

Overview

Volume XII

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Overview

New Icon

The first thing you may notice is that the **EagleSoft** icon has changed. Patterson has introduced a new logo for its vast line of products and services and this is reflected in the Patterson **EagleSoft** icon.



EagleSoft Today

EagleSoft Tip

EagleSoft Today can be used as an interactive route sheet.

EagleSoft Tip

EagleSoft Today uses all the same icons and indicators as OnSchedule. The color blocks on the right indicate the Appointment Type color. Double and Triple book colors appear as arrows next to the appointment time. Overdue Tasks appear in red.

Time	Appointment	Status	Appointment Type Color
8:00 am - 9:10 am	Appt - Jack Abbott (3) -	Confirmed - 4/01/2005	Green
9:30 am - 11:00 am	Appt - Virginia Adams (54) - Crown prep #4	Phone Busy	Yellow
11:00 am - 12:00 pm	Appt - Jesse Adani (45) - #2-0-Amal, #3-MO-Amal	Unconfirmed	Blue
1:00 pm - 1:30 pm	Appt - Keith Davies (62) - Insole tooth upper left	Unconfirmed	Green
1:30 pm - 2:30 pm	Appt - Alice Adams (55) - #30 RCT	Waiting/Callback	Red
2:30 pm - 3:10 pm	Appt - Denise Schultz (28) - Bridge del	Unconfirmed	Green
3:10 pm - 4:10 pm	Appt - Holly Adkins (48) - sealants #2,15,18,31	Unconfirmed	Blue
7:00 am - 7:30 am	Appt - Bryan A. Abernathy (Junior) (72) - child prophyl	Confirmed - 4/01/2005	Green
8:00 am - 9:30 am	Appt - Cosmetic Smiles Library AAA (73) -	Unconfirmed	Blue
10:40 am - 11:10 am	Appt - Billy Babbs (9) - recall	No Answer	Yellow
11:10 am - 12:00 pm	Appt - Kelly Davies (61) - recall	Unconfirmed	Green
1:00 pm - 2:00 pm	Appt - Richard Ballard (32) - recall needs FMX	Unconfirmed	Blue
2:00 pm - 3:00 pm	Appt - Jim Carson (68) - recall	Sent Email	Green
3:00 pm - 4:00 pm	Appt - Joy Dickson (59) - recall, BWX	Unconfirmed	Blue
8:00 am - 9:00 am	Appt - Bryan Abernathy (Senior) (25) - recall	Sent Email	Green
10:00 am - 11:00 am	Appt - Corey Adkins (47) - recall	Waiting/Callback	Yellow
11:00 am - 12:00 pm	Appt - Doanna White (40) - recall	Unconfirmed	Blue
1:00 pm - 1:40 pm	Appt - Andrew Dickson (58) - recall	Unconfirmed	Green
1:40 pm - 2:30 pm	Appt - Mindy Eaton (70) - recall	Phone Busy	Yellow
2:30 pm - 3:20 pm	Appt - Patty Jennings (22) - recall, BWX	Left Message	Green
3:20 pm - 4:10 pm	Appt - Jake Allen (44) - recall	Unconfirmed	Blue
8:00 am - 9:30 am	Appt - Angela Abbott (63) -	Unconfirmed	Blue
11:00 am - 11:40 am	Appt - Terry Walden (65) - #1 ext	No Answer	Yellow
12:00 pm - 1:00 pm	Appt - Harrison R. Goldenblatt (Harry) (82) -	Other	Green

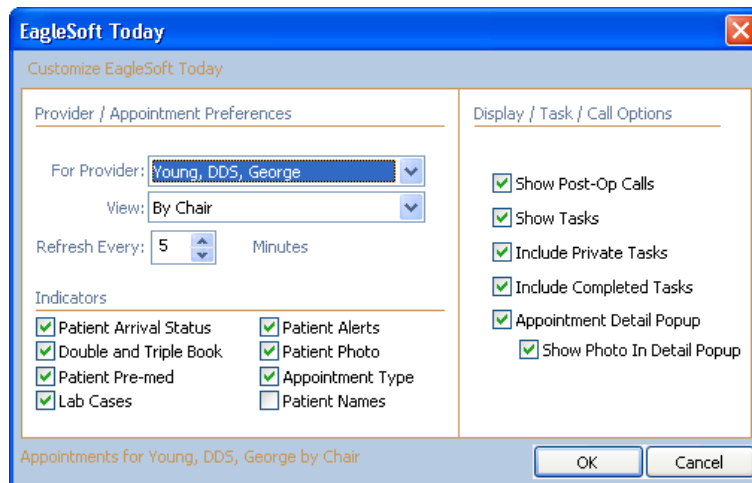
EagleSoft Today is like a digital day planner for your desktop. This module will allow you to view daily **Appointments**, **Tasks** and **Post-Op** calls from a centralized

location. Access detailed information associated with these areas of the software. View items by **Chair** or **Provider**.

To access this new virtual screen, select **Window | ESToday**. In the Appointment bar, use the drop-down arrow to select the desired date.

Double-click appointments, tasks and post-op calls to open the live information for editing.

Customizing EagleSoft Today



To customize your *EagleSoft Today*, select the hyperlink at the bottom **View: All Appointments by <<selected setting>>**. In the **Customize EagleSoft Today** window, use the drop down arrows to select **Provider**, **View** and **Refresh** settings. In the **Indicators** area, select from the following checkbox options: **Patient Arrival Status**, **Double and Triple Book**, **Patient Pre-med**, **Lab Cases**, **Patient Alerts**, **Patient Photo**, **Appointment Type** and **Patient Names**.

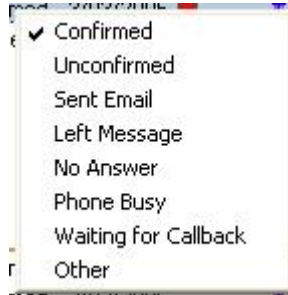
In the **Display/Task/Call Options** area, select from the following checkbox options: **Show Post-Op Calls**, **Show Tasks**, **Include Private Tasks**, **Include Completed Tasks**, **Appointment Detail Popup** and **Show Photo in Detail Popup**.

Select **OK** to save and apply your options. Select **Cancel** to close the window without saving.

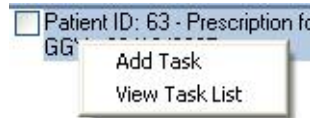
Right-Click Menus



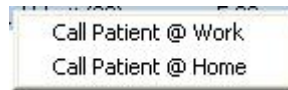
Use the right-click menu on a selected Appointment to **Edit, Delete, Find Appointments, Locate Appointments, Call Patient @ Work, Call Patient @ Home, Email Patient, Set Next Arrival Indicator, Mark As Walked Out, Refresh** and **Print Today's Appointments**.



Use the left-click menu on the confirmation status to toggle between **Confirmed, Unconfirmed, Sent Email, Left Message, No Answer, Phone Busy, Waiting for Callback** and **Other**.



Use the right-click menu on a selected **Task** to **Add Task** or **View Task List**.

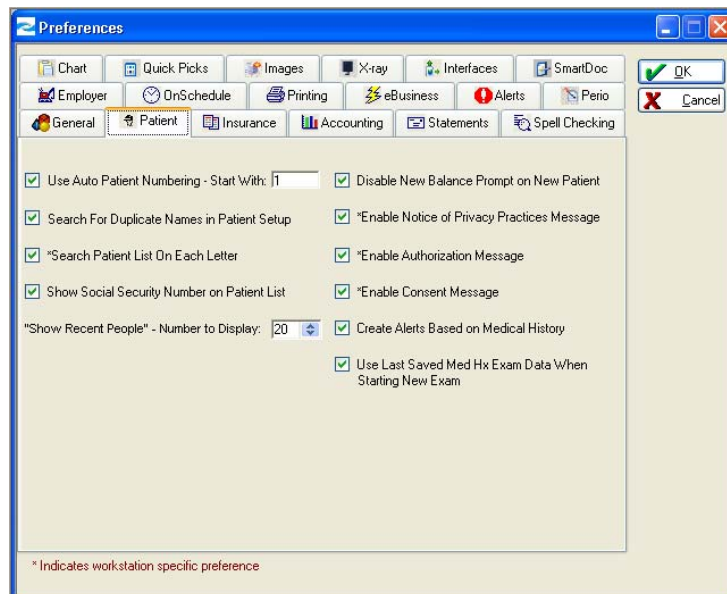


Use the right-click menu on a selected **Post-Op** call to **Call Patient @ Work, Call Patient @ Home**.

Preferences

When viewing the **Preferences**, you will notice that the **Patient Preferences** have been moved from the **General** tab to the new **Patient** tab.

EagleSoft Tip
Show Recent People
 does not affect the
 toolbar Patient list.



“Show Recent People” – Number to Display – Use this option to determine the number of previously accessed persons to be displayed on the Person List. This will allow you to select the **Show Recent People** checkbox on the **Person List** and display only the most recently used persons in your database up to the number you have selected. Your **Recent People** list will also include any patients who have scheduled appointments for that day.

Referral

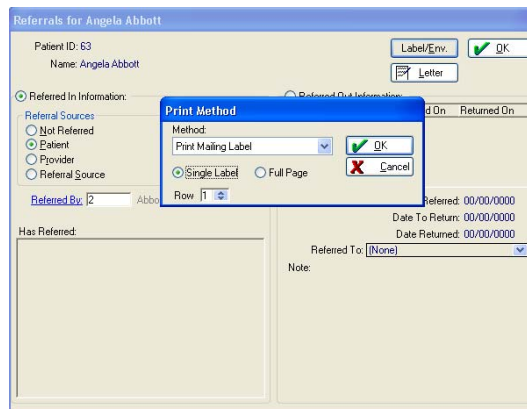
Referral Reporting

Manage your Referral and Recipient Sources with several new reports.

Patients by Other Referral Source	A listing of all patients with other referral sources.
Patient Notes by Other Referral Source	All notes during the selected date range with the filter ability by patient or service code or referral source.
Service History by Other Referral Source	This report shows patient recall dates during the selected range of dates based on service activity.
Referral Sources Master	This report shows a general listing of all referral sources including patients, providers and other referral sources.
Referral Recipient And Source Master	Shows a master list of referral recipients and sources
Referral Recipient And Source Labels	Mailing labels for all sources and recipients
Referral Recipient And Source Laser Labels	Laser mailing labels for all sources and recipients

Referral Printing

Print Referral labels from the **Edit Patient | Referrals** screen, the **Referral Recipient** screen and the Referral Source screen.



In **Edit Person | Referral**, select the **Label/Env.** button to print labels, laser labels and envelopes.

In the **List** menu, select **Referrals | Recipients** or **Sources**. Highlight the desired **Recipient** or Source from the list and select **Edit**. Select the **Label/Env.** button to print labels, laser labels or envelopes.

Chart

Chart Preferences

In the new section **When Charting Surface Codes on Multiple Teeth**, the following options have been made available for charting.

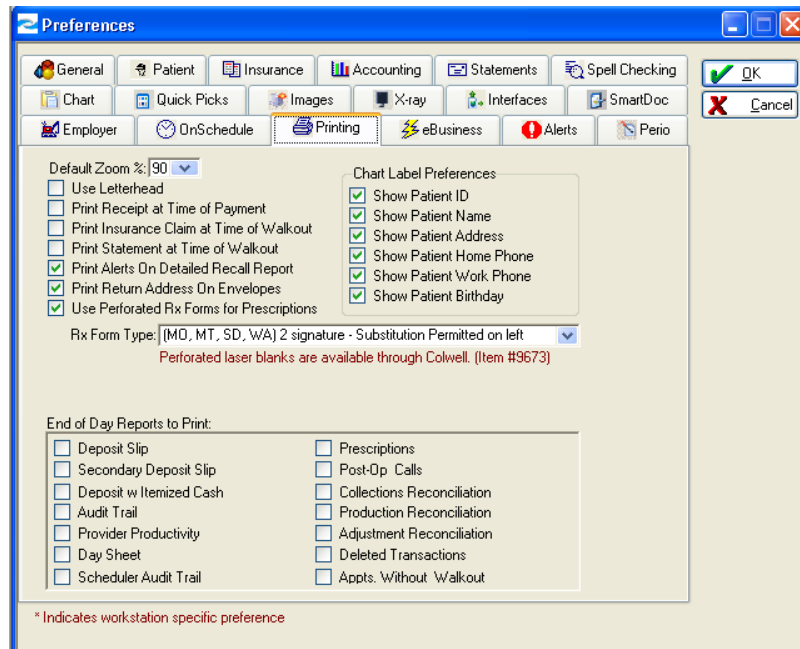
Use Summary from First Tooth – Select this option to apply the summary surface information entered for the first tooth in the series to all teeth in the series.

Use Anatomy From First Tooth – Select this option to apply the anatomy detailed surface information entered for the first tooth in the series to all teeth in the series.

Use Detail Pattern From First Tooth – Select this option to apply the detail pattern surface information entered for the first tooth in the series to all teeth in the series.

Prompt For Details When Anatomy Changes – Select this option to prompt for details when anatomy changes are applied to the selected area.

Chart Labels

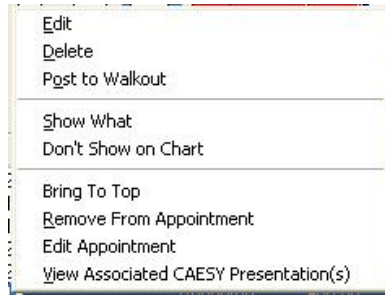


Under **Preferences | Printing**, select the checkboxes to determine the items that you wish to print on your **Chart Labels** by default. Choose from the following: **Patient ID, Patient Name, Patient Address, Patient Home Phone, Patient Work Phone** and **Patient Birthday**.

Use this printing preference for your **Chart, InContact** and **Edit Patient** labels. Your preferred method will appear by default.

When printing labels from the Edit Patient screen, select from the following checkboxes now available in the Edit Chart Label area: **Patient ID, Name, Address, Work Phone, Home Phone** and **Birthday**.

Right-Click Menu Options in Chart

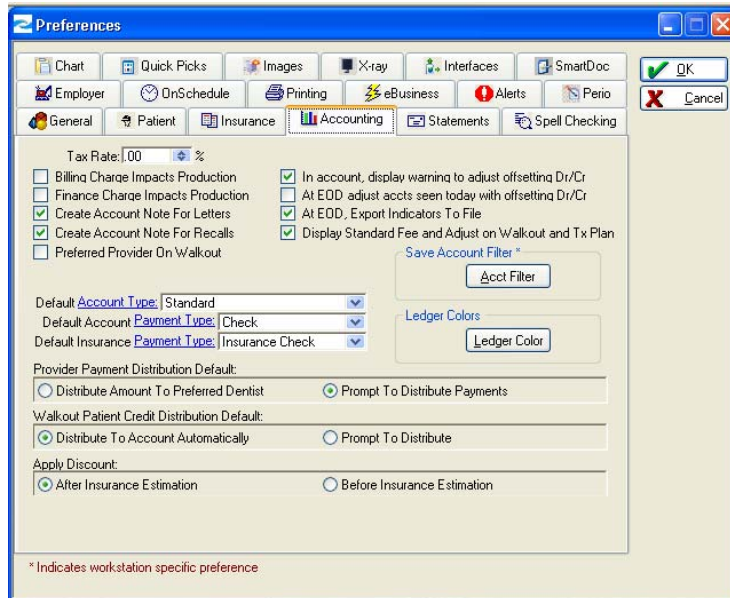


Edit Appointment - Edit appointments from the **Chart** ledger. Use the right-click menu in the chart to edit appointments in **OnSchedule**.

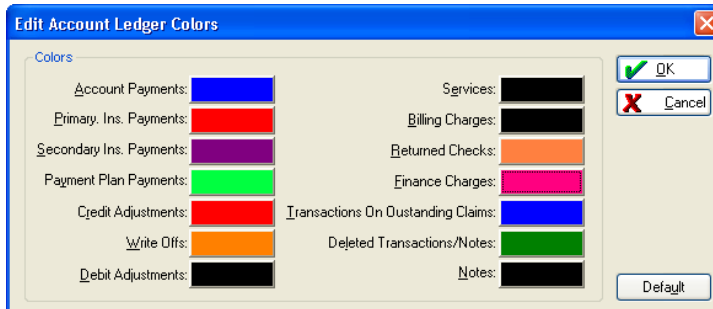
View Associated CAESY Presentation(s) – Select this option to preview any CAESY Patient Education videos that may be associated with the service code selected in the chart ledger. *See the CAESY section of this overview for more information on CAESY Presentation assignments.*

Accounting

Preferences



New to the **Accounting** tab is the **Ledger Color** button. Select the **Ledger Color** button to select the colors to be associated with the different entries on the **Account** Ledger.



