New Version Highlights 4.81.16

Rolodex

The Rolodex screen has been reformatted:

- The display areas are larger
- Options icons are more consistent with other modules
- Can access patient appointments from Rolodex (scheduler icon)
- Right pad displays more names
- Can single click a patient name to select
- Hygienist will now display along with assigned providers in top section of screen
The Patient Card has been reformatted:

- All icons have been moved to the top of the screen (recall, scheduler).
- Attachments are now accessible from the Pt Card (consents, etc.).
- Patient type has been moved under the chart location (float the cursor over the field to see all patient types).
- Visit info (last visit, last recall, next recall, next appt) have been moved under the patient photo.
- The last statement date has been added to the patient card.

- New marital status (Domestic Partner) has been added.
- On the Personal tab the Open date (date account was originally set up) was moved from the Codes tab along with an account status field (not used).
- On the Codes tab an option is available to have up to 5 free form text fields (e.g., Medical ID#) of up to 30 characters each for custom fields.
- On the Insurance tab there is a check option to display Expired benefit plans. Show Deleted plans is still an option.
- For Benefit plans there is an option that will allow renewing of a plan with new effective dates.
- Benefits Plan Coverage template (Coverage button) – has been changed to age limit fields for Child vs. Adult

- At the carrier level there is an option to apply the deductible amount based on a maximum # of family members.
The scheduler screen has been reformatted:

- The option icons have been changed to buttons to make them more consistent with the other modules. Print List and Print View are now buttons.
- The Rolodex can be accessed by clicking on the schedule or by clicking the Rolodex button (top button).
- The date options have been moved to the bottom of the display (Today, calendar, 1 Day). By clicking the 1 Day field 1 Day, 1 Week, 1 Month and 6 Month options display. Select Provider has also been moved to the bottom of the screen. Functionality remains the same.
- When an appt is selected the patient name now displays along the bottom of the screen.

- Patient name display in the appt can now be in either lastname,firstname or firstname lastname.
- A new feature called scheduling indicators (see $ in rt corner of above appt) which are automatically displayed based on criteria set up. In the above example the patient has a balance so the $ is displayed.
- If double book appts for a provider with only 1 column/chair the system will automatically split the display to show the 2 appts (as though had 2 columns/chairs).
- Move all appt blocks from 1 provider to another (rt click sched column heading).
- When using the rt click option to cancel/fail an appt can automatically charge patient at the same time.
- Recalls – for a recall attached to an appt the status of the recall can be updated (e.g., fulfilled/completed) automatically when the patient is checked-in.
- Pending tab has been reformatted. The existing functionality remains the same, but a search function and the ability to sort the list have been added.
Transactions

Adjustments tab
- Access to adjustment codes can be restricted by user level
- A dollar limit can be set for adjustments by user level

Insurance tab
- Can display insurance carrier details (highlight carrier/rt click).
- Secondary claims can now be submitted EDI.
- EOB can be attached to insurance payment.
EHR

- Change to Odontogram to display root specific procedures (e.g., RCT) for each tooth.
- Headings in the Alerts tab (right of odontogram) will not display if there is no info under the heading.
- Option available to allow correcting of an unapproved treatment’s status (C – I, C – P or I – P); also reverse an edited or deleted item.
- Patient forms:
  - Nested checklists are now available in forms (up to 10 levels)
  - Can require answers on a form
  - Form approval window now displays the name of the form being approved
- Clinical notes can be created to use yes/no, text, drop downs, numbers, dates, calculated fields and lists (similar to how forms work).
- Diagnosis codes are now available in all windows of the EHR.
- Patient summaries feature calculates classification (for caries and perio) using clinical input (findings); also calculates risk (for caries and perio) using clinical input or EHR form answers.
- Option to quickly enter diagnosis and planned treatment for tooth-based conditions by filtering possible treatments based on selected diagnosis. For example, if you pick a diagnosis of caries the system would know to display amalgam and composite procedure codes as options for treatment.

**Sticky Notes**

- Sadly, the wizard hat has been replaced by the Swiss army knife to access the options (when to display, delete, etc.)
- To post a note, click on the fold (lower left corner) and drag and drop the note as before.

**Messenger**

- Messenger now has an out-of-office reply in the options (Swiss army knife)