PW Dental Version 17.1*

*Version 17.1 requires Micorsoft.Net Framework version 4.5 and a minimum 1280 x 768 resolution. Please evaluate your monitors before the upgrade. Version 17.1 will not work on workstations running Windows XP or Windows Server 2003.

Appointments

- New tool changes providers on future appointments based on the providers assigned to the operatory.
- [famRecallDue] static text field in Sheets will only include family members that are due for a recall and are not scheduled.
- [dueForBWYN] and [dueForPanoYN] static text fields now take disabled recall into account based on date and family balance.
- Filter the Unscheduled List by procedure.
- Updated labels on blockout Cut-Copy-Paste tool to reflect accurate behavior.

Billing

- Set a specific time of day to automatically run daily aging (e.g. non-peak hours).
- Update eStatement credentials without clearing the billing list.
- Option to send a statement directly to the Patient Portal.
- Scheduled date shows in Recurring Charges window.
- Preference to use the transaction date as the Payment date (instead of the scheduled recurring charge date) when running Recurring Charges.

Chart Module

- Use slider on the tooth chart to show procedure changes to the tooth chart over time.
- When a medication is marked as 'discontinued' in eRx, the same medication will be marked 'discontinued' in Practice-Web upon refresh of the Chart module.
- New preference to prompt user on how to handle fees when a provider changes on a procedure.
- For Canada, lab fee procedures now show on claims and lab fee estimates are based on the coverage of the associated procedure.

Claims and Claim Payments

- Process claim payments via virtual credit cards using X-Charge or PayConnect.
- Process ERA 835s from a central window. Options to filter ERAs by date, amount, clinic, carrier, trace or check #, and status.
- Finalize Payment button added to the Electronic Remittance Advice (ERA) window.
- Option to turn on/off automatic download of ERA 835s from Electronic Dental Services (EDS).
- Supplemental payments can have negative write-off amounts.
- Preference to force users to finalize insurance payments from the Batch Insurance window only.
- Finalize zero dollar claim payments so you can scan and view EOBs.
- Date Sent Orig field added to Edit Claim window to record original send date of claim.
- Date Sent field auto-populated when claim is sent. If resent, label changes to Date Resent and date is updated.

- Checkbox added to printed medical claim form 1500 to indicate 'Assignment of Benefits'.
- Attach a Claim Error Code to the status history of a claim.
- Preference determines which procedure description is used on printed claims when chart procedure code differs from a base procedure code description.
- Assign outstanding claims to specific users for follow-up.
- Logged on user and date/time received is captured on the procedure level when an insurance payment is received.
- Claim Type: Other window now shows plan type in column.
- Claim Identifier added as an optional item to add to Claim Forms.

Clinics

- External ID field added for mapping purposes.
- Set clinic-specific billing filter options.
- Option to search for patients associated to clinics that are hidden.
- When using QuickBooks and clinics, select the 'class refs' which will be available when sending deposits to QuickBooks.
- Clinics can only be hidden, not deleted.

Commlogs

- Add auto notes to commlogs.
- Preference to auto save commlogs every 10 seconds if changes have been made.

Dropbox enhancements

- Works with statements, email and claim attachments, summaries of care, wiki files and more.

Email Inbox:

- Compose new messages and reply to received messages.
- View messages that you have sent.
- Search emails based on specific criteria.
- Email Inbox is non-modal (other windows can be open at the same time).

Orthodontics

- For each column in the Ortho Chart, option to enter an internal name and display name.
- Print button added to Ortho Chart.
- Header on Ortho Chart printout reflects chart name and selected tab.
- Add an electronic signature stamp in the Ortho Chart for the person currently logged in. t
- Option to define procedures that can be considered orthodontic placement procedures (used to determine the Date Start for claims created using the Auto Ortho Claim tool).
- Option to override the Date Start on the Ortho Case tab.

Payment Plans

- Attached to Payment Plan checkbox removed from Payment window and replaced with label indicating the number of splits attached to a plan.

- When patient has a payment plan and a payment is entered, a prompt will ask the user whether the payments should be attached to a plan or not.

Payments

- Procedure code columns added in Pay Split Manager.
- Preference for 'Payments prompt for auto splits' includes option to force allocated payments to have pay splits attached to a procedure.
- Changing the provider on a completed procedure attached to a pay split will also change the provider on the pay split.
- When allocating a prepayment, new credit filter options when selecting procedures (include all, only explicitly attached, exclude all).

