



New Feature Release Review

5/17/25

Today's New Feature Webinar – Topics We'll Cover:

- ◆ **Isotretinoin Therapy Module 2.0**
- ◆ **Resource Double Booking Setting**
- ◆ **Payment Allocation Report Updates** - Transaction Type, Item Filtering, Attending/Billing Report Columns
- ◆ **EZ Check In App Insurance Card & DL Upload**
- ◆ **Ability to Manually Type in Time on Schedule**
- ◆ **Patient DOB Added to Recall List**
- ◆ **Include ICD-10 Code on RX** - Toggle on Assessment
- ◆ **Deselect All Statuses on Schedule**

- ➔  *Now Available as Part of the Patient Communication Package Pro:*
 - ◆ **Multiple SMS Appointment Reminders**
 - ◆ **One-Way SMS Notifications to Patients** - Batch (past & future) and Individual (instant)

Please Note:

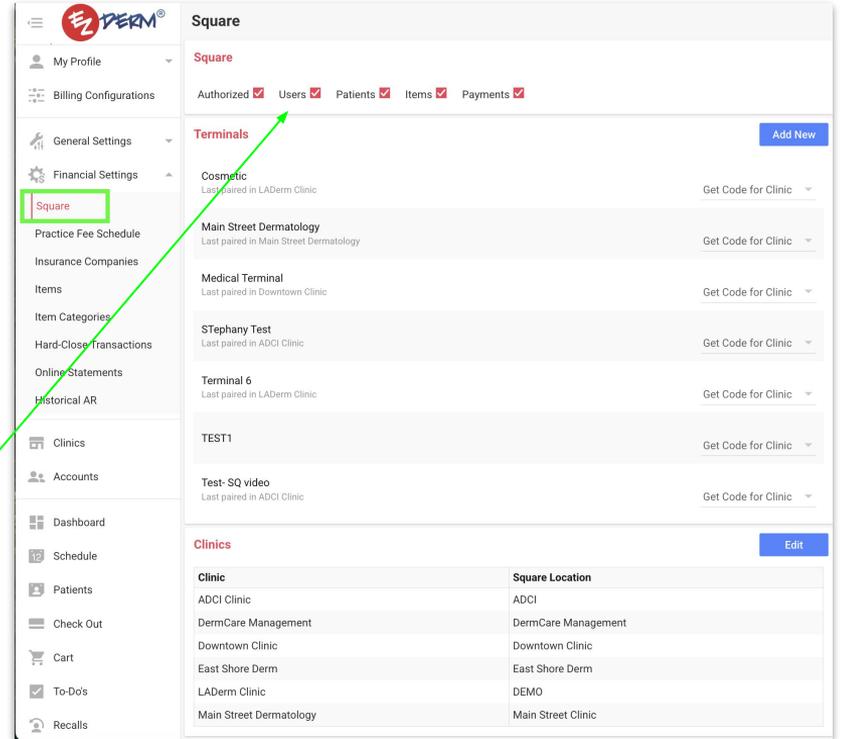
- This session will be recorded.
- You can ask questions via the question box and Erica is on standby to address live!

Important for EZPay (Square) Users

Due to a backend update that will allow us to build more advanced features with this integration in the future, after this update you will need to re-request the Square Token:

1. Admin user from PM go to Settings > Financial Settings > Square > Click Request Token
2. Re-sign to Square Account

At the top of this screen it will display a blue button that says “Request Token” > once you click and re-sign in will return to this screen.



The screenshot shows the EZDERM interface for Square integration. The left sidebar contains a menu with 'Square' highlighted. The main content area is titled 'Square' and includes a 'Request Token' button at the top right. Below this, there are sections for 'Authorized' (Users, Patients, Items, Payments), 'Terminals' (with an 'Add New' button), and 'Clinics' (with an 'Edit' button). The 'Terminals' section lists various terminals like 'Cosmetic', 'Main Street Dermatology', 'Medical Terminal', 'Stephany Test', 'Terminal 6', 'TEST1', and 'Test-SQ video'. The 'Clinics' section lists 'ADCI Clinic', 'DermCare Management', 'Downtown Clinic', 'East Shore Derm', 'LADerm Clinic', and 'Main Street Dermatology' with their corresponding 'Square Location'.

