

## Practice-Web Version 20.5

### Major Changes

**Paint Types:** Created new paint types for more tooth chart customization.

- New paint types created for *Space Maintainers* and *Retained Root*.
- Paint type Watch changed to Text

**Appointment Module:** New buttons to jump appointment calendar 3, 4 or 6 months.

**Discount Plans:** Added effective dates for Discount Plans.

- Added subscriber level effective dates for Discount Plans.
- Effective date included in Discount Plan Report.

### Changes by Category

#### Appointments Module

- Modifications to look of ASAP list.
- In the Confirmation List, option to send one confirmation request per family.
- *Go to Appt Date* automatically selects an appointment view that contains the appointment operator.
- Estimated Patient Portion includes Treatment Plan discounts in the Edit Appointment window.

#### Account Module

- Claims paid As Total can be automatically split to procedures.
- Option to pay on principal for Dynamic Payment Plans.
- Account Module preference to specify if negative production can be transferred as income.
- Preference to hide income transfer manager.
- Automatic sales tax.
- As Of date added to Income Transfer Manager
- Statement number can be added to Statement Sheet.
- Payment type now displays on hidden splits.
- Treatment planned prepayments made to super family members now show in the Patient Account tab of the paid by account.
- Income Transfer Manager fixes treatment planned prepayments that have been detached or deleted.
- Preference not to re-run declined cards on recurring charges.
- Late charge feature.
- Recurring Charge Month window now opens anytime *Apply to Recurring Charges* is checked.
- Custom sheets can be associated with statements, limited statements, invoices, and receipts.

#### Chart Module

- Adding rows to Ortho Chart prompts for date and provider.
- Chart Module tab changes to combine missing teeth and primary into one category.
- Custom text can be added to Tooth Chart.
- DoseSpot eRx requires height and weight for patients under the age of 18.

#### Family Module

- Preference for Same for Entire family to all remain unchecked.
- Added *None* option to Exclude Automated Msgs settings for easier removal of previous exclusions.

### Imaging Module

- New Imaging Module Preference for PDF's to always display in a separate PDF viewer.

### Manage Module

- Alert when supplemental backup is successfully created.
- Transworld warns user when an account with outstanding claims is sent to collections.
- Passwords in the *ebill* table are encrypted.
- Emails from Gmail can be automatically downloaded to the email inbox.
- Enhancements when removing old data.
- DentalXChange statements have the option to include *Adjust* in the description for adjustments.
- Filter time clock by employee name.

### Reports

- Added end date filter to Treatment Finder Report.
- Discount Plan report shows effective dates and term dates.

### Security

- Audit trail tracks when sheet information is imported.
- Audit trail entry when a user adds or edits a state abbreviation.
- Associate CEMT users with providers, employees, and DoseSpot User IDs.
- CEMT option to log in automatically via Middle Tier.
- Single sign-on for CEMT.
- Program links mask passwords.

### Tools

- Ability to hide column in wiki list.
- Option to archive patients in the Patient Status Setter.
- Ability to create certifications for employee training.
- Database maintenance method for ProcedurelogProvNumMissing includes breakdown.
- Choose an active instance of Practice-Web to shutdown or shutdown all at once.

### Miscellaneous

- Allow selecting Treatment Planned Procedures to pass into Consent Forms and Lab Slips.
- About window includes database name.
- PaySimple partner link updated.
- Check Insurance Plan Fees window can be printed.
- Check Insurance Plan Fees window expanded to include *ManualBlueBlook* Fee Schedules.
- Checkbox to save outgoing requests to DentalXChange Attachment Service.
- DentalEye bridge enhanced to allow DentalEye Version 3.3.
- Radio groups on sheets can have custom values.
- Registration key form displays all licenses.
- Ability to sort patients when launching Trophy bridge.

# Practice-Web Version 20.3

## Major Changes

**2021 CDT Codes:** The 2021 CDT codes are available in version 20.1.58 or higher.

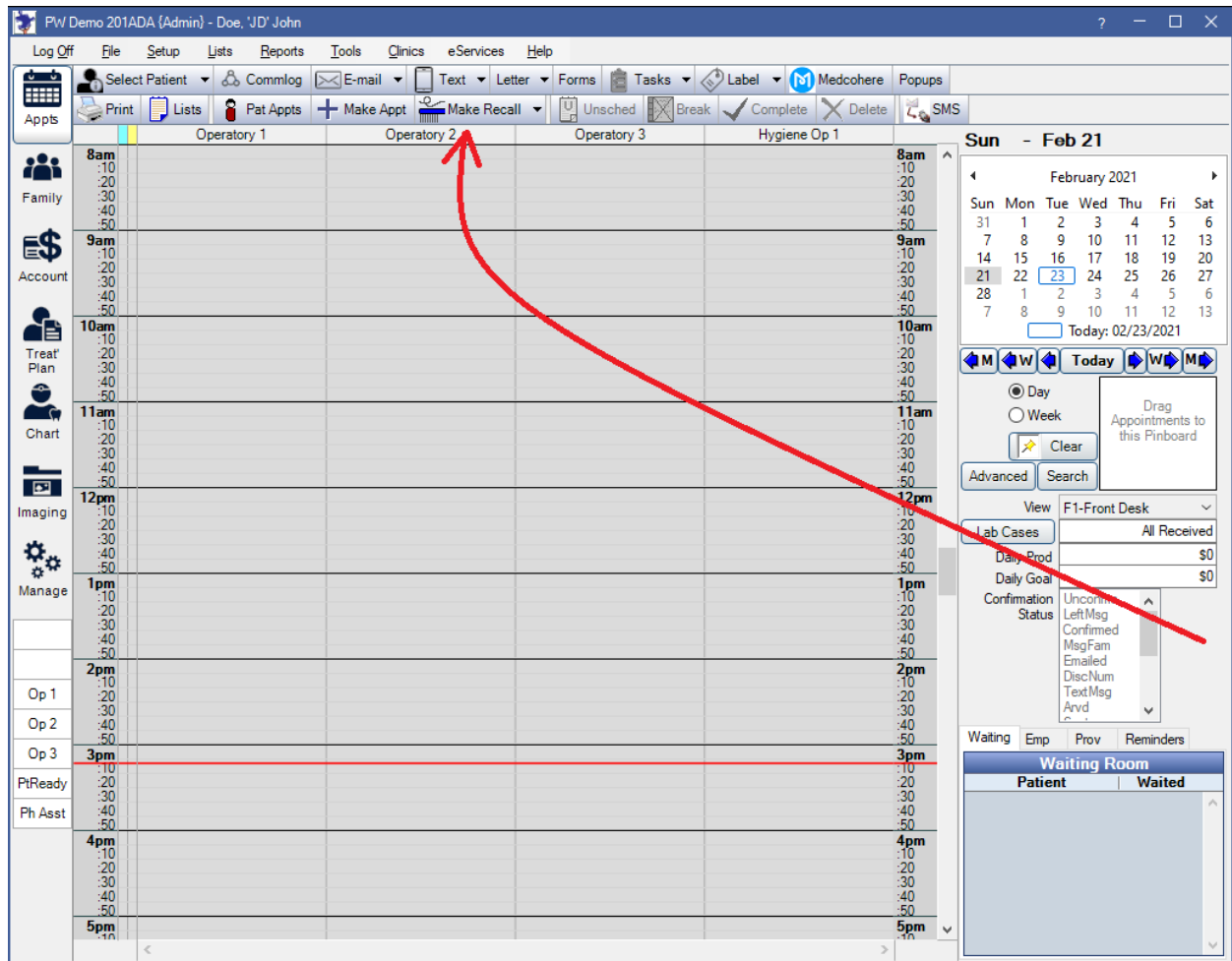
**Updated Blue Book Feature:** The improved Blue Book feature makes estimates easier than ever for your out-of-network insurance plans.

- As claims are received, enter the allowed fees to improve estimates for future procedures.
- Set up preferred Blue Book calculations.