Reports

- Insurance Payment Plans Past Due Report lists insurance payment plans with balances that are overdue.
- Uniform Data Systems (UDS) report interface for the FQHC sealant measure.
- Option to cancel a query when it is running.
- Option to print Graphic Reports or export as PDF.
- Appointments Report header includes information about selected providers.
- Unearned Income report uses complex reporting system.
- Option to include writeoff estimates and adjustments in the Production and Income report.
- Option to include writeoff estimates in the Aging of A/R report.
- Option to calculate aging by patient or guarantor in the Aging of A/R report.
- Option to include procedures with no insurance estimates in the Procedures not Billed to Insurance report.
- Filter the Treatment Finder Report by clinic. Users only see clinics they are restricted to.
- Treatment Finder Report "TP Date Since" now includes same-day treatment.
- In the Outstanding Insurance Claims report, new option determines whether the date a claim was last sent shows, or the date the claim was originally sent shows.

Security

- Option to force users to change their password at next login attempt when passwords are required to be 'strong' and their password does not meet the criteria.
- After five consecutive failed log-on attempts, a user will be temporarily locked out of Practice-Web, the CEMT, and/or the Mobile Web for 5 minutes or until the account is manually unlocked.
- After a patient merge, history for both the merge 'from' and 'to' patient can be viewed in the Audit Trail.
- Reports - Daily permission allows/blocks a user from running daily reports for adjustments, payments, procedures, and writeoffs.
- Daily - View All Providers permission allows/blocks a user from viewing other provider information in a daily report.
- Production and Income, View All Providers permission allows/blocks a user from viewing other provider information in the Production and Income report.
- Patient Restriction Edit permission allows/blocks user from changing the 'Appointment Scheduling is Restricted' checkbox.
- Patient Billing Type Edit permission only allows/blocks user from changing billing type.
- Graphics Edit permission allows/blocks user from changing graphic settings.

- Sheet Delete permissions allows/blocks user from deleting sheets associated with a patient.
- Update Custom Tracking permission allows/blocks user from updating tracking status from the Outstanding Insurance Report.
- Insurance Plan Ortho Edit permission allows/blocks user from editing insurance plan ortho information.
- Insurance Plan Edit permission is required to add or edit discount plans.

Tasks

- Option to collapse/expand large tasks. Determine default behavior in Task Options.
- Add auto notes to tasks.
- Right click on a URL in a task note to open it in a browser.

Time Clock / Time Cards

- Visual changes to Time Card Setup window.
- Ability to delete multiple pay periods at once.
- Not able to create pay periods that overlap existing pay periods.
- Preference to hide pay periods that are older than six months.

Treatment Plans

- Treatment plan layout is determined using sheets. Classic mode is discontinued.

Web Forms

- When entering data in linked Web Forms, once first name, last name, and birth date are entered, they are inherited on each subsequent form.
- When retrieving Web Forms, email address and phone number are also considered when matching forms to patients.

Wiki Lists

- Right click on a URL in a wiki list to open it in a browser.
- Search option in wiki lists filters results.
- Advanced search option added to wiki lists.

Other

Recall List and Confirmation List Setup windows divided into separate windows.
"Show Graphical Tooth Chart" has been removed from Treatment Plan Module preferences.
Secondary insurance with Carve Out COB type includes deductible in calculation. EHR Modified Stage 2 dashboard now shows correct description for Objective 9 - Secure Messaging.

Clicking "Add Estimate" on a procedure on an insurance plan will open only the currently existing estimate instead of creating another estimate.
Added a ClinicDesc display field to the Account module and the Chart module. Add a custom referral type (in addition to referral from and referral to). One referral per provider shows in the

Patient Information grid.
Dropbox works with statements, email and claim attachments, summaries of care, wiki files and more.
Ability to add more messaging buttons.
User is no longer required to run as Admin when using X-Charge. Include procedure status in PR1 segment of HL7 inbound ADT messages.
Email PDF button added to the Edit Deposit Slip window.
New FeeScheduleHiddenWithPatient DBM unhides fee schedules if they are associated with patients.
Galera enterprise users can manually disable the MySQL integrity check during database maintenance.
DPlan added as option in Display Fields, TreatmentPlanModule.
Providers marked 'hidden' cannot access eRx.
Added Practice by Numbers bridge.
Carestream bridge name changed to Carestream Ortho/OMS from carestreamdental.com. i-Dixel bridge.
Added NewTom bridge.
Added Adstra Imaging bridge.