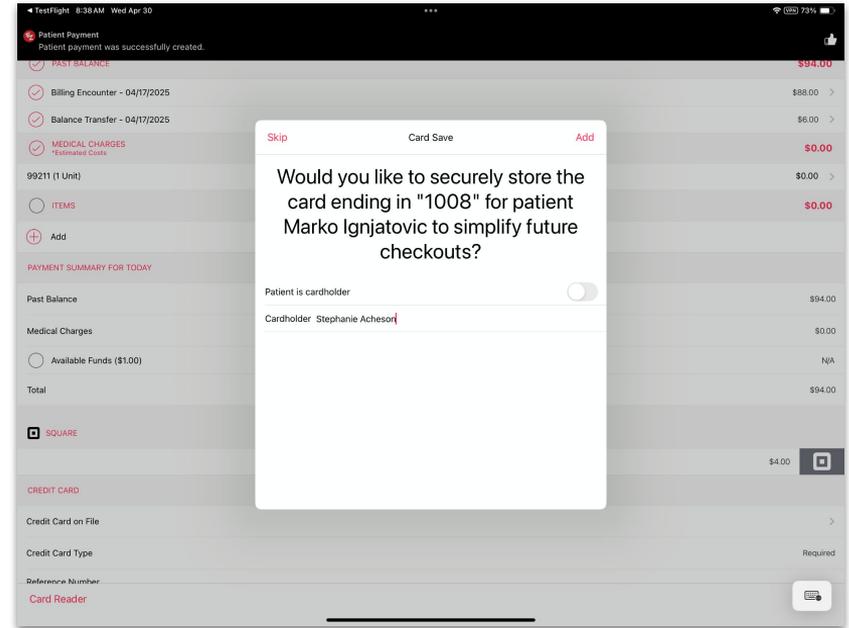
Clinic	Square Location
ADCI Clinic	ADCI
DermCare Management	DermCare Management
Downtown Clinic	Downtown Clinic
East Shore Derm	East Shore Derm
LADerm Clinic	DEMO
Main Street Dermatology	Main Street Clinic

Important for EZPay (Square) Users

If you are using **Square chip reader or stand**, you will also need to re-pair your device (Terminals will NOT be disconnected).

1. From checkout tab > click Card Reader in bottom left corner > Re-connect

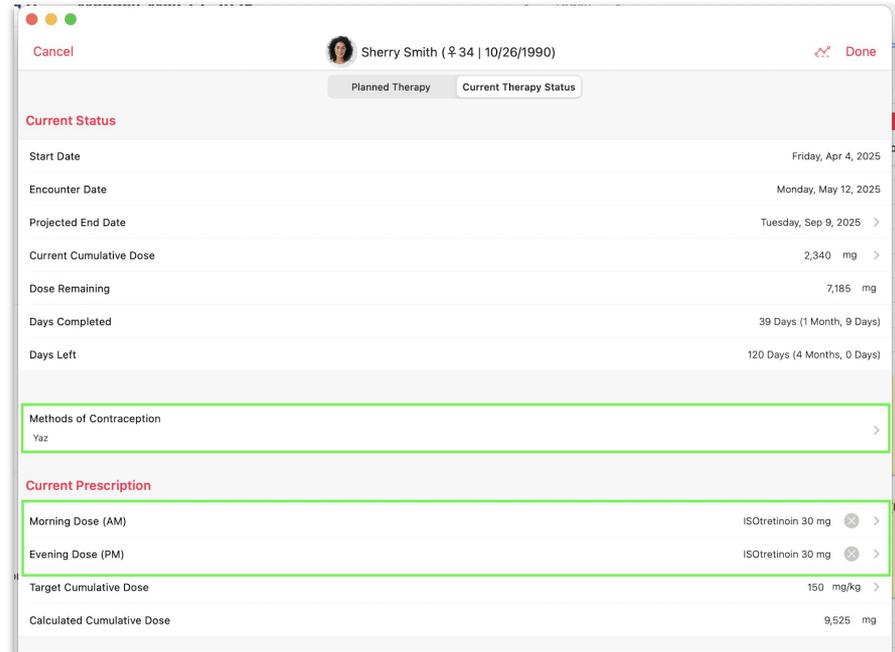
The workflow for saving the CCOF from the EHR has also changed. It is no longer accessible from the patient chart. **Instead, the option to save the CCOF will now appear as a pop-up after a payment has been processed.**



Isotretinoin Module Enhancements

Based on user requests, have made a few edits to the Isotretinoin module to help it be more effective:

1. NEW field to add contraception methods
2. Ability to edit dosage mid-therapy without restarting > automatically updates the projected end date and days left
 - a. Also available directly from the patient chart > Isotretinoin Calculator tab
3. Track all changes via the therapy calendar, also now shown under the A&P



