What's new in

Dolphin Management 10.1

Welcome to Dolphin Management 10.1!

This document provides an overview of many of the new features that have been added since versions 9 and 10. It is presented in reverse-chronological order, with Version 10.1 features, followed by V10.1 Specialty Module features, followed by Version 10 features.

Dolphin Management 1.10 is designed to work under Windows 7, Windows 8 and 8.1, Windows 10, Windows Server 2008 or higher, and SQL Server 2008 R2 or higher. Please see www.dolphinimaging.com for complete technical specifications. Dolphin Imaging 11.9 and Aquarium 3.4 are recommended for use with Dolphin Management 10 and 10.1

CONTENTS:

New Management Features in 10.1

Global

- We added a right-click option to show or hide group membership when viewing relationships on the **Treatment Card**, **Edit a Patient, Patient Navigator, Edit a Doctor**, **Billing Party**, **Edit an Employee**, and **Edit a Non-Patient** screens. Dolphin keeps this setting per computer and per screen until you change it.
- Any time you navigate to the **Lookup a Patient** screen, you can now search for a patient using the **Billing Party Phone** number.
- We added a new **Proposals** icon to the **Main** icon pane. This is another way to access patient treatment/contract proposals, which previously you could access only through the **Edit a Patient**, **Fees** tab.

AnywhereDolphin/MyOrthodontist Integration

- To support an upcoming feature in MyOrthodontist, version 4.5, we added the **Initial Photo Capture** group box to the **MyOrthodontist** tab of **MyOrthodontist/AnywhereDolphin Setup and Defaults**. Click the **Enable if patient has no timepoints/images** check box to activate this feature. You then have the option to specify an initial timepoint name, and up to six image types to capture. MyOrthodontist will then prompt users if they want to submit photos to the practice, and a wizard will guide them through this process.
- We made some improvements in AnywhereDolphin integration to check if a Dolphin user is or is not already and AnywhereDolphin user.
- The patient phone number is now mapped to the patient chart when a patient is added using New Patient Online Forms.

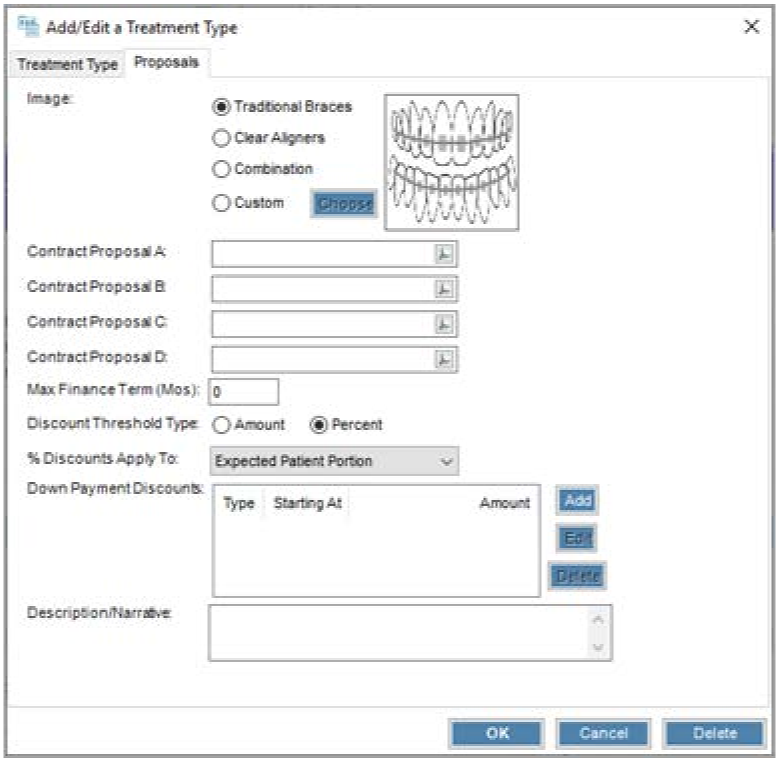
Document Organizer

- You can now paste in the main **Documents** screen when the custom folder is enabled.
- The drop-down list in DDO is visible to employees with administrator rights only.

Edit Menu

- You can now access Quick Notes setup directly from the Edit menu: ***Edit→General→Quick Notes*** opens the new **Quick Notes** dialog box. Use the **Quick Note Type** drop-down menu to select the type of quick note you want to add, edit, clone, delete, import, or export. You can navigate to the following types of Quick Notes from this new dialog box: Patient Comment, Chat Message, Day, Insurance Claim, and Letter.

- We have improved the way you set up treatment types.



We added a new **Proposals** tab to the **Add/Edit a Treatment Type** screen, which enables you to associate one to four contract proposals with each treatment type.

- We provide 3 images from which you can select as well as a **Custom** option, so you can import your own image to associate with a treatment type.
- You can link the treatment type to up to four pre-defined treatment proposal templates. This way you can automatically generate contract proposals whenever you use this treatment type for a new treatment proposal.
- On this tab you can set up the maximum number of months you can choose from when setting up a contract for this treatment type. (**Max Finance Term (Mos)**).

  - For automatic down payment discounts, you can set the starting threshold based upon a percentage or a fixed dollar amount of the patient portion due (**Discount Threshold Type**).
  - (For discounts based upon a percentage), the percentage can apply to the Gross Treatment Fee, the Expected Patient Portion (default), or the Net Treatment Fee (**% Discounts Apply To**)
  - In the **Down Payments** list box, you add discounts that apply based upon the **Discount Threshold Type**, and you specify when this discount starts. For example, does it start when you enter a down payment equal to 10 percent of the patient portion, or a when you enter a fixed amount of $250 or more?

- We changed the name of the **Treatment Proposal Template Editor** dialog box **to Contract Proposal Editor**, because that more accurately reflects its use. You access it through the **Edit→Financial** menu→**Contract Proposal Templates**.

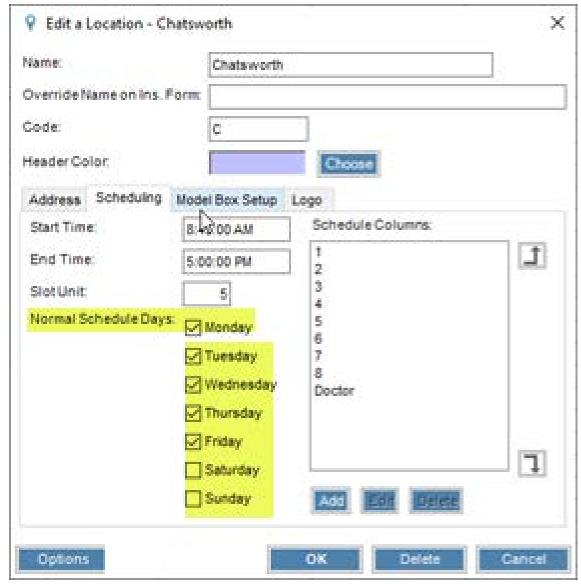
  - The new **Options** button opens a screen where you can select a letter to associate with each contract option. We have included 3 sample letters for this purpose.

- We added a new field type, **3rd-Party Integration**, for **User Defined Fields Setup**. This enables you to set up and launch a 3rd party integration from within Dolphin Management, wherever custom fields are used – currently Edit a Patient and Edit a Doctor, Custom tab and the Treatment Card header.

  Edit→General→Custom Fields

  When you set up this field type, you specify either a URL to a 3rd party's website or the full path to an executable on a network drive. A Parameters field is available for you add command-line options to a program or a querystring for a website.

- We widened the **Patient Status** drop-down menu on the **Edit a Patient→Status** tab.
- We improved schedule templates:



  - You can now specify which days of the week each practice location is normally open for scheduling via the **Normal Schedule Days** option. The default is Monday through Friday.

    Edit→Practice→Locations→Edit a Location dialog box→***Scheduling*** tab

  - When you apply a template to one of your practice locations, the **Apply Template** dialog box now has a new button: **Apply Location Defaults**, which will automatically apply the **[Closed]** template to any days not checked as **Normal Schedule Days**.

    Edit→Schedule Templates-->Apply button→***Apply Template*** screen

- The **Postal Codes** dialog box is now the **Countries, States/Provinces and Postal Codes** dialog box with 3 separate tabs: **Countries**, **States/Provinces**, and **Postal Codes**. The Postal Codes tab matches what was on the Postal Codes dialog box in the previous release.

  Edit→General→Countries, States/Provinces and Postal Codes

- We added a new button to **the Tooth Numbering System** screen: **Set All Employees**. When you click this button, a message pops up asking if you want to set this tooth numbering system to all employees.
- New employees can be added by employees with administrator rights only.
- You can now set the **Maximum password age (days)** field to a number higher than 50.

  Edit→Practice→Password and Login Setup

- We added a new option, **Enable Facial Recognition (Dolphin Mobile)**, to support a new facial recognition sign-in feature coming up in Dolphin Mobile V6

  Edit→Practice→Locations→Edit a Location→Options *button*→***Sign-In*** *tab*

  You can turn this feature off for specific patients on the **Edit a Patient**, **Patient (more)** tab.

Email

- For our Australian customers, we added a new option from the Ledger to email a "charge receipt." This enables practices to email invoices that are labeled as invoices rather than as receipts.
- We improved the way we set up Email accounts:

  - You can now associate practice locations to employee email accounts
  - You can create a default email account to use as a fall back for employees with no email set up.
  - Once an employee has his or her own email account, the default email account is no longer used for that employee.
  - An employee with administrator permissions can create an email account for another employee.

- You can copy a current email account
- You can filter email accounts by location and/or by employee.

Edit→Communication→Email Account Setup

- You can now specify text for HTML hyperlinks rather than the URL for the following link-based letter tokens used in HTML-formatted emails:

  - Online Questionnaires
  - Secure Letter/Document
  - Confirm Appointment
  - AnywhereDolphin Generic Invitation
  - AnywhereDolphin Billing Party Invitation
  - AnywhereDolphin Doctor Invitation

  If your practice is licensed for Dolphin MyOrthodontist:

  - MyOrthodontist Generic Invitation
  - MyOrthodontist Patient Invitation
  - MyOrthodontist Billing Party Invitation

  Edit→Communication→Email Templates→Options tab

Financials

- We now warn you when you attempt to open a ledger if:

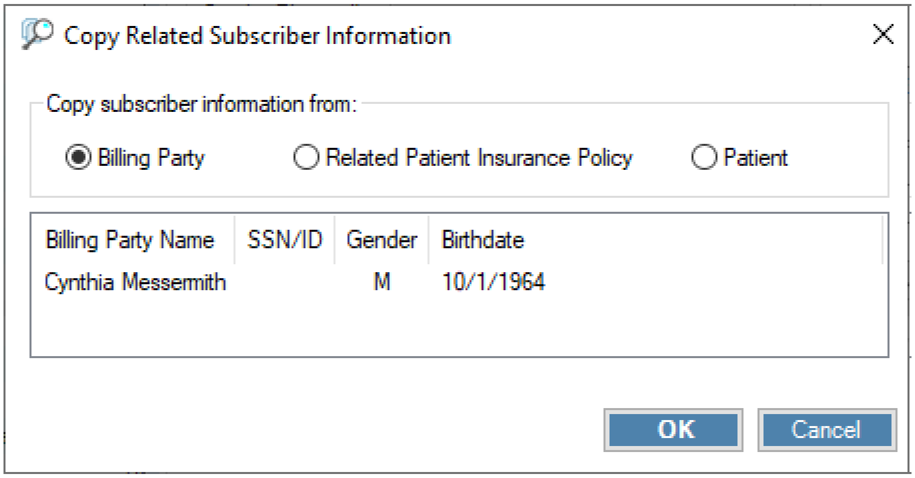
  - The patient is missing an assigned location or is assigned to a deleted location
  - The patient record does not have an assigned provider, or the provider assigned has been deleted.

- When you post an adjustment to decrease total due, you must choose the adjustment type, or it defaults to blank.
- We implemented support for OpenEdge Decline Minimizer for one-time/Point-of-service transactions with EdgeLink Cloud integration. Previously this was implemented for recurring payments only.
- We now populate the billing party name and address associated with the cardholder when posting debit transactions manually using PayWithBreeze integration.

Insurance

- You can now copy subscriber information from a billing party, related patient's insurance policy or a patient:

  From the **Edit a Patient** dialog box**, Insurance** tab, **Subscriber** sub-tab, click the lookup button next to the **Name** field. This opens a new selection screen where you can choose from where you want to copy the insurance subscriber information.



- We changed the **Insurance Treating and Billing Claim Information** screen. Now before you exit that screen, we prompt you if you would like to apply changes to any current claims in status New.
- For our Canadian customers we made the following label changes:
    - **CDA ID** field instead of the **NPI #** field on the **Edit a Location**, **Address** tab
    - **CDA Provider Numbers** group box instead of **NPI Numbers** group box on the on the **Edit an Employee**, **IDs** tab
- For our Canadian customers, we built in a new check for patients that have more than one insurance policy. The primary subscriber must have a birthday month and day earlier than the birthday of the secondary subscriber. This data is pulled from the **Subscriber** tab on the **Insurance Policy** screen.
    - When you load data on the **Insurance Claims** screen, Dolphin opens a warning message if any new or pending claims listed break this rule, and the message prompts you to view and fix these claims. All claims that break this rule will then be displayed on the screen, regardless of the search filters used on the main **Insurance Claims** screen.
    - When you save a new insurance policy for a patient that already has at least one policy, Dolphin checks if this rule is satisfied, and if it is not, provides you with an opportunity to change the primary subscriber.

Ledger

- At a customer request, we added a **TX Card** button between the **Patient** and **Appts** buttons on the **Ledger** tool bar.
- The pop-up message that is displayed when changing a patient's normal location has been changed to more accurately reflect how this will affect the patient ledger. The message now reads:

  "You are attempting to change this patient's normal location for … We will write a 'location change' ledger transaction to document that the balance was transferred to the new location. Previous transactions will remain tied to the original location and all new transactions will be tied to the new location. Do you wish to continue?"

Letters

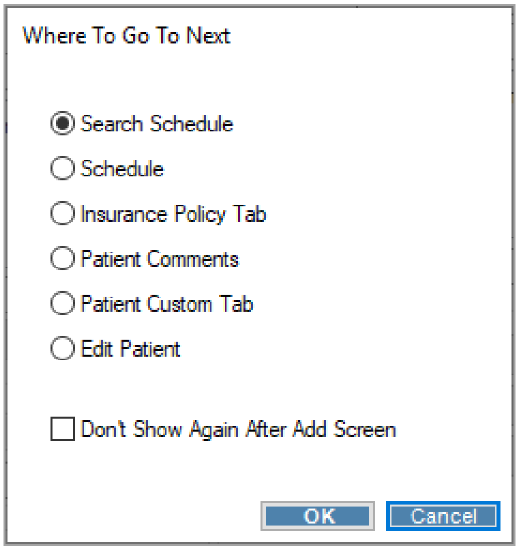
- As part of the orthodontic treatment/contract proposal enhancement, we made the following changes in the **Letters** queue and **Add Letter** features:
  - We added three sample letters:
    - DM – Tx Proposal – 1 option (Sample).doc
    - DM – Tx Proposal 2 Options (Sample).doc
    - DM – Tx Proposal 3 Options (Sample).doc
  - From the **Patient Treatment/Contract Proposals** screen, the **Print Proposal** button opens the **Add Letter** dialog box. There is a new option, **View Letter After Adding To Batch**, which, when checked, opens the **Letters** queue and merges just that letter, so you can view it.
  - The **Add Letter** dialog box now includes an optional field **Contract (Proposed)**. If you leave this field blank, you can print a proposal for several contracts; if you select one contract; that is the only contract proposal that is printed.
  - The **Letters** queue now includes a **Refresh** button, which you can use to show all letters in the queue, not just the treatment proposal letter.
  - The **Tables** tab in the **Dolphin Fields** dialog box now has two radio buttons - **Horizontal** and **Vertical** - from which you can choose to define the table layout.
  - We added a new table type to the **Tables** tab in the **Dolphin Fields** dialog box: **Proposal Contract Regular Charges**, which includes two new columns: ContractProposalPaymentAmount and ContractProposalRunningPaymentTotal for use in treatment proposal letters.
- When you delete a letter from the **Letters** queue, the letter is removed from the queue without the queue having to be refreshed
- We added a letter token for patient school information: PatientSchoolName.
- We added the UserSignature letter token, which merges the signature on file of the employee logged in at the time a letter is merged and printed.
- We added the TreatmentProposalTypeDescription token, which merges to the **Description/Narrative** field on the **Add/Edit a Treatment Type** dialog box, **Proposals** tab.
- You can now right-click a letter and send it directly to the DDO (**Send Letter to DDO**). If the letter is in status New, it will complete the merge and then send it to the DDO. If the letter is in any status other than New, the changes are merged, and the letter is sent to the DDO.