PW Dental Version 16.4

Major Enhancements:

Account module

- Create and assign discount plans that use adjustments to reduce the full procedure fee (e.g. for patients that do not have insurance).
- Option to email a PDF of a receipt to a patient after processing a credit card charge using PayConnect.
- **EMV** transaction support added for PayConnect.
- Invoices that use sheets have a new grid option that shows payments made the same day, payments made towards procedures on the invoice, and the remaining balance.
- Invoices that use sheets have four new output fields.
- Statements that use sheets have option to include provider and invoice number in the StatementMain grid.
- Click an adjustment in the account ledger to highlight associated procedures.
- If a recurring charge is denied, a declined transaction will show in the account ledger.
- Option to only view future dated line items in the payment plan Amortization Schedule.
- Preference determines default setting for the Exclude past activity checkbox on the Payment Plan window.
- Option to list all procedures that have not been explicitly accounted for on the Payment Plan Procedures and Credits window.

Appointments

- Attach all treatment planned procedures to an appointment with a single click.
- Single click on a square in the appointment length time bar to quickly increase appointment length.
- Option to print all routing slips by day or appointment view using the printer icon in the Appointments module.
- Option to include / not include custom recall types with special recall type appointments.
- Preference determines whether Daily Production is based on appointments or provider bars in the appointment view.
- Preference blocks user from creating appointments with no attached procedures.
- Preference blocks user from setting appointments complete if no procedures are attached.
- Preference blocks user from setting appointments complete if they have a future date.
- Option to enable insurance frequency checking.
- Insurance frequency conflicts can be checked when scheduling an appointment.
- Consider insurance frequency limitations when calculating insurance estimates in the Treatment Plan module.
- Customize which procedure codes are affected by insurance frequency limitations.
- Right click on an operatory header to show provider information.
- Past due tab added to Insurance Verification List.
- Option to consider benefit year renewal date when determining whether insurance verification is needed.
- Combine duplicate operatories.

Chart module

- Filter prescription templates on the Select Prescription window by drug name or dispensed amount. Opt to show/not show controlled substances. Search for templates using multiple terms.
- When accessing the Problem List from the Medical area, all of the patient's current, active problems are highlighted.
- Preference determines whether or not an insurance estimate is created when a procedure is entered with a previous date and status of 'complete'.
- Click a button to digitally sign Procedure Notes.
- Ceramic bridge autocode added to default auto codes.
- Procedure buttons for ceramic codes added to default procedure buttons.

Clinics:

- Option to add a clinic column to the progress notes.
- Option to 'hide' a clinic so it no longer shows an option in various dropdowns.
- Option to show or hide 'hidden' clinics in the Clinics window.
- Filter the Deposit Slips window by clinic. New clinic column.
- For each clinic, set a default Rx sheet that is used for prescriptions printed on a single page.
- Option to assign clinics (classes) to deposits in QuickBooks.

Orthodontics

- Generate periodic ortho claims based on a set frequency and fee using the
- All orthodontic setup options accessible on a new Ortho Setup option via Main Menu, Setup.
- New Ortho Case tab available in the Account module.
- View Ortho Case information in the ortho chart.
- Enter plan information about orthodontic claims on the Edit Insurance Plan window, Ortho tab.
- Entering data on an Ortho Chart tab will populate all tabs with that date and data in corresponding columns.
- Ortho chart toolbar button has dropdown options to select specific tabs.
- Preference to block users from entering claim payments on claims generated using the Auto Ortho Tool.

Reports

- Sort the Outstanding Insurance Claims report by column header.
- Receivables Breakdown report takes payment plans into account when using line-item payment plan accounting.
- Jump to a specific report page in Complex Reports.
- Enhancements to Treatment Finder Report.
- 'Unearned' provider replaces 'Include Unearned' checkbox in the Production and Income, Payments and Provider Payroll Reports.

Sales Tax: Apply a sales tax adjustment, based on a percentage, to selected procedures.

- Set a default adjustment type to apply to sales tax adjustments.

- Set the sales tax percentage to use for sales tax calculation.
- Sales Tax adjustment type added to Defintions, Adj Types when it doesn't already exist.
- Dropdown option on Adjustments toolbar button to 'Apply Sales Tax'.

Security

- Option to hide 'hidden' users in the Security window.
- MobileWeb permission restricts users from logging in the Mobile Web.
- PatPlanCreate permission logs an audit trail entry when a patient insurance plan is created.
- PatPriProvEdit permission restricts users from editing a patient's primary provider.
- PatientBillingEdit permission for changing billing type and appointment scheduling checkbox.
- Preference to require strong passwords to also include a special character.
- ReferralEdit permission restricts users from editing or deleting a referral in the Referral List.
- Permission to edit procedure notes and signature controlled by the Edit Completed Procedure (limited) permission instead of the full.
- Insurance Plan Edit permission is required to enter initial plan information for brand new insurance plan from the Add Family window.

Tasks

- Description field in Task is expandable.
- Task search preference to limit search results to 50.
- View all tasks attached to the selected patient in the Patient Tickets tab.
- Open Tickets and Patient Tickets tabs renamed to Open Tasks and Patient Tasks.
- Enhancements to task list cut and paste behavior.

