Continuing Care – Unit 6

The Continuing Care unit contains the following chapters:

- Rx Writer
- Lab Case Tracking
- Post Procedure Notes
- eReferrals
- Recalls
Rx Writer

Introduction to the Rx Writer

*EagleSoft’s Rx Writer* is a fully automated prescription writer that enables you to create, process and print prescriptions for your patients. Rx Writer gives you the ability to set up local pharmacies, prescriptions, pre-medication alerts and much more. Rx Writer and OnSchedule enable you to schedule a patient and prescribe pre-meds all from the same window.

This chapter contains information on the following:

- Setting up the Rx Writer
- Setting up laboratories and drugs
- Using the Rx Writer
- Using OnSchedule and the Rx Writer

Setting Up the Rx Writer

Before setting up the patient preferences, it is a good idea to set up the Rx drugs, templates and pharmacies. This enables you to create prescriptions more quickly and with greater efficiency. Setting up prescription templates, drugs and pharmacies means you can save time when creating a prescription for patients who may be waiting.
Rx Drugs

1. To set up the drugs for your system, go to Lists | Practice Management Lists | Rx Writer | Rx Drugs.

   The following Rx Drugs list box appears.

   ![Rx Drugs list box]

2. From the Rx Drugs window, you can view the drug name, dispense and refills. Click New to add a new drug. Click Edit to modify an existing drug. Click Delete to delete an Rx drug. To print a report of Rx Drugs, click Report.

   The New or Edit Rx Drug window appears if you clicked New or Edit.

   ![New Rx Drug window]

3. Enter the drug name in the Drug box – Darvacet, Amoxicillin, Tylenol #3 and so on. Select the # of Refills radio button and enter an amount to allow only a certain number of refills. Select the As Needed radio button if the drug is to be refilled only on an as-needed basis.

4. Click OK when finished editing or creating an Rx drug.

Pharmacies

Creating pharmacies can speed up the prescription process. The pharmacy information includes the address, phone number, contact name and any comments. If a patient has a preferred pharmacy, the patient’s pharmacy’s name and phone number appear in the Rx Writer, however you may choose a different pharmacy other than the preferred. You can call in the prescription or give instructions to the pharmacist as well.

1. Go to Lists | Practice Management Lists, choose Rx Writer and select Pharmacies.

   The Pharmacy List window appears.
2. From the Pharmacy List window, you can create, edit or delete pharmacies. To edit, select a pharmacy and click Edit. To delete, select a pharmacy and click Delete.

To create a pharmacy, click New.

The New or Edit Pharmacy window appears.

3. Enter name, address, the contact name, phone/fax number and comments relevant to the pharmacy.

4. Click OK to save and exit.

Setting Up a Preferred Pharmacy for a Patient

After creating pharmacies, you may want to set up preferred pharmacies for patients.

1. To set a patient up with a pharmacy, go to Lists | Practice Management Lists | Person and edit a person.

2. Click on Preferences in the Edit Person window.

3. Select a pharmacy from the Pharmacy dropdown list box.

4. Click OK when finished setting up preferred pharmacies. This patient’s preferred pharmacy is saved. When you enter a prescription for the patient, the pharmacy name and phone number appear.
Templates

Templates enable you to create prescriptions for your patients in a timely manner.

When templates are set up, creating a prescription is as easy as selecting the template from the Template dropdown list box and clicking OK.

Follow the instructions below for creating a prescription template:

1. From the Lists | Practice Management Lists | Rx Writer menu, select Template.

2. From the Prescription Templates window, you can view a list of current templates. The templates are displayed as Description, Drug Name, Refill and Dispensed.

To edit a template, select a template and click Edit.

To delete a template, select a template and click Delete.

Click New to create a template.

The New or Edit Rx Template window appears.

3. Enter the following template information as needed:
   - **Description** – Enter a description for the Rx template
   - **Drug** – Select an Rx drug from the dropdown list box. Once a drug is selected, the drug information is pulled in
   - **Dispense/Refills** – Enter or select the amount of refills and refill information
• **Rx Instructions** – Enter information pertaining to this prescription. This information is printed on the form to be given to the pharmacy.

• **Patient Instructions** – Enter instructions for the patient. This information appears below the perforated line on the prescription label. This information alerts the patient to any possible side effects, times to take the medicine and so on.

• **Provider** – Select a provider from the dropdown list box. This displays the provider writing the prescription for the patient.

• **Add Alert** – Select this checkbox to generate an alert for this prescription as long as it’s active.

