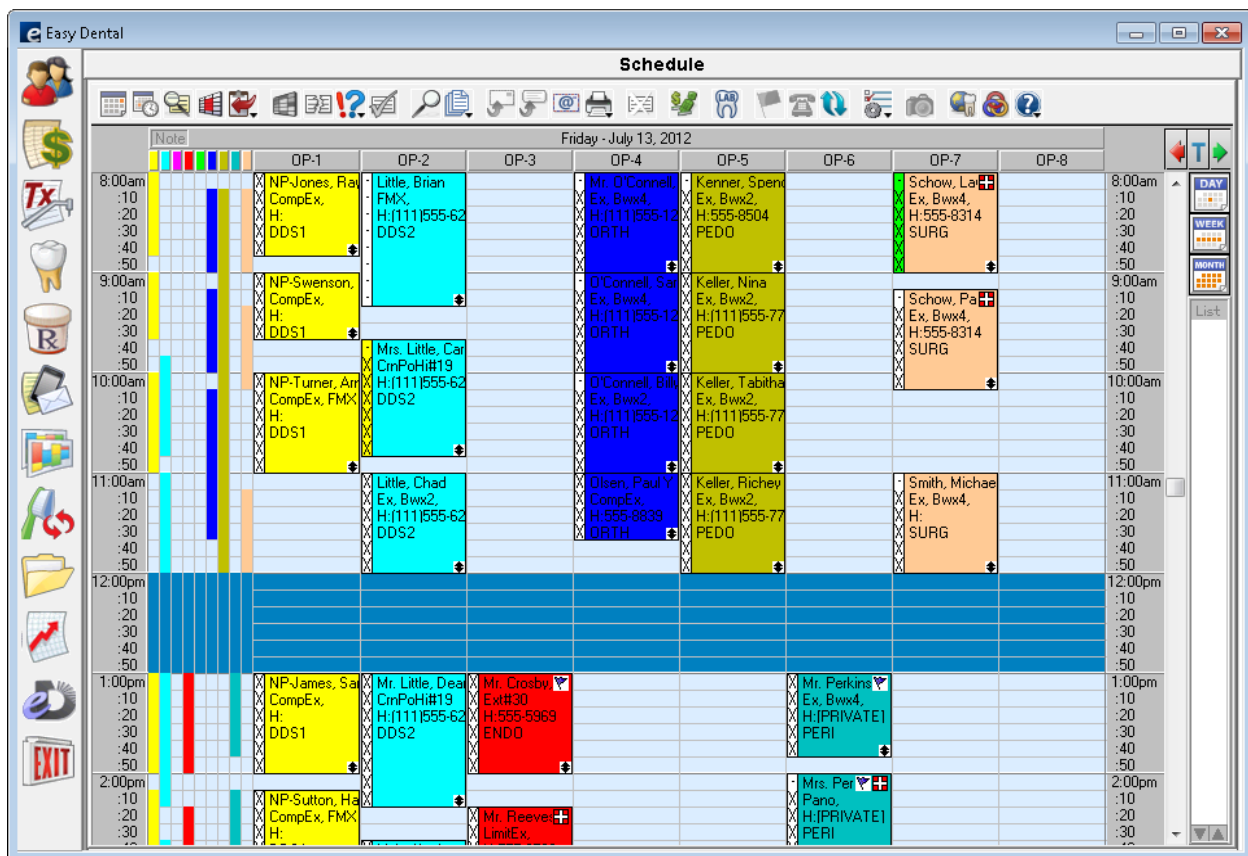
Note: The Easy Dental Update Manager checks for updates to Easy Dental and downloads them daily. The Update Manager lets you install optional and required updates automatically or manually.

Using the New Features and Enhancements

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

Toolbar

The toolbars in Easy Dental have been redesigned to make them more intuitive and to update the look of the user interface.



Reports

You can now set an arch treatment area flag. This is needed because some insurance payors require this flag, while others want the column left blank.