Other

Enhanced Select Patient search window to return exact matches first.
Child Prophy type removed from Setup Recall and Confirmation window. Insurance plan information on the Edit Insurance Plan window divided into tabs.
View license information from the About window. Emergency contact information added as importable input fields in medical history forms.
Option to store images on an FTP site using SFTP.
Implant graphic for teeth with implants shows on the Graphical Perio Chart.
Teeth with implants are indicated with an 'i' in the perio chart.
Custom bridges can now include gender, patient's primary provider, and patient's clinic.
Categorize auto notes by folder and reorder the list.
Collapse/expand all auto notes with a checkbox.
Only the computer that starts an update and admin computers can override an 'update in progress'.
Procedure Code Tools warnings show before running a tool that will overwrite customized settings.
Plug-in framework enhanced with virtual exception method.
Choose where custom patient fields and custom appointment fields show.
Line numbers in the wiki scroll with the code text.
Speed enhancements to appointment views.
Search options added to the Problem List window.
A middle tier server can host multiple database connections.

Kiosk manager identifies each kiosk by computer name and session name.
Enhancements to keyboard controls for auto notes.
Construct a web form URL that links multiple forms together, creates a redirect, and/or associates a clinic.
Update the claim tracking status for multiple claims at once using the Outstanding Claims Report.
EDS clearinghouse uses web calls to retrieve dental claims.
New automation trigger and action can restrict ability to schedule appointments based on billing type.
Fill Sheet window control panel moved to bottom of window.
Set a default sheet to use for prescriptions printed on a single page (Rx).
Superfamilies can be sorted by sorted last names (instead of first).
Field added as an option for a message segment: 'messageTypeNoStruct'.
Patient number added as criteria that links patient clones with the original patient.
Edit Patient Information - Other tab indicates patient's clone relationship and allows user to swap or break the relationship.
Move subscriber confirmation message enhanced for clarity.
Database maintenance check for pay splits attached to deleted prepayments.
Breakdown column added to database maintenance window.
Procedures can have only one estimate per insurance plan.
Message prompts when enabling eRx enhanced.
Print tool button added to eRx interface to allow printing of Prescriber Report for Ohio requirements.
TreatPlanOrphanedProcTps DBM makes dummy treatment plans for treatment planned procedures that were once attached to a saved treatment plan that no longer exists.

PW Dental Version 16.3

Major Enhancements:

Payment Plans

- Option to customize the layout of printed payment plan terms using sheets.
- Add an electronic signature box to a custom payment plan layout.
- Payment plan terms that are saved or printed using a custom sheet layout are saved in the Images module.
- Designate a payment plan image category in the Images module.
- Choose type of payment plan (patient or insurance plan) from a Payment Plan tool button dropdown.

Task Reminders:

- Create reminder tasks that appear at a set interval daily, weekly, monthly, or yearly.
- View reminder tasks in their own tab in the Tasks grid.
- Add a reminder task using the dropdown menu on the Tasks button.
- View number of unread and read reminder tasks in the Appointments module.

Account

- Add credit cards without processing a charge when using PayConnect.
- Automatically allocate prepayment amounts to repeating charge procedures.
- DentalXChange e-statements include the New Charges field.
- Option to generate and save PDF copies of e-statements.
- Option to remove payment types from deposit slips.
- Group insurance payments by payment group.
- Void or return online payments via the Payment window, or via XWeb Transactions window.
- Manage online payment transactions via the XWeb Transactions window.
- Patients can manage credit card information used in the portal when logged into the Patient Portal (add, remove cards).
- When XCharge Decline Minimizer updates a card, the changes is recorded in the payment note.
- Support for Electronic Dental Services (EDS) e-statements.
- Preference determines whether or not a default payment type is selected when entering a patient payment.
- Preference determines whether attaching a procedure to adjustments is required or optional.
- Preference determines the default ordering provider sent in medical e-claims.

Alerts

- Alerts show in main menu.
- New service for Alerts system.
- Users can subscribe to alerts.

Appointments

- Preview the appointment schedule before printing.
- Moving an appointment only refreshes the appointment module if an appointment overlap is detected.
- In eReminders, include Time Asked to Arrive.
- Right-click option on appointment box to open the ortho chart.
- Preference to disable automation popups for 10 minutes.
- Detailed audit trail entry when an appointment confirmation status is changed.
- Define time patterns and add procedures to appointment types.
- Preference to display a warning when detaching procedures from an appointment by selecting an appointment type.
- Preference determines the default hygienist when scheduling an appointment in an operatory.
- Print routing slips from the Chart module.
- Preference to lock scheduling for specific patients.
- Enhancements to how Time Patterns are calculated on Appointments.