4. Click **OK** to save and exit.

---

### Setting Up Rx Writer Preferences

Once you are finished setting up the pharmacies, drugs and templates, you can then set up the preferences for the Rx Writer. Although the preferences are not required, they are helpful when creating and processing prescriptions for your patients.

#### Person Preferences

Setting up person preferences for the Rx Writer saves time when creating prescriptions for each patient. These preferences also remind you of phone numbers and pre-meds.

To set up the Rx preferences, go to the **Patient Preferences** window.

1. To access the **Patient Preferences** window, go to the **Lists** menu and select **Person**.
2. From the **Person List**, select a person and click **Edit**.
3. From the **Edit Person** window, click the **Preferences** window. In the **Patient Preferences** window, you are able to add the preferences for the current patient in the **Appointment Preferences** section.

#### Appointment Preferences – Using Rx Writer with OnSchedule

If you select the **Pre-med necessary** checkbox, a pre-med message box *(see the following image)* appears when this patient is scheduled for an appointment.

![Pre-medication Required](image)

This message box gives you three options:

• **Prescribe Now** – Click this button to prescribe or create a prescription for the selected patient at the time you are scheduling the appointment.
• **Assign A Task** – Click this button if you want to assign a task as a reminder to prescribe pre-meds for the selected patient.

• **Don’t Prescribe** – Click this button if you do not want to prescribe an Rx for the selected patient at this time.

If the patient is set up for pre-medication in the patient’s preferences, a pre-medication indicator appears on the appointment block.

**Financial Preferences**

In the **Edit Person** window, select a pharmacy from the **Pharmacy** dropdown list box. When you create a prescription for a patient, that patient’s pharmacy phone number and address appear by default.

**Printing Preferences**

**Perforated Rx Forms**

Printing prescriptions through **EagleSoft** is an efficient way of providing prescriptions for a patient before he/she leaves the office. **EagleSoft** enables printing prescriptions on perforated Rx forms as well as plain paper.

Follow the instructions below for setting up the Rx forms:

1. To print prescription forms with a perforated edge, go to **File | Preferences | Practice Management Preferences** and select the **Printing** tab.

2. Choose the **Use Perforated Rx Forms for Prescriptions** checkbox.

3. Click **OK** to save this preference.

**Rx Form Type**

If your state has regulations on the location of questions or specific text on your prescriptions, you may need to select one of the different prescription forms in the Rx Form Type. From the **Rx Form Type** dropdown list box, you can select various types of forms.

**Tamper-resistant paper for Medicaid**

To accommodate Medicaid requirements for using tamper-resistant prescription paper, preferences have been added to change the print orientation of the Rx Writer.

In the **Prescription Preferences**, select the checkbox **Print in 5 ½”w x 4 ¼” h layout** to default your print orientation to required Medicaid size.
To set the size orientation on a case-by-case basis, use the preferences in the Prescription window. In the New/Edit Prescription window, select the checkbox Print in 5 ½”w x 4 ¼” h layout to apply the orientation change to the current Prescription only.

Accessing the Rx Writer

The Rx Writer is accessible from several places in EagleSoft.

From the Integrated Mode window, go to the Activities | Practice Management Activities menu and choose Rx Writer.

-or-

From the Integrated Mode window, click on the Prescription Writer icon.

-or-

If available, click Rx Writer on the toolbar in any mode.

-or-

From the OnSchedule window, right-click on an appointment, choose Appointment Services and select Prescription Writer.

Creating Prescriptions

Now that the template, pharmacy and drug information are set up, you can create a prescription.

Prescriptions Window

1. Go to Activities | Practice Management Activities and select Rx Writer. The Prescriptions window lists all current prescriptions with sorting options.

2. From the Prescriptions window, there are various ways of managing and viewing prescriptions. To sort the prescriptions differently, click one of the column headings.
The following options are available:

**Find** – Depending on the sort method, enter the Rx ID number (far left column), press the Tab key then press the Enter key.

**Show expired prescriptions** – Select this checkbox to view expired prescriptions from the Prescriptions list.

**Refill** – Select the prescription to be refilled and click the Refill button. The Prescriptions window appears. Enter the refill amount in the # of Refills box and click OK. The original prescription remains and a new prescription appears with the date of the refill.

**New** – Click New to create a prescription. To continue creating a prescription, skip to #3.

**Edit** – Select a prescription and click Edit to modify a prescription.

**Delete** – Select a prescription and click Delete. A deleted prescription is marked through.

**Report** – Click this button to preview/print a report of prescriptions.

For more information, see the section later on printing prescription lists.

