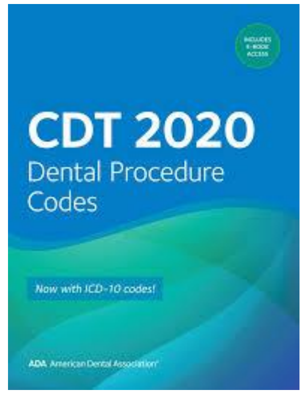
# Diamond Dental Software

**Our 35th Year!**

*What's New in Version 5.5*

## New CDT 2020 Dental Procedure Codes



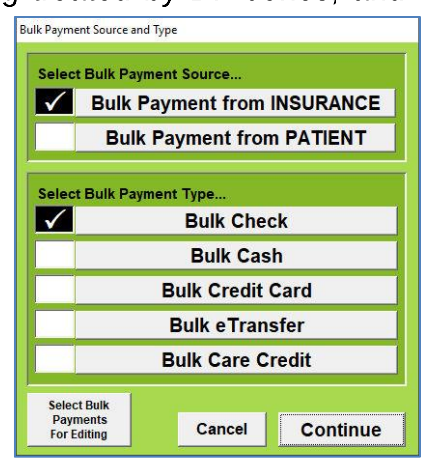

The American Dental Association has updated the dental procedure codes that you use with the new CDT (Current Dental Terminology) for 2020. The 2020 update is a significant one. The 2020 edition includes all CDT codes and descriptors, and is fully updated with 37 new codes, five revised codes, and six deleted codes. New and revised codes fill in the coding gaps and more precisely identify areas of the oral cavity, which leads to quicker reimbursements and more accurate record keeping. Insurance carriers have already sent letters to dentists informing them that the new codes will be required for 2020. Diamond Dental version 5.5 contains an easy to run update wizard that will update your procedure file to the new CDT 2020 standard. This update is retroactive, so if you have missed some CDT updates from the past, those updates will also be included when you run the update wizard. It is important to keep your procedure file up to date so you can take advantage of the new procedures codes that have been introduced. It is equally important to prevent claim rejection by not continuing to submit claims containing procedure codes that have been deleted from the current CDT 2020 standard.

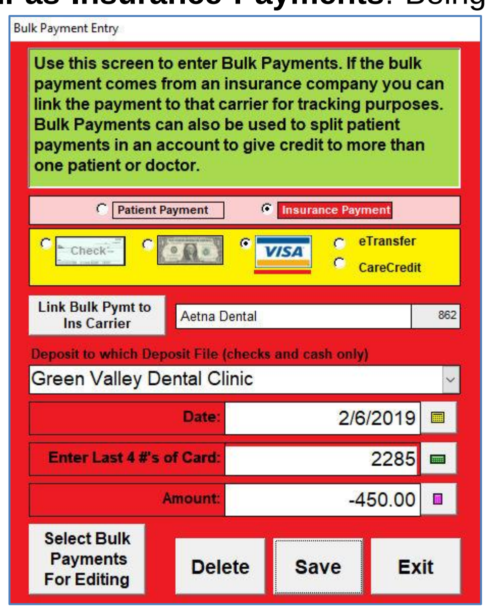
## Bulk Check Entry Completely Overhauled

**Bulk Check Entry**: Insurance payors use Bulk Checks to pay the dentist for many patients using one check. Diamond's Bulk Check Entry allows you to enter that check into your Deposit file and then split the check into the individual amounts that give credit to each patient covered by the bulk check. Starting with version 5.5, the Bulk Check Entry system has been greatly expanded and is now called *Bulk Payment Entry* as it can apply to any payment.

**Bulk Payments are no longer limited to just checks**: Any type of payment can now be a bulk payment. The payment types include: *Checks*, *Cash*, *Credit Cards*, *Electronic Transfers*, and *Care Credit*.