To set an arch treatment area flag

1. From the Reports toolbar, click the Practice Setup button, and then from the menu, click **Procedure Code Setup**.
2. From the **Procedure List** dialog box, click **New**.

The **Procedure Code Editor - New** dialog box appears.

Procedure Code Editor - New

Description:

Code Names

ADA Code

Abbrev Desc

Code 3

Code 4

Code 5

Treatment Flags

☐ Difficult Proc.

☐ Condition

☐ Remove Tooth

☐ Show in Chart

Auto Recall >>

Procedure Time Unit(s) >>

Procedure Category: [None]

Appointment Type: General

Treatment Area: Arch **Flags**

Paint Type: [None]

Fee Schedule

	Edit Fee
1. Office	0.00
2. Aetna	0.00
3. BC / BS	0.00
4. Cigna	0.00
5. Orisurg	0.00
6.	0.00
7.	0.00
8.	0.00
9.	0.00
10.	0.00
11.	0.00
12.	0.00
13.	0.00
14.	0.00
15.	0.00
16.	0.00
17.	0.00
18.	0.00
19.	0.00

☐ Do Not Bill to Insurance

☐ Require Start/Completion Dates

Edit Note New Code Save Close

3. Select **Arch** from the **Treatment Area** list, and then click **Flags**.

The **Arch Flags** dialog box appears.

Arch Flags

☒ None

☐ Procedure Codes for Alternate Arch

Maxillary: Mandibular:

OK Cancel

4. Select one of the following:
 - **None** – Flags the code to not use any procedure codes for an alternate arch.
 - **Procedure Codes for Alternate Arch** – Type the procedure codes for the maxillary and mandibular arches.
5. Click **OK**.

eDex

eDex is a contact manager that lets you manage and quickly search for Easy Dental contacts, such as patients, providers, staff, labs, insurance carriers, and contacts that are not currently stored in the Easy Dental database. You can search by first or last name, address, email address, or phone number. You can also add custom notes or append notes to a patient note.

To add a contact

1. From the eDex toolbar, click the New Contact button.

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

2. Select a category from the list, or click **Category Setup** to add a category.
3. Type the contact's information in the appropriate text boxes, and then click Save.

Easy Dental 11.2 Software Changes and Fixes

The following list contains descriptions for the fixes included in Easy Dental 11.2:

- The NPI number on the New York State Form Individual and the New York State Form Full Sheet Prescription forms was not displayed on its own line. This has been fixed.
- If the database path was a UNC path, making a snapshot copy of the database failed when Month End was run. This has been fixed.
- If the letter template path was invalid during an Easy Dental 11.1 installation, a catastrophic failure error occurred. This has been fixed.
- Selecting a printer from the **Print Preview** dialog box changed the default printer. This has been fixed.
- Easy Dental is now compliant with .Net 4.0.
- The Circle Tooth paint type would not paint a tooth when an extraction was posted to the same tooth. This has been fixed.
- Running the Provider A/R Totals Report generated an out of memory error. This has been fixed.
- Unable to add an ePrescribe user with Easy Dental. This has been fixed.
- Perio Chart was not indicating extracted teeth properly. This has been fixed.
- Posting a procedure range that included "N" generated an invalid range error when users edited or posted procedures from the Accounts module. This has been fixed.