**Close** – Click Close to exit the Prescriptions window.

3. Click New to create a new prescription.

The New Prescription window appears.

4. If you are creating a new prescription, select a patient. If the patient has a preferred pharmacy, the name and phone number appear. If not, select the dropdown list to choose any pharmacy in your database.
5. Select the checkboxes **Prompt for Rx paper change before printing** or **Print in 5 ½” w. x 4 ¼” h. layout** when using specific pre-printed or tamper-resistant prescription paper.

6. From the **Rx Template** dropdown list box, select a template (if desired). If the template has not been set up in the **Template** window, click the underlined word **Rx Template**. From this window, you can create, edit and view templates.

7. If the template does not include a drug, select a drug from the **Drug** dropdown list box if applicable. Enter the dispense amount and refill information if needed.

8. If applicable, enter any **Rx Instructions** for the pharmacy.

9. Use the default pharmacy or choose any pharmacy in your database.

10. If needed, enter instructions for the patient in the **Patient Instructions** box.

11. Select a provider from the **Provider** dropdown list box. This is the provider who assigned the prescription.

12. Enter or select a **Valid Until** date. This date indicates how long the prescription appears in the **Prescriptions** window as an active prescription.

13. Select the **Add Alert** checkbox if you want this prescription to appear along with the alerts.

14. Before saving the prescription and closing, there are three other options:
   - Click **Print** to print the prescription form
   - Click **Setup** to view the printer setup
   - Click **Rx History** to view this patient’s Rx history

15. Click **OK** to save and exit. An operatory and/or account note is generated when a prescription is created.

---

**Printing Prescriptions and Reports**

**Printing Prescriptions**

The final and most important step in processing prescriptions is printing the prescription for the patient and the pharmacy. Patterson Office Supplies has provided a form that is used when printing out the prescription. This form is split into three sections: the prescription form for the pharmacy, a duplicate of the prescription for the patient’s file, and, in the bottom portion, a patient prescription report that includes information and/or instructions per the medication.

1. To print the prescription form, select the prescription from the **Prescriptions** window.
2. Click **Edit**.
3. To select a different printer for the Rx Writer, click **Setup**.
4. To print the prescription, click **Print**. The form is printed automatically.
5. When the prescription has been printed, the following message appears:
   Your prescription has been printed.
6. Click OK to save and close the Prescriptions window.

**Printing Prescription Reports**

The prescription report prints the Rx ID patient name, drug name, Rx date, expiration date, refills, dispense, Rx instructions, patient instructions, provider and allowable generic option.

The prescription report is available from the following areas: Edit Person window, Prescriptions List window, the Tx/Rx/Lab tab in the Reports menu and as an EOD report.

Once you have selected to print a report, you have different options for the prescription report.

1. To print a Prescription History report for an individual, choose the Individual Patient radio button. You then have the option of selecting a patient.

2. To print a report for all patients, select the All patients radio button. If needed, select a certain provider or choose All Providers for the reports.

3. If you want to include expired prescriptions, select the Show expired prescriptions checkbox. To include “striked” prescriptions (prescriptions that have been modified), select the Show striked prescriptions checkbox.

4. Click Report Preview to view how the report looks.
Lab Case Tracking

Introduction to Lab Case Tracking

The Lab Case Tracking feature is an easy way to manage lab work being done for your patients. This feature monitors all lab work, the labs they were sent to, the date sent, the date expected for return and more. Service codes can be set up to generate lab cases when walked out. If you walk out a patient who needs lab work, you can schedule the patient and create a lab case all from OnSchedule in a few quick steps.

Lab Case Tracking gives you more ways to manage time-consuming office work while meeting your patients’ needs.

The following information is in this chapter:

- Setting up lab case tracking preferences
- Creating laboratories
- Creating lab cases
- Using lab cases with walkouts
- Using lab cases with appointments

Lab Case Tracking – Setup

Before using lab case tracking, you need to create laboratories and lab case types. The laboratories store contact information for you to use when creating lab cases. The lab case type can also be used when creating lab cases. Lab case types help monitor types of lab cases being sent, the amount and the frequency.

Laboratories

1. From Lists | Practice Management Lists | Lab Tracking, click on Laboratories.

   The Laboratory List window appears.
2. Click **New** or **Edit** to create or edit a laboratory.
   
   To edit a laboratory, select the laboratory and click **Edit**.

   To delete a laboratory, select the laboratory and click **Delete**.

   To print a report of laboratories, click **Report**.

   To exit the **Laboratory** window, click **Close**.