**Language Translations for Web Forms:** When language translations are created for sheets, patients can select their preferred language when filling web forms.

**Patient Responsibility Column:** Now available in Edit Claim and Enter Payment windows.

**Appointment module buttons realignment:** Appointment related buttons were moved to the top tool bar for easier access.



## Changes By Category

### Account Module

- Assign a Payment Type override to individual Recurring Charges.
- Account Module preference disallows primary claim status to be marked as 'Hold Until Pri Received'.

### SmartTools:

- Send mass emails through pwNewsLetter.
- Added Emojis support and other enhancements to pwConnect Texting service.
- Online Web Scheduling is available as a separate service

### Security

- Date limitation added to Payment Create permission.
- Added security setting to allow users to edit their own time card in the current pay period.
- Added security setting for clinic users to maintain selected patient when logging off.

### Miscellaneous

- Enhanced security so providers must be associated with a user to access PDMP.
- Added fields to send electronically on HCFA 1500 Claim Form.
- User setting to show existing other color on tooth chart when a different provider in the practice completed work.
- Automatically load task search when searching by tasknum.
- Appointment buttons moved to top of Appointment Module.
- Enterprise preference to turn off email address auto-complete in Edit Email Message window.
- Daily Production, Production and Income report, and Monthly Production Goals reports calculate treatment plan discounts into adjustments.
- Filter out archived wiki pages when adding internal links.
- Changing the referral associated to a patient logs an entry in the Audit Trail.
- Determine level of data sent to secondary insurance carriers.
- Customize border color for windows within Practice-Web.
- Quickly organize fee schedules by selecting its placement in the list.
- Added shortcut to open the wiki.
- Updates to graphic preferences.
- Automatically save patient forms to the Imaging Module.
- Double-click a provider or employee to quickly view their schedule.

## Practice-Web Version 20.1

### Account Module

- Simplified Income Transfer Manager to allocate all credits to outstanding charges.
- Ability to determine when interest begins charging on payment plans.
- Create a Dynamic Payment Plan on an Ortho Case.

### Chart Module

- Chart Module preference to force a user to be a provider to sign a note.
- Log in added to Ortho Chart.
- Tooth Chart button to clear movements for selected teeth only.
- 3D Tooth Chart rewritten from scratch to use DirectX 11 instead of DirectX 9. This makes installation easier and it works better.

### Images Module

- Ability to merge Image Categories.
- Image mounts for radiograph and photo collages.

### Manage Module

- Accounting report for Profit and Loss.
- Updates to Accounting Balance Sheet.

### Reports

- Ability to print page range in Audit Trail and User Query windows.
- Report for overpaid payment plans.

### Security

- Ability to copy a user.
- Audit trail entry when merging discount plans.
- Log off time user override moved to Security.
- Patient level audit trail for insurance plans.
- New permissions for editing completed procedures.

### Miscellaneous

- EDS Medical added as option for medical clearinghouse.
- Updated PreXion Bridge and added Prexion Aquire.
- Enhancements to appearance of Show Features.
- Showing inactive patients in the Patient Select window defaults to on.
- Prompt before closing Practice-Web.
- Changes to appearance of Edit Appointment Window.
- Slow Query Log added for troubleshooting.
- Paste a file when using DentalXChange Attachment Service.
- Language translations for sheets.

## Practice-Web Version 19.4

### Account Module

- Income Transfer Manager includes checkbox to include hidden paysplits.
- Zero dollar payments show in patient account when they make a payment for a patient in a different family.
- New output field for payment plan sheets to show masked credit card number.
- Payment window now has a separate tab for treatment planned procedures.
- Ortho Case feature.

### Appointments Module

- Preference to force a user to break an appointment before moving, deleting, or sending to the unscheduled list.
- Hygiene time added to appointment time bar.

### Clinics

- CEMT connections allow option to enable or disable clinic breakdown on reports.
- Provider overrides use default values if no clinic information is entered.
- Preference to unhide patients in a restricted clinic.
- Fee schedule grouping.

### Family Module

- Preference to mask a Social Security Number.
- Preference to mask the patient birthdate.
- New window to easily add multiple email addresses for a patient.
- Added checkbox when consent is given to DoseSpot for access for medical history.

### Manage Module

- UNC paths can be immediately accessed from tasks.
- Ability to mark supply orders as received.

### Security

- Audit trail entry when an insurance payment or write-off is edited.
- Audit trail entry when fees are changed in a fee schedule.
- Audit trail entry when Social Security Number is viewed.
- Audit trail entry when birthdate is viewed.
- Set logoff time per user.
- Added MySQL Manager to manage MySQL users and passwords.
- MySQL installations allow option for blank password.

- Security permission for the ability to view Social Security Number.
- Security permission for the ability to view a patient birthdate.
- Permission tree visible in User Edit.

### **Treatment Plan Module**

- Preference to prompt for a name when saving a treatment plan.
- Arch specific CDT Codes default to correct arch when treatment planning.
- Added display field for UCR Fee on Category Percentage plans.

### **Miscellaneous**

- Ability to clear provider colors.
- Ability to clear carrier colors.
- Lab cases allow invoice numbers for reporting.
- Option to save lab slips to the Images Module.
- New growth behavior options for Chart Layouts.
- Allow a user to move the help button in the title bar.
- Ability to import and export auto notes.
- Report setting to allow hidden splits on the Daily Payment Report.

## Practice-Web Version 19.3

### Appointment Module

- Complete overhaul of drawing logic for smoothness and speed
- Custom font size on appointments.
- Appointments can overlap in an operator.
- Horizontal scroll.
- Sort Recall List by type.
- Right-click option to add autonotes to an appointment note.
- New preference that can blocks changing appointment status or detaching procedures.
- Change width of provider bar on left of appointments.
- Add text to provider bars.

### Account Module

- Exclude options added to Finance Charges.
- Filter added to Payment window to show only explicitly paid balances.
- Recurring Charges allow user to pick the day in addition to the month.
- Added character limit to narratives sent via the DentalXChange Attachment Service.
- Dynamic Payment Plan.

### Chart Module

- Procedure Info window displays primary teeth when selecting a tooth range.
- Clinic level defaults for Chart Layouts.
- Allow the same Ortho Chart display field to set different column widths per ortho chart tab.
- New perio path option.

### Manage Module

- Archive a task list.
- Display patnum on tasks when patient is attached as object.
- Removed Show Credit Card Info from Manage Module Preferences.
- Supplemental Backup tool.
- Click to sort columns in Send Claims window.
- Additional columns added to Send Claim window.

### Security

- Audit trail entry when assignment of benefits change for an insurance plan.
- Additional information added when auditing Repeating Charges.



## Miscellaneous

- Program links can be enabled by clinic.
- Reports can be printed by page range.
- Is Hidden column added to Laboratories window.
- Apteryx XVWeb allows option for Image Quality.
- Sheets windows renamed to be more consistent.
- Added the Query Monitor.
- Module preferences renamed to be more consistent.
- Character limit increased to 225 characters on Employer field in Insurance Plans.
- Added checkbox in Provider Setup window to show patient count.
- Ability to set Web Sched Recall provider rules by clinic.
- Sheet Field Defs can have a Y value greater than 2,000.
- Redesigned module preference windows.
- Themes changed to only include icons.
- Ability to search the Provider List.
- Option to show provider column on unearned income reports.

## Practice-Web Version 19.2

### Account Module

- Improvements to Income Transfer logic.
- Preference to allow prepayments to attach to treatment planned procedures.
- Preference to apply a procedure's credits to the procedure's charges before aging.
- Preference to allow a recurring charge to process when patient has no balance or a credit.

### Appointments Module

- Copying schedule no longer overwrites holidays.
- View production per operator.
- Past due option added to appointment views.
- Preference to prevent changes to completed appointments with completed procedures attached.

