# PW Dental Version 15.4

**Major Enhancements:**

**Insurance:** Many enhancements including automatic Electronic Remittance Advice (ERA) download.

**Patient Information:** Set certain fields as required on the Edit Patient Information and Add Family windows.

**Patient Portal:** Available through PWDentistPortal. Patients can pay their balances using credit card on their smartphone.

**Treatment Plans:**
- Design custom printed treatment plans using Sheets.
- Create multiple treatment plans (active and inactive).
- Chart procedures to multiple treatment plans in the Chart module.
- Preference to automatically save signed treatment plans as a PDF.
- A signature must be cleared before a signed treatment plan's description, responsible party, or procedure priorities can be edited.
- Show procedure code abbreviation in the Treatment Plan module.

**Account module**
- Quickly add procedures to a patient's account (e.g. for products sold to patients like toothpaste).
- Option to store credit card tokens when using PayConnect.
- Run recurring charges using PayConnect.
- For X-Charge transactions, allow an electronic signature by patients when using a credit card terminal that has signature capabilities.
- Print receipts for X-Charge or PayConnect transactions via the Payment window.
- New preferences for finance charge minimums.
- New Definitions category determines Quick Proc items and associated procedure codes.
- New display field to show procedure code abbreviation in the Account module.
- New display field to indicate that procedures have been digitally signed.
- Statements that use sheets optimized to print faster.

**Appointments**
- Automated Appointment reminders for scheduled appointments (automated text messaging/SMS by Practice-Web).
- Customize what columns show in the Family module, Recall grid. New options for Previous Date and Interval.
- Hide or show completed planned appointments.
- Appointments sent to the pinboard from the Planned Appointment Tracker are removed from the tracker.
- When adding a blockout, start and stop time defaults to time selected on the Appointments schedule.
- The fee for broken appointments defaults to the fee for procedure code D9986.
- Customize the color used for broken appointment procedures in Definitions, Account Colors.
- Confirming appointments via postcards or SMS creates an automatic note in the CommLog.
- New static fields available when designing a Routing Slip using Sheets.

**Central Enterprise Management Tool**

- Filter connections by provider and clinic in the main window.
- Show the database connection status and version in contrast to CEMT database version.
- Daily and Monthly Production and Income reports.

**Chart module**

- Preference to use provider colors for procedures in the Chart module progress notes.
- Chart module shows indicator for signed consent forms.
- Ortho chart columns (Display Fields) can be set to allow selection from a picklist.
- View full path of a task in the Chart module progress notes.
- Changes to when electronic prescriptions are automatically copied to the Chart module. New option to manually copy.

**Clinics**

- Override clearinghouse settings on a clinic-level.
- Use different X-Charge merchant accounts for different clinics.
- Use different PayConnect merchant accounts for different clinics.
- Enter clinic-specific login credentials and clinic-specific addresses for DentalXChange e-bills.
- When setting up operatories, filter operatories by clinic. Picker button added for clinics and providers.
- Filter the following reports by clinic: Routing Slips, Outstanding Insurance Claims, Claims Not Sent, Procedures Not Billed to Insurance, Insurance Overpaid.

**CPOE Radiology Orders for EHR**.

- ADA procedure codes for x-rays are considered 'radiology' for EHR purposes.
- X-ray procedures added for a patient are automatically counted in the denominator for the CPOERadiologyOrders measure calculation.
- X-ray procedures approved by the EHR provider count in the numerator for the CPOERadiologyOrders measure calculation.
- New menu item indicates to EHR providers that approval is needed for radiology procedures.
- Providers can easily view pending radiology procedures and approve them using the Radiology appointment list (marks them as CPOE).

**E-mail**

- Incoming e-mails can attach to patients based on matching e-mail address.
- Add CC and BCC recipients.
- Create e-mail autographs (e.g. sender name and signature) for sent messages.
- Use variable fields in the subject or body of e-mail templates (e.g FName, LName, PatNum, ApptDate).
- Description of e-mail template can differ from the default e-mail subject.