**Bulk Payments can now include Patient Payments as well as Insurance Payments**: Being able to post Bulk Payments for Patient Payments has many advantages. Here is a common example: suppose you have a family account with the mother and two children in for treatment today. The mother is being treated by Dr. Jones, and one of the children is seeing Dr. Smith, with the other child seeing Dr. Vasquez. During checkout, the mother pays the entire bill with a credit card. But how do the individual doctors get financial credit for the treatment they provided? With the new Bulk Payment Entry system, you will post the credit card payment as a "Bulk Credit Card Payment", and then post each



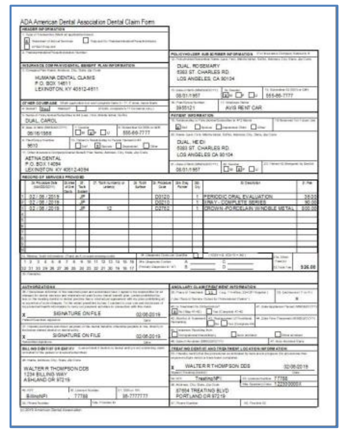



individual patient as being a part of that Bulk Credit Card Payment. As you post each patient you assign the payment to the doctor who performed the treatment. The patient will only see the credit card payment on their statement, but the treating doctors will get collection credit for the treatment that they performed.

**Creating the Bulk Payment**: Refer to the two images at the bottom of the previous page. When creating a Bulk Payment, you are first presented with the green *Source and Type* screen. Here you will select whether the payment is from insurance or the patient, and you will also select the payment type which could be Check, Cash, Credit Card, Electronic Transfer, or Care Credit. You will then continue on to the red Bulk Payment Entry screen. On the Bulk Payment screen, you will just need to enter the check or ID number and the amount. The Patient/Insurance choice will already be selected as well as the Payment Type. If this payment is from Insurance the linked insurance carrier will also be selected for you. Another new feature of the Bulk Payment module is Insurance / Carrier Payment Tracking. This will be discussed further in the next section.

# The New 2019 ADA Claim Form

The ADA Claim form was last changed in 2012. Now after seven years the ADA has once again changed the standard Dental Claim form. The changes are reported to make the claim form more HIPAA compliant.



# The New Comprehensive Payment Report

The Comprehensive Payment Report has been updated to accommodate the new features of the Bulk Payment Entry system (discussed above).

**A new column for Payor Source:** This column displays the payment source. In the case of a patient payment the word “Patient” will display. In the case of an insurance payment the insurance carrier name will display.

**Insurance Carrier Totals:** At the bottom of the report there is a breakdown showing the total amounts paid by each carrier. This can be sorted alphabetically by carrier name or by Amount paid with the largest amount at the top.

Comprehensive Payment Report

2/6/2019

From 2/6/2019 To 2/6/2019

No Limits

| Name | Acc # | Date | Payor | Type | DDS | Check Number | Amount |
|---|---|---|---|---|---|---|---|
| Alaimo, Corazon | 5773 | 2/6/2019 | Royal Insurance | eTransfer | WT | eTransfer | 720.00 |
| Dual2, Jacqueline | 6292 | 2/6/2019 | Humana Dental Claims | Check | WT | 6789 | 50.00 |
| Dual3, Imogene C | 5961 | 2/6/2019 | Washington Dental Serv | Check | WT | 00445 | 125.00 |
| Ireland, Casey G | 5726 | 2/6/2019 | Patient | Check | WT | 4560 | 175.00 |
| Krider, Dustin | 3075 | 2/6/2019 | Aetna Dental | Check | WT | 2366 | 100.00 |
| Bulk Credit Card | | 2/6/2019 | Bulk Credit | Credit Card | | 2285 | 450.00 |
| Abraham, Toni A | 3258 | 2/6/2019 | Aetna Dental | Credit Card | WT | Part of Bulk | -150.00 |
| Babcock, Mickey S | 5706 | 2/6/2019 | Aetna Dental | Credit Card | WT | Part of Bulk | -50.00 |
| Dual, Heidi | 1065 | 2/6/2019 | Aetna Dental | Credit Card | WT | Part of Bulk | -250.00 |
| | | | | | | Remainder = | 0.00 |
| Bulk eTransfer | | 2/6/2019 | Bulk eTrans | eTransfer | | Bulk eTransfer | 300.00 |
| Beard, Casey | 1093 | 2/6/2019 | Patient | eTransfer | WT | Part of Bulk | -135.00 |
| Beard, Melissa | 1093 | 2/6/2019 | Patient | eTransfer | WD | Part of Bulk | -165.00 |
| | | | | | | Remainder = | 0.00 |

| | | | |
|---|---|---|---|
| **Total Payments:** | **1920.00** | From Checks: | 450.00 |
| From Patient: | 475.00 | From Cash: | 0.00 |
| From Insurance: | 1445.00 | From Credit: | 450.00 |
| | | From eTransfers: | 1020.00 |
| | | From Care Credit: | 0.00 |

