

**WE ARE  
READY  
TO HELP**

**Patterson Dental  
Arizona Branch:**

2240 W. Broadway Rd, Ste 110  
Mesa, AZ 85202



**Smart. Streamlined. Simple.**

20PD0083 (8/19)

**CONTACT YOUR  
LOCAL EXPERTS  
TODAY.**

To schedule a training contact:

**Bethany Neumann**

Patterson Technology Advisor

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**EAGLESOFT  
TRAINING  
OPTIONS**



## TRAINING WITH PATTERSON TECHNOLOGY ADVISORS

Maximize your Eaglesoft software with on-site training with a local expert trainer. Learn what your local technology advisor can do for you.

Possible Eaglesoft topics to be covered in a 4-hour half day session or pick and choose for a combined 8-hour full day session.

### Eaglesoft 101:

This session is for both new users and new hires. It serves as a refresher on the basics of Eaglesoft.

- Entering responsible parties, policy holders and patients
- Entering referral source
- Exploding Codes
- IntelliCare: icons that make your schedule more efficient
- How to schedule patients
- How to do walkouts
- How to take payments and navigate the Account screen
- Basics of the Chart Module, treatment planning and notes

### Reports to Grow Your Practice:

Deep dive into Eaglesoft reports and how to utilize them. This is a session for practice managers, accounting staff and practice owners.

- Reports to run daily, monthly and yearly
- Reports that can be filtered
- How to export reports to Excel
- How to utilize Quick Reports and Quick Report batches to letters
- Create letters with merge fields
- How to utilize practice analysis reports

### Optimizing Treatment Plans and Reports:

This is a session for office managers and all key accounting staff members.

- Utilize treatment plans for case acceptance
- Phase treatment plans, print by phase or options
- Utilize treatment presentations with images
- Create and receive preauthorizations
- Helpful treatment reports

### IntelliCare:

This session is for all team members. IntelliCare is a useful tool to utilize daily within Eaglesoft to make your practice run efficiently. Learn to create IntelliCare icons or pop-ups to inform your team of:

- Patients due for X-rays
- Patients overdue for prophylaxis
- Patients missing important information: email, HIPAA or insurance
- Overdue accounts that have not made a payment in a specific date range
- Be alerted of patients with outstanding treatment plans
- Alerts of patient birthdays
- Alert for patients who have not had a comprehensive exam in 3 years
- Helpful tools with morning huddles, chart audits and much more

### Database Clean-Up:

Learn how to clean up key areas in your database that have been overlooked and are affecting reporting and overall efficiency of your Eaglesoft software. This session is for practice managers and front office staff.

- Outstanding treatment plans
- Insurance and predeterminations
- Insurance companies and employers
- Accounts receivables – debits and credits
- Patient list
- Recall

### Managing Insurance:

This is a session for practice managers and front office staff.

- Entering and updating fee schedules
- Coverage books
- Supplemental insurance
- Creating and receiving preauthorizations
- Employer notes (e.g. frequencies)
- Entering bulk payments
- Reviewing Claims window
- Outstanding claims

## TRAININGS FOR THE CLINICAL TEAM

### Digital X-rays and Intraoral (IO) Camera to Increase Case Acceptance:

Learn to streamline Eaglesoft imaging to be most efficient. This is a session for all clinical team members.

- Use and integration of IO camera and how to track usage
- Customized templates for IO and X-rays
- Importing and exporting images
- Saving images to document groups
- How to create custom printouts for referrals
- Utilizing enhancements of images
- Customizing toolbars for ease of use
- Transferring images and comparing images
- Printing and emailing images

### All Things Clinical:

A session for the clinical team.

- Customizing chart setup
- Customizing Quick Pick buttons
- Use of Exploding Codes for treatment plans and walkouts
- Charting versus treatment planning
- Adding new conditions
- Custom draw types
- Customizing toolbars
- Reports that clinical staff should review
- Tips and tricks



**Any training session can be grouped with another or can be booked as a stand-alone.**

**Sessions can also be customized per office's needs.**

*4-hour, 8-hour & custom training blocks available*  
[www.AZpattersonEDU.com](http://www.AZpattersonEDU.com)

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