- The Fee Schedule Report ignored the selected procedure code range. This has been fixed.
- The date of the patient's last dental visit was not printing on the Patient Survey. This has been fixed.
- Easy Dental now meets the Michigan Medicaid requirement that dental diagnostic codes appear on claims.
- The Insurance Claims to Process Report incorrectly included claims having a "Received" status. This has been fixed.
- The Hover window was not showing pictures saved with the .bmp file type. This has been fixed.
- Auto Dial did not recognize phone numbers in the **Mobile Phone** text field as valid. This has been fixed.
- The **Patient Information** dialog box would not open if Patients, Edit Insurance Information was not selected for password user rights. This has been fixed.
- If an individual ID was created for a provider, printing the Provider IDs List and the Insurance Carrier List reports caused Dxprint to stop responding. This has been fixed.
- The **Do Not Bill to Insurance** option did not remain selected when procedures were posted from the Chart. This has been fixed.
- The **Appointment Information** dialog box would not open if a patient had a combined name length of 26 or more characters. This has been fixed.
- Selecting **Insurance Payment** as the only payment type in the **Search Payments** dialog box resulted in no patients being found. This has been fixed.
- If users selected **Include Provider IDs** when generating an Insurance Carrier List, they could not clear the selection. This has been fixed.
- The Patients module incorrectly allowed users to type a secondary provider ID in the **Prov1** text box of the **Head-of-House** dialog box. Easy Dental then incorrectly recognized the secondary provider as a primary provider. This has been fixed.
- If users set auto chart numbering to "numeric" and then added patients to a family, chart numbers advanced by two instead of one number. This has been fixed.
- Insurance carriers were not updated correctly after joining employers. This has been fixed.
- The separator line between old and new appointments was missing from the **More Information** dialog box. This has been fixed.
- If users printed an Aging Report for a single billing type, the billing type name would not print at the top of the report. This has been fixed.
- Account balances in the Family Account Report did not match the running balance in the Accounts module. This has been fixed.

Easy Dental 11

Productivity Pack 1

Overview and New Features

This Easy Dental 11 Release Guide provides information about the Easy Dental 11 Productivity Pack 1 software release. This overview section includes important notes regarding the Productivity Pack 1 release, followed by a brief description of the new features and enhancements available in Productivity Pack 1.

Note: For information about using the new features in Productivity Pack 1, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Easy Dental 11 Productivity Pack 1?” in the Easy Dental Help.

New Features

Easy Dental 11 Productivity Pack 1 includes the following new features and enhancements:

- **ePrescribe** – You can now use the ePrescribe web service to create electronic prescriptions and send them to a patient’s pharmacy.
- **ADA–CDT Dental Codes** – This list was updated throughout Easy Dental to use the new codes for 2011/2012 and 2013.
- **Deposit Slips** – You can now customize your deposit slips to exclude \$0 payments.

Installing Easy Dental 11 Productivity Pack 1

If you have installed Easy Dental 11 and have an active Customer Service Plan, the Easy Dental 11 Productivity Pack 1 downloads automatically over the Internet.

Using the New Features and Enhancements

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

Reports

Electronic Prescriptions

With Easy Dental 11 Productivity Pack 1, you can now subscribe to the ePrescribe web service and create and send prescriptions electronically to a patient's pharmacy. Prescribing online is not only more convenient than script pads, but you receive notification of drug interactions, dosage levels, and patient-specific factors, such as prior adverse reactions, instantaneously.

Note: You must enable secure passwords in Easy Dental before you can use the electronic prescriptions feature. To learn more about enabling secure passwords, please refer to "Setting up passwords" in the Help.

To subscribe to the ePrescribe web service

1. From the Reports toolbar, click Practice Setup, and then from the menu, click **Practice Resource Setup**.
The **Practice Resources** dialog box appears.

Practice Resources

Practice Information

Easy Dental Practice - Tutor Database
727 E Utah Valley Drive, #500

American Fork, UT 84003
(801)763-9300 ext:

Administrative Contact: DDS1
HIPAA Officer:
Fiscal Year: January
Bank #:

Edit

Operatories

1	OP-1
2	OP-2
3	OP-3
4	OP-4
5	OP-5
6	OP-6
7	OP-7
8	OP-8

New
Edit
Delete

Provider(s)

ID	Name	Status
DDS1	Smith, Dennis	Primary
DDS2	Smith Junior, Dennis	Primary
DDS3	Cook, Maria	Primary
ENDO	Evans, Erica	Primary
HYG1	Hayes, Sally	Secondary
ORTH	Oliverson, Oscar	Primary
PEDO	Childs, Brenda	Primary
PERI	Pearson, Paula	Primary
SURG	Sorensen, Steve	Primary

New
Edit
Inactivate

☐ List Inactive

Staff

ID	Name	Status
MGR1	Taylor, Judy	Staff
OFC1	Jones, Susan	Staff

New
Edit
Inactivate

☐ List Inactive

Close

- Under **Provider(s)**, select the provider who will subscribe to and administer ePrescribe, and then click **Edit**.

