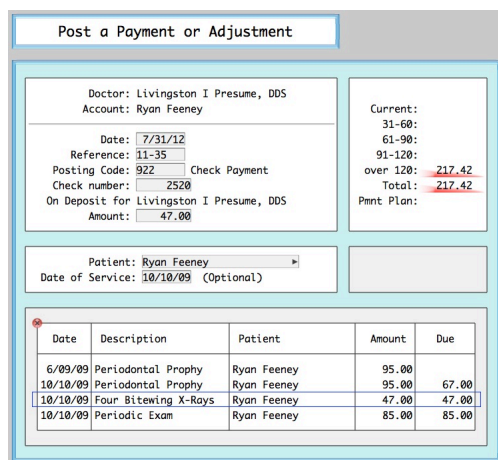


Some New Software Features for You!

Date of Service on Payments and Adjustments

As many of you have probably noticed, the Payments and Adjustments screen now includes a date field titled "Date of Service". In the past, if you were using the "Open Item" accounting option, insurance payments and credits would apply to the transactions on the form but private payments and credits would apply to the oldest balance. Specifying the patient on payments or adjustments and specifying the producer on adjustments could instruct the software to apply the credit based on patient or producer. Payments or adjustments posted on the charge screen would apply to the charges posted on that day.

With this update you can now force a private payment or adjustment to apply to services performed on any date. When posting a payment or adjustment and entering the date of service, you may use the search key or icon to show the ledger. Selecting a transaction will choose that date. Note that the ledger shown for this purpose displays the amount receivable on each transaction. If a private payment applies to more than one date of service, you can break it down into multiple payment transactions and group them like you would for an insurance check.

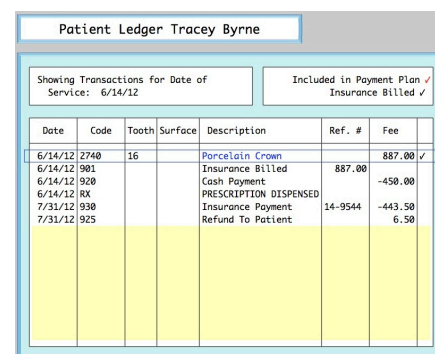


Date	Description	Patient	Amount	Due
6/09/09	Periodontal Prophy	Ryan Feeney	95.00	
10/10/09	Periodontal Prophy	Ryan Feeney	95.00	67.00
10/10/09	Four Bitewing X-Rays	Ryan Feeney	47.00	47.00
10/10/09	Periodic Exam	Ryan Feeney	85.00	85.00

The patient and date of service fields on the payment screen are optional. There is a item in miscellaneous options that determines whether or not the cursor stops at patient and date of service when a payment is entered. If this option is turned off, you can still move the cursor up to either field.

Date of Service in the Patient Ledger

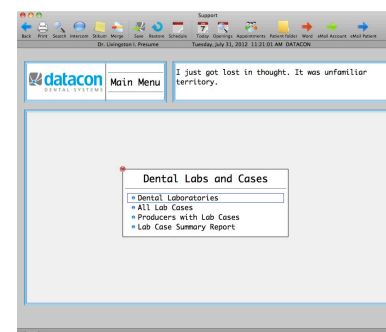
The patient ledger now includes a search option that allows you to see anything related to a particular date of service. By default, the patient ledger only shows financial transactions. When you search for a date of service, the ledger will also display chart notes, prescriptions, and medical alerts posted on that date. In addition to transactions posted on the requested date of service, the software will display any payments or adjustments posted to that date of service and all insurance transactions that are attached to any form that billed for treatments on that date.



Date	Code	Tooth	Surface	Description	Ref. #	Fee
6/14/12	2740	16		Porcelain Crown		887.00
6/14/12	901			Insurance Billed	887.00	887.00
6/14/12	920			Cash Payment		-450.00
6/14/12	RX			PRESCRIPTION DISPENSED		
7/31/12	930			Insurance Payment	14-9544	-443.50
7/31/12	925			Refund To Patient		6.50

Dental Labs and Lab Cases

Our most recent update brings a whole new area of functionality to the software. Prior to this, labs or lab cases could be tracked using User Defined Lists but now both are integrated into the software. On the Main Menu on the lower right, there is a new item titled Dental Labs and Cases. There are currently four items: Dental Laboratories, All Lab Cases, Producers with Lab Cases, and Lab Case Summary Report. The Patient screen under Patient Chart includes a new item titled Lab Cases. The visit screen in the list of today's patients also provides access to Lab Cases.