The screenshot displays the Isotretinoin module interface for a patient named Sherry Smith (♀ 34 | 10/26/1990). The interface includes a 'Cancel' button at the top left and a 'Done' button at the top right. Below the patient information, there are two tabs: 'Planned Therapy' and 'Current Therapy Status', with the latter being selected. The 'Current Status' section lists various metrics:

Metric	Value
Start Date	Friday, Apr 4, 2025
Encounter Date	Monday, May 12, 2025
Projected End Date	Tuesday, Sep 9, 2025 >
Current Cumulative Dose	2,340 mg >
Dose Remaining	7,185 mg
Days Completed	39 Days (1 Month, 9 Days)
Days Left	120 Days (4 Months, 0 Days)

Below the 'Current Status' section, there is a 'Methods of Contraception' section with a dropdown menu showing 'Yaz'. The 'Current Prescription' section lists the following details:

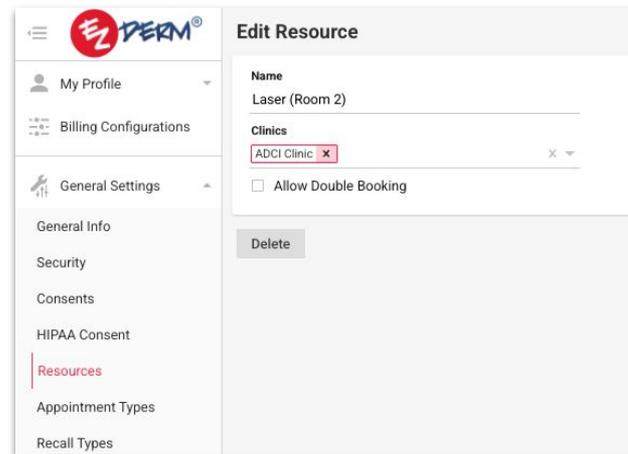
Prescription Detail	Value
Morning Dose (AM)	ISOTretinoin 30 mg ✕ >
Evening Dose (PM)	ISOTretinoin 30 mg ✕ >
Target Cumulative Dose	150 mg/kg >
Calculated Cumulative Dose	9,525 mg

Resource Double Booking Prevention Setting

If you have a resource that should **NOT** be double booked you now have the option to set this up so the front desk does not see the resource as available if it is already schedule for another appointment.

1. Navigate to **General Settings > Resources**
2. Click into the Resource Category > then specific Resource. Unselect the “Allow Double Booking” (this will be selected by default after the new release)

After making this change, if the resource is already scheduled at a specific time, it will not show as available in the Appointment Card drop down.



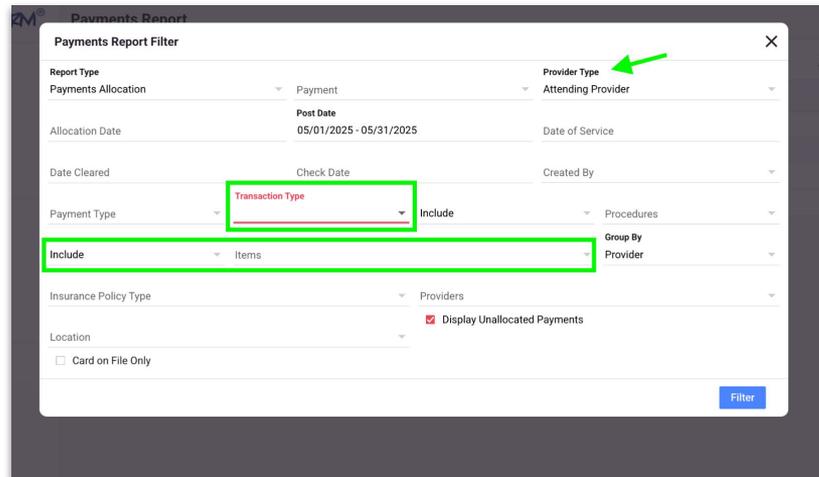
Payment Allocation Report Updates

To help more efficiently pay providers based on different compensation plans, we have added a few enhancements to the Payment Allocation Report filters (applies to both Reports and Custom Reports):

1. Under provider type “Attending Provider” > ability to filter payments by Transaction Type (Charges, Items, Balance Transfers, or All)
2. Ability to Include/Exclude Specific Items

+ Custom Reports Update:

New columns for **Attending Provider** and **Billing Provider** are now available—regardless of applied filters. This makes it easier to identify encounters involving different providers.