The Account Ledger categories - Account Payments, Primary Insurance Payments, Secondary Insurance Payments, Payment Plan Payments, Credit Adjustments, Write Offs, Debit Adjustments, Services, Billing Charges, Returned Checks, Finance Charges, Transactions On Outstanding Claims, Deleted Transactions/Notes, Notes.

To set the color, select the colored area. The **Color** window opens. Use your mouse to select the color desired. Select **OK** to use the selected color.

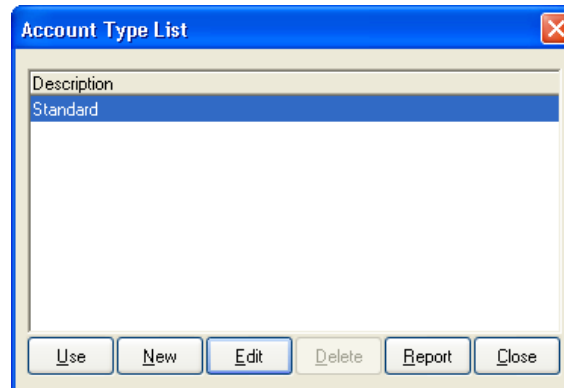
Select **OK** to save your color choices. Select **Cancel** to close the window without saving. Select the **Default** button to use the default colors for all options.

Default Account Type – Use the drop-down arrow to select the Account Type default setting.

EagleSoft Tip

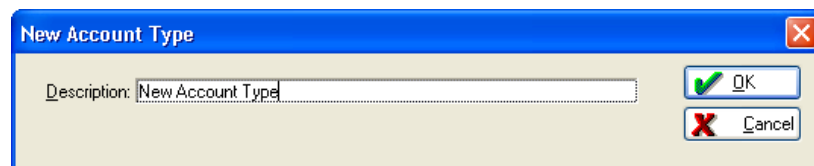
All existing records will be classified as Standard.

To add or edit an **Account Type**, select the hyperlink **Account Type** or go to **Lists | General Setup | Account Type**. The following window appears



Select the **Use** button to apply the selected **Account Type**. Select the **New** button to create a new **Account Type**. Select the **Edit** button to edit the selected **Account Type**. Select the **Report** button to view the **Account Type** report. Select the **Close** button to close the window without applying an **Account Type**.

The following is an example of the New Account Type window.



The Accounts Receivable by Responsible Party and Delinquent Accounts Report can be filtered by Account Type.

To designate an **Account Type**, select the **Preference** button on the specific **Patient's Account**.

Use the drop-down list to select the Account Type desired from the available options.

Modify Completed Service

In the **Account**, you can modify the **Estimated Primary Insurance** and **Estimated Secondary Insurance** amounts on completed services.

In the **Account** screen, double-click on the desired service. In the **Estimated Prim** and **Estimated Sec** area, select inside the field to edit the amount displayed. The **Estimated Patient** amount will adjust accordingly. Select **OK** to save the new estimated amounts. Select **Cancel** to close the window without saving.

Patient Transfer With History

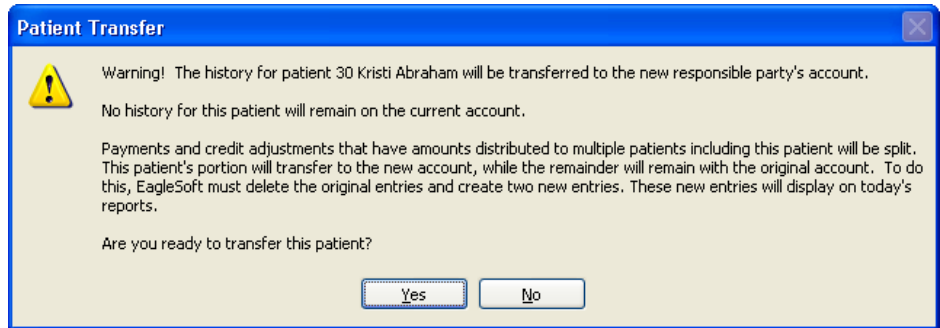
Patient Transfer now offers the option to include past transaction history. In **Utilities**, select **Patient Transfer | With History**.

EagleSoft Tip

When transferring a patient with history, it is recommended that you reprint the patient's last statement prior to transferring. After the patient has been transferred, the system doesn't recognize that this account has ever had a statement generated.

EagleSoft Tip

For example, let's say you walked out a patient with multiple services and one service was incorrect. You can now delete the service and create a separate walkout using the correct service. Print a new walkout with the three original services and the newly corrected service.



During the patient transfer, you will receive the above warning pertaining to the transfer of patient history. An **Account Note** will be created in the new account.

Print Today's Receipt

In the **Account** window, select the **Today's Receipt** button at the bottom of the screen to preview or print a report of receipts for that **Account** and date.

View Walkout

From the Account ledger, select several services, payments and adjustments to include on a standard **Walkout**. Use the right-click menu to print a walkout.

Multi-select

Select multiple items within the ledger by using the **Shift** or **Ctrl** key. Use the **Shift** + mouse to select items in a series by selecting the first and last item in the list. Use the **Ctrl** + mouse to select multiple items individually.

Claim and Service Management

Date	User	Patient	Provider	Type	Description	Toolh	S
3/16/2005	GGY	Angela	RKM	Service	D2750 CRC/OWN	29	
	GGY	Angela	GGY	Service	D6750 CRC/NOBLE ME	18	
3/8/2005	GGY	Angela	GGY	Service	D6059 4BL METAL CR	19	
	GGY	Angela	GGY	Service	D2750 CRC/OWN	29	
4/20/2004	BAB	Angela	DFD	Service	D1204 TOF PRDPHY		
	BAB	Angela	DFD	Service	d0274 BITE		
	BAB	Angela	GGY	Service	d0120 PER		
	BAB	Angela	DFD	Service	d1110 PRC		

- View Distribution
- View Claim
- Adj
- Edit
- Delete
- Filter
- View Walkout
- View Rx History
- View Eligibility
- Expand Ledger
- Adc to Outstanding Claim
- Create New Claim
- View Related Claim Items
- View Related Walkout Items

Manage your claim items more efficiently than ever before. Use the **Account** window to add existing services to a new claim or to an existing claim.

Add to Outstanding Claim

To add an item to an outstanding claim, select the service in the Account ledger. Right-click and select **Add to Outstanding Claim**. The **Add to Outstanding Claim** window appears.

Add to Outstanding Claim

ID: 63 Current Primary Deductible: \$0.00

Name: Angela Abbott

Update Annual Deductible for Patient .00

Select the claim you wish to add the service(s) to:

Date	Primary	Date Submitted	Total Submitted	Paid to Date
			950.00	.00
			900.00	.00
			1,000.00	.00
			950.00	.00
			150.00	.00

Invalid Claim Selection

The provider on insurance (GGY) for this claim does not match the provider on insurance (RKM) for the selected services. Please select a different claim with matching provider on insurance.

OK

The Provider on Insurance on the service and the Provider on Insurance on the existing claim must match. The **Invalid Claim Selection** warning will appear if they do not. Select **OK** to return to the **Add to Outstanding Claim** window.

Select the existing claim from the list. Select the checkbox **Update Annual Deductible for Patient** if applicable. Select the **View Claim** button to preview the specifics of the selected claim. Select **OK**. The **Recreate Claim** window appears.

EagleSoft Tip
The Provider on Insurance drop-down list will only appear when using the preference for Provider On Insurance in the Accounting tab.

Recreate Claim

Patient: 63 Angela Abbott Age: 49 Pat. Due Now: \$3,055.00

Resp. Party: 63 Angela Abbott Estimated Ins: \$1,000.00

Contract Bal: \$0.00

Changing Provider On Insurance will not impact Collections Go To

Provider On Insurance: George Young, DDS

Estimation Options

Estimate Insurance Based On Current Benefits

Estimate Insurance Based On Original Claim

Do Not Estimate Insurance

Recreate 2ndary Claim With No Est Insurance

	Primary	Secondary
Original Benefits:	\$0.00	\$0.00
Original Deductible:	\$0.00	\$0.00
New Benefits:	\$0.00	\$0.00
New Deductible:	\$0.00	\$0.00

Provider	Date	Service	Description	Tth	Surface	Fee	Est Primary	Est 2ndary
GGY	3/8/2005	D2750	CROWN	29		950.00	0.00	0.00
Totals:						950.00	0.00	0.00

Select the appropriate **Estimation Options**. Select **OK** to recreate the claim. The **Insurance Questions** window appears.

Insurance Questions

Patient ID: 63 Angela Abbott
 Resp. Party ID: 63 Angela Abbott

Print Now Print Later Submit Electronically Submit Manually

Insurance Form: Blank ADA - 2000

Questions:

Authorize Payment To Office: Yes
 Prior Authorization #: _____
 First Visit Date Current Series: 00/00/0000
 Place of Treatment: Office Hospital ECF Other
 *If Treatment not Performed at Practice, Enter Address, City, State and Zipcode where Treatment was Performed.
 Address: _____
 City: _____ State: _____ Zip: _____
 Radiographs or Models Enclosed: Yes How Many: _____
 Is Treatment for Orthodontics: Yes
 Date Placed: 00/00/0000
 Months Treatment Remaining: _____
 If Prosthesis, Is This Initial Placement: Yes No N/A
 If No, Reason for Replacement: _____

Select the appropriate **Print Claim** option. Select the desired **Insurance Form**. Review the defaulted information under **Questions**. Select **OK** to finish.

Recreate Claim

To create a new claim from previously walked out services, select the desired services in Account.

EagleSoft Tip
Multiple services can be selected, provided they are not tied to an existing claim. However, multiple Providers on Insurance can be selected for this option.

Date	User	Patient	Provider	Type	Description	Tooth	S
3/16/2005	GGY	Angela	RKM	Service	D2750 CROWN	29	
	GGY	Angela	GGY	Service	D6750 CROWN	18	
3/8/2005	GGY	Angela	GGY	Service	D6059 4BL METAL CR	19	
	GGY	Angela	GGY	Service	D2750 CROWN	29	
4/20/2004	BAB	Angela	DFD	Service	D1204 TDF PROPHY]		
	BAB	Angela	DFD	Service	d0274 BITE		
	BAB	Angela	GGY	Service	d0120 PER		
	BAB	Angela	DFD	Service	d1110 PRC		

Right-click and select **Create New Claim**. The **Recreate Claim** window appears.

Recreate Claim

Patient: 63 Angela Abbott Age: 49 Pat. Due Now: \$3,055.00 OK
 Resp. Party: 63 Angela Abbott Estimated Ins: \$1,000.00 Cancel
 Contract Bal: \$0.00

Changing Provider On Insurance will not impact Collections Go To
 Provider On Insurance: George Young, DDS

Estimation Options

Estimate Insurance Based On Current Benefits
 Estimate Insurance Based On Original Claim
 Do Not Estimate Insurance
 Recreate 2ndary Claim With No Est Insurance

	Primary	Secondary
Original Benefits:	\$0.00	\$0.00
Original Deductible:	\$0.00	\$0.00
New Benefits:	\$0.00	\$0.00
New Deductible:	\$0.00	\$0.00

Provider	Date	Service	Description	Tth	Surface	Fee	Est Primary	Est 2ndary
GGY	3/8/2005	D2750	CROWN	29		950.00	0.00	0.00

Totals: 950.00 0.00 0.00

Select the appropriate **Estimation Options**. Review the displayed information. Select **OK** to create the claim. The following window appears:

Insurance Questions

Patient ID: 63 Angela Abbott OK
 Resp. Party ID: 63 Angela Abbott Cancel

Print Now Print Later Submit Electronically Submit Manually

Insurance Form: Blank ADA - 2000

Questions:

Authorize Payment To Office: Yes
 Prior Authorization #:
 First Visit Date Current Series: 00/00/0000
 Place of Treatment: Office Hospital ECF Other
 *If Treatment not Performed at Practice, Enter Address, City, State and Zipcode where Treatment was Performed.
 Address:
 City: State: Zip:
 Radiographs or Models Enclosed: Yes How Many:
 Is Treatment for Orthodontics: Yes
 Date Placed: 00/00/0000
 Months Treatment Remaining:
 If Prosthesis, Is This Initial Placement: Yes No N/A
 If No, Reason for Replacement:

Select the appropriate **Print Claim** option. Select the desired **Insurance Form**. Review the defaulted information under **Questions**. Select **OK** to finish.

Group Related Transactions

This new feature allows you to toggle between **Related Transactions**. The **View Related Transactions** option will be disabled for the following:

- More than one transaction is highlighted
- The highlighted transaction doesn't have a related Claim or Statement



Use the right-click menu in the **Account** and select one of the following related transaction items.

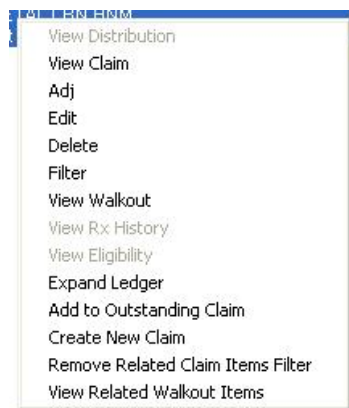
View Related Claim Items – When this option is selected, the account window ledger will be filtered by the claim of the highlighted transaction. All claim items will be displayed including payments, services and notes. When using this option, note the following changes to the Account screen:

- The red text **Running balance is not available when viewing filtered items** will be displayed
- The **Balance** column is not visible from the ledger

View Related Walkout Items– When this option is selected, the Account window ledger will be filtered by the walkout of the highlighted transaction. All walkout items will be displayed including payments, services and adjustments. When using this option, note the following changes to the Account screen:

- The red text **Running balance is not available when viewing filtered items** will be displayed
- The **Balance** column will be removed from the ledger area

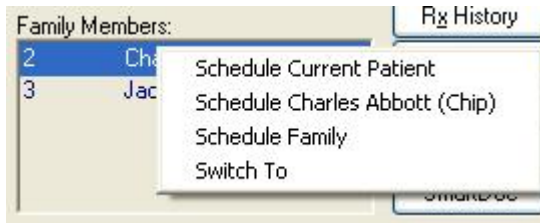
EagleSoft Tip
Creating a new transaction will also remove the Related Claim Items filter from the Account Screen.



When in **View Related Transactions** mode, use the right-click menu to **Remove Related <Transaction> Items Filter** to return the **Account** to its previous state.

Switch Patient From Family Member

Switch patients from one family member to another in the **Edit Person**. Right-click on a patient in the family member area and select the switch to option.



The selected family member will appear in the **Edit Person** window.

EagleSoft Tip

The **Account** button is disabled when the **Edit Patient** window is accessed from the **Account** window.

Navigation

Access **Account** from the **Edit Patient** screen.



Patient Age

The Patient age will now display on more windows including: **Account**, **Account Payment**, **Insurance Payment**, **Walkout**, **Treatment Plan**, **Appointments** and more.

Employer

EagleSoft Tip

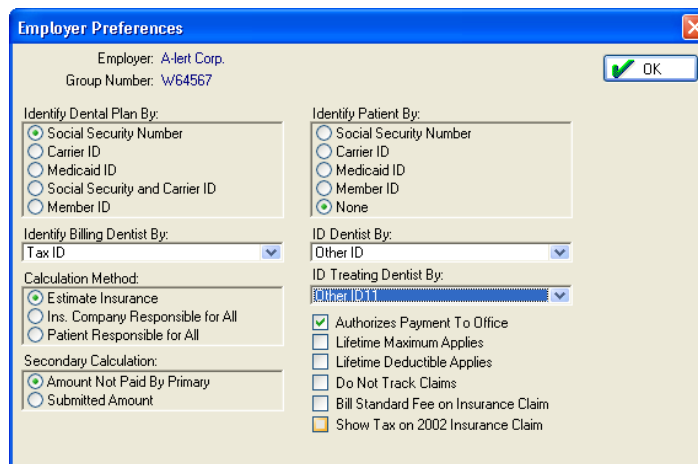
For more information on setting up **Dentist IDs**, consult the **Online Help** file.

EagleSoft Tip

The **Treating Dentist ID** will appear in box 54 on the **ADA 2002 insurance form**.

Treating Dentist ID

Using the **ADA 2002** form, denote both the **Dentist ID** and **Treating Dentist ID**. The **Treating Dentist ID** is used primarily for insurance companies that require the treating dentist to be identified differently than the dentist and billing dentist.



In the **Lists** menu, select **Employers/Coverage List**. Edit the desired employer. Select the **Preferences** button. Use the drop-down list to select the **ID Treating Dentist By** identification.

Use the **Global Employee Preferences** under **Utilities** to set the **Treating Dentist ID** for all **Employers**.

Use the **Employee Preferences** under **File** to set the **Treating Dentist ID** for all new **Employers**.

Simplify Transactions

EagleSoft Tip
Exploding Codes will only repeat the last service from the Exploding Code.

