Troubleshooting – Unit 10

How to Use the Index

To use the EagleSoft 15.00 Index, first look for the affected area of the software and then look for the submenu listing. For example, if you wanted to look up how to set up drugs for the Rx Writer, look under ‘R’ for Rx Writer and then find Setting Up Drugs in the submenu.

Shortcut Keys and Navigational Hints

Under Window, you can choose to view Practice Management Mode, Clinical Mode or Integrated Mode.

Left-click – Navigate areas or fields within the program. (Single-/double-click the left side of mouse).

Right-click – Can be used in many different areas of the system. To name a few, On Schedule, Reports and in the Account Screen there are three different areas that you can do a right-click. This again is done as an Alternate way to access different areas of the system. InContact, Treatment plan and Walkout screens also have the right-click capabilities. When a mouse appears on the screen, which indicates that with a right-click, there is a list or menu available to you, this will bring up different areas that you can access from that screen.

OK – Saves newly entered information or saves information that you have edited.

Cancel – Cancels information.

Enter – The Enter key on your keyboard will activate the button that is highlighted or outlined or looks three dimensional on the screen in front of you.

Use – Connects the chosen item on a list into the appropriate field. This is found when accessing a list box within a hyperlink.

Edit – This button is used for looking at information listed or for changing the information that has already been entered.

Tab – The Tab Key moves the cursor forward from one entry field down to the next one.

Shift/Tab – Moves the cursor back to the previous field.

Function Keys

F1 – EagleSoft Help File

F2 – Function Key will launch different lists that are available to you when in a particular field (Ex. Person, Service Codes, Employer, Account Alerts, Patient
Alerts, Referrals and Insurance to name a few). This is similar to selecting a hyperlink. F2 will also allow you to view the available option icons on the Virtual Front Office Screen and on the Virtual Clinical Screen.

F3 – Function Key will allow you to view the Patient Photo. **

F4 – Function Key will launch Alerts.

F5 – Function Key will recall the last patient whom you were working on, or if you are entering a new patient, you can use F5 to bring up the last policyholder or responsible party when you are in that particular field.

F6 – Function Key will launch the OnSchedule at Day at a Glance.

F7 – Function Key will launch the OnSchedule at Week at a Glance.

F8 – Function Key will launch the Appointment Search window within the OnSchedule.

F9 – Function Key will open EagleSoft Practice Management and Clinical.**

F10 – Function Key will access your Menu Headings. From here, you can use your arrows on the keyboard to move you to the left, right or you can use the arrows to move you up and down a list that is on the menu.

F11 – Function Key will launch your task list.

F12 – Function Key will launch the patient’s Medical History. **

** equals Clinical.

Navigation

Space Bar – The space bar will provide you with a check mark when you are in that field that has checkboxes or deselect a checkbox by selecting the spacebar again.

Home Telephone Number – If the area code already appears, use the space bar to advance to the next available spot to type the rest of the telephone number.

Highlight a Field – Left-click at either the beginning or end of the information to be deleted and drag the cursor across that information to highlight it. When it turns color (most likely blue), type over it with the correct information. You might also want to highlight a field, right click and copy it so that you can paste it in another field.

Arrow Keys – Used to move the cursor either to the left or the right without deleting any information. The arrow keys are located to the right of your keyboard. Here are a few examples of how you can use them: The arrow keys can be used to make the person either male or female when you are in that field, the down arrow can be used to take you down the list of options within that particular field. The arrows can be used in perio charting. The up and down arrows move the teeth either forward or back a tooth. When you are in the space provided for the salutation, you could use your arrow keys to see your choices.

Backspace – Used to move cursor back one space deleting the character to the left of the cursor.

Delete – Will move your cursor forward one space deleting the character to the right of the cursor.

Accelerator Keys (Alt) – Hold down the alt key and press the key that matches the underlined letter. This is used to access different areas in that screen that you are in without having to tab all the way to it.
Hyperlinks – Are blue underlined words located throughout the software. Select these words to access the quick list box attached to the blue word. (For patients, services, employers, insurance companies, etc.)

