Release Notes DAISY 4.1

NEW FEATURES

- Pop-up reminders
- Online eligibility inquiries
- Maintenance items



2011

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CHAPTER 1 What's New in DAISY 4.1

New Features

Pop-up Reminders

Reminders attached to patients or accounts now open in a pop-up dialog box. The Reminder dialog box opens whenever you access a patient or account that has a reminder attached to it.

In addition, when you access a window associated with a patient, such as the Treatment Plan window, reminders attached to the patient's account also open in a pop-up dialog box.

For more information, see "Pop-up Reminders" on page 5.

Online Eligibility Inquiries

Online eligibility inquiries through Emdeon are now available. Inquiries are made using a new Request Benefit Information icon (
) on the Quick Access toolbar on several DAISY windows.

The Request Benefit Information icon is active only if the company that provides the patient's insurance coverage participates in Emdeon's electronic eligibility inquiry program. Inquiry requests are sent and received via the Internet.

For more information, see "Online Eligibility Inquiries" on page 13.

If you are interested in subscribing to this service, contact DAISY Sales at 503.765.3471 or <u>daisysales@dmcdental.com</u>.



Other Enhancements and Fixes

Accounts

• The patient's age has been added to the Account window under the Patients tab. The patient's age shows in the Age column.

Appointments

- The patient's gender now shows in the Confirm Appointments and Follow Up Appointments windows.
- Past appointments for deleted patients now remain on the schedule, but with the following changes:
 - In the Appointment window, the patient status changes from On File to New.
 - In the Schedule window, the appointment shows the New Patient (Not on File) icon ().
- Users can now access patient details (clinical notes) from the Quick Access toolbar in the Schedule window by using the Details icon (). The icon only shows if an appointment is selected.

Chart

- The patient's age now shows in the Chart window to the left of the preferred account number.
- During a pass that is not a full quadrant (e.g., the Furcation pass), the Perio exam window now shows the teeth in the correct position.

Ledger

- In the Ledger window, entries can now be sorted either by ascending (oldest to newest transaction) or descending order. For more information, see "Modify the Order of Ledger Entries" on page 16.
- The Name column of the Ledger window now displays the patient's full name, including middle initial and suffix.

Mail Merge

• A new Mail Merge template enables you to create a #10 business envelope addressed to a referring provider. For more information, see "Generate a Referring Provider Envelope" on page 18.

Medical Claims

	• In the Claims window and the Claims History window, the medical claim form available for printing from the Reports menu has been updated to the current CMS-1500 format. In addition, a new option has been added to allow users to choose whether to print the form background or to print data only.
	 For Medicare claim submissions, use the "Medical – Data Only (Medicare)" option. Medicare requires the exact color of red used on pre- printed CMS forms available from business supply sources.
	 To submit claims to all insurance companies except Medicare, use the "Medical" option, which now includes the form background.
Patient	
	• The patient's age now shows in the Patient window to the right of the patient's birth date.
Clinical Details	
	• Users can now clear responses from a drop-down list or radio button group in a clinical details form or when filling out a Details template. Cleared responses in a <i>saved</i> Clinical Details form are added to the form's revision history. For more information, see "Clear Responses from Clinical Details Forms" on page 17.
Recall Manager	
	• The patient's cell phone number now shows in the DAISY Recall Manager window under the Patient tab.
Reports	
	• The patient's cell phone number now shows in the following reports:
	 Patient Profile (R1003)
	 Patient List (R1004)
	 Recall by Patient (R1011)
	The patient's Social Security Number has been removed from the following reports:
	 Account Notes (R3012)
	 Acct/Patient (R1001)
	 Financial Arrangement for Account with insurance (R2011)
	 Financial Arrangement for Account without insurance (R2012)
	 Patient Chart (R2601)
	 Patient Medical Alerts (R1023)
	 Patient Notes (R3013)



- Patient Phones (R1006)
- Patient Profile (R1003)
- Patient Tags (R1024)
- Tag Detail List (R1022)
- When a check number is entered in the Check ID column in the Payments tab in the Transactions window, the check number is now included in the following reports:
 - Visit Summary (R2142)
 - Visit Summary with Patient Responsibility (R2143)
 - Account History (R2141)
 - Account Ledger (R2140)
- The Tx Plan Proc. Not Done report (R2003), located in the Treatment Plans folder, now includes tooth numbers and quadrants.
- The Periodontal Graphic Chart (R2701) now has Preview and Archive options.

