

Eaglesoft, a Patterson Technology

# New Features Guide

Eaglesoft 21.00



## New Features Guide

Welcome to **Eaglesoft** version 21. The following guide will introduce and breakdown all the enhancements and features included in this new version.

# End of Period Processing

## Scheduled End of Period Processing

The **End of Period** process has been improved to include pre-scheduling features.

**Note: Eaglesoft is not supported for use on a virtual machine. During limited testing, inconsistencies have been found running Scheduled End of Period processing on a virtual server. It is recommended to run the End of Period processes manually if using a virtual server.**

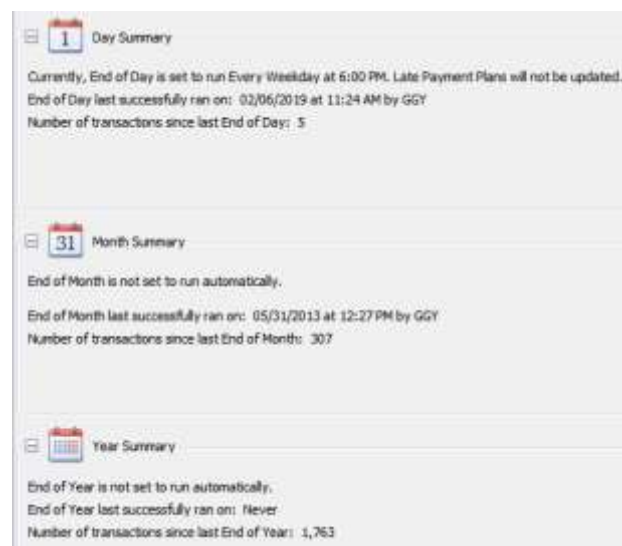


To begin:

End of Period processing options can be accessed in **Activities | Process End of Period**.

or

Toolbar options for **EOD** and **EOM** can also be used to open the **End of Period** window.



On the **Summary** tab, view details such as:

- **End of Period** schedule information
- Previous **End of Period** process date
- The number of transactions since the last time the **End of Day**, **End of Month** and **End of Year** were completed.

1. From the **Process End of Period** window, select the **Settings** tab on the left.
2. Under **User Settings**, choose your desired **Primary** and **Secondary Users** and **Alert** warning time.

This provides the designated staff members with an alert prior to beginning the scheduled **End of Period** process.

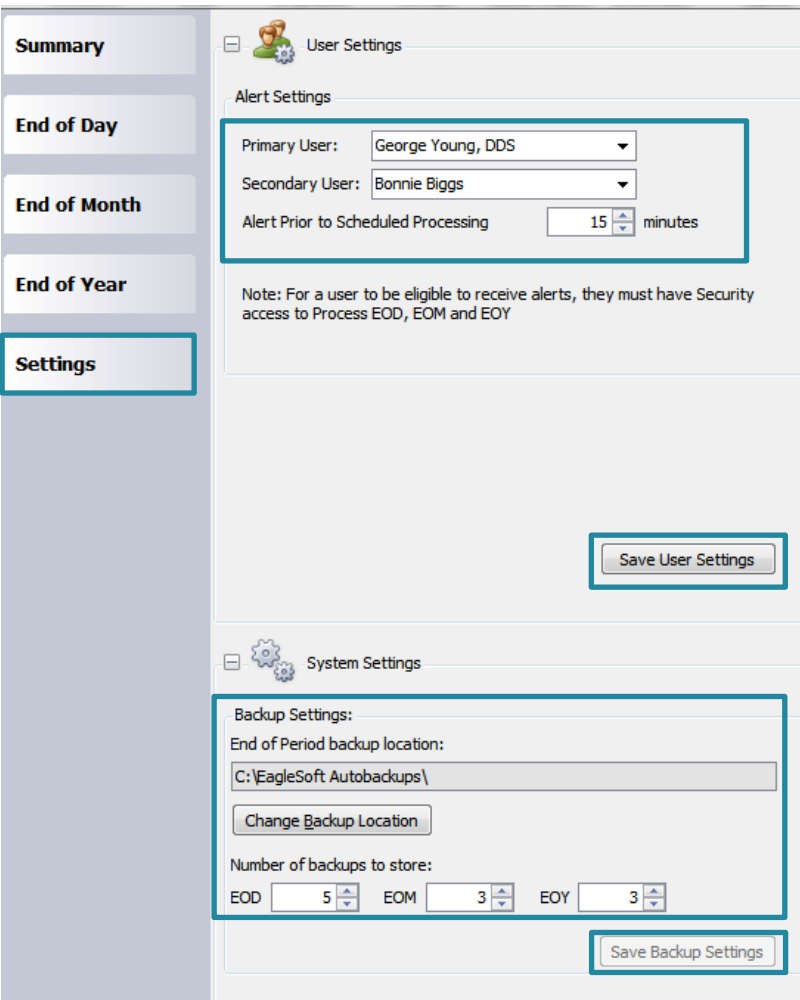
*Note: The **Primary User** must be designated to be able to use **Scheduled End of Period Processing**.*

