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Version: 20.03.01

- 03/05/2020 Reports>Patient Reports> Recall and Contact Module: added Restrict by Alphabetical Order.
- 03/05/2020 Main Screen> Billing Party Ledger, added option to Exclude Late Fees in Display.
- 03/05/2020 Reports>Master List Reports> Referring Doctor List, option added to export list to excel.
- 03/05/2020 Billing>Statements> View Statements to be printed, added the color yellow on patients names that do not have an email address.
- 03/05/2020 Reports>Pt reports>Recall & Contact, option added to select Mobile Service Carrier.
- 03/05/2020 Reports>Charges Income, Report: By Date of Service, added option to exclude adjustments.
- 03/05/2020 General Setting>Charge Defaults> Added option to (Warn on save if Diagnosis is left blank)
- 03/05/2020 Audit trail added tab to view archived data.
- 03/19/2020 Master List>Allergies & Med>Added option to set priority for the condition from 1 is highest 9 lowest. If priority is set for an alert it will update all pts using that alert with that number.
- 03/05/2020 Report>Income Report Added option to Exclude Insurance type code from the Income report.
- 03/05/2020 Encounter Form> Added Cell number to the Encounter form.
- 03/05/2020 Security clearance option added: Allow Viewing Billing Party Ledger, Allow Viewing Patient Ledger. If not checked user will not have access to view Ledgers.
- 03/05/2020 Instant Messenger Pop up option added. File>General Settings>Admin>General Options>Place a check mark in Instant Message pop up on new message.

Version: 19.04.01

- 04/11/2019 Reports>Financial Reports>MTD-YTD>Report/Export outputs Place of Treatment.
- 04/11/2019 Reports>Patient Reports>Patients Listing By...Reports>Sort/Filter by Account number now outputs patients email address to excel export (Only)
- 04/11/2019 Billing>Delinquent Module> Provider or Practice name outputs on the Printed List Report and Export.
- 04/11/2019 Reports>Payments by Procedure, removed transfers and credit transfers from report.

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- 04/11/2019 Easyview:Prescriptions: Added a field to select Diagnosis code, this will output on the prescription.
- 04/11/2019 New scheduler (only) Reports: Current Day Appointment> Added option to skip hidden columns from the report.
- 04/22/2019 Pt Statement>Added option Yellow Shading on Portions of Statements. In Statement criteria, bottom right place a check mark in Yellow Shading.
- 04/22/2019 Statement Yellow Shading opt for Office name/address at the bottom of the statement: In provider info, customization tab, Customized Footer: highlight the text in yellow.

Version: 18.08.01

- * 08/03/2018 Added new tab (MMJ) in pt's demo for Medical Marijuana Info. Go to General Settings>Admin>Pt Default>place check mark in (Show Medical MJ Tab in Pt's demo)
- 07/19/2018 Billing party ledger report, added a column for Adjustment Category (Adj Cat).
- 07/19/2018 Added option to show patient balance when using CheckIn Module. In General Settings> Administration>Patients Defaults>place check mark in Show Bal due on checkin
- 07/19/2018 In Dashboard view, small button to the right of Appt List button will display the appt list details including the (Reason) which is the note entered in the appointment form.
- 07/19/2018 Dilenquent module report outputs to excel: Pt name, pt. balance, SSN#, DOB, street 1, street 2 City, state zip, cell phone, home phone & account#
- 07/19/2018 New Scheduler: Waiting List Tab, added a Search button to search for patient's in the waiting List.
- 07/19/2018 Procedure Frequency Report added percentage option to criteria. Report must be run by (Type of Report) DETAIL in order to get percentages to output.
- 07/19/2018 Statement Criteria, added an option to select (Pay to Address for return address) which can be setup in the provider Defaults.
- 07/19/2018 Main program, Search field: When searching for a patient it will find patient's name even if they have been set to inactive.
- 07/19/2018 New Scheduler, reports Current Day Appointments, Appointment Day Sheet outputs patient's nickname.

Version: 17.05.01

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- * 05/09/2017 Electronic Ansii file Only>Added an option in insurance company for loop 2400 Segment SV to output only 4 DX pointer codes if required by specific insurance company.
- * 05/09/2017 New Scheduler Only>Waiting list has been added to the appointment form, this will allow you delete the patient from the waiting list while creating the new appointment.
- 05/09/2017 Financial Reports>Adjustment Report>This report now sub-totals by adjustment type order.
- 05/09/2017 Reports>Patient Reports>Patient List Report>When report exports to excel it now includes patient address.
- 05/09/2017 Encounter Form>Is now set to print the Preferred Contact number that has be checked in patients demographics.
- 05/09/2017 Encounter Form>When printing a single encounter form, if batch is setup not to print SS# the single encounter form will print the same way.
- 05/09/2017 Encounter form>Single Encounter form is set to follow what criteria is set in batch Encounter forms, for DX codes and Procedure Codes.
- 05/09/2017 Reports>Financial Reports>Assistant Charge Report & Assistant Income Report have an option to export to excel.
- 05/09/2017 Delinquent Module> Exclude/Adjust Specific patients tab. When you select the adjustment type it now shows that adjustment type at the visit level.
- 05/09/2017 Reports>Financial Reports>Receivable Report: Currently Responsible Detail also Summary Report, option added in criteria Group by: Date or Responsible.
- 05/09/2017 Activity At Glance>When sending statements out it will show the pt due amount.
- 05/09/2017 General Settings Master List>Insurance companies added a Send To option so that you can send this report to file, PDF, HTML and CSV.

Version: 16.09.01

- * 09/20/2016 Reports>Patient Reports>Patient listing by...Report>Added a No Email report in Sort/Filter Report by. This will show all patients who do not have an email setup in patients demo.
- * 09/20/2016 Billing>Delinquents>added the ability to print and export the report results in the tab area Exclude/Adjust Specific Patients
- * 09/20/2016 Billing>Delinquents>Exclude/Adjusted Specific Patients tab: added option to Show Only Pts Bal. below Threshold, which pulls from criteria entered in Advanced Search Options.

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- * 09/20/2016 Reports>Patient Reports>Patient Status Report, added a column that will show patients previous status.
- * 09/20/2016 Reports>Patient Reports>Patient Listing by...Reports> Added Text Phone in sort/filter list. This will show pts Name, Text number, Text Carrier and status.
- 09/20/2016 Today>Create Charges From Appts>Added column for patient appt status. ie No Show
- 09/20/2016 Billing>Delinquents>Exclude/Adjust Specific Patients results in this window have been set in alpha order by patient names.
- 09/20/2016 Patient Demographics, added a blank line in the Text Carrier list.
- 09/20/2016 Billing Party Ledger, added a date range option.

Version: 16.02.01

- * 02/09/2016 Added option to do a mass adjustment for patients in Delinquent Module. Go to Billing>Delinquents> Click on Exclude/Adjust tab at the bottom select adjustment type.
- * 02/10/2016 Batch Post Multi check, added a message asking if you wish to transfer the credit to Pt? when you post the check. You will get this message on any visit that has a zero ins bal.
- * 02/10/2016 Added new feature Electronic Prescriptions, contact support 877-767-7007 to go over cost and setup for this option.
- * 02/09/2016 Added export option to the Collection Module. Go to Billing>Collections>Print Collection Report>At print preview of the report select Export.
- 02/09/2016 Billing>Post Multi-Patient insurance checks>Create your batch, when visit is added to the Add Payments EOB, patient's Fee Schedule will show on the top right corner of window.
- 02/09/2016 Option added in Timeclock. Go to Administration>Preferences: Added option to Warn/Stop employee from clocking out late.
- 02/09/2016 In Utilities>Data Tools>Subdirectory Wizard added options to copy User Access Settings into new directory.
- 02/09/2016 Added a column to show credits in the Delinquent Module. Go To Billing>Delinquents, there is a new column called Inc Credit.
- 02/09/2016 Billing Party Ledger, added option to print office logo.
- 02/09/2016 Added option to select Payment Type in the Billing>Post Multi-Patient insurance checks, batch post insurance checks screen.

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Version: 15.09.01

- * 09/16/2015 PUTIL option to import ICD10 codes. Go to File, Utilities, Data Tools, Import ICD10, Click browse button, select icd10cm_2015_tab.txt. Codes must be purchased by user.
- * 09/16/2015 In the Main Program, Today, Create Charges from Appointments: added option to only create charges with procedure codes attached.
- * 09/16/2015 Added the ability for users to add their own carriers. Go to File, General Settings-SMS Carriers: Click insert, add carrier and domain string (i.e. @messaging.sprintpcs.com)
- 09/16/2015 On Visit, Payments Procedure Extras: Allowed for more characters to print on Walk out Receipt and Statement.
- 09/16/2015 New Scheduler (Only) Patient Flow view, right click in screen All Patients being seen today, option added to the drop down list to insert patient appointments.
- 09/16/2015 Reports, Patient Listing By : Sort/Filter by Account Number, when you export report shows same headers as paper report.
- 09/16/2015 Reports, Aging Report added option to include Balances not yet due (Payment Plans, COT, etc)
- 09/16/2015 In Main Program, Billing: Delinquents now excludes Pre-estimate treatment visits from list and report.
- 09/16/2015 Reports: Financial Reports: Payments By Type. Report heading now shows if it was run by Date Entered or by Date of Payment.
- 09/16/2015 Reports, Patients Listing By : Sort/Filter by No Insurance Company. Added patients phone numbers to paper report and ability to export the report.
- 09/16/2015 Batch Print Encounter forms: added option (For Next Appt only include appts on or after this date). encounter form type must be set to (built in) only.

Version: 15.02.01

- 02/24/2015 General Settings, Administration, Patient Defaults: Added default Martial Status.
- 02/24/2015 Scheduler (New): Added a patient flow report. Go to reports, Admin, Patient Flow Stats. The report shows the pts name, time, date of appt and how long the duration.
- 02/24/2015 Encounter Form, (Built in) added patient's email address.
- 02/24/2015 Billing>Post Multi-Pt Ins check: Added option to select cc for payment type.
- 02/24/2015 Encounter form, (Built in): will display patient's next appointment.

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- 02/24/2015 Scheduler (New): The yellow area (Selected Pt Information) in Daily Resource View of the scheduler, displays a patient's next appointment.
- 02/24/2015 Easyview: When creating a prescription for patient Medical Alerts will appear on the right side of the window for viewing purposes only.

Version: 14.10.01

- 10/01/2014 Reports>Aging report (Export Only). Export outputs patients insurance policy numbers and date of birth.
- 10/01/2014 Issue resolved reversing payments at the bottom of a visit. You can now reverse more than one payment for that visit.
- 10/01/2014 Visit Screen>Added an option in General Settings>Administration>Charge Defaults>Start new visit at, select where you want cursor to default when you insert visit.
- 10/01/2014 Added a default telephone area code>General Setting>Administration>Patient Defaults.
- 10/01/2014 Added option to turn off recall warning when adding appts. Option is located in General Settings>Administration>Scheduler defaults.
- 10/01/2014 Main Screen, scroll bar to the left of patients was not moving with patient names. This issue has been resolved.
- 10/01/2014 Walkout Receipt>Added option to remove Dx codes and lettering on receipt. General Settings>Administration>Billing Statement and Receipts default.
- 10/01/2014 Visit screen, added an option for Previous credit, you can select oldest visit to pull credit from or select all.
- 10/01/2014 Scheduler (New) Patient Flow view: All Patients being seen today, added a column called Final Time in Chair. This shows the length of time Patient is in Treatment Area.
- 10/01/2014 Changing patients ins comp in demo with new fee schedule. When you go to an existing visit and click change ins, you get Change fee sched to match payor.
- 10/01/2014 Pre-Post Report shows totals at the end of the report, this report is located in Batch Post Multi Patient Insurance Check.

Version: 14.06.01

- 06/02/2014 Top portion of Walkout receipt shows Diagnosis Codes and Description
- 06/02/2014 Reports, Patient Alerts and Conditions, option added to select a specific alert or ALL.

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- 06/06/2014 Scheduler (New) in the Daily Resource View. Added column Description in Patient Flow window to show reason for patient coming in.
- 06/02/2014 New Scheduler, when you select No Show for a patient status, there will be an X next to the patient's name in the Daily Resource View.
- 06/02/2014 Patient Audit Trail shows document emailed to patient.
- 06/02/2014 Reports, Procedure Frequency Report. When you select a specific place of service prior to running the report, the place of service name will display in the heading.

Version: 14.04.01

- 04/02/2014 Added a visit column to patient ledger (in the export only)

Version: 14.03.01

- 03/03/2014 Option has been added to PROHIBIT viewing of charges screen in the main program. This can be found in General Settings>Securities when setting up security for users.
- 03/03/2014 Revised CMS 02-12 changes.
- 03/03/2014 Added the word OTHER in work status in the insured employment field.
- 03/03/2014 Date of Service Default option added in General Settings, Administration>Charges. You can select visit date or computer clock date.
- 03/03/2014 Added ability to email from pictures and scans. In scans click on document management, find file to send, right click a list of email options will display.