The **Provider Information** dialog box appears.

Provider Information

Name: Last: First: MI: Suffix:

ID: Title: ☐ Non-Person Fee Schedule: >>

Specialty: SS#:

Address: Street: State ID#: State:

Suite #500 State License Expiration:

City: ST: Zip: TIN#:

Phone: Ext: Medicaid#:

E-Mail: DEA#:

DEA License Expiration:

DEA Schedule: ☐ I ☐ II ☐ III ☐ IV ☐ V

Assigned Operators:

Class: ☒ Primary ☐ Secondary

NPI:

☒ Blue Cross ID#: ☐ Blue Shield ID#:

Provider#:

Office#:

Other ID#:

UPIN#:

Controlled Substance#:

Insurance Claim Options:

☐ Print Provider's Signature Using:

☐ "Signature On File" ☒ Provider's Name

3. If you haven't done so already, type your practice information in the fields provided, and then click **OK**.

- **E-mail** – Type the provider's e-mail address.
- **State ID #** – Type the provider's state ID number.
- **State** – Type the two-digit postal code for the state the provider is licensed in.
- **State License Expiration** – Type the expiration date of the provider's state license.
- **DEA #** – Type the provider's DEA ID number.
- **DEA License Expiration** – Type the expiration date of the provider's DEA license.
- **DEA Schedule** – Select the appropriate schedules.
- **NPI** – Type the provider's National Provider Identifier number issued by the Centers for Medicare and Medicaid Services (CMS).

- From the **Practice Resources** dialog box under **Practice Information**, click **Edit**.

The **Practice Information** dialog box appears.

Practice Information

Title:
Easy Dental Practice - Tutor Database

Address:

Street
727 E Utah Valley Drive, #500

City ST Zip
American Fork UT 84003

Phone Ext Fax
(801)763-9300

Settings:

Administrative Contact: DDS1 >>

HIPAA Officer: >>

Bank Deposit Number

Fiscal year's beginning month (1-12): 1

☒ Use Practice Info on Statements.
☐ Use Provider Info on Statements.

ePrescribe

Expiration Date: Setup

Num. of Licenses: Administer

Not Active

OK Cancel

- If you haven't done so already, type your practice's Fax number in the **Fax** text box.
- Under **ePrescribe**, click **Administer**.
The **ePrescribe Connection** dialog box appears.
- Call the toll free number to subscribe and receive your license key.
- Click **OK**.