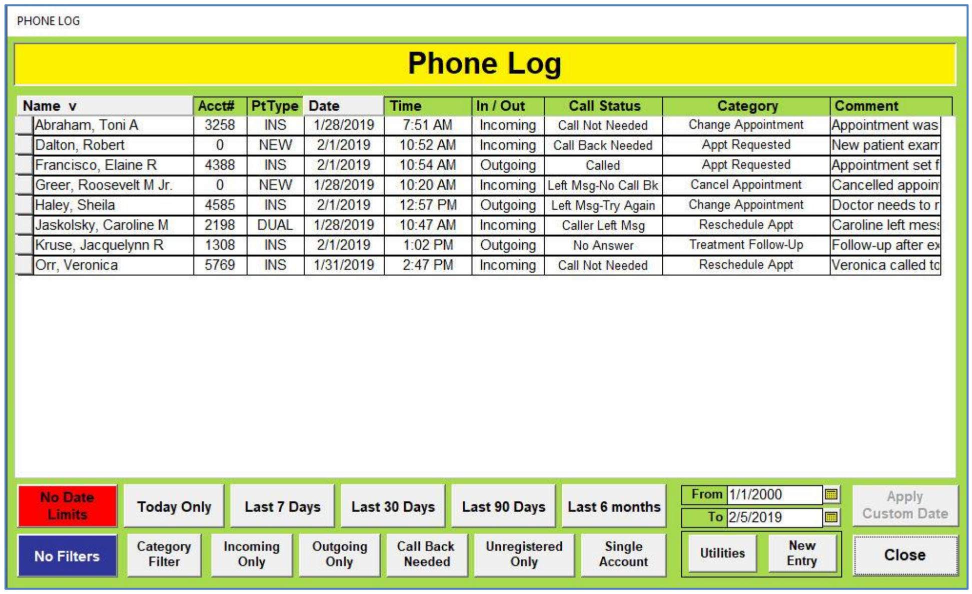
| Insurance Carrier Totals | Amount | Carrier ID |
|---|---|---|
| Aetna Dental | $550.00 | 862 |
| Humana Dental Claims | $50.00 | 209 |
| Royal Insurance | $720.00 | 546 |
| Washington Dental Service | $125.00 | 594 |

# Phone Log Tracking

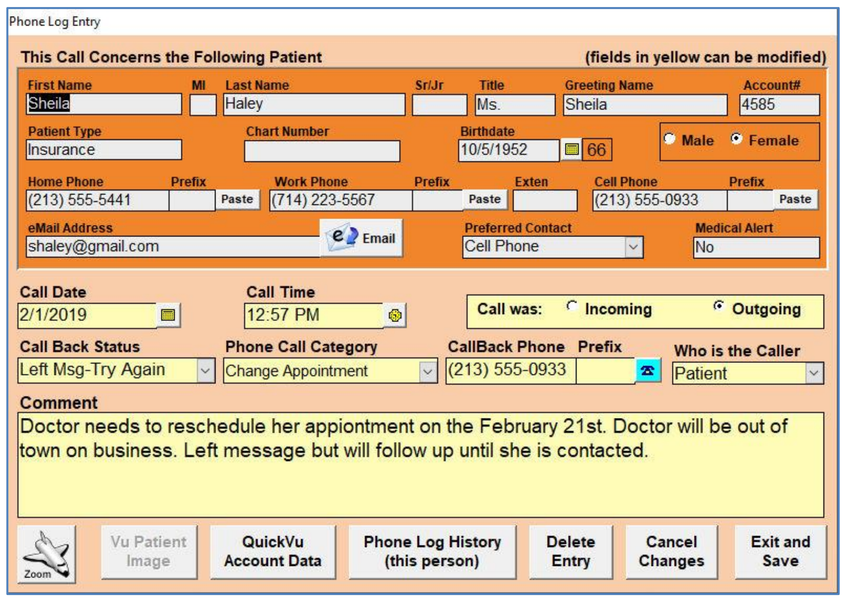
In a busy dental office, the telephone can be in constant use, either for incoming or outgoing calls. These phone calls are the lifeline of your business and as such need to be tracked in an organized fashion.