Clinics

- Run recurring charges by clinic.
- Sort the schedule window by clinic.
- Add a clinic abbreviation that is used in dropdowns and pick lists throughout the program.
- Clinic column added to Manage Time Card window.
- Clinic name added to header when printing time cards.
- If sending deposits to QuickBooks, the clinic selected on the Edit Deposit Slip window determines the clinic (class) sent to QuickBooks.
- Edit Claim window is read-only when the logged-on user doesn't have access to the clinic tied to the claim.
- Filter the Unearned Income Report by clinic.

Graphic Reports

- Graphic report printouts and exports include the legend.
- Graphic reports legend items can be enabled or disabled.
- Default graph tabs for providers, clinics, and practice in graphical reports.
- Export graphical reports as a PDF.
- Improved autosizing of graphic reports when groupings are selected.

Insurance

- Filter insurance plan list by plan number or Trojan ID.
- Preference to always use the UCR fee for the billed fee even if the PPO fee is higher.
- Preference to prompt users to copy the super head's primary insurance plan when adding a family to a superfamily.
- Insurance Verification List grid displays Appt Date Time.
- Option to show plans for all family members, including inactive and dropped plans, when selecting a plan for a Preauthorization or 'Other' type claim, or when changing Other Coverage information on the Edit Claim window.
- Additional warning added before combining insurance carriers with mismatched information.

MySQL

- Obfuscated MySQL passwords are allowed to pass into Practice-Web as a command line argument.
- View the current MySQL server and computer name in the Computers window.

Payment Plans

- Option to customize the layout of printed payment plan terms using sheets.
- Add an electronic signature box to a custom payment plan layout.
- Payment plan terms that are saved or printed using a custom sheet layout are saved in the Images module.
- Designate a payment plan image category in the Images module.
- Choose type of payment plan (patient or insurance plan) from a Payment Plan tool button dropdown.

Prescriptions/Rx

- Create prescriptions and print multiple prescriptions on one page.
- New sheet for RxMulti.
- Set a default printer when printing multiple prescriptions per page.

Procedure Codes

- Sort the Procedure Codes list by code.
- Progress bar may show when running a procedure code fee tool (copy, increase, update, clear, export, import).
- Insert an auto note in a default procedure note.
- Preference determines if auto note prompts are triggered when reopening a completed procedure.
- Preference to set the default procedure code list sort option.
- Preference to require the use of suggested auto codes.

Reports

- Treatment Plan Presentation Statistics report.
- Presented TreatPlan Production report.
- Filter the Daily Payments report by claim payment group.
- Progress bar shows when a complex report is run.
- Preference to show verbose history for complex report progress bar.
- Remove a provider as a selection option in standard reports.
- New Daily Transactional Net Production report.
- View unearned income in reports without a provider selected.
- Incomplete Procedure Notes report can optionally include procedures with no note or unsigned notes.
- Additional default options added to Standard Report Setup.

Schedules

- Confirmation message shows when adding time blocks if both providers and employees are selected.

- Confirmation message shows if an overlap is detected when operatories are assigned to a time block.
- Quickly move forward or back a day when viewing a day's schedule.
- When accessing a day's schedule from the Appointments module, Employee or Provider tab, option to save and go to main Schedule window.

Security

- Permission to change appointment confirmation status.
- Filter the Security window.
- Search the security permissions by Show Only category. Username is the default.
- Audit Trail permission allows access to the audit trail.
- Claim Procedure Received Edit permission allows editing claim procedures with a 'received' status.
- TreatmentPlanPresentEdit permission allows user to change the presenter of a saved treatment plan.
- Audit trail results limited to 500 entries by default.
- Audit trail entry for User Query enhanced to display user and query text when a query is run.

Tasks

- New task setup menu.
- Sort appointment type task lists by AptDateTime.
- View number of unread tasks in task popout.

Task Reminders

- Create reminder tasks that appear at a set interval daily, weekly, monthly, or yearly.
- View reminder tasks in their own tab in the Tasks grid.
- Add a reminder task using the dropdown menu on the Tasks button.
  View number of unread and read reminder tasks in the Appointments module.

Treatment Plans

- Preference determines the default method used to sort procedures.
- Sort procedures in the Treatment Plan Module by tooth or order of entry.
- View the user who saved a treatment plan.
- View and edit the user who presented a saved treatment plan.

Other

- New tabs added to Edit Patient Information window: Public Health, Other, Emergency Contact, and EHR Misc.
- When sending medical e-claims for a Medicaid carrier, the ordering provider defaults to the procedure treating provider.
- Alphabetize the Provider List by provider abbreviation.
- Add emergency contact name and number for patients.
- Set wiki home pages and open multiple pages.
- Bookmark long wiki pages.
- Sync CEMT security settings to selected middle tier connections.

