

What's new in

# Dolphin Management

# 9.0

Welcome to Dolphin Management 9.0!

This document provides an overview of many of the new features that have been added since version 8.

Dolphin Management 9 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](http://www.dolphinimaging.com) for complete technical specifications. Dolphin Imaging 11.9 and Aquarium 3.4 are recommended for use with Dolphin Management 9

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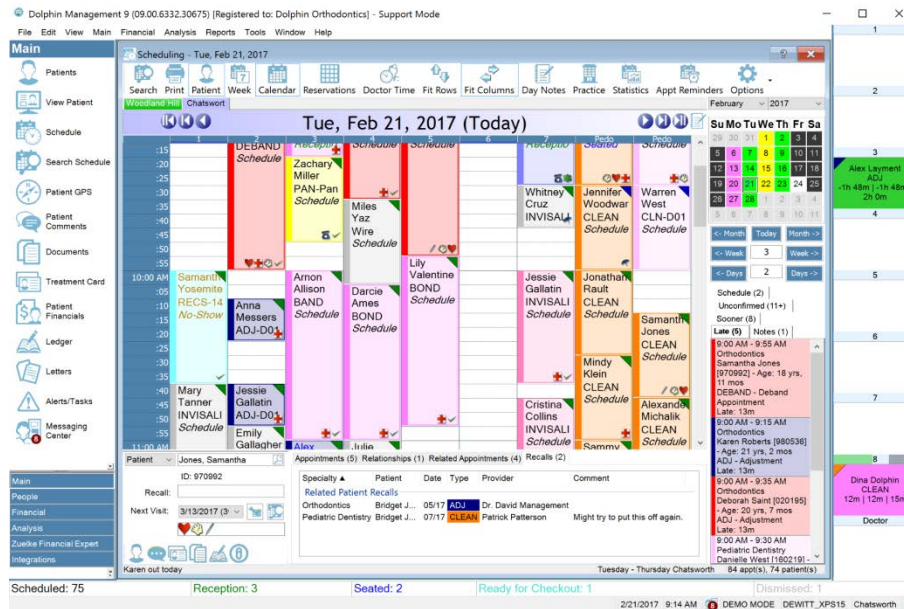
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## New Management Features in 9.0

### ***New Industry Standard Look and Feel***

Dolphin is rebranding itself with a new, unified look and feel, based on the Material Design industry standard. One of the advantages of this is that it brings more emphasis to practice-specific colors, as shown in the Schedule screen shot below.



### ***New, Streamlined Way to Assign Employee Rights***

This release of Dolphin Management includes **User Roles**, which allow you to quickly assign specific application rights to employees, based on the role they have in your office. For example, you can assign the role, Financial, to the staff member in charge of billing. Using the new **Manage User Roles** feature, you assign pertinent application rights to the Financial Role. Any employees defined as Financial will inherit these application rights. You can then go into **Employee Rights** and further customize each employee's access to Dolphin features as needed.

**Edit → Practice → Employee Roles** (assign and define staff roles)

**Edit → Practice → Employee Rights Overrides** (customize rights for individual employees that override any rights granted or denied by the assigned role)

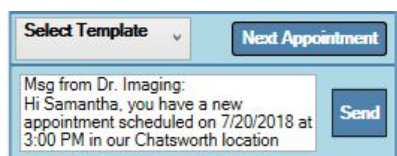
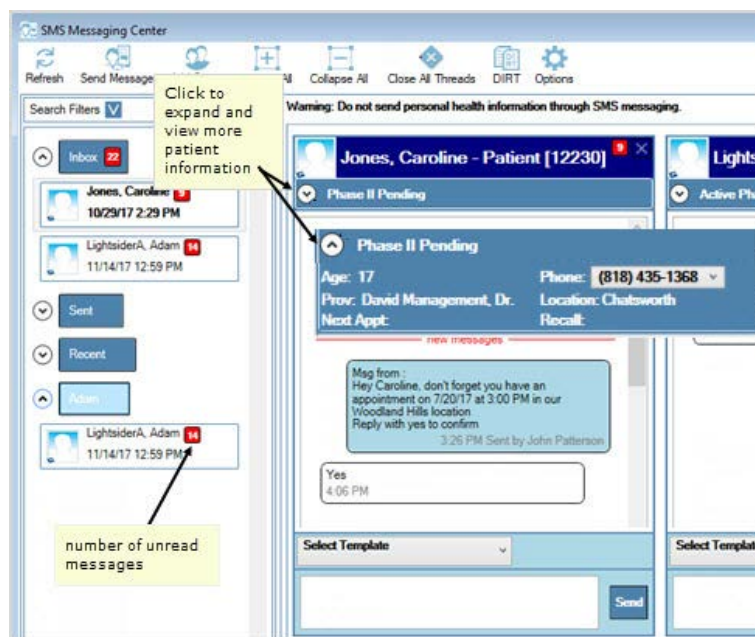
Please note the following:

- Several roles are shipped with Dolphin Management, but other than the Administrator role, these do not have rights assigned. The Administrator role has all rights assigned by default, and you cannot change it. However you can customize individual rights for any employee assigned the Administrator role.
- Once you assign a role to an existing employee, Dolphin gives you the option to keep or reset whatever rights that employee had assigned in previous releases.
- You can assign more than one role to employees, and rights granted in one role override rights denied by the other role.



## New 2-Way SMS Feature Available

This release of Dolphin Management V9 includes 2-way SMS, if your practice is licensed for it. The new **SMS Messaging Center** provides a central place to manage incoming and outgoing SMS messages:

- Send/receive two-way instant messages between the practice and entities in your database, such as patients, billing parties, doctors, and your employees.
- View one, two, or more message threads in separate windows, with quick access to patient information on each window.
- Copy/cut and paste contents from one message thread to another.
- Resend a message
- Switch entities during a “conversation” if more than one entity uses the same SMS phone number.
- Mark an inbound message as read or unread for you, all employees, or employees you select.
- Receive and reply to an SMS message from an unknown contact, and add that number to an existing contact, or create a new patient record with that number.
- Send, receive and view all sent and received SMS messages.
- Quickly access patients and patient-related program features from a patient thread or billing party thread that has a patient in context.
- Create groups of entities to which you want to send SMS messages, either manually or by using a DIRT report.
- Send appointment reminders to patients who have a next appointment scheduled:



There are three ways for you to access the **SMS Messaging Center**:

- From the **Main** menu, select **Messaging Center**.
- From the Main Icon pane, click  Messaging Center
- From the status bar, click the  icon.

For more information, see the online help.

## Analysis Tools

- We added a new view, **Hummingbird Analysis** to **Practice Analysis**.
- We added a new view, **Scheduled Charges**, to the Practice Analysis. You access this on the **View** menu. This view shows all scheduled charges, both past and future.
- We added a new field to Practice Analysis, **Production Employee**, and we moved the **Amount** field to the last column. We removed the **Late Fee Amount** field from the production view.
- Practice Analysis now reports future scheduled charges, based on charges tied to appointments and appointment types in the schedule. Data from any date range beyond the time you run Practice Analysis will be included. For example, if you are running Practice Analysis in the middle of the month, and you select **This Month** as the filter, the analysis will include future numbers from today through the end of the current month. If you select **Month to Date** as the filter, future numbers will be excluded.
- Practice analysis now includes a breakdown of adjustment subtypes when you make adjustments that decrease total due from insurance companies. We previously showed adjustment subtypes for patients only; now we do the same for insurance.

## AnywhereDolphin

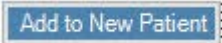
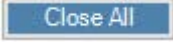
- We moved the **MyOrthodontist Login Verification Email Template** and **Invitation Email Template** group boxes from the **Defaults** tab to a new **MyOrthodontist** tab.
- We added two new group boxes on the **MyOrthodontist** tab to support new features in MyOrthodontist 4.0:
  - **My Elastics** includes an option to enable or disable **Tooth Chart View for Elastics**, which allows MyOrthodontist users to view their elastics placement on their tooth chart.
  - **Next Visit Scheduling** allows patients/billing parties to schedule their next visit if the oldest Next Visit treatment card entry is unscheduled.
  - You specify the search parameters:
    - **Max weeks before next visit to search** sets the number of weeks to begin the schedule search relative to the calculated next visit date.
    - **Max weeks after next visit to search** sets the number of weeks to end the schedule search, relative to the calculated next visit date.
    - **Max openings to offer** sets the maximum number of open schedule reservations the patient can see.
- We added the following options to the **AnywhereDolphin/MyOrthodontist Setup, MyOrthodontist** tab, **Location Settings** group box:
  - Return only reservations for the patient's assigned Orthodontist
  - When next visit minutes are not specified use:
    - Appointment type default minutes
    - Open reservation minutes
  - Next appointment message template  
You can edit the Next appointment message template, and we have added the following message tokens for that purpose:
    - MyOrthoNextApptLocation
    - MyOrthoNextApptMinutes
    - MyOrthoNextApptProvider
    - MyOrthoNextApptType
    - MyOrthoNextApptWeeksOut

- We added a **Push Notifications** tab to the **MyOrthodontist / AnywhereDolphin Setup and Defaults** screen. On this tab you can turn push notifications on or off to notify users that you have sent an online questionnaire, shared a secure document, or shared Aquarium media.
- We added an **Email** field on the **MyOrthodontist / AnywhereDolphin User Settings** screen. If the email on file for this user is different than the email shown in this field, an **Update** button appears on this screen. Click this button to update the email address associated with the user's AnywhereDolphin account with the default email address currently on file in the database. This provides another way to sync emails between Dolphin Management and AnywhereDolphin if a patient's email address changed prior to the enhancement described next.
- A patient's email address is updated in AnywhereDolphin and/or MyOrthodontist whenever you update that patient's email address in **Edit a Patient**.
- We added a new application right **Edit AnywhereDolphin/My Ortho Integration Setup**, which is granted to anyone with **Edit Menu** rights by default. This controls visibility/access to the option from **Edit-->Integrations** and the **Setup** tool bar button on the **Online Questionnaires** screen.
- On the **AnywhereDolphin / MyOrthodontist Setup and Defaults, Setup** tab, we replaced the **Remember This Password** option with the **Save password for** option, which includes two radio buttons:

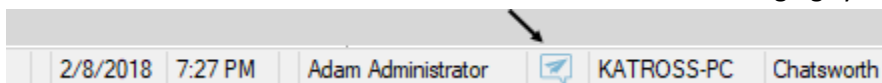
**My Login Only** is the default option, and it saves the password for the current user (same as the Remember This Password option)

**All Employee Logins**, when checked, saves one copy of the password in the database and prevents the AnywhereDolphin login prompt from appearing when an employee accesses a feature that requires AnywhereDolphin connectivity. This way the AnywhereDolphin password is kept secure from staff that should not have it, but those staff members can still use the connectivity when required.