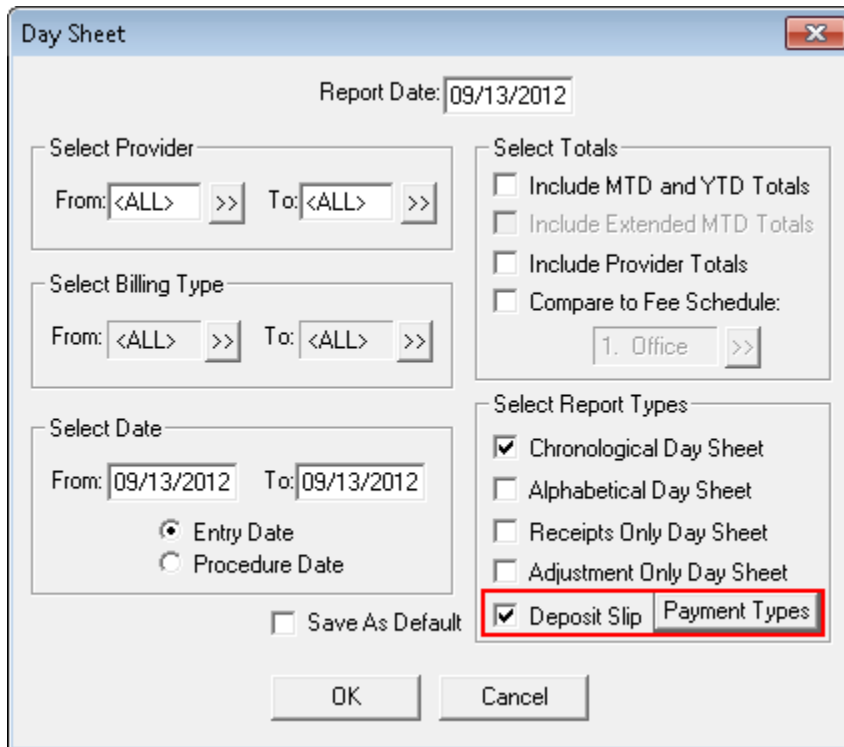
Deposit Slips

With Easy Dental Productivity Pack 1, you can customize the format of your deposit slips to exclude \$0 amounts.

To format a deposit slip to exclude \$0 amounts

1. From the Reports toolbar, click Management Reports, and then from the menu, click **Day Sheet (Charges and Receipts)**.

The **Day Sheet** dialog box appears.



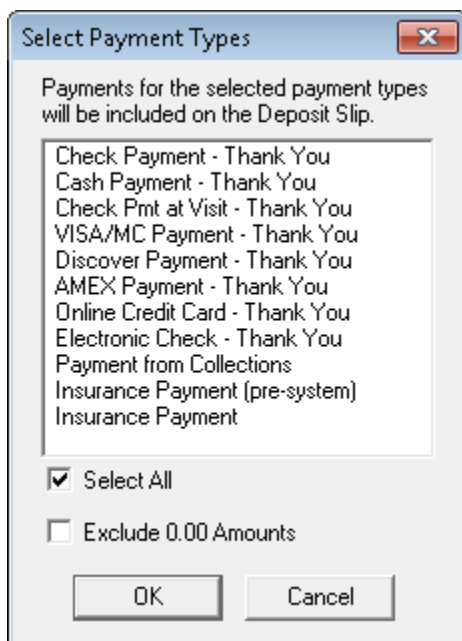
The **Day Sheet** dialog box is shown with the following settings:

- Report Date:** 09/13/2012
- Select Provider:** From: <ALL> To: <ALL>
- Select Billing Type:** From: <ALL> To: <ALL>
- Select Date:** From: 09/13/2012 To: 09/13/2012
 - ☒ Entry Date
 - ☐ Procedure Date
- ☐ Save As Default
- Select Totals:**
 - ☐ Include MTD and YTD Totals
 - ☐ Include Extended MTD Totals
 - ☐ Include Provider Totals
 - ☐ Compare to Fee Schedule: 1. Office
- Select Report Types:**
 - ☒ Chronological Day Sheet
 - ☐ Alphabetical Day Sheet
 - ☐ Receipts Only Day Sheet
 - ☐ Adjustment Only Day Sheet
 - ☒ **Deposit Slip** **Payment Types**

Buttons: OK, Cancel

2. Under **Select Report Types**, select **Deposit Slip**, and then click **Payment Types**.

The **Select Payment Types** dialog box appears.



The **Select Payment Types** dialog box is shown with the following settings:

- Payments for the selected payment types will be included on the Deposit Slip.**
- List of payment types:
 - Check Payment - Thank You
 - Cash Payment - Thank You
 - Check Pmt at Visit - Thank You
 - VISA/MC Payment - Thank You
 - Discover Payment - Thank You
 - AMEX Payment - Thank You
 - Online Credit Card - Thank You
 - Electronic Check - Thank You
 - Payment from Collections
 - Insurance Payment (pre-system)
 - Insurance Payment
- ☒ Select All
- ☐ Exclude 0.00 Amounts

Buttons: OK, Cancel

3. Select **Exclude 0.00 Amounts** and click **OK**.

Easy Dental 11 Productivity Pack 1

Software Changes and Fixes

While you are learning to use Easy Dental, you may want to gain hands-on experience by adding and editing sample information in Easy Dental. Easy Dental provides a sample tutor database you can use for this purpose.