- Filter MedLab results by Location ID.
- The current computer shows above the list of computer names.
- Double click a computer name to open Graphics for that computer.
- Collapse calendars on the Insurance Claims window and Procedures Not Billed to Insurance report with up arrow.
- Large enterprise organizations can request that backups during an update are disabled.
- Improvements to messaging button signaling system.
- Preference to show Podium commlogs in the patient chart.
- Specify the Schick version (4 or 5) for the Schick Dicom bridge.
- About menu option added to Help menu.
- Show tab, Tasks checkbox now shows appointment tasks in progress notes also.
- Progress bar when sending batch statements from the billing list.
- Preference determines whether or not providers and employees are selected by default on the Schedule window.
- Preference determines when aging is calculated. Only used by enterprise organizations that use Galera cluster environments to prevent possible deadlocks when running aging.
- Additional property added to Owandy bridge that use of patient number or chart number.
- Added VistaDent bridge enhancement for enterprise users in remote sessions.

PW Dental Version 16.2

Major Enhancements

Claims: Create claims for multiple outstanding procedures at once using the Procedure Not Billed to Insurance Report.

Payment Plans

- Option to include payment plan debits and credits in the patient ledger, patient balances, and aging.
- Preference turns on/off Line Item Payment Plans.
- Attach procedures (credits) to payment plans.
- Close payment plans.
- Payment plan debits can be allocated using the Payment Split Manager.

Prepayment Accounting System

- Quickly create an unallocated prepayment via the Payment window.
- Quickly allocate unallocated income amounts to completed procedures via a dropdown from the Payment button.
- When allocating prepayments, new pay splits are automatically created to balance amounts.
- New 'prepayment' option for pay split unearned type.
- Daily Payments Report has an option to include/exclude payments marked as 'unearned'.

Patient Portal and Online Payments

- Allow patients to make online credit card payments, using X-Charge, with or without logging into the portal.
    - Enter XWeb settings to enable online patient payments. Direct patients to online payments using the patient portal URL.
    - Process pending online payments in Practice-Web. Visual indicator in main menu alerts staff when payments are pending.
- PayConnect and X-Charge can be enabled at the same time.

Changes by Category
Account

- Mark specific adjustment types as 'bad debt'.
- Preference to automatically launch Pay Split Manager when there is a family balance and user clicks OK on Payment window.
- New Provider Payroll report option in production and income reports.
- Associate existing adjustments to procedures.
- Associate completed procedures to adjustments.
- Print deposit slips directly to the printer, without opening the Fill Sheet window. Create PDF option added to Edit Deposit Slip window.
- X-Charge: If using Decline Minimizer and it changes credit card information, the card information will be updated in the database. When using recurring charges the Updated count will indicate the number of cards updated.

- Credit Card Manage window indicates whether a card has a saved token or not.
- Limited statement option will only show transactions related to selected procedures.
- In the account, show canceled appointment procedure codes (D9987) in a different text color.
- Set a dunning message to send earlier than actual account age.

Appointments

- Enable or disable the appointment bubble popup by appointment view.
- New automation trigger for scheduling a procedure and new action to show a consent form.
- New automation trigger for creating an appointment and new action to set appointment type and status.
- PatientNamePref (patient preferred name) added as an option for appointment views.

CEMT

- CEMT can connect to a CEMT database hosted on a Middle Tier server.
- CEMT only allows syncing from one CEMT database.

Chart

- Deleted sheets are hidden in the Chart module, but are visible in Audit mode. Deleted sheets can be restored.
- Change the patient associated with a sheet.
- Record how long a patient has used tobacco and how eager they are to quit.
- Tobacco Use tab added to Medical window.

Claims

- Create claims for multiple outstanding procedures at once using the Procedure Not Billed to Insurance Report.
- Enhancements to Procedures Not Billed to Insurance Report.
- Option when creating batch claims to allow or block claim creation when patient procedures span multiple clinics or places of service.
- Send Claims window renamed 'Insurance Claims'.
- Access the Procedures Not Billed to Insurance Report and Outstanding Claims Report from the Insurance Claims window.
- An orange exclamation point shows next to Recalculate Estimates when recalculation of claim estimates is suggested.
- Insurance Writeoff Edit permission allows or blocks a user from editing or creating writeoffs.
- New preference determines when a snapshot of a claim's writeoff and insurance payment estimate amounts are captured (at claim creation, a set time, or when insurance payment received).
- Associate a default place of service and provider to a site.
- When procedures on a claim are assigned a site, the site's place of service, NPI and address is sent in 5010 dental e-claims.
- Confirmation message when changing a claim's tracking status to 'none' to avoid inadvertently setting a status to none.