3. Select **Save User Settings**.

4. Under **System Settings**, enter your desired backup location and determine the number of backups to keep.

*Note: A minimum of one backup for each is required. The Backup Location can only be changed from the server.*

5. Select **Save Backup Settings**.

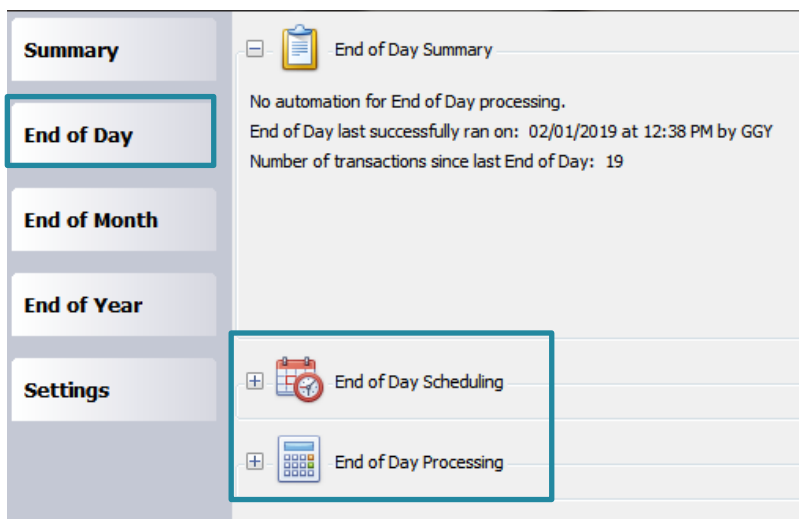


**NOTE:** In order for a scheduled End of Period to properly run, please set the **Windows Power Options** on the **EagleSoft** Server to **Never Put The Computer to Sleep**. Instructions on how to change the Windows Power Options are in [FAQ 13738](#).

**Dual Database Users:** When setting up a Scheduled End of Period, please make sure the Primary and Secondary database scheduled times are at least 5 minutes apart. This is to ensure that the Primary database Auto Backup is complete prior to the start of the Secondary Database Auto Backup.

## End of Day

Expand the desired section by selecting the + sign or double-clicking on the icon or section name.



**End of Day Summary:** View a summary of information around the **End of Day Process** including if and when **End of Day** is scheduled to run, when **End of Day** was last successfully processed and the number of transactions in the system since the last **End of Day**.

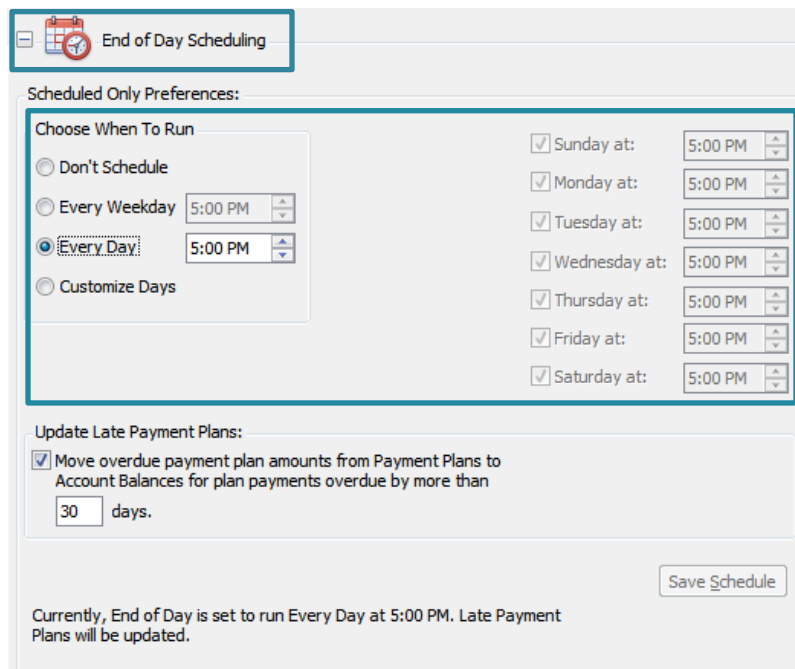
**End of Day Scheduling:** Controls the scheduled **End of Day** processing.