Features: The Phone Log screen (seen next page) displays quickly from a new button on the Main Menu. At a glance you can see who has recently called or has been called. The calls can be sorted either by caller name, or by the date and time of call with the most recent call seen at the top. You can see whether the caller called you or you called the caller.

The *Call Status* column indicates if a call back is needed or if the call has been resolved. Each call can be put in a category (of your design) and be given a comment (of unlimited length).




**Creating a Phone Log Entry:** When you create a Phone Log entry you will be taken to this screen. For existing patients, the top section will be filled in for you. Much of the bottom section will also be filled in but you will select the *Call Back Status* which indicates if a call back will be needed and optionally the *Category* and *Comment* fields if desired.



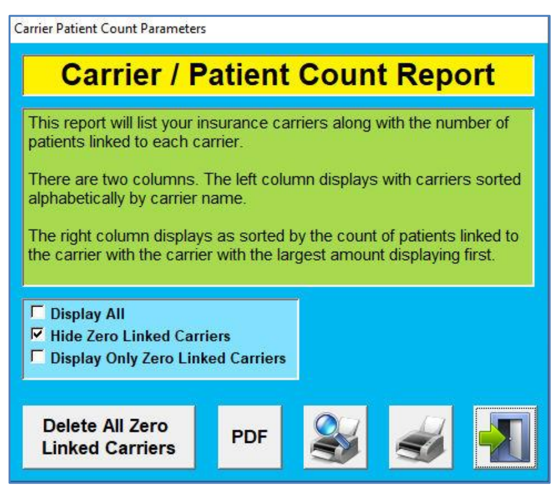

If the caller is not a registered patient you will need to additionally enter their name, birth date, gender, and phone number.

If you click on a name on the Phone Log screen (seen on the previous page) you will also be taken to this screen where you can examine the entry with its full detail. From this screen you can also edit, or delete the entry.

**Phone Log Report:** The *Phone Log Report* (not shown) is essentially a print out of the Phone Log screen. The date ranges and filters used on the Phone Log screen carry over to the report and will display the same names.

# Carrier/Patient Count Report

The *Carrier / Patient Count Report* lists all your insurance carriers and displays how many patients are linked to each carrier. The report presents with two columns. Each column contains all your insurance carriers but the left column is sorted alphabetically by carrier name and the right column is sorted by the number of patients linked to the carrier with the carrier with the highest number of patients listed first and then descending down.



**Three Report Formats:** The report can be displayed in three formats: *Display All Carriers, Hide Zero Linked Carriers, or Display Only Zero Linked Carriers*.

**Find Your Most Active and Least Active Carriers:** You will be able to see at a glance which are most and least active, and in particular the carriers with no patients linked to them.

**Delete All Zero Linked Carriers with a Single Click:** Carriers that are not linked to any patients have no function in the program and merely clutter the carrier file. On the report's parameter screen (seen above) click the *Delete All Zero Linked Carriers* button to remove all these unnecessary carriers with a single click.