3. Enter address and contact information for the laboratory. Click **OK** when finished. Continue to add as many laboratories as you need for your practice.

---

**Creating Lab Case Types**

Creating lab case type descriptions for lab cases gives you the chance to view, edit and print your lab cases for future reference. If, for example, you want to track the amount of crowns sent off in the past month, print a detailed report of crowns according to the lab case types.

To use the lab cases, you first need to set up the lab case types.

1. From **Lists** | **Practice Management Lists** | **Lab Tracking**, click on **Lab Case Types**.

2. Click **New** to create a new lab case type.

   *The following window appears.*
3. Enter a description for the lab case type.
4. Click **OK** when finished. Continue to add as many lab case types as needed.

# Laboratory Cases

To create a laboratory case, you need to access the **Laboratory Cases** window.

1. From the **Activities** | **Practice Management Activities** menu, click on **Lab Tracking**.

**Laboratory Cases Window**

*The Laboratory Cases window appears.*

Select the column heading Patient Name to sort the list by Patient Name.

By default, this window lists all current and returned lab cases. Lab Cases are color coded for quick reference. The Lab Case colors are as follows:

- **Red** – Lab case is overdue or past the due date entered in the Laboratory Cases window.
- **Green** – Lab case is marked as returned.
- **Blue** – Lab case is marked as closed.
- **Black** – Lab case is pending return or lacking return date information.

The following options are available from the **Laboratory Cases** window:

- **Find** – Type in the due date of the lab case and hit **Enter**. The lab case is selected.
- **Include Closed Cases** – Select this checkbox to view closed lab cases.
- **Include Returned Cases** – Select this checkbox to view returned lab cases.
- **New** – Click **New** to create a lab case.
- **Edit** – Click **Edit** to edit a lab case.
- **Delete** – Click **Delete** to delete a lab case.
- **Report** – Click **Report** to print a report of lab cases.
- **Close** – Click **Close** to close the **Laboratory Case** window.
Creating or Editing a Lab Case

2. Click **New** to create a lab case. Click **Edit** to modify an existing lab case.

   *A new Lab Case Information window appears.*

3. Select a patient and the provider who entered the lab case.

4. Select a laboratory from the laboratory dropdown list box. If you haven’t created a lab yet, click the underlined word **Laboratory** to access the **Laboratory List** window.

   If there is a contact at the laboratory (a person at the lab you talk to most often), enter that name in the **Contact** field.

5. Select a lab case type from the **Lab Case Type** dropdown list box. Click the underlined words **Lab Case Type** if you need to create or edit a lab case type.

6. Enter a date in the **Date Opened** box. This is the date the lab case was created.

7. When the lab case is returned, enter the date in the **Date Returned** box.

8. Enter the date the lab case is to be returned in the **Date Due** box.

9. When the lab case is returned, enter the lab’s invoice number in the **Invoice Number** box.

10. If applicable, enter the shade name/number attached to the lab case.

11. When the lab case is returned, enter the fee charged by the lab for the lab work in the **Fee** box.

12. Enter a **Description** for the lab case. This box is used to enter detailed information about the lab work. The **Description** field has been expanded to allow for up to 32,000 characters. **Auto Notes** can now be used to fill in the **Description** field.

13. Select the **Add to Task List** checkbox, if you want to assign this lab case as a task. This lab case appears in the Task List with the subject
name Lab Case, the category, the date it is due on, the provider the case is assigned to and the patient.

14. Select the Close This Lab Case checkbox to close the lab case. The lab case may be reviewed by the user at any time.
   
   Note: This option does not delete the lab case.

15. Select the teeth appropriate to this lab case.

16. Click OK when you have finished creating the lab. The Laboratory Cases window appears with the new lab you just created.

17. To print/preview the lab case, click Print.

---

### Add Images to Lab Cases

An Images button has been added to the Lab Case Information screen located directly under the Cancel button.

Selecting the Images button on an existing Lab Case will open the Lab Case Image Selector.

When selecting the Image button on a new Lab Case, the following message will appear.

![Lab Case Images dialog box](image)

Select No to return to the New Lab Case Information screen.

Select Yes to save the lab case and open the Lab Case Image Selector.

### Lab Case Image Selector

The Lab Case Image Selector works similarly to the Treatment Plan Image Selector. All Images for the selected patient will display on the left side of the screen.
1. Select an image to display at the right.
2. Select the checkbox associated with the image to add the image to the Selected Images section at the bottom of the screen.
3. Enter a comment in the Comments section if desired.
4. Select Cancel to return to the Lab Case Information screen without saving any changes made.
5. Select OK to attach the image and return to the Lab Case Information screen.

