Eaglesoft, a Patterson Technology

New Features Guide
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A New Look

Eaglesoft, a Patterson Technology

Introducing the future of modern dentistry: Eaglesoft 17. New enhancements have been made to the list boxes, Quick Import Images and medical history.

Desktop Icons have a new look.

![Eaglesoft program icon](image1)

Eaglesoft program icon

![Start Messenger Server icon](image2)

Start Messenger Server icon.

Eaglesoft News Center

In the upper corner of the main Eaglesoft screen, click the Eaglesoft News Center button (see below) to view the latest from Patterson. This button is an RSS (Rich Site Summary) feed that connects you to the latest information about Eaglesoft.

![RSS feed icon](image3)

The ‘New’ banner appears when new items are available on the feed.

Right Mouse Click Pointer

Whenever a right-click menu is available, the following indicator will appear.
This indicator is preference specific. To hide this indicator, deselect the preference **Show Right Click Pointer** in **File | General Preferences**.

**New Screens**

The new Front Desk has an updated look but all of the same functionality.

The Operatory home screen has a new look as well.
Fast CheckIn has a fresh new look as well.

### Resizable Floating Panels

In the **Edit Patient** and **Edit Service Code** windows, floating panels can be resized so that both the main window and the open panel can be viewed.

To open a floating panel, select the button on the right side of the window. To resize the window, place the cursor over an edge or a corner. The cursor will become an arrow that allows you to resize the window as desired.
The floating panel will remain open and resized until the panel is closed. If left open, the panel will appear open each time the main window is opened.

List Boxes

Some of the List boxes in 17 have been enhanced for better sorting. Enhanced list boxes let you do more and click less.

All columns can be sorted. Select the column heading to sort your results.

The **Auto Search** option behaves the same as **Search on Each Character** did in previous versions.

Where Can I Find These Changes?

The following is a list of windows that have been updated to reflect this enhanced functionality:

- Smart Invoice
- Patient List
- View Coverage book
- Service Code List
- X-Charge setup
- Insurance Claim
- Lab Cases List
- Account Types List
- Account History Report
- Close Claim
- Drug List
- Insurance Questions
- Laboratories

Choose Secondary Claim window
View Claim
Treatment Plan
Payment Plan
Task Manager
Patient Edit
Route Sheet
Payment Types
Message List
Display Alerts
eClaim Processing
Lab Tracking
Payment Receipt
HCFA Form

The HCFA (health care financing administration) insurance form has been retired. In place of the HCFA insurance form, please use the CMS (centers for Medicare and Medicaid Services) insurance form.

New HIPAA Letters

New HIPAA letters are available via FAQ 18898 for you to update your existing letters.
New Features

Customizable Medical History

Medical History has been re-energized. Not only has Medical History been streamlined but it is now fully customizable. Please review the following section on creating and editing Medical History Forms.

The original medical history form is still available. You can use it just like you always did.

The following will explain how to:

- Create new Medical History forms
- Manage multiple forms
- Use your new Medical History forms
Using the Settings Tab

The new Settings tab helps you control your signature options when saving Medical History forms. To open the Settings, select the **Settings** tab on the side of Medical History.

Set your signature needs in the Settings area **BEFORE** filling out the medical history form.

Making Settings changes during an exam will reset the form to blank.

After making changes, you must close and reopen the form for the change to take effect.

This **Settings** tab replaces the preferences for Medical History that were previously located in the **Preferences** section in Eaglesoft 16.

Use the **Require Signature on** section to prompt for a signature during any modification of a form and on **Fast CheckIn**.

Under Default View, select **Expanded** or **Collapsed**.

Select the checkbox **Use Last Saved Med Hx Exam Data When Starting New Exam** to default the previously recorded medical history information when beginning a new exam.
How to Edit the Default Medical History Form

To make the Medical History form open for editing, you need to create a new Medical History Form. To do so, in the List menu, select Medical History Forms. Select the existing Medical History form and select Edit. The following will appear.

Select Yes. Doing so allows you to virtually 'save as' the original Medical History form. The selected form appears in an editable format. This will allow you to take the base form and add and delete to suit your needs.

In your new form, enter a name for this form so that you can easily identify it from the Medical History Form list. Select the Default checkbox to make this new form the automatic default form for all patients.

NOTE: The original Medical History form cannot be edited but can be used as a template for a new editable form.

Forms are composed of sections, questions and comments.

**Section** – Self-contained segment

**Single Question** – One question with one answer

**List Question** – One question with multiple possible answers
Comment – Open field for entering information  
Spacer – Blank line  
Signature – A field for capturing a signature  
See below for more detail on how to edit or add to your new form.