## General

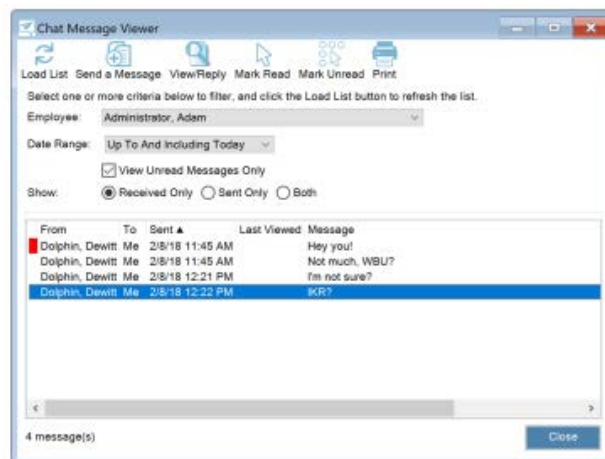
- If you have an optical scanner attached to the sign-in station, patients can now sign in using the new MyOrthodontist 4.0, Patient Badge feature.
- When a MyOrthodontist user scans in using the MyOrthodontist, Patient Badge feature, and the **Lookup a Patient** screen is open, that patient's information will now show in the lookup search results.
- We added two buttons to the **Incoming Call** dialog box:
  - For unknown incoming calls, the  button, when clicked, prompts you to set a phone type and enter a note. After you save the new number, the **Add a Patient** dialog box opens where you can enter new patient data to associate with this number.
  - The  button closes all **Incoming Call** pop-up windows if there is more than one.
- The **Employee Rights** dialog box now uses the same colors and legend as the **Edit → Practice → Employees → Security Overrides** tab.
- The **Help → Contents** menu now includes the keyboard shortcut for accessing online help: F1
- We improved the performance of the **Alerts/Tasks** screen when the criteria results in several hundred alerts returned.
- We improved the load speed of alert icons throughout the program.
- You can now alphabetize the list of employees in **Session Manager** -- Just click-sort on the **Employee** column.

- We updated the columns on the **SMS Accounts** dialog box to include the first name, last name, contact phone, and locations rather than just the user name and locations.
- The Status Bar includes a new icon which links to the chat messaging system.



Click the icon to open the **Chat Message Viewer**. The logged-in employee's unread and received messages load for the date range, up to and including today. Right-click to open the **Send Message** window.

- We made the following improvements to the **Chat Message Viewer** :
  - The **Send Message** dialog box now defaults to Selected User instead of All Users/Locations.
  - You have the option for Dolphin Management to store the last user to whom an employee sent a chat message: **(System Options->General tab->Remember previous Chat Message recipient)**.
  - Message count
  - New toolbar buttons, Mark Read and Mark Unread
  - Ability to control-click or shift-click to mark multiple messages as read or unread
  - Double-click a message to view and/or reply to it
  - View button changed to View/Reply button
  - Improved performance loading messages, and a "Loading" message box opens for large results
- We made the following improvements to the incoming chat message window:
  - Message threads: When a user initiates a new chat message, that begins a message thread, and all messages in that thread are listed in the incoming chat message window. Each message in the thread includes a time stamp and the user who send the message
  - You can send a reply directly from the incoming chat message window.
  - If you click **Send**, the message is sent and the incoming chat message window closes.
  - If you press Return/Enter after typing your reply, the incoming chat message box stays open, the text box clears out, and the reply is sent immediately.
  - You can right-click any message in a thread to open the **Create new Patient Comment from this message** option. This replaces the **New Comment** button from the previous release.
  - Copy and Select All options are now available when you right click on a message in a thread.
  - Use Control+C to copy text within a message thread.
  - Multi-line messages now show without truncation.
  - We improved the load time for threads sent to multiple user groups.

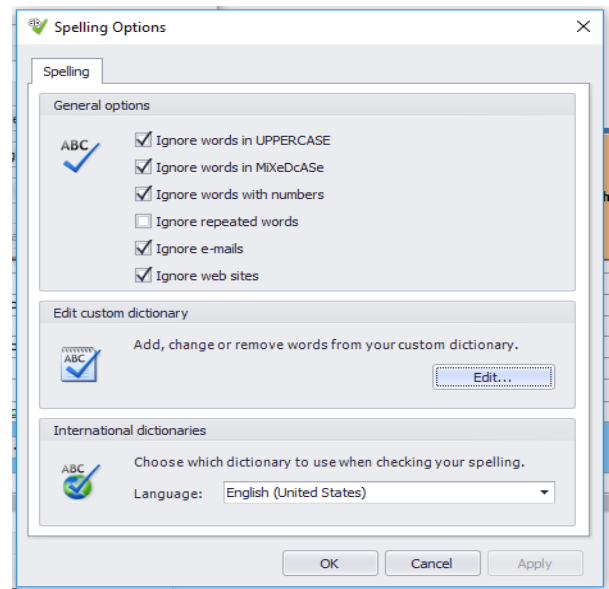





- We have added spell check to **Edit Email Template**, both text and HTML versions, **Edit SMS Template** as well as treatment card **Notes** tab, and many other (non -numeric) text fields throughout Dolphin Management.

A red, wavy line appears under any misspelled or unrecognized words. You can right-click on the underlined word, and select from one of the following options:

- Click a spelling correction (if one appears) to replace the underlined word with that suggestion.
- Ignore All (ignore this word if it appears again).
- Add to Dictionary (The system adds this word to a custom dictionary associated with the logged-in user, so it will not be flagged again.)
- Check Spelling (appears if you right-click the underlined word, or anywhere else in the field where this option is supported).

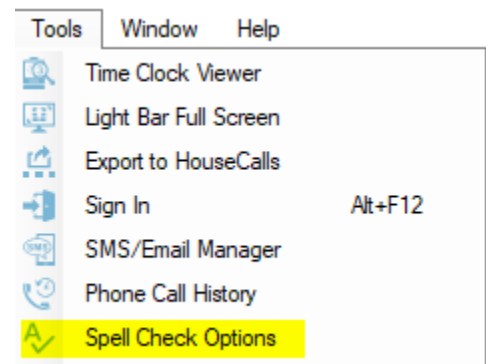


On the Treatment Plan, **Notes** tab, click the spell check icon  to open the **Spelling** dialog box. From the email and SMS templates text boxes, right-click, and select **Spelling** to open the **Spelling** dialog box. This works similarly to other software spell-check dialog boxes.

To customize spell check behavior, click the **Options...** button, which opens the **Spelling Options** dialog box. Here you can specify general spelling options, such as ignore all words in uppercase, ignore web sites, ignore words with numbers, etc. You can also add, change, or remove words from your custom dictionary. These options apply to the logged-in user only.

You can also access the **Spelling Options** dialog box at any time, via the **Tools** menu. This way you can set or modify your spelling preferences at any time before running a spell check in the areas of the program where it is supported.

- We added **Send Email Message** as a new option when you right-click on a line of data in a dialog box (for example, right-click on an appointment on the schedule, or on a patient in the Letters batch).
- We improved the load speed of the **Time Clock Viewer**.
- We enhanced the **Time Clock Viewer** to automatically load time clock data when launched. You can control this via a new option that is checked by default.



**Tools-->Time Clock Viewer-->Options-->Auto-load viewer when opened**

- We changed the way we store and retrieve production. Previously the doctor associated with the patient was always considered the production employee. Now this information is stored internally based on the employee associated with an adjustment on the ledger.
- We made the following changes to the **Appointments** step on the Checkout wizard:

- Replaced the Next Visits and Future Appointments grids with a tabbed interface, and each tab provides a count of totals.
- From the Future Appointments tab list, you can right-click on any appointment, and access the same features as you do in the **Scheduling** patient navigator group box. The information here refreshes to reflect changes to future appointments made outside the Checkout wizard.
- The **Schedule**, **Search**, and **Recall**-related buttons appear on the Next Visits tab, and a Search button appears in the first column in grid. Click this button to open **Search Schedule** for the appointment listed.
- We enhanced the **Lookup a Patient** feature: When you look up a patient by name, you now have the option to look up by (Last, First), which is the default, and (First Last). Additionally, we improved the way wildcard characters work, and capitalization is no longer required.

Examples:

Criteria	Enter	To Find
Last, First	A or a	All patients with last names beginning with "A"
Last, First	%son	All patients with last names ending in "son"
First Last	J %son	All patients with first names beginning with "J" and last names ending in "son"
First Last	b a	All patients with first names beginning with " B" and last names beginning with A

- We now prevent users running an older version of Dolphin from making any financial updates if another user updates his or her machine to the latest version of Dolphin.
- We have improved the way you can enter shortcut date periods in date fields, including the Weeks Out field in a treatment card Next Visit entry. We have also added two notations, Y for year and Q for quarter. You can also use a minus sign to subtract a number from a period rather than add it.

Examples:

Enter	To Specify
1M 1W	1 month plus 1 week from today
3M1D	3 months plus 1 day from today
1Y – 4D	1 year minus 4 days from today
4M1W1D	4 months plus 1 week plus 1 day from today

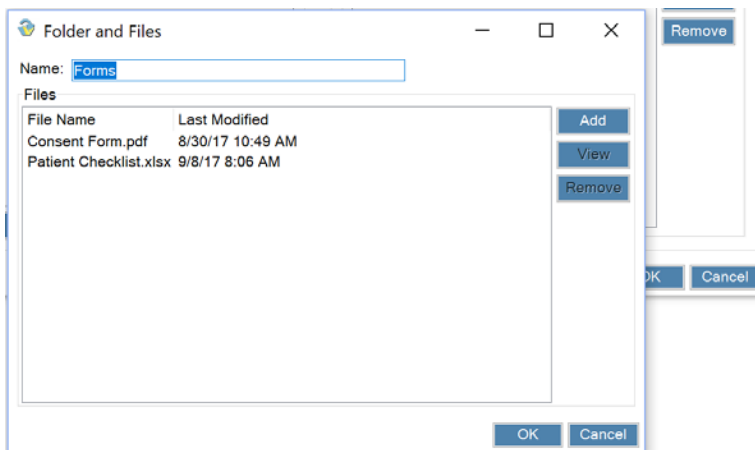


- We added two new options to the **Help** menu: **View Release Notes** and **What's New in DM v9**. The **View Release Notes** option replaces the **View Update History** option.
- We added a new application/employee right, **Merge and Conversion Utilities** under **Miscellaneous**, which is given to all admin users by default. Users with this right can access and run all of the Merge and Conversion options on the **Tools→Utilities** menu.