Search

• Users can now search for the patient's cell phone number in the Search For – Patient and Search for – Person windows. In the search results, a new Cell Phone No. column shows the patient's cell phone number.

Third-Party Integration

- The Open 3rd Party Charting icon () is now available on the Quick Access bar in the following windows:
 - Chart
 - Treatment Plan
 - Appointment
 - Schedule

Transactions

- The Transactions window has two new icons on the Quick Access toolbar:
 - The Account icon (]), which opens the Account window.
 - The Person () icon, which opens the Person window.

CHAPTER 2 Pop-up Reminders

Overview

Patient Reminders

Starting with DAISY 4.1, patient reminders now open in a pop-up dialog box.



The Reminder dialog box opens whenever you access a patient record that has a reminder attached to it. Reminders attached to the patient open in this dialog box when you access the following patient-related windows:

- Patient
- Patient History
- Treatment Plan
- Chart
- Perio Exam
- Appointment Detail, either when you:
 - Open this window with an appointment already selected in the Schedule.
 - Select the patient in the Appointment Detail window.

In the Reminder dialog box, you can check the "Don't show me this again today" check box to dismiss a particular reminder for the rest of the day. This setting is user specific per workstation.

Account Reminders

Also starting with DAISY 4.1, you can add reminders to accounts. Account reminders open in a Reminder pop-up dialog box.





Reminders attached to an account open in the Reminder dialog box when you access the following account-related windows:

- Account
- Ledger

In addition, reminders attached to the patient's account open in a pop-up dialog box when you access the following windows associated with that patient:

- Patient
- Patient History
- Treatment Plan
- Chart
- Perio Exam
- Appointment Detail, either when you:
 - Open this window with an appointment already selected in the Schedule.
 - Select the patient in the Appointment Detail window.

In the Reminder dialog box, users can check the "Don't show me this again today" check box to dismiss a particular reminder for the rest of the day. This setting is user specific per workstation.

Enable Pop-up Reminders

- To enable pop-up reminders for the practice:
 - 1 From the DAISY menu, select Configure, then select Practice Config.
 - 2 In the Practice window, click the System Defaults tab.
 - **3** Check the "Show popup reminder" check box.

O Practice - 9999					
<u>File E</u> dit <u>V</u> iew Reports Documents <u>T</u> ools DAIS <u>Y</u> <u>H</u> elp					
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City Portland	Provider	Smith DDS, I	Richard M	*	
State OR Zip 97	Fee Schedule	Basic	*		
Area Code 503	Account Optic	on Defaults:			
Run Wizard On Statun	Send State	ment			
Prompt for Printing options	Finance Ch	arges			
Closing In Process	Collection N	Vlessages			
Show popup reminder	Print Stater	ment Estimate	S		
Patients older than 12 A use Permanent destition	Patient Reca	II Options			
	Default Recall	Interval 6	Months		
Claims	-Recall Metho	bd			
Default to Benefits Assigned	O Phone	🔿 Card 🛛 💿	Label 🔿 No	ine	
✓ Default to Release Insurance Info. ✓ Always Hold Secondary Claim:	Auto-Creat	e Recall			
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	Prompt for insurance p	UCR updates payments	when posting		
	Ledger CutOf	ff			
	Only show tran	nsactions sinc	e 07/21/1996	~	

4 Click 🗖 , then close the window.





Add a Patient Reminder

Users can add, edit, or delete patient reminders from the Reminders/Tags tab in the Patient window. Each reminder is limited to 60 characters, including spaces.

- To add a reminder for a patient:
 - 1 From the DAISY toolbar, click 🗧 .
 - 2 Search for and select the patient, then click OK.
 - 3 In the Patient window, click the Reminders/Tags tab.
 - 4 In the Reminders section, click 🐢.