### Chart Module

- Emails allow for raw HTML templates.
- New command options for Voice Perio Charting.

### Insurance and Claims

- ADA 2019 claim form added.
- Eligibility requests include insurance history dates.
- Ability to automatically import electronic eligibility and benefits.
- Custom claim tracking copied to split claims.
- Better handling of primary and secondary claims that allow procedures marked as *Do Not Bill to Ins.*
- Fields added to 1500 claim form for Current Illness, Injury, or Pregnancy.
- Allow batch attachments through DentalXChange.

### Treatment Plan Module

- Additional options for Treatment Plan display fields.
- Visual indicator in Treatment Plan when procedure is attached to an appointment.

### Manage Module

- Excluded tab added to TSI interface.
- Re-enabled the Archive Tool.
- Time card notes now print first two lines.
- Preference to allow total payments when processing an ERA.
- Ability to filter ERA by the Control ID.
- Reminder tasks are now tracked in the Audit Trail.
- Added the ability to filter task lists by one or more regions or clinics.
- Output text field created for cash payment on deposit slips.

## Advanced

- Bridge to Illinois PDMP.
- Bridge to XDR now allows location ID to be entered.
- Scheduler system for running processes at a set time/date.
- Database Maintenance logs saved to the FreeDentalimages folder.
- Renamed *Aging is enterprise* preference to be more specific.
- Added ability to include procedures when creating appointments.

## Miscellaneous

- CDT 2020 procedure codes added
- Additional write-off options on reports.
- Abbreviation display field added to Planned Appointments.
- Default patient dashboard updated
- Refresh option added to Patient Dashboard.
- Spell check will be disabled with foreign languages using an IME keyboard.
- Report to track hidden paysplits.

## Practice-Web Version 19.1

### Appointments Module

- Improvements made to appointment search.
- Warning message when replacing provider schedules.

### Chart Module

- Dynamic layout for Chart Module.
- Save button added to Exam Sheets.
- Commlog types can have color attached.
- Patient Dashboard.
- Screening sheets allow more procedure codes to be charted via checkbox.
- Pagination system for progress notes.

### eServices

- Offices can assign a local phone number for outgoing text messages.
- Send text message to all patients on schedule for the day.

### Insurance

- Ability to delete an ERA.
- Enhancements to electronic benefit requests.
- Added frequency limitation for number of services per 12 months.
- Option to replace existing insurance plan by importing a new plan.
- Claimstream users can send claims to carriers on the Instream network.
- Enhancements to DentalXChange attachment service.

### Reports

- Enhancements to Claims Not Sent report.
- Clinic abbreviation used in report columns.
- New Report for overpaid procedures.
- Added Monthly Production Goal report.
- Reactivation list added to Recall.
- Added permission for New Claim button in Procedures Not Billed to Insurance report
- Simplifications made to Insurance Aging report.
- Updated filters on Recall List.

### Manage Module

- Section for notes when editing pay periods.
- Dunning Messages for Superfamilies when billing.
- Enhancements to task lists.

- Task lists can be filtered by clinic.

### **Treatment Plan Module**

- Treatment planned procedures marked as Do Not Bill to Ins will show an X in the allowed fee column.
- Second signature box for treatment plans.

### **Advanced**

- Enhancements to Middle Tier.
- Added error code for crashed table exceptions.
- Income Transfer tool for multiple families.

### **Miscellaneous**

- Created a new Help System.
- Integration with Oryx.
- Additional clinic overrides for providers.
- Enhanced audit trail for aging.
- Enhancements to limited statements.
- New recall type for exams.
- 2019 ICD codes added.
- Associate providers with clinics.
- Preference to allow each user to select their own theme.
- Ability to pause or cancel Global Update Write-off Estimates tool.
- Search feature for Schedule Day Edit.
- Allow repeating charges to use specific unearned type.
- Link adjustments to paysplits.
- User specific settings for email setup.
- Laboratories can now be marked as hidden.
- Enhancements to billing output files.
- Add warning when sending electronic statements for all dates.
- Added filter to billing list for 'Exclude if unsent dental procedures'.
- Keyboard button added to Select Patient window.
- Search preferences added for enterprise users.
- Preference for enterprise users to disable 'None' appointment view.
- *PaymentCreate* permissions now required for income transfers.

## Practice-Web Version 18.4

\*Version 18.4 requires Microsoft .Net Framework version 4.5.2, and 3.5. Here is a link to [dotNET 4.5.2](#) (Microsoft website). A minimum 1280 x 960 resolution is required for the monitors. Please evaluate your monitors before the upgrade.

### Changes by Category Appointments Module

- Automatically detach treatment planned procedures from completed appointments.
- When block appointment scheduling blackout types are added on top of an existing standard blackout type, the standard blackout type will be removed.
- Enhancements to Unscheduled List.
- Filter ASAP list by procedure code.
- Add functionality to the Recently Contacted tab in Recall.
- Prompt user when making an appointment if an unscheduled appointment exists.

### Chart Module

- Procedure Status for *In Process*.
- Easily chart quadrant procedures.
- Right click procedure to set to EO or EC status.
- Additional fields added to the Edit All Procs window.

### Insurance

- ERA write-offs posted by plan type.
- Split Claim option added to ERA payment window.
- View ERA's and EOB's from Edit Claim window.
- Enhancements to frequency limitations.

### Preferences

- Additional options for themes.
- Preference to not recalculate insurance estimates when a claimproc is *Received*.
- Preference for number of days to automatically refresh the Appointment Module.
- Preference to select payment type for recurring charges.
- Preference to remove All as an option for many clinic boxes.
- Preference to bill UCR fee and mark non-covered services as "do not bill to insurance".
- Setup window for enterprise users.
- Automate Repeating Charges tool.

### Security

- Permission for Insurance Verification.
- Permission for *Production and Income - View All Providers* now applies to graphical reports.
- Improve security in the Log On window.

- Enhanced audit trail entries for blockouts.
- Prompt to create a username and password for MySQL.

## **Sheets**

- Enhancements to default Medical History sheet.
- Enhancements to Exam Sheets.

## **Miscellaneous**

- Wireless phone and text options added to Add Family window.
- Export accounting entries and reconciles.
- Connect to older versions of Practice-Web databases from a workstation without upgrading the database to the current workstation version.
- Archive tool uses verification process to prevent archiving to the wrong database.
- Tool to mark unused Fee Schedules as hidden.
- Integration with DentalXChange's Patient Credit Score Services.
- Credit Card Edit window allows quick paste notes.
- FHIR users can update appointment confirmation statuses.
- Automation action to change patient status.
- Spell check improved.
- Prevent blank Rx sheets from printing.
- Message appears to warn a user when allocating more unearned income than is available on the account.

## Practice-Web Version 18.3

### Major Changes by Category

#### Account Module

- Closing a payment plan will no longer remove remaining future adjustments.
- Provider column added to Payment Plan Procedures and Credits window.
- Warning occurs when a procedure's provider is different from the payment plan's provider.
- Speed enhancements.
- Preselect specific payment plan charges or adjustments when entering a new payment.
- XCharge, PayConnect, and PaySimple can be enabled at the same time.
- *Prevent saving new cards* option determines whether new card information can be saved and whether new transactions can be processed.
- Credit card security code (CVV) and zip code can be entered on PayConnect transactions saved tokens.
- ACH option added for Pay Simple.
- Option to automate recurring charges.
- Recurring charges will now stop when Practice-Web is shut down. [C](#)

#### Appointments

- Overlapping appointments indicator.
- Appointment search by blackout type. Add NetProduction to an appointment view to show Daily Production in the Appointments module.
- Speed enhancements for clinic appointment search.
- Search results limited to providers on the schedule for the selected appointment view.
- Add broken appointments to the ASAP list.
- Set a default date range in the unscheduled list.