Version: 13.11.01

- * 11/22/2013 Added ability to export scheduler data to Google calendar or Outlook. In (New) Scheduler, select File>Utilities>Export. Please watch video for further instructions.
- 11/22/2013 Recall Module>added option to Tag Emails. This is located under More Options.
- 11/22/2013 Option added (Don't Print SS number) on Encounter form.
- 11/22/2013 New Token added (Encounter Number) this works with Pre-printed encounter form. Form will show wording Ticket and the encounter number pulling from next encounter number.
- 11/22/2013 Main screen of program: Search tab added option to search by patient email.

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- 11/22/2013 Reports>Aging Report>run aging report by grand-total only. To select this feature, click on Summary then you can enter the check mark in Grand-total Only.
- 11/22/2013 Reports>Charges Only (new format)>Added option to Subtotal by Modifier, you can select one or leave blank for All modifiers.
- 11/22/2013 Easyview>Patient Info Sheet>Added to print on Patient Info sheet> Carrier type. Employer address, Phone, Primary/secondary responsible party SSN#
- 12/24/2013 Charges, could we have the charge report show dx codes for patients visits in the export, to be used for PQRS reporting

Version: 13.06.01

- * 06/25/2013 Electronic signature on prescriptions added. To setup go to General Settings>Providers>Customization Tab>Optional RX signature file.
- 06/25/2013 Added option to Exclude if Patient Made Payment in Last 30 Days in Delinquents. Go to Billing>Delinquents>Advanced Search Options.
- 06/25/2013 When patients are marked in-active at the patient demographics level, there name will no longer appear when selecting patients name in the scheduler.

Version: 13.03.01

- * 03/27/2013 Treatment Plan>Added additional treatment footer field within the treatment plan. You can customize treatment plan footer per patient.
- * 03/22/2013 Added new report>Reports>Financial Reports>under Summary and Statistical>Procedure Analysis by Payer can be exported.
- 03/22/2013 You can now add up to 14 procedures when creating a procedure group. General Settings>Procedure Groups.
- 03/22/2013 Option added Do not print "No Future Appt Scheduled" on walkout receipt. General Settings>Administration>Billing/Statements/Receipts, place check mark do not print.
- 03/22/2013 Reports>Financial Reports>Added option to run Claims not Submitted report by Primary, Secondary and Tertiary.
- 03/22/2013 Added sound to Instant Messenger when messages are sent. Go to File>Instant Messenger Program.
- 03/22/2013 Scheduler (New) An indicator will display on the left of the patient appointment if anything has been entered in the Supplemental Note field of the appointment form.
- 03/22/2013 Scheduler (New) Added option to print note from appointment form in Reports>Appointment Status

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- 03/22/2013 Added option to tag more than one patient status in Referring Provider Frequency report.>Reports>Financial Reports>Referring Provider Freq.
- 03/22/2013 Added export option to Paid Off Payment Plans. Go to Reports>Financial Reports>Paid Off Payment Plans.

Version: 13.01.01

- * 01/21/2013 Added new report. Reports>Financial Reports>Paid Off Payment Plans.
- * 01/21/2013 Scheduler (New) Added option in appointment form to post patient co-pay. The charges can be pulled into the visits on main screen. Go to Today>Create charges from appts.
- 01/21/2013 Added percentages to Patients by Referring. Reports>Administrative>Patient by Referring
- 01/21/2013 Monthly Summary Dashboard report retains the procedure codes entered when you first run it.
- 01/21/2013 Pictures and Scans, when in images if you highlight a thumbnail option added to select Default Viewer.
- 01/21/2013 Scheduler (New) If patient is setup with Manage Care, you will receive a Warning when creating an appointment it will show remaining manage care visits.
- 01/21/2013 Added warning if same diagnosis code is used twice when entering a patient's visit.
- 01/21/2013 Added Global date to the Encounter Form. If Global date is set, this will appear to the right of the patients balance on the form.
- 01/21/2013 Scheduler (New) Select Resources to view, choose which columns will print in Reports>Current Day Appts>Displayed Resources (detailed)
- 01/21/2013 Batchpost large insurance checks: Warning added when entering a duplicate check manually or during autopost.

Version: 12.11.01

- * 11/06/2012 Scheduler (New) if appointment is rescheduled the appointment form shows previous appt. Option added in Scheduler Settings: Do not add appt history to note.
- * 11/06/2012 Added option to pull in charges from the scheduler in batch. Go to Today>Create Charges from Appts.
- 11/06/2012 Start and End dates for Graph Reports default to the current date.

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Version: 12.10.01

- * 10/12/2012 Delinquent>Patient List Report exports with patients demographics. Added Change patient status under tab Exclude Specific Patients.
- * 10/12/2012 Statements>Added option to run statements based on alphabetical order.
- * 10/12/2012 Added Security Option>Allow deleting of Images. If securities are set, after update install go to your Security settings and place a check mark in Allow deleting of Images for users.
- * 10/12/2012 Recall and Contact Module>Added option to select Day of Month when running this report by Birth Month. Go to Reports>Patient Reports
- 10/12/2012 Recall and Contact Module>Added option to select a specific resource column from the Scheduler.
- 10/12/2012 Delinquent Report>Added option to search by Place of Treatment and added POT to patient list report.
- 10/12/2012 Timeclock>added warning option if employees attempts to clock in early. Go to Time Clock>Administration.
- 10/05/2012 When we pull up treatment notes in easyview all we see is the Assessment part of the note. Could we see all of it, subjective, objective and plan without having to open the note.

- 10/12/2012 Scheduler (New)>Right click on patient to post co-pay. If visit exist it will post patients co-pay to that visit, if there is no visit it will create one and post the patient payment.
- 10/12/2012 Scheduler (New)>Reports>Current day Appointments>All Resources Detailed>added an (*) in front of patient's name to indicate a medical alert.

Version: 12.09.01

- * 09/18/2012 Added option to add modifiers and Dx codes in the appt form (New Scheduler Only) At the visit level select From Appt and charge info will populate with info from the appt.
- 09/18/2012 Added work extension to the billing party screen.
- 09/18/2012 Added option to make a provider inactive. Go to General Settings>Providers. Providers name will not appear in drop down list of the scheduler.

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- 09/18/2012 Added the ability to archive Audit Trail>Go to File>Utilities>Data Tools>View & Archive Data>Select tab (Audit Trail). Short date span recommended archiving can take hours.
- 09/18/2012 Patient Alerts and Medical Condition added option to print report for individual patients.
- 09/18/2012 Added Dr's name and address to print on Payment Plan Ledger.
- 09/18/2012 Patient Recall and Contact Module added option Birth Month to search criteria.
- 09/18/2012 Go to Billing>Delinquents select criteria and print list. Added letterhead to list report.
- 09/18/2012 Time Clock Administrator reports, added the option to save reports to pdf.
- 09/18/2012 Dilinquent Report pulls from the first transfer date.
- 09/18/2012 Dashboard View>Photos and Scan button will indicate if the patient has photos/documents.
- 09/18/2012 Added Photos & Scans button on Main screen for easy access to photos, also indicates if the patient has any photos/documents.
- 09/18/2012 Adjustment Report added Adjustment Type to search criteria.
- 09/18/2012 Added option to copy Provider's info from another provider in the masterlist. This will only brings over Practice name, address and phone number.

Version: 12.08.01

- * 08/14/2012 Added a button when posting insurance payment in batch and visit level (View Historical Payment Data) to show payment history of the procedures for that visit. Also some reports
- * 08/14/2012 Option added to text patient from the (New) scheduler. Right click on patient select text. Format email but will send text message. Add /change the text message before you send.
- 08/14/2012 Added export to User Defined Fields report. Go to Reports>Patient Reports>Patient By User Defined Fields.
- 08/14/2012 Aging Report sort report by data (current responsible) now outputs insurance company name and insurance code.
- 08/14/2012 Reports> added Patient with no insurance. Click on Reports>Patient Reports>Patient Listing By...Report>Sort/Filter by No Insurance.

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- 08/14/2012 Walkout Receipt it will automatically save a pdf copy in the patient's document folder. In print preview, select File>Save As PDF. Go to pictures and scans to view receipt.
- 08/14/2012 Collection Module>Added option to filter by Procedure Code. Billing>Collection Module>Click on tab More Filters.
- 08/14/2012 Pictures and Scans>When you import pictures if the file name has illegal characters (, / \ : * ? " < > |) you will receive a warning and picture will not import.
- 08/14/2012 Time clock added a button on Punch OUT Date to copy the Punch IN Date. Click on Time Clock>Administration>View TimeCards and select employee.
- 08/14/2012 You can set an appointment duration in procedure groups and select the group when creating an appointment in the scheduler. General Settings>Masterlist>Procedure Group.
- 08/14/2012 Dashboard View>Added Referring Provider Column.

Version: 12.07.01

- * 07/16/2012 Scheduler (New) Added option to select a group of procedure codes when scheduling patients appointment. At the visit level you can select From Appt. to bring in the codes.
- 07/16/2012 Added option in Statement to Tag emails, tag no emails. Billing>Statements>Select criteria, search. List of names will come up, below names drop down Other Actions.
- 07/16/2012 Scheduler (New) When patient is sent to the waiting list and then rescheduled, the note in the appointment form will show the previous visit.
- 07/16/2012 Added option to search by patient home, work, cell and text phone number>On main screen, Search tab, drop down arrow on Search Field.
- 07/16/2012 Reports>Financial Reports>Daily Summary Report added option to run report by Date of Entry/Date of Service.
- 07/16/2012 Walkout receipt changed heading to read Statement/Receipt.
- 07/16/2012 Dashboard View> Added columns, Who Entered, Date Entered and Time Entered.

Version: 12.06.01

- * 06/12/2012 Option to enter a customized message per receipt at the visit level>Blue Tab>Click on Advanced Note. It will print on Walkout, Today & Payment receipts.

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- * 06/12/2012 Scheduler (New) Drag & Drop Area>button added to open Manage window. Patients in the drag & drop will be listed and appointments can be rescheduled from this window.
- * 06/12/2012 Added option to show credits only, by patient, insurance or both. Reports>Fiancial Reports>Receivables>Sort Receivable Report by Date>Show Credits Only.
- * 06/12/2012 Option to run A/R using Allowed Amounts. Reports>Fiancial Reports>Receivables>Sort Receivable Report by Date>Use Allowed Amounts for More Realistic figures.
- * 06/12/2012 Payment Plan: Added option to change payment plan coupon due date. Go into Payment Plan>Change Hightlighted Plan>Change Day of Month Payment is due on.
- 06/12/2012 Dashboard View Only>Added a separate button on Photos & Scans to access patient's document folder where images and pdf files are stored.
- 06/12/2012 Medical Conditions>Added Alert option to the dropdown for Condition Type.

Version: 12.05.01

- 05/07/2012 Added option to test email in the Recall module. Select Reports, patient report, Patient Recall & Contact Module, on the left hand pane under Extras, Test Email.
- 05/07/2012 Dashboard view, added option to jump to DOS and Time Clock. Patient's screen, click on button Jump To..., Command Prompt or Time Clock.
- 05/07/2012 Scheduler (New) Added option to tag and delete more than one patient from the Waiting List Window. Click on Manage, tag patients, click detete tagged.

Version: 12.04.01

- * 04/04/2012 Print Receipt when posting a co-pay in the (New) scheduler. Highlight pt in resource, right click, post co-pay, continue to payment posting, post, then option to print receipts.
- * 04/04/2012 Added new Report Income by Payer, option to run detail or summary. Reports>Financial Reports>Income by Payer.
- * 04/04/2012 Patient Demo if you enter anything in the email address area that does not have an @ sign you will receive a warning. "Not a Valid Email Address"
- * 04/04/2012 Dashboard view can be maximized, you can change the view of the main screen. Go to My Settings>Preferences and select Opening Screen Type: Dashboard
- 04/04/2012 Added C-Spire to text carriers in patient demographics.

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- 04/04/2012 Delinquents, if a patient has more than one visit when batch printing letters it will print one letter with patient total balance.
- 04/04/2012 Added Patient Search options to Dashboard view.
- 04/04/2012 Option added text only in the Recall and Contact Module. Go to Reports>Pt reports>Recall, select criteria, view list and select Output To Text Only.
- 04/04/2012 Report: Payment by Type, option added to criteria Date Type to run by Date Entered.
- 04/04/2012 Added Cricket to text carriers in patient demographics.
- 04/04/2012 (New) Scheduler, Reminder added and highlighted in yellow in the appointment form under the Appt Hx tab.