Light Bar Full Screen

The **Light Bar Full Screen** now honors the standard light bar options to show patient ID, patient name, and appointment type code.

Patient Information

- After you add a new patient, specify the minimum information required (Patient name, billing party name, location, and orthodontist) the new **Where to Go Next** pop-up screen appears, so you can quickly navigate to one of the following:



Dolphin remembers the choices made per user, and each user can opt to skip this pop-up screen, and instead always navigate to their saved choice.

Click the new **Options** button on the **Add a Patient** screen to reopen the **Where to Go Next** screen if you want to see it again.

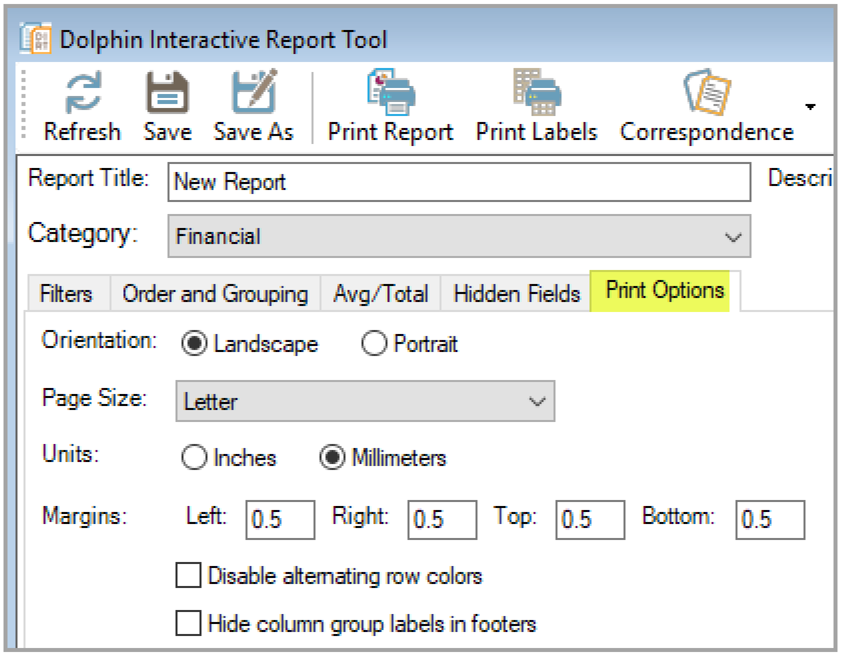
- You can now add Quick Note comments from the **Add a Patient** dialog box. This new feature replaces one of the two **New Patient Reminder(s)** text boxes that previously appeared at the bottom of that screen.
- You can now see a patient's status as soon as you open **Edit a Patient**. We added a patient status header to the upper-right of the **Edit a Patient**, **Patient** tab. Click this button to go directly to the **Status** tab.
- We improved the **View** drop-down menu on the **Edit a Patient**, **History** tab so you can filter on all or any combination of history events you select.
- The **Performed** column on the **Edit a Patient**, **Appointments** tab, which remains hidden unless the check boxes, **Past** and **Today's** are checked, now retains its default width when it is shown.
- We improved the way you add treatment and contract proposals on the **Edit a Patient**, **Fees** tab, and you can now access the treatment proposal feature from the Main icon bar 

button See Treatment Proposals for more information and a link to a getting started document.
- We no longer prompt if you want to add a new insurance policy (Insurance tab) if this is the first insurance policy for a new patient. We also no longer prompt to add a new fee (Fees tab) if this is the first fee for a new patient.
- We added a new field on the **Edit a Patient**, **Patient (more)** tab to support the upcoming Dolphin Mobile v6 facial recognition feature. The new field **Disable facial recognition sign-in** gives you the option to make the patient sign in using one of the other sign-in methods.
- When an employee is added as a referral source for a new patient, other employees cannot view that employee's chart or documents unless they have administrator rights.

Reports

- Dolphin Interactive Report Tool

    - We added a **Print Options** tab (shown below), where you can specify page orientation, size, unit of measure, and print margins. You can also hide the column name associated with the group total average and/or count in the group footer and disable alternating row colors.



    - We added the following fields under Patient report category, Financial Fields field category:

        - Patient Has Recurring Payments, which returns Yes or No if there are unposted recurring payments on a started contract.
        - Patient Has Payment Plan, which returns Yes or No if there are unposted payments on a payment plan.

    - We added the following fields under Patient report category, Patient Insurance field category:

        - Is Primary
        - Is Secondary
        - Accept Assignment
        - Continuation Frequency
        - Pre-determination Form Required
        - Initial Form Required
        - Continuation Forms Required

    - We added the following fields under Patient report category, Patient Current Status field category:

        - Patient's Current Status Start Date
        - Patient's Actual Months in Status
        - Patient's Months Remaining to Estimated Completion
        - Patient's Percent to Estimated Completion

- You can now send mass correspondence to the default doctor assigned to each patient. Drag one of the **Default Doctor** fields into the report, and that doctor will be a selectable addressee.
- We enhanced the right-click **Column Function→Show only the first occurrence** sort option to include **by Patient**, **by Billing Party**, **by Doctor**, and **by Employee**. Using this feature, for example, you can send a single mass message to all billing parties tied to patients by choosing to show only the first occurrence of the billing party's email address. Previously, duplicate messages would be generated in cases where a billing party email was associated with more than one patient.

- We made the following changes to the Hummingbird reports:
    - We added three new custom DIRT reports:
        - Patients in Status - New Patient Added with No Next Proc Date

          A list of patients in status New Patient Added, with no future appointment
        - Patients in Status - New Patient Added With Next Proc Date

          A list of patients in status New Patient Added with a future appointment
        - Patient Status - Active Phase I to Inactive

          A list of patients who went from Active Phase I status to Inactive without being placed in Phase II
    - We removed the Consults Needed/Scheduled Statuses from the Hummingbird Setup, Categories tab and the corresponding DIRT report, Patient Is In Consults Needed/Scheduled Status.
- We added a new option on the **Print Report** screen for non-administrator users: **Show reports I don't have rights to run**, which is not checked by default. When checked all reports are listed, but those which the logged-in user cannot run are denoted with an asterisk.

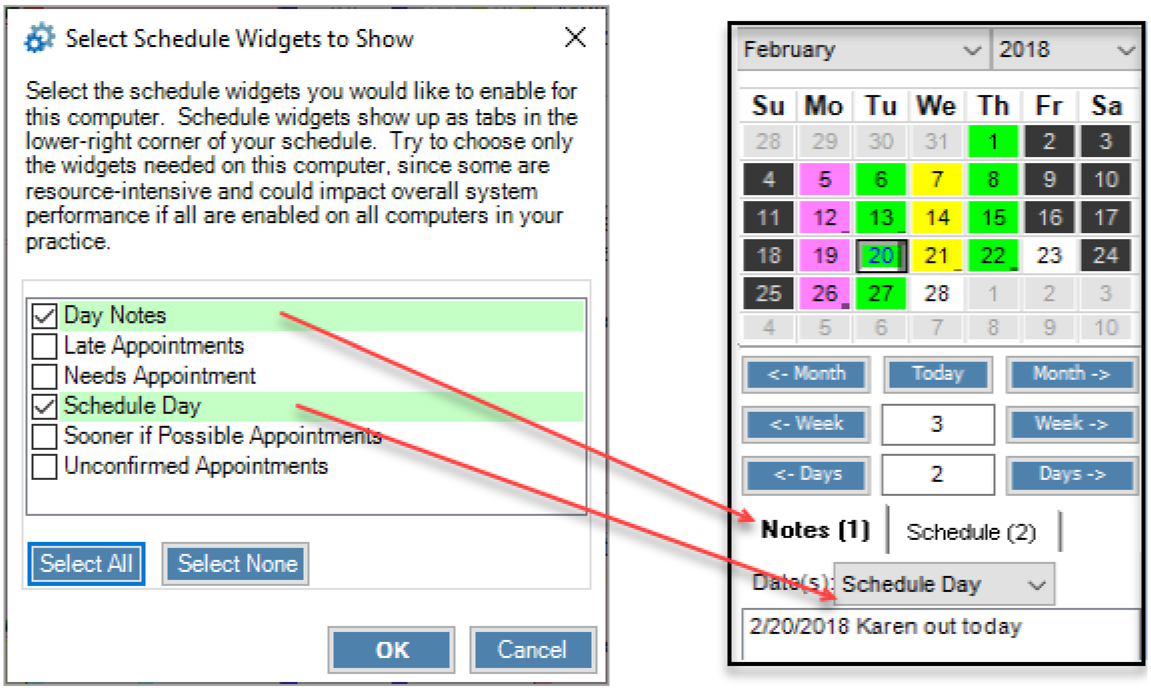
Schedule

- When you search the schedule and specify a location, the search now defaults to that location's open days.
- The account balance tooltips now exclude insurance ledgers from the calculation shown.
- Dolphin Management no longer prompts you to confirm after you cancel a light bar status change. If you would like to be prompted, simply click the new **Prompt to confirm light status change cancellations** check box on the **Light Bar Setup** screen.

  Edit→Scheduling→Light Bar Setup

- We made performance enhancements to Scheduling:
    - The **Schedule** tab will not reload when an appointment's status changes unless the date on the Schedule tab matches the date of the appointment.
    - When the **Scheduling** screen is open, but covered by other screens and apps, GPS appointment updates are queued until the **Scheduling** screen is brought to the foreground. The updates are processed in one batch.
    - We optimized the **Needs Appointment** tab on the schedule widget to improve performance and reduce server load.

- You can control which schedule widgets (the tabs below the Calendar widget on the right-side of the Scheduling screen) to show per computer. From **Scheduling**, select **Options→Select schedule widgets to show**:

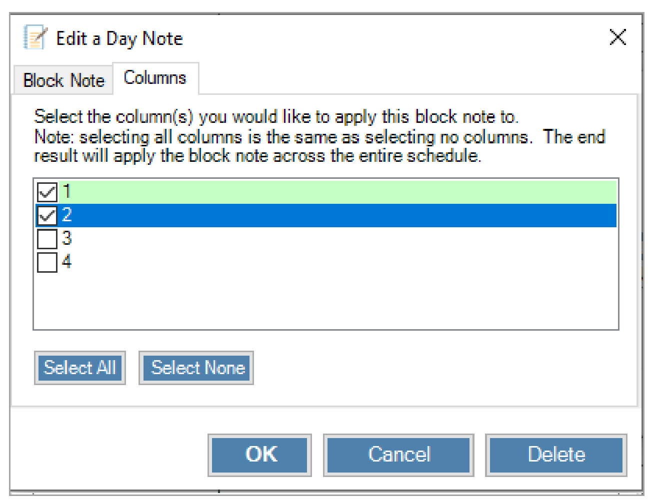


All options are selected by default except for **Needs Appointment**, which is the most resource intensive.

- You can now add the patient's birthdate (month and day) to **Patient GPS**:

  Patient GPS→Setup *button →**Columns** tab →**Available Columns** list box.*

- When you add a block notes (day notes that have start and end times associated with them) to the schedule, you can now choose one or more columns/chairs to which to apply the note. Once you specify a start time and end time on the **Day Note** dialog box, two new tabs appear:



  - **Block Note**
  - **Columns**

    Choose one or more schedule columns where you want the block note to appear. If you select all columns or no columns, the block note will cover all columns. If you select some columns, the note is either repeated in each column or it is repeated across each contiguous section of columns.

- We enhanced the ability to show or hide doctor information on schedule columns when viewing a day with provider reservations templated:

- If the schedule day you are viewing uses a template with provider reservations, the **Reservations** tool-bar button changes into a drop-down with two options:

  - **Show Appointment Type/Class Reservations**
  - **Show Provider Reservations**

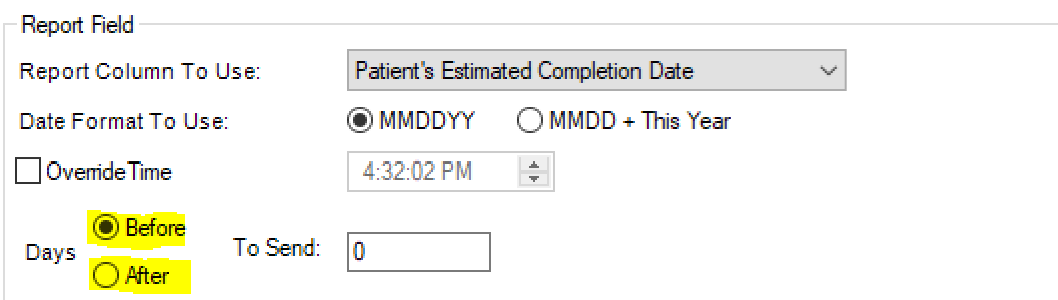
  You can choose one or both options, and Dolphin remembers the choice per user.

- If the schedule day you are viewing is not using a template with provider reservations, the **Reservations** button works the way it did in previous releases: it simply toggles the display of the reservation information on or off.

- When you schedule a new appointment or open the **Appointment** information screen, and check **Sooner if Possible**, a new field, **Not Before** appears. Use this field to select a date before which Dolphin will not offer an earlier schedule option. This field is optional, and if a Next Visit entry exists in the treatment card, that date is automatically populated in this field.

Scheduled Job Manager

- We enhanced the Setup options for the **Automated Email Messages** and **Automated SMS Messages** scheduled jobs. The **Report Field** group box **Days Before To Send** field has been redesigned so you can select the number of days before or after which you want to send the email or SMS message.

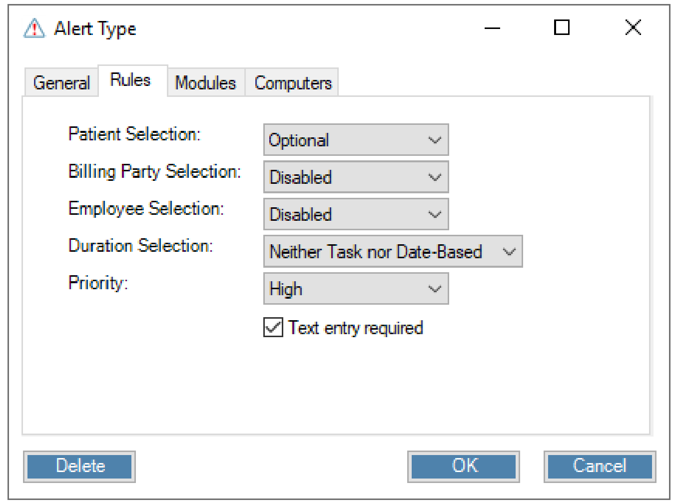


  If you choose **After**, you could send a follow-up email or message after a patient's last appointment or entry into a certain patient status, for example.