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How to Delete a Question from the Form

In the edited base form, delete an existing question by selecting the X.

---

How to Add a Single Question to Medical History

A Single Question is a question answered with a single answer

For example:
Question – Are you a new patient?  
Answer – Yes, No

Add a Single Question using one of the four available methods (click and drag, use the Add button or double-click or use the Add? button).

Enter your question in the text field and select Preview to see the form with your changes included. Select OK to save.

Select one of the different answer types, radio button, checkbox or free form.

See How to Use the Options Within a Question section for more on customizing your answer responses.
How to Add a List Question to Medical History

A List Question is a question with a multiple choice answer.

For example:
Question - Are you allergic to any of the following?
Answer – Latex, Nickel, Mint

Add a List Question using one of the four available methods (click and drag, use the Add button or double-click or use the Add?? button).

Enter the question in the Text area.

Use the Settings drop-down to choose either radio button or checkbox as the Answer Type.

Select the plus sign to add the answer options. Enter the answers.

See How to Use the Options Within a Question section for more on customizing your answer responses.

Delete an Answer

Use the orange ‘x’ boxes to remove the corresponding list answer.
Select the ‘+’ button to add a blank field that can be customized for your needs. Include as many answers as you’d like.

*See How to Use the Options Within a Question section for more on customizing your answer responses.*

---

How to Add a Signature Line

Select the Signature icon and drag it, double-click or select the Add button to insert a signature line into your Medical History form.

Use the Signature of section to denote the owner of the signature.

Add a Provider Signature

Use the signature option to add a signature line for the Provider. When using the signatures, be sure to acquire both the Provider signature and the Patient signature at the same time or two copies of the form could be saved.

See the Using the Settings Tab section for more information on signature requirements.

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How to Reorder the Questions

Reorder the sections by selecting the arrow. See the following example.
Selecting the upward arrow moves the selection up one space. Repeat as desired.

Use the downward arrow to move the selection down one space. Repeat as desired.

How to Edit the Sections

To change the title of a section, type a new title in the Section Title field. Select the Show Title checkbox to display the title on the form. Select the Show Border checkbox to place a border around the section on the finished form.

How to Use the Options Within a Question

The Settings menu and Add buttons offer additional options for customizing questions and answers.

Single Question Options

When adding a Single question, select the Settings button to further customize your entry. Select the Answer Type using the drop-down menu. The available options are: Checkbox, RadioButton and FreeForm.

This determines how the question will be answered by the patient.
Select the **Allow** additional comment checkbox to allow patients to add a comment to this question.

Select the desired Alerts settings for the answer. Use the Alerts drop-down menu to select an **Alert** to add.

**Settings**

To create an **Alert** when this question is answered ‘yes’ or the box is selected, select **Yes/Checked**.

To create an **Alert** when the question is answered ‘no’ or left unselected, choose **No/Unchecked**.

To avoid creating an **Alert** for an answer, leave the entire area blank.

**List Question Options**

When adding a **List** question, select the **Settings** button to further customize your entry. Select the **Answer Type** using the drop-down menu. The available options are: **Checkbox** and **RadioButton**.

This determines how the question will be answered by the patient. Select the number of columns needed for the answer section.

**Alert** hyperlink to create a new Alert.

**Answer Settings**

To create an **Alert** when this question is answered ‘yes’ or the box is selected, select **Yes/Checked**.

To create an **Alert** when the answer is ‘no’ or the box is left unselected, choose **No/Unchecked**.

To avoid creating an **Alert** for an answer, leave the entire area blank.

Use the **Alerts** drop-down to select an Alert for the desired answer.
Using the Add buttons

The Add buttons appear at the bottom of each section. Use the Add buttons to include a single question, comment or spacer.

Add ? – Single Question
Select the Add ? button to add an additional question field.

Add ??? – List Question
Select the Add ??? button to add an additional list question field.

Add “ “ – Comment
Select the Add “ “ button to add an additional comment field.

Add || – Spacer
Select the Add || button to insert an additional spacer. Spacers can help make the form easier to read.

How to Create an Entirely New Medical History Form

To create a new Medical History form, customized to your specifics, select the New button.
On the left-hand side, select from the available options. Drag and drop the selection into the body of the window, double-click the selection or select the option and use the **Add** button. The following options are available for creating your form:

Forms are composed of sections, questions and comments.

**Section** – Self-contained segment

**Single Question** – One question with one answer

**List Question** – One question with multiple possible answers

**Comment** – Open field for entering information

**Spacer** – Blank space

**Signature** – A field for capturing a signature

Create your own sections, add your own questions, insert comments and more.

