Practice-Web Version 21.1

Major Changes

Discount Plans: Have more control over discount plan setup.

- Allow for plan notes and subscriber notes.
- Create and add frequency limitations.
- Allow an annual max.
- Discount Plans are automatically assigned a Plan ID Number.
- Discount plan amount now considers the unit quantity.

Treatment Plan: Taxable procedures can display tax amount.

Changes by Category

Account Module

- When using Blue Book, default the cursor into the Allowed column when entering claim payments.
- Account Module always displays Quick Procs, even if user does not have *Account Procs Quick Add* permission.
- Allow associating treatment planned procedures with dynamic payment plans.
- Payment Plan Tx Credits include Discount Plan adjustments in *Rem Before* amounts.
- Block moving credit cards with recurring charges between patients.
- Deleting a credit card now checks for duplicate tokens.
- Payment type is now required before voiding a transaction.
- Dynamic Payment Plan interest calculation now only considers the principal for completed procedures when *Await procedure completion* is selected.

Chart Module

- Paging is disabled when progress notes are sorted by a column.
- Re-order procedures on a procedure button.
- Patient information in Practice-Web updates in DoseSpot.
- Patient last name displays on superfamily commlogs in the Chart Module when the patient first name field is blank.

Family Module

- Added a date picker dropdown to the Birthdate text box in the Edit Patient Information window.
- Merged patients are removed from superfamilies if they were placed in one.

Imaging Module

- Item Info window now displays after importing files and using the Paste button.
- Patient selection is cleared when switching users while in the Imaging Module.

Manage Module

- Add new employers when importing insurance plans.
- On Hand Quantity added to Supply and Inventory.
- TSI users can print or export the Account Receivable Manager grid.
- Updated terminology in TSI Setup window and Account Receivable Manager.

- Clinic button added to the TSI A/R Manager.
- Right-click options to quickly access patients and tasks.
- Ability to have multiple task lists open at once.
- Added tasknum to task window.
- Enhancements to emails automatically downloaded to the email inbox from Gmail.
- 'Email Inbox' updated to 'Email Client' and now includes a sent messages filter.
- Remove Old Data tool includes the *EmailMessage* table.

Reports

- Custom Aging Report displays when a provider is marked as hidden.
- Optimized the payment plans report.
- Procedures with deleted procedure notes are now included on the Incomplete Procedure Notes Report when *Include procedures with no notes* is checked.

Security

- Audit trail tracks when patient status is changed.
- Ability to filter the user list when logging into Practice-Web.
- Security log added when a patient's Text OK status is changed.

Treatment Plan Module

- Use custom sheets per clinic for Treatment Plans.
- Allow users without the *Insurance Payment Create* security permission to enter insurance payment estimates on preauthorizations.

Miscellaneous

- Button for None added to definitions picker window.
- Diagnostics window shows count of hidden clinics.
- Database maintenance method for PatientMissing moved to the Tools tab.
- Database maintenance method to un-delete procedures associated with income.
- Database maintenance methods automatically moved to Old tab when they do not need to be run again.
- Procedures on appointment transfer to patient and referral letters.
- When a shutdown signal is received, users will be automatically closed out of Practice-Web without warning.
- Added user preference to the *Ignore Content* checkbox for wiki search.
- Appointment Module net production includes TP procedure discounts when the *Add daily adjustments to net production* preference is checked.
- Procedure Code Tools now fix D code abbreviations.
- Emails created from the Fill Sheet window now default the From field to the logged-on user's email address.
- Insurance Plan List filters updated.
- EDS electronic statements are now batched into a single file.
- Field to use either the patient's preferred name or patient's first name.
- Code System Import is accessible regardless of if EHR is turned on.
- Security Admin permission required to add IP Address to Cloud Management.

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 operatory.
- 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.