Last Transaction Key

Select the F5 key to repeat the last transaction. This option is available in the **Treatment Plan**, **Walkout** and **OnSchedule**.

From the **Treatment Plan** or **Walkout**, enter the desired service. Tab to the **Service ID** field and select the F5 key to repeat the transaction.

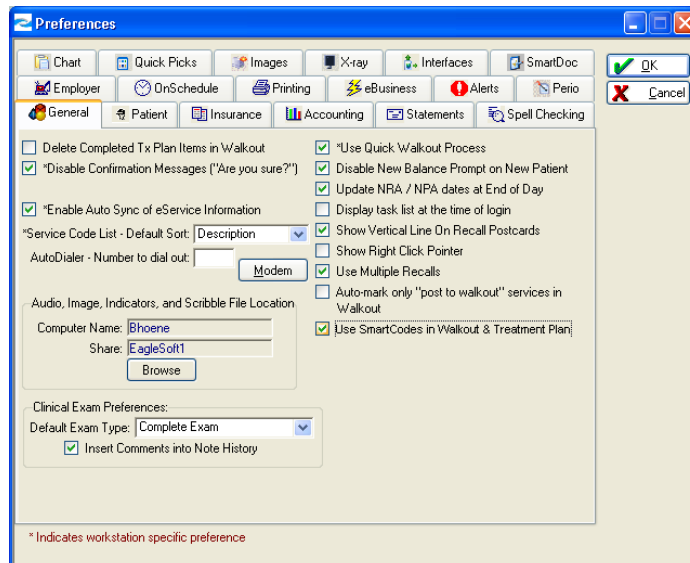
From **OnSchedule**, enter the desired service and select the F5 key. The **Enter Service** window appears.

Smart Codes on Walkouts

This feature allows you to use **Smart Code** functionality in the **Walkout** and **Treatment Plan** windows. **Smart Codes** are self-correcting treatment codes that accommodate for multiple root and surface information.

In the **General Preferences** tab, select the checkbox **Use SmartCodes in Walkout and Treatment Plan**.

EagleSoft Tip
The entire Patterson EagleSoft manual is available in the Help file. Select the F1 key to launch the Help file. Select the Index tab and enter a keyword to look up a specific topic.



For more information on setting up Smart Codes, select **F1** to consult the Online Help information.

Edit Patient

Patient editing capabilities have been expanded in **Clinical**. The Edit Patient option is now available in **Clinical Exam, Advanced Imaging, SmartDoc, Chart, Perio** and **PSR**.

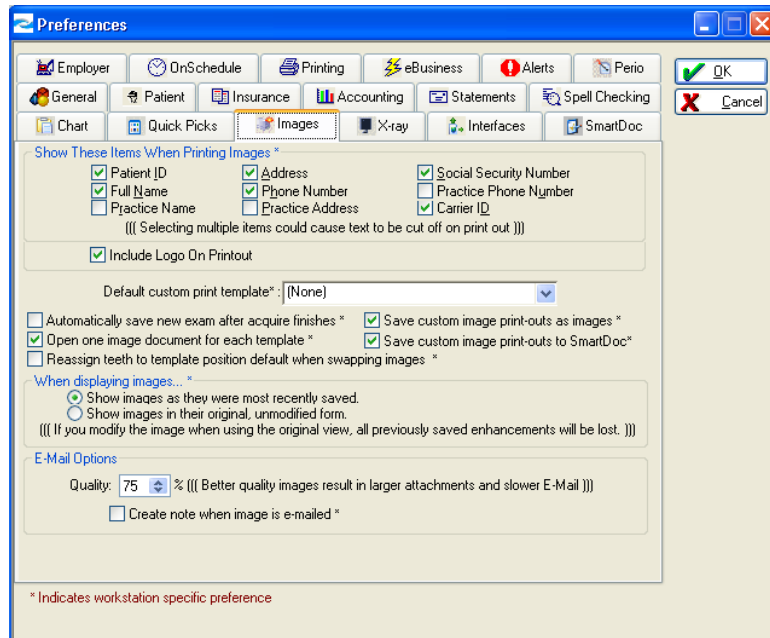
Reports

New reports have been added to the **Reports** menu.

Outstanding Claims by Aging Category	Report outstanding insurance claims by 0-29, 30-59, 60-89 or over 90 days
Digital Image Exam Master	Shows all digital image exams for selected date range
Digital Image Exams for Patient	Shows all digital image exams for a selected patient and selected date range

Advanced Imaging

Preferences



EagleSoft Tip

When deleting a currently selected template in Custom Print, a message appears informing you that the Print layout will be reset upon deletion of the current template.

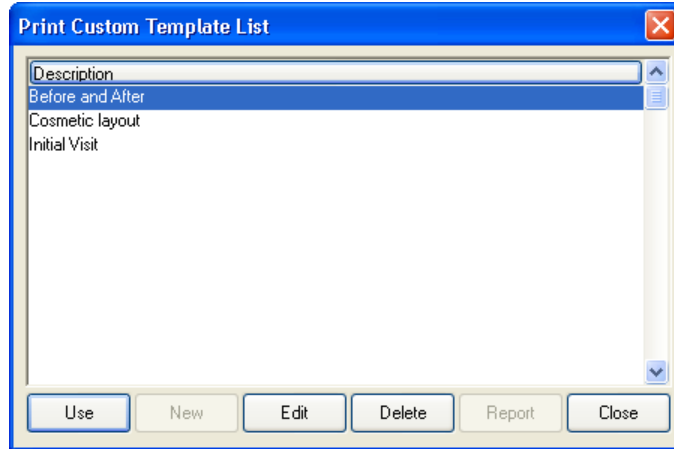
Include Logo On Printout – Select this checkbox to print the Patterson **EagleSoft** logo on printed image reports.

Custom Image Print Templates

Create, edit and use an unlimited number of customizable templates for Custom Image Printing.

EagleSoft Tip

Using the blank layout, arrange your images as desired and select Template / Save As to create a new template.

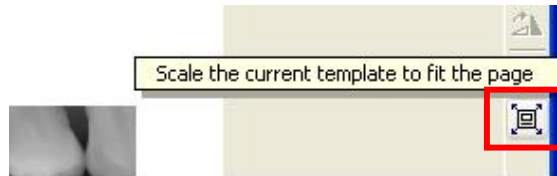


In **Custom Print**, select the **Template** button to view the **Custom Print Template List**. Select the **Use** button to use the selected template. Select the **New** button to reset the current template. Select the **Edit** button to make changes to the current template. Select **Delete** to delete the current template. Select the **Close** button to close the window.

In the **Image Preferences** tab, use the drop arrow to select a default template for **Custom Image Printing**.

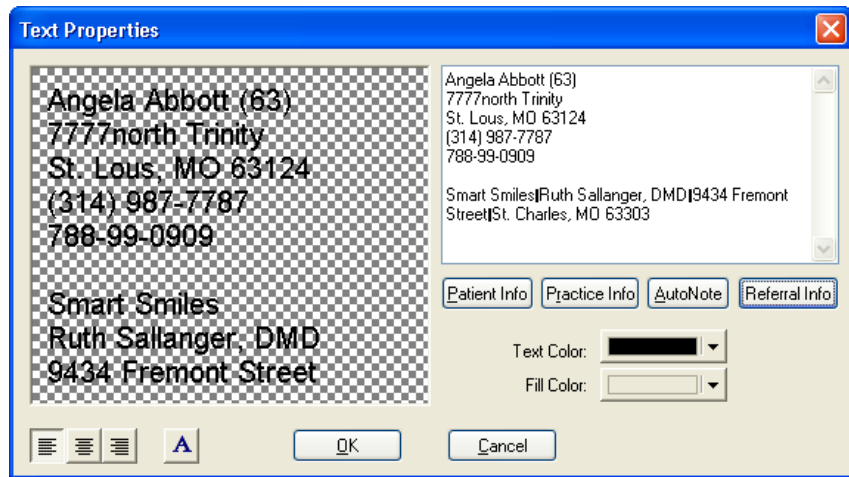
Templates and Resolution

Custom Image Print now operates outside of the Printer resolution for new templates created in 12.00. Previous saved templates will need to be scaled to the appropriate size prior to printing. To facilitate this, we have included a scale button in **Custom Print**.



Use this button to automatically resize the current template to fit the print area.

Referral Merge for Custom Image Printing



Custom Printing allows for Referral Information to be included. In the Text Properties, select the Referral Info button. Select the proper Referral Provider from the Referral Recipients List.

Auto-Take

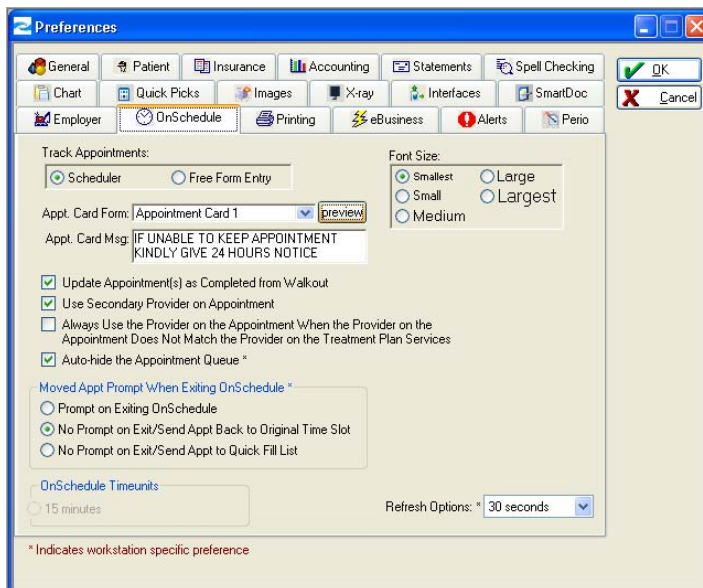
Select the **Ctrl+T** keys while acquiring images in an image template to toggle the Auto-Take between off and on. This works in both **Advanced Imaging** and **Clinical Exam**.

Import Images

Import .eop extension images directly into Advanced Imaging.

OnSchedule

Preferences



In the **OnSchedule** Preferences, use the radio buttons to select the font size for your **OnSchedule** appointments. Select from the following options: **Smallest**, **Small**, **Medium**, **Large** and **Largest**. These workstation-specific font sizes only affect viewing the **OnSchedule** area.

All Appointments on Walkout

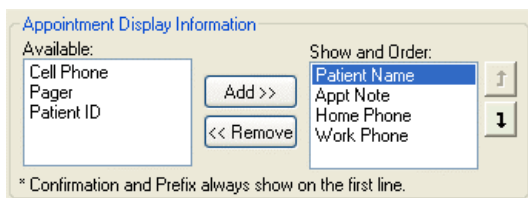
On the **Walkout Statement**, the area at the bottom displays all future family appointments instead of just the next preventive and next regular appointments. The **Next Preventive** and **Next Regular** columns have been replaced with a **Next Appointment** column leaving room for an extra row of appointments. This allows room for a total of 12 future family appointments. In the case where a family has more than 12 appointments, only the first 12 will display. For that reason, the appointments will be sorted by date. (If sorted by Patient/Date, there is a possibility of one or more patients not appearing at all.)

EagleSoft Tip

If you have elected not to display patient name in the Appointment Setup, using the Ctrl+H keys will not display the names on the appointments.

Names on Appointments

Patient Name is now an option in the Appointment Display Information.



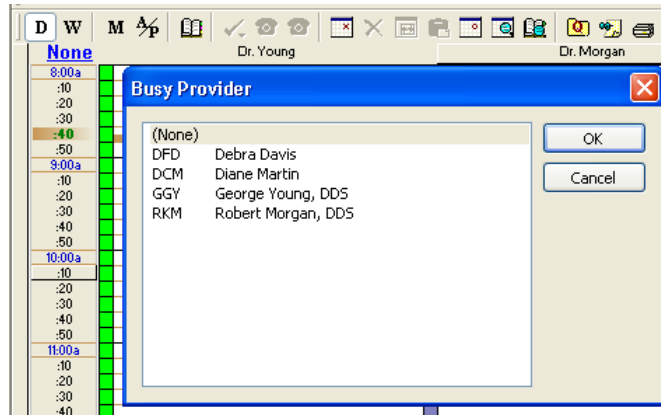
Use the Ctrl+H keys to toggle between displaying the Patient Name in **OnSchedule**. If patient names are hidden at the time that **OnSchedule** is printed, patient names will not appear on the printed copy.

Busy Bar

This feature allows the user to see at a glance if a provider is free or busy during a specific time slot.

EagleSoft Tip

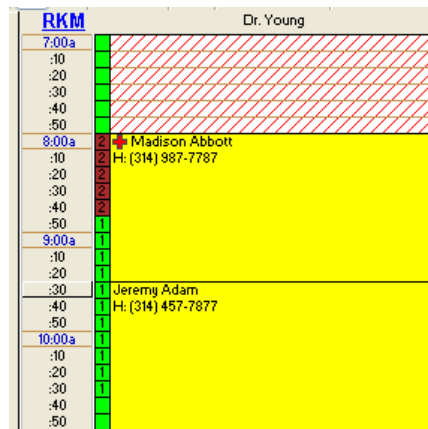
Multiple Doctor Practices: When you initially access the Busy Bar, the hyperlink setting will display as NONE.



In **OnSchedule**, select the **<<Currently Selected>>** hyperlink located at the top of the Time column. The **Busy Provider** window appears. Select the provider's name from the list and select the **OK** button. Select the **Cancel** button to close the window without selecting a provider. The selected provider's ID appears above the time column.

EagleSoft Tip

In the example image, the Primary and Secondary provider symbols are 1 and 2 for the sake of illustration. The dark color in the example image is the double-book color.



The primary and secondary provider symbols, defined in the **OnSchedule Setup**, are used to display when the provider has appointments scheduled for that time. The primary symbol is used when the currently selected provider is the primary provider on an appointment and secondary symbol when they are the secondary provider on an appointment. The double/triple booking information displays as the color defined in the **OnSchedule Setup**. *Note: Mouse over the double- and triple-book areas to display all the booking information for all available providers.*

OnSchedule Activities Toolbar

EagleSoft Tip

The Activities Toolbar is not View specific.

Navigate more fluidly from **OnSchedule** with the **OnSchedule Toolbar**. The **OnSchedule Toolbar** is fully customizable from the right-click menu. This toolbar is not View specific.

Patient information is based on the currently selected appointment – if no appointment is currently selected, it prompts the user to select a patient.

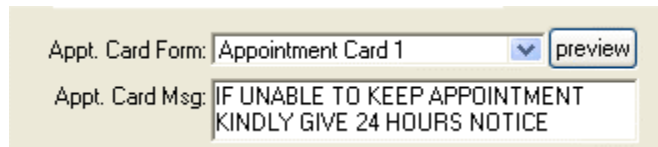
Select from the following buttons:

Account	Lab Tracking	Prescriptions
Edit Patient	Walkout	Chart
Clinical Exam	Perio	PSR
Vw Images	Note History	eReferral
Practice Management	Patient History	Treatment Plan
Claims	Reports	Medical History
SmartDoc	Registration	

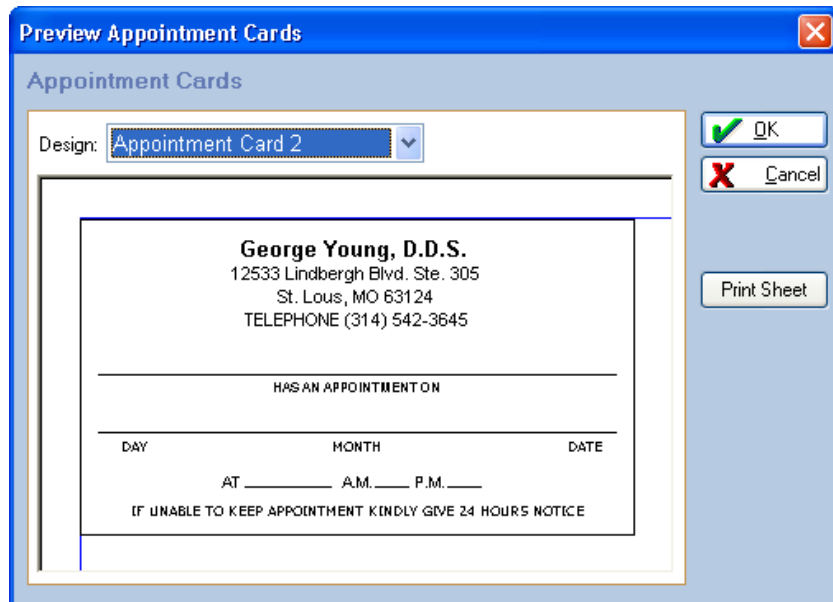
Appointment Cards

EagleSoft Tip
Consult the current
Hardware Requirements
for a list of suitable label
printers for printing
Appointment Cards.