#### Clinics

- Clinic filters added to ERA and Appointments for windows.
- Restrict users to only view procedure code fees from their clinic.
- Preference added to print statements alphabetically instead of by clinic.
- Speed enhancement made to the recall list when using clinics.
- *Unrestricted Search* permission allows users who are restricted to a specific clinic to search all patients in the database. They can also change a patient's clinic from the Edit Patient Information grid.
- Time required to generate statements for multiple clinics has been reduced.
- Limit to Ops in Clinic option added to Schedule Setup window. Quickly selects all providers and employees associated with the selected clinic.
- Options to *Clear All Blockouts for Day, Op only, Limit to Ops in Clinic Filter, or Clear All Blockouts for Day, Clinic only* added to right-click menu on Appointments.

#### Insurance

- Account Module Preference to *Exclude 'None' as an option on Custom Tracking Status* for custom claim tracking.



- New ERA matching logic. Eras will now better match to claims.
- Reportable Insurance Filing Code definition category for use with the insurance filing code window and edit insurance plan window.
- Preference to disallow write-offs greater than the procedure fee.
- Insurance plan level substitution codes.
- New popup allows option to automatically change from hold to waiting to send when the primary claim is received.
- Indicator added for ERA manual claim selection.
- Ability to change width and height of printed claim forms.
- *Ins Fee* column in claim edit renamed
- Additional frequency limitation categories.
- Frequency Checking tab in Treatment Plan Module Preferences. Set the codes that are affected by each frequency limitation category.
- Sealant Through Age option added to Benefit Info window.
- Mark fields on the Edit Insurance Payment as required.
- New preference to allow, warn, or prevent users from creating claims with \$0 procedures.
- Option to not calculate PPO write-offs on downgrades.
- Show HTML view panel for EDS eligibility requests (271s).
- Prevent sending secondary insurance claims by carrier or by insurance plan. *Do not send claims electronically* checkbox on the Edit Carrier window and Edit Insurance Plan window changed to Send Electronically dropdown with three options (Send claims electronically, Don't send claims electronically, Don't send secondary claims electronically).
- Waiting Period benefit type.
- Print button added to the ERA procedure paid window.
- Preauthorization estimates update when ERA835 pre-authorizations are processed.
- ERAs check the procedure statuses on a claim when determining if a supplemental payment is needed
- When selecting a subscriber, patient status shows next to patient name.
- Add a discount plan indicator to an appointment view and/or appointment bubble.
- Preference added to set how blank entries in fixed benefit fee schedules are handled.

## Payments

- \$0 dollar entries now allowed in both the Account module and Manage module, Accounting.
- Account Module Preference, *Enforce Valid Paysplits-Enforce Fully* now requires payment credits on payment plans to be attached to procedures or have an unearned type.
- Allow Recurring Charges to run more than once per month.

## Reports

- Unearned patient income column added to the provider, monthly, and annual production and income reports.
- Referral analysis report now determines new patients based on the patient's first completed procedure date.
- Group and filter the Insurance Aging Report by carrier or group name.
- Option to only view preauthorized claims in the Outstanding Insurance Claims report.

- Procedure Codes report renamed to Procedure Codes - Fee Schedules.
- Procedures Not Billed to Insurance report includes a right-click *Go to Account* option. Report can stay open while working in other windows.
- PayPlan Credit and Production - PayPlanCredits columns added to Receivables Breakdown report when the Account Module Preference, Pay Plan Charge Logic is set to *Age Credits and Debits*.

## Supply Inventory

- Track shipping charges in the Supply Orders window.
- Interface changes to the Supply Orders window.
- Quickly add all supplies on the shopping list to a new or pending order.
- Track who placed an order in the Supply Orders window.
- Supply inventory auto-calculates quantity when adding to order.

## Prescriptions

- Import/Export medication lists.
- Added patient instruction field to prescriptions. Includes new RxInstruction sheet type and automation trigger.

## Security

- Archived Patient Edit permission to lock the Edit Patient Information window for archived patients.
- Add Audit trail for *changes to fees* when using copy function.

## Bridge Enhancements

- Program link added for Panda Perio Advanced.
- Program link added for Midway Dental Supply.
- Additional replacement fields for custom bridges.

## Miscellaneous

- Added referral.address, referral.cityStateZip, referral.FLName, and referral.LName Output Text Fields to routing slips.
- Improvements made to the DoseSpot registration form.
- Option to alphabetize definition categories.
- Tasklist search and 'My Inbox' option added to Add Task window.
- Statements use sheets preference removed. Statements will use sheets by default.
- Time card daily calculations now exclude the current day when it falls in the same pay period being calculated.
- Option to run aging for accounts with charges posted by repeating charge tool.
- Sorting options added to quick paste notes.
- Quickpaste notes pull from multiple categories.
- Added Date Bal Began and Days Bal Began to the available display fields for the Transworld A/R Manager sent and unsent grids.
- HTML email templates.
- Additional methods added at the patient level.

- Preference to disable saving attachments to the Image Module when using the DentalXChange Attachment Service.
- HTML formatted emails added to send emails with embedded images, tables, different text color, fonts, headings, and links.
- Enter a term date for a provider to restrict sending claims, sending prescriptions, and scheduling or completing appointments. Stop button finishes current DBM and cancels the queued tools.
- Improved billing summary window to include billing error details.
- Add time card rules that prevent employees from clocking in before a designated time. *Allow paid 30 minute breaks* preference determines whether break time is considered paid or unpaid, and whether the Break option is available in the Time Clock.
- Exam sheet enhancement to warn users before overwriting changes others have made while the window is open.
- EstPatientPortion added as an output text field for routing slips.
- EstPatientPortion added as an available field for the Edit Appointment window.
- Referral.nameL added as an output text field for Referral Letters.
- Alphabetize quick paste notes within a category.
- Diagnostics button added to About window to show user general system settings.
- Accounting entries are no longer created for income transfers when Auto Payment Entries is set up.
- Receive a warning when provider schedules overlap.
- Minor changes to the Copy/Paste section in Schedule Setup.
- Search progress notes for a specific word or phrase.
- Security permissions reorganized in the Security window.
- Enforce Clinic Specialty option added to Appointments Module Preferences.
- Option to show patient specialty in the main title bar and patient select area of the Account module.
- Specialty added as available field for the Select Patient window and Chart Patient Information areas.
- Days of supply in the Edit Rx window can now handle partial days.
- Option to Show patient account numbers in the Transworld AR Manager. (ArManagerSentGrid, ArManagerUnsentGrid).
- Audit trail entry when a user changes a user group's permissions or changes a user's group.
- Integration with DentalXChange Attachment Service.

## Practice-Web Version 18.1

### Major Changes

- Enter a term date for a provider to restrict sending claims or prescriptions, and scheduling or completing appointments.
- New Patient Status Setter tool to inactivate patients that have not been in for a specified time.

### All Changes by Category

#### Account

- Account Module Preference to 'Allow prepayments to providers'.
- Manage Module Preference to 'Insurance Payments to Show auto deposit'. When enabled, an 'auto deposit' will be made when entering a claim payment.
- Auto Deposit Account definition for use with auto deposits of claim payments.
- When creating an invoice, user can select payment plan charges.
- New Pay Plan Logic option for 'No Charges to Account (rarely used)' causes payment plans to have no affect on account balance.
- 'Show Proc Breakdown' option is now user specific.
- Make negative adjustments on payment plans.
- Account Module Preference to 'Age negative adjustments by adjustment date'.
- Account Module Preference to 'Allow future dated transactions'.
- New Definition for Payment Plan categories.
- Category column added to the Account module Payment Plan grid indicates a payment plan's category.
- Force unearned types to match the attached paysplit's unearned type when there is not one previously set.
- Negative (offsetting) prepayments are now required to be attached to their original prepayments.
- Sync providers when prepayments are attached to payment splits.
- Commlog auto save preference moved from Chart Module Preferences to Account Module Preferences.
- Update the Sent status when the user prints a statement from the Fill Sheet window.
- Combo boxes used in custom statement sheets show on printed and saved PDFs.
- When creating an invoice, user can select payment plan charges.
- New output text fields for invoicePayPlanLabel and invoicePayPlanValue.