The following list contains descriptions for the fixes included in Easy Dental Productivity Pack 1:

- The **Post/Set Complete** dialog box no longer freezes when someone clicks the **Next** button in the Schedule on another computer.
- Recall labels no longer print too far to the left.
- Send Message now sends a message to the selected patient rather than the guarantor of the account.
- Prescription Setup now includes the CA (California) Standard prescription form.
- Selecting **ECF** or **Other** as the **Place of Treatment** in the **Insurance Claim Information** dialog box no longer improperly returns the Office (11) code.
- The Avery 5160 mailing label option in the Reports module now prints 10 rows of labels instead of 11.
- Using the short date format in Regional Settings no longer gives an error or prevents Easy Dental from opening.
- You can now print the Patient Notes Report for patients who have multiple patient alerts.
- Print jobs from the Perio Chart now print to the printer set up in the Chart rather than the Microsoft Windows default printer.
- Moving an appointment from the Pinboard or the Appointments List to the Schedule no longer shows the wrong size if the default interval is set to other than 10 minutes.

Easy Dental 11

Overview and New Features

This Easy Dental 11 Release Guide provides information about the Easy Dental 11 software release. This overview section includes important notes regarding the Easy Dental 11 release, followed by a brief description of the new features and enhancements.

Note: For information about using the new features in Easy Dental 11, refer to “Using the New Features and Enhancements” in this document or “What’s New in Easy Dental 11?” in the Easy Dental Help.

New Features

Easy Dental 11 includes the following new features and enhancements:

- **Letter Merge** – The Easy Dental Letter Merge feature now includes an option that allows you to open a data file automatically in Microsoft Excel. If Easy Dental does not detect Microsoft Excel, Easy Dental gives you the option of opening the data file in Notepad.
- **Provider A/R Totals Report** – View a report of accounts receivables totals by provider for a specified provider range. You can also view adjustment types by production or collections category.
- **Practice Analysis** – The Reports module toolbar now includes a Practice Analysis button, so you can open the Practice Analysis module.
- **Chat with Support** – Have a question for an Easy Dental support technician? Use the new Chat with Support option to start an online chat session with a member of our Easy Dental Support team.
- **Enhancement Request** – Have a suggestion to improve Easy Dental? The Easy Dental Help system now includes an “Enhancement Request” link so you can more easily request enhancements.
- **Batch Primary Insurance Claims** – You can now include or exclude procedures with a \$0 amount.
- **HIPAA 5010** – Easy Dental 11 complies with the new HIPAA 5010 requirements. In part, this means that whenever you post or set a procedure complete from Chart, Treatment Plans, or Schedule, Easy Dental will automatically add start and completion dates for procedures requiring these dates.

Using the New Features and Enhancements

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

Reports

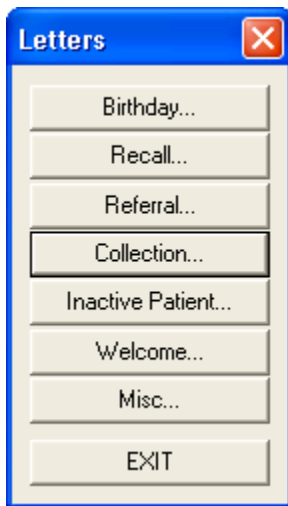
Letter Merge

Easy Dental 11 lets you merge a data file directly in Microsoft Excel.