Super Questionnaire

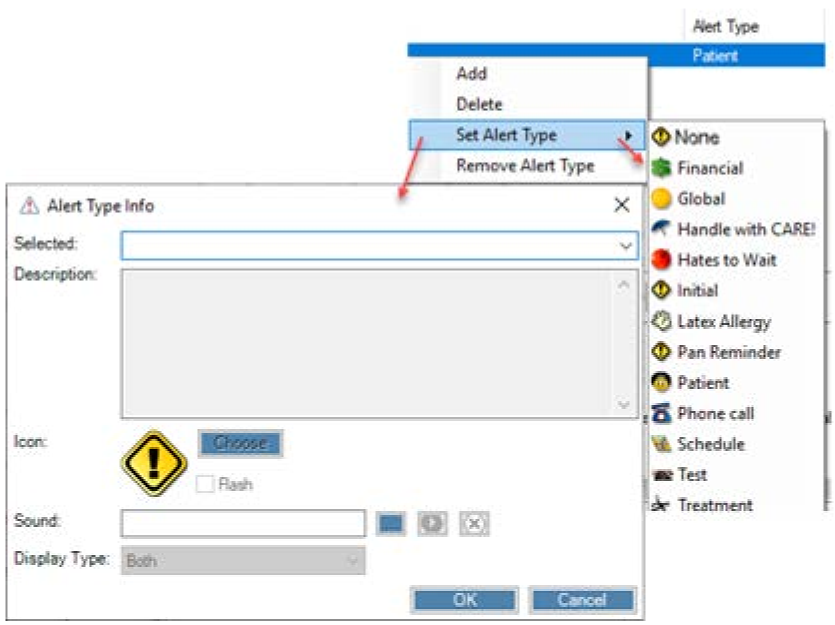
- You can automatically generate alerts based on answers in Super Questionnaire. You specify the alert type to associate with any multi-select, single-select, or drop-down question type.

  The **Add Answer** dialog box now includes an **Alert Type** pull-down list, where you can select the type of alert to associate with each answer. For an alert type to be included in this list, it must be defined with the following rules, which you access via **Edit→General→Alert Types→Alert Type** screen, **Rules** tab:



- Patient Selection **Optional** or **Required**
- Billing Party Selection: **Disabled**, **Optional**, or **Required**.
- Employee Selection: **Disabled**
- Duration Selection: **Neither Task nor Date-Based** or **Task**

For existing Super Questionnaires, you can associate an alert with any answers to the question types listed above. Simply right-click on an answer in the **Answers** group box and click **Set Alert Type** to open the **Alert Type Info** dialog box, or mouse over and select from one of the alert types in the drop-down list.



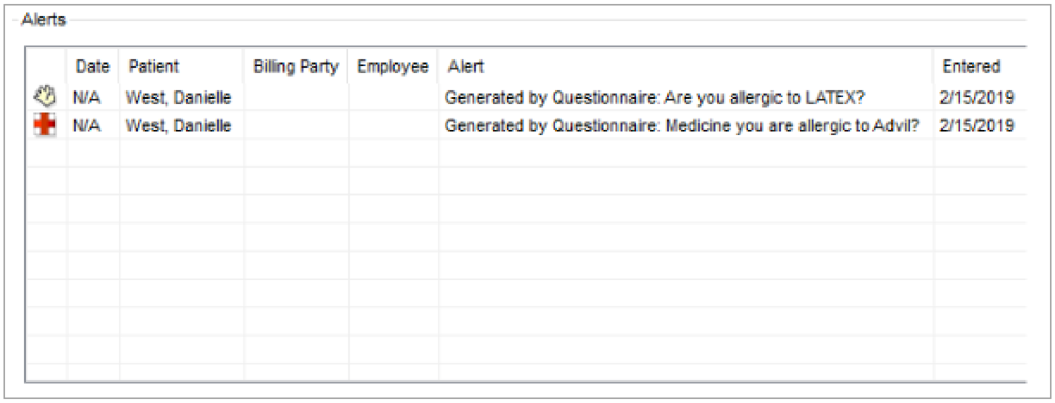
From the **Alert Type Info** dialog box, you can change the **Selected** alert type associated with the answer you selected.

You can have one of each alert type per question only.

Alerts generated by **Super Questionnaires** will show in the **Alerts** group box, on screens where the patient is in context, depending upon how you defined the rules on the **Alert Type**, **Rules** tab.

For example, if the **Patient Selection** rule is **Optional** or **Required**, the alert will show where the patient is in context, such as **Treatment Card**, providing the billing party rule is set to disabled or optional.

If you set the **Billing Party Selection** to **Required**, then the alert will show only where both the billing party and patient are in context, such as on the **Ledger** screen. If you set the Billing Party Selection to **Optional** or **Disabled**, the alert will show anywhere the patient is in context, such as the **Treatment Card** or **Edit a Patient** screens.



- When you send a super questionnaire to the DDO, it is now stored there with the name of the actual questionnaire.

Treatment Card

- You can now import and export Quick Notes for treatment card fields. If you select a field type (such as Text, Custom Lookup, etc.) that supports lookup items, the **Export** and **Import** buttons now appear on the **Lookup Items** tab. Note that dynamic, question/answer quick notes cannot be imported to field type Database Lookup, though standard notes can.

Edit→Treatment Card Setup→Fields tab→***Treatment Card Field→Lookup Items*** tab

- We made the following change **to Patient Analysis**:
  - On the **Practice** tab, **Total Fee** has been replaced with **Gross Fee** and **Net Fee**.
  - The **Fee per Hour**, **Estimated Fee per Month**, and **Estimated Fee per Visit** calculations are based on the **Net Fee**.

Treatment Card→Analysis button→***Patient Analysis*** screen→***Practice*** tab

- The **Questionnaire** button now opens a drop-down list of questionnaires completed or in progress for a patient. If no questionnaires currently exist, a single click on the **Questionnaire** button opens the **Questionnaire** or **Super Questionnaire** dialog box.
- We improved load speed performance when the **Load All Entries** option is not selected.
- When **Load All Entries** is not selected, the 10 most recent entries on each treatment card layout now load rather than the 10 most recent entries across all treatment card layouts.
- Column size changes are now saved as soon as you make them rather than after you click the OK or Save buttons.
- You can no longer use the **Set Field Color** option on Comment entries.
- The **Treatment Card Layout** drop-down field on the **Treatment Plan**, **Treatment Card** tab now defaults to the last selected treatment card layout rather than the first layout in the drop-down menu. This occurs when you switch between planned items with no treatment card field defaults defined.

Treatment Proposals

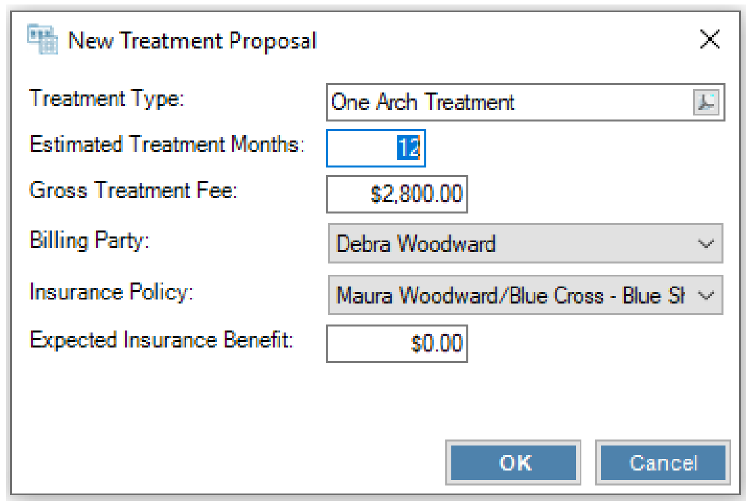
- You can now access the new Treatment Proposal feature via the Main icon pane, 

button as well as from the **Edit a Patient**, **Fees** tab, **Proposal** sub-tab. When accessed from the Main icon pane, you are prompted to select a patient before continuing.

  The following paragraphs describe this new feature in detail. If you want to get started using this feature, click on this link for Step-by-Step instructions from our Dolphin Training team.

  - You are immediately prompted to select a treatment type as soon as you click the **<Add Proposal>** button on the **Edit a Patient**, **Fees** tab, **Proposal** sub-tab. Once you select the treatment type, the **New Treatment Proposal** window opens with the following fields completed based on that selection:

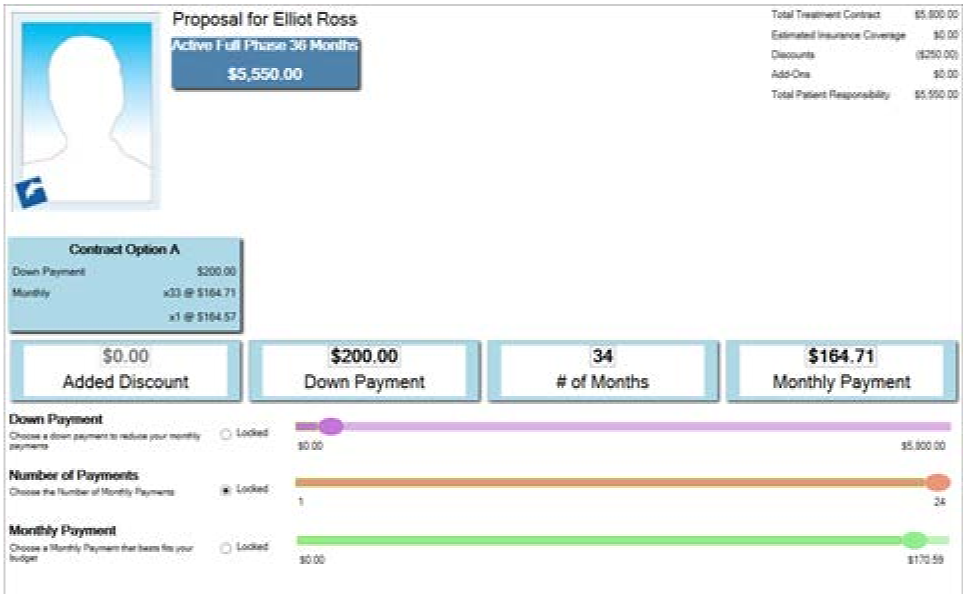
    - Treatment Type
    - Estimated Treatment Months
    - Gross Treatment Fee
    - Expected Insurance Benefit.
    - Billing Party and Insurance Policy (provided Accept Assignment and Show Ledger were selected on the Insurance tab, Policy Options sub tab)



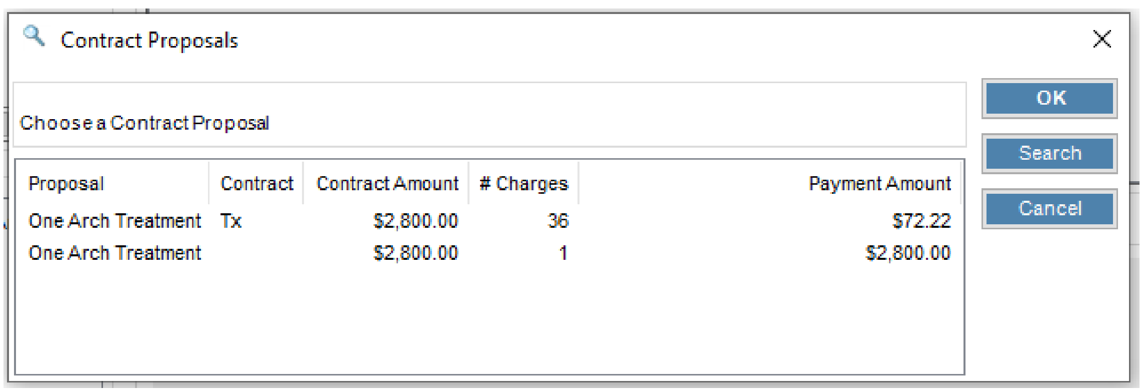
    You can modify any of these fields, and then click **OK** to have that information completed on the new proposal.

  - A default contract is set up for you based on your selections to the new prompts, so you do not have to click **<Add Contract Proposal>**.
  - Once you have one or more contract options on the **Fees** tab, **Proposed** sub-tab, you have the option to print the proposals or display them on your screen, via the new **Print Proposal** and **Present Proposal** buttons.

    On the **Present Proposal** screen, shown below, **Contract Option A** is preselected. You can change the down payment amount, number of payments, or monthly payment on this page (using the sliders) to show your patient/billing party various options. When you first open this screen, the monthly payment amount is locked by default. If you lock the number of payments slider, the monthly payment slider is unlocked, as shown below.



- When you add a treatment on the **Edit a Patient**, **Fees** tab, **Actual** sub-tab, and you had previously added one or more treatment/contract proposals, the **Contract Proposals** list box opens so you can choose which proposal you want to add. You can cancel out of this list box if you want to set up a new treatment for which there was no proposal.

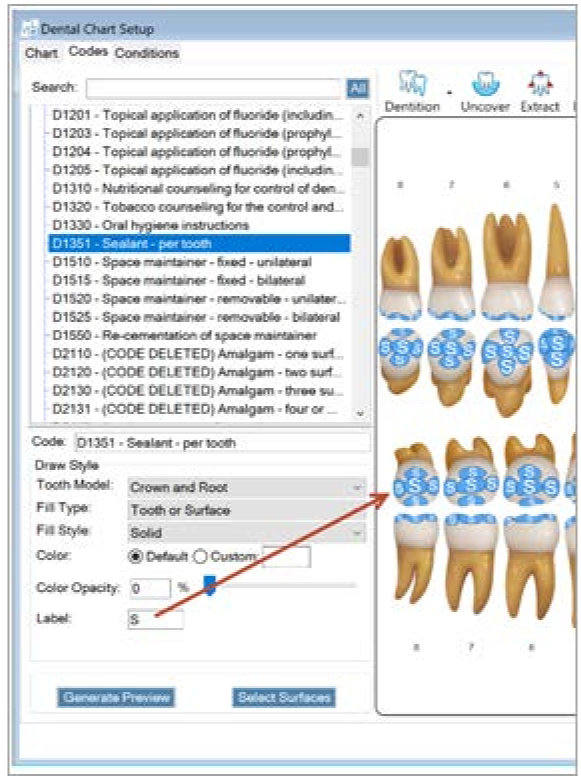


- Any itemized charges are displayed as collapsed by default when you open an existing contract proposal or apply a template to a contract proposal.
- Whenever a down payment discount is applied to a proposal, we store that number, so in case a patient signs a treatment proposal, and that discount is then modified, we keep the original number. In the case where the down payment discount threshold changes, we prompt the user whether he or she wants to accept the new number prior to converting the proposal to a real treatment contract.

Specialty Module – V 10.1

Available in this release is the Dolphin Management Specialty Module, which supports pediatric dentistry and multiple specialty practices (pediatric dentistry and orthodontics for example).

Dental Tooth Chart



- We increased the field size for **Quick Note Templates** from 6,000 to 8,000 characters when used for dental conditions in the **Dental Chart Setup**.

  Edit—>Treatment→Dental Chart Setup→Conditions tab, **Button Items**→Add→ **Condition Details** group box, **Quick Note** tab→**Edit**

- The tooth chart now supports labels for codes and conditions.

  In the **Dental Chart Setup** screen, **Draw Style** group box for both **Codes** and **Conditions**, there is a **Label** field. Enter text in this field to have it drawn to fit inside the filled tooth area corresponding to the code or condition.

  For example, if you enter "S" for a sealant code, Dolphin renders an "S" inside any surface(s) selected for that code performed or planned on a tooth.