#### Chart

- Chart Module Preferences divided into two tabs: Behavior and Appearance.
- Chart module preference for Prompt for Planned Appointment.
- When a procedure has a treatment area of sextant or arch, user must select an arch or sextant when charting the procedure.
- The Chart module's Signed column will now indicate when any form has been electronically signed.
- Chart module speed enhancements.

- New automation trigger option, RxCreate, when creating a prescription that is a controlled substance or requires a procedure code.

## Clinics

- When copying fees, select multiple clinics as the 'Copy To' criteria by using the clinic picker [...].
- Enter a unique DEA number for each provider/clinic combination.
- Enter a unique DoseSpot User ID for each provider/clinic combination.
- When clinics are on, option to force user to select a default clinic when adding a patient.
- Retrieved web forms are filtered by clinic.

## Insurance

- ERAs that are split by procedure can be matched and processed together.
- Tooth range added to box 24A of the medical claim form (System and Teeth).
- The Batch Insurance (EOB) window carrier filter now finds all carriers that contain the search term.
- Option to enable/disable ERA downloads for ClaimConnect or Electronic Dental Services (EDS).
- New PPO Fixed Benefit plan type for insurance plans.
- New FixedBenefit type for Fee Schedules.
- New option on the Clearinghouse window to retrieve reports at a set time.

## Reports

- New Discount Plan report.
- Incomplete Procedure Notes report is non-modal.
- Proc Code column added to Claims not Sent report.
- Broken Appointments graphic report allows user to select D9986, D9987 or both.
- Enhancements to the Finance Charge Report.
- Run released query favorites via the main menu, User Query sub menu.
- In the Appointments report, view appointments scheduled using Web Sched ASAP.
- W/O Est column renamed W/O Change and behavior updated.
- Check box on the Aging of A/R report to 'Age negative adjustments'.
- Option to prompt user to enter variables (SET statements) when running a query favorite.
- Custom aging report does not include patients with a status of deceased.

## Security

- In the main menu, the Setup, Security menu option has sub menu options: Security Settings (opens the main Security window) and Add User (add a new User Security Profile). Add User permission allows user to add a new user security profile via the Add User menu option, even if they don't have the Security Admin permission.
- In Global Security Settings, set a default user group to apply to new users added via the Add User menu option.
- Edit EO or EC Procedures permission controls whether or not a user can edit procedures with an existing other or existing current status.
- Single sign on available when using the Middle Tier.

- View Claim permission controls whether or not a user can view and create claims.
- Treat Plan Sign permission controls whether or not a user can sign a treatment plan.
- Discount Plan Edit permission is tracked in the audit trail.
- Repeating Charge Tool permission controls whether or not a user can run the repeating charge tool.
- A password is required when adding a new user and passwords must be 'strong'.

## Treatment Plan

- Option to add a PPO/Allowed Fee column to Treatment Plan grid.
- Create planned appointments from the Treatment Plan module. [Planned](#)
- In Definitions, the Treatment Plan Priority category will display item order in second column.
- PatPortionEst output text field available for treatment plans using sheets.

## Miscellaneous

- When using Letter Merge, set the default Image category for generated letters.
- Flag a carrier to reverse electronic co-insurance benefit percentages.
- New Miscellaneous Setup option for 'Middle tier server caches fees'.
- Columns added to the Accounting Transaction History window.
- Date added to the printed accounting reconcile report.
- Option in the Recall List to view patients whose recall type conflicts with the procedures on a scheduled recall appointment.
- In the Recall List, the Recently Contacted tab lists patients who have been sent a recall reminder within a date range.
- Tasks can be sent to multiple task lists.
- Middle Tier speed improvements.
- Exam sheets can remain open while working in other windows.
- Quickly view and print employee schedules from the Manage module.
- Overhaul of the Reseller Portal.
- Copying a task will also copy task number and patient number.
- Mark as Read right click menu option for tasks.
- When searching tasks, option to use a report server to avoid slowness.
- View daily production goals in the Appointments module.
- Ortho Insight 3D Bridge.
- When using Podium and a patient's Text OK status is set to No, an invitation will be sent via email if patient has an email address.
- The Backup tool has a new Archive tab. Enhancements to interface.
- Updates to how the Appointments module is refreshed.
- Option to hide DBM methods.
- ProcedureLogTPAttachedToClaim DBM moved to Old tab.
- InsSubNumMismatchPlanNum DBM moved to Old tab.
- ProcedurelogMultipleClaimProcForInsSub DBM moved to Old tab.
- DateNoZeros DBM moved to the Old tab.
- Windows F10 key functionality is suppressed main modules.
- Diagnostics button added to the About window. Shows general system settings.

## Practice-Web Version 17.4

### Major Changes

**DoseSpot:** New ePrescribing option with DoseSpot. Features two-way medication syncing, proxy clinicians and provider notifications for prescriptions ready to send.

### Account Collections using Transworld Systems Interface:

- Send past due accounts to collections using the Transworld program link.
- Manage accounts in the Transworld window, including suspending and cancelling collections.
- Accept payments directly through Transworld.

### Changes by Category

#### Account

- Preference to 'Allow storing credit card numbers' removed from Account Module preferences.
- Add adjustments for multiple procedures using Add Multiple in the Adjustment dropdown or by right-clicking the Account module grid.
- Credit filter added to Add Multiple window.
- Preference to allow/block emailing of credit card receipts when entering a patient payment.
- Set a default processing method for PayConnect in the program link. [S](#)
- Enforce Valid Adjustments preference can force adjustment provider to match attached procedure.
- View number of patients attached to a discount plan in the Discount Plans window, Pats column.

#### Alerts

- Alert notifies user when the MySQL server has more than half the allowed connections.

#### Appointments

- Unscheduled and planned appointments, as well as recalls, can be marked ASAP and added to the ASAP list.
- Option to create blackout types that do not allow appointment scheduling.
- Option to create blackout types that do not allow cut/copy/paste.
- Create and edit "No Schedule" and "Don't cut copy paste" blockouts without the blackout permission.
- Appointment module preferences have been divided into two tabs: Appearance and Behavior.
- Preference to set a default length for appointments without attached procedures.
- Add scheduling notes per provider. Notes are visible in the Appointments module when clicking on an operator header.
- Add scheduling notes per clinic. Notes are visible in the Appointments module when clicking on an operator header.
- Options to add net production and patient portion to an appointment view.

- Sent eReminders and eConfirmations show in the Communications Log grid of the Edit Appointment window.
- Option to view merged patients in the Select Patient window.
- User is warned if they attempt to make an appointment for a merged patient, and prompted to switch to active patient.

## Billing

- Statements show patnums after the patient's name for an individual and in a column for a superfamily.
- Include patient last name in the rows of a statement.
- Preference to add compounding interest to finance charges in the Finance/Billing Charges window.

## Bridges

- New command line available fields added for custom program links.
- CADI bridge.
- HDX WILL bridge.
- New substitution output text field for [Address2] added for custom bridges.
- For custom bridge output text files, an additional replacement field added for birthdate format yyyy-MM-dd.

## Chart

- Preference to merge procedures notes when multiple users attempt to edit concurrently.
- RCT paint type added for pulpectomy on primary teeth.
- Allow saving XVWeb images from the Chart module.
- XVWeb images show as thumbnails as they are downloaded in the Chart module.
- Referral letters can show tooth chart, including procedures and tooth chart legend.
- When the User column is added to the Chart View, email line items will indicate who was logged on when the email was sent.
- Progress notes update when tooth selections are changed in the tooth chart. 'Show Selected Teeth' must be checked.
- Delete procedures that are attached to a preauthorization.

## Clinics

- Save default dunning and general messages per clinic.
- The billing list can be run for multiple specific clinics.
- Run Global Fee Update for multiple clinics at once.