**Insurance and Claims**

Edit Claim window

- New Attachments tab groups claim attachment information.
- New Status History tab to record and track custom claim data.
- Add a note when custom tracking status changes.
- Share of Cost column added to Misc tab.

<u>Send Claims window</u>

- Send Claims window is non-modal. Open other windows while sending or validating e-claims.
- Page through claim history by week.
- Validate Claims button checks claims for missing information prior to sending.
- Warnings are generated when user attempts to send a deleted or already sent claim.
- Type dropdown on Send Claims window allows extended selections.

ERAs. <u>Electronic EOBs (ERA 835)</u>

- View ERA button added to the Edit Claim window.
- Set ERAs to automatically download to the correct report path (if clearinghouse provides the reports).
- If a matching claim is not automatically found for the ERA, manually attach a matching claim.
- Carrier names show in the Send Claims, History grid.
- Patient names show in the Send Claims, History grid.
- Electronic Remittance Advice - ERA window is non-modal. It can remain open while visiting other areas of the program.
- Verify and Enter Payment window interface changes

Other related items

- Change Healthcare/Emdeon real-time benefits eligibility.
- Document the claim payment status (Payment Tracking) for individual claim procedures.
- When entering batch insurance payments, option to filter outstanding claims by patient last name and first name.
- IsScanned column added to Batch Insurance Payments window.
- New Definitions category for claim payment tracking.

**Patient Information**

- Set certain fields as required on the Edit Patient Information and Add Family windows.
- Set specific conditions for required fields.
- Medicaid State field added to Edit Patient Information window.
- Referred From field added to Edit Patient Information and Add Family windows.
- Validate the number of digits in a Medicaid ID by state.
- Preference to set the default primary provider as "Select Provider" instead of defaulting to the default practice provider.
- "Email" label changed to "Email Addresses" on Edit Patient Information window.
- Illogical combinations for race/ethnicity are not allowed.
- Double click a name in the Family Members list to open the Edit Patient Information window.
- New display field to indicate the number of broken appointments in the Chart module Patient Info area.

**Program Bridges**

- Build your own output file (e.g. .txt or .ini) for custom program bridges.
- Add an image to program link toolbar button.
- Scanora bridge.

**Security**:

- Backup permission shows in audit trail.
- Complete Appointment Edit permission allows editing of completed appointments.

- UserLogOnOff permission tracks when a user clocks in and out of the timeclock.
- New permissions for Medication Merge, Provider Merge, and Referral Merge and RequiredFields.
- Insurance Payment Create or Insurance Payment Edit permission is required to access batch insurance payments (Batch Ins button in Manage module) and Send Claims window.

**Tools**

- Globally move subscribers of one insurance plan to another.
- Merge patient referrals.
- Merge providers.
- Merge medications.

**Other**

- Search all tasks using various parameters.
- Preference to search for patients by preferred name instead of first name.
- Preference to store language and region for the practice.
- Preference to turn on composition typing for those using IME keyboards.
- New list contains two-character state abbreviations that are used to validate state IDs when state information is required.
- Progress indicator shows when updating, backing up databases, running check table commands, and optimizing/repairing from Database Maintenance.
- Increased text area for queries.
- Option to disable monthly backup reminder.
- New command line argument (Show="SearchPatient") opens the Select Patient window.
- Refresh while typing checkbox on the Select Patient window is now a computer specific setting.
- Preference to set the default setting for the refresh while typing checkbox on new workstations.
- Copy dental school course requirements from one semester to another.
- Message element sound recorder enhanced.
- Custom ID field added to Provider Setup window for informational purposes.
- Primary keys show on the Edit Clinic, Edit Provider, Edit Carrier, Edit Insurance Plan windows.
- Preference to show seconds on time cards.
- Enhanced interface for xml import/export of sheets.
- New eRx users connect to the LexiComp account instead of First Data Bank.
- For e-bills using DentalXChange, select different practice and remit to addresses.
- Enhancements to public health screenings.