- We now support selecting and unselecting a tooth on the **Dental Treatment** tooth chart.
- We made the following changes to **Draw Style** for codes and conditions:
  - The **Tooth Model** field defaults to **Crown and Root**; other options will be available in future enhancements.
  - There is a new **Fill Type** drop-down field, where you can specify how the tooth should be filled:
    - **Tooth or Surface** (Fill the entire tooth or selected surfaces only, if any are selected for the code or condition)
      We set this as the default for all pre-existing conditions and all codes that have the word tooth and/or surface in the description.
    - **Crown Only**
      We set this as the default for all codes that have the word crown in the description
    - **Root Canal**
    - **Root Tip**
    - **Gingival Margin**

- You can now add, edit, import, export, and delete conditions, and we now include a set of default conditions:

Edit→Treatment→Dental Chart Setup→Conditions tab

- We support Quick Notes when editing or adding button items to Dental Tooth Chart Conditions.

Edit→Treatment→Dental Chart Setup→Conditions tab→Button Items→Items→Add

Quick Notes are described in the standard Dolphin Management online help, and in this document, in **Quick Notes** under the section: New Management Features in 10.0.

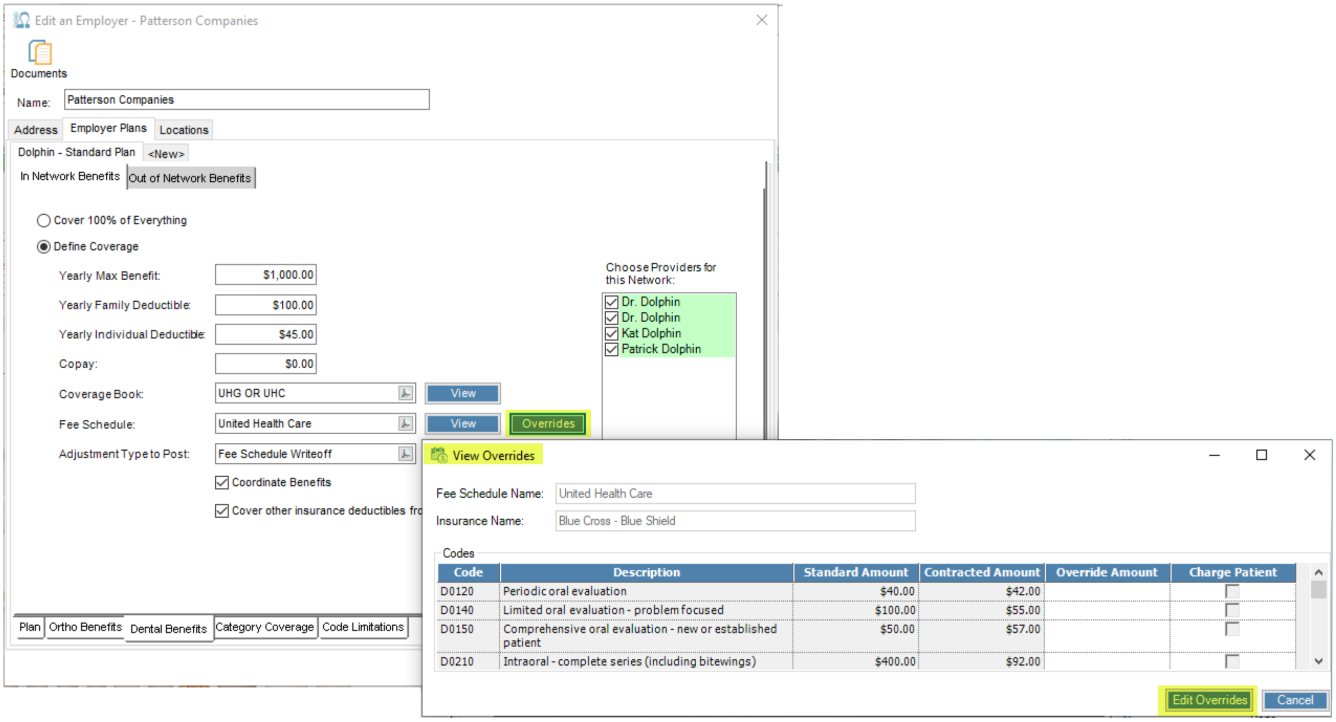
When adding a treatment card entry, Dolphin prompts you to complete the quick note.

Dental Treatment

- You can now visualize the procedures on the dental tooth chart when adding charges/codes.
- You can now select multiple teeth (Shift+Click) while adding charges to the charge grid, and a line item for each selected tooth is added to the grid.
- Procedure and condition colors on the **Dental Treatment** screen now layer over one another in the order applied. We have colors for Past Procedures, Current Procedures, Planned Procedures, and Conditions.
- The **Dental Treatment** screen now shows all patient conditions up to the current visit entry.

Overrides

You can now set up overrides (either downgrades or upgrades) when setting up an employer plan, provided you have added the codes you want associated with the downgrade or upgrade to the **Fee Schedule**. Once you set up an override, you can see it when you post a charge, write off the difference, or charge the patient the difference based on what the employer plan allows.



To access this new feature: **Edit→Financial→Employers→Edit an Employer→Employer Plans** tab**→Dental Benefits** sub-tab**→Overrides** button**→Edit Overrides** button.

Once in edit mode, you must specify a value greater than 0 for the **Override Amount**. If the employer plan allows you to charge the difference to the patient, click the **Charge Patient** check box.

When you post a charge, Dolphin checks if there is a downgrade, and if there is, the most you can charge the insurance is the downgrade amount. The difference between the downgrade amount and your standard amount is either charged to the patient/billing party (if allowed by the insurance plan), or written off, along with the difference between your standard amount and the contracted amount.

The **Insurance Worksheet**, which you can access from the **Post a Charge** dialog box, now includes override information, as shown in the following example:

In this example, the worksheet shows ($5.00) as the downgraded amount on the **Downgraded By** row because the insurance plan allows the practice to charge the difference to the patient. If the **Charge Patient** check box had not been checked, the **Downgraded By** row would not show because that amount would automatically be included in the **Base Insurance Amount**.

Edit Menu

- We added a Dentition Rule field that you can apply when tooth selection is required or optional for a charge code.

  Edit→Financial→Charges→Add a Charge→Codes tab→Edit Code→Charge Code screen→***Dentition Rule*** field.

  The options are:

  - Permanent or Deciduous - either permanent/adult or deciduous/primary teeth can be selected
  - Permanent Only - only permanent/adult teeth may be selected
  - Deciduous Only - only deciduous/primary teeth may be selected

Help Menu

To access online help for the Specialty Module, from the Help menu, select **Specialty Module Help**.

Treatment Card

- If you have multiple treatment card layouts and two or more have Proposed entries, when you right-click to access the **Create Treatment Proposal from Treatment Card Entries** screen, you will now see tabs representing each treatment card layout. The active tab corresponds to the layout you were on when you accessed the right-click menu, and this is the tab that will print when you click the **Print** button.
- When you check out a patient, the **Check Out** wizard now shows a **Proposals** button if that patient has treatment proposals on his or her treatment card.

  Click the **Proposals** button to open **Treatment Proposals**, so the patient/billing party can review them. Once you mark a proposed item as accepted, the Proposed entry is immediately converted to a Next Visit entry on the patient's treatment card.

- After you have added a Proposed entry on a patient's treatment card, and right-click to access the **Create Treatment Proposal from Treatment Card Entries** screen, we now prompt you if you make changes, and click **OK** without clicking the **Print** button:

  "You have changed some statuses and have not printed. Would you like to print a copy to the DDO first?"

- We made the following specialty-specific change **to Patient Analysis**:

  - You can now filter data based on the new **Specialty** filter.
  - The specialty assigned to the current treatment card layout in use is selected by default when you open **Patient Analysis**.
  - You can also use the new **Specialty** filter all counts on the **Patient** tab, including an **<All>** option, to see counts across all specialties.

Reports

- You can now track discounts through DIRT with the following new fields:

  - In the Billing Party field category:

    - Billing Party's Dental Percentage
    - Billing Party's Dental Discount Description

        - Billing Party's Dental Discount Code
        - Billing Party's Dental Discount Is Setup

    - In the Default Billing Party field category:

        - Default Billing Party's Dental Percentage
        - Default Billing Party's Dental Discount Description
        - Default Billing Party's Dental Discount Code
        - Default Billing Party's Dental Discount Is Setup

- We added the following DIRT fields for specialty patients in the Schedule Charge field category:

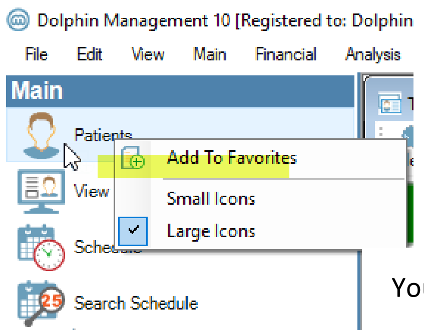
    - Schedule Charge Discount Amount
    - Schedule Charge Sum of Charge – Discount Adjustment
    - Schedule Charge Treatment Discount Code
    - Schedule Charge Treatment Discount Description

- We added the Benefit Period Start Date field in in the Patient Insurance field category.

New Management Features in 10.0

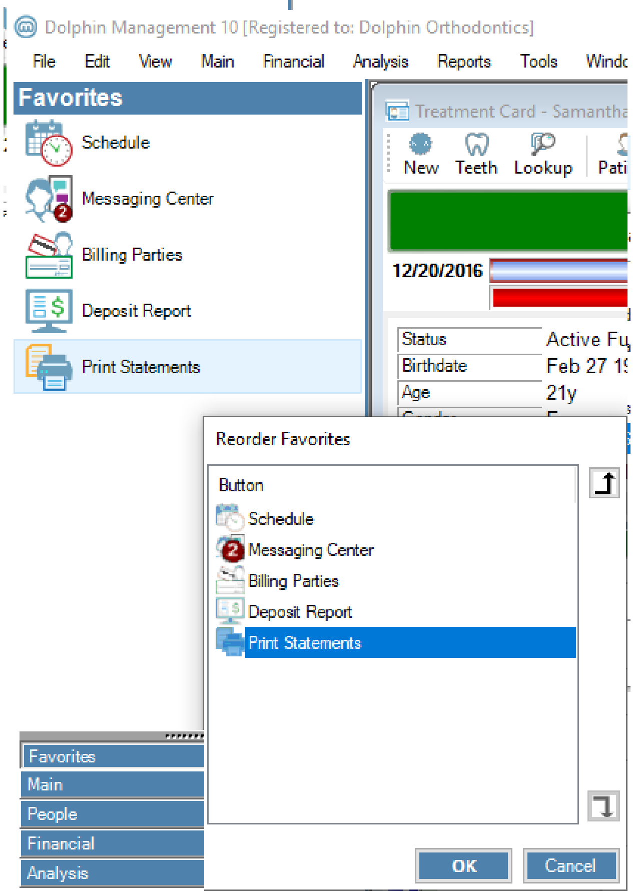
Global

- You can now create a per-user, customized Icon Pane. From any of the available Icon Panes, simply right-click a button (such as **Patients**, for example), and select **Add To Favorites**.



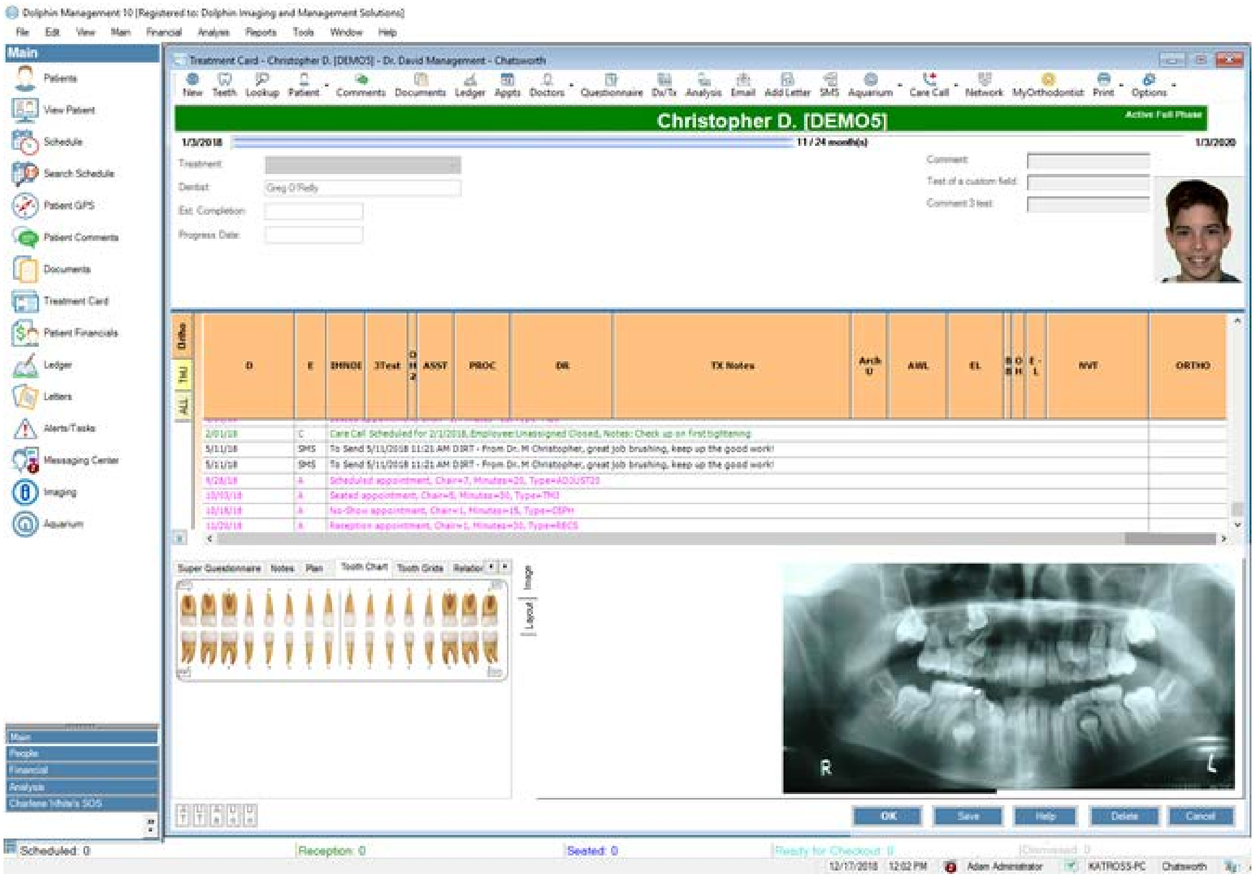
After you add your first button, a new Favorites button is added to the Icon Pane, and this opens by default when you log into Dolphin Management.

You can continue adding as many buttons to Favorites as you want; these buttons remain accessible from their original location also.



You can reorganize the buttons in Favorites, and you can have as few or as many buttons as you need. If you remove all the buttons from Favorites, the Favorites button goes away, and the Main icon pane opens when you log into Dolphin.

- Based on responses from several Dolphin customers, we have added some color back into the icons and several places throughout the product, as shown in this **Treatment Card** screen shot below:



Quick Notes

- We have added the ability to set up and use quick notes across many areas of the product, and we will continue to add this to other areas as customers request it.

  You can set up two kinds of quick notes in Dolphin Management:

  - Simple, text phrases that you can pick from and add to a treatment card comment, a schedule day note, or a quick letter note.
  - A template that consists of one or more question/answer pairs that cover common topics you might log in a treatment card comment, schedule day note, or quick letter note.

    Additionally, you can export and import both kinds of quick notes from and to your practice, and you can clone a quick-note, enabling you to use the copy as a starting point for a new quick note.