## Rx / eRx

- New ePrescribing option with DoseSpot. Features two-way medication syncing, proxy clinicians, and provider notifications for prescriptions ready to send.
- Pharmacy information auto populates in the Edit Rx window for electronic prescriptions.
- Add a CDT procedure code to a printed prescription.
- Output text fields for Rx Sheets have been renamed and have new functionality.



- RxNorm codes are now used to standardize medications in the United States and download automatically if they are not imported.

## Family

- Patient merge improvements.
- Prompt to remove future appointments for patients marked "deceased".
- Check for duplicate patients from the Add Family window.
- Referral sources can be designated "preferred".
- Option to view merged patients in the Select Patient window.
- Search for patients by invoice number in the Select Patient window.
- Preference to automatically sync the email address of the guarantor to all family members in the Add Family window.
- Referral letters that contain a procedure grid or tooth chart are saved as PDF.
- Family module preference for 'Insurance plans default to show UCR fee on claims' now sets all plans to use UCR fees instead of just category percentage plans.

## Fees

- Show Hidden checkbox for procedure codes can only be accessed from Lists, Procedure Codes.
- Removed 'Import eCW' button from the Fee Tools window.
- Update write-off estimates independently from fee schedules in the Fee Tools window.

## Insurance

- Access other parts of Practice-Web while the Batch Insurance Payments window is open, when accessed from the Manage module.
- Access other parts of Practice-Web while the Insurance Payment (EOB) window is open, when accessed from the Batch Insurance Payments window.
- Filter outstanding claims in the Insurance Payment (EOB) window by ClaimID.
- Search outstanding claims by full name in the Insurance Payment (EOB) window.
- Preference to allow future dated insurance payments.
- Request benefit information for non-subscribers.
- Detailed progress bar added to Get Reports function in Insurance Claims window.
- Customize the default format of a new Claim ID using Claim Identification Prefix in Account Module Preferences, Insurance tab.
- Insurance Verification time calculation enhancements.
- New Definitions category for Carrier Group Names.
- Associate an insurance carrier with a carrier group.
- New Medicaid COB rule for secondary insurance.
- Customize printed ERAs using Sheets.
- Customize the header that prints on customized ERA sheets.
- Attach supplemental payments (claim reversals and claim corrections) to their claims in the ERA window.
- View write-off and deductible amounts in the ERA window and ERA Claim Details window.
- The Ins Payment Create permission is required to access the ERA window from Manage Module.
- Add tracking status directly to claims on an ERA.

## Payments

- Sort the Outstanding Charges grid on the Payment window by column. Filter by date range, provider, clinic, patient, code, and amount ending.
- Checkbox on the Payment window determines if super family member charges and splits show.
- Merged Force users to attach procedures to adjustments with Enforce Valid Adjustments in Account Module Preferences.
- Allow users to preselect account charges when adding a new payment.
- The "Prefer this patient" checkbox only shows if the family has multiple patients.
- Preference to remove prompt that suggests allocating unearned income when creating a claim.

## Reports

- In the Unearned Income Report, filter out families that have a zero net dollar unearned income balance.
- Birthday Report date range includes year.
- Daily Payments Report preference to show payment splits by provider or not.
- Sort the Treatment Finder report by column heading.
- Non-finalized payments show on the Reports window.
- Two providers with the same first and last name can run Production and Income and Daily Payments reports when one of the providers has the permission to do so.
- New Custom Aging report allows users to choose which transactions to include.
- Exclude archived patients from the Aging of AR report.
- Run the Graphic Reports on a report server.
- The Outstanding Insurance Claims report has its own Display Fields category, allowing report customization.
- New filter options for Outstanding Insurance Claims report.
- Patient date of birth field added to Outstanding Insurance Claims report.
- Deleted providers no longer show on reports.
- Non-finalized Payments Report enhancements.
- The write-off estimates optionally aged in the aging report are now aged by procedure date instead of claimsnapshot date.
- In the Production and Income report, optionally show both procedure date for write-off estimates and insurance pay date for write-off adjustments using the "both" radio button.
- Query Favorites are searchable.
- Production and Income reports and Daily Payments reports have a separate checkbox to include Unearned Income independently of attached provider.
- Four Unearned Income reports show in the Unearned Income reports window.
  - Unearned Allocation report
  - Net Unearned Income report
  - Line Item Unearned Income report
  - Unearned Accounts report

## Security

- Interface changes to the Security window.
  - Security window divided into a Users tab, User Group Tab.

- Global Security Settings are accessible via a Settings menu item on the Security window.
- Users tab shows the user's group and a read-only overview of the group's security permissions.
- Users Group tab shows the group's permissions as well as all users in the group. Use this tab to assign permissions to the group.
- Users can be associated to multiple user groups.
- Logging off of Practice-Web now triggers an OK/No prompt. Set default behavior with a preference.
- Patient Edit permission logs an entry in the audit trail when a patient is moved to a different family, or patient information is changed and saved.
- Fee Schedule Edit permission restricts editing fee schedules from the Setup and Lists menus.
- Referral Edit permission allows/blocks user from editing or deleting referrals. It is tracked in the audit trail.
- Perio Chart Edit permission logs an entry in the audit trail when a perio exam is added, deleted, or copied.
- Procedure Code Edit permission logs changes to individual procedure codes.
- Recall Edit permission logs changes to recalls, recall types, and recall triggers.
- When a task is deleted, an entry is made in the security log that records the tasknum of the deleted task.
- Security Admin permission logs an entry in the audit trail when permissions are granted or revoked for user groups.
- PreAuth Sent Edit permission allows/blocks user from editing pre-auths that have already been sent.
- Filter the audit trail based on the last time an item was edited.
- New audit trail column displays the date and time of the change before last.
- Claim History Edit permission has a user group lock date instead of a global lock date.
- Lock dates are no longer considered when procedures have a status of EO or EC.

### **Miscellaneous**

- Generate a unique serial number for equipment entries.
- Set a tab order for combo boxes on sheets.
- Option to display information entered in old, renamed custom patient fields.
- Access Quick Paste Notes through the Setup menu.
- Single practices can now add specialties to patient clones when creating the clone.
- Preference to send Unhandled Exception report directly to Practice-Web support.
- Apteryx images can be saved to Practice-Web Images module.
- When copying a fee schedule, a message will indicate when the copy is done.
- Enhancements to the Select Patient window.
- Added a option to find payments that are attached to an incorrect payment plan type, paysplits that are attached to insurance payment plans, and claim payments that are attached to patient payment plans.
- Improvements to overallocation warning messages.
- Removed SecurityLogInvalidKeyDBM.
- Display Field window enhancements.

## **Enhancements**

- Use an internal MD5 hash algorithm implementation instead of the .NET framework cryptography implementation.
- Load time improvements in Account module.
- Improved update speed.
- Practice-Web generally uses less memory.
- Speed enhancements to Middle Tier.
- Speed enhancements to processes involving fees.

## Practice-Web Version 17.3

### Major Features

#### ASAP Appointments

- Appointment with a status of scheduled can also be marked ASAP.
- Right click from the appointment schedule to mark an appointment as ASAP.

#### Patient Payments

- Payment window now shows outstanding charges instead of family balances.
- Pay split manager is incorporated into the Payment window, making allocation to procedures easier.
- Payment preferences determine behavior and requirements when entering a payment, such as allocation requirements, auto pay split suggestions, and pay split logic.
- User is prompted for payment amount before entering Payment window.
- Payment window displays the total value of selected outstanding charges.
- Account module preference determines default logic for auto pay split suggestions: adjustments then FIFO, or FIFO only.
- Account module preference for allowing future dated patient payments.
- Easily allocate unearned / unallocated income to procedures using the Payment dropdown, Allocate Unearned,.
- Transfer income using the Payment dropdown, Income Transfer. |

#### User Queries:

- Mark favorite user queries as 'released' vs 'not released'. Released queries can be run by users with less security permissions.
- When running a query favorite, user is prompted to set user variables.
- User Query Admin permission allows/blocks user from writing or editing query favorites, running unreleased queries, adding or removing favorites, and marking favorite queries as released/not released.
- User Query permission changed. Allows/blocks user from running released queries.