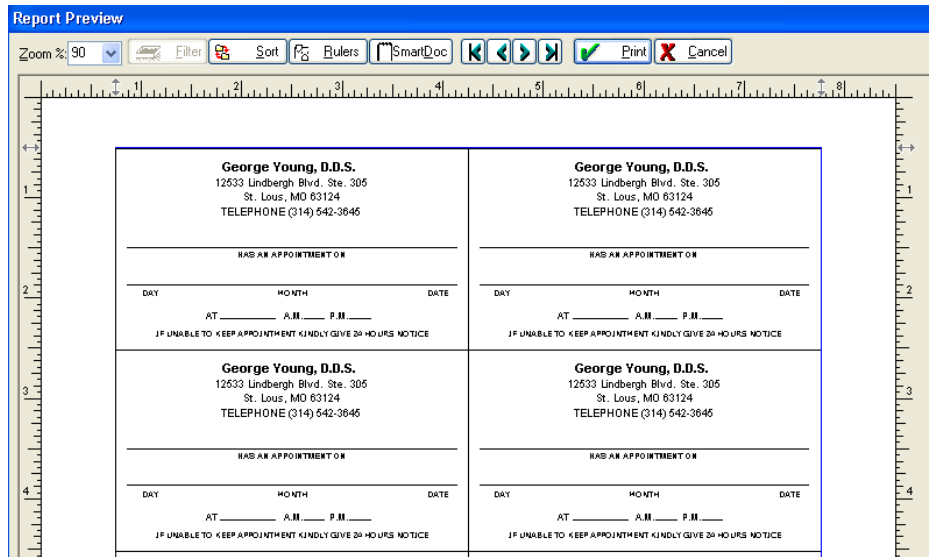
In **Preferences | OnSchedule**, use the drop-down list to designate your desired Appointment Card form. Enter an Appointment card message in the Appt. Card Msg box.



Use the **Preview** button to view the templates.



Use the Design drop-down list to select from the available design options. Select the **OK** button to save the selected options. Select the **Cancel** button to close the window without saving. Select the **Print Sheet** button to launch the print preview window.



Select the **Print** button to print the sheet of cards. Select the **SmartDoc** button to send this file to SmartDoc. Select the **Cancel** button to close the window without printing.

EagleSoft Tip
Appointment Cards can be printed from the Walkout Processing screen under Next Preventive Appointment.

In **Printer Administration**, there is an option to add the appropriate printer for printing **Appointment Cards**.

To print an **Appointment Card**, select the **Print Card** button on the **Edit Appointment** window. The **Print Card** button requires the appointment to be saved when clicked for a new or updated appointment. There is no print preview available.

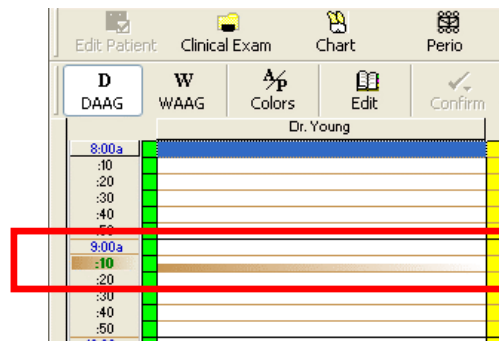
You can also print an appointment card from the main **OnSchedule** window from the right-click menu. A **Print Appointment Card** option appears under **Appointment Services**.

Another way to access the **Appointment Card** is to right-click the **Next Prev** or **Next Reg** appointment area in **Edit Patient**. The menu to print an appointment card is displayed.

Current Time Indicator

EagleSoft Tip
The Current Time Indicator does not display in the Month-At-A-Glance mode.

The Current Time Indicator in **OnSchedule** allows you to note the time at a glance. The gradient brown line appears in **OnSchedule** on the appropriate time block.



The current time is determined by your computer time.

Month At A Glance

In **Month At A Glance** mode, each day shows a summary of appointments, scheduled production, production goal and goal percentage.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26 Closed	27 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	28 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	29 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	30 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	31 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	1 Closed New Years Day
2 Closed	3 24 Appts Sched: \$4200.00 Goal: \$6000.00 %Goal: 70.0%	4 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	5 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	6 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	7 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	8 Closed
9 Closed	10 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	11 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	12 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	13 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	14 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	15 Closed
16 Closed	17 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	18 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	19 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	20 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	21 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	22 Closed
23 Closed	24 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	25 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	26 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	27 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	28 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	29 Closed
30 Closed	31 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	1 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	2 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	3 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	4 0 Appts Sched: \$0.00 Goal: \$6000.00 %Goal: 0.0%	5 Closed
Monthly Totals - January, 2005 Scheduled Amount: \$4200.00 Month Goal: \$126000.00 % of Goal: 3.3%			Selected Range Totals Scheduled Amount: \$0.00 Selected Goal: \$0.00 % of Goal: 100.0%			
New Patients: 2 Appointments: 24 Production: \$0.00			New Patients: 0 Appointments: 0 Production: \$0.00			

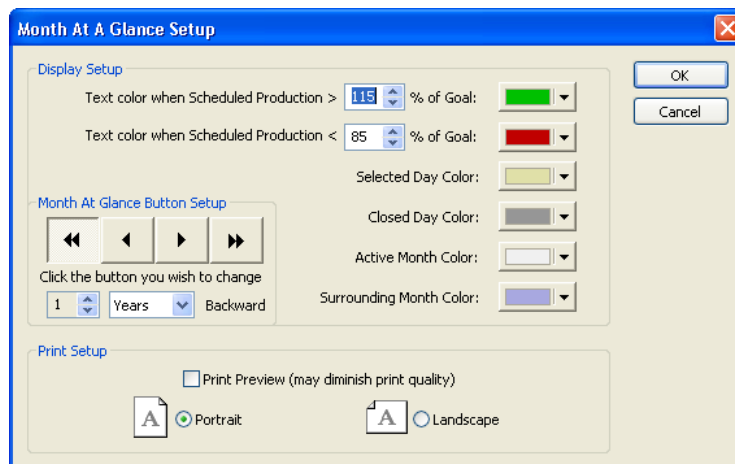
The **Monthly Totals** area displays a summary of the scheduled production, monthly goal, percentage of goal, new patients, total appointments and production totals. The **Selected Range Totals** area displays the same information for the range of days selected. To select a succession of days, press the **Shift** key and select the first and last day in the date range. To select a nonconsecutive series of days, press the **Ctrl** key and select each day in the series.

In the Monthly Totals and Selected Range Totals area, an asterisk precedes production totals. The asterisk denotes that Production amounts shown may not match Accounts Receivable reports. The amounts displayed on the Month At A Glance view are based on date range as opposed to transaction range.

Select the **Setup** icon to open the **Month At A Glance Setup**.

EagleSoft Tip
Different text colors associated with goal percentages provide unmistakable visual indicators of success.

EagleSoft Tip
Month At A Glance is "view specific" so it can be customized for each OnSchedule View.



Under **Display Setup**, select the percentage of **Scheduled Production** at which you wish to use a different colored text. Use the drop arrows to select the colors for **Goal Percentage**, **Selected Day**, **Closed Day**, **Active Month** and **Surrounding Month**.

Under **Month At Glance Setup**, select the amount of time (days, weeks, years) assigned to the quick navigation buttons. The arrows indicate forward and backward from the selected day.

Under **Print Setup**, select the checkbox **Print Preview** to display a preview prior to printing. Select the radio button for **Portrait** or **Landscape**. *Note: This print setup affects your OnSchedule print setup.*

Select **OK** to save and apply your settings. Select **Cancel** to close without saving.

In **Month At A Glance** mode, double-click on the listed **Goal** to view a breakdown of the Scheduled vs Goals totals.

The following is an example of the Scheduled vs Goal window.

Provider	Scheduled	Goal	%Goal
George Young, DDS	\$155.00	\$2000.00	7.8%
Debra Davis	\$935.00	\$1000.00	93.5%
Diane Martin	\$1010.00	\$1000.00	101.0%
Robert Morgan, DDS	\$2100.00	\$2000.00	105.0%

Use the right-click menu feature, **Customize**, to add the **Month At A Glance** icon to your **OnSchedule** tool bar.

Double-click on the Appointments hyperlink to open the selected day in **OnSchedule Day At A Glance**.

Preferred Name on Appointments



The patient's preferred name, as determined in **Edit Patient**, appears on the appointment.

Confirmation Statuses

Multiple Confirmation Statuses help keep your Appointment tracking easy. Use the right-click menu to select from one of the following options:

- | | | |
|------------|-------------|--------------|
| Confirmed | Unconfirmed | Left Message |
| Sent Email | No Answer | Phone Busy |

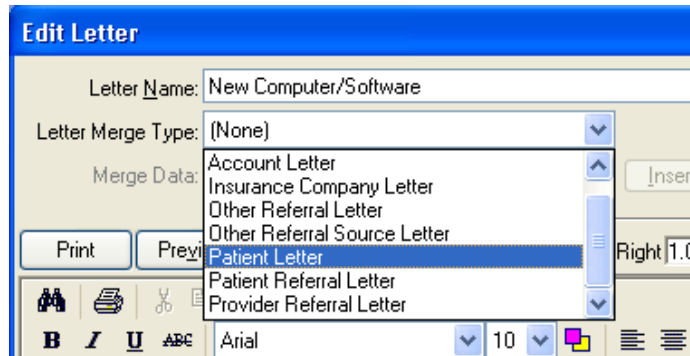
Waiting for Callback Other

Only the **Confirmed** status has an icon that appears on the appointment. To view the **Appointment's Confirmation Status**, double-click to select the appointment or view the right-click menu. The current **Confirmation Status** appears with a checkmark beside it.

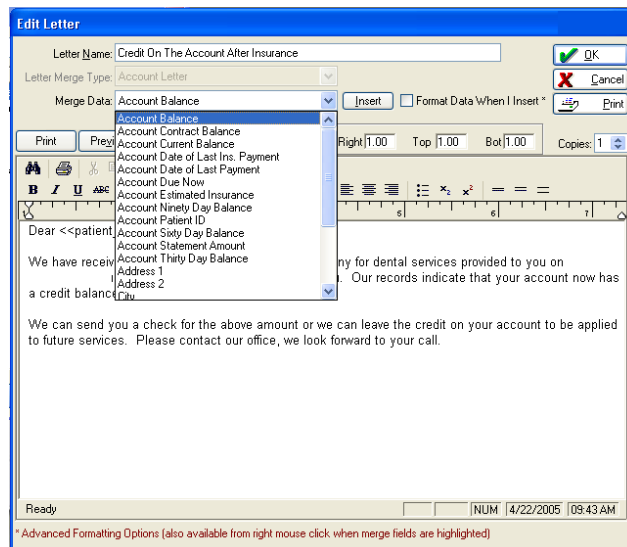
InTouch

New merge types have been added to **InTouch** including **Other Referral Letter** and **Provider Referral Letter**. To clarify the referral letters and their respective functions, use the following guide:

Other Referral Source Letter	Other referral sources/recipients
Other Referral Letter	Referred patients and sources
Provider Referral Letter	Patients and the provider that referred them
Patient Referral Letter	Referred patients

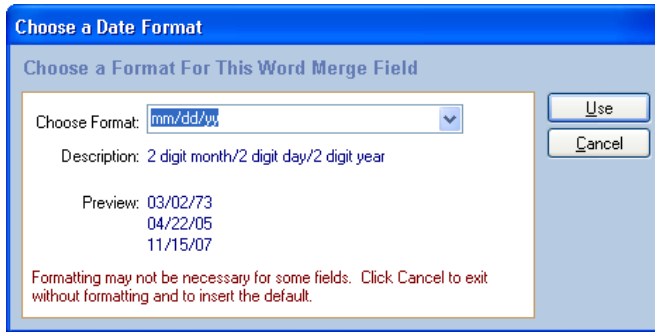


New and more specific merge data is now available for customizing letters.



EagleSoft Tip
The **Format On Insert** checkbox will always default to unchecked.

When using the checkbox **Format Data on Insert**, the **Choose a <>>Format** window appears.



In the **Choose a <<>>Format** window, use the drop arrow to select the format preferred. A preview of the data in the selected format appears. Select the **Use** button.

To format data that has already been inserted, right-click on the data field and select **Format**.

Treatment Plan

EagleSoft Tip
CAESY products are only available to CAESY users. For more information on CAESY, contact your local Patterson Representative.

Informed Consent

In the **Treatment Plan**, you have the option of using the **Informed Consent** report. Select the hyperlink next to **Informed Consent** to view the current form or to acquire a new **Patterson EagleSoft Informed Consent** form.

Under **Presentations Viewed**, select the **View Videos** button. Select the appropriate **CAESY** videos to include with the **Treatment Plan**.

In the **Planned Services** area, the planned services from the selected treatment plan appear with all the pertinent information including Status.

In the **Plan Notes** area, any notes that you have attached to the selected treatment plan will appear. Attached images display in the **Assigned Images** area. In the original treatment plan, select the **Images** button to attach images to a treatment plan.

Select the **Autonote** button to add a narrative to your **Informed Consent**.

Use your compatible electronic signature pad to capture the **Patient** and **Witness** signatures. Select the **Accept Signature** button to add the current signature to the Consent. Select the **Clear Signature** button to remove the current signature.

Select the **Create Consent** button to finalize your Informed Consent form. The **Patient Informed Consent Agreement** appears.

EagleSoft Tip
See the **SmartDoc** section for more information on auto-generating **Informed Consent Agreements** directly into **SmartDoc**.

Services	Agpt Date	Tth	Surf	Status	Proc	Planned Date	Comp. Date	Fee	Est Ins	Est Pat
00750-CROWN	03/04/2003	29		Approved	OCY	02/02/04	3/6/2003	\$900.00	\$0.00	\$900.00
00750-CROWN-PORCELAIN FUSED TO H		12		Approved	OCY	02/02/04	3/14/2003	\$900.00	\$0.00	\$900.00
00740-PONTIC-PORCELAIN FUSED TO H	03/08/2003	19		Approved	OCY	02/02/04		\$900.00	\$0.00	\$900.00
00750-CROWN-PORCELAIN FUSED TO H		20		Proposed	OCY	02/02/04		\$900.00	\$0.00	\$900.00
								Total Proposed/Planned to Without:	\$900.00	
								Total Accepted:	\$2,700.00	
								Total Completed:	\$0.00	
								Total Referred:	\$0.00	
								Total Estimated Insurance:	\$0.00	
								Total Patient Portion:	\$3,600.00	
								Total Plan:	\$3,600.00	

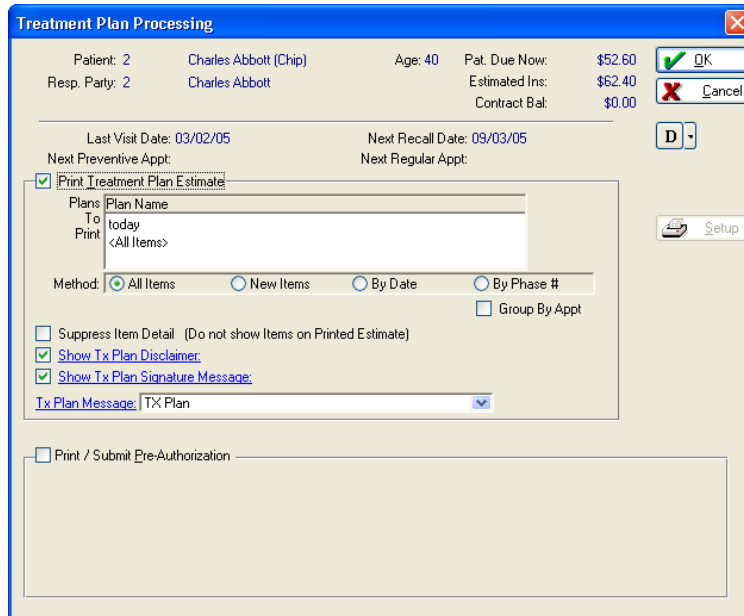
The **Patient Informed Consent Agreement** displays the treatment plan information, any attached narratives and a list of attached videos and any captured signatures. Print a copy of this form for your patient.

Use the **SmartDoc Preference** to auto-generate the **Informed Consent** reports and **Signature** capture in **SmartDoc** upon generation.

