



# BUSINESS MATTERS

## Removing a provider from the schedule

Occasionally, you may need to add, remove or change a provider in your schedule. In this article, we will walk you through how to make those changes.

### Removing a provider who is no longer with your practice:

1. From the schedule, go to **Tools** and then **Reassign Appointments**.
2. Click on the **Reassign Appointments Currently Using Resource:** button and select the provider you are removing.
3. Click on to **To:** button and select the new provider.
4. Leave the defaults set as they are for the date and days to reassign all appointments from today forward on all days of the week
5. Be sure to mark the box to include appointments and templates in the organizer.
6. Click **Apply**.
7. Click **Yes** on the confirmation screen.

### Removing a provider from the schedule:

1. From the **DAISY** menu, select **Appointment**, select **Configure** and then select **Schedules**.
2. Select your schedule from the **Search For—Schedule** browser.
3. Click **OK**.
4. Select the Resource you would like to remove and click the red minus sign.
5. Save your changes.

## Coming soon in DAISY 4.6 - ICD-10 diagnosis codes on claims

Diagnosis codes can be attached to procedures on a dental or medical claim. Effective October 1, 2015, the use of ICD-10 diagnosis codes will replace the ICD-9 codes. Learn how to enter new diagnosis codes and attach them to procedures on a claim in DAISY by watching a video demonstration [here](#).

To access a search tool to find ICD-10 codes, click [here](#).

## DAISY User Meetings

### Montana DAISY User Meeting

Friday, September 25  
9:00 a.m. - 1:30 p.m.  
Holiday Inn Kalispell  
Click [here](#) to register

### Portland DAISY User Meeting

Friday, October 9  
9:00 a.m. - 1:30 p.m.  
Moda Tower—Downtown Portland  
Click [here](#) to register

## Billing questions?

Please update your records to reflect the current contact information.

For all billing inquiries, please contact Oksana Ilinich at 503-952-5235.

For all sales inquiries, please email us at [sales@dmcdental.com](mailto:sales@dmcdental.com).





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## What's new at DMC

You asked. We delivered.  
DAISY 4.6 is in beta!

### DAISY

- Ledger claim enhancements
- Tertiary insurance
- Ignore benefits used when billing preventative and diagnostic services on specific plans
- eRx - Electronically prescribe controlled substances\*

### Reports

- Prescription Types report includes additional details
- Enhanced Goal tracking
- Demographic reports
- FSA billing receipt

...and much more!

\*DAISY add-on service

## NEA FastAttach

Sign up for NEA FastAttach today and receive FREE registration (a \$200 value), plus one month free. Click [here](#). Promo code: DAISYRZ1M

### Benefits of digital attachments:

Faster delivery, unlimited use  
No more "lost" attachments  
Use any digital imaging system

## Using the sum feature in the ledger

Did you know that when you are in a ledger, you could have the computer add a certain combination of transactions?

1. Hold down the **Ctrl** button, and left click on several transaction lines, (this should highlight each line you have clicked).
2. Keep the **Ctrl** button held down and then, right-click in the ledger and choose **Sum Selected Transactions**.
3. Look in the lower right hand corner of the window and you will see **Total Selected \$—.—**.

You can choose any combination of Charges, Adjustments or Payments.

The screenshot shows the DAISY Ledger for Account #13393. The window title is "Ledger for Account #13393". The menu bar includes File, Edit, View, Reports, Documents, Tools, DAISY, and Help. The toolbar contains icons for Schedule, Account, Patient, Recall Mgr, Transactions, Claim Hist, Reports, Practice, List Maint, and Procedures. The main area displays account information for Account 13393, Guarantor: Abbott, Shannon S, and Provider: Lorey DDS, Michelle P. Below this is an "Account Aging" table and "Payment Estimates" showing insurance and patient portions due. The main ledger table has columns for Post Dt, DOS/Recv, Name, Code, Description, Th, Srf./Qd, Amount, CR, Balance, Invoice Date, Deductible, and Billing Provider. A context menu is open over the ledger, with "Sum Selected Transactions" highlighted. Other menu options include "New Ledger Claim...", "Reverse Charge", "Refund to Credit Card", "Transfer to Another Account...", "Filter Ledger", "Show only charges waiting for insurance", "Hide Reversals", "View Remit", "View Distribution", "Open Another Ledger...", "Open Account 13393", "Open Patient Shannon S Abbott", "Open Transactions", "Open Claim History", and "Open Related Claim". A color key at the bottom identifies Reversal (grey), Charge (blue), Payment (red), and Adjustment (green). The status bar at the bottom indicates "Added by: DMCHelp 08/13/2015 10:02 AM Edited By: DMCHelp 08/".





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## Farewell, Jody!

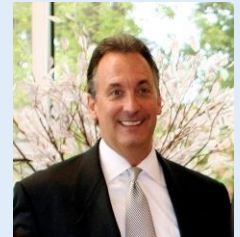
It is with mixed emotions that we announce Jody's departure from DMC. Although we are very happy for his decision to pursue a career in the high tech industry, it will be a great loss for DMC.

Jody has been with DMC just short of two years. During this time, he has built many strong relationships with our customers, vendors and internal staff members. His relationship with the dental community is admirable. Jody always put the best interest of DMC at the forefront of his customer interactions and sales opportunities and worked hard to provide quality services and products to our customers. Please join us in wishing Jody good luck in all of his future endeavors.

For any sales inquiries, please contact the DMC sales department at 800-368-6401 or by email at [sales@dmcdental.com](mailto:sales@dmcdental.com).



## From the desk of Chris Verbiest



DBC and DMC work closely to provide the best products and services to dental practices. We share your concern for HIPAA and privacy practices so that is why we've asked Chris Verbiest, VP of DBC to offer some tips for you:

- Encrypt your emails, servers and all portable devices.
- Perform regular backups.
- Protect your business critical patient data with an on-site and off-site backup solution.
- Don't open unsolicited web links.
- Use caution when opening attachments.
- Use passwords or physical locks to keep sensitive electronic data and physical files accessible only to those who need it to do their jobs.
- If you have employees that work off-site, limit the use of portable technology. Make sure you have a policy in place to ensure the security of your patient health information (PHI).
- Train employees on proper care and control of PHI and PII. Document processes and conduct regular training sessions as well as security audits to ensure staff compliance.

We have prepared and have made available, for free, a template of policies and procedures for you to use in your practice. Contact Shelley Campbell at 503-952-5271 for your copy. DBC is DMC's sister company and is also a subsidiary of Moda.

### Monday – Friday 8 a.m. – 5 p.m.

Contact us at 503-243-3966 or 800-368-6401

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