	🔘 Patient - Johr	n Vineyard								
	<u>File E</u> dit <u>V</u> iew Re	eports Documents	<u>T</u> ools DAI	S <u>Y</u> <u>H</u> elp						
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	Patient About the second secon	a 🕞 🗌 Inactive	e P (5	hones 503) 212-5613	Ext. Type Home Work		Photo 🍺	99		1
	Birthdate: 05/08/1 Gender: M	949 Age: 62 SSN:				~				
	E-Mail:		<			>				
	Accounts	Guarantor 1		Guarantor 2		Provider	Distant M			
	13627	Rhonda vineyard				Smith DDS,	Richard IVI			
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5	Reminders	• •				User L	Defined Tags	-		
	Date	Reminder				Date	User 1	Fags		
	<u>*</u> 06/11/2011	Do not lay patient	too far ba	ick						
Click here to select										
a reminder from a										
list of canned						<				>
reminders	Added by: Admini	stra 03/22/2005 08	8:58 AM E	Edited By: BET	TY 03/30/2011	11:01 AM				:
	5 In the E	Date colum	ı, type	a differe	ent date, i	f needed	•			
		1 /	4.41	л · 1						

- 6 Press Tab to move to the Reminder column.
- 7 Do one of the following:
 - Type a reminder for this patient.
 - Click the Reminder column, click .
 select a reminder from the list, then click OK.
- 8 Click 🔚 , then close the window.

Once the patient reminder is added, the reminder pops up whenever you open a patient-related window for the patient, such as the treatment plan.

Treatment	nt Plan for John Vi								
File Edit Vie	w Reports Documer	nts Tools DAIS)	r Help						
DAISY	Schedule	Account	Patient	Recall Mgr	Transactions	Claim Hist	Reports	Practice Config	List Ma
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Patient	John Vineyard		-	_)	Provider S	mith DDS, R	ichard 💉	/
Description					9	🗹 Inc	lude in Appt	Route Slips	
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* 🖻 🍤 😂 🕯	₽				Fee Total: \$0	0.00			

To dismiss the reminder for the rest of the day, check this check box, then click OK. The setting is user specific per workstation

Note. Patient reminders are included in the Patient Profile report.

Delete a Patient Reminder

- To delete a reminder for a patient:
 - **1** From the DAISY toolbar, click 🗧 .
 - 2 Search for and select the patient, then click OK.
 - 3 In the Patient window, click the Reminders/Tags tab.
 - 4 In the Reminders section, select the reminder to delete, then click **a**.
 - 5 In the Confirm dialog box, click Yes.





Add an Account Reminder

Users can add, edit or delete account reminders from a new Reminders tab in the Account window. Each reminder is limited to 60 characters, including spaces.

- To add a reminder to an account:
 - From the DAISY toolbar, click 🧱 . 1
 - Search for and select the account, then click OK. 2
 - 3 In the Account window, click the Reminders tab.
 - In the Reminders section, click 🐢. 4

	O Account - 13627	
	Eile Edit View Reports Documents Iools DAISY Help	
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	🥰 Account 🐸 🗔 🗅 2 😂 🗊 🖬 罪 🐉 🎕 🐁 🗞 🗔 🗊 💭	
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	E-Mail:	
	Ins Co ID Insurance Company Insurance Plan Name Subscriber Subscriber ID Group	#
	1797 AETNA United Parcel Service, In John Vineyard W077245288 60749)
		>
Click here to start	Financial Mto General Patients Financial Arrangement Statements Reminders	
adding a reminder	Reminders 👍 🚍	
	Date Reminder	
	▶ 6/11/2011 Confirm insurance group and subscriber ID numbers	
Click here to select		
a reminder from a list of canned reminders		
	Added by: Administra 11/27/2001 12:00 AM Edited By: DBA 08/23/2010 03:45 PM	

5 In the Reminder column, do one of the following:

- Type a reminder for this account.
- Click *m* and select canned text for the reminder.
- 6 Click 🔚 , then close the window.

Once the account reminder is added, the reminder pops up whenever you open:

- An account-related window for the account, such as the Account or Ledger window.
- A patient-related window, such as Treatment Plan, for the account's guarantor or any patient on the account.

In the following example, Rhonda Vineyard's account has a reminder. Her account includes her husband, John Vineyard. When John's patient window is opened, both his patient reminder and Rhonda's account reminder show in his Reminder pop-up window.