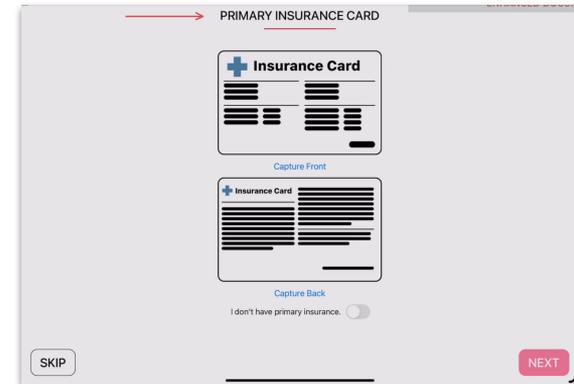
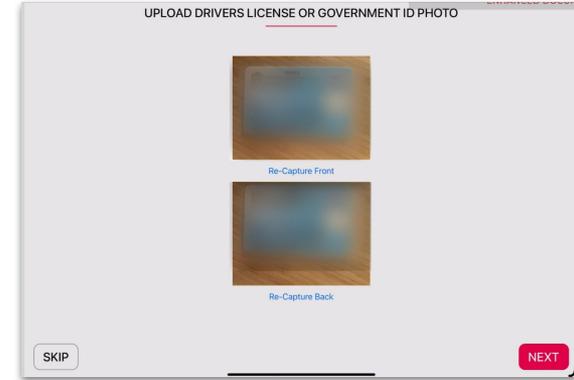


The screenshot shows the 'Payments Report Filter' dialog box. The 'Provider Type' dropdown is set to 'Attending Provider', indicated by a green arrow. The 'Transaction Type' dropdown is set to 'Include', and the 'Include' dropdown is set to 'Items', both highlighted with green boxes. The dialog also includes fields for 'Report Type', 'Payment', 'Post Date', 'Allocation Date', 'Date of Service', 'Date Cleared', 'Check Date', 'Created By', 'Payment Type', 'Procedures', 'Group By', 'Insurance Policy Type', 'Providers', 'Location', and 'Display Unallocated Payments'. A 'Filter' button is located at the bottom right.

EZ Check In App - Insurance Card & DL Upload

The patient now has the option to upload their Driver's License and Insurance Card from the EZ Check In App.

1. If the patient uploads a picture it will save to their chart > Documents > Photo IDs and Insurance Cards Folder
 - a. When a patient uploads a new photo, it will not delete the existing one—you'll still have access to the previously saved image. The new photo will simply be added to the same folder.
2. Patient has the option to Skip



Ability to Manually Type In Time

You can now manually type in the appointment time directly on the appointment card, instead of only using the time picker.

Edit Appointment for Paul Del Monte ✕

Patient
Paul Del Monte (M, Jan 30, 1960, PADE0000)

Clinic
ADCI Clinic

Provider
Kristie Jenkins, PA-C

Chief Complaint
Laser

Appointment Type
Laser

Recall

Resources
Laser (Room 2) ✕

Established Patient
 New
 Established

[Manage Consents \(8 Unsigned\)](#)

Status
Scheduled

Not Arrived Yet

Date of Service
05/12/2025

Start Time	End Time
12:30 PM	01:30 PM

12 : 30 AM PM

Prior Authorization



How to Include an ICD-10 Code on a Prescription

Some pharmacies are now requiring an ICD-10 code on prescriptions. To accommodate this, you can now add an ICD-10 code by toggling on the 'Assessment' section in the Rx detail screen.

The screenshot shows the Rx detail screen for "clobetasol 0.05 % topical cream". At the top right, there is a "Done" button with a star icon. Below the medication name, there are two toggle switches: "Assessment(s)" and "Locations". The "Assessment(s)" toggle is currently turned on and is highlighted with a green box. Below the "Assessment(s)" section, there is a list of assessments, with "Atopic dermatitis" listed. The "Medication" section includes fields for Name (clobetasol), Strength (0.05 %), Dosage Form (cream), Route (topical), Take (1 Application(s)), Frequency (QD), and Quantity (30 Gram). The "Signatur (Sig)" section contains the instruction "Take 1(one) application(s) topical every day". The "Note to Pharmacist" section contains the note "<This field is not intended as SIG replacement, or for other instructions related to the patient>". The "Patient Counseling Note" section is currently empty.

📞 Patient DOB Added to Recall List

Column added under the Recalls tab with the patient DOB.