Clinics

- Add clinic-specific holiday and practice notes to the schedule.
- Schedule view is limited to providers assigned to operatories in the selected clinic.
- Track timecard entries by clinic.
- Reorder the list of clinics.

HL7

- Add a column to the Chart module progress notes to indicate whether or not procedures have been sent via HL7.
- Option to show a warning message if procedures sent via HL7 are not attached to an appointment.

Insurance

- Option to set a different default clearinghouse for electronic eligibility than is used for claims.
- Preference to exclude patients from the Insurance Verification List if their insurance plan is marked 'don't verify'.
- Preference to exclude patient clones from the Insurance Verification List.
- Enhancements to interface and how Pat/Ins verifications are displayed and verified in the Insurance Verification List.
- Option to exclude appointments for specific clinics from the Insurance Verification List.
- When adding an insurance plan, if patient is not the subscriber, Relationship to Subscriber will default to no selection and user cannot save the plan until an option is set.

Ortho Chart

- Rename the Ortho Chart button if desired.
- Create tabs to organize Ortho chart entries.
- New Setup menu in Ortho Chart to quickly add columns.

Public Health Screenings - Custom Screening Form

- Set tooth charts to permanent or primary teeth.
- Assessment Proc checkbox adds procedure code D0191 to the patient's chart (assessment of a patient).
- Fluoride Proc checkbox adds procedure code D1206 to the patient's chart (topical application of fluoride varnish).
- Select different custom screening forms per screening group.

Security

- Edit Completed Procedure (limited) permissions restrict users from editing information on completed procedures that affects historical reporting.
- Claim Delete permission allows users to delete claims.
- Pay Split Create after Global Lock Data permission allows user to add new pay splits after the global lock date.
- Users must have the Insurance Plan Edit permission to change insurance plan information and benefit information.

- Insurance Plan Edit permission tracked in audit trail.

Sheets

- Timestamp (date and time) added for signature boxes on sheets.
- Add 'misc' input fields with reportable names to relevant sheet types.

Other

- Automatically generate pay periods.
- View scheduled providers via a tab in the Appointments module (next to Waiting Room/Employees).
- Customize the reports that show in the Reports window.
- Option to launch a custom reporting URL from the main toolbar.
- In the Email Inbox, deleting emails attached to patients only removes them from the inbox. They are not removed from the Commlog.
- If Practice-Web is shut down when a user is editing a wiki page, changes are automatically saved as a draft as long as html code is valid.
- If Practice-Web is shut down when a user is creating an email, the email is saved.
- If Practice-Web is shut down when a user is creating a commlog, the commlog is saved.
- Create a right click link to a wiki page from within a task.
- Visual indicator of last time a popup was viewed.
- Merge patients even when birthdate or names don't match.
- Enable syncing of super family member addresses and home phones.
- Unit tests for procedure downgrade insurance estimates.
- Appointment views for clinics more efficient when selecting from database.
- The MySQL password is obfuscated in configuration files.
- Patients can be associated to multiple clinics.
- Log file added to Podium folder for troubleshooting.
- DentalTek Rapid Call bridge.
- Carestream Imaging bridge.

PW Dental Version 16.1

Major Enhancements

Graphic Reports: Added color coded charts and graphs to track the growth of your practice as follows

- Track production and income, new patients, accounts receivable and broken appointments for the practice and by provider.
- Customize the reports.

Insurance Verification: New tools to track verification of insurance plans and benefits.

ERAs: Automatically download ERAs from ClaimConnect.

Security: Users can be associated with both a provider and employee.

Clinics: Users can be assigned to a default clinic and allowed access to multiple clinics.

Changes by category
Appointments

- New tools to track verification of insurance plans and benefits.
- Preference to customize the color of the horizontal red time line in the Appointments module.
- Preference to customize the behavior when a patient breaks an appointment (procedure, adjustment, commlog, all, or none).
- Preference determines whether adjustments are/are not included the Appointment module's net Daily Production.
- Customize columns that show in the Edit Appointment window, Procedures grid using Display Fields.
- Set the appointment schedule to always load to the practice's scheduled start time or the earliest scheduled appointment.
- Operatory names can wrap to two lines to accommodate longer names.
- New right click option to clear all blockouts in an operatory.
- In the Recall List, the Contact column says Text when the patient's preferred recall method is TextMessage.
- In the Confirmation List, the Contact column says Mail when the patient's preferred confirmation method is Mail.
- The Broken Appointment Procedure color in Definitions, Account Colors will apply to D9986 and D9987.