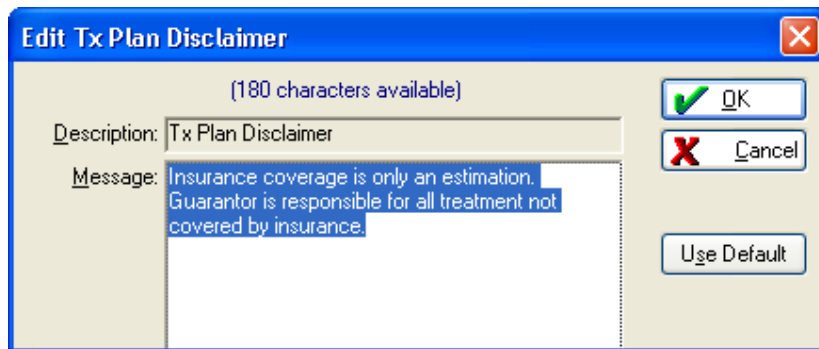
Default Disclaimer

Customize the default disclaimer on the printed **Treatment Plan**. In conjunction with the **Treatment Plan Message**, you now have the ability to attach two customizable messages/disclaimers to your printed Treatment Plans.

You also have the option of using a customizable signature line. This helps you to tailor your printed treatment plans to your practice.

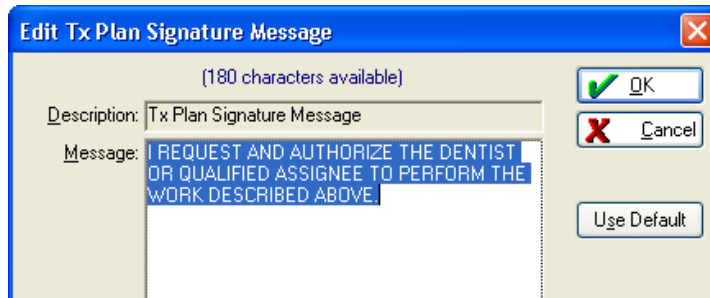


Select the hyperlink **Show Tx Plan Disclaimer** to open the **Edit Tx Plan Disclaimer** window. *See the following example.*



In this window, select in the box to edit the text directly. Select **OK** to save your changes. Select **Cancel** to exit the window without saving. Select **Use Default** to use the default note.

Select the hyperlink **Show Signature Message** to open the **Edit Tx Plan Signature Message** window. *See the following example.*



In this window, select in the box to edit the text directly. Select **OK** to save your changes. Select **Cancel** to exit the window without saving. Select **Use Default** to use the default note.

The following is an example of the customizable notes and messages on the printed treatment plan:

Note: This is only an estimation. Any changes in treatment and/or fees will be discussed with the patient before treatment is performed.	Total Proposed: \$795.00
	Total Completed: \$795.00
	Total Accepted: \$0.00
	Proposed Insurance: \$0.00
Thank you for choosing our office for superior dentistry!	
I CONFIRM THAT THE PROVIDER LISTED ABOVE HAS GONE OVER THE PROPOSED TREATMENT WITH ME AND I UNDERSTAND THE CONSEQUENCES OF HAVING OR NOT HAVING THE SERVICE(S) LISTED PERFORMED.	
Patient or Guarantor's Signature _____ Date _____	

CAESY®

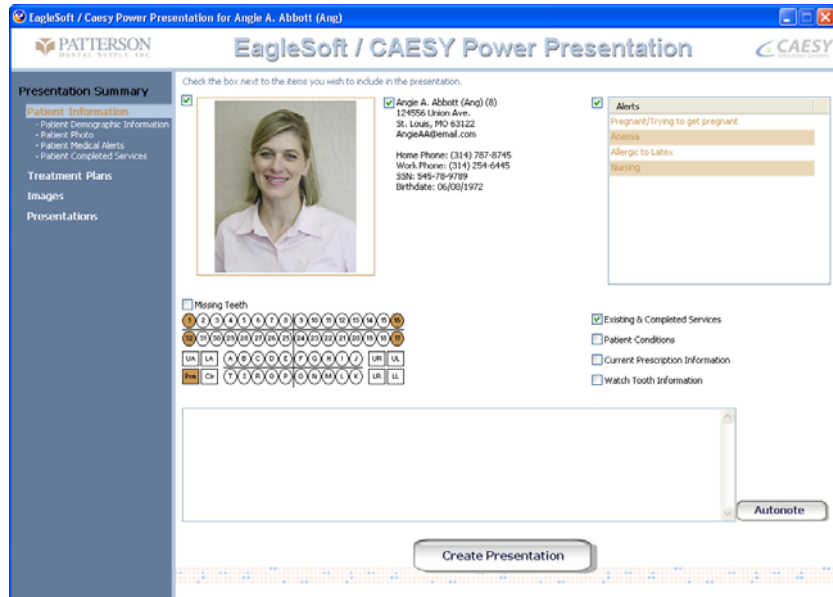
EagleSoft/CAESY Power Presentation

The following option is available for offices using CAESY Edge server and ShowCase 5.0.

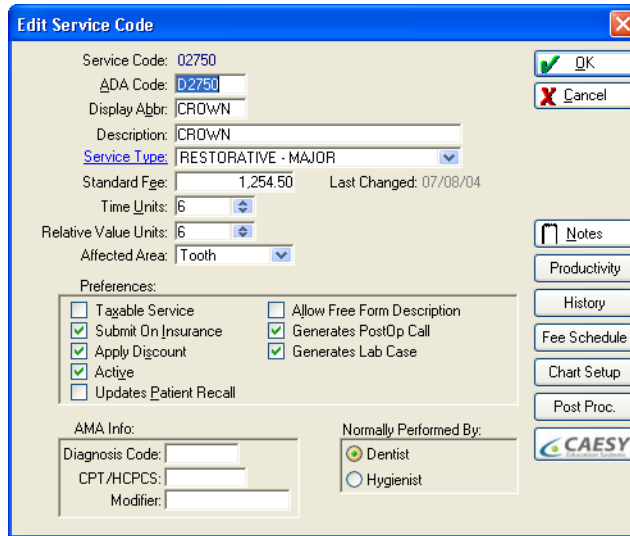
Patterson EagleSoft directly integrates with CAESY presentations from within the software. Create presentations that include patient information, images, treatment plan information and CAESY videos.

Use the treatment plan to create patient education presentations within **EagleSoft**.

EagleSoft Tip
 Selecting the **Patient Education** monitor on the Clinical Graphic Interface launches the **EagleSoft/CAESY Power Presentation**.

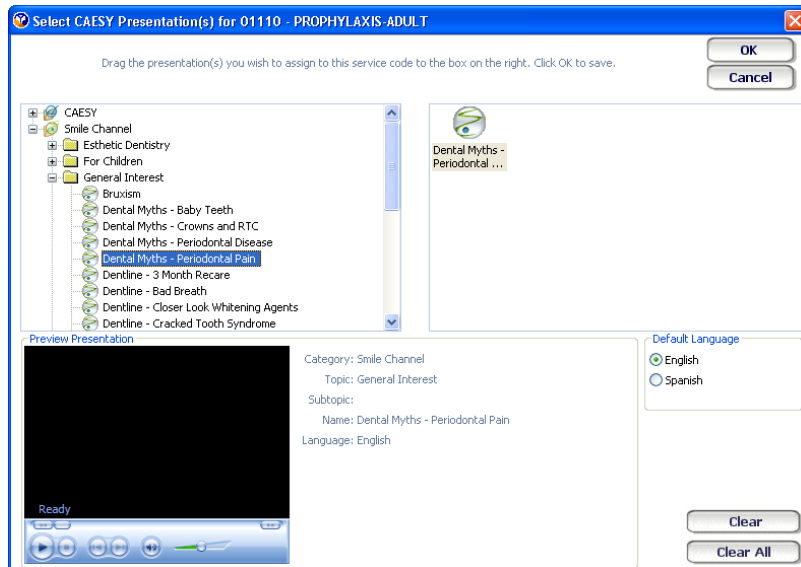


To default a **Patterson EagleSoft** presentation with CAESY for a specific service code, assign the proper CAESY Patient Education videos to your **Service Codes**. Service Codes are found in the **Lists** menu.



Assign CAESY presentations to specific service codes. Select the CAESY button.

The following window appears:



EagleSoft Tip

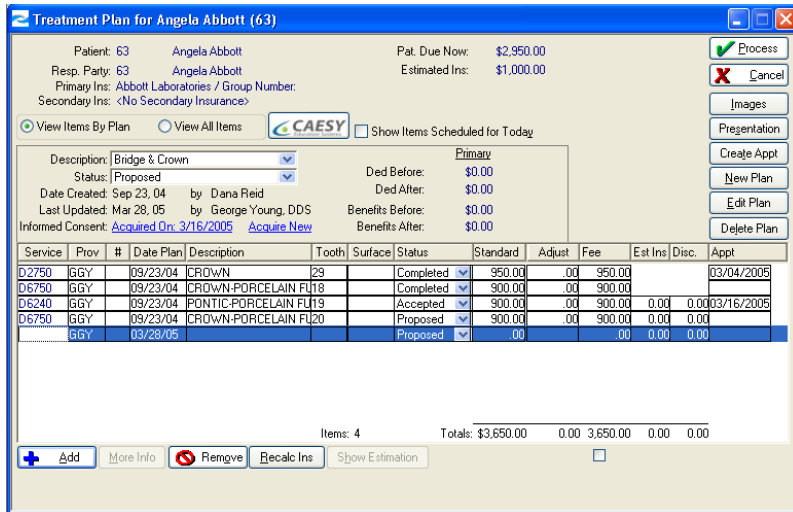
*Service Codes are not considered part of a **Treatment Plan** until the plan has been processed. When adding new Service Codes, you must first process the plan prior to selecting the **CAESY** button if they are to show in the **Power Presentation***

Select the plus sign next to the folder of interest. Select the desired presentation and drag it to the right field.

Double-click on any presentation to preview it in the **Preview Presentation** area. Use the available controls to adjust the presentation volume and play.

Select the radio button for **Default Language**. Select the **Clear** button to remove an added presentation. Select the **Clear All** button to remove all added presentations. Select the **Cancel** button to close the window without adding presentations.

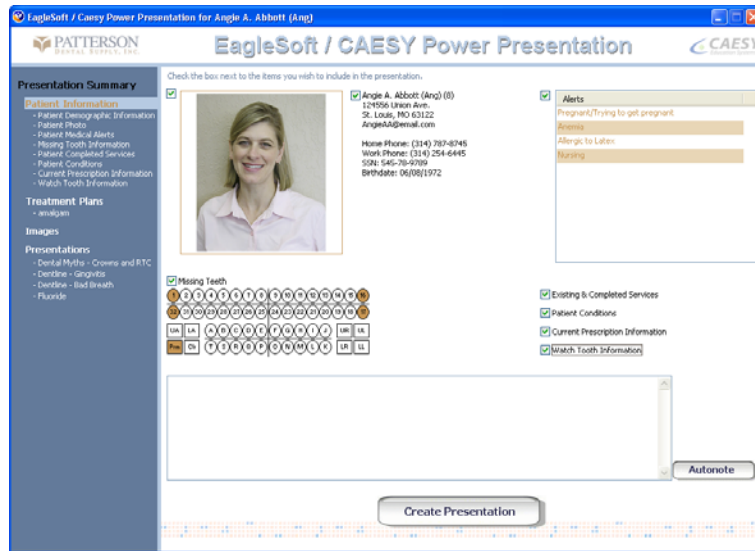
When you have added all the desired presentations to a Service Code, select the **OK** button. Select **OK** to close the Service Code window.



Create **Treatment Plan Presentations** with CAESY Patient Education. In an existing **Treatment Plan**, select the **CAESY** button. Select **Launch CAESY Presentation** window.

The following is an example of Patient Information:

EagleSoft Tip
Your checkbox selections in this section becomes the default selections for future presentations. **Patient Information** is selected by default.



Select the checkboxes of the areas you wish to add to your finished presentation. If the checkbox is unavailable, the selected patient does not have the unavailable information. Select the **Autonote** button to add an existing **Autonote**. In the **Presentation Summary** menu, select **Treatment Plan** to view all plans for the selected patient.

The following is an example of the Treatment Plan option:

EagleSoft Tip
*The current **Treatment Plan** is included by default.*



Select the **Remove Plan** button to remove the plan displayed. Multiple Treatment Plans can be added.

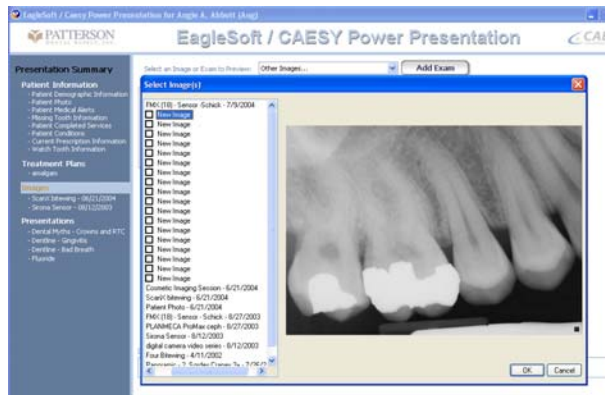
In the **Presentation Summary** menu, include any of the plans listed under **Images**.
The following is an example of the Images option:

EagleSoft Tip
*Highlighting items in the **Presentation Summary** displays their information on the right.
 Highlighting a video presentation displays the video preview.*



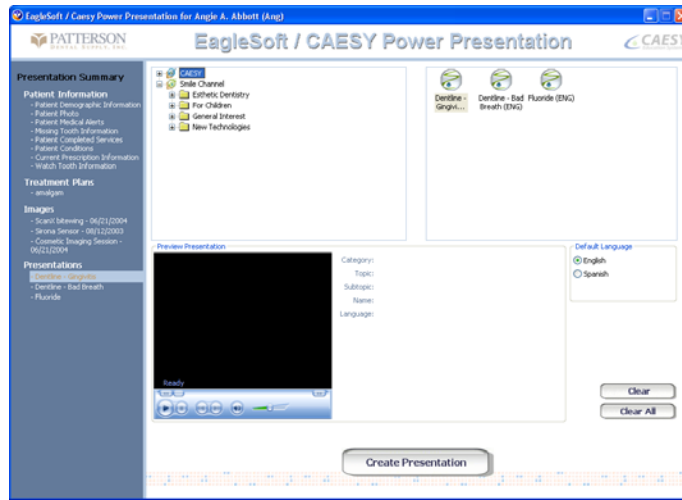
Select the drop-down arrow to select an existing Image Exam. Select the **Add Exam** button. Use the **Remove Exam** button to remove an added exam. Select **Other Exams** from the drop-down list to add individual images. Multiple exams can be added.

The following is an example of the Other Exam option:



Select the checkbox of the desired image and select **OK**. Select **Cancel** to close the window without selecting an image. Multiple images can be added.

The following is an example of the Presentation option.



EagleSoft Tip
Videos that have been attached to service codes from the selected Treatment Plan will be included by default.

In the **Presentation Summary** menu, select any of the videos listed under **Presentation**. To remove a presentation video from the Power Presentation, select the video and drag to the left. To preview a video, double click on the video. Select the radio button under **Default Language**. Select the **Clear** button to remove an added presentation. Select the **Clear All** button to remove all added presentations. Select the **Cancel** button to close the window without adding presentations. When you have added all the desired presentations, select the **OK** button. Multiple videos can be added.

To include additional videos, select the plus sign next to the folder of interest. Select the desired presentation and drag it to the right field. Double-click on any presentation to preview it in the **Preview Presentation** area. Use the available controls to adjust the presentation volume and play. Select the radio button for **Default Language**.

Select the **Create Presentation** button to launch the **Power Presentation**.

CAESY Videos and EagleSoft Service Codes

CAESY Patient Education videos correspond with the following list of ADA Service codes.