---

**Lab Case Tracking – Printing**

There are two different print options for lab case tracking: printing lab case reports and printing lab cases. Both of these options assist in managing lab case tracking.

**Lab Case Reports**

1. To print a lab case report from the Lab Case Tracking window, click Report.
2. Click Print to print the report.
3. Click Cancel to exit from the Report Preview window.

**Lab Cases**

1. To print a specific lab case, select a lab case from the Lab Case Tracking window.
2. Click Edit.
3. Click Print to preview/print a lab case.
4. Click Print to print the Lab Case Detail.

---

**Using Lab Cases with Walkouts**

When processing walkouts with services set to generate lab cases, you can assign lab cases when the walkout is finished. There are two places you can view, edit or create lab cases when processing walkouts.

**When Processing the Walkout**

1. After the services are entered, click Process.

   *The second Walkout Processing window is displayed.*
2. Click **Lab Cases** to view or edit lab cases for the patient.

   The **Laboratory Cases** window is displayed showing any lab cases for the current patient.

3. Select a lab case and click **Edit** to edit a lab case. If creating a new lab case, click **New**. To print a report of this patient’s lab cases, click **Report**. Click **Close** to return to the **Walkout Processing** window.

### When Finished Processing the Walkout

If any service items in the walkout have been set to generate a lab case, a **Lab Case** window appears.

1. To enable a service to generate a lab case, choose a service code.
2. From the **Edit Service Code** window, click the **Generates Lab Case** checkbox.
3. When processing a walkout using a service set to generate a lab case, a **Lab Case** window appears. Enter the lab case information.
4. When finished entering the lab case information, click **OK** to save and close the window.

### Using Lab Cases with Appointments

You can add laboratory cases to appointments in OnSchedule.

1. When finished scheduling or editing an appointment (appointment must first be saved), click **Lab Case**.

   The following **Lab Cases** window appears.
2. Select the checkbox for the lab case you want to add to this appointment and then click **Apply** to add the lab case to that appointment. You can also create, edit, or delete any of the lab cases from this window.

3. When the lab case has been attached to the appointment, a lab case icon appears. This icon resembles a beaker of pink liquid, and it appears in the top-left corner of the appointment block.

4. The color of the lab case icon is based on the status of the lab case. If the beaker liquid appears red and full, the lab case has been returned or closed. If the lab case is outstanding, the beaker liquid appears pink and half-full.
Post Procedure Notes

Introduction To Post Procedure Notes

Post Procedure Notes is a feature that generates system notes based on services. For example, if you perform a single tooth extraction (07110) and a post procedure note is attached to the service that describes the procedure, this note is automatically generated and appears in the Post Procedure Notes window. From this window, you can view, edit, print and verify the note.

Post Procedure Notes are based in two areas: Service Codes and Notes.

Turning Notes into Post Procedure Notes

Only AutoNotes are available for Post Procedure Notes. To make a note into a Post Procedure Note, you must first save the note as an AutoNote.

1. From the Notes History window, click Text Note in the bottom left of the window.
2. Enter a text note and click Save As.
3. Enter a description for the AutoNote.
4. Click OK to save the AutoNote.

This note is now available from the Post Procedure Notes section of the Edit Service Code window.

Linking Post Procedure Notes to Service Codes

When service codes are linked with a Post Procedure Note and processed through a walkout, they generate the unconfirmed Post Procedure Note listing for your providers. Review this list at your convenience to confirm the note or add any additional comments to it.

1. From the Edit Service Code window, click Post Proc. The Post Procedure Notes Setup window appears.
2. To add a Post Procedure Note that is added to the Unconfirmed list each time a walkout linked to a Post Procedure Note is processed, click Add. A new line is added under the Description field.
3. Click the down arrow on the AutoNote dropdown list box.

4. From the AutoNote list box, click on the AutoNote of your choice, or press the F2 key, and click New to create a new AutoNote.

Managing Post Procedure Notes

To verify any outstanding unverified note go to the Activities menu, choose Clinical Activities, and select Post Procedure Notes. The Post Procedure Notes window is displayed (see the following image). All unverified notes are displayed.

- Filter – Click Filter to filter the listing of unconfirmed notes
- Delete – Click Delete to delete the highlighted note(s)
- Edit – Click Edit to edit the highlighted note, as necessary
- Print – Click Print to print a report of all unconfirmed notes

Verified/Unverified Icons

Unverified Notes are indicated by a crossed-out circle around a check mark.

Verified Notes are indicated by the Notes icon.