You can also double-click the buttons to add them to the form.

**Click the Icon**

**Drag to the Form Base**

**OR click the Add button**

AND

You can also double-click the buttons to add them to the form.
How to Access Forms from the Edit Patient Window

Select the Edit Patient button to open the Patient window. To select a new form from the Medical History list, select Med History drop-down menu and locate the name of the form.

The redesigned medical history form appears.

Multiple Forms Assigned to the Same Patient

When more than one form type is saved to a patient, the assigned Alerts from both forms will appear. Remove unwanted or out-dated Alerts in one of two ways: Edit Patient or edit the Medical History form.
Removing Alerts in Edit Patient

Edit the Patient by going to **List | Person**, select the desired patient and select **Edit**. In Edit Person, select **Alerts**. In the **Patient Alerts for Patient**, select the Alert that you wish to remove and select the **Remove** button.

Removing Alerts in Medical History

Another way to remove unwanted **Alerts** is to fill out another Medical History for that patient of the same form, answering the questions in a matter that does not generate Alerts.

Medical History Alerts List

Located under **Lists | General Setup | Medical History Alerts**, add, remove, edit or view the alerts that are attached to Medical History forms.

Medical History Form List

The Original Medical History form cannot be edited but it can be used as a template for creating customized forms. Create as many different varieties of medical history as you need.
In the List menu, select Medical History Forms. The default Medical History appears. Use New or Edit to modify or create additional forms.

**Saving a Medical History Form to SmartDoc**

To automatically save a signed form to SmartDoc, select Print Answers to capture BOTH the provider and the patient signature.

**Using Your Newly Created Medical History Form**

The Date field allows you to view previously recorded Medical History forms.
The **Form Type** drop-down list allows you to change forms on-the-fly.

The **Print in One Page** checkbox will shrink the form to a single page but can make it harder to read.

### Collapsing a Section

Use the black corner arrows to collapse sections that you do not wish to use but don’t want to delete.

---

**Medical History Forms and Fast CheckIn**

When accessing Medical History from **Fast CheckIn**, the default form will be used.

Fast CheckIn is even faster with a **No To All** button added. Use the **No To All** button to quickly complete the Medical History.
Medical History Security Settings

Additional security has been added to the following Zones for Medical History:

Patient Records – View Form Builder Forms, Add Form Builder Forms, Edit Form Builder Forms, Delete Form Builder Forms.

List Items/Setup – Form Builder Master Report.

Reporting: All Reports – Form Builder Master Report.

Treatment Plan

Changes have been made to the Treatment Plan window to increase efficiency. Easily update patient information and obtain accurate insurance estimations on each code.

Show Estimation - The Show Estimation window will stay open until you close it. Toggle between services and view the estimation for each without closing and reopening the window.

Patient Header – The Patient Header is now available at all times.

The Treatment Plan window can now be minimized and maximized.
Recalls

A change has been made to the Recall wizard to help clarify the choices. The Send To options are now Patients with Scheduled Preventive Appt., Patients with Scheduled Regular Appt., Patients Due for Cleanings but No Scheduled Preventive Appt. and Patients With Last Visit Date Between.

End of Period Date Range

The End-of-Day, End-of-Month and End-of-Year processes now include a date range selection. In the End-of-Period window, select the checkbox Use Specified Date Range For Printing. This allows you to designate a date-range for those reports which can be filtered by date range.

Reports that display in the End-of-Period screen with an asterisk cannot be printed for a date range. These reports will use the transaction period instead and thus may not match the information on the reports that were generated by a date range.

CDT Update for 2013 Codes

The 2013 CDT Codes are available to install. To update your CDT codes, go to Utilities | Mass Updates | CDT Utility.

WARNING: Do NOT update your CDT codes until all of your insurance companies are accepting the 2013 codes.
The following warning will appear.

Select **Yes** to continue. Select **No** to end this process.

Select the **Start** button on the **CDT 2013 Conversion Utility** window. The following warning appears.
Select OK if you are ready to continue updating your codes. Select Cancel to end.

Select Yes to continue. Select No to end this process.

Select OK.

---

**Provider Notes**

A new security option has been added to make Provider Notes editable by the creating Provider only. This new security setting is located under the **Patient Records** security zone including: **Verify Patient Notes By Other Provider**, **Edit Patient Notes By Other Provider** and **Delete Patient Notes By Other Provider**.

If you already had access to edit patient notes, these security settings will be selected by default.
The 2012 ADA form has been added for paper and electronic submission.

