

# EAGLESOFT

## USER GROUP SESSIONS

Want to learn how to make the most of Eaglesoft's powerful features and continue advancing your practice? Join Patterson Technology Advisors at an Eaglesoft User Group session today!

Scan here to sign up!  
Only \$75/session.



View our 2023 schedule below for more information on topics, dates, and times.

### OPTIMIZING INSURANCE, PART 1

**JANUARY 13, 2023**

Gain insight into making service types work for your practice, create efficiencies utilizing fee schedules and coverage books, how to streamline your workflow, and more!

### OPTIMIZING INSURANCE, PART 2

**JANUARY 27, 2023**

Create efficiencies utilizing eServices, become an effective insurance coordinator, document benefits and eligibility, and more!

### FINE TUNE THE ACCOUNTING MACHINE

**FEBRUARY 10, 2023**

Track accounts receivables, proper distribution and redistribution of payments and credits, and more!

### GETTING BACK TO BASICS

**FEBRUARY 24, 2023**

Complete guide on completing walkouts, receiving payments, creating appointments, creating exploding codes, and more!

### THE DIGITAL CHART, PART 1

**MARCH 24, 2023**

Introduction to chartless vs. paperless (and the equipment to make it happen), customize medical history, digital document storage scan, create, import, export, SmartDoc, Perio/PSR charting, and more!

### THE DIGITAL CHART, PART 2

**MARCH 31, 2023**

Learn about charting efficiently (SmartCodes, QuickPicks, and Exploding Codes), gain quick access to TX plans and informed consent, AutoNotes and Smart Notes, Fast CheckIn, and more!

### THE CONFIDENT APPROACH TO TREATMENT PLANS

**APRIL 21, 2023**

Utilize informed consent, create presentations with images, document rejected treatment with signature, and more!

### SPRING CLEANING

**MAY 12, 2023**

Re-energize your treatment plans, get control of your insurance companies list, clean up your claims list, and more!

### SPANISH – YOU ASKED FOR IT

**AUGUST 25, 2023**

Learn about maximizing the edit patient profile, treatment plan next steps, system optimization, and more!

### MASTERING REPORTS

**SEPTEMBER 15, 2023**

Learn how to categorize and search reports, save favorites, add to Quick Reports, sort and filter content, and more!

### THE MORE YOU KNOW

**SEPTEMBER 29, 2023**

More information on IntelliCare (automated chart audits), accounting features, coverage books, reports and filters, treatment plans, and more!

### STAY ON TRACK WITH ONCHEDULE, PART 1

**OCTOBER 6, 2023**

Set up OnSchedule correctly, customize it specifically for your office, and more!

### STAY ON TRACK WITH ONCHEDULE, PART 2

**OCTOBER 20, 2023**

Learn to navigate/customize the patient bar, OnSchedule Toolbar, Quick Fill list, and more!

### MONEY FINDER & SMART DOC

**NOVEMBER 10, 2023**

Learn how to scan and create letters with merges into SmartDoc, find your hygiene retention with Money Finder, locate patients with incomplete perio treatment, and more!

## SESSIONS AVAILABLE:

9 a.m. - 11 a.m.  
12 p.m. - 2 p.m.  
Central Time (CT)