## easydental<sup>®</sup>

## **Easy Dental 11**

Release Guide

(For Easy Dental 11.2, Easy Dental 11 Productivity Pack 1, and 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.

## **Table of Contents**

Easy Dental 11.2	1
Overview and New Features	2
New Features	2
Installing Easy Dental 11.2	3
Using the New Features and Enhancements	4
Toolbar	4
Reports	5
eDex	6
Easy Dental 11.2 Software Changes and Fixes	6
Easy Dental 11 Productivity Pack 1	
Overview and New Features	2
New Features	2
Installing Easy Dental 11 Productivity Pack 1	2
Using the New Features and Enhancements	
Reports	
Easy Dental 11 Productivity Pack 1 Software Changes and Fixes	
Easy Dental 11	
Overview and New Features	2
New Features	2
Using the New Features and Enhancements	3
Reports	
Miscellaneous Features	
Fasy Dental 11 Software Changes and Fixes	8

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 ot 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 chaged: 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 mange 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 interupting 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 prescriptins written for controlled substances.

- **Florida prescription form option** Complies with House Bill 7095, which requires health care practioners 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.

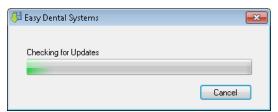
When you try to open an Easy Dental module on a computer that does not have the required updates, a window appears notifying you that the computer needs to install updates. To install the updates, from the message box, click **Install**. All open Easy Dental modules close and an install status message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

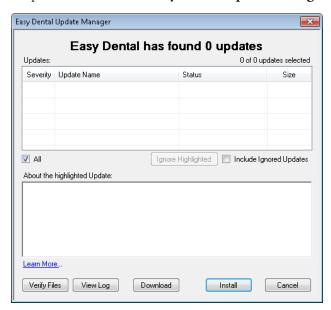
#### To install the Easy Dental 11.2

 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.

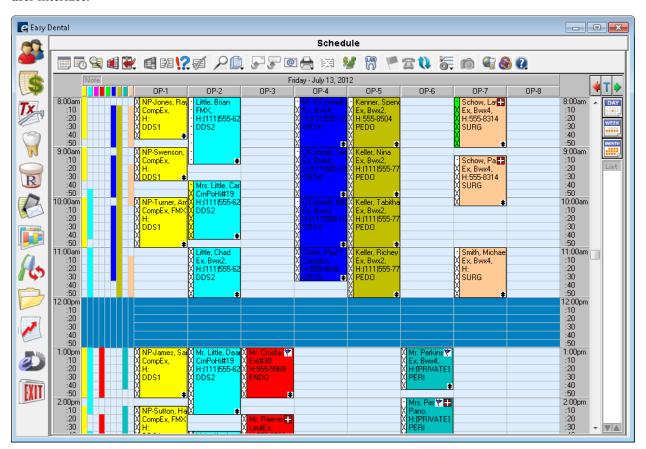
**Note**: The Easy Dental Update Manager checks for updates to Easy Dental and downloads them daily. The Update Manager lets you install optional and required updates automatically or manually.

## 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.



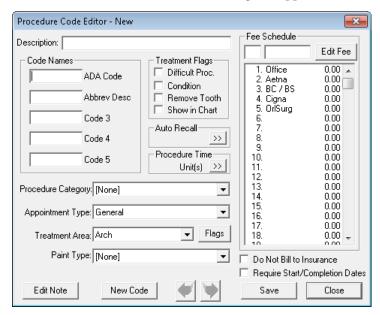
## Reports

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

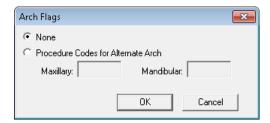
- 1. From the Reports toolbar, click the Practice Setup button, and then from the menu, click **Procedure Code Setup**.
- 2. From the **Procedure List** dialog box, click **New**.

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



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

The **Arch Flags** dialog box appears.



- **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.