### All Features by Category

#### Account

- Patient Payments:
  - Payment window now shows outstanding charges instead of family balances.
  - Pay split manager is incorporated into the Payment window, making allocation to procedures easier.
  - Payment preferences determine behavior and requirements when entering a payment, such as allocation requirements, auto pay split suggestions, and pay split logic.
  - Account module preference determines default logic for auto pay split suggestions: adjustments then FIFO, or FIFO only.
  - Account module preference for Enforce Valid Paysplits determines whether or not Practice-Web automatically suggests pay splits allocated to procedures, and whether or not allocation to procedures is required.
  - Account module preference for allowing future dated patient payments.

- Account module preference for hiding pay splits/outstanding charges on the payment window.
- User is prompted for payment amount before entering Payment window. Credit Card Payments, Cash, Check, EFT, Other payments option to prioritize the patient's oldest outstanding charges instead of the family's when suggesting pay split allocations.
- Payment window displays the total value of selected outstanding charges.
- Option to hide or show pay splits and outstanding charges on the Payment window.
- Easily allocate unearned / unallocated income to procedures.
- Receipt options appear for PayConnect voids and returns.
- Claims
  - Pay Tracking column on Enter Payment window expanded.
  - Account module preference for 'Allow procedure adjustments from claim window.'
  - Minor interface enhancements for Preauthorizations.
  - Allow users the ability to edit a Claim Custom Tracking note.
  - Prompt to allocate unearned income to completed procedures when creating a claim.
- Recurring Charges
  - 'Force Duplicate' option added to the Recurring Charge list. Set up X-Charge (one set of credentials), Setup PayConnect (a single set of credentials), Recurring Charges.
  - Print and email receipts for payments created from the Recurring Charges tool.
- Payment Plans
  - Account module preference determines payment plan logic: AgedCreditsandDebits (Line Item Payment Plans), AgedCreditsOnly, or DoNotAgePaymentPlans (old behavior).
  - Payment plans on statements now show original loan principal, accumulated interest, and amount remaining.
  - Account module preference to hide the Due Now column in the Payment Plan grid when line item payment plans is turned on.
  - Payment Plan preference wording changed from 'Traditional' to 'DoNotAgePaymentPlans'.
- Option to show all activity since the last \$0 balance on statements.
- Proc Fee column added to the Edit Claim and Enter Payment windows.

## Alerts

- Set up alert categories and subscribe users to categories instead of individual alerts.
- New alert types:
  - Generic: General notifications (e.g. Practice-Web Service cannot install properly).
  - Patient Requests Callback: Notifies user about patients who have requested a callback about an eConfirmation.
  - Web Sched New Patient: General notifications about the Web Sched New Patient eService (e.g.
  - Web Sched New Patient Appointment Create: Alerts user about appointments scheduled by new patients via Web Sched New Patient.
  - Numbers Barred from Texting: Notifies user about wireless phone numbers that have rejected text messages.

- Multiple eConnectors: Notifies user that multiple different computers are running an instance of the eConnector.

### ASAP Appointments

- Appointment with a status of scheduled can also be marked ASAP.
- Right click from the appointment schedule to mark an appointment as ASAP.

### Appointments

- Insurance Color added as an Appointment View field.
- Insurance Color added as an Appointment Bubble Display field.
- Customize the background color of an insurance carrier in appointments on the schedule.
- Abbreviation and Layman's Terms added as an available field for AppointmentEdit Display Fields.
- When LateColor is added to an appointment view, it will no longer override the color of completed appointments.
- An appointment can have a status of scheduled and be marked for the ASAP list.
- Right click from the appointment schedule to mark an appointment as ASAP.
- If the provider on the appointment does not match at least one provider on an attached procedure when setting the appointment complete, user will receive a prompt.

### Clinics

- Specify clinic-specific recall messages.
- Update fees for specific clinics.
- Tool to reassign patients in a hidden clinic to a different clinic.
- Clinics can have multiple specialties.
- When clicking Clinics in the main menu, when there are more than 30 clinics, there is no longer an option to show hidden clinics.

### Discount Plans

- Tool to merge two discount plans.
- Mark discount plans as hidden.

### Security

- Ortho Chart Edit (full) permission allows/blocks user from creating, signing, or editing any ortho chart.
- Ortho Chart Edit (same user, signed) permission allows/blocks user from editing and signing ortho charts created or signed by others.
- Procedure Note (full) permission allows/blocks user from editing and signing procedure notes.
- Procedure Note (same user) permission allows/blocks user from editing procedure notes signed by others.
- Group Note Edit (other users, signed) permission allows/blocks user from editing signed group notes.

- Separate audit trail log for tracking changes to insurance plans and their attached carriers, employers and benefits.
- Pay Plan Edit permission allows/blocks user from creating, editing, closing ,and deleting payment plans.
- Claim Edit permission logs an entry in the audit trail when a claim is created, cancelled, or saved.
- User Query Admin permission allows/blocks user from writing or editing query favorites, running unreleased queries, adding or removing favorites, and marking favorite queries as released/not released.
- User Query permission changed. Allows/blocks user from running released queries.
- Claim History Edit permission allows/blocks user from editing the claim status history.
- Option to force user to reset their password when they first log in.
- Replication Setup permission allows/blocks user from accessing replication setup.
- Wiki Admin permission allows users to lock Wiki pages. Only users with this permission can edit a locked page.
- Changing an Enforce Valid Pay Splits option adds a log to the audit trail.

### Standard Reports

- New Patient Portion Uncollected report lists procedures that still have an uncollected balance.
- New Unfinalized Insurance Payments report lists claims that are received, but not finalized.
- Option to make the amounts in the Treatment Finder report match the amounts in the Treatment Plan module.
- Claims not Sent report is interactive.
- FQHC Sealant report moved to Public Health category.
- Option to include/exclude appointment notes in the Appointments Report.
- Logic for D9987 added to the Broken Appointments Report.
- New Insurance Aging report.
- Open Standard Reports Setup area via the main menu, Setup, Reports.
- Referral Analysis Report option to print as landscape.
- Option to use both procedure date and ins pay date to show insurance writeoffs in Production and Income reports.
- Payment Plan report now includes columns for accumulated interest (Accum Int), Balance, and Balance Not Due.
- Generate Query button added to the Aging of Accounts Receivable report.

### Tasks

- Block task popups by task list.
- Right click on a task to set its priority.
- Task search enhancements.
- Auto note button added to the Task Note Edit window.
- Tasks refresh if they are edited by another user while open.

### Treatment Plans

- Active and Inactive treatment plans won't reflect the patient's current insurance type.



- When checking for frequency limitations, tooth number, surface, and tooth range are considered.
- Option for users to a classic view version of the treatment plan for patients who have a treatment plan that was saved prior to version 17.1.

#### User Queries:

- Mark favorite user queries as 'released' vs 'not released'. Released queries can be run by users with less security permissions.
- When running a query favorite, user is prompted to set user variables.
- User Query Admin permission allows/blocks user from writing or editing query favorites, running unreleased queries, adding or removing favorites, and marking favorite queries as released/not released.
- User Query permission changed. Allows/blocks user from running released queries.