**End of Day** reports will not be printed or saved to the **Practice SmartDoc** during scheduled processing. **End of Day** reports can be found in the **Reports** listing.

Scheduled **End of Day** processing will process all transactions available in the system when the scheduled time arrives.

*Note: As with a normal **End of Day**, at least one transaction must have been processed since the last **End of Day** in order for the scheduled **End of Day** to process.*

## End of Day Scheduling



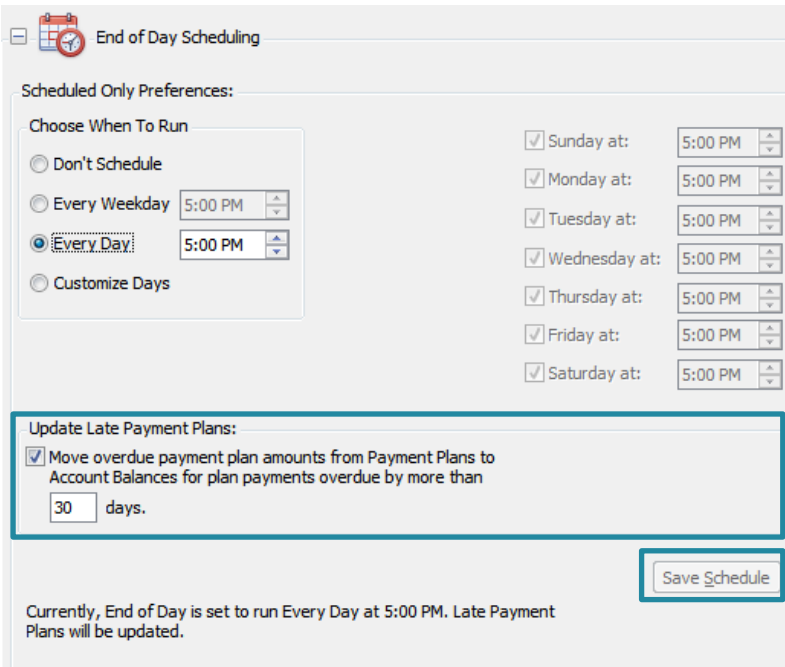
**In the Scheduled Only Preference area:**

**Don't Schedule** disables the scheduled **End of Day** processing.

**Every Weekday** allows the scheduled **End of Day** processing to be set for a specified time every weekday, i.e. Monday – Friday 5:00PM.

**Every Day** allows the scheduled **End of Day** processing to be set for a specified time every day of the week.

**Customize Days** allows the **End of Day** to be processed on specified days and times of the week.



**Update Late Payment Plans** allows the **End of Day** processing to move overdue payment plan amounts from the **Payment Plans** to **Account Balances** for the plan payments overdue by a specified number of days.

Once the **Preferences** have been set, select the **Save Schedule** button to save this schedule.

The information below the **Save Schedule** button will then update to display the currently set schedule information.

This information will also be updated in the **End of Day Summary** section on this page as well as on the **Summary** tab in the **End of Period** window.

**As always, all accounting work should be completed prior to End of Day processing.**

For a scheduled **End of Day** to process, the database engine **must** be running. If the database is not running at the desired time for a scheduled **End of Day**, nothing will be processed. If the Server machine is asleep or powered off at the scheduled time, the scheduled **End of Day** will not process.

## End of Day Processing



To process the **End of Day** manually, open the **End of Day Processing** section.

**Run Manually** will open the **Process End-of-Day** window.

**Process End-of-Day**

End of Day  
Description: Feb 12, 19  
Transactions Since Last End of Day: 5  
Last EOD Processed On: 2/6/19 @ 11:24 AM  
Choose The Last Transaction To Include:  
2/12/2019 Janis Abbott - Service for \$111.00  
☐ Use Specified Date Range For Printing:  
From: 00/00/0000 To: 00/00/0000  
☐ Save Indicators to File

Special Processing:  
☒ Apply unassigned credits to unpaid debits  
☒ Update Late Payment Plans  
Move Late Payment amount from Payment Plans to Account  
Balances that are overdue by more than 30 days.