### **Document Organizer**

- We enhanced the **Folder Template Setup** feature in **Documents**. When you set up a template folder, you can now add files to that folder, and that folder and its associated files will be added to all applicable entities in your database. For example, if you want to add a “To-Do” list whenever you add a new patient, you would create a default folder, specify that it is for a Patient Record Type, and add that “To-Do” list to the folder. From the Documents screen for an entity:

**Options→Folder Template Setup→Template Details group box→Add:**

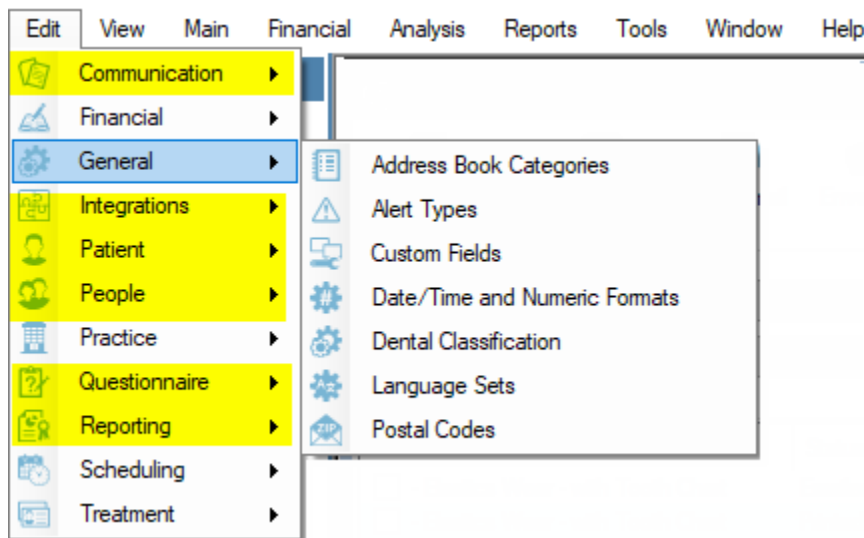


From the **Folder and Files** dialog box, click **Add** to open the **Add File to Template Folder**. Here you can select the file and add it to the selected folder (in the screen shot above, it is the FORMS folder). This folder and file will be added whenever you open any patient's **Documents**.

- We added a **Refresh** button to the Documents tool bar.
- The **Send to→Compressed (zipped) folder** option is functional when you right-click on a document or folder in the **Documents** right pane.

### **Edit Menu**

- We restructured the Edit Menu so that many of the items previously under Edit→General are now reorganized and easier to find:



The screen shot above shows which items are still under **Edit→General**.

The following items, previously under **General**, can be found under the **Communication** menu:

- Email Setup
- Email Templates
- Letter Statuses
- Phone Number, Type, and Integration Setup
- SMS Templates

The following items, previously under **General** can be found under the **Integrations** menu:

- MyOrthodontist/Anywhere Dolphin Setup
- Partner Integration
- Plugins

Under **Patient**:

- Patient Comment Types
- Patient Statuses
- Tracking Dates

Under **People**:

- Contact Types
- Doctor Types
- Doctors
- Group Types
- History Types
- Image Types
- Marital Statuses
- Other Referrals
- Relationships
- Salutations
- Schools

Under **Questionnaire**:

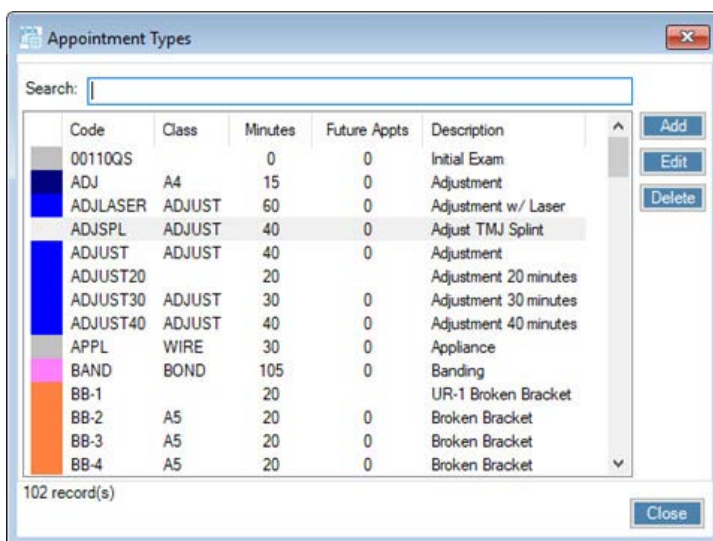
- Question Groups
- Questionnaire Letters
- Super Questionnaire Letters

## Super Questionnaire Presentation Setup Super Questionnaire Setup

### Under **Reporting**:

Category  
Hummingbird Setup  
Reports  
Report Batches  
Report Rights Overrides

- The **Appointment Types** dialog box is now a list box, where you can search, filter, and select from a list of existing appointment types or create a new appointment type. In previous releases this was a look-up only, and each time you wanted to edit or add an appointment type, you had to start over from Edit→Scheduling→Appointment Types. Now this list box stays open, allowing you to edit and add several appointment types without having to start over from the **Edit** menu. When you are finished, you can click the red X or the **Close** button.



The **Appointment Types** list box includes the following columns for reference purposes:

- **Statuses:** the number of automatic patient status changes tied to the appointment type
  - **Charges:** the number of automatic charges tied to the appointment type
  - **Letters:** the number of automatic letters tied to the appointment type
  - **Questionnaires:** the number of automatic questionnaires tied to the appointment type
  - **Alerts:** the number of automatic alerts tied to the appointment type
- You can now change both the **Code** and **Description** when you edit an appointment type, even if that appointment type has already been used in the treatment card. Any prior uses of that appointment type continue to use the code and/or description defined at the time the treatment card entry was logged. When you open **Edit an Appointment Type**, click the **History** link in the upper right corner to view what changes were made and who made them. Note that for appointment types created in prior releases, the initial values for date/time and employee will be missing, but any changes made from this release forward will be tracked properly.
- We have changed the way you set up automatic patient status changes associated with appointment types:

You can configure one or more automatic patient status changes based on the following options:

- Appointment Status Change** – This triggers when an appointment of this type is moved into the specified appointment status.
- First procedure entered in a treatment card Visit entry** – During patient check-out, the patient status changes if the first procedure entered on today's treatment card visit entry matches this appointment type.

3. **Last procedure entered in a Treatment Card Visit Entry** – During patient check-out, the patient status changes if the last procedure charted in the treatment card Visit entry matches this appointment type.
4. **Procedure entered anywhere in a Treatment Card Visit Entry** – During patient check-out, the patient status changes if the procedure entered anywhere in today's Visit entry matches the current appointment type. Options 2 through 4 are mutually exclusive; option 1 can be enabled or not in conjunction with one or none of options 2 through 4.

Example: Configure Appointment Type, Deband to trigger a patient status change to Retention when:

- The appointment is dismissed (using option 1)  
And
- The last procedure charted in today's Visit entry was a Deband (using option 3)

The screenshot shows the 'Edit an Appointment Type - Deband Appointment' window. The 'Code' is 'DEBAND', 'Description' is 'Deband Appointment', 'Class' is 'D2', 'Minutes' is '55', and 'Color' is red. The 'Doctor Time' section has a table with time slots and rates. A 'Patient Status Change' sub-dialog is open, showing 'Patient Status' set to 'Retention' and 'Trigger(s)' with 'Appointment Status Change' and 'Last procedure entered in a Treatment Card Visit Entry' selected. At the bottom, a table shows 'Patient Status' changes for 'Retention' triggered by 'Dismissed' in the 'Treatment Card' section.

Patient Status	Trigger When Appt Is...	Treatment Card
Retention	Dismissed	Last procedure in Visit

- The System Option, **Consider Treatment Card for Status Change** (on the **Scheduling** tab) has been removed because it is no longer necessary with these new options on Appointment Types.
- We have changed the way auto letters associated with Appointment Types are triggered. For each letter you configure, you can set up the following triggers when defining the appointment type:
  1. **Appointment Status Change** - This triggers when an appointment of this type is moved into the specified appointment status.
  2. **Procedure entered anywhere in a Treatment Card Visit Entry** – This triggers when you save a treatment card and any procedure charted on today's Visit entry matches the appointment type.
  3. **Procedure entered anywhere in a Treatment Card Next Visit Entry** – This triggers when you save a treatment card, and any procedure charted on the Next Visit entry matches the appointment type.

You must select one of the 3 options, but you can use more than one for each letter.

Note that any pre-existing letters tied to appointment types are converted using the following rules:

1. **Appointment Status Change** is selected in all cases, and the status defined previously is kept.
2. **Procedure entered anywhere in a Treatment Card Visit entry** is selected only if the Appointment Status Change was set to Dismissed.
3. **Procedure entered anywhere in Next entry** is selected only if the Appointment Status Change was set to Scheduled.

- The **Appointment Classes** lookup dialog box is now a list box, where you can search, filter, and select from a list of existing appointment classes or create a new appointment class. In previous releases this was a look-up only, and each time you wanted to edit or add an appointment class, you had to start over from Edit→Scheduling→Appointment Classes. Now this list box stays open, allowing you to edit and add several appointment classes without having to start over from the **Edit** menu. When you are finished, you can click the red X or the **Close** button.
- We added drag and drop capability between the **Available Types** and **Selected Types** list boxes on the **Edit an Appointment Class** dialog box.
- The **Patient Statuses** lookup dialog box is now a list box, where you can search, filter, and select from a list of existing patient statuses or create a new patient status. In previous releases, this was lookup only, and each time you wanted to edit or add a patient status, you had to start over from the **Edit** menu (Edit→Patient→Patient Statuses). The new list box stays open, allowing you to edit and add several appointment classes without having to start over from the **Edit** menu. When you are finished, click the red X or the **Close** button.
- For appointment types that are assigned to an appointment class, you can now override the color for the appointment type to a different color than what is assigned to the appointment class.

**Edit an Appointment Type - Adjustment**

Code:

Description:

Class:

Minutes:

Color: Choose Color ☒ **Override**

☐ This is a New Patient Exam

☒ Include on the Practice Analysis

☐ This Enqueues a Delayed Initial Ins Claim

☐ This is an Emergency Procedure

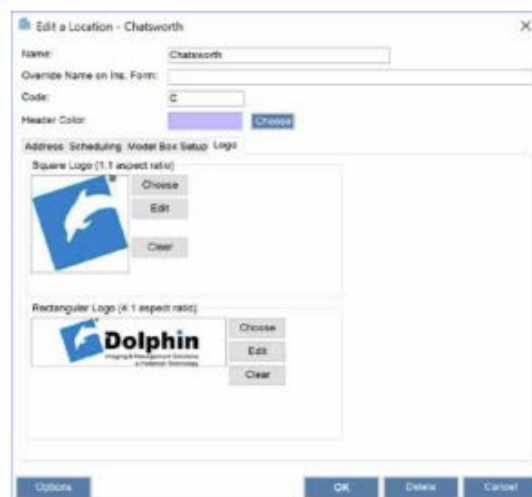
Doctor Time: ☐ Override Class Doctor Time

1-5	0.00
6-10	2.00
11-15	0.00
16-20	0.00
21-25	0.00
26-30	0.00
31-35	0.00
36-40	0.00

Click to check the **Override** check box next to the color, and then click the **Choose Color** button to choose a different color. Any appointment or reservations of that type currently on the schedule will change to reflect the new color.