# PW Dental Version 15.3

**Fee Schedules**:

- New fee schedule preference determines whether fees apply globally to all providers/clinics or can be changed for specific providers/clinics.
- Associate procedure fees in a fee schedule to specific providers and/or clinics.
- New definition for fee colors.

**Central Enterprise Management Tool (CEMT)**:

- Search for patients from the main CEMT window.
- Log in to an Practice-Web database from CEMT.
- Sync all security information for multiple databases simultaneously.
- Run Production and Income report by provider across multiple databases.
- Multi-threaded connection speeds up the retrieval of data from multiple databases.

**Integrated Texting:** Automated unlimited text messaging is available as a paid service.

- Send unlimited automated text messages for appointments, recalls and birthdays
- Patients can respond with no time limit.
- CommLogs automatically created for all messages.

**Payment Plan**: Recalculate amortization schedules for prepayments or payments to principal while preserving historical payments.

**Non-Dental Practices or Clinics**: Set a practice or clinic as "non-dental".
If set as non-dental, most tooth and surface references are removed from the interface.

- Graphical tooth chart removed from the module
- Tabs for missing teeth, movements and primary removed from the module
- Buttons for Perio Chart, Tooth Chart and Ortho Chart removed from the Chart Module toolbar.
- Labels that reference teeth or surfaces are hidden throughout the software
- Procedure Code column widened in Reports.

**ICD-10 Codes**: New preference to use ICD-10 instead of ICD-9 diagnosis codes on procedures.

**Minor Changes:**
Podium program link. Automates patient review generation.
Dental Intel button added to reports window. Business intelligence dashboards.
DentalTek program link. VOIP phone integration with Practice-Web.
Zoom in button added to reports using the Complex Report system.
Indicate late patients in the appointment schedule using color or by showing (L).
Show birthdate in the appointment schedule.
Set the default start time in the appointment schedule by appointment view.
Preference to limit the number of electronic billing statements sent per batch.
Preference to open patient address in Google Maps.
Preference to set a default stop/start date for patient medications.
Preference to set the insurance writeoff description.
When using patient clone, view sheets in both the original patient account and the clone account.
eCW: CDT codes longer than five characters allowed in outbound DFT messages.
eCW: Option to verify that all procedure notes are complete upon Finish and Send.
eCW: Option to verify that all procedure notes are signed upon Finish and Send.

Patient address information uses different 'Same for entire family' checkbox than provider and billing information.
New status options for sent prescriptions (Faxed, CalledIn, GaveScript, Pending).
Update window indicates the date and time a user updated Practice-Web.
Phone numbers in text boxes automatically formatted.
Daily and Monthly Production and Income report use Complex Report system.
Procedure Code report can be filtered by clinic or provider. Uses Complex Report system.
New Active Patients Report that uses Complex Report system.
New command line arguments: Module and Show.
Enhancements to Update in Progress window.
Hiding an operatory is not allowed if future appointments are scheduled in it.
New automation available when insurance plan effective date ends.
EHR dashboard shows line items for all core and menu measures and allows entry of notes for yes/no measures.
Note field on edit laboratory window lengthened to allow up to 30,000 characters.
Change column width, order and description in StatementMainGrid when using sheets for statements.
Images sort by date and time in Images Module.
Birth dates entered on select patient window carry over when adding new patient(s).
Reorder or hide Patient Field Defs.
Display fields added for PatientSelect (Next Visit, Last Visit, Cell Phone, Sec Prov).
TaskEdit permission.
Changes to the behavior of TaskNoteEdit permission.
Audit trail for tasks.
Confirmation list is non-modal. Right-click to select patient, open a chart, send to pinboard or delete an appointment.
ASAP list is non-modal. Right-click to select patient, open a chart, send to pinboard or delete an appointment.
Clinics show billing and pay-to addresses.
Procedures in the treatment plan module show an X when using substitution codes.
Generate CQM encounters based on completed procedures in a date range.
Ortho Chart date entries sorted oldest to newest, automatically scroll to most recent dates.
Add quick paste notes in Treatment Plan note field.
Non-billing entity override can be associated to a provider.
Customize provider specialties.
Changed the tab order on Adjustments window. Cursor defaults to Amount field when window opens.
Show Shopping List and OnHandQty added to Supply Inventory.
Status field added to Equipment.
UpdateFiles folder stored inside database instead of AtoZ folders.
Topaz model BSB signature pad supported.
Broken Appointment Procedure window automatically opens when an appointment is broken using code D9986.
New preference to automatically open the Adjustment window when an appointment is broken using code D9986.
"Provider" replaces "dentist" throughout software.