**Carrier Patient Count Report**

Monday, February 11, 2019

Filter Type: Hide Zero Linked Carriers

| Carrier Name | Pt Count | ID# | Carrier Name | Pt Count | ID# |
|---|---|---|---|---|---|
| AARP Delta Dental | 1 | 901 | Metropolitan Life | 282 | 636 |
| Aetna | 5 | 930 | Aetna Dental | 152 | 862 |
| Aetna Dental | 152 | 862 | Guardian | 100 | 708 |
| AIG | 6 | 576 | Delta Dental Plan Of IL | 84 | 182 |
| AIG Life Ins. Co. | 2 | 920 | PreDent Plan For Dental Care | 56 | 83 |
| Allied Benefit Systems | 11 | 17 | CIGNA | 45 | 131 |
| Allied Benefit Systems | 1 | 892 | Humana Dental Claims | 37 | 209 |
| American Dental Association | 11 | 577 | Guardian (First Commonwealth) | 35 | 821 |
| American Medical Security | 5 | 32 | Delta Dental Plan Of MI | 34 | 191 |
| Ameritas Life | 4 | 14 | CIGNA | 32 | 790 |
| Anthem Blue Cross & Blue Shield | 1 | 882 | Principal | 27 | 379 |
| Anthem Blue Cross And Blue Shield | 3 | 791 | CompBenefits | 27 | 166 |
| Anthem Blue Cross And Blue Shield | 1 | 795 | BlueCare Dental PPO | 24 | 876 |
| Assurant Employee Benefits | 3 | 875 | United Health Care Dental | 23 | 683 |
| BCBS Of Illinois | 3 | 904 | Professional Benefit Administrators | 23 | 377 |
| BCBS Of Michigan | 1 | 929 | CompBenefits | 21 | 724 |
| Benefit Administrative Systems Ltd. | 7 | 84 | BlueCross BlueShield FEP Claims | 21 | 924 |
| Benefit Systems & Services, Inc. | 1 | 97 | Delta USA | 13 | 194 |
| Blue Care Dental PPO | 9 | 919 | Allied Benefit Systems | 11 | 17 |
| Blue Cross Blue Shield | 2 | 906 | American Dental Association | 11 | 577 |
| Blue Cross Dental Services | 1 | 907 | CompBenefits | 10 | 588 |
| BlueCare Dental | 9 | 894 | Delta Dental Of CA | 9 | 828 |
| BlueCare Dental PPO | 24 | 876 | Delta USA | 9 | 703 |
| BlueCare Dental Traditional | 5 | 888 | Blue Care Dental PPO | 9 | 919 |
| BlueCross BlueShield FEP Claims | 21 | 924 | Great West | 9 | 769 |
| BlueCross BlueShield Of AL | 1 | 878 | BlueCare Dental | 9 | 894 |
| BlueCross BlueShield Of IL | 8 | 893 | Delta Dental Plan Of GA | 8 | 195 |
| BlueCross BlueShield Of MI | 1 | 706 | United Healthcare | 8 | 931 |

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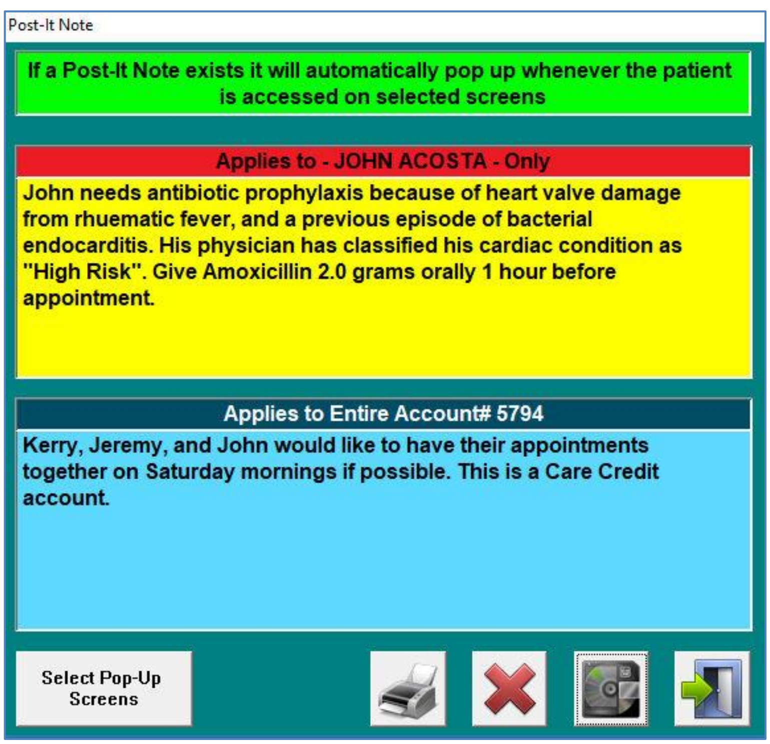
# New Windows Update from Microsoft Crashes the Charting Program

In January of 2019 Microsoft came out with a new update for Windows 10. The update is called "*Feature update to Windows 10, version 1809*". Since Microsoft now updates computers spontaneously, without asking, the update can just happen at any time. This update caused Diamond Dental to crash when accessing the clinical or perio charts. As soon as we found out about this new problem, we created a fix for it. This fix has been incorporated into version 5.5.