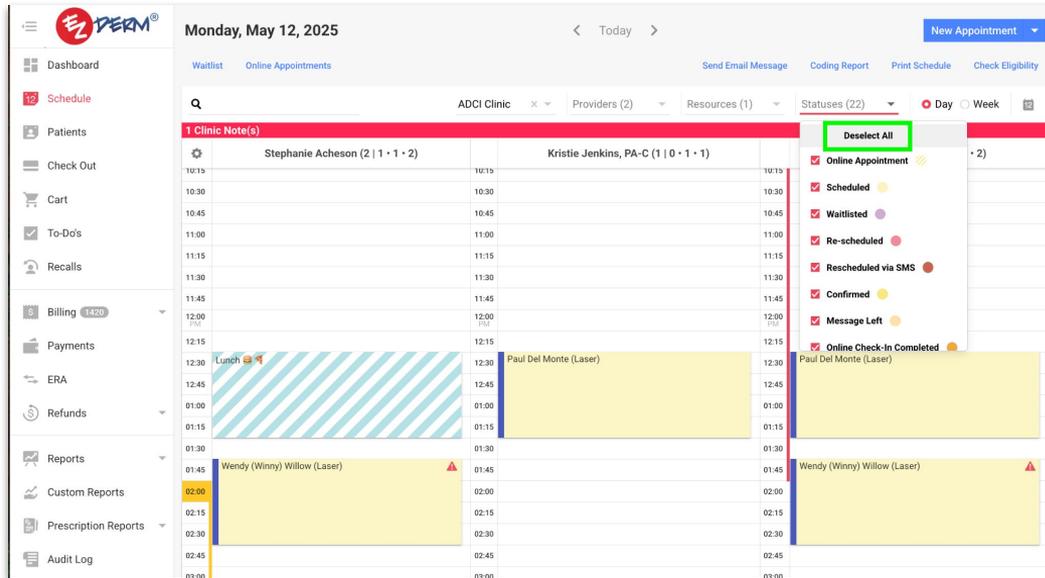
The screenshot shows the EZDERM Recalls interface. On the left is a sidebar with navigation options: Dashboard, Schedule, Patients, Check Out, Cart, To-Do's, Recalls (highlighted), Billing (1420), Payments, ERA, Refunds, and Reports. The main area displays a table of recall records. The table has columns for Internal Note, Patient, DOB (highlighted with a green box), Problem, Recall Type, Due Date, Last Appointment, Next Appointment, Next Appointment Type, Provider, Phone, Address, Email, Preferred Language, Preferred Communication, and Status. The table contains 15 rows of data.

Internal Note	Patient	DOB	Problem	Recall Type	Due Date	Last Appointment	Next Appointment	Next Appointment Type	Provider	Phone	Address	Email	Preferred Language	Preferred Communication	Status
	Stephany Jimen...	11/18/1987	Acne	Accutane Follo...	12/13/2024	04/08/2025			Stephany P Rest...	(239) 438-83...	123rd Street...	stephyj1120...	English	Mobile Phone	Email S...
	Theresa Acheson	12/29/1992	Acne	1 Year Skin Exam	12/19/2024	03/30/2024			Jennifer Calvert...	(239) 572-57...	9128 Foxwo...	testezderm...	English	Mobile Phone	Email S...
	Regular Follow	11/14/1996	Neoplasm of...	1 Year Skin Exam	12/20/2024	07/01/2024					Hah 1, La, C...		English		Active
	Stephanie Ache...	07/05/1990	Rash	1 Year Skin Exam	12/20/2024	10/02/2023			Stephanie Ache...		456456 bay ...	sball1263@g...	English		Active
	Isabella Swan	10/02/1981	Acne	Acne Recall	12/22/2024	03/13/2024			Jennifer Calvert...		461 Pine Rid...	jcalvert622@...	English		Email S...
	Fort Tester	07/14/1988		Accutane Follo...	12/26/2024				Kimberly Wilson...	(555) 555-55...	555 Pine St ...	kwilson@ezd...	English		Active
	Test Ashe	07/16/2010	Acne vulgaris	Accutane Follo...	01/16/2025				Kimberly Wilson...	(555) 555-55...	555 Pine St ...	kwilson@ezd...	English		Active
	Jennifer Calvert	10/02/1981	Acne vulgaris	Accutane Follo...	01/22/2025				Jennifer Calvert...	(888) 888-88...	4631 Pine Ri...	CalvertJenn...	English	Email	Active
	Chelsie Ezderm	02/01/1986	Acne	Acne Recall	01/23/2025	07/18/2024			Chelsie Smith	(619) 888-23...	1224 sunny l...	chelsie757@...	English	Mobile Phone	Active
	George Michael	06/25/1963	Acne	Accutane Follo...	02/02/2025	02/24/2025			Kimberly Wilson...	(260) 413-33...	4850 Tamia...	kimberlywils...	English		Email S...
	Juniper Wilson	09/25/1985	Acne	Accutane Follo...	02/02/2025	03/18/2025	06/27/2025	General	Kimberly Wilson...	(260) 555-55...	555 Pine Dr ...	summitcityc...	English	Mobile Phone	Email S...
	Juniper Wilson	09/25/1985		Acne Recall	02/02/2025	03/18/2025	06/27/2025	General		(260) 555-55...	555 Pine Dr ...	summitcityc...	English	Mobile Phone	Active
	Kelsey Test	08/08/1988		Accutane Follo...	02/09/2025				Kimberly Wilson...	(555) 555-55...	555 Pine St ...	kwilson@ezd...	English		Active
	Lisa TTest	11/07/2022	Melanoma o...	MM Skin Check	03/06/2025	04/18/2024			Lisa Thayer	(888) 888-88...	100 Gore, orl...	ethayerapy@...	English		Active