- We added the check box; **Classify as an Assistant for appointments**, to the **Add/Edit an Employee Type** screen. This box defaults to checked for all employees defined as Assistant in previous Dolphin Releases. For all other employee types, this new check box is not checked by default, but you can change this. This enables you to filter on and report on employee types other than those defined as Assistant. Note that this check box does not affect what is shown in the treatment card, if your layout includes an Assistant column. See [Treatment Card](#) for more information.

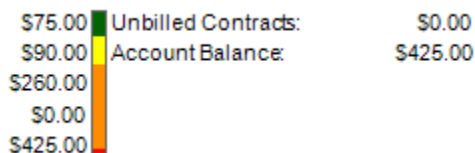
- We added a Logo tab to **Add/Edit Practice Information** and **Add/Edit Practice Location** where you can specify a square or rectangular logo as well as a transparent image type and background color. You can use the logo on custom reports and standard reports, such as receipts and appointment slips.
- You can now delete an entire code type from the database and specify whether to move some or all the items to a different code type or delete the items in that code type. (**Edit**→**Financial**→**Code Types/Codes**)
- You can now specify the amount to associate with treatment codes on the **Add/Edit a Treatment Type** dialog box. (**Edit**→**Financial**→**Treatment Types** (create New, or Edit existing). When selecting this treatment type on the **Edit a Patient, Fees** tab, the amount specified on **Add/Edit a Treatment Type** is copied over to the **Fees** tab.
- We added a new check box, **This is an Active Patient**, to the **Edit a Patient Status, Patient Status** tab.
- We added a new check box, **This is a Treatment Start**, to the **Add/Edit a Treatment Type** dialog box. (**Edit**→**Financial**→**Treatment Types**)



These two new check boxes will be used to drive report data and other upcoming features currently in development.

## Financials

- We added support for Breeze electronic payment integration.
- We added a gas gauge to the ledger that appears whenever the total due is greater than zero. The length represents the total due, and it is broken down by colors as follows: Current charges are shown in green; charges over 30 days are shown in yellow; charges over 60 days are shown in orange; and charges over 90 days are shown in red.



- We added the option (checked by default): **Attempt to launch QuickBooks after export**, to the **QuickBooks Deposit Export Settings** dialog box. If you do not want QuickBooks to launch after exporting deposits, you can turn this option off.
- You can now access the **Insurance Treating and Billing Claim Information** screen from the **Edit**→**Financial** menu. Previously you could access this screen from the **Insurance Claims** screen only.
- For Zuelke Financial Expert users, we integrated ZACC – Zuelke Automated Credit Coach. If ZACC returns an error while attempted to get a billing party credit rating, we now display the ZACC error rather than the generic message shown previously.
- When you change any of the following settings on an employer plan, Dolphin now prompts you to confirm those same changes should apply to every patient who has that employer plan:



Procedure Code Type  
Continuation Frequency  
Continuation Code  
Print Charges on Form  
Print Signature on File to Release Records to Insurance  
Pre-Determination Form Required  
Initial Form Required  
Continuation Forms Required

Previously we prompted for Diagnosis Type only.

- You can now specify state Medicaid coverage on insurance forms. Click the **EPSDT/Title XIX** check box on the **Insurance Claim, Form Fields** tab.
- We no longer allow you to save a recurring payment setup if you attempt to set it up using credit or ACH, but you do not select a payment method. Previously we just issued a warning message, but still allowed you to save. Now we still issue the warning message, but you cannot save the setup until you correct the problem.
- We added a new database log entry, type EPMT, which tracks when a user posts a payment type associated with electronic payments, but did not select an electronic payment method.
- We added a new option, **Use Patient's Location to Print Receipt** on the **System Options** dialog box, **Financial** tab. When checked, Dolphin Management uses the patient's assigned location when printing a receipt; otherwise it uses the employee's logged-in location.
- We now update the **Treatment Start Date** and **Date Appliance Placed** fields on the insurance **Benefit** tab to the date when a delayed initial claim is queued (either by post-dating or performing a procedure set to trigger queuing delayed claims).
- We added two new application rights:
  - Start Treatments, Contracts and Benefits
  - Unstart Treatments, Contracts and Benefits

Both of these are granted to employees with the Modify Contracts right by default. These rights control whether the Start or Unstart Treatment/Contract/Benefits buttons are active.

- On the **Decrease Total Due** screen, we added a column to the list of charges that shows whether a charge affects production.
  - If you intend to apply the decrease to charges that affect production only, you can choose any adjustment type, whether that adjustment type affects or does not affect production.
  - If you intend to decrease charges that do not affect production, the **Adjustment Type** drop-down list will show only those adjustments that do not affect production.
  - However if the list includes charges that affect production as well as charges that do not, the **Adjustment Type** drop-down menu will still show only those adjustment that do not affect production, and the system will issue a warning message. In this case you must adjust the charges that affect production separately from those charges that do not.

- When you have an open credit on the ledger that affects production, the **Apply Credit to Charges** screen will show only charges that affect production. If the open credit on the ledger does not affect production, the **Apply Credit to Charges** screen will show charges that do and do not affect production.
- When you mark an insurance policy as inactive, you can no longer post charges to the ledger or see this policy as an option on the **Patient Financials** dialog box.
- We added a new option on the **System Options, Financial** tab: **Use Service Codes Instead of Treatment Codes for Per Visit Charges**. When activated, you can use the codes tied to the service, when posting per visit charges, instead of the codes tied to the treatment specified on the **Edit a Patient, Fees** tab.
- You can now add multiple discounts to a treatment proposal. Instead of the **Discount Type** drop-down menu, which allowed you to select one discount only, we have added a **Discounts** group box where you can add, edit or delete discounts:

Discount Description	Amount
Second Family Member	(\$50.00)
Professional Courtesy	(\$25.00)

***Edit a Patient → Fees tab → Proposed → Add Proposal***

## Letters

- We added the following letter tokens to support signature capture, an upcoming feature in MyOrthodontist 4.x:

CapturePatientInitials  
 CapturePatientSignature  
 CaptureProviderInitials  
 CaptureProviderSignature  
 CaptureResponsiblePartyInitials  
 CaptureResponsiblePartySignature  
 CaptureStaffInitials  
 CaptureStaffSignature

- We enhanced the **Dolphin Fields** list box:
  1. We added a **Search** box so you can filter the list of tokens by name and/or description.
  2. You can now right-click on a token and select **Copy** to add a token to the clipboard for pasting elsewhere.
  3. We added a new table type to the **Tables** tab: **Treatment Proposal Discounts**. This table type includes following tokens: RowNumber, TreatmentProposalDiscountLineAmount, and TreatmentProposalDiscountLineDescription.

- You can create an export file by dragging and dropping one or more tokens from the **Letter Token Editor** to your Windows desktop. You can import the contents of this file using the **Import** button on the **Letter Token Editor** screen.

***Letters → Options → Edit Tokens***

- We added these letter tokens to address patients with primary and secondary billing parties. Primary tokens merge data from the first billing party listed; secondary tokens merge data from the second billing party listed, regardless which billing party is the recipient of the letter or email.

PrimaryBillingPartyAccountNumber  
 PrimaryBillingPartyAnywhereDolphinMyOrthoUserName  
 PrimaryBillingPartyBirthday  
 PrimaryBillingPartyBirthdayWords  
 PrimaryBillingPartyCellPhone  
 PrimaryBillingPartyCity  
 PrimaryBillingPartyCityStatePostalCode  
 PrimaryBillingPartyEmail  
 PrimaryBillingPartyEmployerName  
 PrimaryBillingPartyFax  
 PrimaryBillingPartyFirstName  
 PrimaryBillingPartyFullName  
 PrimaryBillingPartyGender  
 PrimaryBillingPartyGenderFull  
 PrimaryBillingPartyGreeting  
 PrimaryBillingPartyHomePhone  
 PrimaryBillingPartyLastName  
 PrimaryBillingPartyName  
 PrimaryBillingPartyNextStatementDate  
 PrimaryBillingPartyOfficePhone  
 PrimaryBillingPartyPostalCode  
 PrimaryBillingPartyRelationshipToPatient  
 PrimaryBillingPartySalutation  
 PrimaryBillingPartySocial  
 PrimaryBillingPartySpouse  
 PrimaryBillingPartyState  
 PrimaryBillingPartyStreet  
 SecondaryBillingPartyAccountNumber  
 SecondaryBillingPartyAnywhereDolphinMyOrthoUserName  
 SecondaryBillingPartyBirthday  
 SecondaryBillingPartyBirthdayWords  
 SecondaryBillingPartyCellPhone  
 SecondaryBillingPartyCity  
 SecondaryBillingPartyCityStatePostalCode  
 SecondaryBillingPartyEmail  
 SecondaryBillingPartyEmployerName  
 SecondaryBillingPartyFax  
 SecondaryBillingPartyFirstName  
 SecondaryBillingPartyFullName  
 SecondaryBillingPartyGender

SecondaryBillingPartyGenderFull  
SecondaryBillingPartyGreeting  
SecondaryBillingPartyHomePhone  
SecondaryBillingPartyLastName  
SecondaryBillingPartyName  
SecondaryBillingPartyNextStatementDate  
SecondaryBillingPartyOfficePhone  
SecondaryBillingPartyPostalCode  
SecondaryBillingPartyRelationshipToPatient  
SecondaryBillingPartySalutation  
SecondaryBillingPartySocial  
SecondaryBillingPartySpouse  
SecondaryBillingPartyState  
SecondaryBillingPartyStreet

- We added these letter tokens specific to AnywhereDolphin and/or MyOrthodontist user types:

AddresseeAnywhereDolphinMyOrthoUserName  
BillingPartyAnywhereDolphinMyOrthoUserName  
DoctorAnywhereDolphinMyOrthoUserName  
PatientAnywhereDolphinMyOrthoUserName  
ReferralAnywhereDolphinMyOrthoUserName

- We added the letter token, QrCodeMyOrthoPatientBadge, which will be used with an upcoming MyOrthodontist feature called patient badge. When this feature is available, this token merge into a patient badge QR code, which can be used in patient GPS, patient sign-in, etc.
- We added several letter tokens specific to a patient's active primary and/or active secondary insurance policy.