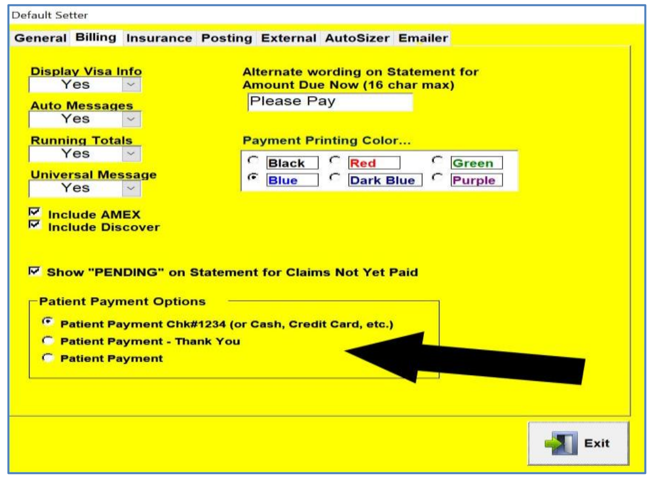
# New Post-It Notes

There have been some improvements made to the Post-It Note program. Now Post-It Note screen displays two messages. The top (yellow) note applies to the particular patient that you have accessed. The bottom (blue) note applies to the account as a whole, not just the currently accessed patient. The Post-It Note will pop up if either of these notes contains text. In addition, the new Post-It Note module allows you to select which screens will display the Post-It Note pop up. Previously the "Posting" screen and the "Appointment Setter" screen were the only screens to display the pop up. Now, by clicking the new *Select Pop-Up Screens* button you can customize which screens will or will not pop up the Post-It Note.



# Customize *Patient Payment on Billing Statement*

Three new options appear on the User Defaults screen which allows you to customize the way *Patient Payments* appear on the Billing Statements that you send your patients. These three options are:




Option 1: This option will have a descriptor such as,

- Patient Payment Chk#12345
- Patient Payment (Credit Card)
- Patient Payment (Cash)
- Patient Payment (Care Credit) and etc.

Option 2: This option will display,

- Patient Payment – Thank You

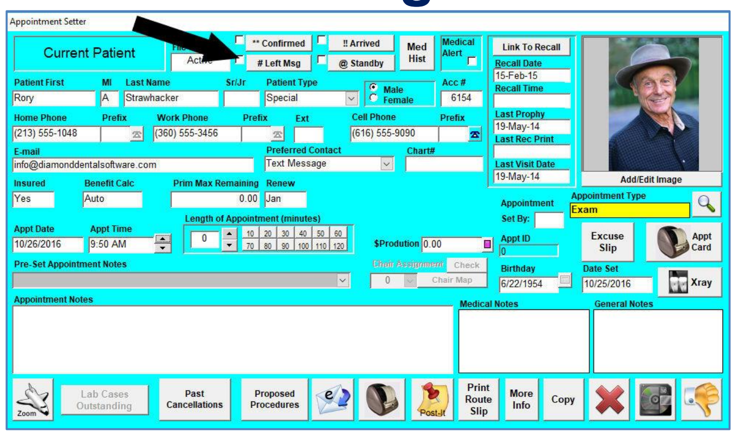
Option 3: This option will simply say,

- Patient Payment

Use whichever choice satisfies your practice's needs.

# 'Left Message' Tag Added to Scheduling

When confirming appointments, you have the option on the *Appointment Setter* screen to mark an appointment as "Confirmed" if you have actually contacted the patient and verified that they are coming in. However, if you are calling (or texting) and do not actually reach the person but get their voice mail instead, you now have the option to mark that attempt as "Left Message". Leaving a message is not as desirable as a live confirmation, but it gives the office a better understanding of that patient's confirmation status. In addition, the **Schedule Report** has been modified to generate a list of patients who have been marked with the "Left Message" tag to give the office an easy contact list for another attempt to get firm confirmations.




# Insurance Processing Using Office Name for Billing Entity Improved

When creating paper or electronic insurance claims if you want your office name to display as the Billing Entity, you have had a problem. You would have a similar problem if you want a different address to display for the Billing Entity and the Treating Doctor. The problem was that the same name and address would display for both. To get around this problem you were required to create a fictitious doctor to be used as the Billing Doctor. This fictitious doctor would have the correct Office Name and Address that would be used on the Billing side of the claim form or eClaim. This was clumsy and you had to remember not to post using the fictitious doctor because it was not a real doctor. This issue has now been corrected in the latest version. Each doctor entry screen has fields for all these areas of the insurance claim and they display correctly.