To merge a data file in Microsoft Excel

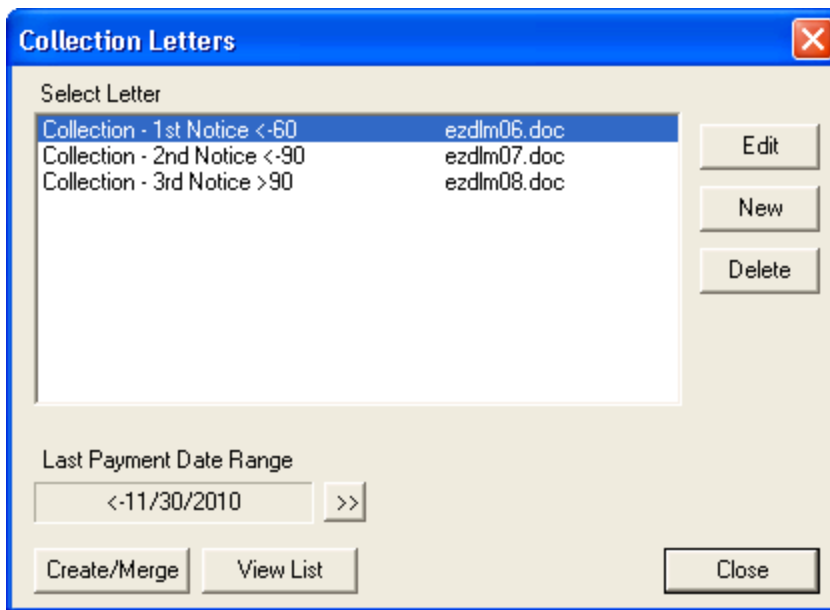
1. From the Reports toolbar, click Letters.

The **Letters** dialog box appears.



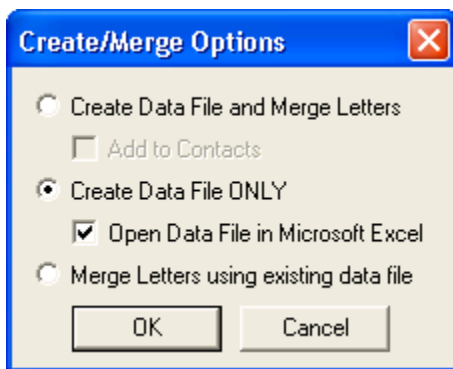
2. Click the type of letter that you want.

A dialog box corresponding to the letter type you selected appears.



3. Select a letter from the **Select Letter** list, and then click **OK**.

The **Create/Merge Options** dialog box appears.



4. Select **Create Data File ONLY**, select **Open Data File in Microsoft Excel**, and click **OK**.

Easy Dental opens the data file and inserts it into Microsoft Excel.

Provider A/R Totals Report

The Provider A/R Totals Report includes the transaction totals that normally print at the bottom of a day sheet by provider for a specified provider range. This report also allows you to view adjustment types by either a production or a collections category.

To generate the report

1. From the Reports toolbar, click Management Reports, and then click **Provider A/R Totals**.

The **Provider A/R Totals** dialog box appears.

Provider A/R Totals

Report Date: 11/11/2011

Select Provider

From: <ALL> >> To: <ALL> >>

Select Billing Type

From: <ALL> >> To: <ALL> >>

Select Date

From: 11/11/2011 To: 11/11/2011

☒ Entry Date
☐ Procedure Date

Select Report Options

☒ Include MTD, YTD & Prev. Month Totals
☐ Include Daily Summary
☐ Include Daily Summary by Provider
☐ New Page for Each Provider
☐ Exclude Days with No Transactions
☒ Include Adjustment Types List

Adjustment Types

☐ Save As Default

OK Cancel

2. If necessary, change the **Report Date** from the default.
3. Select a provider, billing type, and date range.
4. Select **Entry Date** (system date when you posted the procedure) or **Procedure Date** (differs from the entry date if you changed the procedure date).
5. Select one or more report options.
6. Click **OK** to send the report to the Batch Processor.

Miscellaneous Features

HIPAA 5010

Easy Dental 11 complies with the new HIPAA 5010 requirements. Meeting these requirements necessitated adding a “Require Start/Completion Dates” option to the **Procedure Code Editor**, **Enter Procedure(s)**, and **Edit or Delete Procedure** dialog boxes.