    Both simple text lookups and quick notes are available:

    - Edit→Communication→Quick Letter Notes
    - Edit→Treatment→Treatment Card Setup→Add/Edit a Treatment Card Layout→Quick Comments tab
    - Chat Message Viewer→Options→Quick Message Setup

    - Letters dialog box→Options→Setup Quick Letter Notes
    - Schedule dialog box→Day Notes button→Options—Setup Quick Day Notes
    - Treatment Card→Notes tab→Unlock→Lookup
    - Treatment Plan→Notes tab→Unlock→Lookup
    - Patient Comments→Options→Setup Quick Patient Comments
    - Insurance Claims→Options→Setup Quick Insurance Claim Notes
    - Insurance Claim (Insurance Claims→Edit a claim), General tab, Printed Paper Comment and Full Electronic Comment (Non Transmitted) list boxes

  These are described in more detail in the online help.

- When entering quick notes, you can now switch between a new list-style wizard and the standard wizard, via a new **Switch** button. The list-style wizard does not have the **Next** or **Previous** buttons, but it has a scroll bar, so you can view all the questions, in the case of a multiple-question template. The **Start Over** and **Finish** buttons are available on the list-style wizard.

- At a customer's request, we enhanced the database log to honor the setting for ServerTimeOffsetMinutes in the Dolphin.INI file

Analysis

- When you resize columns in a **Practice Analysis** itemized view, the rows resize to fit the cell content. We also added an **Autosize** toolbar button to itemized views.

- For customers using the Hummingbird module:

  - the following new columns are available on Gross Charges, Balance Adjustments, Gross Collections (Payments), and Collection Adjustment sub-queries:

    - Ledg. Adjustment Number
    - Ledg. Date Time
    - Ledg. Serv Code
    - Ledg. Transt Code

    To access these options, load the Hummingbird Analysis view, and double-click in the Total column associated with the sub-query you want to view.

    When the **Financial Information** query loads, you can click the **Fields** button to open a list of available columns. The new columns will appear in the **Available Fields** list box.

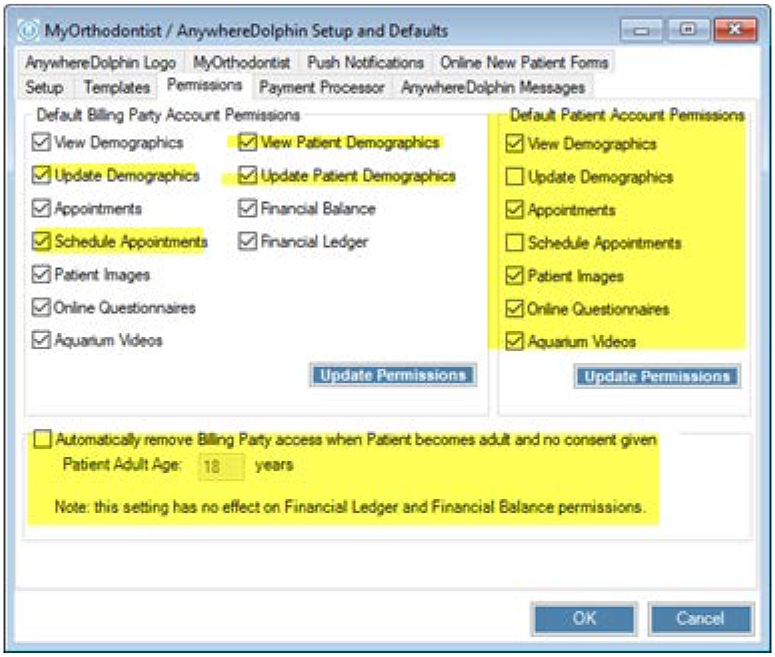
  - **Amount** is now one of the default fields you see when opening any of the **Financial Information** items on the **Practice Analysis**, **Hummingbird Analysis** view.

AnywhereDolphin/MyOrthodontist Integration

- We replaced the **Defaults** tab with two new tabs: **Templates** and **Permissions**.

  The **Templates** tab contains the AnywhereDolphin invitation, questionnaire and add or update user name templates previously found on the Defaults tab.

The **Permissions** tab contains the default items to share fields previously found on the **Defaults** tab, plus some new fields as well:



All billing parties can new view and update patient demographics only if the **View Patient Demographics** and **Update Patient Demographics** fields are checked. There is also a new option to remove billing party access to these and all other patient fields (Financial Balance and Financial Ledger excepted) after the patient reaches 18 years or whatever age the practice specifies.

There is a separate set of patient access permissions now as well.

- When you click the My Orthodontist/AnywhereDolphin button while on the **Edit a Patient**, **Billing Parties** tab, the **MyOrthodontist/AnywhereDolphin User Settings** dialog box will default to the billing party account.

Care Calls

There is now an **Add** button in the **Notes** section of the **Care Call** dialog box. Click this button to add a date and time stamp to the **Notes** field, and place the cursor on the line below the stamp.

Chat Message Viewer

- We added the **Regarding Patient** filter to the criteria, so you can view messages pertaining to a particular patient.
- There is a now a **Regarding Patient** lookup on the **Send Message** and **Reply** screens. When you send or respond to a message regarding a patient, you can right-click on it and access the standard patient context menu.
- We added a **Quick Message** button to the **Send Messag**e and **Reply** screens. Click this to access quick notes you can add to the chat message.
- We added an **Options** tool bar button with the following drop-down choices:
  - **Show incoming messages on top of other applications**—when this per-computer option is activated, any incoming chat messages pop-up outside of Dolphin Management, and they open on top of other running applications.

- **Quick Message Setup**—opens the **Quick Chat Message Note** screen, where you can configure both kinds of quick notes for inserting into chat messages.

Document Organizer

- There is a new **Options** button on the **Scanned Documents** screen, which gives you the option to set the PDF page size:
  - US Letter (the default setting)
  - US Legal
  - A4
  - Tabloid
  - Junior Letter

  This is a global practice setting.

- When you attempt to save a folder template without selecting an option on the **Applied to Record Types** tab, we now prompt you to select one. We do not allow you to create a folder template without selecting a record type.
- We added 

button to the **Documents** toolbar. Click this to access the **Signature Queue** dialog box where you can search for documents in the system requiring signature, such as treatment proposals and questionnaires. You can also access the **Signature Queue** from the **Main** menu.

  You can right-click on a document in the **Signature Queue**, and access the patient context menu, for patient letters. You can also select from one of the following options: Sign Document, Open DDO Folder, View Document, or Remove from Queue.

  You can also view the document, by selecting it, and clicking the **View** button on the **Signature Queue** toolbar.

  If you practice is licensed for MyOrthodontist, you can share the document with the billing party and/or patient, he or she can sign it through MyOrthodontist, and it will be updated in the Document Organizer. In the case where the doctor or another staff member needs to sign the document, the document is saved and the latest version (the signed version) is shared with the patient/billing party only.

  When you sign (or partially sign, in the case where a billing party or patient has signed, but the doctor still needs to sign) a shared document, the **Shared Documents** tab is updated with the latest (signed) version of the document.

Edit Menu

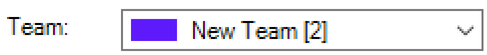
- We added the option **Default to use for SMS** to the **Phone Type** dialog box. This gives practices a global way to define certain phone types, such as mobile, for example, to be used for sending SMS messages.

  Edit->Communication→Phone Number, Type and Integration Setup→Phone Types tab--***<Add*** or ***Edit*** a phone type.

- We added the **Practice Name** field to the **Edit a Doctor**, **Doctor** tab. We also added a Doctor's Practice Name field to the Doctors report category in DIRT as well as a corresponding letter token.
- We added **Groups** and **Non-Patients** to the **Edit->People** cascade menu.

- You can now create patient care teams **(Edit→Patient→Patient Teams**) and distinguish them by name, description, and color. Each team can be associated with one or more locations. You add any number of employees to each care team.

  When you add a new patient, or edit an existing patient you now have the option to assign a team to that patient on the P**atient (more)** tab.

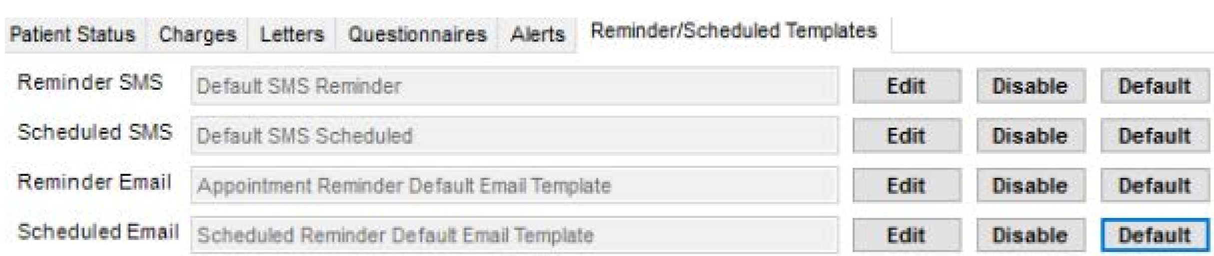
  

  The number in parentheses indicates the number of patients in that team.

- The **Past Due Messages** tab (Edit→Locations→Edit a Location→Options button) now has a custom **Number of days past due** field instead of the radio buttons for Over 30, Over 60, and Over 90. Use this field to customize how many days past due triggers a message at patient sign-in.
- We added the ability to associate a default contract proposal template with a treatment type (**Edit→Financial→Treatment Types→Default Contract Proposal** look-up field)
- We added the ability to associate customized appointment reminder and scheduled messages with appointment types. For example, for a bonding appointment type, you may want to use an SMS or Email template that mentions that fact. Or you can use the default, Dolphin-supplied global default templates. With this new feature, you can:

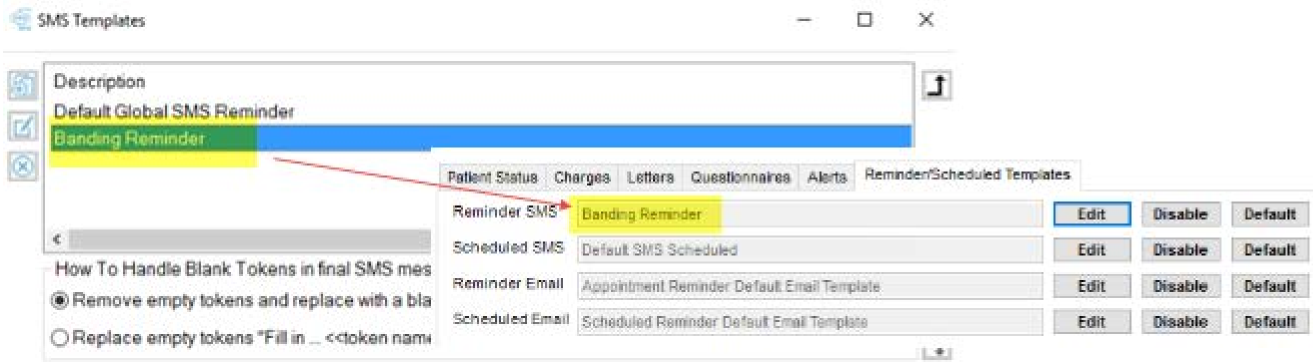
  - Add new templates to use for specific appointment types.
  - Edit the default templates used for all appointment types.
  - Disable automatic sending of reminder SMS message, Scheduled SMS message, Reminder Email, and Scheduled Email or any combination of the above, based on the appointment type.

    1. From the **Edit** menu, select **Scheduling→Appointment Types**.
    2. Select any appointment type to edit, and click the new **Reminder/Scheduled Templates** tab.

    3. Click **Edit** to edit any of the Default templates above.

    This opens the **SMS Templates** dialog box or **Email Template**s dialog box where you can edit Dolphin-supplied default templates, or add new templates specific to your practice, same as in the previous release.



After you have added a new template or edited an existing template, select it, and click **OK** on the **SMS** or **Email Templates** dialog box, and it is added to the **Reminder/Scheduled Template**s tab on **Edit an Appointment Type**, as shown above.

- We removed the **Waiting** tab, previously on the **Edit a Location Options** dialog box (**Edit→Practice→Locations→Options** button) because Dolphin Management no longer uses most options there.

  We moved the **Minutes until Priority** option to the **Sign In** tab, and it has been renamed to **Wait minutes until priority (red) in GPS**, which is more descriptive.

Employee Roles

You can quickly create new or edit existing employee roles by copying the application and/or report rights from an employee to that role. You can then use that role to assign rights to new employees.

Edit→Practice→Employee Roles→add/edit role→click ***Copy From Employee*** button

Email

You can now request a read receipt for emails sent from your practice:

- From an individual email, **(Email Settin**gs dialog box) check the new **Request read receipt** check box (not checked by default) in the lower left corner.
  This sends a read receipt request with this email only.
- In the **Email Account Options** dialog box, there is now a checkbox (not checked by default), **Request read receipt for all messages sent via this account**.
  When you check this box, all email messages are sent with a read receipt regardless of the **Request read receipt** check box setting on the individual email.

Financials

- We added the **Balances** field and two radio buttons on the **Checkout** wizard. Select the **By Patient** radio button to view charges pertaining to the patient at checkout time. Select the **By Billing Party (All Patients)** to see all charges based on the billing party (who is responsible for more than one patient). Dolphin remembers the option selected per user. The second option enables you to see the balance for all patients associated with a billing party and collect the money at checkout time.
- The **Recurring Payments** dialog box now includes a **Send to DIRT** toolbar button. Once the recurring payments list is sent to DIRT, you can filter, generate groups of outgoing letters, SMS, and email messages.
- We improved the speed at which the End-of-Day job applies open payments and/or adjustments to charges.

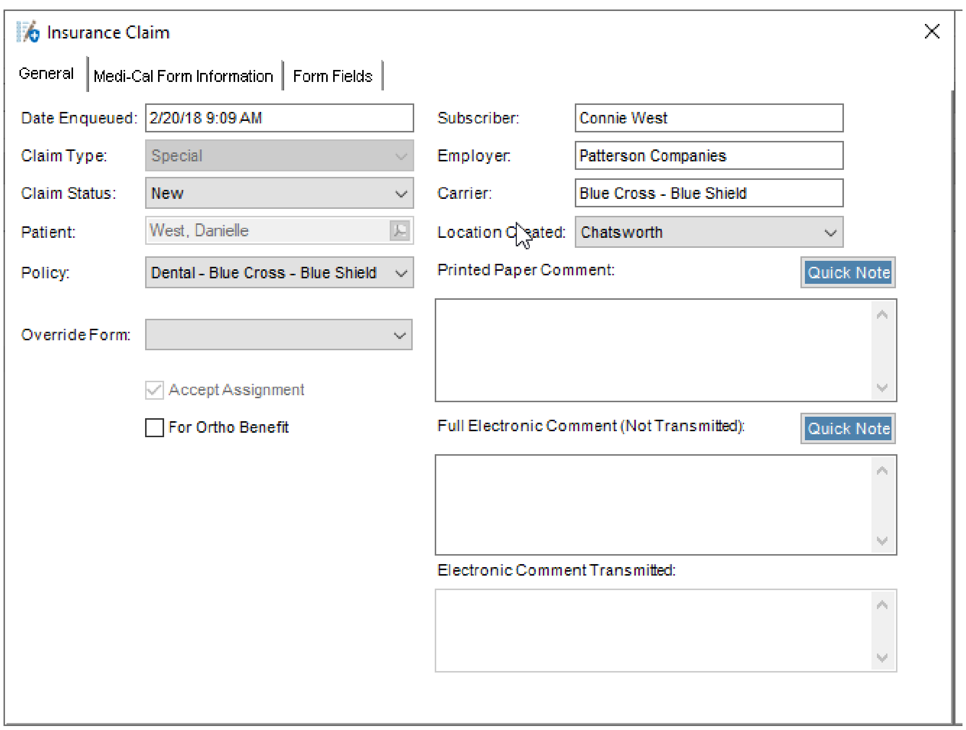
- Our EdgeLink Cloud integration now works with OpenEdge Decline Minimizer when capturing funds for recurring payments. If the card number and/or card expiration date returns something other than what is on file for recurring payment transactions, Dolphin updates the card information with what it received from OpenEdge.