PrimaryInsuranceBillingCenterName  
PrimaryInsuranceBillingPolicyNumber  
PrimaryInsuranceCarrierName  
PrimaryInsuranceCity  
PrimaryInsuranceContact  
PrimaryInsuranceEmail  
PrimaryInsuranceEmployerPlan  
PrimaryInsuranceFax  
PrimaryInsuranceGroupNumber  
PrimaryInsuranceHealthPlanID  
PrimaryInsuranceOfficePhone  
PrimaryInsurancePatientPolicyNumber  
PrimaryInsurancePayerID  
PrimaryInsurancePostalCode  
PrimaryInsuranceState  
PrimaryInsuranceStreet  
PrimaryInsuranceSubscriberAddress  
PrimaryInsuranceSubscriberBirthdate  
PrimaryInsuranceSubscriberCity  
PrimaryInsuranceSubscriberEmploymentStatus  
PrimaryInsuranceSubscriberGender  
PrimaryInsuranceSubscriberGenderFull

PrimaryInsuranceSubscriberID  
PrimaryInsuranceSubscriberMaritalStatus  
PrimaryInsuranceSubscriberName  
PrimaryInsuranceSubscriberPhone  
PrimaryInsuranceSubscriberPostalCode  
PrimaryInsuranceSubscriberRelationship  
PrimaryInsuranceSubscriberState  
SecondaryInsuranceBillingCenterName  
SecondaryInsuranceBillingPolicyNumber  
SecondaryInsuranceCarrierName  
SecondaryInsuranceCity  
SecondaryInsuranceContact  
SecondaryInsuranceEmail  
SecondaryInsuranceEmployerPlan  
SecondaryInsuranceFax  
SecondaryInsuranceGroupNumber  
SecondaryInsuranceHealthPlanID  
SecondaryInsuranceOfficePhone  
SecondaryInsurancePatientPolicyNumber  
SecondaryInsurancePayerID  
SecondaryInsurancePostalCode  
SecondaryInsuranceState  
SecondaryInsuranceStreet  
SecondaryInsuranceSubscriberAddress  
SecondaryInsuranceSubscriberBirthdate  
SecondaryInsuranceSubscriberCity  
SecondaryInsuranceSubscriberEmploymentStatus  
SecondaryInsuranceSubscriberGender  
SecondaryInsuranceSubscriberGenderFull  
SecondaryInsuranceSubscriberID  
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SecondaryInsuranceSubscriberName  
SecondaryInsuranceSubscriberPhone  
SecondaryInsuranceSubscriberPostalCode  
SecondaryInsuranceSubscriberRelationship  
SecondaryInsuranceSubscriberState

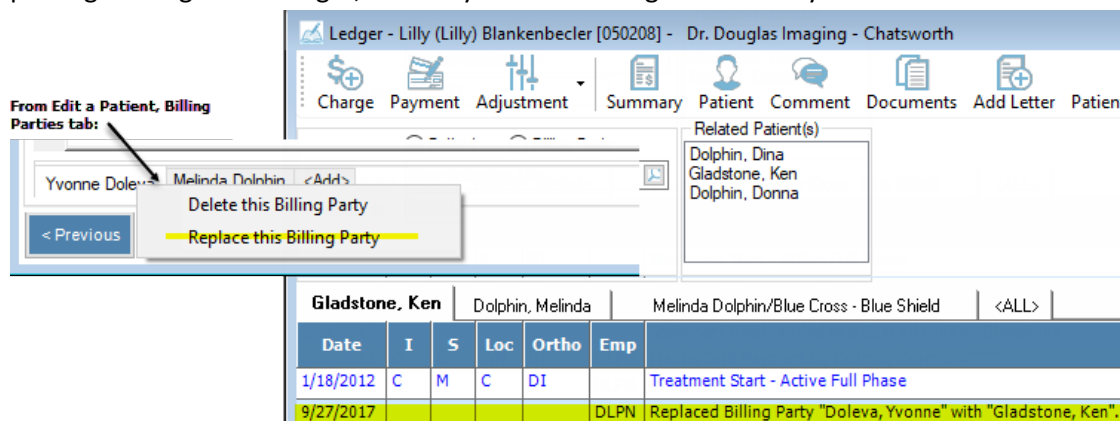
- We added several user-specific letter tokens where User corresponds to the logged-in employee who is printing or merging a letter:

UserLoginName  
UserFirstName  
UserLastName  
UserFullName  
UserEmail  
UserGreeting  
UserSalutation  
UserStreet  
UserCity  
UserState

UserPostalCode  
UserOfficePhone  
UserCellPhone

## Patient Information

- We added a new right-click option; **Replace this Billing Party**, to each billing party tab, on the **Edit a Patient** dialog box, providing you have the new application right, **Replace a Billing Party**. Only users with admin privileges can grant this right, which by default is not granted to anyone.



This feature allows you to replace all references to one billing party with any other billing party in the system, providing that the current and replacement billing parties do not already have a contract and/or benefit set up for the same patient. When replacing a billing party, ensure that the replacement billing party is not already linked to that patient; you cannot link one billing party to a patient twice.

Once the replacement is completed, the new billing party is added to the patient ledger, with a note showing the date and the billing party he or she replaced. Additionally, we added a confirmation message box, suggesting that you review the patient's insurance policy subscriber information and relationships to ensure they are accurate.

- We now consider patient birth dates as part of determining whether you are adding a duplicate patient name. In other words, if you have two patients with the same name, but different birth dates, Dolphin no longer warns you that you are creating a duplicate patient. This feature is linked to a new check box on the **System Options, General** tab; **Require birthdate before detecting duplicate patient**, which is checked by default.

If you prefer to be warned regardless of the patient birth date, you can un-check this new system option. When you attempt to add a patient with the same name as an existing patient, the warning message box opens after you enter the identical name, the minimum information required, and then click **OK**.

## Reports

- At the request of Zuelke customers we improved the Case Start Tracking for "B" & "C" Patients (Zuelke Financial Expert module), which was not calculating the **Contract Length Met** column correctly.
- We made the following improvements to the **New Interactive Report**, category and field selection screen for DIRT:
  - We replaced the **Categories** drop-down list with the **Report Category** group box, where you can select from radio buttons for **Doctor**, **Non-Patient**, **Patient**, or **School**.
  - Under **Field Categories**, there is now an **<ALL>** option, selected by default, which enables you to search on all available fields in the selected **Report** category.



- For **Report** categories that have more than one field category, the field category is shown to the right of each field listed in the **Available Fields** list box.
- We added a **Search** box to the **Available Fields** list box. Type in the **Search** box to search for fields containing that text, and click the **All** button to clear the search text and show all available fields.
- You can use the Control or Shift keys while clicking fields in the **Available** or **Selected Fields** list to multi-select fields to add or remove.
- You can now drag and drop multiple fields between the **Available** and **Selected Fields** lists.
- The screen now loads faster than it did previously.
- We added the Patient category, Last Dismissed Appointment to DIRT, and it includes the same fields as the Last Appointment category, but the field name includes “Dismissed.” For example, the field Last Appointment Orthodontist would be Last Dismissed Appointment Orthodontist, etc.
- We added new DIRT fields (to Patient category, Last Appointment):
  - Last Appointment Was Emergency
  - Last Appointment Cancelled By Patient
- We added the following DIRT fields (to Patient categories) to work with AnywhereDolphin:
  - Patient's AnywhereDolphin/MyOrtho Username
  - Billing Party's AnywhereDolphin/MyOrtho Username
  - Default Billing Party's AnywhereDolphin/MyOrtho Username
  - Doctor's AnywhereDolphin Username
  - Default Doctor's AnywhereDolphin Username
  - Patient Professional's AnywhereDolphin Username
  - Referred In By AnywhereDolphin Username
  - Referred Out To AnywhereDolphin Username
- The Care Call DIRT fields now omit deleted records.
- The Flex Plan Spending report now includes practice and location information.
- You can now export DIRT reports to a file. The Export tool bar button now includes two options: **Export this report's layout**, which generates a DQX file (what the Export button did previously), and **Export this report's results**, which exports the data in CSV, JSON, or XML format. You can then open the exported data using the default application on your computer for these file types.
- You can now have your practice logo included when you print appointment slips and receipts.
- We added a new **Options** button on the DIRT tool bar, where you can select **Hide criteria from printed report**. This option is unchecked by default, but if you are using a large amount of criteria, you now have the option to save space on the printed report.
- When you generate a DIRT report, and click the tool bar, **Email** button to send to a large number of recipients, you can now click-sort the columns on the **Email Messages** dialog box.
- We added a new Hummingbird report, Daily Check Sheet Grouped by Assistant.
- We modified the Hummingbird report, Inserts Scheduled for a Specified Range of Days, to include new columns: Next Proc Time, and Appointment Column.
- We added the following new categories to the Hummingbird Setup: Morning Huddle – New Patient Exams, Morning Huddle – Starts, Morning Huddle – Debonds, Morning Huddle – Emergency, and Morning Huddle – Schedule Search.
- We updated the Schulman Report for 2017.

## Schedule

- We added a progress bar to each day on the Calendar widget. This indicates how full the schedule is based on the percentage of booked, templated appointment reservations for that day.
- The flyover appointment tool tips now include the provider/orthodontist associated with the appointment.
- We added a new tab to the Calendar widget on the right-side of the **Schedule** window: **Needs Appt[ ]**, and the number of patients needing an appointment is displayed in the parentheses. By default, this tab lists all patients in an active status who do not have a future appointment scheduled, but you can customize this by right-clicking on a patient on the tab and selecting **Options** from the menu. This opens the **Needs Appointment Options** dialog box, where you can:
  - Select which active statuses you want to include in the list of patients with no future appointment (all statuses are selected by default).
  - Specify the minimum number of days since a patient's last appointment that will cause a patient to appear in the list.
  - Opt to also include patients in active status with an unscheduled treatment card Next Visit. For patients with multiple Next Visits, this applies if the oldest NV is not scheduled only. In other words, if a patient has 3 NVs, and the first has been scheduled, this patient will not appear in the **Needs Appt** list.

The options listed above are saved per logged-in user.

From the **Needs Appt** tab, you can do any of the following:

- Click sort the columns to alphabetize by patient name and/or active status name.
  - Right-click on any patient in the list to access a patient-context menu, which includes options to search for and schedule this patient's next appointment.
  - Open the list of patients in a separate window.
  - Drag and drop patients from the list directly to the schedule.
- We made the following changes to the filtering options in patient appointment history lists:
  - **Show Future Appointments Only** filter has been renamed to **Show Future Appointments**. This option lists only those appointments scheduled after the current date.
  - We added the **Show Today's Appointments** filter. This lists appointments scheduled on the current date.
  - We added the **Show Past Appointments** filter. This lists appointments scheduled prior to the current date.
  - You can use one or any combination of the above filters when viewing appointment history lists.
  - Filters are preselected by default depending upon the logged-in employee: **Show Today's Appointments** and **Show Future Appointments** are checked for new employees. Any existing employee who had the **Show Future Appointments Only** selected in a previous release will see **Show Today's Appointments** and **Show Future Appointments** preselected, which represents pre Version 9 behavior. Any existing employee who did not have **Show Future Appointments Only** selected will see **Show Past Appointments**, **Show Today's Appointments**, and **Show Future Appointments** preselected.
- You can now right-click on a scheduled appointment and select either **Print Appointment Slip** or **Email Appointment Slip**. When you opt to print the appointment slip, the slip prints immediately. When you opt to email the appointment slip, the **Email Settings** dialog box opens with the appointment slip attached in

PDF form. This enhancement removes the need for the **Print Method** prompt.

- We added an option to Patient GPS to use the signed-in location only for Sign-In, Patient GPS, and Light Bar.

Right-click the GPS status bar, and select **Set Sign-In, Patient GPS, and Light Bar Locations and Chairs for this computer**.

There are two new options, the default option keeps the behavior from previous releases. The **Use the location I am logged into for Sign-In, Patient GPS and Light Bar** option is new.