Topic	Subtopic	Short Names					
Bridges	Alternatives	Alternatives	D6720	D6721	D6722	D6750	D6792
			D6751	D6752	D6780	D6790	D6791
Bridges	Diagnosis	Bridges	D6720	D6721	D6722	D6750	D6751
			D6752	D6780	D6790	D6791	D6792
Bridges	n/a	Gallery					
Bridges	Post-op Instructions	Permanent Bridges					
Bridges	Post-op Instructions	Temporary Bridges					
Bridges	Procedure	3-Unit Anterior	D6750	D6751	D6752		
Bridges	Procedure	Cantilever	D6720	D6721	D6722	D6750	D6751
			D6752	D6780	D6790	D6791	D6792
Bridges	Procedure	General Care					
Bridges	Procedure	Maryland	D6545				

Bridges	Procedure	Posterior Gold	D6780	D6790	D6791	D6792	D6781
			D6782	D6783			
Bridges	Procedure	Posterior Porcelain	D6750	D6751	D6752		
Crowns	Alternatives	Alternatives	D2740	D2750	D2751	D2752	D2790
			D2791	D2792			
Crowns	Diagnosis	After Root Canal					
Crowns	Diagnosis	All-Porc. Crowns	D2740				
Crowns	Diagnosis	Cracked Tooth					
Crowns	Diagnosis	Cracked Tooth Syn.					
Crowns	Diagnosis	Failing Crown					
Crowns	Diagnosis	Large Cavity					
Crowns	Diagnosis	Worn Fillings					
Crowns	n/a	Gallery					
Crowns	Post-op Instructions	Permanent Crowns					
Crowns	Post-op Instructions	Temporary Crowns	D2970				
Crowns	Procedure	Anterior Porcelain	D2740				
Crowns	Procedure	Core Buildup	D2950				
Crowns	Procedure	PFM Crowns	D2750	D2751	D2752		
Crowns	Procedure	Post & Core	D2954	D2952			
Crowns	Procedure	Posterior Gold	D2790	D2791	D2792	D2780	D2781
			D2782	D2783			
Crowns	Procedure	Posterior Porcelain					
Dentures	Alternatives	Immediate Dentures	D5130	D5140			
Dentures	Alternatives	Overdentures	D5860	D5861			
Dentures	Alternatives	Partial Dentures	D5213	D5214			
Dentures	General	Denture Care					
Dentures	General	Denture Problems					
Dentures	n/a	Gallery					
Dentures	Procedure	Immediate	D5130	D5140			
Dentures	Procedure	Lower Partial	D5213	D5214			
Dentures	Procedure	Overdentures	D5860	D5861			
Dentures	Procedure	Precision Partial	D5862				
Dentures	Procedure	Upper Partial	D5213				
Esthetic Dentistry	All-Porcelain	Bridges	D6740				
Esthetic Dentistry	All-Porcelain	Crowns	D2740				
Esthetic Dentistry	General	Bonding	D2330	D2331	D2332	D2333	D2335
Esthetic Dentistry	General	Home Whitening	D9972				
Esthetic Dentistry	General	The Goal					
Esthetic Dentistry	General	Veneers	D2960	D2961	D2962		
Esthetic Dentistry	General	White Fillings	D2330	D2331	D2332	D2333	D2335
			D2391	D2392	D2393	D2394	
Esthetic Dentistry	Indirect Resin	Advantages					
Esthetic Dentistry	Indirect Resin	Amalgam Probs.	D2140	D2150	D2160	D2161	
Esthetic Dentistry	Indirect Resin	Procedure					
Esthetic Dentistry	Post-op Instructions	Esthetic					
Esthetic Solutions	Closing Spaces	Bonding	D2330	D2331	D2332	D2333	D2335
			D2391	D22392	D2393	D2394	

Esthetic Solutions	Closing Spaces	Veneers	D2960	D2961	D2962		
Esthetic Solutions	General	A Younger Smile					
Esthetic Solutions	General	All-Porc. Crowns	D2740				
Esthetic Solutions	General	Instant Ortho					
Esthetic Solutions	General	Intrinsic Problems					
Esthetic Solutions	General	Lengthening Teeth	D4249				
Esthetic Solutions	General	Makeovers					
Esthetic Solutions	General	Subtle Changes					
Esthetic Solutions	General	White Fillings	D2330	D2331	D2332	D2333	D2335
Esthetic Solutions	Lightening Teeth	Bonding					
Esthetic Solutions	Lightening Teeth	Veneers					
Extractions	Alternatives	Single Tooth	D7140				
Extractions	Alternatives	Wisdom Teeth	D7220	D7230	D7240		
Extractions	Diagnosis	Decay					
Extractions	Diagnosis	Dry Socket					
Extractions	Diagnosis	Perio Disease					
Extractions	Diagnosis	Primary Teeth					
Extractions	Diagnosis	Wisdom Teeth	D7220	D7230	D7240		
Extractions	n/a	Gallery					
Extractions	Post-op Instructions	Extraction					
Extractions	Procedure	Single Tooth	D7140				
Extractions	Procedure	Wisdom Teeth	D7220	D7230	D7240		
Hygiene	Diagnosis	Bad Breath					
Hygiene	Diagnosis	Bruxism	D9940				
Hygiene	Diagnosis	Infec. Endocarditis					
Hygiene	Diagnosis	Oral Piercing					
Hygiene	Diagnosis	Smokeless Tobacco	D1320				
Hygiene	Diagnosis	Snoring					
Hygiene	Diagnosis	Brush Abrasion					
Hygiene	Prevention	Brushing	D1330				
Hygiene	Prevention	Disclosing Tablets					
Hygiene	Prevention	Elect. Toothbrush					
Hygiene	Prevention	Flossing	D1330				
Hygiene	Prevention	Fluoride	D1201	D1203	D1204	D1205	
Hygiene	Prevention	Imp. Regular Exams	D0120	D0140	D0150		
Hygiene	Prevention	Nutrition/Health	D1310				
Hygiene	Prevention	Oral Irrigator	D9630				
Hygiene	Prevention	Perio Involvement					
Hygiene	Prevention	Sealants	D1351				
Hygiene	Prevention	Soft Drinks/Health					
Hygiene	Prevention	Superfloss	D1330				
Hygiene	Prevention	The Hygienist					
Hygiene	Prevention	Ultrasonic Scaling	D4341	D4342			
Implants	Alternatives	Alternatives					
Implants	Diagnosis	Implant Bridge	D6058	D6059	D6060	D6061	D6062
			D6063	D6064			

Implants	Diagnosis	Lower Jaw	D6079	D6078	D6053	D6054	
Implants	Diagnosis	Single Tooth	D6010	D6040	D6050		
Implants	Diagnosis	Upper Jaw	D6053	D6054	D6078	D6079	
Implants	n/a	Gallery					
Implants	Post-op Instructions	Implant Restoration					
Implants	Post-op Instructions	Implant Surgery					
Implants	Procedure	Immed. Placement					
Implants	Procedure	Implant Bridge					
Implants	Procedure	Lower Jaw					
Implants	Procedure	Single—1 Stage					
Implants	Procedure	Single Tooth					
Implants	Procedure	Upper Jaw					
Initial Visit	Common Conditions	Canker Sores					
Initial Visit	Common Conditions	Cold Sores					
Initial Visit	Common Conditions	Endo. Abscess					
Initial Visit	Common Conditions	Gingival Recess.					
Initial Visit	Common Conditions	Pericoronitis					
Initial Visit	Common Conditions	Perio. Abscess					
Initial Visit	Common Conditions	Sensitive Teeth					
Initial Visit	General	Co-Diagnosis					
Initial Visit	General	HIPAA					
Initial Visit	General	Infection Control					
Initial Visit	General	Insurance Info.					
Initial Visit	General	Nitrous Oxide	D9230				
Initial Visit	General	Oral Cancer Exam	D0150	D0120			
Initial Visit	General	Oral Conscious Sed.	D9248				
Initial Visit	General	Rubber Dam					
Initial Visit	X-ray	Bitewing	D0270	D0272	D0274		
Initial Visit	X-ray	Complete Series	D0210				
Initial Visit	X-ray	Panographic	D0330				
New Technologies	Diagnostic	DIAGNOdent					
New Technologies	Diagnostic	Digital X-ray	D0210	D0220	D0272	D0270	D0274
New Technologies	Diagnostic	Intraoral Camera	D0350				
New Technologies	Procedural	Air Abrasion					
New Technologies	Procedural	CEREC CAD/CAM					
New Technologies	Procedural	CompuDent					
New Technologies	Procedural	Hard Tissue Laser					
New Technologies	Procedural	Microdentistry					
New Technologies	Procedural	Power Whitening					
New Technologies	Procedural	Soft Tissue Laser					
Orthodontics	Alternatives	Alternatives					
Orthodontics	Diagnosis	Orthodontics	D8010	D8020	D8030	D8040	D8050
			D8060	D8070	D8080	D8090	
Orthodontics	n/a	Gallery					
Orthodontics	Procedure	Adult	D8040	D8090			
Orthodontics	Procedure	Braces Care					
Orthodontics	Procedure	Child					

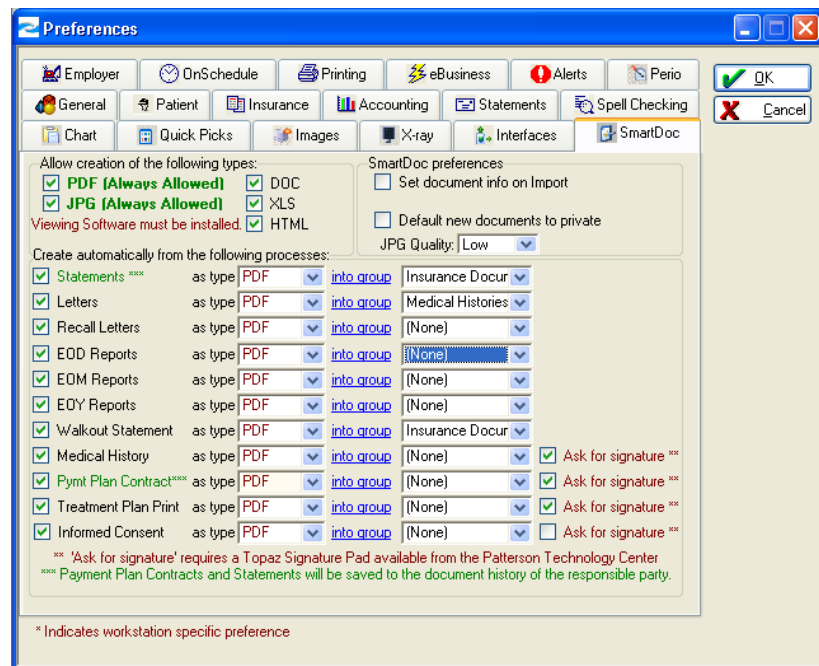
Orthodontics	Procedure	Invisalign					
Pediatrics	Diagnosis	Ankylosis					
Pediatrics	Diagnosis	Bottle Decay					
Pediatrics	Diagnosis	Cavities					
Pediatrics	General	Kirby-Brushing					
Pediatrics	General	Kirby-Flossing					
Pediatrics	Prevention	Braces Care					
Pediatrics	Prevention	Brushing	D1330				
Pediatrics	Prevention	Disclosing Tablets					
Pediatrics	Prevention	Flossing	D1330				
Pediatrics	Prevention	Primary Teeth					
Pediatrics	Prevention	Infant Teeth					
Pediatrics	Prevention	Mouthguards	D9940				
Pediatrics	Procedure	Air Abrasion					
Pediatrics	Procedure	Fillings					
Pediatrics	Procedure	Fractured Anterior					
Pediatrics	Procedure	Pulpectomy	D3220				
Pediatrics	Procedure	Pulpotomy	D3220				
Pediatrics	Procedure	Rubber Dam					
Pediatrics	Procedure	Space Maintainer	D1510	D1515	D1520	D1525	
Pediatrics	Procedure	St. Steel Crowns	D2930				
Periodontal Disease	Alternatives	Alternatives					
Periodontal Disease	Diagnosis	Gingivitis					
Periodontal Disease	Diagnosis	Infec. Endocarditis					
Periodontal Disease	Diagnosis	Perio Disease					
Periodontal Disease	Diagnosis	Smoking and Perio	D1320				
Periodontal Disease	Diagnosis	3 Month Recare	D4910				
Periodontal Disease	n/a	Gallery					
Periodontal Disease	Post-op Instructions	Perio Surgery					
Periodontal Disease	Procedure	Arestin	D4381				
Periodontal Disease	Procedure	Atridox	D4381				
Periodontal Disease	Procedure	Microscope	D0473	D0474			
Periodontal Disease	Procedure	PerioChip	D4381				
Periodontal Disease	Procedure	Periostat	D4381				
Periodontal Disease	Procedure	Root Planing	D4341	D4342			
Periodontal Disease	Procedure	Ultrasonic Scaling	D4341	D4342			
Periodontal Disease	Surgery	Bone Grafting	D4263	D4264			
Periodontal Disease	Surgery	Crown Lengthening	D4249				
Periodontal Disease	Surgery	Flap	D4240				
Periodontal Disease	Surgery	Grafting					
Periodontal Disease	Surgery	Gingivectomy	D4210	D4211			
Periodontal Disease	Systemic Effects	Cardiovascular					
Periodontal Disease	Systemic Effects	Diabetes					
Periodontal Disease	Systemic Effects	Low Birth Weight					
Periodontal Disease	Systemic Effects	Pregnancy					
Periodontal Disease	Systemic Effects	Respiratory Inf.					
Post-op Instructions	General	Esthetic					

Post-op Instructions	General	Extractions	D7140	D7111	D7210	D7220	
			D7230	D7240			
Post-op Instructions	General	Fillings					
Post-op Instructions	General	Implant Restoration					
Post-op Instructions	General	Implant Surgery					
Post-op Instructions	General	Perio Surgery					
Post-op Instructions	General	Permanent Bridges					
Post-op Instructions	General	Permanent Crowns					
Post-op Instructions	General	Permanent Onlays					
Post-op Instructions	General	Root Canal					
Post-op Instructions	General	Temporary Bridges					
Post-op Instructions	General	Temporary Crowns	D2799				
Post-op Instructions	General	Temporary Onlays					
Restorations	Alternatives	Alternatives					
Restorations	Diagnosis	Abfractions					
Restorations	Diagnosis	Cavities					
Restorations	Diagnosis	Failing Amalgam					
Restorations	Diagnosis	How Teeth Decay					
Restorations	Diagnosis	Overhangs					
Restorations	Diagnosis	Worn Anterior Resin					
Restorations	Diagnosis	Worn Posterior Resin					
Restorations	Diagnosis	Worn Silver Fillings					
Restorations	n/a	Gallery					
Restorations	Post-op Instructions	Permanent Onlays	D2542	D2543	D2544	D2642	D2643
			D2644	D2662	D2663	D2664	
Restorations	Post-op Instructions	Temporary Onlays					
Restorations	Procedure	Advantages of Onlays	D2542	D2543	D2544	D2642	D2643
			D2644	D2662	D2663	D2664	
Restorations	Procedure	Amalgam	D2140	D2150	D2160	D2161	
Restorations	Procedure	Anterior Resins	D2330	D2331	D2332	D2335	
Restorations	Procedure	Comparisons					
Restorations	Procedure	Gold Inlay	D2510	D2520	D2530		
Restorations	Procedure	Gold Onlay	D2543	D2544			
Restorations	Procedure	Porcelain Inlay	D2610	D2620	D2640		
Restorations	Procedure	Porcelain Onlay	D2642	D2643	D2644		
Restorations	Procedure	Posterior Resins	D2391	D2392	D2393	D2394	
Root Canal	Alternatives	Alternatives					
Root Canal	Diagnosis	Cracked Tooth Syn.					
Root Canal	Diagnosis	Root Canal	D3310	D3320	D3330		
Root Canal	Diagnosis	Why Crown Needs RTC	D3310	D3320	D3330		
Root Canal	n/a	Gallery					
Root Canal	Post-op Instructions	Root Canal	D3110	D3220	D3330		
Root Canal	Procedure	Apicoectomy	D3410	D3421			
Root Canal	Procedure	Post & Core	D2952	D2954	D2953		
Root Canal	Procedure	Rubber Dam					
Root Canal	Procedure	Single Visit					
Root Canal	Procedure	Two Visits					

TMD	General	Abfractions					
TMD	General	Bruxism	D9940				
TMD	General	Equilibration					
TMD	General	NTI					
TMD	General	Occlusion					
TMD	General	TMD					
TMD	Neuromuscular	NM and TMD					
TMD	Neuromuscular	NM Diagnosis					
TMD	Neuromuscular	NM Treatments					
TMD	Neuromuscular	What is NM?					

SmartDoc

SmartDoc Preferences



Additional documents have been added to the **SmartDoc** preferences for automatic creation. The new options include: **EOD Reports**, **EOM Reports**, **EOY Reports**, **Walkout Statements**, **Treatment Plan Print** and **Informed Consent**.

Merge Creation from SmartDoc

Incorporate all the conveniences of **InTouch** with the advanced capabilities of **SmartDoc**. In **SmartDoc**, use any of your existing **InTouch** letters. Use **Merge** to populate data fields within your letters.

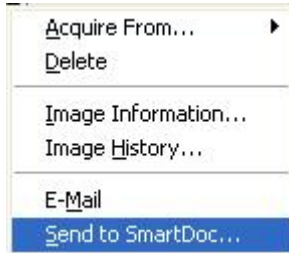


Select the **New** or **Edit** icon from the toolbar (shown above). This allows you to create a new letter or edit an existing letter. Select the checkbox **Format On Insert**. The **Choose a <<>> Format** window displays allowing the user to choose a format

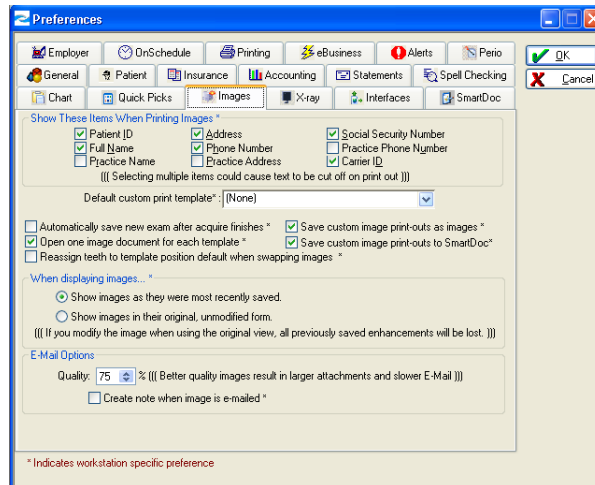
from the drop-down list or enter a format. The data type of the merge column determines the format types available.