- We now show the **Choose Locations to Close** dialog box when you have the System option, **Enable One Step End of Day/Month** activated and you have the System Option, **Always Run EOD/EOM for All Locations** activated. This way you can access the **One Step End of Day** option, which is on the **Choose Locations to Close** dialog box.

- The **Recurring Payments** dialog box, **Select** button includes the following new options:
  - Select All Pending
  - Select All Approved
  - Select All Declined/Error

Insurance

- We added the Quick Notes feature to the Insurance Claims queue:
  Insurance Claims→Options→Setup Quick Insurance Claim Notes

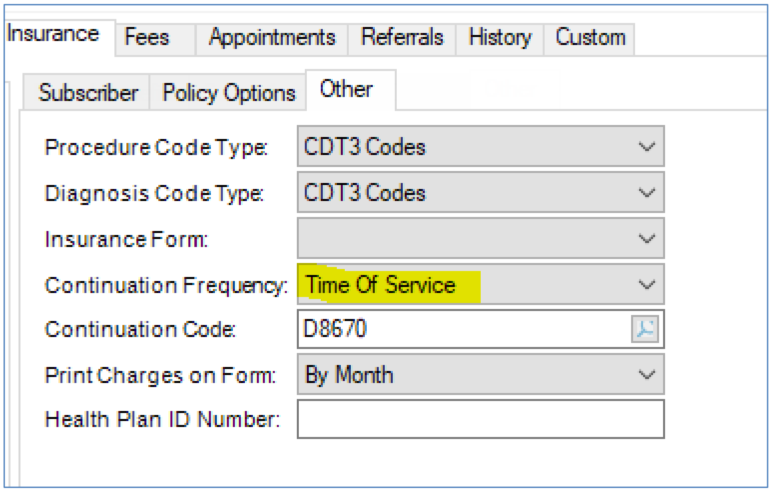


Once you have set up quick notes, you can access them and place them via the **Quick Note** button on the **Insurance Claim** dialog box, **General** tab, **Printed Paper Comment** and **Full Electronic Comment (Not Transmitted)** list boxes.

- You now have the option to save an employee's signature on file for insurance claims. From the **Edit an Employee** dialog box, select one of your providers, and add a signature for that doctor. When you print a claim, the words "signature on file" will appear on the box for the doctor's signature.
- The **Procedure Code Type** field on the **Edit a Patient**, **Insurance** tab, **Other** sub-tab now defaults to the value entered for the **Default Code Type** field on the **Financia**l tab (**Tools→Options→Financial**).
- You can automatically submit continuation claims based on time of service (TOS). Enabling this requires that you:

  - Check a new field on the **Edit an Appointment Type** dialog box**: This** E**nqueues a TOS Ins Continuation Form** for those appointment types you need.

- Select **Time of Service** for the **Continuation Frequency** field on **Edit a Patient**, **Insurance tab**, **Other** sub tab.



Everything else works the same as normal claims: when the unbilled benefit amount reaches zero, no more automatic continuation claims are sent.

When you dismiss an appointment type with the **This Enqueues a TOS Ins Continuation Form** field checked, the continuation claim is added to the insurance queue.

You can also now filter the Insurance Claims queue by Time of Service Claims

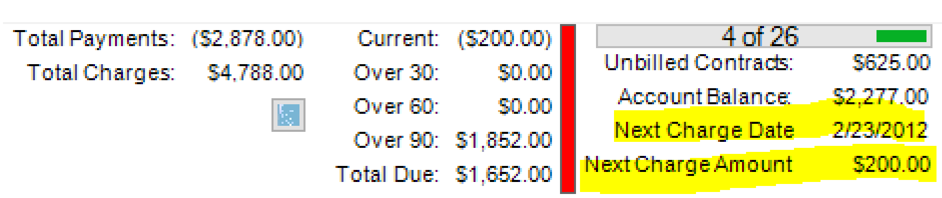
- We added an option, **Hide Additional CDT Codes on Initial Claims** to the **Edit an Employer**, **Employer Plans**, **Plan** tab. This is to address the need that some carriers must see itemized charges for their initial treatment fee, but not have CDT codes for other items appear on the Initial claim.
- We added three new options to the **Edit an Employer**, **Employer Plans**, **Plan** tab:

  - Accept Assignment/Create Ledger
  - When checked, all insurance forms for this employer will be configured to accept assignment and Dolphin Management will create an insurance ledger.
  - If you have existing patients linked to this employer and you change this setting, Dolphin prompts you to update these to match the setting on the Employer Plans, Plan tab.
  - Show Accept Assignment on Forms
  - When checked, all insurance forms for this employer will show the accept assignment status.
  - Show Secondary/Other Ins on forms
  - When checked all insurance forms for this employer will show the fields for secondary or other insurance.

Ledger

- We added two new fields to the header on the billing party ledger:

  - Next Charge Date
  - Next Charge Amount



  If the next charge is a down payment, the two fields read:
    - Next Down Pmt Date
    - Next Down Pmt Amount

Additionally a progress bar appears above the Unbilled Contracts field, if a contract has been started for the selected billing party and patient.

These fields are hidden if no next charges exist or down payments exist for the current ledger.

- The tool tips for the payment plan and recurring payments icons now include next scheduled payment date and next payment amount.
- When you print an FSA Statement from the Ledger (Print→Print Flex Plan), For Othodontics prints in the upper left.
- We added an option, **Print a Statement** to the **Print** tool bar button. That opens a screen where you can specify which future contract charges you want to include on the printout.
- We added a new **Correspondence** toolbar button to the **Ledger** dialog box with three options: **Add Letter**, **Send SMS Message**, and **Send Email Message**. If the patient has no SMS phone number or Email address on file, the **Add Letter** toolbar button appears instead of the **Correspondence** button.

Letters

- We added the following new letter tokens:
  - LastRecurringPaymentDate - the scheduled date of the last recurring payment (on or before today)
  - LastRecurringPaymentAmount - the amount of the last recurring payment (on or before today)
  - NextRecurringPaymentDate - the scheduled date of the next recurring payment (after today)
  - NextRecurringPaymentAmount - the amount of the next recurring payment (after today)

  These tokens return data for the selected patient or billing party, providing the recurring payment is associated with a started contract or configured as a stand-alone payment plan with no associated contract. If the patient or billing party has more than one contract, these tokens still return the date of the closest recurring payment, regardless of the treatment or contract selected.
- We added the following new letter tokens to use in SMS and Email appointment reminders and appointment scheduled templates:
  - AppointmentLocationCity – the city associated with the appointment's assigned location
  - AppointmentLocationPhoneNumber - the first phone number associated with the appointment's assigned location
  - AppointmentLocationSmsNumber - the first phone number that is marked "Use for SMS" for the appointment's assigned location
- We now prompt you if you want to add a doctor as a referral out for a patient if you add a letter regarding a patient to a doctor who is currently not a referral out for that patient. If you choose to do so and the patient has no other doctors listed, this doctor becomes the default referral out for this patient.
- We added two ways to access quick notes (described under Global) from letters:
  - Edit→Communications→Quick Letter Notes
  - From the Letters dialog box, Options→Setup Quick Letter Notes

OrthoBanc Setup Wizard

We added a new field**, Account Description** on the **Existing Provider Account Setup** screen, where you can enter a description or location for the provider account. This information is added to the new **Description** column on that screen.

Patient Information

- The order of the toolbar navigation buttons is now consistent across the following patient-centric dialog boxes:
  - View a Patient
  - Edit a Patient
  - Ledger
  - Treatment Card
  - Documents
  - Patient Comments
- You can now filter by chat messages on the **Edit a Patient**, **History** tab. For each chat message listed, there is a **View** button, which you can click to view the message thread associated with the chat message. You can only view messages between you and the patient, unless you have the appropriate application right (described in the next bullet).
- We added a new application right, **View All Patient-Related Chat Messages in Patient History**. This right is not granted to anybody by default. If you do not have this right (in the Patient category), the message "**You do not have rights to view this chat message**" would appear instead of the **View** button.
- The patient **History** tab, **View** pull-down menu has a new option: **Online Activity**, on which you can filter. The following patient-activities will be logged as online activities:
  - For practices using Online New Patient Forms, when patients add themselves via online forms or schedule their first appointment.
  - For practices using MyOrthodontist, when patients or billing parties update demographics, appointment preferences, schedule appointments, or submit a signed document.
- We added a **Questionnaire** button to the **Edit a Patient** tool bar. If you have Super Questionnaire enabled, click this button to open a questionnaire for that patient; if you do not have Super Questionnaire enabled, the standard questionnaire opens for that patient.
- There is now a tooltip over the birthday cake icon that displays the patient's age or the age he or she will be on their next birthday.
- We added new information to the **Description** column for SMS messages on the **Edit a Patient**, **History** tab. We now include the date and time for sent, received, and "to send" SMS messages. Additionally, we include the message type (either General or Appointment Reminder).
- We changed the **Doctor** label at the bottom of the **Add a Patient** dialog box to **Non-Referring Doctor**, for clarification purposes.

Patient Comments

- We added a right-click menu to the **Text** column contents in **Patient Comments**:

  - **Cut** (available for comments entered today only) to cut the current selection and add it to the Windows clipboard.
  - **Copy** to copy the current selection to the Windows clipboard. (This works for historical comments as well as current.)
  - **Paste** (available for comments entered today only) to paste the contents of the Windows clipboard to the current comment.
  - **Select Al**l to select all text in the comment you are editing.
  - **Create New** From This Comment to copy the selected text into a new comment with today's date. (If you have highlighted some of the text, only the highlighted text is added to the new comment).

- We added a new **Correspondence** toolbar button to the **Patient Comments** dialog box with three options: **Add Letter**, **Send SMS Message**, and **Send Email Message**. If the patient has no SMS phone number or Email address on file, the **Add Letter** toolbar button appears instead of the **Correspondence** button.

Patient Sign-in

The Patient List sign-in method now lists patient appointments in status Scheduled or the first GPS status your practice uses.

Reports

- For our Australian customers, we updated the Australian Charge Receipt report to include the tooth number in the description section.
- We added a new report, Patient Team Assignments for Active Patients, which lists all active patients, their assigned location, team, and status.
- We added a new report, Credit Cards Expiring with Recurring Payments, which shows which credit cards on file are set to expire before the next recurring payment date (within the selected report date range).
- We added a new report, Contracts with no Recurring Payments, to the Financial category.

- When you email a report from DIRT, the **Email Message Setup** dialog box now includes a field for **Default Billing Party**.

- We added the following fields to the Patient report category, Financial Fields field category in DIRT:

  Billing Party's Next Payment Plan Payment Amount
  Billing Party's Next Payment Plan Payment Date
  Billing Party's Next Recurring Payment Amount
  Billing Party's Next Recurring Payment Date
  Default Billing Party's Next Payment Plan Payment Amount
  Default Billing Party's Next Payment Plan Payment Date
  Default Billing Party's Next Recurring Payment Amount
  Default Billing Party's Next Recurring Payment Date

- We added the following fields to the Treatment (beta) Field Category:

  Field: Treatment Discount Description
  Field: Treatment Discount Code
  Field: Treatment Discount Amount

- To support the Teams feature described under Schedule, we added the Patient's Default Team Name field to the Patient report category, Patient field category in DIRT.

- We added the following fields to the Patient report category, Billing Party, Default Billing Party, Default Doctor, and Patient field categories in DIRT:

  Billing Party's Primary SMS Phone Number
  Default Billing Party's Primary SMS Phone Number
  Default Doctor's Primary SMS Phone Number
  Patient's Primary SMS Phone Number

  When more than one SMS phone number is stored, these fields pull the first SMS number listed.

- We added an Employee report category to DIRT, and it contains one field category, which is Employees. The Employees field category contains the following fields:

  Employee Is Assistant
  Employee's BirthDate
  Employee's City
  Employee's City State Postal Code
  Employee's Email
  Employee's First Name
  Employee's Full Mailing Address
  Employee's Gender
  Employee's Greeting
  Employee's Group Membership
  Employee's Hire Date
  Employee's ID (Guid)
  Employee's Initials
  Employee's Last Login
  Employee's Last Name
  Employee's Last Password Change
  Employee's Login Name
  Employee's License Number
  Employee's Name (First Last)
  Employee's Name (Last First)
  Employee's Postal Code
  Employee's Primary Phone Number
  Employee's Primary SMS Phone Number
  Employee's Salutation
  Employee's SMS Name
  Employee's State

Employee's Street Address
Employee's Termination Date
Employee's Type
This Is A Deleted Employee

- With the addition of the fields listed above, you can now send mass letters, emails, and SMS messages from a DIRT report to your employees.
- We made the following changes to the Hummingbird reports:
  - The Morning Huddle Report:
    - The Practice Goals section uses columnar format.
    - # of Starts column now pulls data from the treatment card.
    - The column order has changed to: Next Appt. Available, Today’s, Yesterday’s, and Goals
    - List (detail) includes all patients who are past due
  - The Treatment Coordinator Report Summary includes a section called Exams this period, which is now based on visits logged in the treatment card.
  - We added a new Hummingbird category, Allergy Alert Types, to contain all custom alert types that cover patient allergies.

    The Hummingbird Category, Treatment Starts, should include the following:

    - Full Case Treatments
    - Limited Treatments
    - Phase I Treatments
    - Sure Smile / Insignia Treatments
    - Invisalign Treatments.
  - Added two new reports, Patients in Status – New Patient Added With No Next Proc Date, and Patients in Status – New Patient Added with Next Proc Date, which replace the Patients in Status – New Patient Added report.
  - We added a **Status Reports** tab to the **Hummingbird Setup** dialog box, so you can now generate Hummingbird reports based on the patient status or statuses you select.
  - We added the column Patient Current Status, and the Patients in Retention indicating Deband Date report now uses the Hummingbird category: Phase II and Full Retention Status.
  - The Patients Scheduled Sorted by Appointment Type Code report is now a DIRT report.
  - We made improvements to the Specific Appointment Type Codes Scheduled in the Future for Range of Days report, and you can now send the results to DIRT.

Schedule

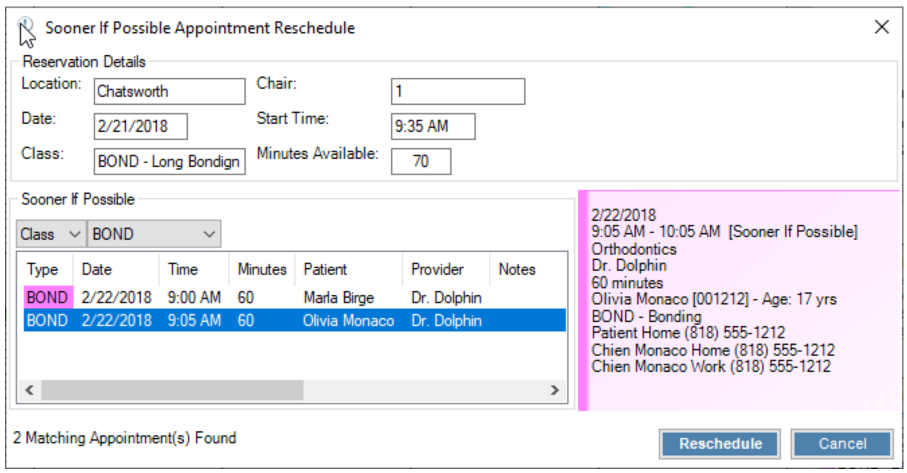
- You can now track how an appointment was scheduled. On the **Appointment Status History** screen, there is a new field, **Appointment Source**, which contains one of the following:
  - **Dolphin Management** (for appointments scheduled within Dolphin Management).
  - **3rd Party Integration** (for appointments scheduled via a 3rd-party integration.
  - **MyOrthodontist** (for appointments self-scheduled by a MyOrthodontist user)

- **Online New Patient Form** (for appointments self-scheduled by new patients via Dolphin Online New Patient Form service)

Additionally, new icons appear on the scheduled appointment that indicate how the appointment was scheduled.

 for Online New Patient Forms  for MyOrthodontist.