- The QR code at the far left of the GPS status bar now opens the Appointment Status Change screen, which MyOrthodontist users can use with the new Patient Badge feature in MyOrthodontist 4.0. After the patient scans the badge, the Appointment Status Change screen loads that patient and any appointments he or she has on today's schedule that have not been dismissed.

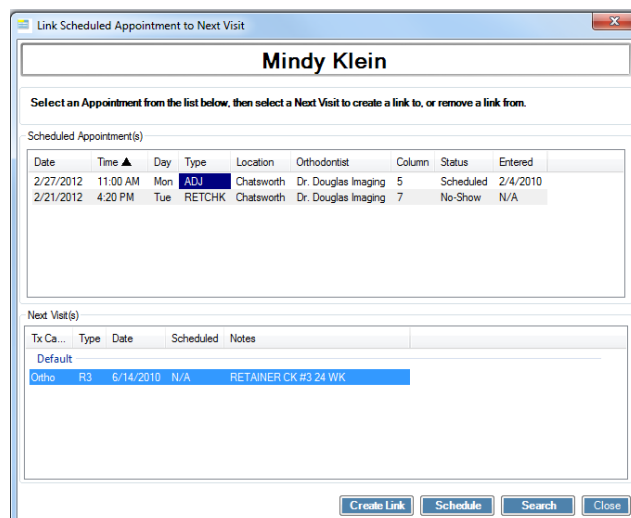


- We added a new option on the System Options → Scheduling tab:

#### **Prompt to create a recall when an appointment is marked as No-Show**

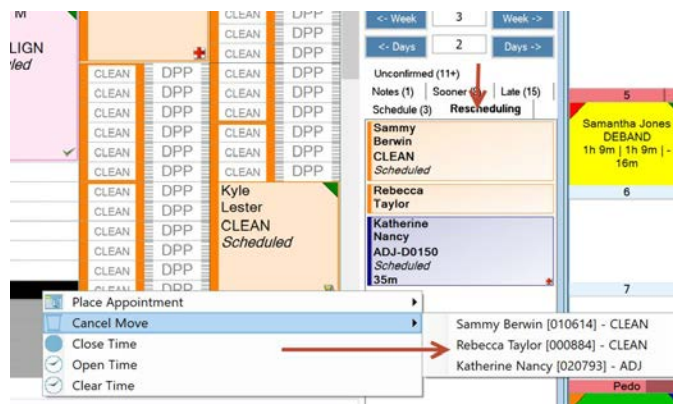
Checked by default, this option allows you to control whether or not the system prompts you to put a patient on recall after a no-show. Click to un-check this option if you do not want the reminder pop-up to appear.

- We enhanced **Appointment Reminders** feature. On the **Appointment Reminders** dialog box, **SMS** tab, we added two sub tabs: **Reminder Message** and **Scheduled Message**. Use the **Scheduled Message** tab to send an SMS message at the time the patient schedules an appointment. When this feature is enabled, the scheduled SMS message is added to the SMS batch and sent immediately to the phone number specified for the SMS and appointment reminders.
- We added a new option, available when you right-click a scheduled appointment: **Link to Next Visit**. This opens the **Link Scheduled Appointment to Next Visit** screen, where you can link or unlink the selected



appointment to or from a Next Visit entry in the patient's treatment card. Select a scheduled appointment and then click a Next Visit, as shown. If the appointment is already linked, instead of the **Create Link** button shown, a **Remove Link** button appears. If there is more than one Next Visit listed the first in the list is highlighted by default. **Search** and **Schedule** buttons are also available on this screen should you need to reschedule the next visit. You can also access this option from a patient's Treatment Card; however in that case, you would initiate the link from a Next Visit on the treatment card grid.

- We added a **Next Visits** tab to the patient navigator section of the Scheduling dialog box. This tab lists all next visit treatment card entries for the selected patient and all related patients. The **Scheduled** column lists when the next visit or visits are scheduled. Note that only next visits scheduled from this update forward will have the **Scheduled** column populated.
- You can drag and drop onto the schedule to schedule an unscheduled next visit.
- You can reschedule multiple appointments. Simply select each appointment to reschedule, and drag it to the **Rescheduling** tab on the calendar widget. After you have dragged and dropped the desired appointments to the **Rescheduling** tab, right-click a slot on the calendar.



Click **Place Appointment**, and select the appointment to place from the list. If you want to cancel one or more of the appointments you selected to reschedule, right-click on the calendar, select **Cancel Move**, select the appointment, and it is moved back to its original time slot.

- We added two new check boxes to the **Add/Edit an Appointment Type** dialog box:
  - This is a Start
  - This is a Debond

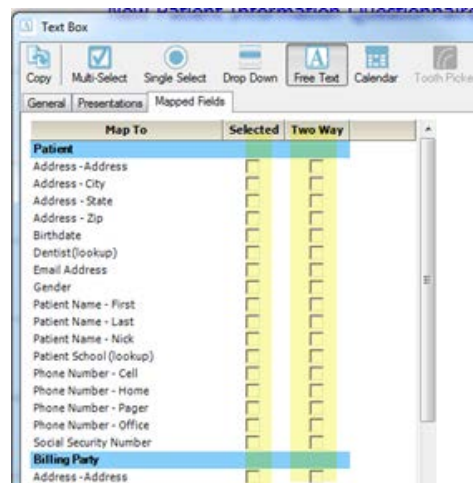
These new check boxes will be used to drive report data and other upcoming features currently in development.

- We improved the load speed on the GPS status bar enhanced menu with drill-down options.
- The **Assistant** field on the **Appointment** dialog box now offers a drop-down menu rather than a look-up button.

## Super Questionnaire

- There is a new option on the Super Questionnaire Setup, Options menu: Preview Online->Standard Flow Layout. Use this option to view how the questionnaire will look when viewed via AnywhereDolphin. If you are licensed for it, you may also see the option New Patient Online Form.
- When setting up a text box in a Super Questionnaire, you now have the option to specify a single line text box.
- We added the following options to the **Tooth Picker** right-click menu:
  - **Select All Primary** –clear all selections and all select primary/diciduous teeth only
  - **Select All Adult**– clear all selections and select all adult/permanent teeth only
  - **Unselect All** – clear all current selections

- The **Align Tops**, **Align Middles**, **Left to Right**, and **Align Bottoms** buttons are now available for non-administrator users.
- We added two-way mapping to Super Questionnaires, so you can give your patients pre-filled out questionnaires using the demographic information you already have in your database for each patient. To take advantage of this feature, when you set up your questionnaire, specify **Two-Way** for each field you want to populate the questionnaire. For example, if you have a text field for Patient First Name, you can map that to Patient Name – First by selecting the **Two-Way** check box for that field. Note that for each question, you can select two-way mapping for one field only.



When your staff member opens the questionnaire for that patient, the Patient First Name field will already be completed. Likewise for any other fields you choose to map that you have completed in the patient record. You can map both primary and secondary insurance policies, however only two policies total can be mapped for patients with multiple policies.

If any of the pre-filled out data has changed, staff can simply click the **Mapped Fields** button on the open super questionnaire, and specify that the database should be updated. If the information in the database did not get transferred to the questionnaire (as in the case of Patient Birthdate in the screen shot below), just click the **Update Answers** check box for that field:

**Mapped Fields**

Select

Update Database    Update Answer

Patient Name: Lilly Blankenbecker

Billing Party: Ellen Jones

Primary Insurance Policy: Blue Cross - Blue Shield

Secondary Insurance Policy: [NONE]

Question	Map To	Answer	Current Value In Database	Update Database	Update Answers
Patient Name	Patient Last Name	Blankenbecker	Blankenbecker	<input type="checkbox"/>	<input type="checkbox"/>
Patient Address	Patient Address	6325 De Soto Avenue, Suite A	6325 De Soto Avenue, Suite A	<input type="checkbox"/>	<input type="checkbox"/>
Patient Insurance Company	Primary Dental Insurance Company	Blue Cross - Blue Shield	Blue Cross - Blue Shield	<input type="checkbox"/>	<input type="checkbox"/>
Patient First Name	Patient First Name	Lilly	Lilly	<input type="checkbox"/>	<input type="checkbox"/>
Patient Date of Birth	Patient Birthdate	2/4/1985	2/4/1985	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient City	Patient City	Woodland Hills	Woodland Hills	<input type="checkbox"/>	<input type="checkbox"/>
Responsible Party Last Name	Billing Party Last Name	Jones	Jones	<input type="checkbox"/>	<input type="checkbox"/>
Responsible Party First Name	Billing Party First Name	Ellen	Ellen	<input type="checkbox"/>	<input type="checkbox"/>
Responsible Party's Address (if different from Patient Address)	Billing Party Address	405 Nordhoff Street, Suite 212000000	405 Nordhoff Street, Suite 212000000	<input type="checkbox"/>	<input type="checkbox"/>
Responsible Party's City (if Address is different than Patient Address)	Billing Party City	Chatsworth	Chatsworth	<input type="checkbox"/>	<input type="checkbox"/>

Dolphin Mobile 5.0 and above support this feature; previous versions of Dolphin Mobile do not.

## Tools menu

We added a new utility, **Move Locations and Providers**, which you can use to move patients from one location and/or provider to another and still store historical information. This is different than the **Convert Locations** utility, which modifies historical transactions.

## Treatment Card

- We now prevent you from opening a patient treatment card if another user is editing **Treatment Card Setup**.
- You no longer have to reload the treatment card after turning options on or off:
  - Show Past Appointments
  - Show Future Appointments
  - Show Patient Treatment Comments
  - Show Letter History
  - Show Email History
  - Show SMS History
  - Show Aquarium Content Sharing
- We added a new option to the **Treatment Card Field** setup, for field type, **Weeks Out: Show calculated or scheduled next visit date**. When this option is checked, the **Weeks Out** field on the treatment card will show one of:
  - The calculated Next Visit date (based on the shortcut date provided when the entry was created)
  - The actual date of the scheduled Next Visit appointment

Asterisks surround the calculated Next Visit date if the Next Visit has not been scheduled.



- When you resize the columns on the **Choose Appointment Types** window (which opens when you click in the **Next Visit** or **Appointment Type** column in **Treatment Card**), the column sizes are saved per computer.
- We added a new option, **Show Aquarium Content Sharing** to the **Options** menu. When checked, Dolphin adds an AQ entry to the treatment card grid that tracks when a patient has viewed shared Aquarium media.
- In conjunction with the above enhancement, we added **Aquarium Share** to the **Colors** tab of the **Screen Setup, Colors and Fonts** dialog box. You use this to set the color for AQ entries.
- We consolidated the **Orthodontist** and **Assistant** field types into the **Employee** field type. Now, when you select **Employee** as the **Field Type**, an **Employee Type** field appears with a drop-down menu from which you can select **Assistant**, **Orthodontist**, **Front Office**, etc.
- We added the check box **Underline spelling errors while editing text in this field** to the **Treatment Card Field** dialog box, **Field** tab in **Treatment Card Setup**.
- We also added the option, **Underline spelling errors while editing text in Comment entries** to the **Treatment Card Setup, Options** tab. This is checked by default.