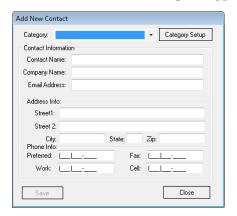
#### **eDex**

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

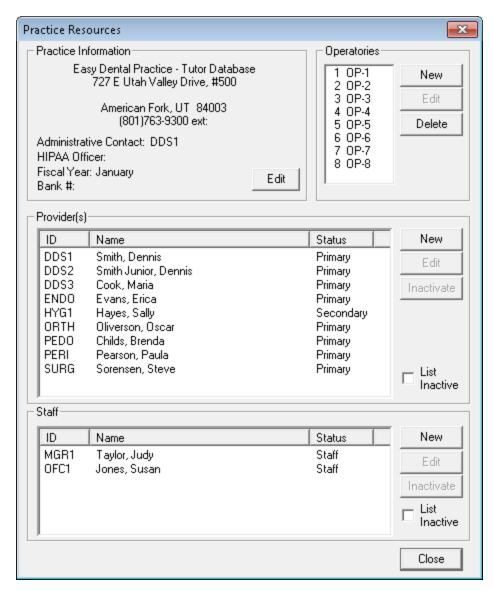
### **Electronic Prescriptions**

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.

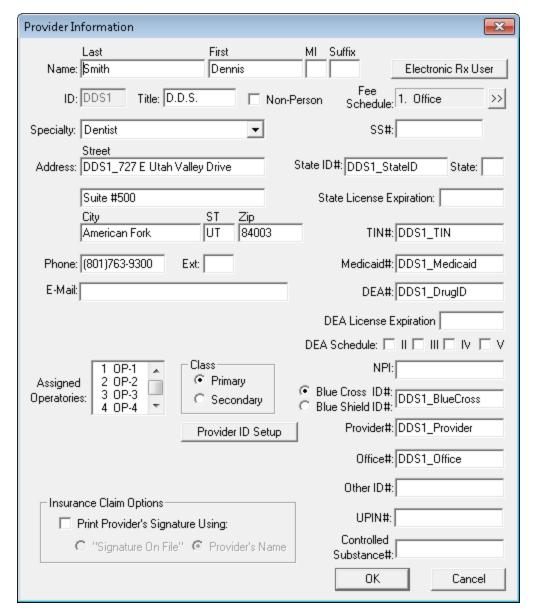
#### To subscribe to the ePrescribe web service

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



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

The **Provider Information** dialog box appears.



- 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).

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

The **Practice Information** dialog box appears.



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

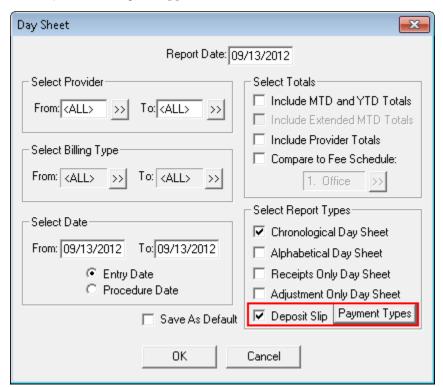
### **Deposit Slips**

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

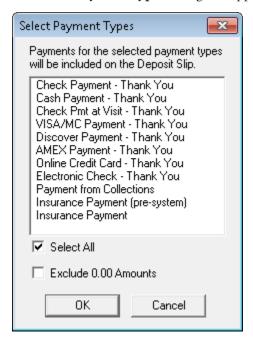
1. From the Reports toolbar, click Management Reports, and then from the menu, click **Day Sheet** (Charges and Receipts).

The **Day Sheet** dialog box appears.



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

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



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.



## **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 fro 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

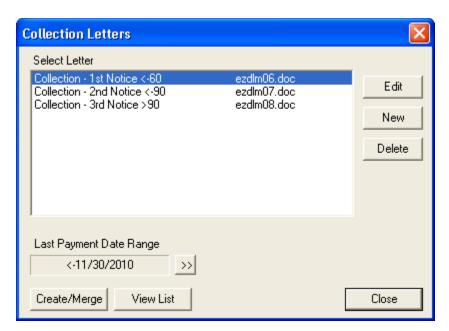
1. From the Reports toolbar, click Letters.

The **Letters** dialog box appears.