Dental Laboratories

Any number of dental labs can be created. Each lab record includes name and address, phone and fax numbers, eMail address, contact name, specialty and notes. The Dental Laboratory screen shows this information and a monthly summary of delivered cases with the number of cases and the lab fees for each month. A list of all cases sent to this lab is available here. This list shows patient names, case status and a relevant date plus notes on the case. Each lab also has a ledger that allows notes to be posted.

Dental Laboratories	
Name	Notes
Santa Rosa Prosthetics	Quotes a 2-week turnaround time. Free delivery.
Invisalign	Be sure to doublecheck forms.
Bridges Of Madison Co.	Located out of state - double check quoted delivery dates
Santa Rosa Implants	Always call to confirm method of delivery (USPS, Courier)

Lab Cases

The patient screen and the visit screen for today's patients both now include a menu item for Lab Cases. This selection shows a list of cases for the patient. Cases are created by adding to this list. The information on a lab case includes the lab, patient, and producer plus the case status, notes on the case, lab fees, and three dates. The dates on a lab case are Date of Service, Date Case Sent, and Delivery Date. When a case is added the Date of Service is automatically set by the software. When the Case Status is

Patient Information - Amy Jones 4928

Account Name: Mr. Walter Jones Home: 773-7878
Address: 1725 Burgundy Place Work: (800) 773-7878
Santa Rosa, CA 95404
Account Details
Account Notes..... Ins Billed \$7751.00

Patient Name: Jones, Amy

Dental Lab: Bridges Of Madison Co. Case Status
Producer: Will I. Pullem, D.D.S. ☐ Case Sent
Date of Service: 7/8/12 ☐ Case Re-Sent
Date Case Sent: 7/8/12 ☒ Delivered
Delivery Date: 7/19/12 ☐ Re-Done
Lab Fees: 228.00 ☐ Completed

Edit Notes #15 PFM shade C4

Patient with a completed Lab Case

changed to "Case Sent" the Date Case Sent field is set to today. The estimated Delivery Date can be entered at this time. When the Case Status is set to "Delivered" the Delivery Date is set to today. Lab Fees can be entered when the case is delivered and the software can generate a report at month end to reconcile with billing from each lab. Case Status can also be set to "Case Re-Sent" if a case is sent back for changes, "Re-Done" when the case has to be re-done, and "Completed" after the patient's visit.

Producers with Lab Cases

This selection from the Labs and Cases area on the main menu shows a list of all producers that have any lab case assigned to them. Selecting a doctor name from the list will show the list of cases for that doctor. We expect that this will be a handy place for the doctor or assistant to review the status of any of their cases that are pending.

Lab Cases for Will I. Pullem, D.D.S.			
Patient	Status	Date	Notes
Jennifer C. Raine	Re-Done	7/23/12	
Amy Jones	Delivered	7/19/12	#15 PFM shade C4

Lab Case Summary Report

The Lab Case Summary Report provides an easy way to get summary and detailed information about cases sent or delivered during the month or any period of time. The report breaks cases down into three categories. These categories are Outstanding Cases, Delivered and Completed Cases, and Cases that were Re-Done. Each category shows patient details plus the total number of cases and the total of the case fees for the category. The Lab Case summary Report can be sorted by Lab for reconciling with billing from the lab, by Doctor on Account for dividing labs fees between partners, or by Producer on Case.

Classes and Events

Classes

New User Training *
Scheduling *
Recall *
Paperless Training
Power User Training *
Doctor's Only Training

* Qualifies for CE Credits

Call today to schedule
your training!

Schedule

Monday, 9/3
Labor Day Observance
Office Closed

Events

ADA Annual Session
San Francisco
Oct 18 - 21, 2012

Visit us at Booth #5209

Lab Case Report - Cases Dated from Jul 15, 2012 to Jul 31, 2012 Printed 7/31/2012 Page 1

Bridges Of Madison Co.

Delivered and Completed Cases

Patient	Date	Lab Fee	Notes
Amy Jones	7/19/12	220.00	#15 PFM shade C4
Total Lab Fees		220.00	1 Delivered and Completed

Invisalign

Outstanding Cases

Patient	Date	Lab Fee	Notes
Flo Jones	7/16/12		
Total Lab Fees			1 Outstanding

Delivered and Completed Cases

Patient	Date	Lab Fee	Notes
Mr. Sonny Johnson	7/16/12	123.00	
Tracey Byrne	7/25/12	2500.00	
Total Lab Fees		2623.00	2 Delivered and Completed

Cases that were Re-Done

Patient	Date	Lab Fee	Notes
Jennifer C. Raine	7/23/12	654.00	
Total Lab Fees		654.00	1 Re-Done