Activating these options causes a white line to appear under all unrecognized or misspelled words in text fields and Comment entries in the treatment card grid. You can right-click on the underlined word, and select from one of the following options:

- Click a spelling correction (if one appears) to replace the underlined word with that suggestion.
- Add to Dictionary (The system adds this word to a custom dictionary associated with the logged-in user, so it will not be flagged again.)
- Ignore All (the system overlooks this word if it appears again)

Note: The Spell Check option (described under [General](#)) is not available in text fields or Comment entries in the Treatment Card grid.

- We separated the **Show Letter, Email, and SMS History** option (under the **Options** menu) into three separate options: **Show Letter History**, **Show Email History**, and **Show SMS History**.
- You can now view the full SMS message text in the treatment card grid without having to click the **View** button on each message.
- You can now use custom bitmap files as the graphic type when setting up the tooth chart. On the **Tooth Chart Item** dialog box, **Chart Item Details** tab, the **Graphic Type** pull-down menu now includes Bitmap. When you select Bitmap, a browse icon appears, and you can select from any JPG, BMP, or PNG file on your computer. Note that transparent images (32-bit, BMP and PNG files) work best.
- You can now create a link between a Next Visit on a patient's treatment card to a scheduled appointment. Right-click on a Next Visit, and select the new option, **Link to Scheduled Appointment**. This opens the **Link Next Visit to Scheduled Appointment** dialog box. Click an appointment listed in the Scheduled Appointment(s) group box, and click the **Create Link** button. You can remove a link to a scheduled appointment if a link already exists by clicking on the **Remove Link** button. **Search** and **Schedule** buttons are also available on this screen should you need to reschedule the next visit.

- We now support fractional weeks as defined on a treatment planning item. This translates into the WO (weeks out) treatment card column. You can enter 7.7 for 7 weeks, 5 days, 4.3 for 4 weeks, 2 days, etc.
- We redesigned the **Treatment Card Field** dialog box so that the first tab (the **Field** tab) contains the majority of options for the selected field type. Additionally, we now hide and show options and tabs that apply to each field type. The screen shot here shows what is displayed for field type **Text**:

**Edit → Treatment- → Treatment Card Setup → Treatment Card Layout → Treatment Card Field**

- We enhanced the **Notes** section on the **Plan** tab at the bottom of the **Treatment Card** dialog box. Now, when you enter treatment information (**Treatment Plan**, **Item Details**, and **Treatment Card** tab) this information is also included on the **Plan** tab, **Notes** section for quick reference.

There is a new right-click menu on the treatment card header which you can use to change a patient's status.

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## Specialty Module BETA

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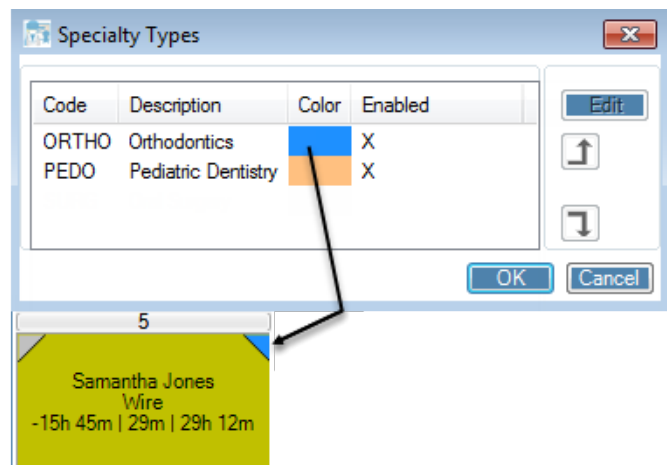
Available in this release is the Dolphin Management Specialty Module BETA, which supports pediatric dentistry and multiple specialty practices (pediatric dentistry and orthodontics for example).

Please refer to your Dolphin Management 9.0 Beta Agreement for limitations that apply to this beta software version.

The first Beta version of this module ran with Dolphin Management version 8. The following enhancements have been made since then:

### General

- In addition to changing how we store and retrieve production information, we now determine the production employee based on whether the **Track Production** check box is checked on the **Edit an Employee** dialog box, and whether the ledger item affects production.
- In addition to the **Checkout** wizard changes described New Management Features in 9.0, the Next Visits tab includes a Specialty column, and the Notes column includes a description of services associated with the next visit. This description will be prepended to any notes made at the next visit.
- We added a specialty tab to the TAPI **Incoming Call** dialog box. If the incoming call is from a patient in orthodontics or another specialty, the patient's assigned location, provider, status, total due, and next appointment information are displayed on **Incoming Call** screen.
- We added the specialty color to the upper-right corner of seated chairs on the light bar. The specialty color reflects the specialty of the seated appointment, similar to how it appears on the schedule.



### Analysis Tools

- You can now filter practice analysis charges, payments, and production data by specialty.
- The **Provider** filter for **Practice Analysis** now includes all employees who have the **Track Production** box checked on the **Edit an Employee, General** tab.

### Edit Menu

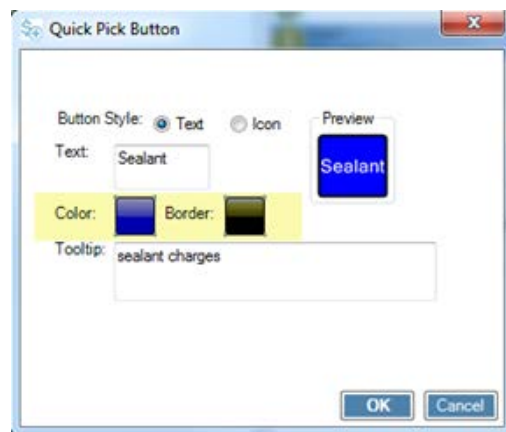
- The **Code Frequencies and Limitations** dialog box now hides the **By Tooth** check box unless the **Check Time** box is checked. This way you can specify to which tooth a specific procedure applies.
- The **Edit an Employer** dialog box, **Dental Benefits** tab now has an option, **Cover 100 % of Everything**, which causes Dolphin to charge everything to the insurance plan, regardless of coverage books and Fee Schedules.

However you can track write-offs in cases where insurance pays 100 percent, but the fee schedule specifies

less than the normal service fee. For example, if your practice charges \$100 for a procedure, but the fee schedule specifies \$80, the ledger now shows: \$20 charges to the patient, a \$20 adjustment to the patient, and an \$80 charge on the insurance ledger.

We made the following changes to text-based, Quick Pick buttons:

- New border color option for text-based Quick Pick buttons
- Auto-size text on buttons
- Multi-line text allowed on buttons (up to 20 characters)



## Financial

- If you have the right to change the production employee associated with a charge, you can change the production employee shown on the ledger: Right click on a charge that affects production and select the employee to whom it should belong. This change will affect the production reports, and this change will be logged as an “adjustment,” that shows the production employee change only.
- When you post a credit adjustment that affects production, Dolphin Management prompts you to select the production employee associated with this credit balance.
- You can now select the production employee via a drop-down list.

Production Employee for Credit:		David Management, Dr.	\$495.00
		Dolphin, Barbara	
		Dolphin, Julie	
		Dolphin, Kathy	
		Dolphin, Linda	
		Dolphin, Lisa	
		Dolphin, Lorin	
		Dolphin, Loryn	
		Dolphin, Michael	

- We changed the way the **Refund Total Due** feature works:
  - Now when you right-click on **Total Payments**, **Total Charges**, **Current**, or **Total Due** on the ledger, the option **Refund Total Due** is available even if no open payments exist. This enables you to mass refund payments that are already closed.
  - The **Show All Payments** is automatically checked when there are no open payments.
- We now calculate the amount insurance will cover after subtracting the deductible from the full amount. For example, if the charge is \$150, the deductible is \$50, and insurance covers 80 percent, we calculate as follows:  $150 - 50 \times 80\%$ .
- We added a new screen that opens after you post an insurance underpayment and mark that item as complete on the **Insurance Payment** screen. The new Insurance Payment adjustment screen gives you 3 options to handle the unpaid portion of the claim:
  - Leave the unpaid charge on the insurance ledger.
  - Transfer the unpaid portion to the billing party ledger.
  - Write off the unpaid portion on the insurance ledger.

Insurance Payment Adjustment

There was an underpayment by the insurance company. How would you like for us to handle the unpaid portion? Any unchecked items will be left as Unpaid charges on Insurance.

☒ Leave unpaid charge on Insurance Ledger  
☐ Transfer the unpaid portion of the charge to the Billing Party Ledger  
☐ Write Off unpaid portion off of Insurance Ledger

Choose the Charges you wish to be included

Select	Date	Code	Service	Amount	Remainder
<input checked="" type="checkbox"/>	2/21/2012	D0150-2	Comprehensive oral evaluation - new or established	\$150.00	\$50.00

OK

- The **Insurance** tab on **Edit a Patient** now includes a tabbed control for in-network and out-of-network benefits. When you edit a value on one tab, the corresponding value on the other tab increases or decreases by that same amount.
- For patients with multiple dental insurance policies, we now use each fee schedule for each policy unless you want to use the same fee schedule for all insurance policies. In that case, simply click to check the **Use only this fee schedule when patient has policies associated with other fee schedules** check box on the **Dental Benefits** tab in **Edit an Employer, Employer Plans** tab.
- When posting a charge, you can drag and drop a Quick Pick button to the charge grid to add all charges and codes associated with that button.
- When you post a payment on a patient's ledger, we show tooth and surface information on that ledger.
- Insurance policies with the **Policy Inactive** check box checked appear faded on the **Edit a Patient, Insurance tab**, and the policy tab in **Ledger**. You can still click on these policies, however.
- You can now specify each code limitation by tooth. When you add or edit an employer, and add or edit a code limitation, there is a **By Tooth** check box on the **Code Frequencies and Limitations** screen. When you post a charge or edit a charge in check-out wizard, that charge is listed under **Code Frequencies and Limitations**, and there is a tooth associated with that charge, Dolphin validates that it is correct. Dolphin also prompts you to pick a tooth if one is required to post a charge.
- Additionally, for any existing code limitations that include code D1351, the **By Tooth** check box is checked by default.
- When you transfer a charge from one ledger to another, we now include a **Specialty** filter to the **Transfer To** section of the **Transfer Charge** screen.