	🕕 Patient - John Vineyard	
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	Image: Schedule Image: Sch	ctice Config
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	Patient Inactive Phones Ext. Type Photo Photo John Vineyard 1624 E Holly Dr (503) 212-5613 Home 1600 1600 1600 Portland, OR 97220 97220 (503) 315-1719 Work 1	Į
	Birthdate: 05/08/1949 Age: 62 Gender: M SSN:	
	E-Mail: Reminder Accounts Patient John Vineyard 13627 D6/11/2011 Do not lay patient too far back	
Patient reminders	Account #13627 06/11/2011 Confirm insurance group and subscriber ID numbers	
	Reminders Don't show me this again today. Date OK	
To dismiss the reminder – for the rest of the day, check this check box.	Ub/11/2011 Vo not lay patient too far back	>
then click OK. The setting is user specific	Added by: Administra 03/22/2005 08:58 AM Edited By: BETTY 06/11/2011 11:35 AM	

per workstation



In the Reminder pop-up window, patient reminders are listed first. If the patient or account has more than one reminder, the reminders are listed in date order.



Delete an Account Reminder

- To delete a reminder for an account:
- 1 From the DAISY toolbar, click 🏼 👹 .
- 2 Search for and select the account, then click OK.
- 3 In the Account window, click the Reminders tab.
- 4 In the Reminders section, select the reminder to delete, then click 🔲 .
- 5 In the Confirm dialog box, click Yes.

CHAPTER 3 Online Eligibility Inquiries

Online eligibility inquiries through Emdeon are available via the Request Benefit Information icon (
) on the Quick Access toolbar from the following DAISY windows:

- Account
- Patient
- Schedule
- Appointment Detail
- Treatment Plan
- Insurance Coverage

The Request Benefit Information icon is active only if the company that provides the patient's insurance coverage participates in Emdeon's electronic eligibility inquiry program, otherwise the icon is grayed out.

Inquiry requests are sent via the Internet and are processed within approximately six seconds.

Note. The format of eligibility information may be different for each insurance company.

When the first patient on the day's appointment schedule is checked for benefits, DAISY automatically checks all the other patients with appointments scheduled that day who are eligible for online benefit checking. DAISY caches the results for seven days. Caching of eligibility information enhances the performance of online inquiries.

The cache is emptied for a specific patient after the seven-day period or if any of the following events occur:

- The subscriber ID for the coverage changes.
- The insurance company on the plan changes.
- The insurance is removed or deleted from the patient record.
- The group number is changed.
- Participating provider information is changed on the plan.



Here is an example of an eligibility inquiry initiated from the Patient window.

- To make an online eligibility inquiry from the Patient window:
 - 1 From the DAISY toolbar, click 🗧 .
 - 2 Search for and select the patient, then click OK.
 - 3 In the Patient window, click 📘.



Your default web browser opens and the inquiry begins. You see the results in the browser window.

Benefits as of 03/31	/2011 - Windows Interr	net Explorer		
💽 🗢 🙋 C: \Docu	ments and Settings\Administra	ator\Local 🔽 🐓 🗙	🚼 Google	
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Favorites 🏾 🌈 Benefit	ts as of 03/31/2011			
Payer				
Payer Name UN	NITED CONCORDIA	Transaction ID	70041535	
Provider				
Provider RI	ICHARD M SMITH			
Address				
Provider ID 12	234567893	Tax ID		
Subscriber				
Insured Name GL	LORIA CHAVEZ			
Member ID NO	01204432	SSN		
Group Number		Group Name		
Date of Birth		Gender		
Dependent				
Patient Name GI	LORIA CHAVEZ			
Relationship Se	elf	SSN		
Group Number		Group Name		
Date of Birth 07	7/12/1967	Gender	Female	
Coverage Type				
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pental Care: Family, Ad 5P 883881000 ITPON	uve coverage, indemnity			
Coverage Dates				
aductibles & Ma	vinums			
University				N
JIKHOWA				None
Maximum				
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overage				
Description				
NESTHESIA SERVICES				100%
ASSISTANT SURGERY SE	RVICES			0%

The format of eligibility information may be different for each insurance company In DAISY windows that have multiple patients listed, such as the Account or Insurance Coverage, select the patient to check his or her eligibility

Here is an example of an eligibility inquiry that is initiated from the Account window. The guarantor is Rhonda Vineyard and the inquiry is for John Vineyard.