Print End of Day Reports:

<input checked="" type="checkbox"/> Deposit Slip	<input checked="" type="checkbox"/> Provider Productivity	<input checked="" type="checkbox"/> Collections Reconciliation
<input type="checkbox"/> Secondary Deposit Slip	<input checked="" type="checkbox"/> Day Sheet	<input checked="" type="checkbox"/> Production Reconciliation
<input type="checkbox"/> Deposit w Itemized Cash	<input type="checkbox"/> Scheduler Audit Trail	<input checked="" type="checkbox"/> Adjustment Reconciliation
<input type="checkbox"/> Audit Trail	<input type="checkbox"/> Prescriptions	<input type="checkbox"/> Deleted Transactions
<input type="checkbox"/> Practice Audit Trail Analysis	<input type="checkbox"/> Post Op Calls	<input type="checkbox"/> Appts Without Walkouts
<input type="checkbox"/> Unassigned Credits	<input type="checkbox"/> Unpaid Services	<input type="checkbox"/> Credit Dist. Audit Trail

This process is the same as in prior versions of **Eaglesoft**.

## End of Month

Expand the desired section by selecting the + sign or double-clicking on the icon or section name.

**Summary**

**End of Day**

**End of Month**

**End of Year**

**Settings**

End of Month Summary  
End of Month is not set to run automatically.  
End of Month last successfully ran on: 05/31/2013 at 12:27 PM by GGY  
Number of transactions since last End of Month: 307

End of Month Scheduling

End of Month Processing

**End of Month Summary:** View a summary of information around the **End of Month** Process including:

- If and when **End of Month** is scheduled to process
- When **End of Month** was last successfully processed
- The number of transactions in the system since the last **End of Month**.

**End of Month Scheduling:** This section controls the scheduled **End of Month** processing.

All **End of Month** reports will automatically save to the **Practice SmartDoc** when the scheduled **End of Month** is processed.



Scheduled **End of Month** processing will not print reports.

Scheduled **End of Month** will process all **End of Days** that are in the system when the scheduled time is reached.

*Note: As with a normal **End of Month**, at least one **End of Day** must have been processed since the last **End of Month** in order for the scheduled **End of Month** to process.*

## End of Month Scheduling

**Don't Schedule** disables the scheduled **End of Month** processing.

**On the X day of the month** allows the scheduled **End of Month** processing to be set for a specified day of the month, e.g. every 31<sup>st</sup> of each month.

*If the month has fewer days than selected, the **End of Month** will be processed on the last day of the month, such as the 28<sup>th</sup> of February or 30<sup>th</sup> of April.*

**On the X day of the week** allows the **End of Month** to be processed on the specified day of the week. (For example: 4<sup>th</sup> Friday of each month.)

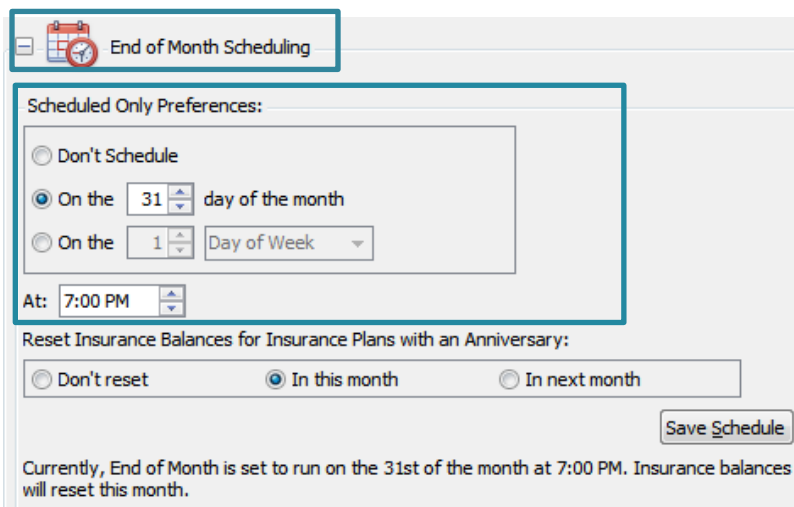
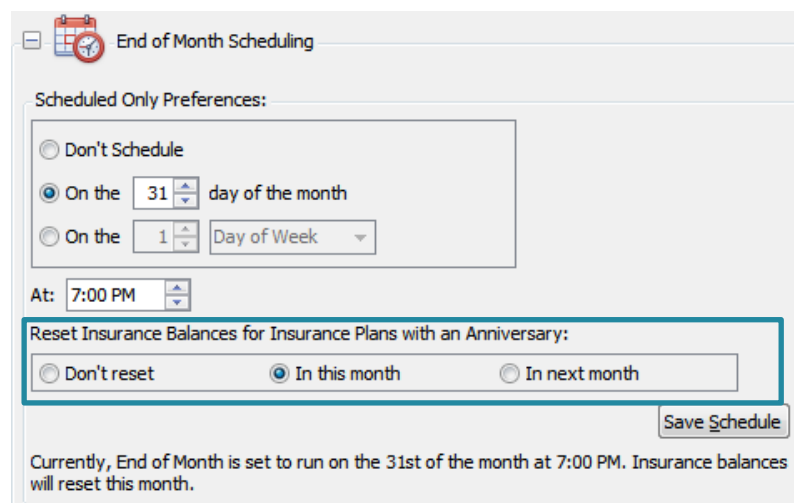
**At** designates the desired **End of Month** processing time.

