GENERAL

eaglesoft user guide

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Eaglesoft User Guide: Mastering Your Dental Practice Management Software

Running a dental practice is a complex blend of clinical skill, patient service, and business acumen. In today's fast paced world, the right technology can streamline every aspect of that blend, from charting and scheduling to billing and reporting. **Eaglesoft** is one of the most widely adopted practice management solutions in the United States, offering a comprehensive suite of tools that help dentists, hygienists, and office managers keep their practices running smoothly.

Whether you're a seasoned professional who has used Eaglesoft for years or a new user just installing the software, this guide will walk you through the key features, best practices, and troubleshooting tips that will help you get the most out of your investment. By the end, you'll have a solid foundation for navigating the interface, customizing settings, and ensuring your practice remains compliant and efficient.

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Overview of Eaglesoft

Eaglesoft, developed by **Carestream Dental**, is a cloud based dental practice management system that integrates electronic health records (EHR), appointment scheduling, billing, and imaging into a single, user friendly platform. The software is designed to support practices of all sizes, from solo practitioners to large multi specialty groups.

Key strengths of Eaglesoft include:

- Intuitive User Interface: A modern dashboard that presents essential information at a glance.
- Integrated Imaging: Direct access to digital radiographs and intra oral images.
- Robust Billing: Seamless insurance claim submission and payment posting.
- Customizable Templates: Pre built and user created forms for charting, notes, and treatment plans.
- Mobile Accessibility: A companion app that allows clinicians to review records and schedule appointments on the go.

Understanding these core components will help you navigate the user guide more effectively and identify the features that matter most to your practice.

Getting Started: Installation & Initial Setup

1. System Requirements

Before installing Eaglesoft, verify that your hardware and network meet the following minimum specifications:

- Operating System: Windows 10/11 (64 bit) or macOS 10.15+.
- Processor: Dual core 2.0 /GHz or higher.
- RAM: 8 /GB (16 /GB recommended for larger practices).
- Hard Drive: At least 500 /GB of available space.
- Internet Connection: Minimum 5 /Mbps download/upload for cloud operations.

2. Downloading the Software

Visit the official Eaglesoft website and navigate to the “Downloads” section. Choose the version that matches your operating system. If you’re part of a multi location practice, you may need to download the enterprise edition.

3. Installation Steps

1. Run the installer file.
2. Accept the license agreement.
3. Select the installation directory (default is usually fine).
4. Choose whether to enable automatic updates.
5. Finish the installation and restart your computer.

4. Initial Configuration

Upon first launch, you’ll be prompted to set up a few critical settings:

- Practice Profile: Enter your practice name, address, tax ID, and contact details.
- Network Configuration: If you’re using a local server, specify the server path. For cloud based access, log in with your credentials.
- Security Settings: Create a master password and configure user roles (e.g., clinician, hygienist, receptionist).

Once these steps are completed, you’ll be greeted by the main dashboard, ready to begin adding patients and workflows.

Navigating the Interface

Familiarizing yourself with the layout is essential to using Eaglesoft efficiently. The main components are:

- Top Menu Bar: Contains global functions such as File, Edit, View, and Help.
- Left Sidebar: Quick links to Patients, Calendar, Billing, Reports, and Settings.
- Central Workspace: Displays patient charts, treatment plans, or billing screens depending on your selection.
- Bottom Status Bar: Shows system messages, version info, and login status.

Keyboard shortcuts can speed up routine tasks. For example, pressing **Ctrl+N** creates a new patient record, while **Ctrl+S** saves changes. Refer to the built in Help menu for a full list of shortcuts.

Patient Management

Adding a New Patient

1. Click Patients in the left sidebar.
2. Select New Patient from the drop down menu.
3. Fill in personal details: name, DOB, gender, contact information.
4. Enter insurance information if available.
5. Attach any relevant documents (e.g., referral letters).
6. Click Save to create the record.

Editing Existing Records

To update patient information, open the patient's chart, click **Edit** in the top right corner, make the necessary changes, and press **Save**. The system logs all edits for audit purposes.

Patient Search and Filtering

Eaglesoft offers powerful search capabilities:

- Search Bar: Quick lookup by name, ID, or phone number.
- Filter Options: Narrow results by insurance plan, last visit, or appointment status.
- Advanced Search: Combine multiple criteria for more precise results.

Managing Patient History

Each patient's chart contains a comprehensive history section, including:

- Past Treatments: Visual timeline of procedures.
- Medical & Dental History: Allergies, medications, and systemic conditions.
- Radiographs: Embedded images with annotations.
- Clinical Notes: Written by clinicians during visits.

Use the **Export** feature to generate PDF or Excel reports for sharing with patients or other specialists.

Charting and Clinical Workflow

1. Charting Basics

Charting is at the heart of Eaglesoft's clinical functionality. Each tooth is represented by a 3D diagram that allows clinicians to:

- Mark missing or decayed surfaces.
- Indicate restorations, fillings, or crowns.
- Attach diagnostic codes (ICD 10, CDT).

2. Treatment Planning

After charting, clinicians can create a detailed treatment plan:

1. Open the patient's chart and navigate to the Treatment Plan tab.
2. Select Add Plan and choose from pre built templates (e.g., "Full Mouth Rehabilitation").
3. Assign CPT codes, estimate costs, and set priority levels.
4. Attach supporting documents such as x rays or patient consent forms.
5. Save and send the plan to the patient via the built in patient portal.

3. Clinical Notes and Documentation

Clinical notes should be concise yet comprehensive. Eaglesoft supports:

- Voice to Text: Convert dictation into written notes.
- Auto Fill: Pre populate common phrases (e.g., "Patient reports no pain").

- Signature Pads: Capture digital signatures for consent forms.

4. Imaging Integration

Digital radiographs are automatically linked to the patient's chart:

- Upload DICOM files directly from the imaging device.
- Annotate images with arrows, labels, and measurements.
- Use the Zoom and Pan tools for detailed examination.

Scheduling & Calendar Management

1. Creating Appointments

1. Open the Calendar view.
2. Select the desired date and time slot.
3. Choose the patient and the provider (dentist, hygienist, or assistant).
4. Assign the appointment type (e.g., cleaning, filling, consultation).
5. Set reminders (email, SMS, or phone call).
6. Click Save to confirm.

2. Managing Cancellations and Rescheduling

Eaglesoft tracks cancellations in real time. When a patient cancels, the system automatically frees the slot for rebooking. For rescheduling, simply drag the appointment to a new time or use the **Reschedule** button.

3. Group Scheduling and Shared Calendars

For multi provider practices, shared calendars ensure visibility across the team:

- Assign color codes to each provider.
- Set up recurring appointments for regular cleanings.
- Use the Resource Availability feature to avoid double booking.

4. Patient Reminders

Automated reminders reduce no shows. Configure the following options:

- Email Reminders: Sent 48 /hours before the appointment.
- SMS Alerts: Sent 24 /hours prior.

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