Procedure Code Editor - New

Description:

Code Names

ADA Code

Abbrev Desc

Code 3

Code 4

Code 5

Treatment Flags

☐ Difficult Proc.

☐ Condition

☐ Remove Tooth

☐ Show in Chart

Auto Recall

Procedure Time Unit(s)

Procedure Category:

Appointment Type:

Treatment Area:

Paint Type:

Fee Schedule

1. Office	0.00
2. Aetna	0.00
3. BC / BS	0.00
4. Cigna	0.00
5. OrISurg	0.00
6.	0.00
7.	0.00
8.	0.00
9.	0.00
10.	0.00
11.	0.00
12.	0.00
13.	0.00
14.	0.00
15.	0.00
16.	0.00
17.	0.00
18.	0.00
19.	0.00

☐ Do Not Bill to Insurance

☐ Require Start/Completion Dates

Enter Procedure(s)

Date: Start Date: Completion Date:

Procedure:

Procedure Description

Status

☐ Treatment Plan

☒ Completed

Amount:

Provider:

☐ Do Not Bill to Insurance

☒ Require Start/Completion Date

Explosion Codes:

Bridge

DO Amalg.

DO Comp.

MOD Amalg

MOD Comp.

PerioExam

Perio-Low

Perio-Up

REAdult

REChild

REComp

TxRC/Crwn

Procedure List

*Procedure requires additional treatment information.

With Easy Dental 11, you can also view, add, change, or delete the “reasons” (according to information received on a paper EOB) for claim level adjustments made to primary insurance claims.

Chat with Support

You can use the Chat with Support option to start an online chat session with a member of our Easy Dental Customer Support Team.

To initiate a chat session

1. From the toolbar of any Easy Dental module, click Help and then click **Chat with Support**.
Easy Dental connects you through your default browser to the Easy Dental Support site, and the **Required Information** dialog box appears.

Required information

Your Name:

Customer ID:

Practice Zip Code:

Product: ▼

Version:

Description of Problem:

2. Type your information, and then click **Submit**.

Enhancement Requests

Submitting suggestions to improve Easy Dental has never been easier now that the Help system includes an “Enhancement Request” link.

To make an enhancement request

1. From the toolbar of any Easy Dental module, click Help, and then click **Enhancement Request**.
Easy Dental connects you through your default browser to the Easy Dental Suggestion Box.
2. Select the category that your suggestion applies to from the list.
3. Type your comments, name, customer ID, and e-mail address in the appropriate fields, and then click **Submit**.

Easy Dental 11 Software Changes and Fixes

The following list contains descriptions for the fixes included in Easy Dental 11:

- The message that appears before you start Month End has been rewritten to provide a clearer warning.
- An Ezdshell MFC application error that appeared when you enabled tablet functionality no longer appears.
- Not all ADA codes printed on the managed care fee schedule. This has been fixed.
- When you used the Schedule on multiple computers simultaneously, there was a brief delay when you changed days. This has been fixed.

- A problem with incorrect information printing on the Insurance Carrier list report that includes subscribers has been fixed.
- When you selected the clock in/out password right, Easy Dental selected other password rights too. This has been fixed.
- An error occurred when you tried to set the practice defaults billing provider to use a specific name before selecting the provider who performed the procedure. This has been fixed.
- When you double-clicked an available time in the Schedule to set a new appointment, selected an existing patient from the **Select Patient** dialog box, and clicked **OK**, the **Enter New Patient Information** dialog box appeared. This has been fixed.
- Bridges posted in the Chart were not painted correctly. This has been fixed.
- Entering appointment descriptions of 14 or more characters hid the last numeral of phone numbers. This has been fixed.
- Posting a \$0 secondary insurance payment for the same day a primary claim was settled caused the deposit slip to display the subscriber name rather than the insurance name for the payment. This has been fixed.