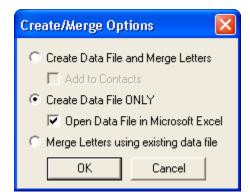
2. Click the type of letter that you want.

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.

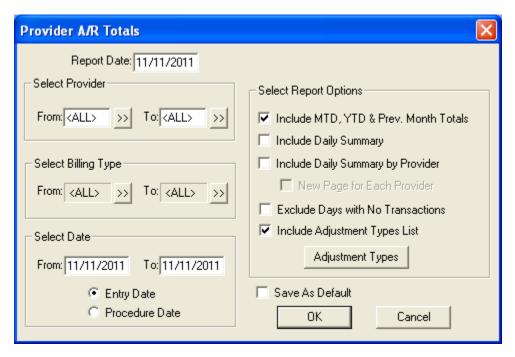
### **Provider A/R Totals Report**

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.

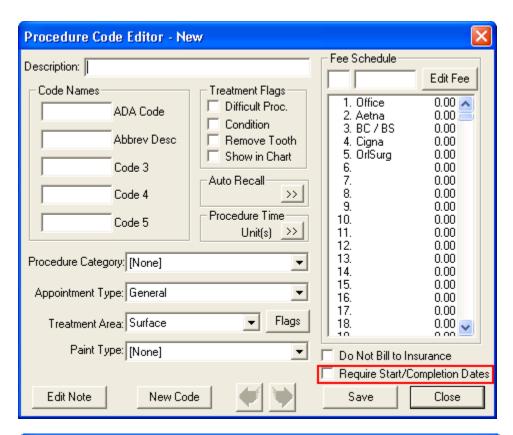


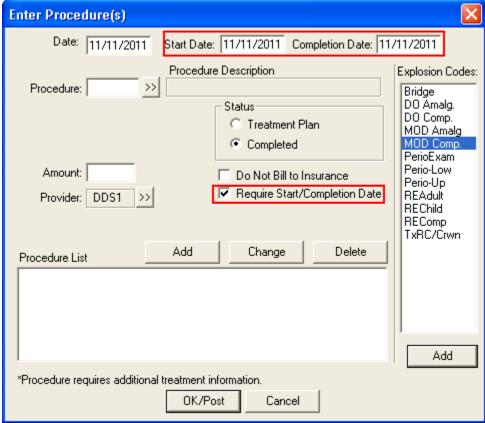
- 2. If necessary, change the **Report Date** from the default.
- 3. Select a provider, billing type, and date range.
- **4.** Select **Entry Date** (system date when you posted the procedure) or **Procedure Date** (differs from the entry date if you changed the procedure date).
- **5.** Select one or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

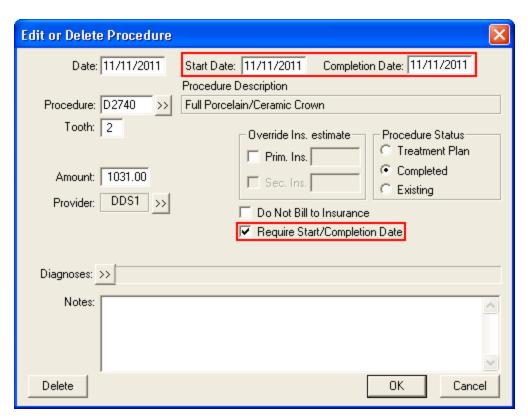
### **Miscellaneous Features**

#### **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.







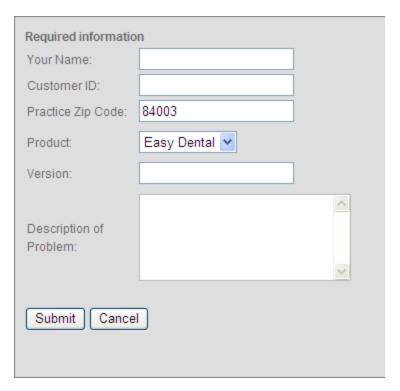
With Easy Dental 11, you can also view, add, change, or delete the "reasons" (according to information received on a paper EOB) for claim level adjustments made to primary insurance claims.

### **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

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.



**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.