**Don't reset** disables **Reset Insurance Balances for Insurance Plans** in the scheduled **End of Month** process.

**In this month** allows the **Insurance Balances for Insurance Plans** in the current month to be reset in the scheduled **End of Month** process.

*For example, if you are processing your scheduled **End of Month** on January 31<sup>st</sup> and you want to reset insurance balances for those with a beginning month of January, select **In This Month**.*

**In next month** allows the **Insurance Balances for Insurance Plans** in the upcoming month to

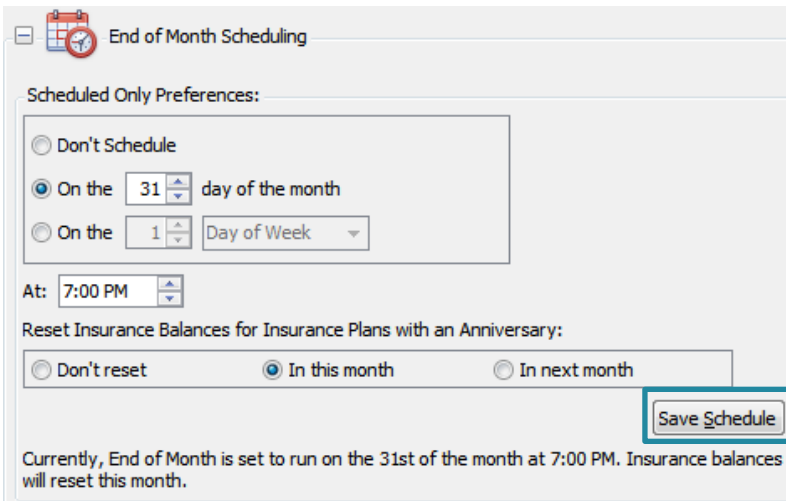
be reset in the scheduled **End of Month** process.

*For example, if you are running your scheduled **End of Month** on January 31<sup>st</sup> and you want to reset insurance balances for those with a beginning month of February, select **In Next Month**.*

Once the preferences have been set, select the **Save Schedule** button to save this schedule.

The information below the **Save Schedule** button will then update to display the currently set schedule information.

This information will also be updated in the **End of Month Summary** section on this page as well as on the **Summary** tab in the **End of Period** window.




**As always, all accounting work should be completed prior to End of Month running.**

For a scheduled **End of Month** to process, the database engine **must** be running. If the database is not running at the desired time for a scheduled **End of Month**, nothing will be processed. If the Server machine is asleep or powered off at the scheduled time, the scheduled **End of Month** will not process.

## End of Month Processing




End of Month Processing

Manual Only Preferences:  
Description:   
Choose the Last EOD to Include:  
  
☒ Reset Insurance Balances for Insurance Plans with an Anniversary Month between:  
 and   
Reports to Print Manually:  
☒ Accounts Receivable Report    ☒ Day Sheet  
☒ Coverage Production    ☒ Provider Productivity  
☒ Referral Productivity - Detailed  
\* Please Note:  
Please select the boxes for reports you would like to print. All listed reports will be placed in your Practice SmartDoc regardless of which boxes are selected to print.  

Set Printer
Run Manually

**End of Month Processing:** This section allows for manual processing of the **End of Month**.

Select the report(s) to print. **Note:** All **End of Month** reports will automatically save to the **Practice SmartDoc** when the **End of Month** is processed regardless of if they are selected to print.

**Set Printer** to change the printer designated to print reports.


**Run Manually** will run the **End of Month** process.



This process is the same as in prior versions of **Eaglesoft**.