Version: 12.03.01

- * 03/01/2012 Added the ability to search for a patient using the first 3 letters of the last name, then a comma, then the first 3 letters of the first name. (Only in the Dashboard view)
- * 03/01/2012 Added: Warning "Update is being Installed, please try again later" this warning will appear if you open program during installation of the update.
- 03/01/2012 When posting an insurance payment in batch or at the visit level, if patient has secondary ins, the co-insurance and deductible fields will default to the secondary.
- 03/01/2012 Added option so that end users can't close out of Pmessenger until the Main program is closed. General Settings>Admin>General>Do not allow closing of Instant Messenger
- 03/01/2012 Added the ability to search for insurance companies by payor ID numbers>General Settings>Master Lists>Insurance companies>There is a tab: By Electronic payor ID
- 03/01/2012 Added New Appts to criteria options in>Reports>Administrative reports>Activities logged>Search for:
- 03/01/2012 Added Metro pcs as a cell phone carrier>Patient Demo>Other phone/email>Carrier.
- 03/01/2012 Aging Criteria added to the Collection Module
- 03/01/2012 Show the user's name in the Deleted Transaction tab of the audit trail.
- 03/01/2012 Added the word TEXT to the droplist of preferred Contact methods>Patient demographics>Preferred Contact Method.
- 03/01/2012 Enabled sorting for Referring providers>General Settings>Masterlist>Referring Providers

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- 03/01/2012 Added option to select a specific printer for prescriptions>My Settings>Printers
- 03/01/2012 For duplicate/void claims, type the original ref number in the prior auth field at the visit level, select F8 as the qualifier: this will generate the 2300 ref segment for 837 file.
- 03/01/2012 Option added in the insurance master list for each company asking whether to send Supplemental Identification Numbers electronically.
- 03/01/2012 Added new tokens>Most recent dx and Most recent dx description.

Version: 12.02.01

- * 02/08/2012 Report>Patient Reports added new report called Patient Age Distribution.
- * 02/08/2012 Ability to email Referring Physician from patient Documents. Create Document, click on print for preview of the document, on the top menu select Email to...
- * 02/08/2012 General Settings>Admin>Charge Defaults>If Normally accept assignment is set to YES, then when entering a new policy for a patient if the default for that specific insurance company is set to NO, a message will come up asking if you want to keep the current default.
- * 02/08/2012 Patient Demographics>Other Phone/Email Tab added option to test text message with patient.
- * 02/08/2012 Scheduler (New)>My Settings>Preferences>use shaded horizontal bars to give visual cues to the time being clicked on to make an appointment.
- * 02/08/2012 Reports>Batch Print Encounter Forms added option to sort Dx codes and Procedure codes alphabetically on the encounter form.
- 02/08/2012 General Settings>View Documents>Added preview of document created. CheckTokens/Preview
- 02/08/2012 Patient>Added an SSN field to the Primary Billing party screen.
- 02/08/2012 General Settings>Securities> if staff member does not have permission to Allow Adding of Charges, they will not have permission to add Manage Care Authorizations.
- 02/08/2012 Billing>Delinquents>added tab Exclude Specific Patients, so you can select which patients to batch print letters.
- 02/08/2012 My Settings>Preferences>Added option to launch Dashboard or List view of main screen per workstation.
- 02/08/2012 Master List>Procedure Report Classifications>Added the ability to tag procedure codes and place them in a specific procedure classification.

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- 02/08/2012 Patient Recall and Contact Module>Added option to select Appt Description to the criteria for (Any Appointment) search only.
- 02/08/2012 Reports>Patient Reports>Batch Print Encounter Forms>Added option to print Patient Info Sheet in batch.
- 02/08/2012 Scheduler (New)>Waiting list>Added patient phone number. Highlight patient and the phone number will appear below (near) the delete button.
- 02/08/2012 Reports>Administrative Reports and Financial Reports re-arranged buttons in the screen.
- 02/08/2012 Actions for Highlighted Patient>Print>Envelopes>Added option to print envelope for Referring Physician.

Version: 12.01.01

- * 01/09/2012 Main Screen, Billing Tab>Delinquents>added tab Exclude Specific Patients from batch printing letters.
- * 01/16/2012 Option added on most reports to save as a PDF. Run report, click on File>Save As PDF.
- * 01/09/2012 Documents>Added the ability to send patient letters by email. Go to Document>Select Print in the left hand pane, in the top heading of print preview click Email to...
- * 01/09/2012 Scheduler (New)>Added the ability to right click on daily view appt grid to add a single instance of a color block for that date and time only, it only works on empty appt slots.
- 01/09/2012 Walkout Receipt>Added units receipt. It only shows if there is more than one unit. The units will display in front of the description.
- 01/09/2012 Main screen>Billing tab>Visit Status Listing>added filter for billing and treating providers.
- 01/09/2012 Reports>Summary option added for Income, Charges, Claims Submitted, Claims Not Submitted and Payments by Type. Added Totals to Procedure Frequency report.
- 01/09/2012 General Settings>Added Visit Status Codes to the Masterlist.
- 01/09/2012 Visit Screen added additional fields for DX codes.
- 01/09/2012 Report>Aging Report>Type of Balance: Ins Balances, added Last Insurance Payment to Age According to criteria.
- 01/09/2012 Tokens>Added a token to pull in patients default photos into documents. Token name is Default Patient Photo.

Revision History ALL

01/09/2012 Scheduler (New)>Appointment form, patient info tab shows Insurance Company name instead of just the insurance code.

Version: 11.12.01

- * 12/15/2011 Scheduler (New)>In the appointment form tab added Appt Hx, this tabs shows appointment history for pt.
- * 12/15/2011 Scheduler (New)>When entering a new appointment, in the appt form a tab added called Patient Info, this shows pts contact information and insurance information.
- * 12/15/2011 Scheduler (New)>Added expansion button so you can view appointment notes from the patient flow and the daily view screens.
- * 12/15/2011 Recall Module>Added the ability to send text messages to patients to remind them of their appointments.
- 12/15/2011 Add the ability to unlock chart notes.
- 12/15/2011 Scheduler (New) When switching from List View to Daily View, the columns in Daily view shrink. Opt added in Admin>Scheduler: Put a check mark in Turn Off Column Width
- 12/15/2011 Main Screen>Under Patient>Dashboard>added button to access Patient Demographics.
- 12/15/2011 Action for Highlighted Patient>Added option to print the Patient info Sheet under the print option.
- 12/15/2011 General Settings > Admin > Security>Option added for each user that says Set Opening Windows to centered for this user. If box is checked screens will open in the center.
- 12/15/2011 Reports>Procedure Frequency>Added Grand totals for paid, adjustment and due to report.
- 12/15/2011 Single scan and multi scan, you can add/change/delete the document types for the TYPE dropdown list.
- 12/15/2011 Report>Income Report added summary to criteria.

Version: 11.11.02

- * 11/18/2011 Scheduler (New)>Added new screen which displays number of pts under each resource. To view, click on Appointments>Distribution by Resource.

Revision History ALL

- * 11/18/2011 Line item posting screen: Main Screen>Visits> Line Item Posting. The screen shows the breakdown of payments by procedure and allows posting by procedure. This will work on new payments going forward. To turn this feature on: General Settings > Admin > uncheck Hide Line Item Posting
- * 11/27/2011 Patient letters can now be held for review and approval before printing. Mark the letter as needing review and then the review can see all the letters waiting for review from Main Screen > Today > Review Documents. Security may be used to restrict access if desired.
- 11/18/2011 Scheduler (New)>Appointments>To Be Confirmed>Added option to email report.
- 11/18/2011 Provider default, added a field for extension.
- 11/18/2011 Reminder>Extras>Added Print List so you can select a date range to print your reminders.
- 11/18/2011 Main Screen>Billing>Visit status listing>Added totals and option to print and export the results.
- 11/18/2011 Billing party information window>Marital Status dropdown, added Widowed and Lifepartner.
- 11/18/2011 Scheduler (New)>Reports>Appts by description>added option to print the note from the appointment form.
- 11/18/2011 Collection Module>Company Snapshot>Added a line Change in A/R this month.
- 11/18/2011 Scheduler (New)>Reports>Appts by Description>added location to criteria.
- 11/18/2011 Actions for Highlighted Patient>Audit Trail>Added when an appointment is first created, who created it, what resource, time and provider.
- 11/18/2011 Visit Screen>top portion of screen (Copy Previous Visit Info) now pulls in block 19.
- 11/18/2011 Reports>Patient Reports>Patient Listing By...Reports>Criteria Account Number pulls patient's phone number.
- 11/18/2011 Scheduler (New)>Search for Appointments added Waiting List in the description column.

Version: 11.11.01

- * 11/02/2011 Scheduler (New)>Right click on patients name in the scheduler, we added an option to post patient co-pay in the dropdown list.
- * 11/02/2011 Main Screen of the program> Help button, added email option for technical support.

Revision History ALL

- 11/02/2011 Token for documents added: [NextApptLongFormat] this will add the word AT to appointment, (ie October 29, 2011 at 10:30am)
- 11/02/2011 Patient statements will now print in alphabetical order.
- 11/02/2011 Tokens in documents added additional tokens: [Patient Balance without text] [Insurance Balance without text] this will remove the words Pt Bal and Ins Bal
- 11/02/2011 Report>Claims Not Submitted>added export feature and visit status.
- 11/02/2011 Added export feature to Masterlist report> Fee Schedule, Procedure Code and Procedure codes with Prices.
- 11/02/2011 Scheduler (New): If you maximize the Daily Resource window and close out of the program, when you re-open the scheduler it will retain the scheduler window size.
- 11/02/2011 Statement>Statement List will print the status column for email only.
- 11/02/2011 General Settings>Administration>Security>If you add a check mark to Allow Access to Scheduler only, staff will only be able to access the scheduler.
- 11/02/2011 add a right click menu choice to the patient flow > All Patients Being Seen Today, to allow the appointment to be viewed or changed

Version: 11.09.01

- * 09/26/2011 Pictures and Scan>Option added to Save a copy as a PDF. Highlight picture group, print and place a check mark to save a copy.
- * 09/26/2011 Pictures and Scans>Added option to create custom types. Pictures>Select Insert>type of Docs>add a new or use existing. Select where the file is located and add it to doc type.
- 09/26/2011 Reports>Patient Reports>Patient age report added a patient total for the entire report.
- 09/26/2011 Reminder report: added patient name and phone number to report.
- 09/26/2011 Reminder appears above Activity at a Glance, this will only show reminders that are not past.
- 09/26/2011 Scheduler (New)>Reports>Current Day Appointments>List Style: added Due now.
- 09/26/2011 Activity At A Glance: added patient's name, date of service and Doctor's name to report.
- 09/26/2011 Patient Token: Added \$ to patient balance.
- 09/26/2011 Option added to suppress statements via email for patient.
- 09/26/2011 Scheduler (New)>Appt form>If you select a proc code in Desc of Appt and the proc code has a duration that is not 0, this will set the appt duration.

Revision History ALL

- 09/26/2011 Billing>Delinquents added Advanced search options.
- 09/26/2011 Scheduler (New)>Appt form: Added a default proc code to the Appointment descriptions, and if a code is selected, it will auto fill in Procedure code 1 on the appointment form.
- 09/26/2011 Scheduler (New)>Select Resources to View: Settings are saved when the scheduler is exited so that they automatically are set the next time the scheduler is opened.
- 09/26/2011 Statements>Added option: Do Not Print Old Late Fees.
- 09/26/2011 Added option to suppress sending statements via email for Billing Party.
- 09/26/2011 Administration>Security>Added option Allow Access to Chart as part of the Clearance.
- 09/26/2011 Scheduler (New)>Added to the appointment form, Intake, Eligibility, Transcription and Other. If any of the fields are checked it will display in scheduler in List View.
- 09/26/2011 Main Screen added billing party to Search Criteria.

Version: 11.08.03

- * 08/23/2011 Scheduler (New)>Added option to view archived appointments.
Appointments>View archived appts.
- * 08/23/2011 Ability to transfer credits between family members. (Only works if the primary billing party is the same on the visit with the credit and the visit you are transferring the credit to.)
- 08/23/2011 Timeclock:Administration>Maintain Employee Info>Security Pin, if an employee is setup with a pin number, the View Your Hours List will require their pin number to run.
- 08/23/2011 Statements>Added option in the statement criteria to select>Also Create PDF and attach to Patient record. If this option is selected, program will not ask when printing statements.
- 08/23/2011 Scheduler (New)>Report>Appointment with No Charges will run when scheduler is set to All locations.
- 08/23/2011 Aging Report>You can run this report to show patients with a Credit Balance.
- 08/23/2011 Statements>Added option to suppress Units. (paper only)

Version: 11.08.02

Revision History ALL

- * 08/12/2011 Patient Demographics>Added Alternate address field and a button to swap alternate address with primary.
- * 08/12/2011 Recall Module>Existing Recalls> Added option to select more than one recall type.
- * 08/12/2011 Scheduler (New) Patient Flow view>Added pink color to the columns time and resource to indicate that it is the patient's birthday.
- * 08/12/2011 Billing>Statements>Troubleshooting>Test Email:This tab will send an email to sender's email address to confirm the email is working.
- 08/12/2011 Patient Deletion>If a patient has documents or pictures attached, you will receive a warning before deleting the patient record.
- 08/12/2011 Scheduler (New)>Added patient account number to All Resources detail report.
- 08/12/2011 Scheduler (New)>Patient option to print patient policy number on appointment daysheet.
- 08/12/2011 Patient Demographic: Added field for text message phone number.

