

# Spring 2010 Easy Dental Seminar Course Outlines

## Fundamentals Seminar

### Patients Module

- Selecting/Searching for a Patient
- Creating a New Family
- Creating Medical Alerts
- Attaching Insurance to Patients
- Attaching Referrals to Patients
- Entering Patient Notes

### Schedule Module

- Scheduling an Appointment for New and Existing Patients
- Finding Available Appointment Times
- Locating an Existing Appointment
- Rescheduling, Deleting, or Breaking an Appointment
- Purging Unscheduled List
- Setting an Appointment Complete
- Generating Route Slips
- Setting up the Schedule Module

### Lab Case Manager

- Setting up the Lab Case Manager
- Creating New Lab Cases
- Customizing Views
- Attached Lab Cases to Appointments

### Accounts Module

- Posting & Editing Procedures
- Creating Insurance Claims
- Entering Insurance Payments
- Entering Guarantor Payments & Adjustments
- Searching Payments
- Printing Walkout Statement
- Using the Easy Checkout Button
- Running Month End

### Treatment Plans Module

- Creating Pre-treatment Estimates
- Customizing the Estimator View
- Updating Treatment Plan Fees
- Setting an Order for Treatment-planned Procedures
- Displaying & Hiding Treatment Plan Orders
- Printing the Estimator and Default Note
- Generating the Unscheduled Treatment Plans Report
- Creating Treatment Plan Letters

### Chart Module

- Chart Overview
- Setting up the Chart
- Posting Existing, Completed, or Treatment-planned Procedures
- Editing/Deleting Procedures
- Printing Progress Notes

## In-Depth Seminar

### New Features in Easy Dental 2009

- Install-related Updates
- Accounts Module Enhancements
- Reports Module Enhancements
- Schedule Module Enhancements
- Perio Module Enhancements
- eServices Enhancements

### Advanced Charting and Perio Management

- Posting Procedures Using the Auto-state Button
- Creating Explosion Codes
- Changing Dentition
- Entering Default Procedure Code Notes
- Using Clinical Notes
- Using Guru LE for Patient Education
- Perio Chart Overview
- Setting up the Perio Chart
- Creating Perio Exams
- Comparing Exams
- Printing Perio Charts and Letters

### Insurance Management

- Using Coverage Tables, Payment Tables, Fee Schedules, and Billing Types
- Assigning Insurance Provider IDs
- Editing Deductibles
- Maintaining Insurance Plans
- eClaims

### Recall Management

- Editing Recall Defaults
- Attaching Recall to Patients and Appointments
- Viewing the Recall Display List
- Printing Recall Cards
- Using eCentral to Automate your Recall

### Effective Practice Management Routines

- Daily
- Weekly
- Monthly

### Learning Resources

- Accessing On-demand Training
- Searching the Support Knowledgebase
- Searching the User's Guide PDF