- For practices licensed for MyOrthodontist, you can now prevent patients from scheduling appointments of certain types. From the Edit an Appointment Type dialog box, there is a new check box, Disallow patient self-scheduling, which, by default, is not checked. If you check this box for a specific appointment type, and you have enabled Next Visit Scheduling for your MyOrthodontist users, patients cannot schedule a Next Visit appointment of this type.
- We enhanced the **Sooner if Possible Appointment Reschedule** dialog box. Now when you click on an appointment, an appointment summary appears in a panel on the right-side of the list box:



- We added a **Wks** column to the **Checkout** wizard, Appointments step. This column shows the value entered in the **Weeks Out** column on the patient's treatment card, Next Visit entry.

- You can now add an **Alerts** column to the **Patient GPS** pane layout.

Patient GPS->Setup->GPS Panes Setup->Edit/Add->Columns tab

Any alert types that have been configured as visible in the Scheduling Grid **(Alert Type**->**Modules** tab) will be displayed in the **Alerts** column. Additionally, you can mouse over the alert to see a tool tip.

- We added a new option to **the Light Bar Status** dialog box: **When doctor checks into this status for an appointment, automatically switch other appointments in this status for the same doctor to the following status:** In addition to this option is the **Auto Status** drop-down field where you can choose any other lighting status. For example, if you enable this option for the Doctor Treating status, and the drop-down field is set to Assistant Treating, and the doctor moves from Chair 1 to Chair 2 (where the assistant is treating), the following will occur:

  - When the doctor switches the light bar status for Chair 2 to Doctor Treating, the system changes the status on Chair 1 to Assistant Treating.
  - The Assistant assigned to the chair will be switched to the last known assistant working on the appointment (based upon previous lighting status changes), and the Doctor assigned to the chair will not change.

- We added a new application and employee right, **Light Bar – Change Priority**, which is assigned to no employee, by default.

  When given this right, an employee can change the priority for a chair on the light bar in one of the following ways:

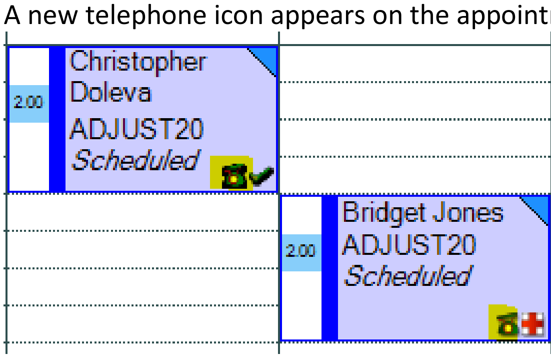
  - Right-click and select **Change Priority**
  - Double-click on the chair on the light bar

  If more than one appointment has an assigned priority number, a pop-up bar appears, which you can use to change the priority of the selected chair. This causes the other appointments to be re-ordered based on their prior priority order.

- You can now track and view patients for whom you left a message to confirm their appointments. You can access this:

  - In **Scheduling**, right-click on a scheduled appointment, and select **Left Message**.

    A new telephone icon appears on the appointment:

    When you hover over the appointment, the date and time you logged the call is also shown.

  - In **Appointment Reminders**, right-click on an item in the list, and select **Left Message**.
  - On the **Unconfirmed** tab in **Scheduling**, the date and time you logged the call is shown.

  Additionally, you can track this in DIRT, using these new fields in the Schedule category: Appointment Left Message, and Appointment Left Message Date and Time.

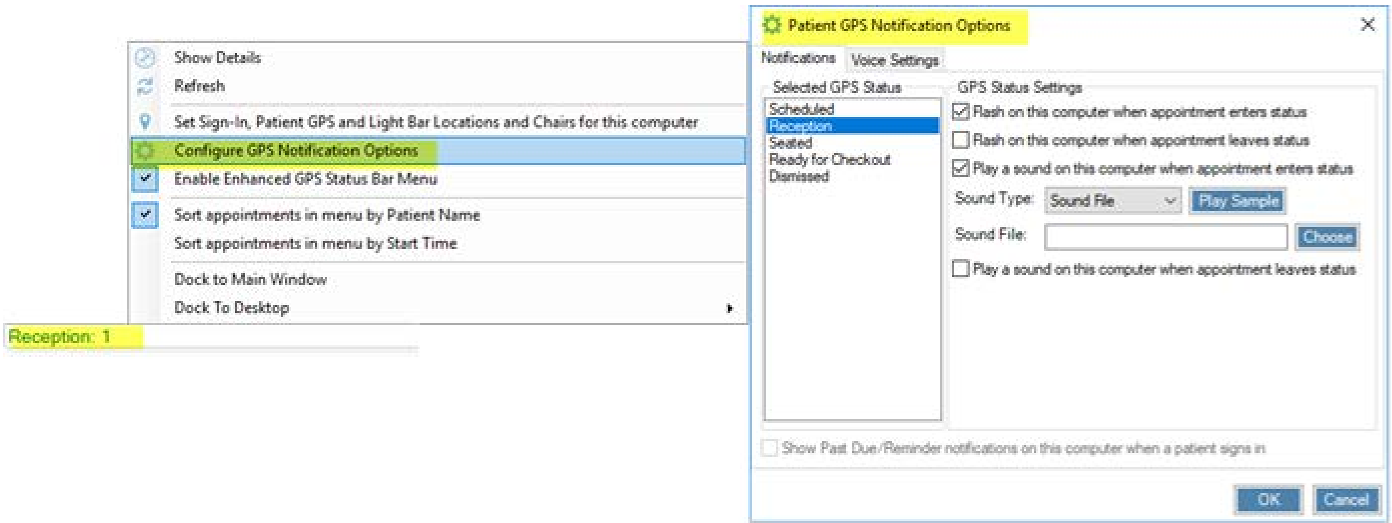
- When you reschedule a confirmed appointment (right-click, drag and drop, etc.), Dolphin Management now prompts "Is this appointment still confirmed?" If you click Yes, the appointment retains its confirmed status in its new slot. If you click No, you need to confirm the appointment again after rescheduling it.
- When you reschedule an appointment for a different time on the same day, the prompt now reads "Since you've placed this appointment on the same day, do you want to mark this appointment as patient rescheduled?"
- The **Options** drop-down menu includes the following new, per-computer options (off by default):

  - **Hide Patient Image in Appointment Tooltips**: When activated, the patient image no longer shows in mouse-over scheduled appointment tooltips.
  - **Show patient total/past due icons on appointments**: When activated, a currency symbol appears on scheduled appointments (red when patient's past due amount is greater than zero, green when patient's total due is greater than zero, and blue when patient's total due is less than zero).

- **Show patient total/past due balances in appointment tooltips**: When activated, any non-zero past due or total due balance amount shows in mouse-over tooltip. Users must have the **View Financial Balance Summaries** application right to use this option.

The **Schedule Printing Options** dialog box has a new option, **Number of Days to Print**.

- We changed the **GPS Status Bar Options** menu as follows:



  - Right-click any appointment status on the GPS Status Bar to open the options available to you.

  - You now access the "Flash" options via a new menu option—**Configure GPS Notification Options**, which opens the new **Patient GPS Notification Options** dialog box. This contains two tabs: **Notifications** and **Voice Settings**.

    The **Notifications** tab contains the "Flash" settings previously on the GPS Status Bar Options menu, but now these settings are per computer. Additionally, there are options to **Play a sound on this computer when appointment enters status** and **Play a sound on this computer when appointment leaves status**. These options are available for appointment statuses: Scheduled, Reception, Seated, Ready for Checkout, and Dismissed. When you enable the **Play a sound** options, you can choose between a spoken voice and a custom sound file in .WAV format.

    The settings for Spoken Voice and Sound File are global for the practice, however, whether to play sound notifications is per computer.

  - The **Voice Setting**s tab is where you specify the gender, volume, and speed of spoken notifications.

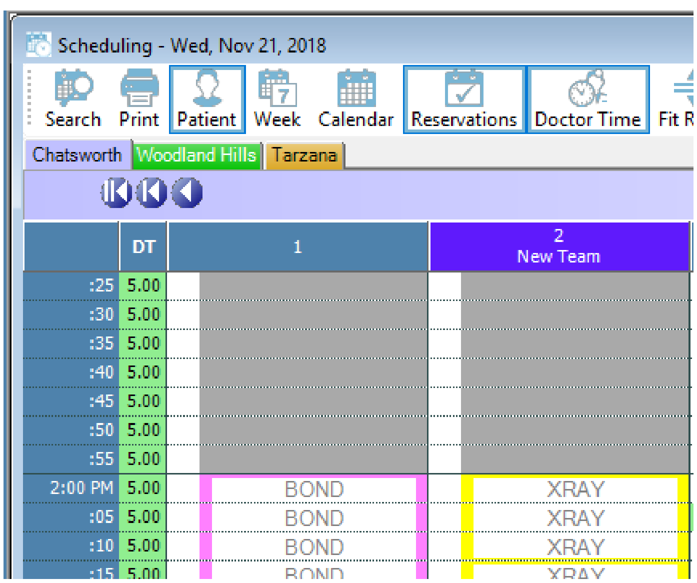
- The text used to show appointment status in Patient Navigator, GPS bar (at the bottom of the schedule) and appointment history, is now colored according to the assigned status color.
(Edit→Schedule→Appointment Statuses)

- The **Appointment Status History screen** now has four new fields:

    - **Confirmed**-- whether the appointment was confirmed or not
    - **Date/Time Confirmed**— (if applicable)
    - **Confirmed Via**—how the appointment was confirmed: Email, 3-rd Part Integration, Schedule, SMS, MyOrthodontist, HouseCalls, or N/A
    - **Left Message**—date/time your practice left a message regarding the appointment (if applicable)

    Additionally, we added **Assistant** and **Orthodontist/Provider** columns to the **Light Bar Status Changes** section.

- We added a new check box on the **Appointment Reminders→SMS Message** tab**→ Scheduled Message** tab: **Send message when appointment scheduled**. This instructs Dolphin Management to send this message whenever an appointment is scheduled. If you want to send a different message or not send any message for a specific appointment type, you now specify that on the **Edit an Appointment Type** dialog box, described under **Edit Menu** earlier in this document.
- The **Enable Scheduled Reminder Message** check box on the **Appointment Reminders→Email Message** tab works the same way. When checked appointment reminder emails are sent whenever an appointment is scheduled. If you do not want this message to go out for certain appointment types, you now specify that on the **Edit an Appointment Type** dialog box, described under **Edit Menu** earlier in this document.
- If an appointment reminder scheduled via Email or SMS is referring to an appointment that was cancelled or rescheduled, that reminder message moves to an Auto Delete status.
- You can assign patient teams to chairs on your schedule templates. On the **Schedule Template** dialog box, click in a column, and select **Assign Patient Team to Column(s)**. Then apply this template to your schedule. The Column heading changes to match the color associated with the team, and the name of the team appears below the column or chair name:

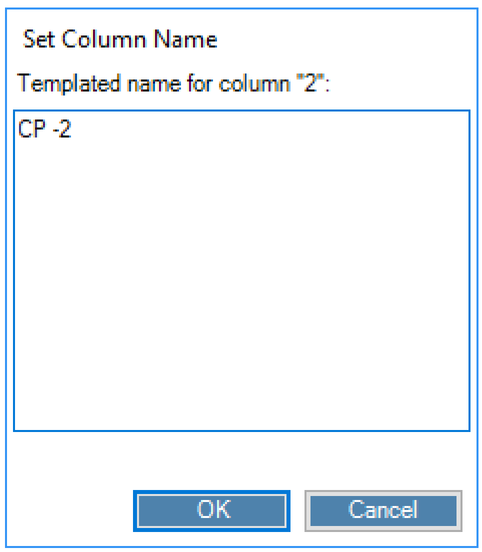


- The **Search Schedule** now includes a **Team** field for those practices that are using the patient teams feature. The new, **System Options**, **Scheduling** tab field **Default Appointment Search Team to Patient**

Team corresponds this feature. When selected, the appointment search defaults to the patient's assigned team, if he or she has one.

- For chairs assigned to patient teams, the Light Bar, and Patient GPS (pane layout) will show the team color. Patient must be in a seated status.
- A green highlight appears on patient appointments in GPS when the following conditions are met: 1) the current time is earlier than the appointment start time; 2) the patient signed in early, and the number of minutes early is more than or equal to what is defined under Edit→Practice→Locations→Options→Minutes before early message.

- The **Schedule Templates** list now shows the color assigned to each template.
- We changed the way you rename columns on schedule templates. In previous releases, you clicked the column header and typed in the name. Now you right-click the column header and select **Set Column Name(s)**. Enter the new name in the **Set Column Name** dialog box:



You also have the option to right-click on a column and select **Reset Column Name(s)** to revert that column to its default name.

- When you reschedule an appointment, Dolphin now prompts you with the same pop-window that appears when you make a new appointment. If you have set up automated appointment reminders via SMS and/or Email, those settings are honored for the rescheduled appointment.

Scheduled Jobs

We added new settings options to the Send Email Messages scheduled job and the Send/Receive SMS Messages scheduled job.

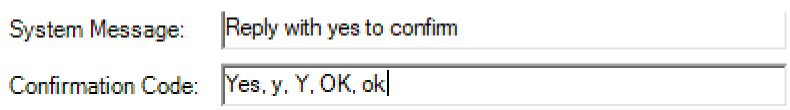
- When you click the **Settings** button on the Send Email Messages job, the Email Send/Receive Settings dialog box opens. Here you specify the user under which the job should run and the maximum number of days past after which an email is too old and should not be sent. The default is 21 days.
- When you click the **Settings** button on the Send/Receive SMS Messages job, the SMS Send/Receive Settings dialog box opens. Here you specify the user under which the job should run and the maximum number of days past after which an SMS message is too old and should not be sent. The default is 7 days.

SMS/Email Manager

We added a new message status, **Auto Deleted**, which you can filter on. This status is used for messages associated with appointments that are older than today or have been cancelled or rescheduled.

SMS Messaging Center

- Patients and or billing parties can now confirm to the practice when they receive an appointment reminder, and you can specify what confirmation codes they can us via the new **Confirmation Code** field.

  Any of the comma-separated characters will work when the patient/billing party responds to the appointment reminder SMS message.

  Main→Appointment Reminders→SMS Message tab→***Reminder Message*** sub-tab

- You can create SMS groups of employees based on DIRT reports that use the new data fields from the Employee report category (described under Reports, above).

- When editing or creating an SMS Template, you now have the option to specify when the template should be available:

  - General means this template is available whenever you want to send a general SMS message. This option includes frequency settings.
  - Reminder means this template is available whenever you want to send appointment reminder SMS messages.
  - Scheduled means this template is available whenever you want to send messages that an appointment has been scheduled.

Super Questionnaire

There is a new option on the **Super Questionnaire Setup**, **Options ->Preview Online** menu: **Fixed Form Layout**, which is how it is set up in Dolphin Management. If you also have a license for New Patient Online Forms, you will also see the **New Patient Online Form** option.