Version: 11.08.01

- * 08/01/2011 Added Reverse payment for insurance and patient payments that have not been made by a credit card. You can select the amount you want to reverse.
- * 08/01/2011 Added option to select 4 procedures to be associated with an appointment which can be pulled into the visit screen by selecting button From Appt at visit level. (New Scheduler)
- * 08/01/2011 Reports>Administrative>Activites Logged>This report pulls information from the Activity at a Glance. You can run this report by date range, for statements, claims or all.
- * 08/01/2011 Billing>Statements>Option to send statements via email. You will need to go into your Email Settings and enter the your email setup.
- * 08/01/2011 At the visit level added an option to copy last visit and bring forward charges.
- 08/01/2011 Treatment Plan added an option to assign a visit number for a specific procedure in the plan.
- 08/01/2011 Reports>Administrative Reports>Patient by Referring Source>Sort by Referring Doctor. Added address and phone number to the report
- 08/01/2011 Time Clock>Payroll Report (HH:MM) changed from military time to standard time.
- 08/01/2011 Reports>Patient Reports>Patient Listing by Reports>Added option to run report by Billing Cycle.

Revision History ALL

- 08/01/2011 You can view Reminders for a specific patient from Actions for Highlighted Patient and in Easyview.
- 08/01/2011 Main Screen>Todays Visits>Added an option to print the list.
- 08/01/2011 Pictures and Scans>Picture Groups>Option added to remove patient data and computer clock date from the print composite report.
- 08/01/2011 Actions for Highlighted Patients>Audit Trail and Log>Added a tab called Patient Log to show the patient visit logs.
- 08/01/2011 General Settings>Referring Providers>Added fields Date of Birth and Date of First Meeting.
- 08/01/2011 Added option at the bottom of the visit screen to print primary insurance labels.

Version: 11.07.02

- 07/15/2011 New Scheduler>When a closed date is set on the small calendar it will now show the letters CL (closed) for that day of the week.
- 07/15/2011 Additional Saluations added to Billing Party.
- 07/15/2011 Added patient account number and phone number to Scheduler report: Current Day Appointments>List Style.
- 07/15/2011 Patient Recall Module now shows a total of patients that are in the queue.
- 07/15/2011 Option to supress Letterhead on Payment plan if needed.

Version: 11.07.01

- * 07/06/2011 General Settings>Administration>General Settings: Added option to create your own scan descriptions.
- * 07/06/2011 Added an option to make a user inactive. To see this option you must sign on as administrator, then select the user you want to make inactive.
- * 07/06/2011 Reports>Administrative Reports>New report added Search for Payments. You can search by check/authorization number.
- * 07/06/2011 Statements: Added an option to print PDF. Statements can be viewed from patients pictures.
- 07/06/2011 Batch Transmit Electronic claims: Added Carrier ID, Receiver ID, Sender ID and Submitter ID to configure edits.
- 07/06/2011 Batch print/electronic claim forms: Option to select Billing provider.

Revision History ALL

07/06/2011 Reports>Administration>Added patient count to total in Patient By Treatment start/end date report.

Version: 11.06.01

- * 06/06/2011 Reports>Administrative Reports>Patient Listing by>Ins Company shows percentages of patients per insurance company.
- * 06/06/2011 General Settings>Master List>Added Procedure classification, create classification and then Report Class at the procedure level. Frequency reports will run by class.
- * 06/06/2011 Added fields Race, Ethnicity and Language to patient info. To activate this option, go to General Settings>Administration>Patient Defaults, place check mark in Ask Race.
- 06/06/2011 Recall Report: Criteria information will display in header of the Recall Report.
- 06/06/2011 When posting a COT payment the check number will display in the description field at the visit level.
- 06/06/2011 Scheduler (New): When entering an appointment for a patient, the appointment form will show who entered the appointment.
- 06/06/2011 Reminders: Added a print option.
- 06/06/2011 Payplan Ledger: Downpayment paid date added to the ledger.

Version: 11.05.01

- * 05/05/2011 Walkout receipt: Added a Today Receipt at the visit level to show payments made for that day.
- * 05/05/2011 Reports>Patient Reports>Added Patients by User Defined fields report.
- * 05/05/2011 Billing>Delinquents>Added option to print collection letters.
- * 05/05/2011 Billing>Post Large Ins Check>Ins Check Details added an option to change visit status.
- 05/05/2011 General Settings>Administration>Messages: Option added to make the message within the aging criteria inactive.
- 05/05/2011 Ledger Report>Option added to show patient payments only.
- 05/05/2011 General Settings>Administration>Choose opening screen for pictures and scans.
- 05/05/2011 Patient Dashboard: Option added to print from the Appointment List.

Revision History ALL

- 05/05/2011 Statement: Option added option to print the statement list for a Single patient.
- 05/05/2011 Notes: Who entered, Date entered and Time entered are hardcoded.
- 05/05/2011 Tooltip added to show user name when program is minimized
- 05/05/2011 General Settings>Administration>Option added Do Not Print Page Numbers on Patient Letters.
- 05/05/2011 General Settings>Master List>Added Pharmacy List.
- 05/05/2011 Scheduler(New)>Reports>Current Day Appointments>Appointment Day Sheet: added Note Type selection.

Version: 11.04.01

- * 04/10/2011 New Scheduler Only> You can now drag and drop a patient from the waiting list directly into the reschedule box or into the column area.
- * 04/10/2011 Report>Added new report Procedure Payment Report, this report runs by payment date.
- 04/10/2011 View Only Mode has been added to transfers located in the claim.
- 04/10/2011 Reports>Patient Status report: date range added to report which will show when a status has been changed. Report will show any changes made to statuses after this update.
- 04/10/2011 Reports>Procedure Frequency filter added for Patient Status.
- 04/10/2011 Reports>Income Report added option to Show Patient Payments Only.
- 04/10/2011 New Scheduler Only>You can print the Patient Info Sheet. Right click on patient appointment, select print Patient Info sheet has been added the drop down list.
- 04/10/2011 Patient Info sheet: Option added to remove blank lines and now pulls in Referring Provider.
- 04/10/2011 Reports>Financial Reports>Monthly Summary Dashboard. Added the choose printer option.
- 04/10/2011 Reports>Charge Report>Filters added for Supervising provider, Referring, Assistant and Procedure code.
- 04/10/2011 General Settings>Administration>Scheduler>Added option to Allow Patient Flow to open on Startup.

Revision History ALL

- 04/10/2011 Added a feature called rooms where you can select a room on the appointment form. This will allow customized organization of the boxes on the bottom of the patient flow. There is a drop list that saves to an in file that will allow you to reorganize the boxes by room or resource.
- 04/10/2011 Walkout receipt now says Receipt/Invoice.
- 04/10/2011 New Scheduler Only>Reports> Current Day Appointments>All Resources Detailed. Added extra fields to print Balance and Co-Pay.
- 04/10/2011 If sign-ins are set the last person's user name will be remember when program is closed.
- 04/10/2011 New Scheduler Only: If the patient's appointment is on their birthday, added Happy Birthday to the yellow sticky note.
- 04/10/2011 Tokens added for Secondary Billing Party>SecBpartAddress and SecBPartCSV

Version: 11.03.01

- * 03/18/2011 General Settings>Patient Defaults>Added 3 user defined fields which will display in the patient demographics.
- 03/18/2011 Patient Demographics>added a field for Occupation.
- 03/18/2011 Utilites>Data Tools>Added Subdirectory Wizard.
- 03/18/2011 General Settings>General Options>Added an option to Default Notes to Locked. This does not apply to EMR or other charting programs, only notes entered into main program.
- 03/18/2011 Master List>Insurance Companies>Free text note field added.
- 03/18/2011 Reports>Financial Reports>Quickbook Forms- Added opt to Skip credit card/EFT, skip reversal.
- 03/18/2011 New Scheduler> Waiting list report now displays the status column.
- 03/18/2011 Billing>Collection Module>Added a Skipped Tab to show reasons why a claim did not appear with filters selected.
- 03/18/2011 Batch Post Large Ins Check>When posting a check, if a charge is already in use in previous unposted batch, you have the option to bring it into the new batch.
- 03/18/2011 Added an option in the Insurance Company master list - Do not split COT into Monthly Charges.
- 03/18/2011 Ortho Chart>Added Height and Weight to Chart Notes.

Revision History ALL

Version: 11.02.02

- * 02/25/2011 Insurance Info master list>if you select an insurance type code, you can run certain reports using Ins type code.
- * 02/25/2011 General settings>Admin>New Scheduler: added a sound alarm option to alert staff if a patient has been waiting too long.
- 02/25/2011 Main Screen> Search option added for DOB
- 02/25/2011 Resolved: When printing the Autopost Error Report, the patients names were cut off.
- 02/25/2011 Todays Visits>Added a status column.
- 02/25/2011 Claims Not Submitted Report>Added option to exclude claims with no insurance balance due.
- 02/25/2011 Scheduler (New): You can access the EMR by right clicking on a patient's appt.
- 02/25/2011 Billing>Delinquents>Added export option.
- 02/25/2011 Activity at a Glance>When a patients statement is printed the due amount will be displayed.
- 02/25/2011 Daily Charge & Payment Summary>Now will subtotal by doctor. This will report will also show POT if not set to ALL.
- 02/25/2011 Billing>Delinquent>Added Activity at a Glance Tab.
- 02/25/2011 Claims not Submitted Report>Now shows claims that have not been submitted to Secondaries and Tertiary.

Version: 11.02.01

- * 02/02/2011 Added a feature in he Billing Tab> Delinquent that shows visits that have aged a certain amount and have received a minimum number of statements
- * 02/02/2011 Payment Methods: You can now create your own payment methods.
- 02/02/2011 Timeclock>You can run a payroll report by individual employees.
- 02/02/2011 Tooltip added to display provider information when hovering over Referring physician or General Dentist in patient demographics.
- 02/02/2011 Audit Trail Summary line will now display the appointment date and time that was changed.
- 02/02/2011 Reports>Patient Reports>added Patients by Employer
- 02/02/2011 Tooltip in scheduler now shows referring physician.

Revision History ALL

- 02/02/2011 Print option added when Viewing an EOB at the batchpost or visit level.
- 02/02/2011 New Scheduler added the ability to minimize the Appointments to be Confirmed screen.
- 02/02/2011 New Scheduler>Appointments to be Confirmed added option to change patient appointment within this screen.
- 02/02/2011 Tokens>added General Dentist token.
- 02/02/2011 Tokens>added Referring Physician email token.
- 02/02/2011 Added family balance information to Account balance in easyview section.

Version: 11.01.01

- * 01/12/2011 Batch Post Insurance Check>Multiple users can batch post checks simultaneously.
- 01/12/2011 Reports>Financial Reports>Receivables>Date report added option to print activity log. It will also export out.
- 01/12/2011 Scheduler> Patient Flow tab no longer displays military time.
- 01/12/2011 Electronic Claims> Added an NTE segment to the 2400 loop whenever a notes is entered on the charge line.

Version: 10.12.02

- * 12/21/2010 Pt Check-in Screen: Added an option in General Settings>Admin>Late Time for Patient Check-in Module. If set, will notify patient that they are late and to see the front desk.
- * 12/21/2010 Batch transmit Electronic Claims>Extras>Configure Edits: this feature will give you the option to turn off specific edits.
- * 12/21/2010 New Scheduler, added option to access patient's demographics. Right click on a patient's appointment and select Access Demographics.
- 12/21/2010 Procedure Frequency will now show adjustments if a check mark is placed in Show Payments option.
- 12/21/2010 Patient Reports>Added new report Patient Listing by General Dentist.
- 12/21/2010 A/R Report>Sort Receivables by: Date>Added option to select a billing cycle.
- 12/21/2010 Treatment Plan Status Report> Added option to: Show Only Items Not Rendered Yet.

Revision History ALL

- 12/21/2010 Treatment Plan> Added option to remove services rendered when printing Treatment Plans for individual patients.
- 12/21/2010 Reports>Daysheet no longer prints a blank page.
- 12/21/2010 Reports>Aging Report added option to run by summary line.
- 12/21/2010 New Scheduler>Patient Wait List now shows status: Cancelled by patient, Cancelled by Office and No Show.
- 12/21/2010 Visit> When you apply a Previous Credit it will now show the date of service the credit was taken from.
- 12/21/2010 Reports>Administrative Reports>Added Prescription Written by Date Range Report.

Version: 10.12.01

- * 12/06/2010 The patient name locator on the main screen will now automatically reset after 5 seconds for your convenience. To turn off this new feature go to General Settings / Admin
- * 12/06/2010 When multiple scripts are tagged for printing, option has been added to print each script on a separate page.
- 12/06/2010 TIN and NPI number will now print on walkout receipt and paper statements if the option is selected in Admin Settings
- 12/06/2010 When printing labels for referring physician the program will now output the salutation.
- 12/06/2010 Option added in EMR Preferences to select a default font size.
- 12/06/2010 Easy View>Appointment History>When printing Appointment history, program brings up Choose Printer option.