Verifying a Note

Click the check mark on the note.

-or-

From the Edit Note window, click the Verify checkbox and click OK.

Click OK to save your changes to the Post Procedure Notes window.

All remaining unverified notes remain in this listing until verified.

Note: Unverified notes can also be verified from the Notes tab of Clinical Exam for the selected patient.
eReferrals

Introduction to eReferrals

Staying in touch and sharing information with other practices and offices is important for your business. Referrals improve not only the effectiveness of these relationships but also improve your doctor/patient relationships. This translates into returning patients and profits. EagleSoft's eReferral Wizard enables you to increase your relationships and profits with just a few mouse clicks.

A doctor can now send a patient’s historical information to specialists by printing the information and mailing it or by sending it over the Internet. The eReferral Wizard walks you through selecting images, exams, patient information, treatment plans and so on. If you send a referral electronically, all of this information is uploaded to the EagleSoft server as a Web page. The receiving specialist receives an e-mail with a link to a place on the EagleSoft server where the patient’s information and images can be accessed and viewed.

Along with treatment plans, treatment plan images, radiography and video capture exams; the following items are available to attach to the eReferral:

- Missing teeth
- Patient photo
- Patient medical alerts
- Patient conditions
- Patient demographic information
- Patient completed services
- Current prescription information
- Watch tooth information

The following information is included in this chapter:

- Setting up referral recipients
- eReferral Wizard
- eReferral Manager
Setting Up Referral Recipients

Referral Recipients are specialists your office sends patients to on a regular basis. If you notice a patient may need perio treatment, you will want to send the patient and his/her relevant information to a periodontist. This feature enables you to manage, create and edit referral recipients. You can also send letters and print productivity reports from the same window.

1. Go to Lists and select Referral Recipients.

   -or-

Go to Lists | Referrals and choose Recipients. 

The Referral Recipients List window is displayed.

2. Click New to create a new referral recipient. To edit an existing referral recipient, select the referral recipient and click Edit. To delete a referral recipient, select the referral recipient and click Delete. To print a report of referral recipients, click Report.

When you have clicked the New or Edit button, the New or Edit Referral Recipient window appears.
3. Enter the practice name, doctor’s name, salutation, address information, phone/fax numbers and e-mail address. *Note: An e-mail address must be entered here in order to send referrals via e-mail.

**Entering Recipient Information**

The following information also needs to be entered:

- **email** – If you plan on submitting referrals electronically or if you just plan on sending e-mails, enter the e-mail address of the specialist.
- **Web** – If the specialist has a Web page, enter the Web page address in the Web box.
- **Birth Date** – If applicable, enter the recipient’s birth date.
- **Status** – Deselect the Active checkbox to deactivate this recipient.
- **Specialty** – Select a specialty from the Specialty dropdown list box.
- **Type** – Select the type of referral. Select the Recipient radio button to designate a referral recipient.
- **Notes** – Enter any notes related to this specialist.

4. When finished adding the referral recipient, click **OK**. To exit the Referral Recipient window without saving the information click **Cancel**.

If you want to print and send a letter to a referral recipient, click **Letter**.

If you want to view or print the referral recipient’s productivity, click **Productivity**.

---

**Using the eReferral Wizard**

After setting up a referral recipient or recipients, you may proceed with submitting referrals. If you are submitting eReferrals electronically, you need to be at a computer with a modem and e-mail access.

1. To access the eReferral Wizard, go to the Activities menu and select **eReferral Wizard**.

2. If you haven’t already, select a patient and select **Use**.

The following Patient Information window appears.
3. From the Patient Information window, select additional information you would like to include with the eReferral:

- **Missing Teeth** – Displays any missing teeth
- **Patient Photo** – Displays patient photo
- **Patient Medical Alerts** – Displays any active medical alerts for the patient
- **Patient Conditions** – Displays any existing conditions for the patient
- **Patient Demographic Information** – Displays names, addresses, phone numbers, and so on
- **Patient Completed Services** – Displays completed services for the patient
- **Current Prescription Information** – Displays prescription information for this patient, such as current prescriptions, pre-med information
- **Watch Tooth Information** – Displays watch tooth information

4. After selecting additional information to include on the eReferral, select a date the patient is expected to return from the drop down box.