#### Miscellaneous

- Option to use the clinic selected in the main menu instead of the patient's clinic when creating an electronic prescription.
- Control the perio chart by voice (English speakers and Universal tooth numbering only).
- Claim Snapshots are captured when the claim is created, unless another trigger has been set in a previous version.
- 'Skip for now' option added for Auto Note prompts. If edited later, the prompt will reappear.
- 'Skip Altogether' option in an Auto Note prompt skips the prompt completely and blanks it out. If edited later, the prompt will not reappear.
- Clear button added to the Commlog window.
- Reply all and Forward added to the Email Inbox.
- Progress bar on Practice-Web splash screen when launching the program.
- Progress window changed for billing and global fee updates.
- Right click on a cell in a grid to copy text to the clipboard.
- Send a copied sheet to the Kiosk for review.
- Added Acteon bridge.
- Ortho through Age box added to the Benefit window. Works the same as Fluoride through Age but with codes D8070, D8080, and D8090.
- Add a pick list to a wiki list.
- When setting up time card rules, mark an employee as 'overtime exempt'.
- Access Time Card Setup from the Time Card Manage window.
- Lock option for static text fields.
- On Program Links window, enabled bridges are highlighted green and marked with an X.

## Practice-Web Version 17.2

### Major Changes

#### Reports:

- Restrict user access to specific reports.
- Report setup divided into four tabs:
- Run the Production and Income Reports on a report server.
- Option to re-run aging for all selected months in current A/R graphic reports.

**Substitution Codes:** Control which procedures codes are downgraded by insurance plan.

#### Task Reminders

- Reminder tasks pop up when they are due.
- Change any task to a reminder task type, and vice versa.
- New option to set a one-time task reminder.

**Setup Wizard:** Run a setup wizard to help enter basic setup information.

### Changes by Category

#### Account

- Filter recurring charges by date.
- Option to consider write-off estimates in aging.
- Force Duplication for PayConnect is available when using and EMV terminal.
- Ability to electronically sign PayConnect transactions when using an EMV terminal.
- When adding an adjustment attached to a procedure, if the remaining balance is less than 0, user will receive warning message.
- For prepayments, view date and amount of allocations via the Payment window.
- Date column label changed to Proc Date in Payment window, Payment Splits grid.
- (procedure date) field removed from Pay Split window.
- When attaching a procedure to a pay split, the Select Procedure window shows more details.
- Account module preferences organized into three tabs.
- Preference for 'Invoices payments grid show write-offs' determines if insurance write-offs are included in the Payments grid on invoices.
- Preference for 'Patient Payments allow future dated debits' determines if users can enter future-dated payments.
- Preference for 'Patient Payments Use' determines which clinic is assigned by default to patient payments.
- If patient is assigned a billing type that has been 'hidden', (hidden) will show next to the billing type.
- Code Range and date filters added to Planned Appointment Tracker.

#### Appointments

- Preference to set a time, in seconds, to delay a click when loading the Edit Appointment window. Useful to prevent accidental clicks.

- User option to only view data for the current exam in the Perio Chart vs entire history.
- In the Unscheduled List, Status column renamed UnschedStatus and new AptStatus column.
- New options for broken appointments. Includes logic for cancelled appointments (D9987).
- Date range filter added to the Unscheduled List.

## Claims

- On Insurance Claims window, History grid, added a user column and right click options. ClaimPrinted added as a status and filter option.
- Enhancements to Claim Forms window.
- Printed ADA 2012 claim form uses Patient Number for box 23 (PatientID) instead of SSN.
- Enter Quick Paste Notes when recording claim status history.
- On Denti-Cal claim form, print up to 15 procedures (instead of 10).
- When creating a preauthorization for a patient with only one active plan, user is no longer prompted to select insurance or relationship to patient.
- For Canada, when an EOB claim response is created, insurance paid amounts can be automatically entered. For Preauthorizations, the amount paid is entered as an estimate.
- Clearinghouse passwords are masked.
- Option to block saving 837 files to the claim export path when sending to claims to EDS.
- When matching ERA 835s to claims, the claim identifiers are no longer required to match.
- Right click on a claim in the ERA window to go to the account.
- When finalizing a ERA claim, manually detached claims are not considered.
- Print button added to Claim Explanation of Benefits window.

## Clinics

- Filter auto-ortho claims by clinic.
- Reorder operatories for specific clinics.
- Filter the Global Fee Update tool by clinic and view progress with a progress bar.
- Option to display clinic abbreviation instead of the clinic description in the main title bar.
- Associate a speciality to a clinic. Useful for Patient Clones.

## Insurance

- Set a default billing type for an insurance plan.
- Preference to automatically change a patient's billing type when a new primary insurance plan is created and a billing type is set.
- Edit Insurance Payment window, "Prepaid Insurance Cards" changed to "Virtual Credit Cards".
- Carrier Group Name field added to group insurance carrier for query purposes.
- Carrier2Address and Carrier2CityStZip added as static text fields.
- Control which procedures codes are downgraded by insurance plan.

## Interface Changes

- Report setup options divided into four tabs:
- Updated labels on blockout Cut-Copy-Paste tool to reflect accurate behavior.
- Message that displays when hiding a provider has been enhanced.

## Patient Clone

- Create multiple patient clones per patient.
- Use specialties to differentiate patient clones. Clinics
- Option to place new patient clones in a new family and link to original patient via super family.
- Patient clone relationship information removed from Edit Patient Information, Other tab.
- Patient clone tool buttons added to Family tool bar when Patient Clone is turned on (Add, Synch, Break).
- When a patient has a patient clone, a new Patient Clones grid shows in the Family module.

## Reports

- Restrict user access to specific reports.
- Run the Production and Income Reports on a report server.
- Aging of A/R Report updated to complex report system.
- Report setup divided into four tabs:
- Sort the Appointments Report by date created or date scheduled.

## Security

- Edit Popup (other users) permission allows/blocks user from editing or deleting popups created by other users.
- InsuranceCarrierCombine permission allows/blocks a user from combining insurance carriers.
- InsurancePlanCombine permission allows/blocks a user from combining insurance plans.
- 'Change existing Ins Plan using Pick from List' permission allows user to pick a new plan before dropping a plan.
- Audit trail entry added for Create Adjustment For Discount Plan permission.
- Set up automatic Practice-Web log in when logged in to a Windows domain user.
- When changing the user on a Task, user is prompted to enter their password.
- Run the Appointment Report by appointment date or date created.

## Tasks

- Reminder tasks pop up when they are due.
- Change any task to a task reminder and vice versa.
- New option to set a one-time task reminder.

## Miscellaneous

- Images module defaults to using Internet Explorer's default PDF reader to open PDF images.
- Allow backdating and deleting of specific procedures (with a \$0 fee) by bypassing global lock date.
- Right click option to block incoming text messages from specific mobile numbers.
- Set specific sheets (e.g. Exam Sheets) to bypass the Global Lock Date.
- DBM to fix invalid dates for all date columns.
- DateTStamp column added to the LabCase table.
- OrthoCad bridge.
- Static text fields dateLastBW, dateLastExam, dateLastPanoFMX, dateLastPerio, and dateLastProphy are based on the first five characters of the procedure code.
- Ability to cancel out of an auto note, save responses and unanswered prompts, then return at a later time to complete it.
- Column headers in wiki lists wrap.
- Lab Fee field added to Edit Lab Case window.
- Key range columns and 'enable random primary keys' removed from Replication Setup window. Only will show when random primary keys are already enabled.
- Option to add a default procedure note for treatment planned procedures.
- On Fill Sheet window, separate buttons for Print and Email.
- All treatment plan calculations are saved with a treatment plan, regardless of the 'show' options selected at time of save.
- Commlog button and fields for email address, SS#, Patient Status, and Billing Type added to the Add Family window.
- Saved treatment plans will retain the insurance estimate information of the plan at the time of the save, even if it is later dropped and a discount plan is added instead.
- Warning message displays when changing the name of a custom patient field.
- When there is a version mismatch in a 'restored' database, Practice-Web must be restarted and updated before opening the restored database.
- Unhandled Exception window has new Copy All, Print, and Quit buttons. Users can only quit Practice-Web when a UE (Unhandled Exceptions) appears.
- Fix for missing ebill rows.
- Progress bar shows when closes.
- New tool to clear an update in progress.