Ability to Deselect All Statuses on Schedule

To more efficiently send batch messages to patients from the schedule, you now have the ability to deselect all statuses.

1. Click the option to Select All > then you will have the option to Deselect All
2. Select the status you want to message, such as “No Show”



The screenshot displays the EZDERM scheduling interface for Monday, May 12, 2025. The interface includes a sidebar with navigation options like Dashboard, Schedule, Patients, and Billing. The main area shows a calendar grid with appointments for Stephanie Acheson and Kristie Jenkins, PA-C. A dropdown menu is open over the 'Statuses (22)' filter, showing a list of appointment statuses with checkboxes. The 'Deselect All' option is highlighted in a green box. The calendar shows various appointment statuses such as 'Online Appointment', 'Scheduled', 'Waitlisted', 'Re-scheduled', 'Confirmed', and 'Message Left'.

→ 📱 Patient Communication Package Pro Now Available

What's New:

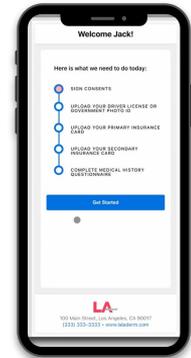
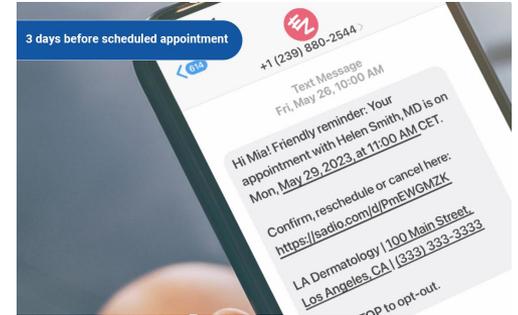
- **Multiple Appointment Reminders:** Send up to **3 SMS reminders** per appointment
- **Unlimited One-Way SMS Notifications:**
 - **Batch** messaging for past and future appointments
 - **Instant** messaging for individual patients

Plus:

- **Online Scheduling Module**
- **EZLink Check-In via SMS**

🌟 *Ready to activate these features?*

Contact **CustomerSuccess@ezderm.com** to get started!