5. Next, select the specialist to whom you wish to send the eReferral.

6. Choose the method you wish to use when sending your eReferral.
   - **Selected Specialist as a Letter** – This option enables you to print the eReferral and send it as a letter
   - **Selected Specialist Electronically** – This option enables you to submit the eReferral electronically. You need a modem or high speed Internet on the machine where you are submitting eReferrals.
   - **My printer as a report** – Select this option to print the eReferral as a report
   - **My database for later use** – Select this option to store the information in the eReferral Manager

7. After selecting the Patient Information, select Treatment Plan from the side bar.
8. From this window, select the treatment plan you want to include in the eReferral. The services appear in the Services box. The images appear in the Treatment Plan Images box and any treatment plan notes are in the Plan Notes area. Right-click on an image to use advanced imaging functions. Select Template Exam from the side bar.

The Template Exam Information window appears.

9. If applicable, select a Template exam from the Template Exam To Include a dropdown list box. Note: A Template Exam is any exam that was acquired within a chosen template. Any images from the selected exam appear below the dropdown list box. Right-click on an image to access advanced imaging functions.

Select Thumbnail Exam from the side bar.

10. If applicable, select a Thumbnail exam from the Thumbnail Exam To Include dropdown list box. Note: A Thumbnail Exam is any image series that was acquired without selecting a template prior to acquisition. Any images from the selected exam appear below the dropdown list box. As with the other image windows, you can also right-click and access advanced imaging functions.
The Thumbnail Exam Information window appears.

11. Select **Create eReferral** to continue.

12. Select **Yes** to continue. If you are sending the eReferral electronically, an upload window appears.

13. Click **Start** to upload the information. Click **Cancel** at any time to stop the upload process.

---

**Using the eReferral Manager**

The eReferral Manager stores all eReferrals sent out to specialists. If you need to check the date a referral was sent or is to be returned, this window stores all the pertinent information. If you have an e-mail program, you can also send e-mails to specialists from this window with just a few mouse clicks.

To access the eReferral Manager, go to **Activities**| **Clinical Activities** and select **eReferral Manager**.
The eReferral Manager window appears.

Following is a list of the functions available from the eReferral Manager:

- **Print** – This enables you to print the referral. Just select the specialist’s name and click Print
- **Print Letter** – Click this button to print the letter sent to the specialist, if a letter was sent instead of an electronic submission
- **E-mail Specialist** – This function allows you to e-mail the specific specialist by using your e-mail program
- **View Online** – This opens your Web browser to view the Web page sent to the selected specialist
- **Close** eReferral – Click this button to close the selected eReferral
- **View Comments** – Click this button to view any comments added to this eReferral
- **Delete** – Click this button to delete this eReferral
- **Status Legend** – The status legend defines the colors used in the eReferral Manager
  - **Open** – The eReferral appears in black
  - **Saved** – The eReferral appears in green
  - **Closed** – The eReferral appears in red
Recalls

Introduction to Recalls

Recalls are commonly used to remind patients of their dental checkups or upcoming appointments. If used properly, they can prevent patients from missing their next appointment and, in the process, fill all of your chairs.

The Recall Wizard not only allows you to keep track of patient recalls and appointments, it also walks you, step by step, through creating accurate reports, postcards and letters.

The Recall Wizard gives you several filtering options that allow you to customize your report or postcards for your office.

Some of the major features are listed below:

- Recalls filtered by Preferred Dentist/Hygienist
- Recalls selected according to different patient criteria
- The “and/or” option has been added to increase customization
- Printing and exporting options
- Message options
Using Recall Wizard

Accessing Recall Wizard

From Activities menu, choose Recall Wizard.

-or-

From the Integrated Mode window, click on the Recall Wizard icon.

-or-

From the Practice Management Front Office window, click on the Recall Wizard icon.

Previous Recalls and Printing

The first window of the Recall Wizard summarizes the previously processed recalls.

1. Click Next to continue or click View Last Batch Detail to see a detailed listing of all Recalls (see the following image) processed the previous time. If you do not want to view the last batch, go to step 3.
2. Click OK to continue.

![Recall Wizard window]

3. Select No if the last batch did not print completely and correctly. Choose a patient to start this recall batch.

   If your last batch was processed completely and correctly, click the Yes radio button and then Next to continue.

**Setting Up the Recall Wizard**

The Recall Wizard enables you to generate recalls efficiently and quickly. The Recall Wizard walks you through configuring the wizard so that the recalls you get are the recalls you want. Now time and money are saved and gained.

The next window displays the different ways to select and filter your **Recalls**.

**Select Your Criteria from the Following**

**Recall Type**

Select a specific recall type. *See section Recall Tracking for more information on Recall Types.*

**Patients with Scheduled Preventive Appt**

This option enables you to pull up all those patients with scheduled preventive appointments. If they are scheduled for a service set to update a preventive appointment, they are selected by this criterion.

