

How to Use Eaglesoft SmartDocs In Your Practice

SmartDoc is a document storage area that allows you to add, create, and save documents in Eaglesoft. Think of SmartDoc as an electronic filing cabinet. In an actual filing cabinet, we use folders. Within SmartDoc, the folders are called document groups. When information is scanned into SmartDoc, the team can put any information into the correct document group so that all the appropriate information will be easily retrievable rather than scrolling through the long list of recent documents. Documents in SmartDoc can be saved as Word documents, PDFs, Excel spreadsheets, PowerPoint presentations, or a JPG image.

Many practices only use SmartDoc for patient information. On the Practice Management home screen under File/Preferences, the SmartDoc preferences allow the office to create and save documents in a variety of areas beyond the patient. SmartDocs can be saved in the patient, the providers, the practice, insurance company, laboratory and referral recipient areas of Eaglesoft. Patient SmartDocs preferences include statements (saved in the responsible party's SmartDoc), letters, recall letters, walkout statements, medical histories, payment plan contracts (saved in the responsible party's SmartDoc), treatment plans, and informed consents if the practice so desires. End-of-period reports can be saved in the practice's SmartDoc under practice information. End-of-period SmartDocs can eliminate the practice's printing and storing of end of day, month or year reports. Quick reports can also be saved into the practice's SmartDoc. Insurance contracts, laboratory documents, and referral information can all be saved in their appropriate SmartDoc.

Any document that requires a signature can be saved in SmartDoc as a read-only file. Once a signature is obtained, the document cannot be edited or deleted. Any unsigned documents can be deleted by right-clicking on the document in recent documents and remove document. A document can also be renamed or put into a document group by right-clicking on the document in recent documents, choosing Document Information and adding a name or document group. You can even transfer documents from one patient to another, should a document be entered in SmartDoc in error, by also right-clicking on the document and choosing Transfer Document.

Document groups can be found under Lists and contain EOD/EOM/EOY, informed consent, insurance, medical history, patient identification, and many other groups. The office can create any other document groups that are specific to their needs. Documents can also be exported from or imported into SmartDoc. Many practices also use SmartDoc for image storage in addition to using Advanced Imaging.

In creating a SmartDoc, a letter or document can be created from an existing document or can be created using the letter merge types and fields. A letter merge field allows the practice to merge information into the document such as patient name, address, date, balance, etc. The letter merge type will determine where the letter can be accessed. For example, a letter merge of "patient letter" will only be available from the edit person window and the patient SmartDoc. To learn more about letter merges, visit [FAQ 20190](#).

Utilizing SmartDoc is a great way for the practice to keep track of documents including documents that patients can complete during their initial or continuing care appointments or what are uploaded from patient engagement programs such as RevenueWell, OperaDDS, or Solutionreach. As practices become chartless or paperless, utilizing SmartDocs is an essential component.