# PW Dental Version 15.2

**Pay Split Manager:** New tool to manage and allocate payment income to providers and procedures. Improved automatic payment split logic that is based on FIFO.

**Payment Plan Improvements:**

- Payment plan amortization schedule shows provider, interest, and total amounts.
- Payment schedule, down payment, and number of payments or monthly payment amount are stored in database.
- Payment plan changes are not saved until user clicks OK.
- Payment plan report has options to filter by date range, provider, and clinic, show family balance, and show insurance payment plans and/or patient payment plans. Generated report calculates total amounts by column, sorts by provider, and groups by clinic. Uses complex report system.

**Waiting Room:**

- Use text color to flag patients whose wait time has exceeded a certain value.
- Only show patients in the waiting room if their appointment is scheduled in an operatory that shows in the current appointment view.

**Broken Appointments:**

- Automation for missed appointments now uses the new ADA procedure code D9986.
- Preference to automatically show the Commlog window when an appointment is broken using procedure code D9986.
- New broken appointment report.

**Web Schedule:** New eService allows patients to schedule recall appointments online. Sign up is required and there is a monthly fee of $50.

**Reports:** Daily Payment report can be sorted by insurance payment type. Improved backend for many reports using the complex report system.

**Statements:** Customize statements using Sheets (must be enabled).

**Clinics:**

- New Clinic selection menu in the main menu.
- The following reports can be filtered by clinic: Appointments Report, Aging of A/R Report.
- Assign appointment views to clinics.
- Waiting room list filtered by clinic.
- Security enhancements:
    - Time clock only shows employees associated with the clinic the user has access to.
    - Restrict users from managing time cards by clinic.
    - Restrict users from running billing for other clinics.
    - Restrict users from running other reports for other clinics.
    - Restrict users from viewing or sending claims from other clinics.

**Patient Portal:** Enhanced user interface improves patient experience using the portal.

- Patients can view their financial info.
- Patients can change their own password.
- Automatic log-off after a period of inactivity.

**Central Enterprise Management Tool:**

- Create CEMT specific users with their own user groups & permissions and sync to other databases.
- Modify the global lock date. New global lock date preference.
- CEMT user data only visible on audit trail entries and log on window.
- Create custom connection groups.

**Minor Changes:**

Orthodontic total months for 5010 e-claims.
Finance Charge Report allows entering a date range.
Email Inbox: Preview new e-mails, interface enhancements.
Unscheduled List is non-modal (e.g. access other windows while Unscheduled List is open).
Send an unscheduled appointment from the Unscheduled List to the PinBoard.
Jump to the Chart module from the Unscheduled List.
Planned Appointment Tracker is non-modal (e.g. access other windows while it is open).
Send an unscheduled planned appointment from Planned Appointment Tracker to the PinBoard.
Jump to the Chart module from the Planned Appointment Tracker.
Backup tool checks for sufficient disk space on backup device.
Disable the process signal interval during periods of inactivity.
Reset all tooth movement values to zero.
Search for deposit entries by payment amount or check number.
Invoice note allows multiple lines.
Genoray's Triana bridge.
Preference determines when e-claims on the Send Claims window are validated.
Enter an original date estimate for a prosthesis on 5010 claims.
eRx button turns red when prescription information fails to update.
New tool to change secondary provider.
EmailSend and WebmailSend security permissions allow/block users from sending unsecure email.
UserQueryAdmin security permission allows/block users from running SQL commands.
Primary and secondary insurance carrier automatically updated when appointments created or insurance plan is dropped or added.
New filter for the confirmation list only shows appointments scheduled more than two months from the list start date.
Filter sent and received claims on the Send Claims window.
Image module audit trail details when a document is created, moved, edited, or deleted.
New security login preference requires manual typing of user name instead of selection from a list.
Mark tasks 'Done' from the Progress Notes.
Note text boxes on the Edit Schedule and Edit Blockout windows support quick paste notes.
Enhancements to Ortho chart audit trail.
Added Electronic Dental Society (EDS) clearinghouse.
Added bridge to SMARTDent, Panoramic Corp and bridge to Office documents.