**And/Or Option**

The And/Or option enables you to combine different criteria:

- Patients with Scheduled Preventive Appointments
- Patients with Scheduled Regular Appointments
- Patients Due for Future Cleanings but no Scheduled Preventive Appointment
- Patients Past Due for Cleanings with No Scheduled Preventive Appt
- Patients Not Seen Since Specified Date

**Patients with Scheduled Reg. Appt.**

If you check this box, all patients with Regular Appointments are pulled into your report.

**Patients Due for Future Cleanings but No Scheduled Preventive Appt.**

Select this checkbox to pull in patients who are due for a cleaning, but are not scheduled for preventive appointments.

**Patients Past Due for Cleanings with No Scheduled Preventive Appt.**

Select this option if you wish to pull up patients who have not come in for their preventive appointment or who are past due on their last recall.

**Patients Not Seen Since Specified Date**

If you want to choose a date range for patients who have not been in for a long time, this is a good report for you. Just check the box and create the date range. You can also combine this report with any of the preceding options.

**Skip Patients Marked Not to Receive Recalls**

Check this box to filter out patients who are not marked to receive recalls.

When you are finished selecting your options, click Next to continue on to Print/Export options.

**Printing and Exporting Options**

The printing and exporting options allow you further customization of your recall data.

1. When you are finished selecting filter criteria for the Recalls, click Next.
Method

Methods of Gathering Recalls:

2. Select the method you want to use for outputting your recalls.
   • Print to paper
   • Send to InContact

E-mailing Recalls

3. Click the Send e-mails to patients with e-mail addresses checkbox to send this batch of recalls to patients set up to receive e-mail correspondence. When the recalls are processed, a window notifies you that patients with e-mail addresses are being e-mailed their recalls first. Patients without e-mail addresses are printed on the selected form for recalls.

   This feature only works with MAPI client e-mail packages, such as Microsoft Outlook and Outlook Express. Consult your hardware technician if you are unsure about your e-mail package.

   When finished processing, a window appears asking if you want to print a report for patients who received recalls via e-mail.

4. Click Yes to print the report.

Print Options

5. Select a print option from the following:
   • You can select two forms of postcards: laser or regular postcards
     The laser postcards are printed on laser printers, such as Hewlett Packard LaserJet Printers, and so on. Regular postcards are those printed on dot matrix printers
   • Choose a Letter pulled from the letters in Lists | Practice Management Lists | General Setup | Letters
     Print a Summary or Detailed Report that gives information on all the patients, including their recall dates
   • Option of creating Regular or Laser Labels
   • Option to print Envelopes

   See the Patterson EagleSoft Hardware Requirements available at www.eaglesoft.net for more information on supported printers.

Messages

Press the F2 key to go to the Messages list and click New to create a message.

6. When printing postcards or sending e-mail recalls, add a message to the postcard. Click on the dropdown list box or the hyperlink to select a message.
Sort By Options:
- Next Preventive Appt
- Next Recall Date
- Next Regular Appt Date
- Patient Date
- Responsible Party Name
- ZIP Code

Sort By

7. Click on the dropdown list box to choose a Sort By option. This feature modifies the recall order and how the recalls are printed on postcards.

Then choose the printer you want from the Printer dropdown list box.

You can select the default Recall printer in File | Preferences | Printer Administration. This box displays all printers you have set up in the system.

The printer usually defaults to the report printer set up in Printer Administration.

Previews and Reports

These options enable quicker and more efficient ways of printing your recalls.

Save time and paper by previewing Recalls. Select Preview Recalls before you print to verify Recalls and to deselect the patients whom you do not want to receive a recall.

The following Recalls to Process preview window appears.

Deselect the checkbox next to a recall if that patient does not want to receive a recall.

The next box, Print Recall Report with Recalls, allows you to print a report of all the recalls that printed out.

Note: This option is only available if detailed or summary report is not selected.
Recall Tracking

Create customized recall types to better manage your patient’s 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 when entering a new patient 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. Select the checkbox Default to designate the selected Recall Type as the default.

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.
Default Recall Type

When using a Recall Type other than the Patient’s default Recall Type, the following message will appear: ‘<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

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 dropdown 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 dropdown list to select the Status. Use the predetermined Provider or select a new one using the dropdown 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.

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

Recall Types and Service Codes

Selecting the checkbox Updates Patient Recall on a Service Code allows you to assign a Recall Type. Use the dropdown list to select the Recall Type that you wish to associate with this particular service code.
(This page has been left blank intentionally.)