Version: 10.11.02

- * 11/18/2010 Main Screen> Search Tab: Added Insurance Policy Number Search, enter all or part of the insurance policy number.
- * 11/18/2010 Actions for Highlighted Patient> Added a quick feature to print statement for one patient using all the current defaults.
- 11/18/2010 New Scheduler>Appointments to be Confirmed>Added a Due Now column. Added same feature to the printed report.
- 11/18/2010 Batch Claims>Electronically or Paper: Added option to print a list of View Skipped Claims.

Revision History ALL

- 11/18/2010 Actions for Highlighted Patient>Audit Trail>Added option to print for current patient.
- 11/18/2010 If a billing/treating provider is linked to patients visits, you can no longer delete the provider from the master list.
- 11/18/2010 Reports>Financial Reports>Procedure Frequency Report: Added option to show payments and balance for procedure code selected.
- 11/18/2010 Reports>Financial Reports>Charge Report - New: Start date for report will default to computer clock date.
- 11/18/2010 New Scheduler>Search for Openings screen will no longer close out your previous view.
- 11/18/2010 Reports>Administrative Reports>Patient Listing By>Account Number: Added option to select a range of account numbers.

Version: 10.11.01

- * 11/05/2010 New Scheduler>Appointment form and yellow sticky note area shows preferred contact number or email address.
- * 11/05/2010 Added the ability to scan or drag and drop EOB's from the Advanced or Simple insurance payment screens on the visit. You can view scan by right clicking on the posted payment
- * 11/05/2010 Main Screen>Today's Visits>Added additional sorts for Place of Treatment and Doctor.
- * 11/05/2010 Main Screen Visit>Activity at a Glance: Option added to insert a log entry for Contact per individual patient visit.
- 11/05/2010 Added Dx codes to the main screen list of visits and the Procedure History window on the Patient Dashboard.
- 11/05/2010 New Scheduler>Reports>Appointments with No Charges>Added option to include or exclude certain statuses from the report.
- 11/05/2010 General Settings>Admin>Added options: Do Not Autofill Providers, this will leave the provider field blank at the visit, when you click ok you must select the provider.
- 11/05/2010 New Scheduler>Reports>Appt with No Future Appt> Added Date Range and Appt Description to search criteria.
- 11/05/2010 General Settings>Admin>Added option to Select which Visit to copy from. When you enter a charge copy, visit info from a visit date you select. Proc codes will not copy over.

Revision History ALL

- 11/05/2010 General Settings>Administration>Added option to Make Place of Treatment Mandatory once visit has been added and you click ok to exit the screen.
- 11/05/2010 Added a column for Dx codes in the Billing Party Ledger screen and Report.

Version: 10.10.02

- * 10/27/2010 New Scheduler> Added a tab Select Resources to View, you can tag which resources you would like to display in the daily view.
- * 10/27/2010 Reports>Daysheet>Advanced Options> Added option to sort entries by either patient name or the order in which they were entered.
- 10/27/2010 Color blocking issue resolved: The program will allow color blocking up to 30 columns.
- 10/27/2010 Scheduler: List View was not saving the change when an appt was marked it confirmed, this has been resolved.

Version: 10.10.01

- * 10/15/2010 Reports>Daysheet options> Print by Date of Service, show charges, payments or both.
- * 10/15/2010 Billing>Batch Post Large Ins Check>Added the ability to autopost from ansi 835 ERA file.
- * 10/15/2010 Batch Post A Large Ins Check, you can drag and drop an EOB and attach to the batch.
- 10/15/2010 Payments entered onto forms that are marked as Pre-Treatment estimates will now appear on the Daysheet report.

Version: 10.09.02

- * 09/24/2010 Instant Messenger: added sound to incoming message.
- * 09/24/2010 Reports>Patient Reports>Patient List Report> You can select a specific zipcode. Report will show a list of patients and a count for a particular area.
- * 09/24/2010 Procedure Frequency report> The report now list the insurance company names. Detail report can be exported and sorted in excel.
- 09/24/2010 Reports>Patient Reports>Patient Age Report> Added gender to the selection criteria.

Revision History ALL

Version: 10.09.01

- * 09/01/2010 Added an option to display charges only at the visit level. If you select the option, it will hide all other transactions and display only charges.

Version: 10.08.02

- * 08/25/2010 Pt Flow - Added (!) at the beginning of the description to indicate the patient has a Medical alert. Right click on the description and click on alerts to view the condition.
- * 08/25/2010 Added a visits by status window (main screen / Billing / Visits by Status) to allow viewing of all visits with a specific status.
- * 08/25/2010 Added a tab Todays Visits on the Main Screen, this screen will allow you to view claims entered on a specific date and the ability to access the claim from this screen.
- * 08/25/2010 Scheduler (new) Added maximize option for Daily View. If more than one view is maximized use Cascade tab on tool bar to minimize the windows.
- * 08/25/2010 Batchpost Large Ins check, added speed to window to " View Posted for Highlighted Item".
- 08/25/2010 Batch Process Large Insurance check, you can now scan the EOB prior to posting the check.
- 08/25/2010 Search by Patient, if you check off "only show appointments from today forward" the box will remain checked. Added to the Old scheduler.
- 08/25/2010 Dental Charting> added option to access Perio chart.
- 08/25/2010 Statements print to file is now showing the balance due from the patient.
- 08/25/2010 Report added to Master List>Appointment Description with the time durations listed.

Version: 10.08.01

- * 08/10/2010 To archive visits with zero balance go to: File>Utilities>Data Tools>View & Archive Data>. Select the Visits tab and enter the date range.
- * 08/10/2010 Batch Post Ins Check: Added the ability to scan an EOB and attach it to the batch. You can also view the EOB at the bottom of the visit by right clicking the payment line.
- * 08/10/2010 Batch Post Ins: Added the ability to update patient demographics from the Batch Post Insurance check screen.

Revision History ALL

- 08/10/2010 Report Daysheet: Option to remove Logo from printing on the Daysheet.
- 08/10/2010 Scheduler: Added the ability to Hide Buttons on the Pts Flow screen (label and receipt buttons). Go to General Settings>Administration>Scheduler.
- 08/10/2010 Scheduler: Option to select Patient Flow colors. Go to General Settings>Administration>Scheduler>Set Patient Flow Colors
- 08/10/2010 Recall Cards: Added the option to suppress the recall date so it does not display on recall cards.
- 08/10/2010 My Settings>Printers> Added option to select a specific printer for Triple Receipt.
- 08/10/2010 Batch Post Ins Check: Added "after posting" totals to the Select Pt and Visit window in batch post so you can see what the final balance on the visit will be after posting.

Version: 10.07.02

- 07/21/2010 Pt Aging Report: In the search criteria added a range of ages and the option to sort by name or age.
- 07/21/2010 Master List Reports>Procedure Code Prices, will now print Restriction Days set on a procedure code.
- 07/21/2010 Dashboard: Added Chart button.
- 07/21/2010 Scheduler Report>Appointments to Confirm> Export feature will output the alternate number entered into the appointment detail.
- 07/21/2010 Scheduler Report> Current Day appts> All resources large cells, added option to print patient telephone number or appointment note (20 characters) New Scheduler only.
- 07/21/2010 If a default fee schedule is set in the Insurance company master list, when you select the ins for a pt you now have the option to overwrite the default fee schedule set in Admin
- 07/21/2010 Dashboard: Added Insurance company button to view the patients insurance.

Version: 10.07.01

- * 07/08/2010 Color Blocking- you can now use the same (description) in Description of Appointment Color Block multiple times when creating the blocks.
- * 07/08/2010 Added feature>Hide inactive patient from Main screen. In Patient Demographics>below employer/school information, place a check mark in Make a Patient Inactive.

Revision History ALL

- 07/08/2010 Picture Groups: Added blank.jpg to allow more flexibility to create photo presentations. Drag the blank.jpg into the position in the group where you want to leave a blank space.
- 07/08/2010 Post Large Ins Check: you can now view claims that were posted in the batch. (Viewing purposes only)
- 07/08/2010 Scheduler>Appointments>To be Confirmed: In the view area added column to Contact info showing optional name. This information pulls from patient's demo, Xtra contacts.
- 07/08/2010 Scheduler Report> Appointments to Confirm will now print the Tel number that appears in the Appointment Detail Tel number field if number was replaced with an alternate.
- 07/08/2010 Added export feature to Claims Submitted Report.
- 07/08/2010 Ochart>Extraction Letters - Added printer dialog box when printing letters.

Version: 10.06.02

- * 06/22/2010 Warning has been added when program opens if w/s is running Microsoft Security Essentials - Information about the warning is provided or opt to disable warning.
- 06/22/2010 Added option to Charge and Payment Summary report to subtotal by Place of Service.
- 06/22/2010 Export feature added to Old Scheduler>Reports>Appointments to confirm.
- 06/22/2010 Added Practice Name at the bottom of Financial Reports. To enter practice name, go to General Settings>Administration>Letterhead enter Practice name here.
- 06/22/2010 Charge and Payment Summary report: sort option added>Referring Doc
- 06/22/2010 Export feature added to>Admin Reports>Patient Listing by...Reports
- 06/22/2010 Added option to Charges report - New: to subtotal by Place of Service.

Version: 10.06.01

- * 06/03/2010 Added option to make an insurance company inactive by a specific date, which will turn the company code red in the insurance list.
- * 06/03/2010 Patients demographics: Added location field.
- * 06/03/2010 New Scheduler: Added option to Color Block by a specific doctor.
- * 06/04/2010 Added option to make DX and Procedure codes inactive by a specific date, which will turn the code red in the insurance list.

Revision History ALL

- * 06/03/2010 Added clearance option in Securities: General Settings>Security> Allow viewing of the company snapshot in the Collections Module.
- 06/03/2010 Batch Claims: added option to select a specific patient to print in Batch Transmit Electronic Claims and Batch Print Insurance Forms.
- 06/03/2010 Added Payment Plans to security feature: If you do not give permission to delete payments it will prevent the manual override of payments in the Payment Plan.
- 06/03/2010 add a subtotal by treating doctor to the charges report (old)
- 06/03/2010 Patient List Report: Replaced social security numbers with account number.
- 06/03/2010 New Scheduler: Added a supplemental note field to the appointment form.

Version: 10.05.02

- 05/24/2010 When you mark an employee inactive in the timeclock, the employee's name no longer appears in the sign in dropdown window.
- 05/24/2010 Added option to run the A/R report by detail or summary.
- 05/24/2010 Added report for patient alerts. Reports>Patient Report>Patient Alerts and Conditions List.
- 05/24/2010 Added report View Skipped Claims to Batch print insurance forms to paper or electronically.
- 05/24/2010 Reports- Patients Seen Between Two Dates has been moved to Administrative Reports.
- 05/24/2010 Added export feature to reports>Patient report>Patient Age report.
- 05/24/2010 The Copy Last Visit button will no longer copy the destination from the last visit if the destination is blank.
- 05/24/2010 Added a button called Dashboard on the left hand pane of the patient screen. Highlight a patient, click on the Dashboard it will bring up various options for this patient.

Version: 10.05.01

- * 05/04/2010 Dymo payment receipts: if a patient has an outstanding balance the receipt will now print entire balance due now.
- 05/04/2010 Added export option: New Scheduler> Reports>Appointments to confirm.
- 05/04/2010 Ability to print two scripts on an 8 1/2 by 14 sheet.

Revision History ALL

05/04/2010 Added tooltips for the first four dx codes on a visit showing the description of the code.

05/04/2010 Added feature: If there is a visit note on a visit then it will display on the main screen when that visit is highlighted.

Version: 10.04.03

04/22/2010 Patient Ledger: added option to run patient ledger by Charges, Payment or All transactions.

Version: 10.04.02

* 04/22/2010 Added Treatment Report Status which shows services that have and have not been rendered. Reports>Admin Reports (non-medical version only)

Version: 10.03.04

04/06/2010 Added a quickbooks style deposit slip to Financial Reports

04/06/2010 Added "Place of Treatment" filter on the main report screen for day sheet and applicable financial reports.

Version: 10.03.03

* 03/23/2010 Added the ability to flag a procedure code if taxable and it will auto-calculate.

03/23/2010 Patient demographics: increased the length of the email address field from 30 char to 50

03/23/2010 Feature added Timeclock - the ability to archive prior years and view the archive data.

03/23/2010 New Scheduler: Added patients DOB to Appt Status Report

03/23/2010 Ortho Charting: Added option to print (Treatment Plan) notes in place of procedure codes for Referral Letters. Ortho charting>Set Preferences>Reference Letter

03/23/2010 Scheduler: Added patients DOB to the select patient window.

