GENERAL

eaglesoft version 16 user guide

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Introduction

Welcome to the definitive Eaglesoft Version 16 User Guide. Whether you are a seasoned dental professional or a new practitioner just starting out, this comprehensive manual will walk you through every aspect of the latest Eaglesoft release. From initial installation to advanced charting and billing, you will find clear instructions, practical tips, and troubleshooting advice that will help you get the most out of this powerful practice management solution.

Eaglesoft is renowned for its intuitive interface, robust patient record capabilities, and seamless integration with dental imaging and lab systems. Version 16 builds on that legacy, adding new features such as enhanced appointment scheduling, improved insurance verification, and a modernized charting module. This guide focuses on the user experience, so you can hit the ground running without wading through dense technical documentation.

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Overview of Eaglesoft Version /16

Eaglesoft Version 16 is a cloud enabled, all in one practice management platform that streamlines clinical workflow, improves patient engagement, and boosts revenue. Key highlights include:

- Modernized User Interface: A cleaner layout with customizable dashboards.
- Enhanced Charting: Drag and drop tooth selection, 3 D imaging integration, and real time treatment planning.
- Improved Insurance Workflow: Automatic eligibility checks and claim status updates.
- Advanced Scheduling: Smart reminders, group appointments, and mobile access.
- Analytics Dashboard: Real time metrics on collections, patient flow, and practice performance.

These features are designed to reduce administrative burden, minimize errors, and elevate the patient experience.

System Requirements

Before installing Eaglesoft Version 16, verify that your hardware and software meet the following minimum specifications:

- Operating System: Windows 10/11 (64 bit) or macOS 12.0+.
- Processor: Intel Core i5 or equivalent.
- RAM: 8 /GB (16 /GB recommended for larger practices).
- Hard Drive: 500 /GB SSD (minimum).
- Network: Broadband connection with at least 10 /Mbps upload/download for cloud features.
- Display: 1920 /× /1080 resolution or higher.
- Software Dependencies: .NET Framework 4.8, Java Runtime Environment 8, and Microsoft SQL Server 2019 (or later) for on premise installations.

For remote or multi location setups, consider a dedicated server or a virtual private network (VPN) to ensure secure data transmission.

Installation and Setup

Follow these steps to install Eaglesoft Version 16 on a local machine or server. For cloud based deployments, refer to the vendor's hosting instructions.

1. Download the Installer: Log into the Eaglesoft portal, navigate to the "Downloads" section, and select the appropriate installer for your operating system.
2. Run the Installer: Double click the downloaded file. If prompted by User Account Control, click Yes.
3. Choose Installation Type: Select Standard for most users. Advanced users may choose Custom to specify components.
4. Accept License Agreement: Read the terms and click Accept.
5. Specify Install Path: Keep the default folder or choose a custom location.
6. Install Dependencies: The installer will automatically install required runtime libraries.
7. Complete Installation: Click Install and wait for the process to finish.
8. Launch the Application: After installation, click Finish and open Eaglesoft.
9. Initial Setup Wizard: The wizard will guide you through database connection, user account creation, and basic configuration.
10. Activate License: Enter your license key or connect to the vendor's licensing server.

Once the wizard completes, you are ready to start using Eaglesoft Version /16.

User Interface Overview

The user interface is designed to be intuitive, with a focus on speed and clarity. Key components include:

- Navigation Bar: Located on the left, it provides quick access to Patient Records, Charting, Billing, Scheduling, and Reports.
- Dashboard: A customizable home screen displaying key metrics, upcoming appointments, and recent activity.
- Ribbon Menu: Context sensitive options appear based on the active module.
- Toolbar: Quick access icons for common actions such as "New Patient," "Print Chart," or "Send Reminder."
- Patient List: A searchable table showing patient demographics, last visit, and status.

Use the **Search Bar** at the top right to find patients, treatments, or documents quickly. Hovering over icons reveals tooltips for additional guidance.

Patient Management

Adding a New Patient

To add a new patient, click **New Patient** in the toolbar or navigate to **Patients > Add Patient**.

1. Enter Demographics: Fill in name, address, phone, email, and date of birth.
2. Insurance Information: Add primary and secondary insurance details. The system will automatically verify eligibility if the Auto Verify option is enabled.
3. Emergency Contact: Provide contact details for emergencies.
4. Medical History: Input known conditions, allergies, and medication list.
5. Save: Click Save to create the patient record.

Managing Patient Records

Once a patient is added, you can access their record by double clicking the patient's name in the list. The record is divided into tabs:

- Overview: Quick glance at demographics, last visit, and upcoming appointments.
- Chart: Clinical notes, radiographs, and treatment plans.
- Billing: Invoices, payment history, and claim status.
- Insurance: Policy details and eligibility history.
- Documents: Uploaded PDFs, consent forms, and lab results.

Use the **Quick Actions** panel on the right to schedule appointments, send reminders, or add new treatments.

Charting and Treatment Planning

Accessing the Charting Module

Navigate to **Patients > Charting** or click the **Chart** icon on the toolbar. The charting window features a 2 D and 3 D tooth map, with drag and drop functionality.

Creating a Treatment Plan

1. Select Teeth: Drag the teeth you wish to treat onto the chart.
2. Choose Procedures: From the procedure list, double click to add to the selected teeth.
3. Set Codes: Assign CPT and ICD 10 codes automatically via the Auto Code feature.
4. Add Notes: Use the free form text box to detail clinical findings and recommendations.
5. Save Plan: Click Save to store the treatment plan in the patient's chart.

Integrating Radiographs

Upload digital radiographs by clicking **Import Image**. Eaglesoft Version /16 supports DICOM and JPEG formats. The images will appear in the **Images** tab, and you can annotate directly on the screen.

Clinical Documentation

Use the **Documentation** panel to record progress notes, impressions, and instructions. Templates are available for routine procedures (e.g., fillings, crowns, orthodontics). To create a custom template, go to **Settings > Templates > New Template**.

Billing & Insurance

Invoice Generation

After a treatment plan is finalized, generate an invoice by selecting **Billing > Create Invoice**. The system will pre populate line items based on the treatment codes. Verify totals before printing or sending electronically.

Insurance Verification

Click **Insurance > Verify Eligibility** for a patient. Eaglesoft Version 16 connects to major insurance carriers in real time, returning coverage details, copays, and pre authorization requirements. The results are automatically added to the patient's chart.

Claim Submission

To submit a claim, navigate to **Billing > Submit Claim**. The system packages the claim data, attaches the necessary documents, and sends it to the insurer. Claim status updates appear in the **Claims** tab.

Payment Processing

Payments can be recorded in cash, credit, or electronic transfer. Use the **Payments** module to apply payments to invoices, generate receipts, and reconcile accounts. The **Cash Flow** report provides daily summaries.

Scheduling & Calendar

Creating Appointments

Open the **Calendar** view and double click a time slot. The appointment form includes:

- Patient: Search or add new.
- Provider: Assign dentist or hygienist.
- Location: Select the clinic or procedure room.
- Procedure: Choose from the procedure list.
- Duration: Auto populate based on procedure type.
- Notes: Add any special instructions.

Click **Save** to confirm. The appointment appears on the provider's calendar and triggers automated reminders.

Smart Reminders

Eaglesoft Version

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