# PW Dental Version 14.3

**Electronic EOBs (ERAs):** Simplified and semi-automated entry of insurance payment amounts by claim.

**Quick Procedure Buttons:** Customize labels, procedures, and surfaces.

**Appointments:** Customize the information that shows when you hover over an appointment in the schedule. Control appointment color by appointment type.

**Database Maintenance:** Choose which fixes to run and access detailed information. New database check to find procedures with multiple claim procedures for same insurance plan, and new tool to clear out old etrans message entries.

**Setup menu:** Menu items grouped by category.

**Sheets:** Create multi-page sheets. Patient images can be added to sheets.

**Insurance payment plans:** No longer requires deletion of charges.

**Images module:** Drag and drop files from a Windows folder into an Images folder.

**HL7:** New generic HL7 message definition that follows HL7 version 2.6 message structure standards.

**Canada:** Lab fee write-offs.

**Blue Theme:** The first phase towards adding themes to Practice-Web is complete.

**Medical Claim Form:** 1500 claim form updated from version 08/05 to version 02/12.

**EOBs/ERAs:** Download or print electronic EOBs.

**Minor Changes:**
Audit trail entry is created when a user logs on or logs off.
Manage eServices (patient portal, and mobile synch) from one window.
Option to add a patient information area to Account module using Display Fields.
Add a percentage discount to procedures in a treatment plan.
Note box no longer shows on printed Treatment Plan when there is no note.
Preference to show only grand total on printed treatment plans.
New image category definition for printed patient treatment plans.
Enhanced overlap logic for appointments.
Planned appointments logic enhanced.
Group notes show after the last associated procedure.
Blank print button on Send Claims window prints default claim form.
Option to filter by payment type on the Daily Payments Report (e.g. EFT, Check).
Option to hide completed payment plans on the Payment Plan Report.
Ortho Chart security permission and audit trail.
Task quick paste notes must have a category type of 'Task' to use shortcut
Block task popups when delivered to inbox.

Enhanced error messages for backups.
New preference to trigger a warning when selecting a non-patient in the Chart module.
When sending a secure web mail notification, an address other than the default e-mail address can be used.
Added Bridge to Apteryx XVWeb.
Added Bridge to HandyDentist.
Added Bridge to VinWinBase36 to convert PatNum into base 36.
Added Bridge to AudaxCeph.
Added Bridge to PandaPerio.
Added Bridge to iRYS.
Added Bridge to visOra.
Added Bridge to Z-Image.
Added VistaDent bridge.
TigerView bridge enhanced to pull thumbnails into Practice-Web.
Rx Edit security permission.
*Insurance Payment Type category* added to definitions (e.g. EFT, check).
Added patient name and page number to printed progress notes.
Time card management enhanced for easier navigation through multiple employees.
Software name, provider name, and date information added to several print outs and windows needed for EHR audits.
Auto Notes added to the Ortho Chart.
Added Patient Clone tool to help ortho offices track production and income.
Added Multiple ICD9 diagnosis codes for procedures.
Added Basic e-mail inbox.