Version: 10.03.02

Revision History ALL

- * 03/15/2010 Imaging interface: Added the ability to launch two external imaging interfaces from Actions For Highlighted Patient

Version: 10.03.01

- * 03/03/2010 Added right click menu to patients in the Patient Flow and List views.
- 03/03/2010 Created Utility to move all appts for a specific doctor to a new resource column. (New scheduler only). Feature located File/Utilities.
- 03/03/2010 Waiting List Report: reformatted to show more patients per page (new scheduler only)
- 03/03/2010 Option added to create recurring appts that are excluded from reports, monthly tally, and interfaces.
- 03/03/2010 add a supplemental NPI field and if it is filled then use the supplemental NPI instead of the regular NPI in CMS block 24J and ANSI loop 2310B for the RENDERING provider
- 03/03/2010 added option to print or not print doctor info on payment plan printouts
- 03/03/2010 Added old charges report back into program

Version: 10.02.02

- 02/17/2010 Scheduler: Added total acct balance to the yellow sticky note area and reformatted the note for better readability (new scheduler only)
- 02/17/2010 Added Nickname and patient note field to patient selection list in scheduler
- 02/17/2010 Bug fix: When pulling in a visit in batch to post a payment the allowed amount is not reflecting the number of units
- 02/17/2010 Scheduler: added a menu item at the top of the new scheduler for a quick print of the encounter form
- 02/17/2010 Fixed Get Previous Credit function so that it works for either a patient or insurance credit, even if there is a balance on the visit overall
- 02/17/2010 fixed the problem with the tally not updating in the new scheduler when appts were made on a different station
- 02/17/2010 New report: added Patient Zipcode Distribution Report (Reports / Patient Reports)
- 02/17/2010 Scheduler: Added the ability to print future appts for the highlighted patient by right clicking on the patient name in the new scheduler only

Revision History ALL

- 02/17/2010 Bug fix: Dashboard report was not filtering correctly by doctor and location
- 02/17/2010 Added pretreatment filter to the Dashboard Report
- 02/17/2010 fixed bug that was sometimes causing multiple instances of the new scheduler to open when using Jump To.
- 02/17/2010 Scheduler - Waiting list printout: added a choice of alphabetical or priority sorting (new scheduler only)

Version: 10.02.01

- * 02/07/2010 Payment plans: There is a new feature that allows you to delay all the remaining payments at one time
- 02/07/2010 Added Alt hotkeys to various functions in the scheduler and payment plans
- 02/07/2010 Email export: added salutation to the export
- 02/07/2010 Documents: added Encounter as a type in dropdown list for creating custom encounter forms
- 02/07/2010 Financial reports: Increased the speed of these reports: MTD/YTD, Charges Report, Assistant Charges and Income, Claims Submitted and Not Submitted, Receivables
- 02/07/2010 Treatment Report: Added current treatment month to the report
- 02/07/2010 Added an incremental locator to the drug list
- 02/07/2010 Patient demographics printout: Added date at the top
- 02/07/2010 increased the percentage amount that a fee schedule can be increased by the fee change utility
- 02/07/2010 Actions for highlighted patient: Added ability to print an Ins envelope or label.
- 02/07/2010 added print button to audit trail screen
- 02/07/2010 Patients by Referring Source Report: Added export feature

Version: 10.01.04

- 01/27/2010 Encounter Form: added tokens for insurance and patient balance for the encounter form
- 01/27/2010 Patient Self-Checkin Module: Made birthdate month, day and year autoadvance.

Revision History ALL

Version: 10.01.03

- 01/19/2010 CMS block 24E. When the insurance company type is medicare the dx pointer will default to a single '1' even for multiple dx per medicare guidelines
- 01/19/2010 Scheduler: added location code restriction to color blocks (new scheduler only)
- 01/19/2010 Added utility to import CMS fee schedules Utilities / Data Tools / Import CMS Fee Schedules
- 01/19/2010 Fixed bug where new appts were autofilling with the wrong date when made from the weekly view of the new scheduler

Version: 10.01.02

- 01/10/2010 Patient note field search: You can now search the patient demographic Note field using the Search tab on the main screen
- 01/10/2010 Email referring doctors: There is now an Email button on the referring doctor list that you can use to email any referring doc for which you have an email address entered
- 01/10/2010 RECALLS: New recalls now prefill DR name with treating dr from patient info.
- 01/10/2010 Added reminders function to the new scheduler
- 01/10/2010 Search DX and Procedure codes: Added the ability to search diagnosis and procedure codes by keyword
- 01/10/2010 Added ALT keys to the new scheduler menu functions
- 01/10/2010 Search by first name: You can now search by first name or any part of the name using the Search tab on the main screen
- 01/10/2010 Procedure Frequency Report: Added option to export data to Excel, Word, etc
- 01/10/2010 Dymo labels may now be printed from the Statement screen and include the salutation on the label.

Version: 10.01.01

- * 01/03/2010 Statements: Added ability to print statements to a text file
- 01/03/2010 Claims filing: Added the ability to specify paper or electronics as a filing destination for each insurance company. General Settings / Master Lists / Insurance Companies

Revision History ALL

- 01/03/2010 Charge Entry: Added option to use a Split button to split out the copay, instead of having it happen automatically on all charges. General Settings / Admin / Insurance Defaults
- 01/03/2010 Scheduler: Added color blocking to the weekly view in the new scheduler. (Works only when viewing a specific doctor in the weekly view and doctor matches resource code.)

Version: 09.12.04

- 12/30/2009 Added Resource to future appts report

Version: 09.12.03

- * 12/20/2009 New utility: reset deductible and max allowed amounts at the end of the calendar year (Utilities / Data Tools / Clear Pt Deductibles)
- 12/20/2009 Admin Settings: Added option to turn off audit trail
- 12/20/2009 Patient Checkin: Added Happy Birthday Greeting when patient logs in on their birthday
- 12/20/2009 New Report: Patient Age report for tracking patients whose recall intervals may need to be changed due to entering a new age bracket. Reports / Patient Reports / Pt Age
- 12/20/2009 Windows7: changed location of pbyte.ini file to work with Win7
- 12/20/2009 New Scheduler: added to the main screen, left side menu
- 12/20/2009 New scheduler: put daily tally on calendar in parenthesis to make it easier to read
- 12/20/2009 scheduler: fixed bug that caused incorrect warning about open & close times when rescheduling an appt for a day with different hours
- 12/20/2009 Birthday report: Changed sort order to day of the month
- 12/20/2009 Birthday report: Added patient age and nickname to report

Version: 09.12.02

- 12/14/2009 Scheduler: add an option to start the scheduler (old or new) automatically
- 12/14/2009 Patient Demographics: Added option to include Race (General Settings / Admin)

Revision History ALL

- 12/14/2009 Charge Entry / Assistant required: Added a checkbox in the procedure code master list to designate Assistant Required. Reminder will be displayed during charge entry.
- 12/14/2009 Reports: patient acct#'s added to appointment status report.
- 12/14/2009 Added Revision History to Help Menu
- 12/14/2009 Email Settings for Recalls: increased the allowable PORT in email settings to at least 999
- 12/14/2009 Patient Demographics: changed first field that is automatically selected when changing patient so that the acct# is not accidentally changed

Version: 09.12.01

- 12/07/2009 scheduler - search for openings: Ability to search for an appt by appt block instead of time slots.
- 12/07/2009 Reports>Current Day Appointments>List Style..Added Doctor and Resource to report
- 12/07/2009 Utilities: added utility to copy referring physician from patient info to visits
- 12/07/2009 Added token for current time
- 12/07/2009 Encounter form - preprinted: added token for doctor being seen
- 12/07/2009 Encounter forms: Added most recent dx token for pre-printed encounter forms
- 12/07/2009 Graphs & Charts: Added date range to graphs
- 12/07/2009 Pre-Printed Encounter form: added new tokens for current appt date and time
- 12/07/2009 Tokens: Added a long format date token for next appointment and current date. The long format spells out the month, e.g. December 09, 2009

Version: 09.11.02

- 11/22/2009 Scans & Photos: Added a date below the thumbnail in the Group view. Also added a button to allow a detail view of the files
- 11/22/2009 Procedure Frequency Report: Moved from Admin Reports to Financial Reports
- 11/22/2009 Scheduler: Add option to automatically start when opening main program (General Settings / Admin / Scheduler)
- 11/22/2009 Scans: Added autofill options to speed up scan data entry, and add setup option to not show images after scanning

Revision History ALL

- 11/22/2009 Daysheet: Added option to subtotal by employee
- 11/22/2009 Charge Entry: Procedure code window now automatically comes up when entering a new charge unless it is disabled in the Administrative options
- 11/22/2009 Future Appts Report: Changed sort order to print in date order, present to future
- 11/22/2009 PAY PLAN Report: added doctors information. address phone and logo to bottom of report.
- 11/22/2009 Patient recall report: Added the patient's acct# to the report
- 11/22/2009 Added exported feature to daysheet, deposit slip and referring reporting in financial reports.
- 11/22/2009 Added National Drug Code support. If you mark a proc code as requiring an NDC you will be prompted to choose the drug when entering charges

Version: 09.11.01

- * 11/09/2009 RX: Added option to print scripts either landscape or portrait, with default to portrait. Also added droplist for amount dispensed
- 11/09/2009 Scheduler: increased the patient name display to 25 characters (from 20)
- 11/09/2009 Scheduler: added Secondary Billing party to tooltip
- 11/09/2009 Graphic Ceph Tracing is now available via an interface with Dr. Ceph

Version: 09.10.02

- 10/23/2009 Medical Charting: Added option to view/print exam without including unanswered questions
- 10/23/2009 Walkout Receipt: Added patient name to receipt if patient is not responsible party
- 10/23/2009 Scheduler: Added a right click option to view the highlighted patient's procedure history
- 10/23/2009 Reports>Administrative Reports>Patient Listing By: Added option for email address
- 10/23/2009 Recall Report: Added new List Report to match what is shown on the recall menu
- 10/23/2009 New Report: Patients seen by date range (Financial Reports)
- 10/23/2009 Reports>Financial Reports>Payment plan: added sort by Billing cycle.

Revision History ALL

Version: 09.10.01

- * 10/08/2009 Statements: Added Troubleshooting screen so that you can see why certain statements charges did not print.
- 10/08/2009 Scheduler: Added new status types: Resched by Patient, Resched by Office, cancelled by office, cancelled by patient and Late (NEW scheduler ONLY)
- 10/08/2009 Scheduler: Added an option to suppress the "Warning - This is not a patient" when scheduling a non-pateint (General Settings / Admin / Scheduler)
- 10/20/2009 New Report for Ortho: Income projection based on payment plans and COT's created by date range.
- 10/08/2009 Scheduler: Added preferred contact method to confirmation report
- 10/20/2009 Payments: You can now right click on an existing payment to see how the payment was split between charges
- 10/20/2009 Reports: Add report of income and charges by assistant
- 10/08/2009 Patient Check-in Module: various cosmetic changes
- 10/08/2009 Added option to enable /disable zipcode checking on patient demo screen
- 10/20/2009 Statements: Added the option to put individual notes on statements
- 10/20/2009 Aging Report: Added ability to only include accounts older (aged) than a specified amount
- 10/08/2009 Statements: Statement will now print for a patient if there are charges that are not included in the payment plan, even if the payment plan is currently paid off
- 10/20/2009 Aging Report: now looks at current responsible instead of just primary insurance

Version: 09.09.01

- 09/03/2009 Recall and Contact Screen: Added ability to select patients by diagnosis code and to export data
- 09/03/2009 Patients by Insurance Company Report: Improved the layout of this report and included secondary and tertiary payers
- 09/03/2009 Payment screen: EFT is now a choice in the Type of Payments dropdown list
- 09/03/2009 Statements: Added a place for the patient to record the credit card security code
- 09/03/2009 Statements - Print List: Added totals and fixed phone # printing problem
- 09/03/2009 Timeclock: an option was added to disable the See Who is Here and View Your Hours functions

Revision History ALL

- 09/03/2009 Timeclock: Admin screen is now hidden until successful sign-in
- 09/03/2009 Main Screen Patient List: If you resize the columns the new sizes will be remembered
- 09/03/2009 Letters: You can now sort the letters by type by clicking on the column heading in the list
- 09/03/2009 Patient Demographics - Employment Status: Added choices of Retired and Other
- 09/03/2009 CMS 1500: 9 digit zipcode will now print correctly no matter whether entered with a dash or a space between the 5 digit and 4 digit parts
- 09/03/2009 Scheduler: You can now just move the mouse over an appointment to see information about the appointment instead of clicking on it.
- 09/03/2009 Changing procedure prices: Added the ability to do this in a faster "spreadsheet" format in Utilities
- 09/03/2009 Appointment History Report in Easyview: Fixed problem with date showing as 1966 when the patient was on the waiting list for an opening.
- 09/03/2009 Patient Labels: Fixed problem with some chart label info sometimes printing on patient labels
- 09/03/2009 Treatment Plans: You can now just type in the procedure code instead of using the lookup button and the prices and splits will be entered automatically
- 09/03/2009 Scheduler - Search for Open Appointments: Now takes into account early closing times on a specific day
- 09/03/2009 Patient Demographics - Changing address: If you change the patient address the program will offer to change the billing party address automatically if it is the same
- 09/03/2009 Photos & Images: When importing a new photo with the same name as an existing photo, a choice will now be given to keep both or replace the original
- 09/03/2009 Patient demographics - zipcode will now lookup the city and state even if it is typed in instead of using the zipcode lookup button
- 09/03/2009 Scheduler: Added the following info to the yellow preview area: DOB, nickname, primary insurance, primary billing party & phone #, patient note
- 09/03/2009 Patient Notes Report: New option allows printing of all notes of all types on one report
- 09/03/2009 Scheduler Waiting List: Added ability to print and included contact info
- 09/03/2009 Scheduler: Added Nickname to yellow preview area, patient flow, and confirmation list
- 09/03/2009 Patient List Report: Added date range criteria and better format for report