# Create PDFs from Any Diamond Dental Report

Now any Diamond Dental Report can be saved as a PDF document. PDF (Portable Document Format) is a universal file format that can be viewed from any computer operating system. As you know, every Diamond Dental Report screen contains a "Print" button to print the report to your printer. Now you will also see a "PDF" button. This will allow you to save the report as a PDF file to any drive, folder, or memory stick on your computer. After the report is saved it will open in Adobe Reader for your inspection. Adobe Reader is a free download from Adobe and is probably already on your computer. You will see that the PDF document will look on screen exactly like the Diamond Dental report appears on paper. The PDF document can be multi-paged and it's searchable. Adobe Reader has a search function where you can enter any string of text characters and you will be brought right to that page in your document with those characters highlighted. PDF documents are the preferred format for attaching to emails as well.

# Prescription Report

The Prescription Report will list all the patients and their prescriptions like the sample report seen to the right. The report is further enhanced by several report filters that allow you to control the print-out. The Prescription Report filters include the following: *Prescription Date Range*; *Limit by One or More Specific Drugs*; *Limit by One or More Prescribing Doctors*; *Narcotic Prescriptions Only*. Several Ascending and Descending Sorting Options also are available.

Prescription Report

4/2/2016

Alphabetic Range From J To J

| Patient Name | Acc# | Rx Date | Rx Drug Name | Disp | Sig (let it be labeled) | Refill | DDS | Narc |
|---|---|---|---|---|---|---|---|---|
| Jackowski, Tony | 1280 | 1/19/2005 | Amoxicillin 250 mg | 30 tabs | 2 stat 1 qid until gone | No | WT | N |
| Jackowski, Tony | 1280 | 1/27/2005 | Vicodin | 10 tabs | 1 Q 6-8 H prn pain | No | WT | Y |
| Jaffer, Philip | 1076 | 4/6/2004 | Amoxicillin 250 mg | i0 TAB! | 2 stat 1 qid until gone | No | WT | N |
| Jestes, Leslie J | 3189 | 8/26/2005 | Amoxicillin 500 mg | 8 | Take 1 tablet 3 times a day until gon | 1 | WT | N |
| Johnson, Patricia A | 4506 | 10/4/2006 | Vicodin | 6 tabs | 1 Q 6-8 H prn pain | 1 | WT | Y |
| Jones, Candace D | 6328 | 9/20/2007 | Peridex/Perioguard- | 1 | Use as directed | 4 | WT | N |
| Jones, Madelaine | 1369 | 12/27/2007 | Vicodin | 8 | 1 Q 6-8 H prn pain | 1 | WT | Y |
| Jordon, Nicole | 2191 | 5/26/2005 | Amoxicillin 250 mg | 30 | 2 stat 1 qid until gone | 1 | WT | N |
| Jordon, Nicole | 2191 | 5/26/2005 | Vicodin | 8 | 1 Q 6-8 H prn pain | No | WT | Y |

Total Patients: 9

# Hide Patient Last Name and Account # from Schedule for HIPAA Compliance

The Appointment Scheduler now allows you to hide patient last names and or account numbers from the appointment scheduler screen in order to follow HIPAA rules. If you choose to use this feature the patient's name will only show the first name and the first letter of the last name.

# Hygienist Column Added to Posting Screen

In previous versions the Posting screen which, displays the posted procedures, only showed the doctor who performed the procedure. However, there was no indication if it was a hygienist who performed the procedure. You actually had to click on the procedure to bring up the Charge Entry screen to see if a hygienist did the procedure. We have now added a Hygiene column to the Posting screen to allow you to quickly check if a hygienist performed the procedure and specifically which hygienist.

# Print Recall Even if Recall is Not Set

You may have hundreds of patients who are not actually set in Diamond Dental's recall system, however; you may want to send them recall announcements anyway. Setting recall for hundreds of patients to get them into the recall system in order to generate recall for them would be very time consuming. This new feature will allow you to generate recall postcards, recall email, or any of the other recall printing options of the recall system by basing patient qualification on their Last Visit Date. Setting them on recall is Not Required! So, if you want to generate recalls for patients who have not had a visit within the last year, or the last two years, or whatever date range you wish, this is now possible.