Send Image to SmartDoc

In **Advanced Imaging**, right-click on the desired image. Select **Send to SmartDoc** from the menu. The selected image is removed from the image exam and a new image file is created in **SmartDoc**.

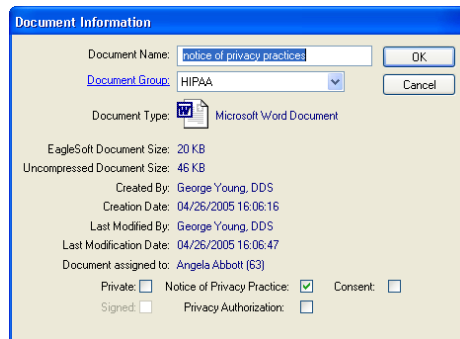


Custom Print to SmartDoc



Under **File | Preferences | Images**, select the checkbox **Save custom image printouts to SmartDoc**. This allows you to generate a **SmartDoc** image file for the selected patient.

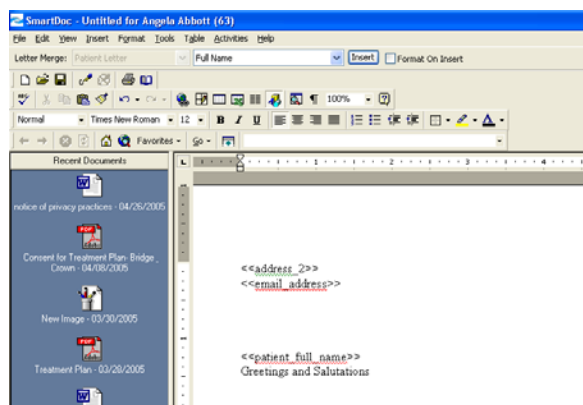
SmartDoc and HIPAA



Use the **Document Information** checkboxes to designate your HIPAA documents. Select from the following options: **Notice of Privacy Practice**, **Consent** and **Privacy Authorization**.

SmartDoc Word® Merge

Using Microsoft Word, create letters and templates using the **InTouch** merge field. Open a Word document in **SmartDoc** and select the **Letter Merge** field. Select the **Insert** button to add the merge field to the document.



Select the **Merge** button or select **File | Merge Data** to populate the merge fields.

Use this to create new letters or export the document to create a template for office use that can be imported back into **SmartDoc**.

JPEG Files in SmartDoc

SmartDoc offers additional functionality when viewing JPEG images. Use the following buttons to Pan, Zoom, Fit To Window and View Full Sized.



Print Screen

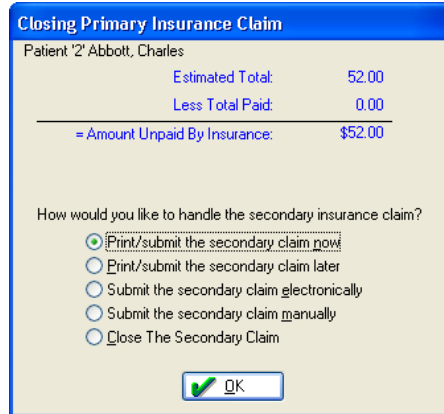
Capture images of your computer screen using the **ESInet**. In the System Tray, right-click on the **ESInet** icon. Select **Print Screen**.



A window appears showing that the screen capture is being sent to the default printer.

Insurance Claims

Print Secondary Claim Now



Closing Primary Insurance Claim
Patient: '2' Abbott, Charles

Estimated Total:	52.00
Less Total Paid:	0.00
<hr/>	
= Amount Unpaid By Insurance:	\$52.00

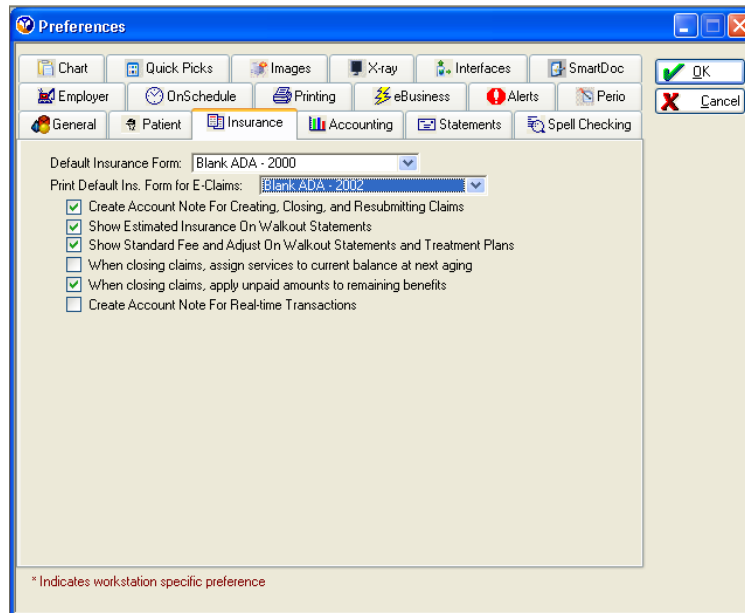
How would you like to handle the secondary insurance claim?

- Print/submit the secondary claim now
- Print/submit the secondary claim later
- Submit the secondary claim electronically
- Submit the secondary claim manually
- Close The Secondary Claim

Select the radio button **Print/submit the secondary claim now** to do just that. Select **OK** to complete the transaction.

Secondary Default Claim Form

***EagleSoft Tip**
This preference
pertains to new
employer
information.*



Preferences

Default Insurance Form: Blank ADA - 2000

Print Default Ins. Form for E-Claims: Blank ADA - 2002

- Create Account Note For Creating, Closing, and Resubmitting Claims
- Show Estimated Insurance On Walkout Statements
- Show Standard Fee and Adjust On Walkout Statements and Treatment Plans
- When closing claims, assign services to current balance at next aging
- When closing claims, apply unpaid amounts to remaining benefits
- Create Account Note For Real-time Transactions

* Indicates workstation specific preference

Under **Preferences** | **Insurance**, use the drop-down list to select a default insurance form to use when printing claims that you would normally submit electronically. Select from any of the available insurance forms.

To select the **Secondary Default Claim** form for existing employers, go to **Lists** | **Employer** and edit the desired **Employer**.

AutoNotes on Claims

EagleSoft Tip
Use the **AutoNotes** to store common narratives to include on claim forms.

Insurance Questions

Patient ID: 63 Angela Abbott
Resp. Party ID: 63 Angela Abbott

Print Now Print Later Submit Electronically Submit Manually

Insurance Form: Blank ADA - 2000

Questions:

Date of Prior Placement: 00/00/0000

Is Treatment Result of Occ. Illness or Injury: Yes
If Yes, Enter Brief Description and Dates: _____

Is Treatment Result of Auto Accident: Yes
If Yes, Enter Brief Description and Dates: _____

Is Treatment Result of Other Accident: Yes
If Yes, Enter Date: 00/00/0000
Description: _____

Remarks for Unusual Services:

When processing a **Walkout**, select the **AutoNote** button to attach an **AutoNote** to the claim in the **Remarks for Unusual Services** area. Use an existing **AutoNote** or create a new one for the occasion.

Statements

Preferences

Preferences

Chart Quick Picks Images X-ray Interfaces SmartDoc
Employer OnSchedule Printing eBusiness Alerts Period
General Patient Insurance Accounting **Statements** Spell Checking

Show Estimated Insurance on Statements
 Create Account Note for Statements
 Add Statement Message To Account Note
 Include Credit Card Payment Option (Enhanced Statement Formats Only)
 Include Offsetting Debit and Credit Adjustments on Statements

Return Address On Statements:
 Preferred Dentist Practice

Use Wizard for Individual Statements

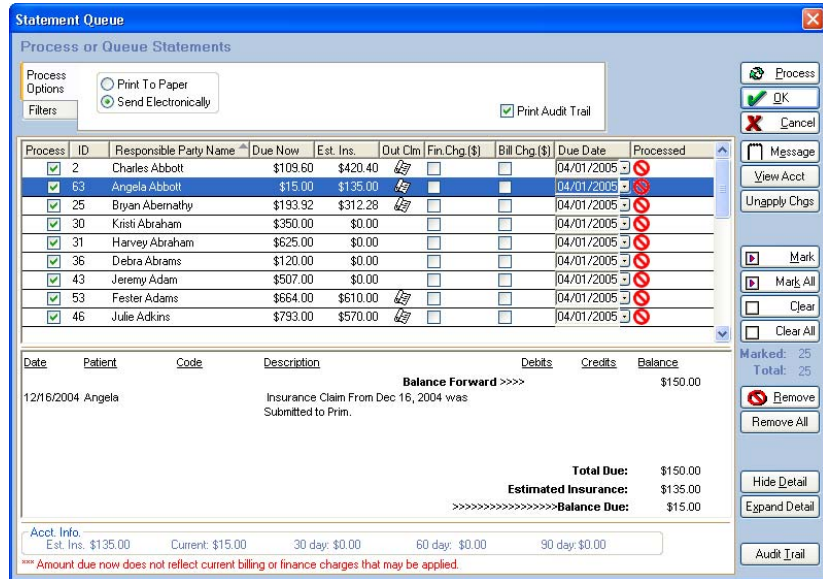
* Indicates workstation specific preference

Include Offsetting Debit and Credit Adjustments on Statement – Select this option to include any adjustments pertaining to automatically offsetting debit and credit amounts on the Account Ledger.

Use Wizard for Individual Statements – Select this option to use the Statement Wizard to generate a single statement from Account. Leaving this preference deselected will generate individual statements using the default settings.

Statement Queue

To assist in managing your monthly statements, **Patterson EagleSoft** has created the **Statement Queue**. Statements can be generated anytime and then processed from the Queue at your convenience. This allows you to view, filter and sort your statements prior to processing them.



After stepping through the **Statement Wizard** as usual, select the **Finish** button to launch the **Statement Queue**. See the example above. In the **Process Options** tab, select either **Print To Paper** or **Send Electronically**. Select the checkbox **Print Audit Trail** to print a list of all statements processed to keep for your records.

To sort the list by heading, select the name of the column heading. Use the column headings to sort your information including new columns for **Outstanding Claim** and **Due Date**.

Select the **OK** button to save your queue without processing.

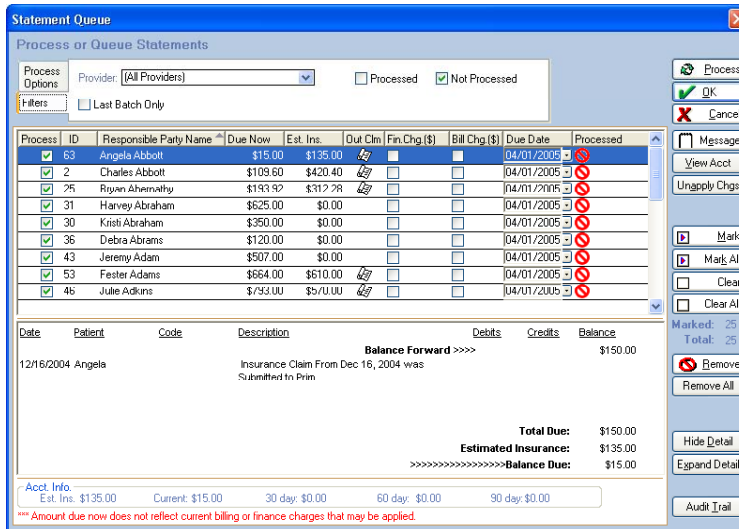
Use the **Unapply Chgs** button to remove previously applied finance charges from statements in the Queue.

Use the **Remove** button to remove a statement from the list. Select the **Remove All** button to clear the entire list.

Select the **Hide Detail** button to display the basic information about each statement in the queue. Select the **Expand Detail** button to display the full detail on each statement in the queue.

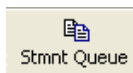
Select the **Audit Trail** button to print a report of everything currently in the Queue.

EagleSoft Tip
Use the **Statement Queue** to overwrite finance charges. No more compounding interest on reprinted statements.



At the top, select the **Filter** tab. From here, you can filter the **Statement Queue** by **Provider, Processed, Not Processed** and **Last Batch Only**.

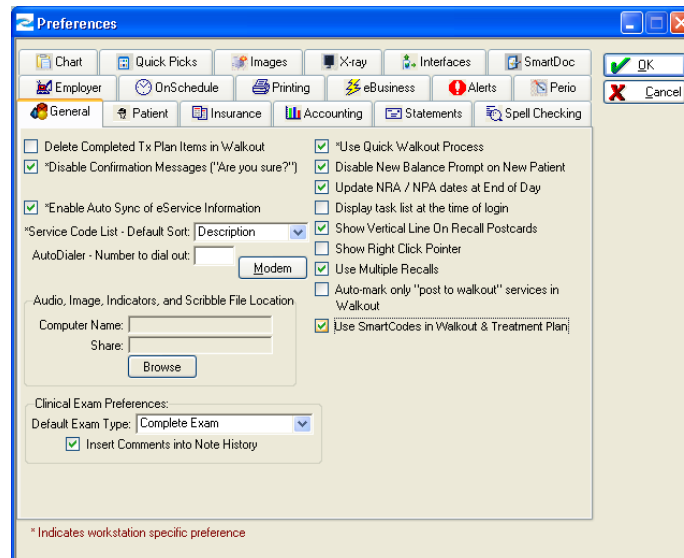
Add the Statement Queue icon to your Toolbar using the right-click menu.



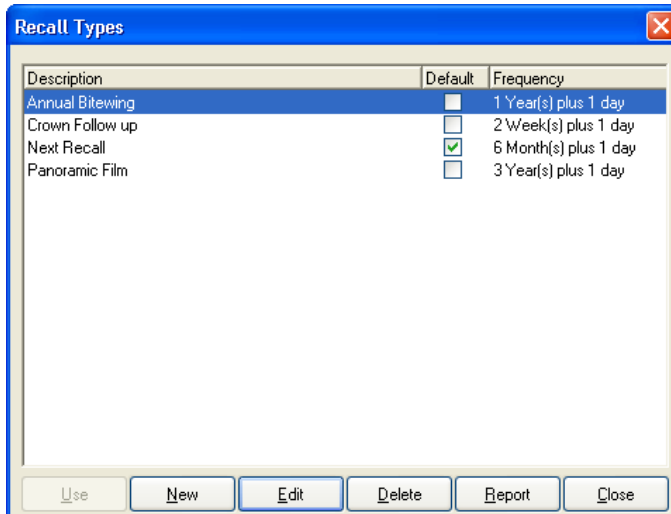
Recalls

Recall Tracking

Create customized recall types to better manage your patients' care.

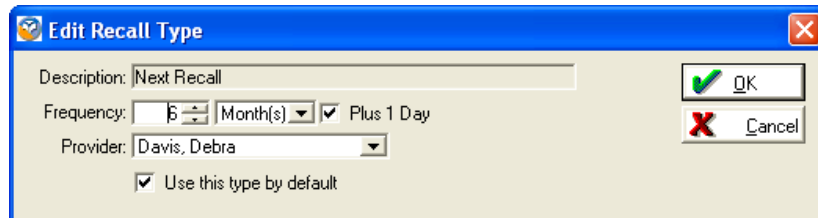


Under **Preferences | General**, select the checkbox **Use Multiple Recalls**. Select **OK** to save your changes.



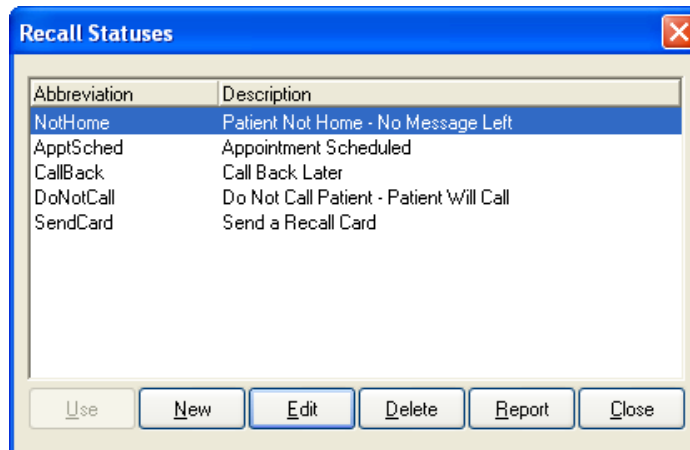
To create **Recall Types**, select **Lists | General Setup | Recall Types**. Select the **New** button to enter a new **Recall Type**. Select the **Edit** button to edit an existing **Recall Type**. Select the **Delete** button to delete the selected **Recall Type**. Select the **Report** button to preview the **Recall Types** report. Select the **Close** button to exit the window.