Revision History ALL

- 09/03/2009 Timeclock: There is now an option to let employees change their hours and enter a reason. There is also an option for them to be able to print their hours
- 09/03/2009 Scheduler Waiting List: now pulls appointment description from original appointment
- 09/03/2009 Fixed problem with second insurance not showing up on visit screen when the patient had two primary insurance companies

Version: 09.07.01

- 07/21/2009 Added a Total Charges field at the bottom of the charge screen for information
- 07/21/2009 Due to Duplication and space constraints the Printing of labels and Encounter form for highlighted patient has been moved to the Activities for highlighted patient.
- 07/21/2009 Late fees: Added a minimum balance amount to the search criteria
- 07/21/2009 Added anesthesia billing capability
- 07/21/2009 Scheduler: fixed issue with color blocking on weekends
- 07/21/2009 fixed problems with highlighting selected patients when the status color is set to an unusual color
- 07/21/2009 Revised security allow easier adding of users and clearances
- 07/21/2009 Scheduler: added the patient copay info to the yellow Selected Patient Information box in the upper right hand corner.
- 07/21/2009 Ortho Chart: Added the ability to change patient status when viewing chart
- 07/21/2009 Added Copy Last Visit button to pull info from last visit into a new visit
- 07/21/2009 Added status filter to aging report. Program to allow you to include or exclude a specific patient status.
- 07/21/2009 Added report of patients start / end treatment dates
- 07/21/2009 added the ability to refresh the patient flow using the f5 key
- 07/21/2009 DENTICAL: Now fills the EVC # from prior authorization and the BIC issue date with the effective Date from of the card. in the ptins.
- 07/21/2009 Added additional information to the demographics printout in easyview and added a second printout of the text box on the right side of the easyview screen
- 07/21/2009 Reminders can now be created for specific users and linked to a specific patient. Also, the reminder comes up when the schedule is first opened

Revision History ALL

- 07/21/2009 Added patient phone number and referring doctor to main screen (scroll right using right arrow)
- 07/21/2009 Added the ability to view payments on a particular procedure by right clicking on the charge and selecting View Line Items
- 07/21/2009 Future appointments report in Easyview: Added the day of the week
- 07/21/2009 added ability to set preferred phone# and/or email address for appointment confirmations
- 07/21/2009 Ortho Charting: Added the ability to view patient appointments from their chart
- 07/21/2009 Scheduler: Added ability to create Daily Note by location (new scheduler only)
- 01/10/2010 Scheduler will now warn you if you attempt to make an appointment for a past date (new scheduler only).
- 01/10/2010 scheduler audit trail: track the original and rescheduled time and date in the audit trail
- 07/21/2009 Fixed Copy Last Visit to include date info and months of treatment
- 07/21/2009 Added option to print appointments (all resources) in black & white instead of color (new scheduler only)
- 07/21/2009 Prescriptions: Added access to Allergies from prescription writer. Made the button red if allergies exist. Display Last Dx on prescription screen for reference.
- 07/21/2009 Added ability to batch print walkout receipts (Reports / Administrative Reports)
- 07/21/2009 Fixed problem with payment plan balances not showing as being due until the day after the due date.
- 07/21/2009 Reminders: Added warning when changing date & time that alarm must be changed also (new scheduler only)
- 07/21/2009 Scheduler: Fixed problem with Closed day not appearing on refresh. Also changed closed color to grey
- 07/21/2009 You can now see the note on a charge line by using the right arrow to scroll to the right
- 07/21/2009 Scheduler: Right clicking on appt and selecting Mark Appt As Confirmed will automatically fill in the confirmed date.
- 07/21/2009 New Report: Patients by treatment start / end date (administrative reports)
- 07/21/2009 added doctor column to prescription screen. Also now display doctor name drug and DEA number based on highlighted prescription. Also display patients DOB
- 07/21/2009 Added ability to print envelopes for the patient or responsible party (Actions For Highlighted Patient / Print / Envelopes)

Revision History ALL

- 07/21/2009 add dr column to prescription screen. Also display dr name drug and DEA number based on highlighted prescription. Also please display patients DOB
- 07/21/2009 EMR: Added buttons on touch screen interface to remove unanswered questions
- 07/21/2009 Added field for General Dentist on patient info for orthos.
- 07/21/2009 Added a check box to print current day > all appointments detailed with openings to print grayscale for black/white printers. New scheduler only
- 07/21/2009 fixed the problem with insurance company codes being longer than 8 characters

Version: 09.03.01

- * 03/26/2009 New encounter form option, customizable fields for printing on preprinted encounter forms.
- 03/26/2009 made 30 char note field to be more apparent on main screen.
- 03/26/2009 TRIPLE Receipt: to full sheet paper in scheduler now prints even if no payment is made.
- 03/26/2009 Made scheduler daily notes bold and red.
- 03/26/2009 Added confirmed status to Appt Status report.
- 03/26/2009 added dx description to drop list in add item so that name of dx can be seen while adding charges
- 03/26/2009 Scheduler Archive.
- 09/03/2009 Scheduler: Added lab status to screen (tootip and yellow display area)
- 03/26/2009 COLLECTIONS MODULE: Ability to print snap shot report.
- 03/26/2009 Added print date to documents.
- 03/26/2009 Add option to chart labels to show field headers or not.
- 03/26/2009 Increased patient document field size
- 03/26/2009 Appointment Confirmation: Added access patient notes from confirmation module so that they can notate if they left messages etc.
- 03/26/2009 Added ability to search for patient by first name in scheduler.
- 03/26/2009 Enhanced payment posting screen in batch posting area
- 03/26/2009 Account number now shows in the yellow preview area in the scheduler.
- 03/26/2009 Added Token to documents for patient total balance and ins total balance.

Revision History ALL

Version: 08.12.01

- * 12/18/2008 Ability to print triple receipt from scheduler. Right click appt.
- * 12/17/2008 DYMO - NEW DYMO receipt print option and ability to select DYMO default as receipt/excuse/appt slip printer.
- 12/17/2008 Added selection in extraction letter screen to allow you to select which billing party contact information appears on the letter.
- 12/17/2008 OCHART: Ability to print initial exam.
- 12/18/2008 Scanning - Scan multiple pages at a time using multipage scanner
- 12/17/2008 Revamp of imaging area to allow for drag and drop in to regions, photo groupings, auto import from drive or camera.

Version: 08.11.01

- 11/21/2008 COT's Ability to round up or down when creating a COT plan. Also added manual override option once plan is created so that you can modify due dates, amounts, payment dates and amounts. Finally option in COT to select anywhere from 1mth-12 months for plan cycles.
- 11/21/2008 Added report by hours format HH:MM and ability to an employee to print their own hours [select name on main screen, then go to view your hours.]
- 11/06/2008 add tokens for all phone#'s, work cell, home etc. both patient, billing parties and drs. Also add salutations to ALL name categories, patient, billing parties, payplan billing parties etc. Fixed dob format for ptinsdob.
- 11/21/2008 Ability to print paper receipts and appt slips/excuses to the DYMO printer, from triple receipt, walk out receipt and scheduler right click. Also, option to print to second spool using Twin Turbo Model.

- 11/21/2008 You can now add users in the security area without having to create a user in windows using a insert under General Settings, Admin, Security.
- 11/21/2008 New tokens for date format to accommodate european date formats as applicable; format changes based on regional date setting in Windows.

Version: 08.10.01

Revision History ALL

- * 10/02/2008 TIMECLOCK - New check in/out status box added to timecards so that times can be correct and clock in or out status can be corrected at the same time. Also added hour type: Holiday to the types list. and added Admin and employee notes to payroll reports.

Version: 08.09.01

- * 09/13/2008 Additional exam fields added to Initial Exam Screen. Also added Ceph Analysis to charting menu at the top. New graphics added to the tooth chart via right mouse click and ability to switch between primary and permanent teeth; which also modifies the graphic.
- * 09/13/2008 Ability to remove elastic but not delete it so that you can view the elastic positions historically. Click tooth & view "image list for selected tooth"; use new button to "remove elastic". Now use date drop list next to the tooth graphic to select a date and view elastics movement historically.
- 09/13/2008 SCHED/PATIENT: Update scheduled appts with name changes.
- 09/13/2008 Report: Ability to query patients by Medical Conditions/Allergies. Access this option in Reports, Patient Reports, Recall and Contact Module, all patient then by Medical Condition and Allergy.
- 09/13/2008 Added payplan coupon alignment option.
- 09/13/2008 Image edit will now default to external program for editing. just needs to be the default program for the file type.

Version: 08.06.01

- 06/19/2008 Added tokens for salutation for primary and sec billing parties and patient
- 06/19/2008 TOKENS: Request for Prim Ins Name and Prim Ins Type for Chart labels.
- 06/19/2008 DOCUMENTS: Added spellcheck to documents. Requires MS Word. Also does editing for grammar.
- 06/19/2008 PTFLOW: when you right click patient in waiting room and seat them in alternate chair/resource automatically.
- 06/19/2008 LEDGERS: Added running balance column to patient and billing party ledger.
- 06/19/2008 Upgraded recall area to Recall and Contact Module. This area can now be used to contact your patients by mail, and email with automated appt call confirmation or recalls to follow in the next release. Create custom messages with data tokens, like patient name etc. to contact your patients.

Revision History ALL

06/19/2008 PTFLOW: Added Ready4Dr toggle.

Version: 08.04.01

- * 04/25/2008 LAB/XRAY - Ability to store labs with contact information so that they can be selected in the lab/xray tracking area. Include Name, Address, phone, fax etc and notes field
- * 04/25/2008 Automated Credit card processing added. Contact support for more details.
- 04/25/2008 STATEMENTS: Added invoice number option to statements.
- 04/25/2008 POST PAYMENTS: Ability to post a patient payment to multiple visits and or single payment to multiple billing parties. On main screen under Add Visit, Change Visit options in the task bar on the left.
- 04/25/2008 TIMECLOCK: Ability to allow employees to modify their times. then at payroll admin needs to review and approve in report before finalizing payroll. Set at maintain info level for each employee. You can run a Time Override Report prior to payroll to verify punches.
- 04/25/2008 DRUG Log: Ability to set prescriptions as discontinued.
- 04/25/2008 PRESCRIPTIONS: 1. Ability to store database of pharmacies and select for prescriptions. 2. Ability to print entire drug database. 3. Ability to print patients prescription history.
- 04/25/2008 STATEMENTS: Format options added to statements. Print with running balances, oldest to newest transaction or visa versa.
- 04/25/2008 PATIENT FLOW: Added dynamic sizing of boxes, added appt description to boxes. Also added "Ready4Dr" status which changes the color in chair to 'green'. Added simple way to seat patient in any chair from the Waiting room area with right click.

Version: 08.03.02

- * 04/02/2008 SCHEDULER: Ability to close out entire day with right click. Make start and end time the same and date will display closed. Also if you leave the start and end time in the Admin Scheduler setup area blank it will display as closed.
- 04/02/2008 ORTHO CHART: Add treatment plan to orthochart main screen.
- 04/02/2008 Patient History added to Actions for highlighted patient. To create history form go to General Settings Admin, Patient History.

Revision History ALL

Version: 08.03.01

- * 03/12/2008 SCHED: Create Future appt report for selected patient. Run from Easyview. Reminder: Easyview can also be launched from within the patient scheduler. Right click the patient and display Easyview.
- * 03/12/2008 ORTHO CHART: Added Referral letters and Extraction Letters with patient photo and letterhead options.
- 03/12/2008 Dentical - New form for DentiCAL required by 04/01/2008. Claims and TAR form are now combo form.
- 03/12/2008 PATIENT INFO: Printout of current patient information with column for the patient to put in any changes. RUNs from Easyview, Patient Info Sheet.
- 03/12/2008 SCHEDULER: Add option to print reminders and Daily note on the scheduler printout. See option on Appts All Resources printout screen.
- 03/12/2008 SCHEDULER: Saves last view for waiting list vs. patient flow so when they open the program it already defaults to that tab.
- 03/12/2008 REPORT: Added new sort order to proc frequency report to sort by patient name. This way you can run a group of procs and track individual patient progress. Reports, Admin Reports, Procedure Frequency.

Version: 08.02.01

- * 02/08/2008 NEW COLLECTIONS MODULE: Access from Billing on Main screen. The collections module allows you to work all your outstanding accounts from one simple screen. All contact information, balances and notes; with contact log and report capability. It's the perfect solution for all your collection needs.
- * 02/08/2008 DOCUMENTS: Added ability to create letterhead for all your documents. General Settings, Admin, Chart Labels and Letterhead.
- 02/08/2008 REPORT: Report of payments by date of service. Shows payment applied to specific dates of service regardless of payment date. Reports, Financial Reports, Charge and Payment Summary Report and Annual Summary Report. Both export to excel.
- 02/08/2008 VISIT SCREEN: Added patient billing party info to patient information preview pane in the upper left of the visit screen. also added deductible, co-pay and maximum allowable information for at a glance access.
- 02/08/2008 STATEMENTS: Added date range to statements. Now you can print only statements due between to dates to capture overdue balances only OR run statements for only balances coming due at a future date.
- 02/08/2008 SCHEDULER: Added ability to launch ortho chart from right click in scheduler.