## End of Year

Expand the desired section by selecting the + sign or double clicking on the icon or section name

Summary  
End of Day  
End of Month  
End of Year  
Settings


End of Year Summary  
Currently, End of Year is not set to run automatically.  
End of Year last successfully ran on: Never  
Number of transactions since last End of Year: 2,072


End of Year Scheduling  

End of Year Processing

**End of Year Summary:** This section displays a summary of information around the **End of Year** Process including:

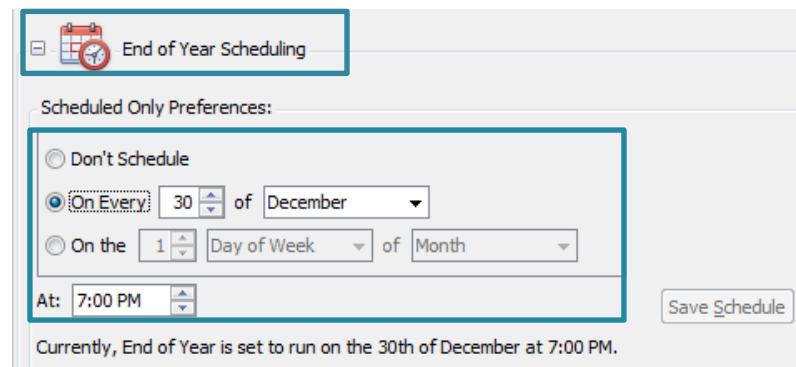
- If and when **End of Year** is scheduled to process
- When **End of Year** was last successfully processed
- The number of transactions in the system since the last **End of Year**.

**End of Year Scheduling:** This section controls the scheduled **End of Year** processing. All **End of Year** reports will automatically save to the **Practice SmartDoc** when the scheduled **End of Year** is processed. Scheduled **End of Year** processing will not print reports.

Scheduled **End of Year** will process all **End of Months** that are in the system when the scheduled time is reached.

*Note: As with a normal **End of Year**, at least one **End of Month** must have been processed since the last **End of Year** in order for the scheduled **End of Year** to process.*

## End of Year Scheduling



End of Year Scheduling

Scheduled Only Preferences:

☐ Don't Schedule

☒ On Every 30 of December

☐ On the 1 Day of Week of Month

At: 7:00 PM

Save Schedule

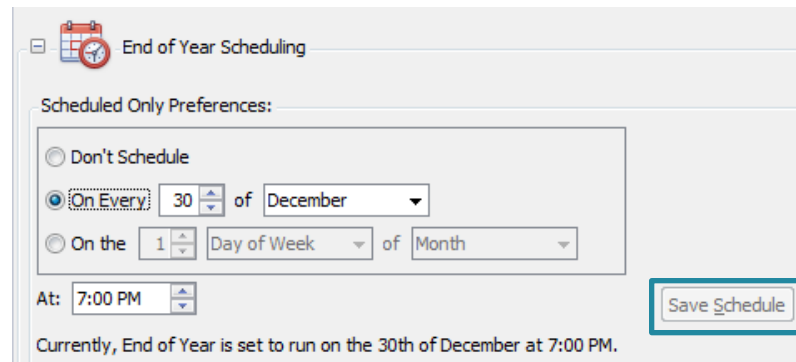
Currently, End of Year is set to run on the 30th of December at 7:00 PM.

**Don't Schedule** disables the scheduled **End of Year** processing.

**On Every** allows the scheduled **End of Year** processing to be set for a specified date and month. (For example: every 30<sup>th</sup> of December.)

**On the** allows the **End of Year** to be processed on a specified day of a specified month. (For example: the 4<sup>th</sup> Friday of December.)

**At** sets the time that the **End of Year** processing will process.



End of Year Scheduling

Scheduled Only Preferences:

☐ Don't Schedule

☒ On Every 30 of December

☐ On the 1 Day of Week of Month

At: 7:00 PM

Save Schedule

Currently, End of Year is set to run on the 30th of December at 7:00 PM.

Once the preferences have been set, select the **Save Schedule** button to save this schedule.

The information below the time setting will then update to display the currently set schedule information.

This information will also be updated in the **End of Year Summary** section on this page as well as on the **Summary** tab in the **End of Period** window.

**As always, all accounting work should be completed prior to End of Year running.**

For a scheduled **End of Year** to process, the database engine **must** be running. If the database is not running at the desired time for a scheduled **End of Year**, nothing will be processed. If the Server machine is asleep or powered off at the scheduled time, the scheduled **End of Year** will not process.