Creating New Recall Types



In the **Recall Types** window, select the **New** button to add a **Recall Type**. In the **New Recall Type** screen, enter the **Description**, set the **Frequency** and select the **Provider**. Select the checkbox **Plus 1 Day** to add one additional day onto your frequency amount. Select the checkbox **Use this type by default** to set the current **Recall Type** as the default recall type for all new patients. Select **OK** to save your new **Recall Type**. Select **Cancel** to exit the screen without saving.

Recall Status

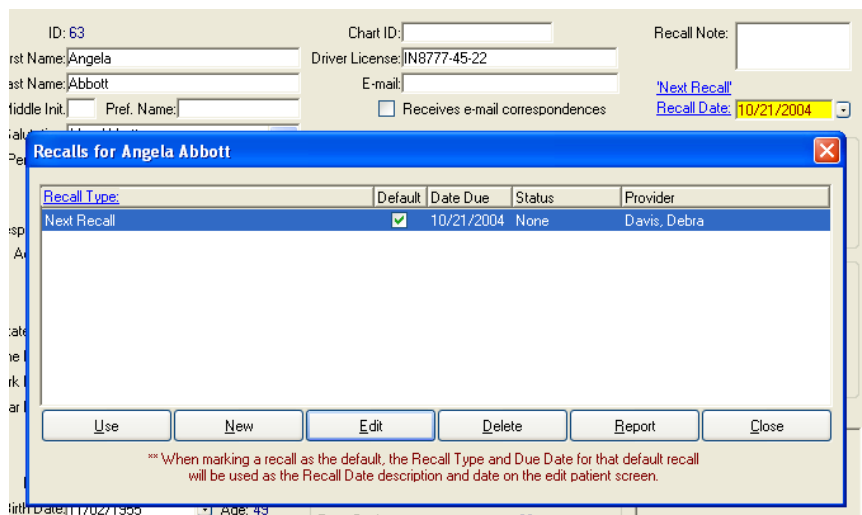


To create **Recall Statuses**, select **Lists | General Setup | Recall Statuses**. Select the **New** button to create a new **Recall Status**. Select the **Edit** button to edit the selected **Recall Status**. Select the **Delete** button to delete the selected **Recall Status**. Select the **Report** button to preview the **Recall Statuses** report. Select the **Close** button to exit the window.

Creating New Recall Statuses

To create new **Recall Statuses**, select the **New** button. In the **New Recall Status** window, enter the **Abbreviation** and **Description** of the status. Select **OK** to save. Select **Cancel** to exit without saving.

Assigning Recalls – Edit Person

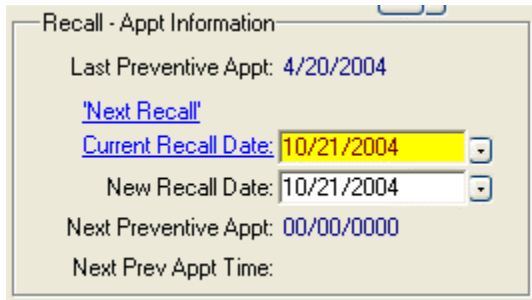


In **Edit Person**, select the hyperlink **Recall Date**. In the **Recall for <Patient Name>** screen, select the **New** button to add a **Recall Type** from the **Recall Type** list. Select the **Use** button to use the highlighted **Recall Type** as the patient's next recall.

Assigning Recalls – Walkout

In the **Walkout Processing** screen, select the hyperlink **Current Recall Date**. In the **Recall for <Patient Name>** screen, select the **New** button to add a **Recall Type**

from the **Recall Type** list. Select the **Use** button to use the highlighted **Recall Type** as the Patient's next recall.



Recall - Appt Information

Last Preventive Appt: 4/20/2004

[Next Recall](#)

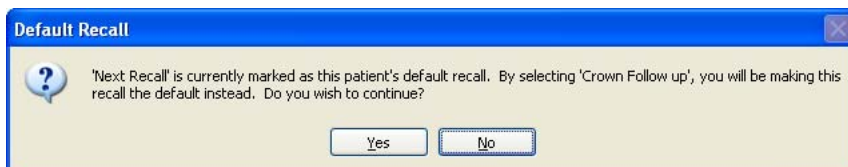
Current Recall Date: 10/21/2004

New Recall Date: 10/21/2004

Next Preventive Appt: 00/00/0000

Next Prev Appt Time:

Default Recall Type



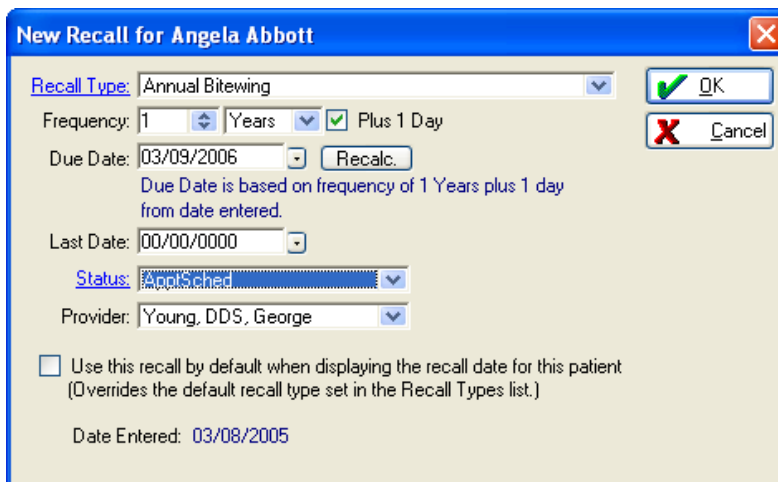
Default Recall

? 'Next Recall' is currently marked as this patient's default recall. By selecting 'Crown Follow up', you will be making this recall the default instead. Do you wish to continue?

Yes No

When using a **Recall Type** other than the Patient's default **Recall Type**, the following message appears: **<Default Recall Type's Name> is currently marked as this patient's default recall. By selecting <Selected Recall Type's Name>, you will be making this recall the default instead. Do you wish to continue?** Select **Yes** to continue. Select **No** to exit without using the newly selected **Recall Type**.

Recall Tracking



New Recall for Angela Abbott

Recall Type: Annual Bitewing

Frequency: 1 Years Plus 1 Day

Due Date: 03/09/2006 Recalc.

Last Date: 00/00/0000

Status: [dropdown]

Provider: Young, DDS, George

Use this recall by default when displaying the recall date for this patient (Overrides the default recall type set in the Recall Types list.)

Date Entered: 03/08/2005

OK Cancel

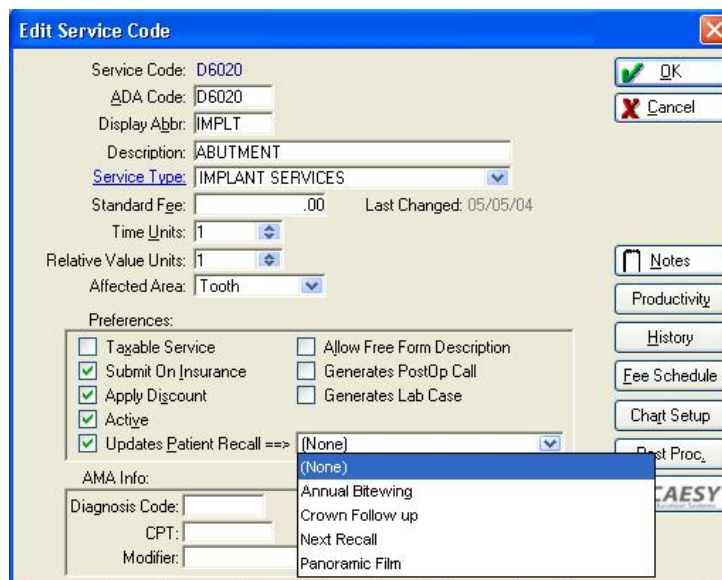
To effectively track the **Recall Type** assigned to a patient, select the **Recall Date** hyperlink in the **Edit Person** screen. To select the **Recall Type**, use the drop-down arrow or select the **Recall Type** hyperlink. Use the predetermined time or enter the **Frequency** amount for the selected recall. Use the **Due Date** determined by the **Frequency** amount or select the arrow to choose a new date. Select the **Recalc** button to recalculate the **Frequency** based on the date entered or the last date used. Select the **Last Date** amount or use the default date based on service code. Use the hyperlink or the drop-down list to select the **Status**. Use the predetermined **Provider** or select a new one using the drop-down list. Select the checkbox **Use this recall by default when displaying the recall date for this patient (Overrides the**

default recall type set in the Recall Types list.) to make the selected Recall Type the patient's primary Recall Type.

Recall Types and Service Codes

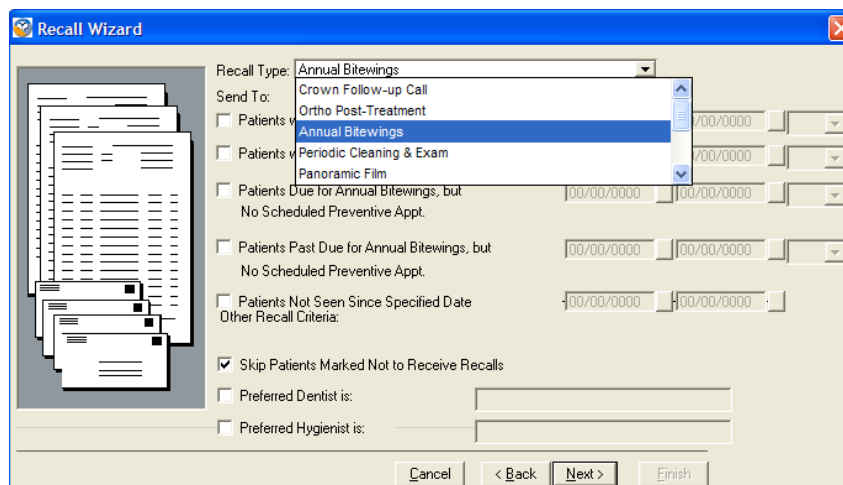
EagleSoft Tip

Assigning specific Recall Types to different service codes allows you to update multiple recalls during the walkout.



Selecting the checkbox **Updates Patient Recall** on a **Service Code** allows you to assign a **Recall Type**. Use the drop-down list to select the **Recall Type** that you wish to associate with this particular service code.

The Recall Wizard



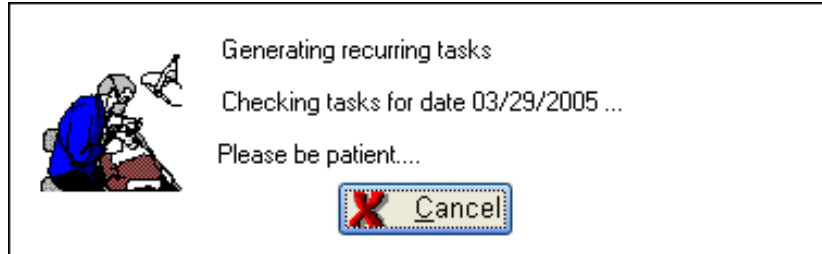
In addition to selecting the types of **Patients** to send **Recalls** to, select the **Recall Type**. Use the drop-down arrow in the **Recall Wizard** to select the **Recall Type** to be generated.

Hide Appointment Type

As a further expansion of our HIPAA security features, the **Appointment Type** no longer appears on **Recalls**. All appointment dates are listed under the non-specific heading **Scheduled Appointments**.

Task List

Cancel the **Task List** generation by selecting the **Cancel** button.



Digital Integrations

Gendex

Introducing the Gendex Digital Panoramic Unit integration with Patterson *EagleSoft*.

Sordex

Introducing the Sordex Optime digital integration with Patterson *EagleSoft*.

Schick

Introducing the Schick Panx digital integration with Patterson *EagleSoft*.

Access Password

Use the **Access Password** utility to locate a lost or forgotten password. When setting up the Security Administrator password, the following screen appears.

Master Password

Password for Security Administrator

Clear existing password?

New Password: [masked]

Confirm Password: [masked]

Enter questions & answers for accessing password:

Question 1: Social Security Number?
Answer 1: 333-33-33XX

Question 2: Coke or Pepsi?
Answer 2: Pepsi

Question 3: Paper or Plastic?
Answer 3: plastic

[View EagleSoft Messenger Log](#)

Enter and confirm the desired password. Enter the questions and answers that will be used to retrieve password information. Select **OK**.

Select the checkbox **Clear Existing Password** to delete the current password.

To set up your individual Provider passwords, log on as the **Security Administrator**. Select the appropriate person from the **Provider/Staff List**. Select **Edit**.

Provider Password

Provider/Staff Name: George Young, DDS

Clear existing password:

New Password: [masked]

Confirm Password: [masked]

Enter questions & answers for accessing password:

Question 1: favorite sports team?
Answer 1: Cardinals

Question 2: Mother's Maiden Name?
Answer 2: Werbenjagermanjensen

Question 3: Dog's Name?
Answer 3: Frodo

Practice Management Access Options:

	View	Add	Edit	Delete
Basic Information:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Providers:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Transactions:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Productivity Info:	<input checked="" type="checkbox"/>	N/A	N/A	N/A
Appointments:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mass Updates:	N/A	N/A	N/A	N/A
Medical History:	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A
Patients:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>
Tx Plans:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Plans:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Prescriptions:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lab Work:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Time Sheet Mgmt:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Notes:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Clinical Access Options:

	View	Add	Edit	Delete
Chart Items:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Perio Exams:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PSR Exams:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Images:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Watch Tooth Info:	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
eReferral Info:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clinical Exam:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A

Edit Completed Clinical Exams

Enter the **Question** and provide the **Answer**. You must include an entry for all three. Select **OK**.

Select the checkbox **Clear Existing Password** to delete the current password.

To establish your Time Sheet password, select the Time Clock Password button.

The screenshot shows a dialog box titled "Timesheet Password" with a close button (X) in the top right corner. The text "Provider/Staff Name: George Young, DDS" is displayed at the top left, with a green checkmark and "OK" button to its right. Below this is a checkbox labeled "Clear existing password?". There are two password input fields: "New Time Clock Password:" and "Confirm Time Clock Password:", both containing masked characters. A section titled "Enter questions & answers for accessing password:" contains three questions and answers: "Question 1: Father's Name?" with answer "Alfonse Elrich", "Question 2: Birth date?" with answer "January 1, 1965", and "Question 3: Wife's Maiden Name?" with answer "Hawkeye".

Enter and confirm the desired password. Enter the questions and answers that will be used to retrieve password information. Select **OK**.

Select the checkbox **Clear Existing Password** to delete the current password.

Any failed attempt to enter your password will result in the following prompt:

The screenshot shows a dialog box titled "Patterson EagleSoft" with a close button (X) in the top right corner. It features a question mark icon and the text "The Password you entered is not valid. Would you like to run the Access Passwords Utility?". At the bottom, there are two buttons: "Yes" and "No".

The following screen will appear

The screenshot shows a dialog box titled "Access Provider Password" with a close button (X) in the top right corner. The text "To retrieve the password for George Young, DDS" is at the top left, with a green checkmark and "OK" button to its right. Below this is a red "X" and "Cancel" button. The main text reads "Answer these 3 questions correctly then click OK to retrieve password:". There are three input fields for "favorite sports team?", "Mother's Maiden Name?", and "Dog's Name?". A section titled "Or contact Patterson EagleSoft Support" contains the text "Give the following identification number to Patterson EagleSoft Support:" followed by a text box containing "65", and "Enter the password given to you by Patterson EagleSoft Support here:" followed by another text box.

Enter the answers to the questions listed on the Access<<area of software>> Password screen. Contact the Support team if the answers cannot be obtained.

To otherwise retrieve your **Passwords**, select **Utilities | Access Passwords**.

Access Password

Master Password
 Provider Password
 Timesheet Password

Answer these 3 questions correctly then click OK to retrieve password:

Social Security Number?
[]

Coke or Pepsi?
[]

Paper or Plastic?
[]

Or contact Patterson EagleSoft Support

Give the following identification number to Patterson EagleSoft Support:
33

Enter the password given to you by Patterson EagleSoft Support here:
[]

OK Cancel

Select the appropriate radio button for **Master Password**, **Provider Password** or **Timesheet Password**. Enter the answer for each question. After each question is successfully answered, select **OK**. The password will appear.

Contact the Support team if the answers cannot be obtained.

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