



# Diamond Dental Software

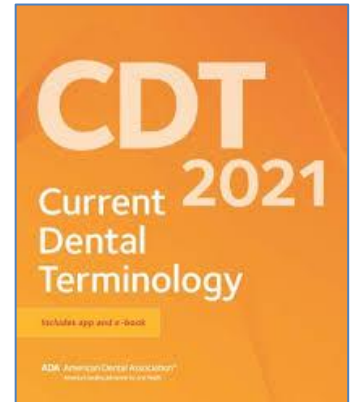


Our 35th Year!

*What's New in Version 5.6*

## New CDT 2021 Dental Procedure Codes

The American Dental Association has updated the dental procedure codes that you use with the new CDT (Current Dental Terminology) for 2021. The 2021 update is a significant one with 61 changes. The 2021 edition includes all CDT codes and descriptors, and is fully updated with 28 new codes, 29 revised codes, and 4 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 2021. Diamond Dental version 5.7 contains an easy to run update wizard that will update your procedure file to the new CDT 2021 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 2021 standard.



## Post-Op Contact Report

If you like to check up on your patients after performing certain invasive procedures such as extractions, root canals, implants, surgeries, etc., then this new report can help you. With this report you will select procedures from your Procedure File that you would normally follow up with a phone call to see how your patient is doing. This procedure list is saved so you only have to select the targeted procedures once. You can then print the report for a particular date (or date range) on which the procedures were performed. You can print the report for all providers or limit the report to a particular doctor or hygienist.

The report itself will list the patient's name, account number, and Patient Type. Also listed are the patient's contact methods which include the home, work and cell phone numbers and the patient's email address. The contact method that has been selected by the patient as the "Preferred Contact Method" will have an asterisk (\*) after it. If the preferred method is a text message, then the cell phone field will have an asterisk with a capital letter T (\*T) after it.

Also listed under the patient's name will be the procedure (or procedures) that qualified this patient for the report. Included for each line item is the procedure code, description, posting date, tooth, surface, performing provider, and whether the item was posted as Done, Started, for Finished.

The screenshot shows the 'Post-Op Contact Report' interface. It features a date range selector with 'From' and 'To' fields, both set to 1/16/2020. There are radio buttons for 'Today Only', 'Month To Date', 'Year To Date', and 'Manual Range'. Below the date range, there are buttons for 'Single Doctor' and 'Single Hygienist'. A red box contains the instruction: 'Select the Procedure Codes you want to include in the Post Op Contact Report. Your selections will be saved and can be modified later. Patients who have had these procedures within the date range above will be included in the report.' At the bottom of the red box are two buttons: 'Pick Procedure Codes to Include' and 'Display Selected Procedures Only'. At the very bottom of the interface are icons for 'PDF', a printer, a scanner, and a folder.

## New Phone Number and Birthdate Search

The new Phone Number search allows you to enter a partial or complete phone number to find a patient. It doesn't matter if the phone number is a Home, Work, or Cell phone number, this search

will search through all of them. As long as you enter at least four or more consecutive numbers, the Phone Search will display all the patients for whom those numbers exist in their phone number. In the sample seen here, 8153 has been entered. You can see the first two listed patients have 8153 as their last four numbers. The rest have 8153 existing somewhere in their phone number. Just select the patient you want and click GO.

This screen does double duty in that you can also search by birthdate. Just click the *Birthdate Search* button and the screen will change. It will now ask for a birthdate and for this the complete birthdate is required in the format of "M/D/YYYY". Again, all the patients with this birthdate will display. You will select the one you want and click GO.

These searches will find all patients who meet the search criteria, whether they are active or have been archived. This special search screen is accessed from the regular Patient Search screen where you will click the button on the right labeled *Phone / Birthdate Search*.

Patient Search

### Which Patients Have This Phone Number

(enter any 4 more more sequential numbers)

Search will include Home, Work, and Cell numbers for patients both Active and Archived

Enter Phone Number - (any 4 or more sequential numbers)  
8153

Phone Search

Find Matching Patients Selected Account # 1742 Birthdate Search

Acct#	Patient Names	Phone Number	Birthdate
1742	Absher, Dennis P	(815) 555-8153	12/9/1962
1742	Allen, Leah	(815) 555-8153	6/30/1963
4752	Gooch, Chance I	(815) 818-1537	8/22/1991
2045	Rice, Jessica	(818) 153-8153	1/6/1979
4752	Whiteside, Abygail L	(815) 818-1537	10/11/1989
3829	Pribble, Barney A	(815) 558-1538	4/9/1956

CLEAR GO

## 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 5.6, 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.

Bulk Payment Source and Type

Select Bulk Payment Source...

Bulk Payment from INSURANCE

Bulk Payment from PATIENT

Select Bulk Payment Type...

Bulk Check

Bulk Cash

Bulk Credit Card

Bulk eTransfer

Bulk Care Credit

Select Bulk Payments For Editing

Cancel Continue

Bulk Payment Entry

Use this screen to enter Bulk Payments. If the bulk payment comes from an insurance company you can link the payment to that carrier for tracking purposes. Bulk Payments can also be used to split patient payments in an account to give credit to more than one patient or doctor.

Patient Payment  Insurance Payment

Check  Cash  VISA  eTransfer  CareCredit

Link Bulk Pymt to Ins Carrier Aetna Dental 862

Deposit to which Deposit File (checks and cash only)  
Green Valley Dental Clinic

Date: 2/6/2019

Enter Last 4 #'s of Card: 2285

Amount: -450.00

Select Bulk Payments For Editing

Delete Save Exit

**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 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.

## 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 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 printout 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.