Time Clock Viewer

We have enhanced the **Time Clock Viewer**:

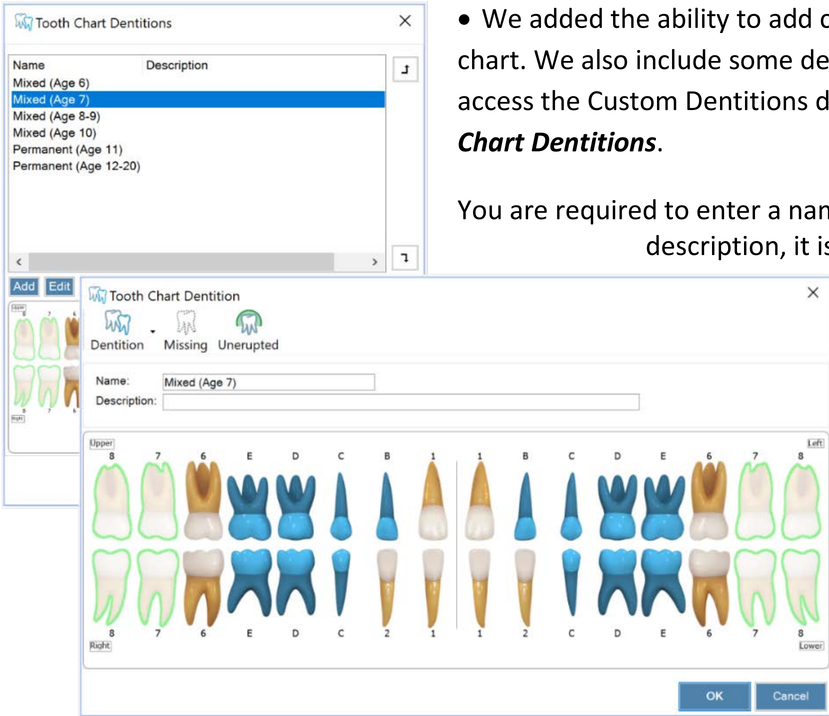
- The **Add** tool bar button has been renamed to **Add Entry**.

- We added an **Add Time** tool bar button, which is available to users who have the application right to edit time clock entries.

- This button opens the new **Add Bulk Time Clock Hours** dialog box.

- You can highlight multiple days in a row on the **Calendar View**, and these will be reflected on the **Add Bulk Time Clock Hours** dialog box.

Treatment Card

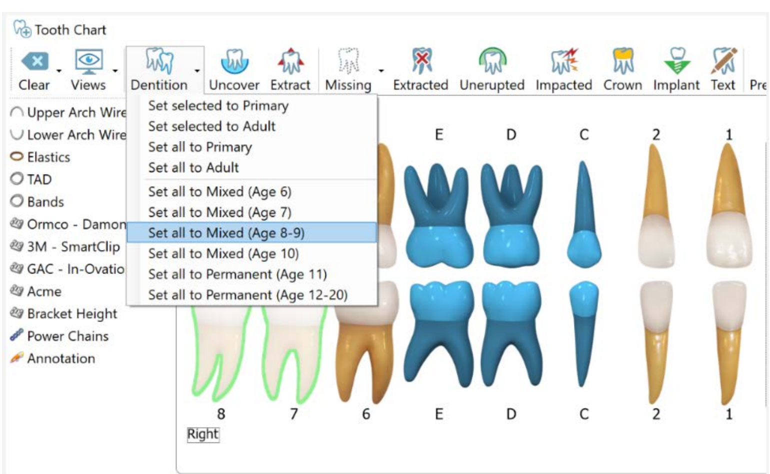


- We added the ability to add custom dentitions to the interactive tooth chart. We also include some dentitions by default, which you can edit. To access the Custom Dentitions dialog box, click: ***Edit→Treatment→Tooth Chart Dentitions***.

You are required to enter a name to each new dentition. If you enter a description, it is used as a tooltip! Each tooth in a custom dentition can be marked as Primary, Adult, Missing, or Unerupted. If you edit one of the Dolphin-provided dentitions, and you want to undo your changes, select the dentition, and click the **Restore Defaults** button.

We added a **Dentition** button to the **Tooth Chart**, which replaces the **Primary** toggle. Click the **Dentition** button to access any custom dentitions you create as well as the dentitions provided with this release:

- Mixed (Age 6)
- Mixed (Age 7)
- Mixed (Age 8—9)
- Mixed (Age 10)
- Permanent (Age 11)
- Permanent (Age 12—20)



From the **Tooth Chart**, select a single tooth, then click the **Dentition** button, and **select Set Selected to Primary** or **Set selected to Adult**. The other options are applied to all teeth, the way you defined the dentition in the **Tooth Chart Dentition** screen.

- You can now apply **Extract** or **Uncover** to teeth in **Tooth Chart Prescriptions**.
- We added the option, **Chat Messages** to the **Options→Show Entry/Field Types** cascade menu in **Treatment Card**. When activated, any chat messages in which the patient was tagged will be displayed in

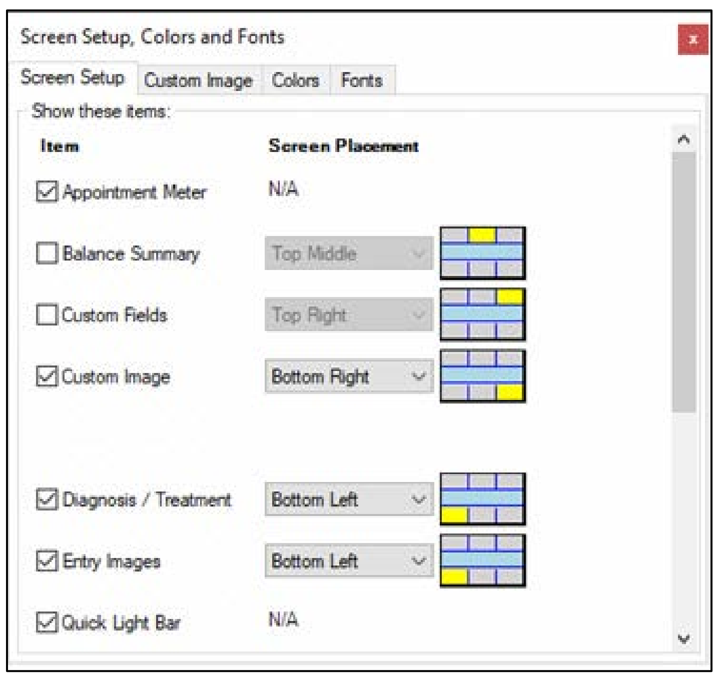
the treatment card grid. A warning message is displayed if you do not have the application right to view chat messages.

- The **Appts** button, which previously opened the **Patient Appointments** dialog box where you could view the patient's appointment history, now includes a drop-down menu with the following options:
  - **Appointment History** – same functionality as before
  - **Search Schedule**—open the **Search Schedule** dialog box with this patient's information
  - **Schedule**—open the **Scheduling** dialog box with this patient's information completed in the patient area in the lower left corner.

- We added two new items to the **Screen Setup** tab:

  - **Balance Summary**—the patient's balance summary, which previously required you to set up a custom treatment card header. If you check this option and you had previously configured a balance summary for your custom header, the custom balance summary will no longer show.
  - **Custom Fields**—any treatment card custom fields, which previously required you to set up a custom treatment card header. If you check this option and you had previously configured custom fields for your custom header those fields will no longer show in the treatment card header

- You can now customize the placement of treatment card items on the **Screen Setup** tab. You can choose from 6 placement regions (top left, top middle, top right, bottom left, bottom middle, and bottom right) for all items on the **Screen Setup** tab except **Appointment Meter** and **Quick Light Bar**. Those items can be shown or no-shown only.



- You can now use the following characters when entering start and end date in the Weeks Out (W/O) field for Next Visit entries.

  - Slash (/) 5W/9W (5 weeks out start date and 9 weeks out end date)
  - Backslash (\) 2W\3W (2 weeks out start date and 3 weeks out end date)
  - Comma (,) 5W,7W (5 weeks out start date and 7 weeks out end date)

  You can use normal shortcut date notation, such as 1W3D, 3M, 1Y-1D, for example

  As entered, these date ranges will appear in the following places as projected:

  - **Next Visits** tab in patient navigator
  - Checkout wizard
  - Treatment Card (providing the Show calculated or scheduled next visit date option is active for the W/O field)

These date ranges will prefill the Start Date and End Date fields for schedule searches performed for Next Visits in the Checkout wizard. Any end date range specified via this enhancement will override the weeks after setting of MyOrthodontist **Next Visit Scheduling**.

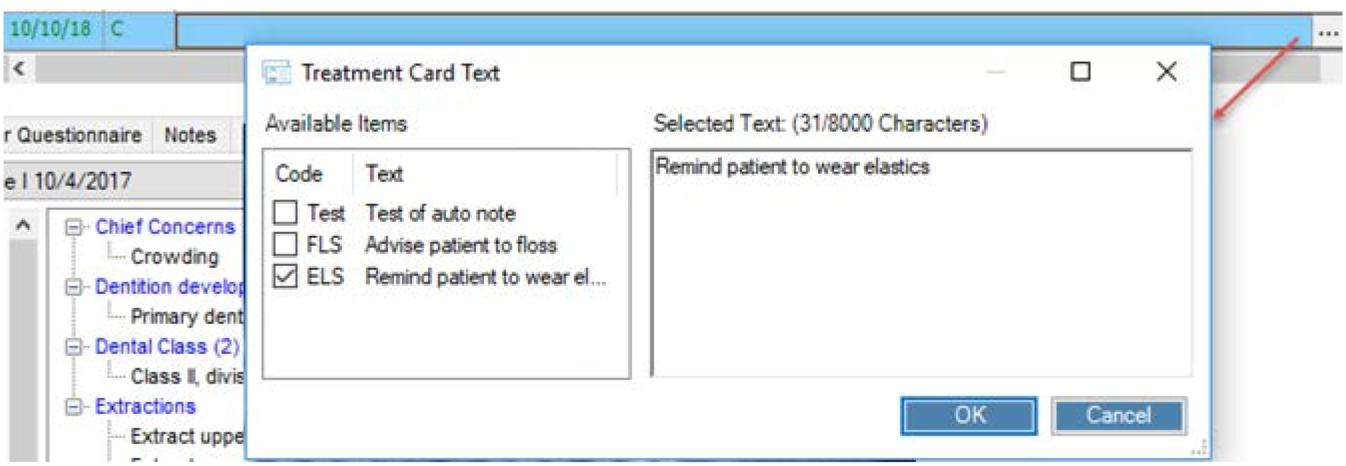
- Dolphin now integrates with EasyRx via the **Treatment Card Setup--> Integrations** tab. EasyRx customers should contact EasyRx directly for instructions and a required, customer-specific file.

- We now check before allowing you to access **Treatment Card Setup**, preventing it if another user is currently editing the treatment card setup, or if another user has a patient treatment card open.

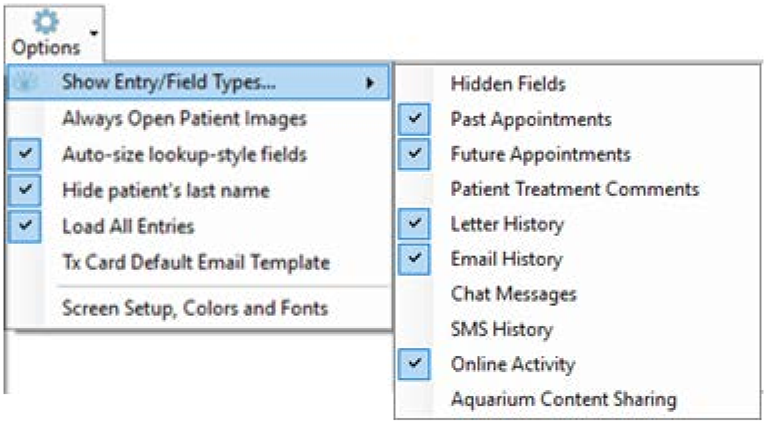
- We added a new field type, **Last Appointment Weeks**, **to Treatment Card Setup**. This field automatically populates when new Visit and Emergency entries are logged, and it shows the number of weeks since the patient's last dismissed appointment. If the field shows N/A, there is no prior dismissed visit, or the visit was entered prior to this release.

- Letters generated from the treatment card (**Treatment Card Field Auto-Letter**) can now include the patient's tooth chart.

- You can now create custom lookup items for treatment card comment entries. You define these on the new Quick Comments tab on the Treatment Card Layout dialog box. If staff members find themselves typing the same information in a treatment card comment, they can use these new lookup items instead. You set up custom lookup items for each treatment card layout you use. When adding a treatment card comment entry, click the ellipses to open the list of custom lookup items:



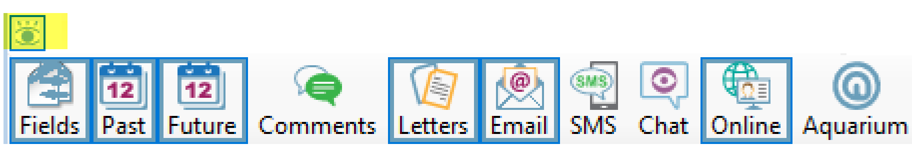
- We added the **Show Entry/Field Types...** submenu to the **Treatment Card**, **Options** menu, and moved the following "Show" Options previously part of the **Options** menu to the new sub-menu. Additionally, we added two new "Show" options: **Hidden Fields** and **Hidden Entries**.



Any fields marked **Field is hidden by default** in the **Treatment Card Setup**, **Treatment Card Field-->Field** tab are hidden when you open the patient Treatment Card. To temporarily see these fields on the Treatment Card, select **Options→Show Entry/Field Types…→Hidden Fields**. You can specify how long hidden fields display when you activate the "Show" option. On the **Treatment Card Setup**, **Options** tab, enter the number of minutes in the new **Hidden Fields Auto-Hide Minutes** field.

- For practices licensed for MyOrthodontist and/or Online New Patient Forms, we added the option, **Online Activity** to the **Show Entry/Field Types** cascade menu in **Treatment Card**.

- We added a Show Entry/Field Types button at the lower left corner of the treatment card grid. Click this button to open the floating toolbar shown below. The buttons on this toolbar correspond to the options on the Options→Show Entry/Field Types sub-menu described above. Click anywhere off the toolbar to close it. These options are specific to the logged-on user.



- When you drag and drop a planned visit item to the treatment card to create a NV entry, Dolphin Management completes the WO column with 0W if the calculated weeks out is less than or equal to zero. This indicates that you should schedule the visit today or ASAP. In previous releases the WO field remained blank in this scenario. Additionally, if the treatment card was set up with the **Validate Next Visit entrie**s option checked, previously Dolphin Management required an entry in this field to save the entry.
- On the **Treatment Notes** dialog box, you can now delete either the highlighted item or one or more checked items at once. Previously you could delete one item at a time only. The notes on this dialog box are used for treatment card and treatment plan notes. You access it by clicking on the **Lookup** button on the treatment card or plan **Notes** tab.

- We changed the message that appears when you attempt to save a treatment card, and a Visit, Emergency or NV entry is missing a required field:
  - If the field is required but is currently hidden, the message reads:

    "*field* is a required field but is currently hidden from view. You will need to first show hidden fields, then enter a value for this and any other required field(s)."
  - For all other non-hidden required fields, the message reads:

    "*field* is a required field. Please enter a value for this and any other required field(s)."
- We improved the scaling of images associated with treatment card integration entries, such as EasyRx.

Zuelke Financial Expert

At a customer request, we added an extra column, D, for the orthodontist's initials. This column appears next to the TC column on the Cast Start Tracking Form for A, B and C Patients.