• To make an online eligibility inquiry from the Account window:

- 1 From the DAISY toolbar, click 🥳 .
- 2 Search for and select the account, then click OK.
- 3 In the Account window, select the patient, then click 🔯 .

File Edit View Reports Documen	its Tools DAISY	Y Help					
CAISY C Schedule	Account	Patient	Recall Mgr	Transad	tions Cla	im Hist	Reports
🥰 Account 🛛 😂 🗔	🗅 🎜 😂	🖪 🔒 🖡	I 🔓 🎕 🖡		🗟 🗊 🔛	R	
Guarantor 1 Rhonda Vineyard 1624 E Holly Dr Portland, OR 97220	lnactive	Phones (503) 212-5 (503) 315-1	Ext. 5613 1719 Mrs	Type Home Work			
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Your default web browser opens and the inquiry begins. You see the results in the browser window.

Note. If you are interested in subscribing to this service, contact DAISY Sales at 503.765.3471 or daisysales@dmcdental.com.

When multiple patients are listed, select the patient whose benefits need to be checked



CHAPTER 4 Other Enhancements

Modify the Order of Ledger Entries

In the Ledger window, entries can now be sorted either by ascending (oldest to newest transaction) or descending order. Descending order is the default setting.

- To sort the Ledger by ascending order:
 - **1** From the DAISY menu, select Account, then select Ledger.
 - 2 Search for and select the account, then click OK.
 - 3 From the View menu, select Sort Ascending.

When this menu option is set to ascending order, the window automatically scrolls to the bottom of the transactions list to keep the focus on the latest entry.

Ledger for Account #10351			
File Edit View Reports Documents Tools DAISY He	þ		
Transactions Ctrl+T Ctrl+T Ctrl+H Related Claim	ient Recall Mgr Transact	ctions Claim Hist Rep	ports Practice Config
Filter Ledger	🖗 🗿 🛒 🚰 💭 🖼 🖻		
Accoun Show only charges waiting for insurance Fee Sch Hide Reversals	:: Adamson, Lawrence :: Smith DDS, Richard M	Show only charg	es waiting for insurance
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Post 2 Refresh F5	scription Th. Srf	f./Qd Amount CR	Balance ervice Date 📩
2/23/2009 2/18/2009 Marilyn Adam D0274* Bi	tewings-4 Films	\$68.00	\$211.00
3/2/2009 3/2/2009 Lawrence Ad D1110* Pr	rophylaxis, Adult	\$91.00	\$302.00
3/2/2009 3/2/2009 Lawrence Ada D0274* Bi	tewings-4 Films	\$68.00	\$370.00
3/2/2009 3/2/2009 Lawrence Ada D0120* Pe	er oral eval- estbl pat	\$52.00	\$422.00
3/16/2009 3/16/2009 Marilyn Adam Payment R	EGENCE BC/BS OF OI	\$211.00 CR	\$211.00 2/18/
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Color Key 🔲 Reversal 📃 Charge 📕 Pa	yment 🔲 Adjustment 🔳	Rebill Fee or Finance Ch	arge
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Note. The Sort Ascending menu option is user specific per workstation.

Clear Responses from Clinical Details Forms

Users can now clear responses from a drop-down list or radio button group in a clinical details form or when filling out a Details template.

Note. Cleared responses in a saved clinical details form are added to the form's revision history.

In the following example, Cynthia Harris is filling out a recall form for the patient Lucas Amerson. She incorrectly selected an option in the Periapical X-ray field and needs to clear it. She also needs to clear the selection under Fluoride.

- To clear a response from a Details template:
 - **1** From the DAISY toolbar, click
 - 2 Search for and select the patient.
 - **3** Click the Add Note button.
 - 4 In the Search For Patient Details window, search for and select the appropriate template.
 - 5 Enter clinical information in the template.
 - 6 Do one of the following:
 - To clear a response in a drop-down list, right-click on the drop-down list and select Clear Response.