Charting

- When electronically signing procedure notes or group notes, logged on user can be overridden.
- Record vital signs from the Medical window.
- Record pulse when entering vital signs.
- Interface enhancements for medical information.
- Enhancements to signature box on Procedure Info window and Treatment Plans.
- Sign Ortho Chart entries. Indicate 'signed' entries in the Ortho Chart.

- Perio chart always starts exam on an existing tooth (not a missing tooth).
- Copy the previous perio exam to a new exam.
- Preference determines if teeth with implant procedure codes are considered as 'missing' in the perio chart.
- Preference determines if teeth marked 'missing' are automatically skipped in new perio exams.

Clinics

- Assign users to a default clinic.
- Users can be restricted to multiple clinics.
- The clinic selected in the Main Menu determines the default clinic for several actions.
- New preference determines whether the Main Menu clinic or the patient's clinic is the default for patient payments.
- Option to set the default Main Menu clinic based on the clinic last active when the user was logged on or the workstation was used.
- Lab case status in the Appointment module reflects status for currently selected clinic.
- Preference to reset the appointment schedule to today's date when a different clinic is selected.
- Clear blockouts by clinic.

Email

- Set up user-specific email addresses.
- One email can be set as the default 'From' address, but can now send from multiple email addresses.
- Emails in the inbox are filtered by email address or secure web mail.
- Save attachments in email templates.
- Choose the email address to send from when using the Recall List, Confirmation List, Billing List.
- New Edit button for email templates.
- New Edit button for email autographs.
- [monthlyCardsonFile] and [currentMonth] available as message replacement fields in email templates.

Images module

- New preferences affect the default behavior of the document tree (expanded or collapsed).
- Set specific image categories to expand by default.

Insurance:

- Automatically download ERAs from ClaimConnect.

PayConnect:

- New option for force duplication (charge the same amount to the same card on the same day).
- Mask the PayConnect password on the PayConnect Setup window and enhancements to error message when a user's login credentials are not recognized.
- Electronically sign transactions.

- Payment note after a transaction indicates type of credit card.

Public Health Screenings:

- Preference determines whether screenings use the classic form or a customized sheet.
- Customize a screening form.
- New ScreenChart sheet element added for customized screening forms.
- Sealant codes marked on a customized screening automatically insert a sealant procedure in patient's chart.

Reports

- New graphic reports interface.
- Graphical permission allows/blocks viewing graphical reports.
- Graphical Setup permission allows/blocks graphical report setup and editing.
- Updates to Broken Appointment report.
- Outstanding Insurance Claims Report can be filtered by claim tracking status.
- Create custom claim tracking statuses that exclude a claim from the Outstanding Claim Report for a certain number of days.
- Preference to wrap column text in printed reports.

Security

- Users can be associated to both a provider and an employee.
- ClaimSend permission allows/blocks sending or printing claims.
- TaskListCreate permission.
- Permission to edit or delete group notes is based on status of attached procedures.
- Strong passwords now require at least one lowercase letter in addition to one uppercase, one number, and at least 8 characters.

Smoking and Tobacco Use

- New options to assess Tobacco Use.
- Option to mark an intervention as 'Patient Declined'.
- New display field for Tobacco Use in ChartPatientInformation shows patient's tobacco use history. Double click Tobacco Use to open the assessment window.
- Education resources can be triggered based on assessed tobacco use.

Superfamilies

- Preference to determine the sort order for guarantors in a superfamily.
- Create super statements that show balance information for all superfamilies.

General

- Create pick lists in a sheet using the Combobox sheet element.
- Set a workstation to use local time instead of server time.
- Preference determines which provider recurring charges are applied to.
- Show providers that were removed during a merge of providers in the Provider List.
- Treatment plan note saves when focus leaves the text box.
- Add quick paste notes to Treatment Plan Notes.

- The term 'Archive' replaces 'Delete' in the wiki.
- Save a wiki page as a draft.
- When a workstation loses connection with the database, user is notified and Practice-Web attempts to reconnect.
- Provider and Employees sorted into tabs on Schedule and Edit Day windows.
- Scheduling has better performance when many people are editing the same day.
- Set default claim notes by procedure code that are automatically copied to new claims.
- Database maintenance interface enhancements. New RawEmails tool.
- Report option in main menu has a new dropdown for standard reports, graphic reports, and user query.
- Import 834 files.
- Option to hide Podium, Central Data Storage, and DentalIntel program link buttons.
- Filter Podium bridge by clinic.
- Choose the action that triggers Podium review invitations and the time intervals.
- Clear Ray bridge.

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.

Send Claims window

- 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. Electronic EOBs (ERA 835)

- 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.