New Features Guide
Welcome to Eaglesoft version 20. The following guide will introduce and breakdown all the enhancements and features included in this new version.

**Note History**
Enhancements have been made to Note History to make your notes more customizable and beneficial for your needs.

**Introducing the new Note History Command Center**

- **New Patient Toolbar**
- **Grid Font Slider**
- **Expand or Collapse**
- **Notes Action Button**
- **Enhanced Note Grid**
- **Note Options**
- **Note Preview Area**
- **Note Font Slider**

**Note Buttons**

Use the Search area to search for key words within notes.

Use the Filter button to filter for formats, types, statuses and date range. When a filter is in play, the Filter icon is green.
Use the New Note button to start a new note.

Use the Edit Note button to edit an existing note.

Use the Delete Note button to delete a note.

Use the Print button to print a report containing note content.

Use the Patient Photo button to view the patient’s photo.

**Grid Font Slider, Expand or Collapse and Notes Action Button**

Select the Grid Font Slider to increase or decrease the size of the font in the Note Grid view.

Select the Expand or Collapse button to extend or retract the spacing on the Note Grid.

Select the Note Action button to view a menu of hotkey options for Note History.

**Enhanced Note Grid**

Sortable and filterable columns make it easy to find what you need in the Note Grid.

Right-click on the column header to customize the ledger.

*Note: Columns will be reset to their default(s) once the window is closed.*
Modified By

The Modified by area at the bottom of the window helps you track when and by whom a note has been altered in your Note History.

Note Options

Use the Note Types to select the category for your note. Select the Note Types hyperlink to modify existing Note Types.

Select a Color to provide a ‘visual shorthand’ for identifying your Note Types at a glance.

Select Tooth and Surface, if applicable.

Select an AutoNote, if applicable.

Select the checkbox Display Note on Account Statement to add the current note to the patient’s billing statement.

Select from the available Save options.

Spell Check

The Spell Check option allows you to avoid mistakes while building your library of commonly used words and phrases.

Tailor the dictionary to your specific needs.
Use the Dictionary Words section to add words or edit the existing dictionary contents.

Note Font Slider

Use the Note Font Slider to increase or decrease the size of the font in the Note Preview Area.

Note Filter Options

The Note History Filter allows you to filter for specific Note Formats, Note Types, Note Statuses and Date Range.

Use the Clinical to filter by Chart, General, Image, Perio and PSR.


As noted above, when the Note Filter is active, the icon turns green and a message appears stating that the Filter is active.

For more on Note Filter, see FAQ 35630.

Note: Audio and Scribble Notes have been retired as of version 20.00.
Introducing SmartNotes

Allows you to create prompts to use within AutoNote templates to allow for standardization of your documentation. Note: You must have security access to add/edit/delete SmartNotes.

Setting Up SmartNotes

To setup SmartNotes, select Lists and SmartNotes.

To create a new SmartNote, select New.

To edit an existing SmartNote, select Edit.

By default, the following SmartNotes are included and cannot be edited or deleted:

- Tooth
- Surface
- Root
- Date
- DateTime
- Number
To create a new **SmartNote**, enter:

- **Prompt Name** – The name of the SmartNote, for example: Prescription.
- **Description** – The prompt indicator, for example: What medication are you prescribing?
- **Prompt Text** – The note text that triggers the prompt, for example: RX.
- **Responses** – The potential answers to the prompt, for example: Tylenol 3.

Select OK to save.

**Setting Up SmartNotes in AutoNotes**

**AutoNotes** will need to be set up with the **SmartNote** prompts in order to use them in your responses.

To access AutoNotes, go to **Lists | AutoNotes**

To create a new **AutoNote**, select **New**.

To edit an existing **AutoNote**, select **Edit**.

1. Enter the **Description** and select the **Note Color** that you would like the font to show up as.
2. Place the cursor where the desired prompt should be located.
3. Select and highlight the prompt from the panel on the right side of the screen.
4. Click the `<` button to add the prompt to the note.

Select OK to save.
Using SmartNotes

SmartNotes can currently be used in the Note History only. To use a SmartNote:

1. From the Note History Screen, select the desired AutoNote that includes SmartNote prompts.

2. Select Insert AutoNote.

RX Writer Changes

Now, when you delete a prescription entry prior to processing End-of-Day, the affected prescription appears in the RX Writer with a strike-through over it. Note: This will continue to display in Note History.

A New Look for the Tooth Chart

The Tooth Chart has all of the same functions with a fresh new look.
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<thead>
<tr>
<th>Device Type</th>
<th>Device ID</th>
</tr>
</thead>
<tbody>
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<td>Eaglesoft 20</td>
<td>0731769892000</td>
</tr>
<tr>
<td>Eaglesoft 20 Dual Database CA</td>
<td>C731764842000</td>
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<tr>
<td>Eaglesoft 20 Digital</td>
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<td>0731807832000</td>
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<tr>
<td>Lorin Library</td>
<td>0731781002000</td>
</tr>
</tbody>
</table>