🔘 Recall - Patient Lucas Amerson	
File Edit View Reports Tools DAISY Help	
Schedule Account Patient Recail Mgr Transactions	Claim Hist Reports Practice Config List Maint Procedures
🕦 Recall 🗃 🗅 🎜 🕹	
Patient Lucas Amerson Entry Date 06/14/201	1 🔽 📴 Set Color
 ∠ Status	
🤧 📙 🛷 Ready for Review E	By DMCHELP
Recall	
Hygiene Provider Harris RDH, Cynthia 💌	TX Completed Today:
Exam Provider Smith DDS, Richard M 👻	Exam Type Periodic 👻
	Cleaning Type Adult Prophy
	Periapical X-ray 2
Pt Concerns none	Bitewing X-ray 4 BW Clear Response
Oral Cancer Screen 🛛 Within normal limits 👻 🛛 Oral Hygiene 🛛 Good 🔍	Other X-ray
Oral Condition	Fluoride
Stain Bleeding Calculus Supra Calculus Sub Plaque	◯ Varnish ◯ Child ⊙ Adult
Location Localized V Generalizer V V Localized V	Periodontal Probe Yes
Severity Light 🗸 Light 🔽 🔽 Light 🔽	Other Treatment
Post-op BP Recall Recommendations 6 Months	
Oral Hvaiene Instructions	Treatment Notes:
Brush 2x daily, floss daily	



• To clear a response from a radio button group, right-click in the group and select Clear Response.

Recall - Patient Lucas Amerson	
File Edit View Reports Tools DAISY Help	
Schedule Account Patient Recall Mgr Transactions	Claim Hist Reports Practice Config List Maint Procedures
🕦 Recall 🖉 🖬 🗅 🎜 😂	
Patient Lucas Amerson Entry Date 06/14/2011	1 🔽 📴 Set Color
Status	
😼 🛄 🏑 Ready for Review E	By DMCHELP
Recall	
Hygiene Provider Harris RDH, Cynthia 💌	TX Completed Today:
Exam Provider Smith DDS, Richard M 💌	Exam Type Periodic 👻
	Cleaning Type Adult Prophy
	Periapical X-ray
Pt Concerns none	Bitewing X-ray 4 BW
Oral Cancer Screen Within normal limits 👻 Oral Hygiene Good 👻	Other X-ray
Oral Condition	Fluoride
Stain Bleeding Calculus Supra Calculus Sub Plaque	○ Varnish ○ Child
Location Localized V Generalizer V V Localized V	Periodontal Probe Yes
Severity Light V Light V Light V	Other Treatment
Post-op BP Recall Recommendations 6 Months 💌	
Oral Hygiene Instructions	Treatment Notes:
Brush 2x daily, floss daily	

7 Make any additional changes, then click 🔚 and close the window.

Note. To clear a response in a clinical details form, right-click on the drop-down list or in the radio button group and select Clear Response.

Generate a Referring Provider Envelope

A new Mail Merge template enables you to create a #10 business envelope addressed to a referring provider.

- To generate an envelope for a referring provider:
 - 1 From the DAISY menu, select Configure, then select List Maintenance.
 - 2 Click the Referring Providers tab.
 - **3 Do one of the following:**
 - To select a referring provider, click *for* Referring Provider window, and select the provider.
 - To add a new referring provider, click and type the name and address of the referring provider, then click .
 - 4 From the Reports menu, select Merge Docs, then select Referring Provider Envelope.

🛽 Lookup List Maintenance - Referring Providers								
File Edit View	Reports Tools	DAISY Help	7					
DAISY	Referring Provider Listing Referring Provider Labels Referring Provider 1-Up		Defe	Patient	Recall Mgr	Transactions	Claim Hist	Re
Lookup L	Print Window							
Simple Lists	Printer Setup		viders	Cities				
Referring Providers								
Prefix First	Middle			Last		Suffix		
William	William			Tolbert		DMD		
Care Of								
Street 3307 SE Taylor Ave.								
City Por	City Portland							
State OR	Zip 97212	- 0993						
Phone		Ext.						
Fax		Ext.						
E-Mail								
Website								
NPI								

- 5 In the Print Options window, do one of the following:
 - Click Preview to preview the envelope in Microsoft Word.
 - Click Print to print the envelope.





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