In the Insurance Questions screen at the end of the Walkout process, you can manually enter Diagnosis Codes. This can also be done in the Claims processing screen by selecting the claim and Change Answers. Select either ICD-9 or ICD-10 for Diagnosis Code List Qualifier.

To automatically populate the Diagnosis Code, enter the Diagnosis Code in the Service Code.

To edit the Service Code, go to Lists | Service Code List and edit the desired code. At the bottom of the screen, enter the Diagnosis Code, CPT and Modifier.

Now, you can use a credit card to apply only a portion of the payment. The partial payments feature requires X-Charge version 7.1.7 or higher.

Enter the Account Payment as usual when accepting a credit card payment.

In this example, we attempted to apply $13.17 to the account using a credit card that did not have enough credit available.

The result is that $5.32, the amount available, is applied but the remaining amount is denied.
The **Partial Approval** screen appears to verify the amount approved on the card used. Select **Yes** to continue applying this payment.

The **Credit Card Transaction** window appears. Review the **Approval Amount** and the **Denied Amount**. Select **OK**.

To apply another payment, return to the **Account Payment** screen and apply another payment.

The **CareCredit** bridge provides your office with a direct link to CareCredit’s Online Application, automatically filled with your patient’s demographic information.

Use the CareCredit bridge instead of manually filling out applications.
In the Utilities menu, select Care Credit Interface Setup. In the CareCredit Interface Settings window, select the Supported checkbox. Enter the Merchant Number and Merchant Zip code information. Select OK.

Launch the CareCredit website using the CareCredit button in the Edit Patient window. You can also add the CareCredit icon to the Patient Toolbar.

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Eaglesoft Clinician

Eaglesoft now offers a bridge with Emdeon’s Clinician EHR Lite as part of our eServices offerings. To enroll, contact an eServices Sales Specialist at 800-294-8504.

To set up your bridge, go to Utilities | Clinician Interface Setup.

In the Clinician EHR Settings window, select the checkbox Enable Clinician EHR. Enter your organization number. Select OK.
In the Edit Provider/Staff window, select the Clinician Setup button. In Clinician Setup, enter your User Name and Password information.

![Clinician Setup Window]

After setting up your Clinician settings, you can add the Clinician icon to your Patient toolbar. Selecting the icon will launch the Emdeon Clinician website or select the Clinician button on the Edit Patient screen.

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**Custom Hours By Provider**

In the Provider/Staff window, create a Custom Hour for an individual Provider. To do so, go to Lists > Provider/Staff. Edit the desired Provider. Select the Hours button.

![Provider Hours Window]

In the Provider Hours window, select the Custom Hours button.
Use the Custom Hours window to establish the specific hours for the selected provider. Use the All Providers checkbox to apply the custom hour to all providers.

Post Op Report – New Field

The patient’s cell phone number has been added to the Post Op Report. To add the patient’s cell phone to the patient’s information, go to List | Person | Edit.

Encryption

It is now possible to add simple encryption to your database and log files, adding an additional layer of protection for your office’s data. If you are interested in encrypting your data through Eaglesoft, contact Support at 800.475.5036 for assistance.
The Reports Preview toolbar allows you to better navigate the report preview.

**Search** – Enter the desired text and the Find window locates the text.

**Open** – Allows you to browse to files that are saved, but will only open native format (*.prnx) files.

**Save** – Only allows native format (*.prnx)

**Print** – Select the print options and send the document to print.

**Quick Print** – Sends the document to the default printer using the default settings.

**Scale** – Resize the preview.

**Hand Tool** – The hand tool lets you move the page without scrolling.

**Magnifier** – Zooms to 100%

**Zoom Out** – Click the mouse to decrease by 5%.

**Zoom %** – Manually set the zoom size

**Zoom In** – Click the mouse to increase by 5%.

**Navigation Arrows** – Use the arrows to go to First Page, Previous Page, Next Page, and Last Page

**Multiple Pages** – View multiple pages of the report on the screen at the same time.

**Background Color** – Select the background color of the report.

**Watermark** – Use the Watermark option to add a pale shadow image to a report.

Use the Watermark window to set the text, direction, font, color, size, transparency, position and page range.
**Smartdoc** – Send the report to Smartdoc.

**Export** – Export the report using the drop-down menu. The menu remembers your last selection.

**Send Via Email** – Use the arrow to choose file type for the attachment, icon remembers last choice and uses that by default. The menu remembers the last email selected.