Phone Log									
Name v	Acct#	PtType	Date	Time	In / Out	Call Status	Category	Comment	
Abraham, Toni A	3258	INS	1/28/2019	7:51 AM	Incoming	Call Not Needed	Change Appointment	Appointment was	
Dalton, Robert	0	NEW	2/1/2019	10:52 AM	Incoming	Call Back Needed	Appt Requested	New patient exam	
Francisco, Elaine R	4388	INS	2/1/2019	10:54 AM	Outgoing	Called	Appt Requested	Appointment set	
Greer, Roosevelt M Jr	0	NEW	1/28/2019	10:20 AM	Incoming	Left Msg-No Call Bk	Cancel Appointment	Cancelled appt	
Haley, Sheila	4585	INS	2/1/2019	12:57 PM	Outgoing	Left Msg-Try Again	Change Appointment	Doctor needs to r	
Jaskolsky, Caroline M	2198	DUAL	1/28/2019	10:47 AM	Incoming	Caller Left Msg	Reschedule Appt	Caroline left mess	
Kruse, Jacquelyn R	1308	INS	2/1/2019	1:02 PM	Outgoing	No Answer	Treatment Follow-Up	Follow-up after ex	
Orr, Veronica	5769	INS	1/31/2019	2:47 PM	Incoming	Call Not Needed	Reschedule Appt	Veronica called to	

Today Only Last 7 Days Last 30 Days Last 90 Days Last 6 months From 1/1/2000 To 2/5/2019 Apply Custom Date  
 Category Filter Incoming Only Outgoing Only Call Back Needed Unregistered Only Single Account Utilities New Entry Close

Phone Log Entry

This Call Concerns the Following Patient (fields in yellow can be modified)

First Name  MI  Last Name  Sr/Jr  Title  Greeting Name  Account#   
 Patient Type  Chart Number  Birthdate   Male  Female  
 Home Phone  Prefix  Work Phone  Prefix  Exten  Cell Phone  Prefix   
 eMail Address  Preferred Contact  Medical Alert  No

Call Date  Call Time  Call was:  Incoming  Outgoing  
 Call Back Status  Phone Call Category  CallBack Phone  Prefix  Who is the Caller

Comment  
 Doctor needs to reschedule her appointment on the February 21st. Doctor will be out of town on business. Left message but will follow up until she is contacted.

# 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 Parameters

### Carrier / Patient Count Report

This report will list your insurance carriers along with the number of patients linked to each carrier.

There are two columns. The left column displays with carriers sorted alphabetically by carrier name.

The right column displays as sorted by the count of patients linked to the carrier with the carrier with the largest amount displaying first.

Display All  
 Hide Zero Linked Carriers  
 Display Only Zero Linked Carriers

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	9011	Metropolitan Life	282	636
Aetna	5	930	Aetna Dental	152	862
Aetna Dental	152	862	Guardian	100	709
AIG	6	576	Delta Dental Plan Of IL	84	162
AIG Life Ins. Co.	2	920	ProCrest Plan For Dental Care	58	83
Allied Benefit Systems	11	17	QIGNA	45	131
Allied Benefit Systems	1	892	Humana Dental Claims	37	209
American Dental Association	11	577	Guardian (First Commonwealth)	35	621
American Medical Security	5	32	Delta Dental Plan Of MI	34	191
Ameritas Life	4	14	QIGNA	32	790
Arthem Blue Cross & Blue Shield	1	882	Principal	27	379
Arthem Blue Cross And Blue Shield	3	791	Combenefits	27	186
Arthem Blue Cross And Blue Shield	1	795	BlueCare Dental PPO	24	576
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	Combenefits	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	910	Allied Benefit Systems	11	17
Blue Cross Blue Shield	2	906	American Dental Association	11	577
Blue Cross Dental Services	1	907	Combenefits	10	588
BlueCare Dental	9	894	Delta Dental Of CA	9	628
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	870	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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# Corrected: New Windows Update from Microsoft Crashes the Charting Program

A new update from Microsoft has come out 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 5.6.

# 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

Default Setter

General Billing Insurance Posting External AutoSizer Emailer

Display Visa Info  
 Yes

Auto Messages  
 Yes

Running Totals  
 Yes

Universal Message  
 Yes

Include AMEX  
 Include Discover

Show "PENDING" on Statement for Claims Not Yet Paid

Alternate wording on Statement for Amount Due Now (16 char max)

Payment Printing Color...  
 Black  Red  Green  
 Blue  Dark Blue  Purple

Patient Payment Options  
 Patient Payment Chk#1234 (or Cash, Credit Card, etc.)  
 Patient Payment - Thank You  
 Patient Payment

Exit

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.

## 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*

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	10 TABS	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
Jordan, 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							

*Specific Drugs; Limit by One or More Prescribing Doctors; Narcotic Prescriptions Only.* Several Ascending and Descending Sorting Options also are available.

# The New Comprehensive Payment Report

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

**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 2/9/2019								
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	
<b>Total Payments:</b>	<b>1920.00</b>		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				
<b>Insurance Carrier Totals</b>	<b>Amount</b>	<b>Carrier ID</b>						
Aetna Dental	\$650.00	862						
Humana Dental Claims	\$50.00	209						
Royal Insurance	\$720.00	546						
Washington Dental Service	\$125.00	594						

## 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.