Revision History ALL

- 02/08/2008 REPORTS: Payments Due from Payment Plan Report - added YES/NO mark to report for patients/payments that are authorized for credit card payments. Now report can be run for all due and you can process accordingly.
- 02/08/2008 MAIN SCREEN DISPLAY: Next appt previews on main screen even if appt is today. However if appointment time has past it will not show and then next appt will show in it's place.
- 02/08/2008 SCHEDULER: List of patients in alpha order who are due in for a scheduled day to help when pulling charts etc. Scheduler Reports, Current Days Appointments, Appt Daysheet. Added option to print this report in alphabetical order.
- 02/08/2008 RECALL REPORT: Added next appt date to recall report printout.
- 02/08/2008 SCHEDULER: Jump to specific date will save the last jump to setting.
- 02/08/2008 SCHEDULE: History added and status report. We will track all status changes to the appointments and when you right click on patient and set to no show or cancel you can move it to the waiting list for followup. See Report, Appointment Status History.
- 02/08/2008 SCANNED IMAGES: Increase size of image previews and when you save scanned images you can now title them. Titles will appear under each image.
- 02/08/2008 VISIT SCREEN: Patient INformation Preview - Display Max Allowable, co pays, ded etc on visit patient info preview upper left.
- 02/08/2008 SCHOOL/WORK EXCUSE: Option to put appt duration or not on appt excuse both on the DYMO in patient sched and the triple receipt. General Settings, Administration, Messages. Check box under School Excuse Message to supress duration.
- 02/08/2008 SCHEDULER: Report by date entered. Records all appointments made on a particular day.
- 02/08/2008 ORTHO CHART: Instant Messaging added inside Ortho Chart Notes. Enter next appt information and select the person you wish to send the message to. When you click OK a message with be sent to that computer with the patients name and appointment information.
- 02/08/2008 COT CLAIMS: When set to quarterly bring up prev mths of the quarter not going forward. i.e. when you run claims for COT's for Feb the quarterly ones due should pull in Dec/Jan/Feb [2006 ADA form ONLY]
- 02/08/2008 REPORT: Ability to select multiple statuses in Patient Report, Patient Status Report.
- 02/08/2008 SCHEDULER: Added appt Date and Time to the top yellow appt preview area for the highlighted appointment.

Revision History ALL

Version: 08.01.01

- * 01/04/2008 DOCUMENTS: Ability to add photos to individual patient letters. When adding document position your cursor in the letter and click the camera on the right to access this patients photos and select the photo you want for the letter.
- * 01/11/2008 EMAIL: Launch email program & send emails to your patients directly from the main screen and scheduler. Main Screen: Select patient & click 'Actions for Highlighted Patient' upper right of main screen, then email. Scheduler: Right click on patients appt and select email. Sends appt information.
- * 01/04/2008 Visit Statuses added to allow you to supress certain charges from statements and or reports. Access from visit screen, right hand side in blue area under Advanced.
- * 01/04/2008 PATIENT CHECKIN: Enhanced patient checkin module for in the lobby, works with touch screen or keyboard/mouse setup. Confirms patient has arrived and checks them in to the patient flow automatically.
- * 01/04/2008 STATEMENTS: Ability to add customizable statement messages by aging criteria. Access via Billing, Statements and look for the Aging Statement Messages tab at the bottom right.
- * 01/04/2008 ALERTS: Added alerts which will come up when scheduling an appt. Alerts have been combined in the Medical Conditions and allergies area in patient info, easyview and actions for highlighted patient.
- * 01/04/2008 Interoffice Messaging between users/stations. Launch from File on the main screen, then select Instant Messenger Program. To set it to automatically open when the program is open, go to General Settings, Admin and check the box Run Instant Messenger Program
- 01/04/2008 VISTADENT: Now pulling in salutation from both patient info and billing party info.
- 01/04/2008 PHOTOS: Ability to enter a date for the composite instead of having it print the date it was printed. Will prefill with last photo date which can be changed if necessary.
- 01/08/2008 Introducing PerfectByte Ortho Charting. Access from Easyview, or Actions for highlighted Patient on the main screen. See updated help for more information.
- 01/04/2008 Reports, Admin, Resp Party Labels. Added filter by patient status, allow ability to select multiple statuses.
- 01/04/2008 DentiCAL - Supress SS# from printing in field 2. There is also a completely new Dentical form but it is not effective until April 1st 2008. For now they are only requiring the SS# be supressed and is effective immediately.
- 01/04/2008 Added referring physician name to referring phy freq report, patients by refer and graph.
- 01/04/2008 Added "Resource" column to Waiting room section of Patient Flow. Also increased size of patient flow screen.

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- 01/04/2008 ORTHO CHART: Added Extraction Letter click Print, Extraction Letter in the upper left corner of the Ortho Chart Screen.
- 01/04/2008 SCHEDULER: Variable length scheduler printout compensates for number of columns and patient names. Also added selection to print notes on Appt All Resources Printout.
- 01/04/2008 PATIENT LEDGER: Added date range and family ledger. Run from Actions for Highlighted Patient then select Print - Ledger you will be prompted for a date range. You can also print an individual patients ledger or a family ledger.
- 01/04/2008 Options added for Dx, Drs TIN#, and NPI# on statements and walk out receipts. Option added to General Settings, Administration, Statements/Receipts
- 01/04/2008 ORTHO CHART: Added xray log and right click actions for VTO, IPR and other conditions.
- 01/04/2008 UTILITIES: Added ability to increase or decrease fees by Fee Schedule based on RVU, Percentage or flat rate. Accessed through utilities.

Version: 07.11.01

- * 11/21/2007 SCHEDULER: Added the ability to have multiple locations in the scheduler. Select the Location from the menu at the top of the scheduler. You can also now filter the scheduler view and print by Doctor.
- 11/21/2007 SCHEDULER: Added daily open close time template capability. Simply right click on any day in the calendar above and access Modify Open Close Time.
- 11/21/2007 TREATMENT NOTES: Increase field sizes to 2000 characters.
- 11/21/2007 SCHEDULER: Added the ability to keep waiting list for patients so that when someone cancels or reschedules the staff can immediately reference the waiting list queue and schedule one of those patients.
- 11/21/2007 Audit tracking added to the program. Tracks Insert, change and deletions by user.
- 11/21/2007 SCHEDULER: Added daily note to scheduler for notices to the staff etc. Simply right click on any day in the calendar above and access Add/Modify Note.

Version: 07.10.01

- 10/22/2007 Treatment Plan: Ability to mark procedure as rendered without having to add it to a visit. Need to be able to change rendered date as well if necessary.
- 10/22/2007 Treatment Plan: Ability to put procedures in any order and to re-order them as desired.

Revision History ALL

- 10/22/2007 Treatment Plan: Ability to select a treating doc at the treatment plan level for group practices.
- 10/22/2007 Add column for Appt Status in "Future Appt" view in easyview
- 10/22/2007 Treatment Plan: Add plan name to the treatment plan printout. Also add practice/dr name, address, phone etc. See example faxed.
- 10/22/2007 Treatment Plan: Split patient and ins amount for each proc according to fee schedule and co-pay info.
- 10/22/2007 Treatment Plan: Ability to add procedures by group to treatment plan.
- 10/22/2007 Treatment Plan: Added option for Signature and Date at the footer of the treatment plan printout. Some docs have the patients sign the treatment plan once it is agreed upon.
- 10/22/2007 Treatment Notes: request for more room to type in Rx area.
- 10/22/2007 Treatment Plan: The default statement "Amounts are merely an estimate..." needs to be user defined. Also insure that area for Treatment Plan message in default area is at least 1000 char. Added a default message and one specific to the plan and patient.
- 10/22/2007 Lab/Xray tracking aka. Pathology/Radiology tracking. They will need to be able to access/report this by appt date. docs ck in advance to make sure all lab has arrived for a given day. Otherwise appts are rescheduled. and from easyview?

Version: 07.09.01

- * 09/18/2007 DEXIS interface added
- * 09/18/2007 Reverse Payment Feature: Access this option by highlighting the payment and clicking Reverse Payment for bad checks etc.
- 09/18/2007 NEW Report: Adjustment report. detailed and summary by adjustment type. NOTE: Run Update Adjustment Flag utility if you have adjustment codes created in your procedure list. See instructions in update.
- 09/18/2007 Labels: Add option on main screen for patient chart label. Access by clicking "Actions for highlighted patient" go to print and select the label option desired. Also option to customize the chart label added to General Settings, Admin, Advanced.
- 09/18/2007 Labels: Added primary billing party labels to main screen. Access by clicking "Actions for highlighted patient" go to print and select the label option desired.
- 09/18/2007 Added a printer dialog to document printing so that you can direct your letters to an alternate printer.

Revision History ALL

- 09/18/2007 Patient Information: Field for patient nickname and a look up tab for nickname from main screen.
- 09/18/2007 Scheduler: Report by appt description or CDT code, select date range and selected types of appt or all, subtotal by appt description, total number of each. Access in scheduler, Reports, Appts by Description.
- 09/18/2007 Employee Timeclock - CA overtime laws say they get paid OT if over 8 hours in a day or if they work a day that is outside the normal work schedule.
- 09/18/2007 Report Enhancement: Procedure Frequency Report - ability to add codes by procedure groups.
- 09/18/2007 New Report: Financial Reports, Month Year to Date charges, payments and adjustments.
- 04/24/2007 Report Enhancement: Added selection by other referral source, such as direct mailer, yellow pages etc. for tracking purposes. Located in Reports, Admin Reports, Patients by Referring Sources. Also shows referrals by patients in your practice.
- 09/18/2007 ADA Forms: Added option to print dr name in block 53 instead of SOF.

Version: 07.08.01

- * 08/29/2007 Added ability to print individual patient statement from "Actions for highlighted patient". Also added the ability to type in a note to print on the statement for individual patients.
- 08/29/2007 Add billing cycles to patient accounts.
- 08/29/2007 Add statement log to each visit in at a glance area.
- 08/29/2007 Added next appt to statements.
- 08/29/2007 Birthday report - add filter to skip certain statuses. Like "inactive" patient.
- 08/29/2007 Ability to mark a patient record so that they do not receive a statement.
- 08/29/2007 Please show account numbers on statements and receipts.
- 08/29/2007 Enhanced graphics on tooth charting and added ability to print chart.
- 08/29/2007 Option to print balance forward and any transactions since last statement.
- 08/29/2007 Aging on patient statement 30-60-90
- 08/29/2007 add option for block 29 of the CMS-1500 form to print payments, payments + adjustments or leave blank.
- 08/29/2007 Subtotal by patient on multi family statements

Revision History ALL

08/29/2007 If you enter -.01 or any negative amt in minimum balance you should get zero balance statements and/or statements with credit balances in that amt.

Version: 07.07.01

- * 07/17/2007 Ability to add late fees to visits and payment plans in a batch. Click Billing, then drop down to Post Late Fees. Select %, flat rate or both; and view late fees in queue before processing.

Version: 07.06.02

06/28/2007 Add master list area for employers/school info with field for notes. Need to be able to select for patient, ins and billing party. this was a 90 day contingent item that is coming due.

06/28/2007 Ability to make adjustments at the payment plan level.

Version: 07.05.01

- * 05/22/2007 VixWin Interface added.
- 05/22/2007 Add default option to allow doctors to decide whether or not to add the referring doc info from the patient on the visit.
- 05/22/2007 Default visit and easyview notes to the note type that was last accessed.
- 05/22/2007 VISTADENT - Referring Dr. converting as DR. please fix to be upper/lower case.
- 05/22/2007 Add Supplemental fields for CMS and ADA form for prov# based on particular ins companies.
- 05/22/2007 Batch Posting of Insurance Checks - ability to adjust, transfer from insurance to patient, etc.
- 05/22/2007 credit card graphic printing on walk out receipt needs ability to supress for offices not accept credit cards. Patients calling office and sending credit card information and they cannot process.

Version: 07.04.01

04/24/2007 Patient flow can now be opened at the same time as the scheduler.

04/24/2007 Printer dialog added to scheduler printout.

Revision History ALL

04/24/2007 FIXED: Now you have the ability to post payments to -0- balances and credit balances as well as transfer credit balances.

Version: 07.03.02

04/03/2007 Complete

04/03/2007 Problem Fixed

04/03/2007 Vistadent interface, error launching from easyview through the scheduler.

04/03/2007 Vistadent interface. We're passing the state in UPPER/lower case so NC comes over as Nc.

03/30/2007 Additional fields added as well as word processor formatting for customizing the look of your prescriptions.

04/03/2007 Printer Dialog added to Photo Composite printing.

04/03/2007 Format corrected.

03/30/2007 We recommend external hard drive, CD or flash drive, copy/paste backup as your replacement method.