**Exit** – Closes report preview.

### Where Can I Find the Reports Toolbar

The Reports Toolbar is available on the following reports only:

- Payment Plan print-outs
- eClaims Errors Report
- eClaim Real-time Response Report
- eClaim Rejections
- Envelopes
- Mailing Labels
- Laser Labels
- Service Code List Form: Report
- X-Charge Path List Form: Report
- Treatment Plan Form: Presentation
- Smart Invoice
- Patient Registration
- Medical History
- Account History Report
- Patient Chart Label
- eBiz Calculator Report

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### Quick Import for Images

**Quick Import** allows you to ‘map’ a path to an external image directory.
In Advanced Imaging, select the Quick Import tab in the Exam side panel. Right-click the Import folder and select Add Import Directory.

Locate the desired file to import. Select OK.

Now, the Import directory is available in the Quick Import area. Select the plus sign to reveal the images contained in the folder.
Using the Quick Import Images

To view the images in the folder added to quick import, select the plus sign on the tree menu.

```
C:\Users\Desktop\CAMERA
|-- amberabbot.jpg
|-- amberabbot.jpg
|-- amberabbot.jpg
|-- amberabbot.jpg
```

**Preview** - Single click on an image to preview the image in the Advanced Imaging preview panel.

**Import** - Double-click on an image to import the image into Advanced Imaging.

To import the entire directory into the Template or Exam, double-click the entire directory in the tree menu.

To import **Quick Import** images into a **Template**, select the template in the **New Exam** menu or select an existing exam. Select the **Quick Import** menu and then double-click the desired image to add that image into the selected template slot.

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**Exposure Meter**

The Exposure Meter allows you to judge the exposure of the x-rays in **Advanced Imaging**. This preference will be automatically selected in the **X-ray Preferences**.
View the Exposure Meter in Image View and Image Document Window in Advanced Imaging on any image that was acquired after the 17 upgrade.

To no longer use the Exposure Meter, deselect the preference in File | Preferences | X-ray.

Yellow – Underexposed Image
Green – Proper Exposure
Red – Overexposed Image

Eaglesoft 3D Viewer by Dolphin

3D Viewer

Eaglesoft 17.00 offers some of the Eaglesoft 3D Viewer by Dolphin capabilities. Use 3D tools to manipulate and enhance images.

Import an image using DICOM. To access Dolphin 3D, select Advanced Imaging | Window | Dolphin 3D or use the Dolphin 3D toolbar icon.
Modifications made to images in the 3D module can be saved to Eaglesoft. To do so, select the **Send Snapshot** button. From the menu, select **Save to Eaglesoft**.

![Image of Send Snapshot button]

3D images saved in Eaglesoft show in the **Exams** column as **Dolphin Imaging Exams**.

![Image of Eaglesoft Exams column]

**Dolphin Bridge**

**Dolphin Bridge** is now available for use with Eaglesoft 17. To use the Dolphin Bridge, select **Activities | Dolphin Imaging** or add the **Dolphin** icon to the **Clinical** and/or the **Practice Management toolbar**.

The Dolphin software will launch using the patient that you currently have selected in Eaglesoft.

To add an icon to the toolbar, right-click on the toolbar and select **Customize**. Scroll the list of available icons, select the Dolphin icon and select the **Add** button.
Progeny ClearVision® Sensors now integrate with Eaglesoft. Once installed, the Progeny Sensor button will be enabled in the X-ray Preferences window.

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Progeny Vantage Panoramic imaging units now integrate with Eaglesoft.

Select the Progeny Sensor button to open the Progeny Sensor Configuration screen. Use the drop-down arrow to select the Sensor, Panoramic and/or Ceph option. Select the Configure button to configure your Progeny digital option. Select OK to save.

PaloDex

The Instrumentarium PaloDex integration has been added to include the Snapshot sensor and the Orthopantomograph OP30 panoramic imaging devices. To set your preferences, go to Preferences | X-ray and select the Instrumentarium button.

Select Snapshot Sensor and select Preferences.
Review the settings and select OK.

Select the Driver and Sensor Info tab to review the driver information. Select OK to close.
For the **OP30 Panoramic**, select the **OP30** radio button and select **Preferences**.

In the **OP30 Device** tab, review the settings and select **OK** to close.
In the **Settings** tab, review your **Device Connection** and Share information. Select **OK** to close.

In the **Driver Info** tab, review the driver information and select **OK** to close.
Use the 3D with your Sirona images easily with the Sirona 3D toolbar icon. To add an icon to the toolbar, right-click on the toolbar and select Customize. Scroll the list of available icons, select the Sirona 3D icon and select the Add button.
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