Home – Will move the cursor to the beginning of the word or sentence.
End – Will move the cursor to the end of a word or sentence.
Ctrl & Enter – Starts another line. This can be used when creating your messages or anywhere you have a field available for notes.
Ctrl & Home – Moves to the beginning of the document or screen. Selecting Home will also bring your schedule up to the top of the screen.
Ctrl & End – Moves to the end of the document screen.
Ctrl & Delete – Deletes one word at a time.
Ctrl & M – Will bring up the Messenger.
Ctrl & A – Will change the patient arrival indicator in the schedule. Continuing to select on Ctrl A will change the indicator from patient late (red) to arrived (yellow) to in the chair (green).

Additional

Customize your toolbar on each computer by using the right-click on the toolbar and choosing customize. Customize your toolbar for the OnSchedule, Virtual Office, Virtual Clinical, Integrated Screen, Advanced Imaging and the Image Document window. This will add, remove, show the text and move the icons up and down on the placement in the toolbar. You can add virtually all practice management and clinical menu items to any toolbar.

When entering your hours in the provider screen or in the appointment scheduler for the chairs, enter 8am and the system will convert it to the 8:00am format. If the hours are the same, highlight 8:00am, hold down your Ctrl key along with the C key to copy. Tab to the area that you want duplicated and hold down the Ctrl key with the V key to paste the information on the selected area. Military time also works in these fields.

You can either access a patient by typing in their last name, first name, SS#, ID#, Phone#, Chart ID# or you can type in the first few letters of their last name, comma and their first initial of their first name.

In OnSchedule, left-click the arrow in the lower right corner of the appointment and drag the appointment down. This will increase the length of the appointment.

Additional EagleSoft Modules

To broaden the scope of the program and to allow dental offices to customize the functionality of their practice management system, EagleSoft has chosen to integrate with Trojan. If you would like more information on these modules, please contact an EagleSoft Marketing Representative at 1-800-294-8504.

Trojan Services

EagleSoft Practice Management integrates with Electronic Trojan, the online version of the Trojan Insurance Reporting Service. This service will reduce the staff time that is necessary to key your insurance information about your insurance
companies and their insurance coverage. After subscribing with the Trojan Database System (please call 1-800-451-9723 for more information), simply contact us and we will provide you with the necessary software to integrate the Trojan data with the employers, insurance companies and fee schedules information in Practice Management.

**Trojan Managed Care**

Trojan Managed Care enables you to access fee schedule information from your Trojan discs and input those fee schedules into your EagleSoft Fee Schedule Manager. Please call Trojan at 1-800-451-9723 for more information.

**Dual Databases**

*EagleSoft* provides a way for two providers to utilize two databases on the same network. For more information on this feature, contact *EagleSoft’s* Sales Department.

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### The Write Note

*To purchase The Write Note package, please contact your Patterson technology representative.*

Introducing **The Write Note**, Patterson’s suite of marketing and patient based letters.

Under **Utilities**, select **Install The Write Note**. Select the radio button **Install The Write Note Letters**. Select **OK**.

Select **Yes** to continue. Select **No** to cancel the installation.

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### eService

*eService* takes the guesswork and downtime out of addressing your service needs. Using your office’s Internet connection, *eService* captures important data and sends it to *EagleSoft Client Services Department’s* attention. *eService* is a standard part of the **Service Club** benefits at no additional cost to you. Some key components of *eService* are:

**The Compliance Checker**

The **Compliance Checker** informs the user when a machine is out of compliance with *EagleSoft’s* hardware requirements. The **Compliance Checker** is a diagnostic tool designed to identify potential performance issues before they become problems.

The **Compliance Checker** appears once daily when the **EagleSoft** program is started on a machine where components do not conform to **EagleSoft’s** specifications. Your options on the **Compliance Checker** are to **Print Report**, **E-mail Report**, **Save Report** or **Ignore**. Clicking Ignore simply closes the window. Use the FAQ link on the **Compliance Checker** to review articles on each incident listed on the **Compliance Checker**.

**Handling Data**

*EagleSoft* offers a new level of electronic support.

*EagleSoft* captures any system message data and sends it electronically to *EagleSoft Client Services*.

The first occurrence of an error message in *EagleSoft* will prompt you to locate the machine with an **Internet** connection. If the computer you are using is not that
machine, click **browse** and locate the machine with Internet access. Click the name of the Internet computer and click **OK**. This prompt will only appear on the first occurrence.