**Transfer Charge**

**Transfer From**

Patient: Lilly Blankenbecler  
 Ledger: Melinda Dolphin/ORTHO  
 Ledger Type: Charge  
 Current Transaction Amount: \$90.00  
 Total Due: \$90.00  
 Transfer Amount: \$90.00  
 Total Due After Adjustment: \$0.00  
 Production Change: \$0.00  
 Description: Cephalometric X-Ray

**Transfer To**

Patient: Blankenbecler, Lilly  
 Specialty: Orthodontics  
 Ledger: Doleva, Yvonne  
 Total Due: \$0.00  
 Transfer Amount: \$90.00  
 Total Due After Adjustment: \$90.00  
 Production Change: \$0.00  
 Comment:

**Account Balance Impact Grid**

	Current	Over 30	Over 60	Over 90	Total Due	Unbilled	Account Balance
Before	\$90.00	\$0.00	\$0.00	\$0.00	\$90.00	\$0.00	\$90.00
After	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**Account Balance Impact Grid**

	Current	Over 30	Over 60	Over 90	Total Due	Unbilled	Account Balance
Before	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
After	\$90.00	\$0.00	\$0.00	\$0.00	\$90.00	\$0.00	\$90.00

OK Cancel

## Patient Information

- Patient statuses now support specialties. There is a **Specialties** tab on the **Edit a Patient Status** dialog box, and the **Edit a Patient, Status** tab now includes a tabbed interface for each specialty.

**Add a Patient Status**

Patient Status: Specialties Colors Letters

☒ Orthodontics  
☒ Pediatric Dentistry

Select All Select None

**Edit a Patient - Christopher Dolce [DEMOS] - Dr. David Management - Chatsworth**

Ledger Schedule Search Lookup View Tx Card Dx/Tx Comment Documents Network Imaging My Orthodontist Print Add Letter

Patient Patient (more) Status Relationships Billing Parties Insurance Fees Appointments Referrals History Custom

**ORTHO PEDO**

Patient Status: Entry Date:  
 Status Start Date: 12:00:00 AM New Patient Exam Date: 12:00:00 AM  
 Est. Months in Status: 0 Recall Date/Time-frame: Add PEDO Recall  
 Est. Completion Date: Recall Appt Type:

OK Cancel

- We added a **Specialty** column to the **History** tab on **Edit a Patient**. This column tracks patient status changes, statement history and insurance claim history only.
- We also added a new **Specialty** filter to the **History** tab so you can filter patient history by specialty.

Patient Patient (more) Status Relationships Billing Parties Insurance Fees Appointments Referrals History Custom

View: All Show Deleted Items Person: Christopher Dolce (Patient)

Specialty: <All>

Date	Type	Specialty	Description	View
2/21/2012	PATIENTSTATUS		Transfer Out	



- Patient comments can now be created and filtered based on the specialty assigned to the patient. There is a new **Specialty** drop-down column in **Patient Comments**. For patients assigned to all specialties, use this column to select the specialty to which the comment applies.

When you enter comments on a patient's treatment card or ledger, and use the **Options** menu to show the Treatment or Financials comments, respectively, only comments from the selected specialty are shown.

## Reports

We have enhanced DIRT and standard reports to support multispecialty practices.

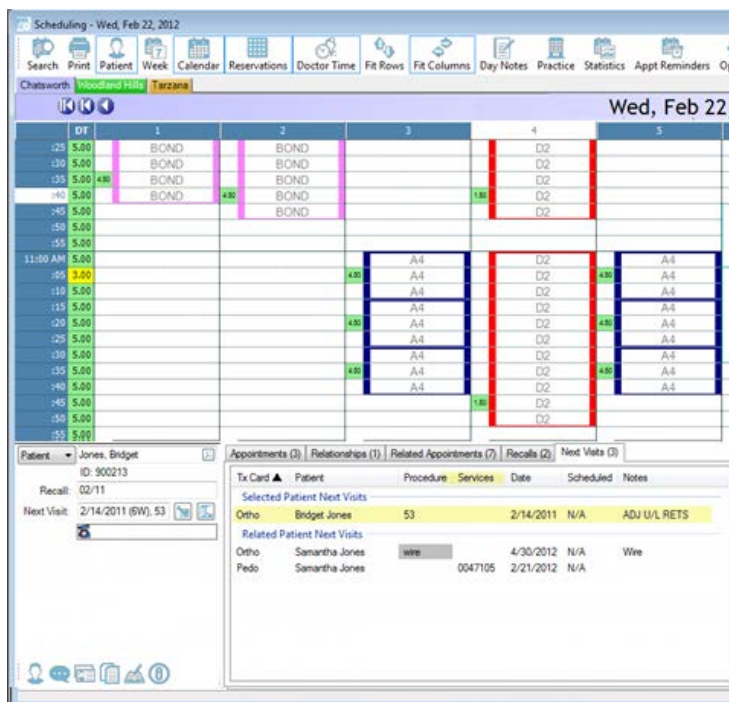
- We added a new report, **Provider Productivity**. You can filter based on a date range, percentage of collections to be paid, location, and production employee (employees marked for production tracking).
- We added a new report, **Dental Production**, available for Specialty users only.
- We added report parameters, Added Specialty ID and Specialty List for standard reports to support multi-specialty practices.
- We added the Specialty Code and Description field to the following DIRT field categories: Last Appointment, Next Appointment, Patient Current Status, Patient Status History, Recall, and Schedule.
- When changing the status of patients in a DIRT report, you can now filter by specialty:

## Scheduling

- When you link an appointment to a Next Visit on a patient's treatment card, you can now keep the appointment charges in sync if you treatment card has a charges column. After creating the link, the **Copy Charges** dialog box opens, which gives you the following options:
  - Don't Copy Charges
  - Copy Charges from Next Visit to Scheduled Appointment (the default)
  - Copy Charges from Scheduled Appointment to Next Visit

**Scheduling**→right-click appointment→**Link to Next Visit**→**Create Link**

- Patient appointment lists in the patient navigator, appointment history, **Edit a Patient**, **Appointments** tab, and check-out wizard, future appointments now show the appointment specialty in the first column.
- The **Next Visits** tab on the **Scheduling** patient navigator section includes a **Services** column listing any charges and services associated with the next visit.
- You can drag and drop a next visit entry to create an appointment of that type. In **Schedule Search**, you can drag and drop a next visit to the search criteria area to search for an open appointment using the next visit's criteria.
- A right-click context menu for each next visit entry offers various options as described below:
  - **Search and Make Appointment for this Next Visit** (if the selected next visit cannot be associated with an appointment on the schedule)
  - **Go to proposed day of Next Visit** (if the next visit cannot be associated with an appointment on the schedule)
  - **Go to Appointment** (if the next visit can be associated to an appointment on the schedule)
  - **Create Recall** (if the next visit cannot be associated with an appointment on the schedule and no recall exists for the specialty associated with the next visit)
- The **Assistant** field on the **Appointment** dialog box now offers a pull-down menu instead of a lookup button; the list of assistants shown includes those assistants assigned to the appointment's specialty only.



### Treatment Card

- If your treatment card has a charges column, and you link a Next Visit to a scheduled appointment, you can now keep the appointment charges in sync. After creating the link, the **Copy Charges** dialog box opens, which gives you the following options:
  - Don't Copy Charges
  - Copy Charges from Next Visit to Scheduled Appointment (the default)
  - Copy Charges from Scheduled Appointment to Next Visit

**Treatment Card** → right-click next visit entry → **Link to Scheduled Appointment** → **Create Link**

- Inactive insurance policies are now hidden on the drop-down menu on the **Send Pre-D Form** option for treatment proposals/plans.

- We made the following enhancements to the **Print/Create Treatment Proposal from Next Visit(s)** feature:

- Renamed to **Create Treatment Proposal from Treatment Card Entries** and you can now select today's visit and today's emergency entries for inclusion in the treatment proposal.
- You can access it from the right-click grid menu in the **Read-Only Treatment Card**, and from the standard patient right-click menu outside of **Treatment Card**.

- We added a **Send Pre-D** button to the tool bar, so you can generate a predetermination claim from the current proposal without creating a treatment plan.

- When you right-click on an appointment to open the **Create Treatment Proposal from Treatment Card Entries** dialog box, the specialty of the selected appointment is selected for the proposal. When you open a treatment card, the default layout is the first layout assigned to the selected specialty.

Create Treatment Proposal from Treatment Card Entries

Print Create Plan Create Plan and Print **Send Pre-D** Select All Select None Options

Patient: Bridget Jones Total Fee Adjustment Primary Ins. Other Ins. Discount Patient

Billing Party: Allen Jones \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00

Specialty: Orthodontics

Location: Chatsworth

Provider: Douglas Imaging, Dr.

Description: New Treatment Proposal

Valid Until: 4/3/2012

Visit(s) and Next Visit(s) to Include:

D	E	IMNDI	3Test	ASST	PROC	DR	TX Notes	Arch U	AWL
<input checked="" type="checkbox"/>				24	53	1	ADJ U/L RETS		
<input type="checkbox"/>				VR	53		ADJ U/L RETS; No Pills	15 TMA 2/21/2012	75 CNH 2/21/2012

Close

- We now exclude inactive insurance policies from the top of the printed dental treatment proposal.
- You can now choose the provider associated with the treatment proposal and the billing party for the discount. The numbers calculated are based on this information and whether the provider is in or out of network.
- When you create two **Next Visit** entries and you create a treatment proposal with charges for both next visits, the printed proposal now includes benefit and deductible information for both visits.
- When you edit **Visit** and **Next Visit** charges on the treatment card, these changes are saved on the treatment card, and they are also updated on the treatment proposal.

- You can right-click on the treatment card header and change a patient's status. For multi-specialty practices, where a patient is both an orthodontic and pediatric dentistry patient, you have the choice to change the patient's orthodontic status, pediatric status, or both.
- The **Treatment Card** now hides tabs for those specialties to which the patient is not assigned.

**Treatment Card - Bridget J. [900213] - Dr. Douglas Imaging - Chatsworth**

**Bridget J. [900213]**

Status:  Deband Date:   
 Birthdate: Oct 15 1968 Progress Date: --  
 Age: 48y, 7m PAN Date: --  
 Gender: F Cleaning Date: --  
 Dentist: Randy Babich Case Start Date: Aug 26 1997  
 School:  Nw Pat Exm Date:   
 HIPAA Signed: No Entry Date:   
 Referring Party: Randy Babich Orthodontist: Dr. Douglas Imag  
 Patient's Location: Chatsworth Assistant:

Ortho	D	E	IMNDI	3 T ST	PROC	DR
9/18/10	V		26	78	JG	DELIVER LRET DUE SE
9/18/10	V		26	78	1	DELIVER LRET DUE SE
1/07/11	V		24	53	2	ADJ U/L RETS

**Right Sidebar Menu:**

- Edit Patient ORTHO Status
- Change Patient ORTHO Status To...
- Patient Information
- Comments
- Treatment Card
- Treatment Card (Read-only)
- Create Treatment Proposal from Treatment Card Entries
- Appointment History
- Schedule Search
- Patient History
- Documents
- Ledger
- Patient Financials
- Insurance Claims
- Alerts
- Images
- Add Patient Letter
- Patient Network
- Send SMS Message

- After you seat a patient and open the treatment card, the treatment card layout that opens is based on the specialty of the seated appointment.
- The date of the visit or emergency entry is used to determine which code limitations apply to the visit when you are editing service charges applicable to that visit.
- When editing service charges on a Next Visit entry, the Weeks Out (**WO**) value is used to determine the planned date.
- If no **WO** value is entered, we use the Next Visit date; however you should enter the **WO** value before editing service charges on a Next Visit entry.