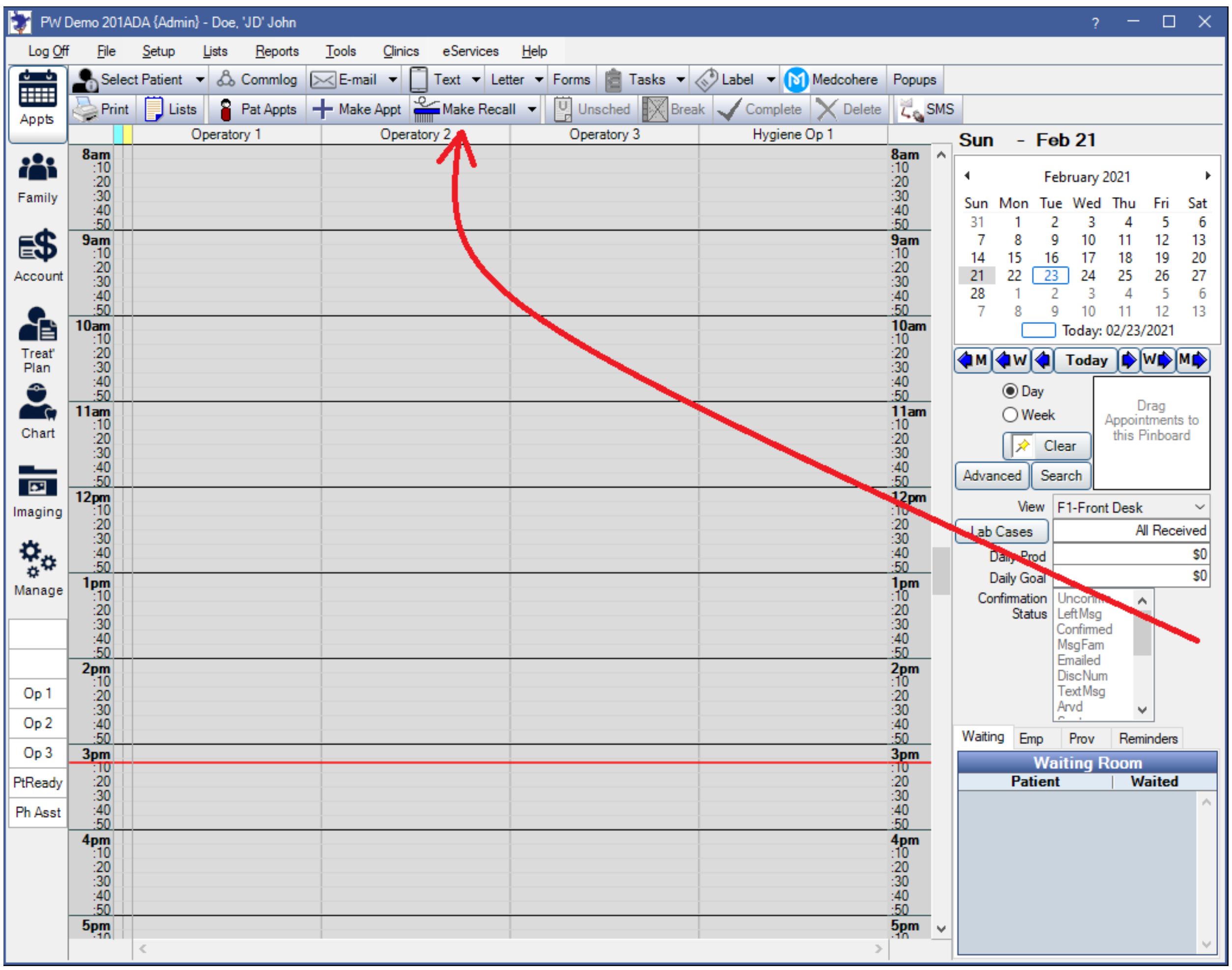
Updated Blue Book Feature: The improved Blue Book feature makes estimates easier than ever for your out-of-network insurance plans.

- 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 operatory.
- 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 operatory.
- 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 Micorsoft.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 blockout types are added on top of an existing standard blockout type, the standard blockout 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'a 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.