## End of Year Processing

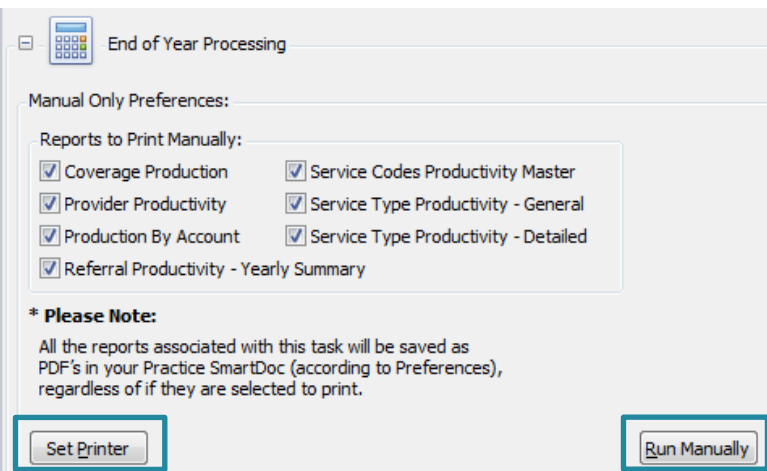
**End of Year Processing:** This section allows for manual processing of the **End of Year**.

Select the report(s) to print. **Note:** All **End of Year reports** will automatically save to the **Practice SmartDoc** when the **End of Year** is processed regardless of print status.

**Set Printer** to change the printer designated to print reports.

**Run Manually** will process the **End of Year**.

This process is the same as in prior versions of **Eaglesoft**.



End of Year Processing

Manual Only Preferences:

Reports to Print Manually:

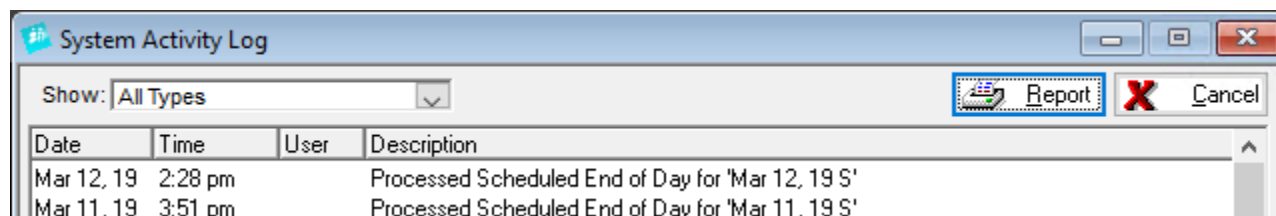
- ☒ Coverage Production
- ☒ Service Codes Productivity Master
- ☒ Provider Productivity
- ☒ Service Type Productivity - General
- ☒ Production By Account
- ☒ Service Type Productivity - Detailed
- ☒ Referral Productivity - Yearly Summary

**\* Please Note:**  
All the reports associated with this task will be saved as PDF's in your Practice SmartDoc (according to Preferences), regardless of if they are selected to print.

Set Printer Run Manually

## System Activity Log

As with previous versions of **Eaglesoft**, the **System Activity Log** (located in the **Utilities** menu) will document the success or failure of the **End of Period** process. **System Activity Log** entries for a Scheduled End of Period processing will end with an "S" to signify that it was a scheduled run.



Date	Time	User	Description
Mar 12, 19	2:28 pm		Processed Scheduled End of Day for 'Mar 12, 19 S'
Mar 11, 19	3:51 pm		Processed Scheduled End of Day for 'Mar 11, 19 S'

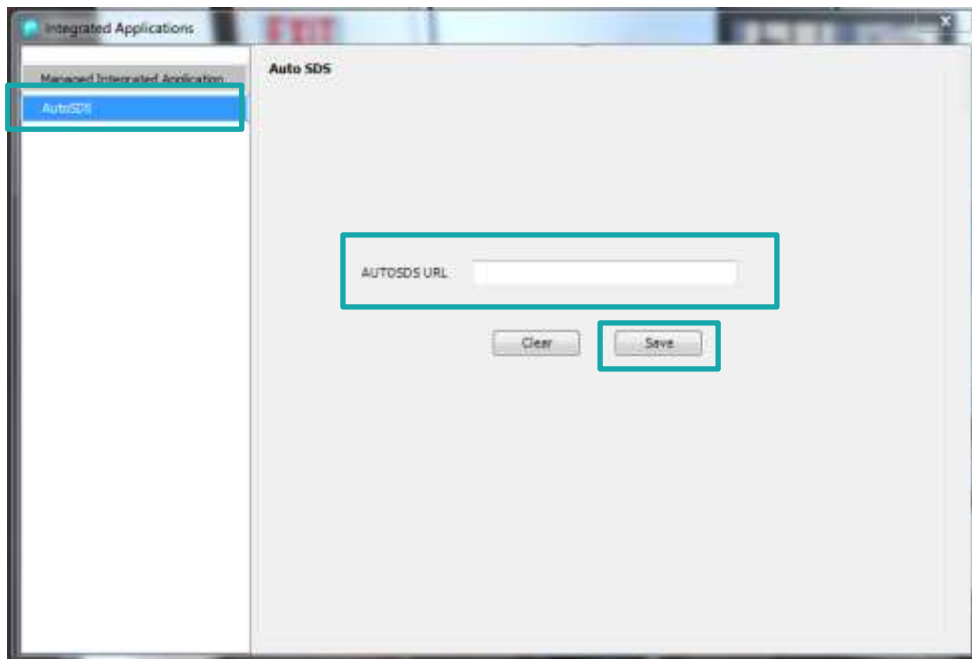
To verify that a scheduled **End of Period** has successfully processed, please check the **System Activity Log** after that scheduled process has completed.