If you do not have an Internet connection on at least one machine in your office network, you’ll need to call **EagleSoft Support** for assistance with your error messages as you currently do.

**Send System Checks**

Instead of your staff member locating, running, printing, and faxing **system checks**, **file finders**, and **version information**, the **System Check** can capture the information and upload it to **EagleSoft Support** directly. e**Service** uses your Internet connection and **EveryWare for the Web** conduit to provide instant information to **EagleSoft Support** Department.

Browse to the computer with the Internet connection and click **OK**. If this has been previously established, the browse window will not appear. The **System Check** will be automatically sent to **EagleSoft Support**.

If you are not currently Internet capable in the office, click cancel on the **browse** window.

Choose from the following options:
- Save the SnapShot so that it can be uploaded later.
- Save the SnapShot on a floppy disk for mailing to **EagleSoft Support**. The SnapShot will be deleted from your hard drive.
- Print the SnapShot for faxing to **EagleSoft Support**. The SnapShot will be deleted from your hard drive.
- Delete the SnapShot.

Click **OK** to proceed.

**EagleSoft Direct**

For instant updates on **EagleSoft** information, CTC dates, the eNewsletter, **Support** information and more use **EagleSoft Direct**. **EagleSoft Direct** provides pertinent information at the click of a mouse. Control how and when information gets to your office.

In **Practice Management**, Select **Online** and click the **Online Center**. In the **Online Center**, click on the **EagleSoft Direct** button.

To upload files from **EagleSoft Direct Client Services**, click the e**Service** button in Technical Reference. Select **Sync eService Data** to download the information from **EagleSoft Client Services**.

*To upload files from **EagleSoft Direct**, please consult **EagleSoft Client Services** for any additional assistance installing or implementing uploaded data.*
Live Help

Use the **Live Help** desktop icon in the software to request a **Remote Support** session from the **Patterson Technology Center**, **Live Help**, **FAQ** or **E-mail Support**.

To access the **Live Help** menu, select the **Live Help** graphic on the desktop. From the menu, select any of the **Live Help** options.

<table>
<thead>
<tr>
<th>Help</th>
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<tbody>
<tr>
<td>User’s Guide</td>
<td>F1</td>
</tr>
<tr>
<td>EagleSoft 15.00 Overview</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Remote Support from Patterson Technology Center" /></td>
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<tr>
<td>Live Help</td>
<td></td>
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<tr>
<td>FAQ</td>
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<tr>
<td>E-Mail Support</td>
<td></td>
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<tr>
<td><img src="image" alt="About EagleSoft…" /></td>
<td></td>
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</tbody>
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To access support options from the **Menu**, select **Help**. In the **Help** menu, select from the available support options.

**EagleSoft Remote**

To better service our clients, **EagleSoft** has developed **EagleSoft Remote**. Using your Internet connection, your **EagleSoft Client Services technician** can connect to your office to resolve issues faster.

To use **EagleSoft Remote**, select the eService button in **Technical Reference**. Click the **Wait for Connection** button.

The **EagleSoft Remote Current User Properties** window will appear. Enter a **password** to be given to **EagleSoft Client Services** upon request. **Note**: The **Current User Properties** will not launch from here after the initial session.

When a connection has been established, the following window will appear containing your **IP address**, your **Port** and your Remote **Password**. Please provide this information to your **EagleSoft Support Specialist**.

When your session is engaged, the following **Remote** icon will appear in your Windows task bar.

To end your **Remote** session, right-click on the Remote icon and choose **Close EagleSoft Remote**. Choose **End All Client Connections** from the right-click menu to terminate all **Remote Sessions** without disconnecting from the **Internet**. To disconnect from the Internet without closing the **Remote Server**, click the **Disconnect** button under Remote Access Options in Technical Reference.

To change your **Remote** password, double-click on the **Remote** icon in your task bar or right-click the icon and select **Properties**. Clear the current password and type a new one. You may change your password as often as you like.
Remember …
If you have a question or suggestion about Patterson EagleSoft, please don’t hesitate to call us at 1-800-475-5036.

Patterson EagleSoft Support Department hours are as follows: 7 a.m. - 7 p.m., Monday – Thursday, and until 6 p.m. (CST) on Friday. Our staff of trained service representatives will be here to answer all of your questions.