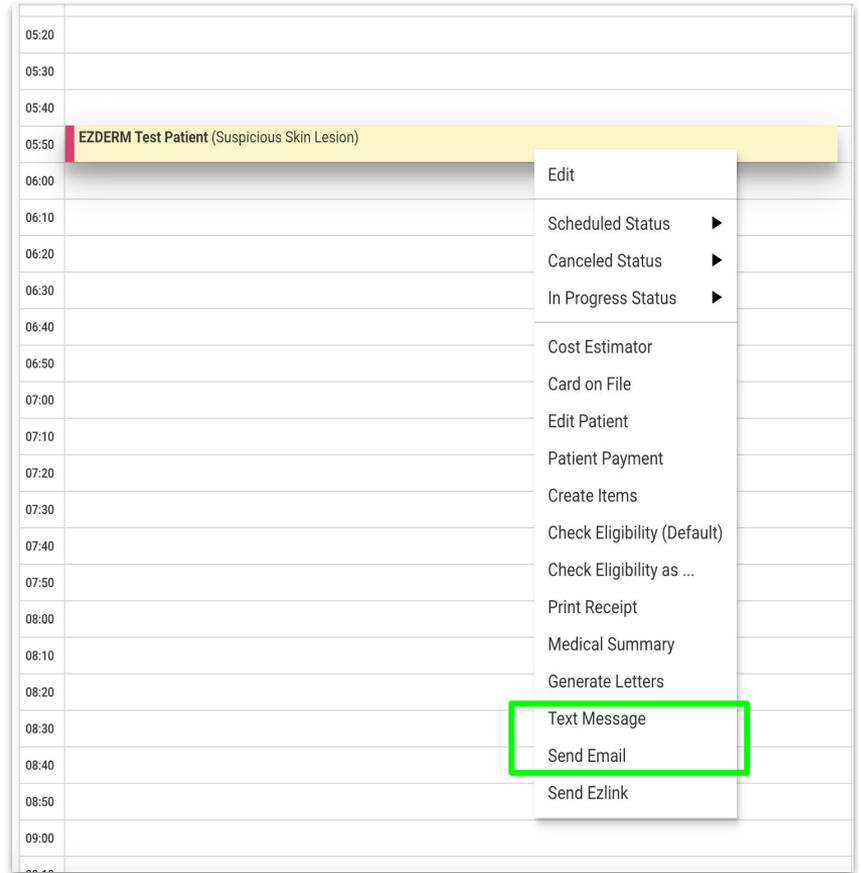


Ability to Send One Way Messages to Patients

You can now send patients a **one-way message** via **email** or **SMS** directly from the schedule:

1. **Right-click** on the appointment.
2. Click "**Send Email**" or "**Text Message.**"

◆ **Note:** The **Text Message** option is now sent instantly



Ability to Send a Batch Message to Patients

You can now send a **batch message** to all patients on the schedule:

1. **Filter** the schedule by clinic, provider, and/or appointment status to target specific patients.
 2. Click "**Send Email Message**" or "**Send Text Message**" from the top of the schedule in **PM**.
- ◆ **Note:** This feature is now available in the **Day View** for all future and past dates of service

Saturday, April 05, 2025

< Today >

New Appointment

Waitlist Online Appointments

Send Text Message Send Email Message Coding Report Print Schedule Check Eligibility

Search All Clinics Providers (2) Resources Statuses (19) Day Week

2 Clinic Note(s)

	MD (1 1 • 0 • 1)		Nurse Visit (0 0 • 0 • 0)
10:00		10:00	
10:10		10:10	
10:20		10:20	
10:30		10:30	
10:40		10:40	
10:50	EZDERM Test Patient (Suspicious Skin Lesion)	10:50	
11:00		11:00	
11:10		11:10	

Ability to Resend EzLink Check In

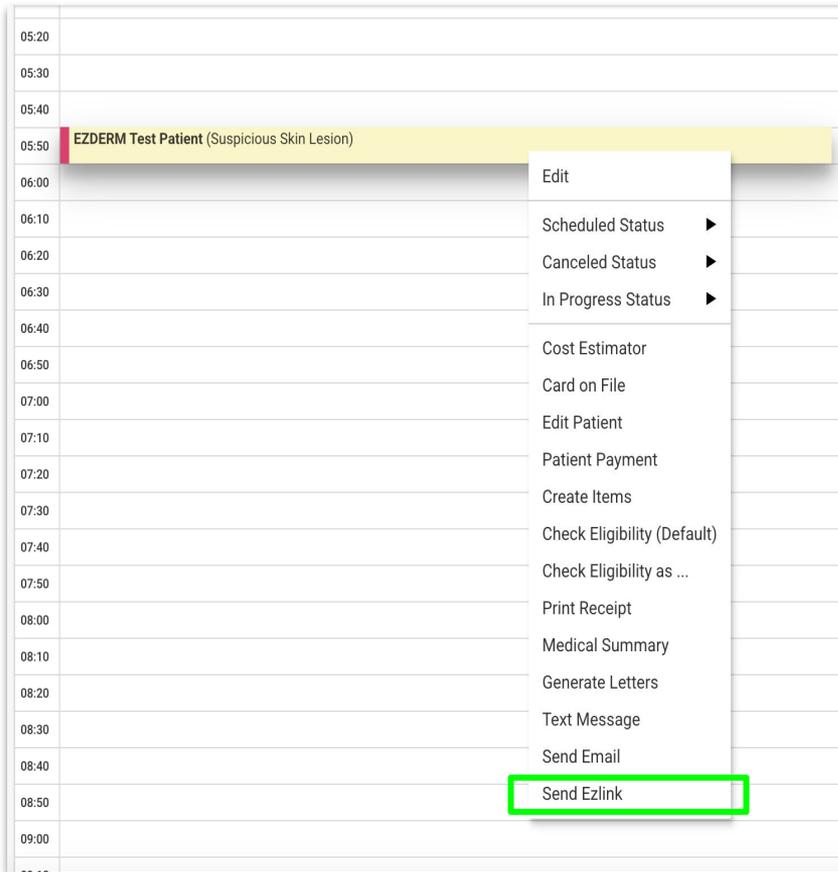
You can now resend the **EzLink Check-In** to patients via SMS anytime before their appointment from **PM**:

1. **Right-click** on the appointment.
2. **Click "Send EzLink."**

The patient will receive the EzLink within **15 minutes** to complete their intake, including:

- ✓ Signing consents
- ✓ Entering medical history
- ✓ Adding CCOF
- ✓ Uploading an insurance card and driver's license

Note: This feature is available only for users with **EzLink Check-In activated**. If you're interested, email customersuccess@ezderm.com!

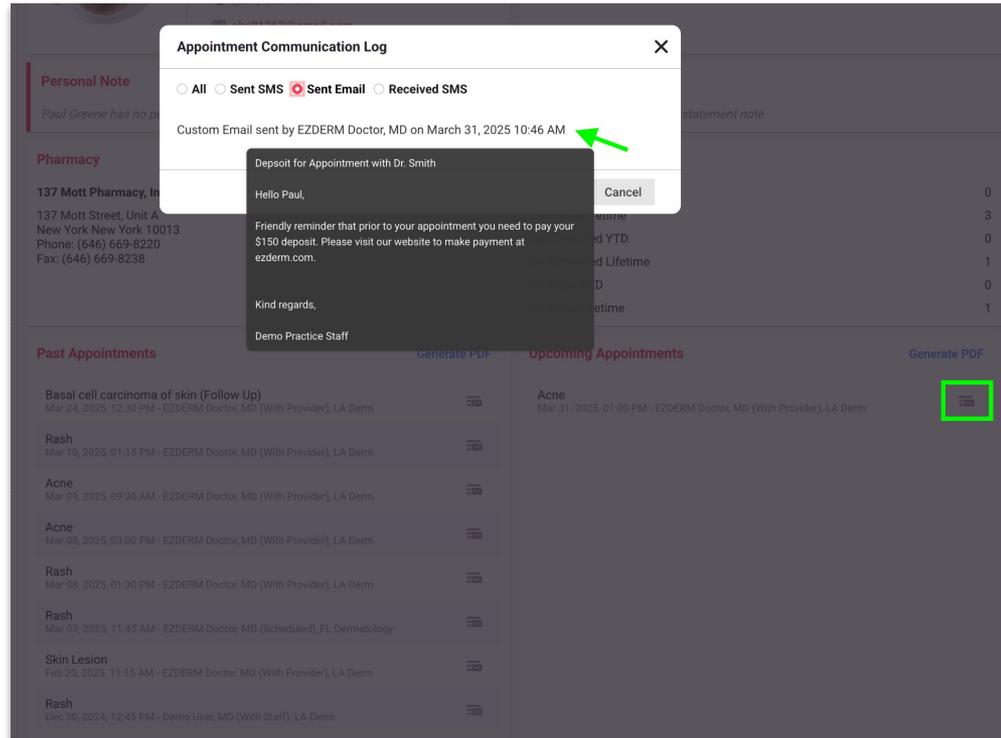


View Sent & Received Messages in the Appointment Communication Log

You can now access all sent and received messages from the **Appointment Communication Log**:

- **From the Patient's Chart:**
 1. Go to the **Summary** section.
 2. Click the **icon** to the right of the appointment.
- **From the Schedule:**
 1. Open the **appointment card**.
 2. Click the **blue button** at the bottom to open the Communication Log.

◆ **Tip:** Hover over a line item to view the specific message sent.



Increase Your Email Open Rate

Personalize the email address from which your practice's email communications are sent.

Action Items:

- ❑ Email techsupport@ezderm.com with your preference for the following 3 items: Practice Name, Short Practice Name, and Sender Name

Example:

Practice Name: Clear Skin Dermatology and Aesthetic Solutions

Short Practice Name: ClearSkinDermatology

Sender Name: Clear Skin Dermatology and Aesthetic Solutions

Customized email address: "From: Clear Skin Dermatology and

Aesthetic Solutions

<clearskindermatology-noreply@sadio.com>