## AutoSDS Integration

AutoSDS is a regulatory management system that keeps your Safety Data Sheet (SDS) requirements up to date and easily accessible.

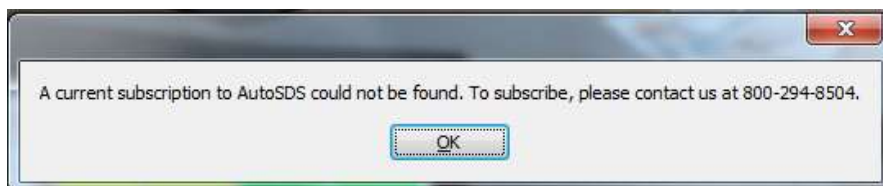
### Enabling AutoSDS

1. To enable the **AutoSDS** integration, select **Utilities | Managed Integrated Applications**.
2. In here, select the **AutoSDS** tab.
3. In the tab, enter your **AutoSDS URL** and select **Save**.



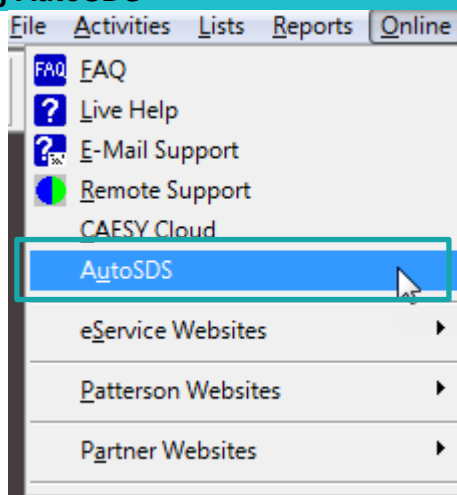
**Note:** The URL for your AutoSDS account is site specific. For nSite practices, each site will need to enter their site specific URL.

If you fail to enter your AutoSDS URL, the following message will appear when you attempt to access the program from Eaglesoft:

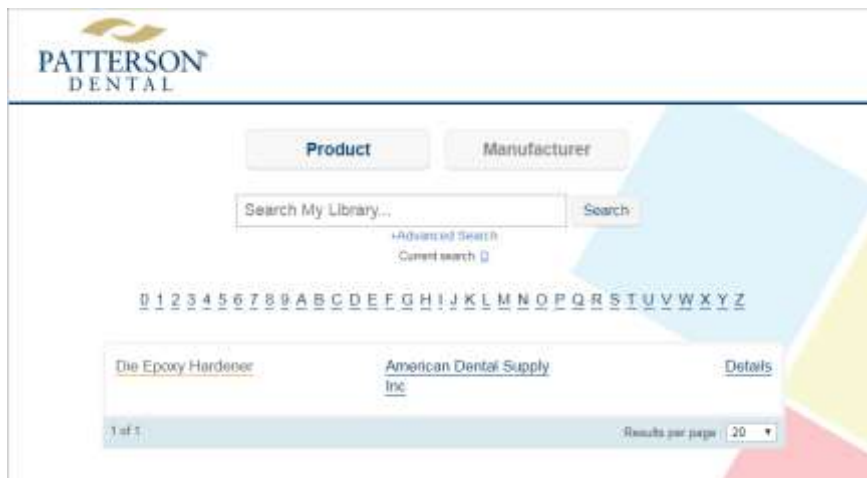


### Accessing AutoSDS

1. To access **AutoSDS**, select **Online | AutoSDS**.



2. **AutoSDS** opens in your default browser.



## AES-256 Encryption

### Encryption option

Our new encryption allows you to use an even more secure encryption method on your database. If you are interested in encrypting your database, Live Chat with a specialist by going to [www.pattfaq.com](http://www.pattfaq.com) and choosing Live Chat or click to [Chat Live Now!](#)



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