Practice-Web Version 22.3

Major Changes

Quickly Receive Claims and Preauthorizations as No Payment and Zero Out Write-offs.

- Use the Outstanding Insurance Report to clean up no payment claims.
- Adjustment Picker filters out adjustments attached to Dynamic Payment Plans.

Automatically Zero Out Write-off Estimates when annual max, age limitation, or frequency limitation is met.

- Preference to zero out write-offs for insurance estimates when annual max is met.
- Preference to zero out write-offs when age or frequency limitation is met.

Changes by Category

Account Module

- Preference to automatically receive claims with no assignment of benefits.

Appointments

- Appointment audit trail entry when procedures are moved to another appointment.
- Option to print appointments in landscape.
- Added icon in Appointment Views when family has a balance.
- Added Net Production to Appointment Bubble
- Default a tooth number on specific Appt Proc Quick Add procedure.
- Appointment Module Preference, *Week View start day*.
- Quickly jump to specified date on Appointments calendar.

Added Orthodontic Tooth Graphics

- Added Ortho tab to view and chart orthodontic treatment.
- Add custom ortho prescriptions for easier charting.
- Add custom ortho hardware for ortho chart.

Enhancements to Patient Information

- Option to note pronouns in Edit Patient Information window.
- Gender options for *Other*.

Chart Module

- Ortho chart opens in read-only mode for users without edit permission.
- Removed Ortho Chart Locking notice.

Imaging Module

- Setting for thumbnails in Imaging Module is now separate from thumbnails in Chart Module.
- Default image category for new images taken via video.

- Default measurement scale for new images.
- Mount setting to default to Adj Mode after taking acquiring images.
- Mount setting to automatically flip images upon acquire.
- Mount setting to disable text background color.

Miscellaneous

- Referred To referral slips can populate with any selected provider.
- Allow providers to electronically sign forms
- Encrypted QuickBooks Online credentials.
- New output text field for LabCaseNum.
- Insurance Verification list tab to assign medicaid plans.
- Renamed Previous Versions window to Update History.
- Option to use report server for wiki search.
- Print button added to Chart Module toolbar for progress notes.
- Removed ability for new users to store images in the database.

Practice-Web Version 22.1

Major Changes

Create perio charts with default probe measurements

- Quickly create a default perio chart. Insert the default when charting for a patient, then make changes to the patient as needed.

Changes by Category

Account Module

- Account Module Preference to prevent changes to existing transactions.
- New Allocations preference: *Adjustments offset each other*.
- Preference to remove Do Nothing option from Secondary Claim prompt.

Family Module

- Popups default Level to Family.
- Dropping a discount plan allows user to save subscriber note to a commlog.
- Patient-level overrides for Frequency Limitations.

Security

- New permission for *Carrier Edit*.
- Log Source added to Audit Trail to view entries made by automations.
- Audit Trail permission for *SecurityGlobal*.
- Audit trail entry when deleting a mount.

Manage Module

- Option to output clinic number on electronic billing files.
- Option for Task Search to include task attachments.
- Determine which data to delete in Remove Old Data tool.
- Claims Waiting to Send displays if claim is primary or secondary.
- New billing option, *Exclude if insurance pending __ days or less*.
- Time clock event checkbox when working from home. TimeCard
- Determine where accounting attachments are saved to.
- Archiving a task list will automatically unsubscribe users.

Miscellaneous

- Determine maximum number of automatic reminders for recall.
- Delete or acknowledge multiple alerts at once.
- Option to exclude other coverage on primary claims.
- Practice-Web Cloud allows using PDF Toolbar in Imaging Module.
- Clear Query Feed content on Query Monitor.
- Added Bridge to Medit Link.
- Service Manager includes MySQL.
- Sched Patient and Sched Family buttons in Recall List now jump to recall due date.
- Simplified adding additional forms to a Web Form URL.

- Copy new fields to language translations on sheets.
- Label setting in sheets moved to Sheet Defaults.
- *Go To Patient* option added to User Queries.
- Included warning when hiding an appointment field or patient field that is in use.
- Added Imaging Module preference for Apteryx XV Web users.
- Clinic level override for email address alias.

Practice-Web Version 21.4

Major Changes

New options when printing appointments

- Print in full color, partial color, or black and white.

Enter insurance information when scheduling appointments via Web Sched

- Available for Web Sched New Patient and Web Sched Existing Patient.
- Select which carriers to allow or not allow.
- Patients enter insurance information when scheduling.

Changes by Category

Account Module

- Delete payment plan charges from the Dynamic Payment Plan window.
- Preference to run a limited income transfer on overpaid procedures attached to a received claim.
- Users must select a status when using Custom Claim Tracking.
- Disallow negative adjustments on dynamic payment plans.

Appointments Module

- Reorder appointment field defs.
- Warn users when deleting the last procedure from an appointment.

Chart Module

- Preview an exam sheet.
- New commlog modes for Phone and Text.

Imaging Module

- Preference to set default import folder.
- Freehand drawing with pen, point to point lines, edit, change color, etc.
- Edit existing mounts.
- Determine where an image will display on screen.
- Mounts can now contain generated text.

- Unmounted area for retakes.
- Display photos as thumbnails.
- Rotate images by any number of degrees.

Manage Module

- Add attachments to tasks.
- ADP Run supports semi-monthly pay periods.
- Manage Module preference to hide providers without a DEA number when generating an Rx sheet.
- Restore functionality updated to check for which database management system is in use.
- ADP Run uses PayrollID instead of EmployeeNum.
- Filing Code filter for the Billing List.
- Printed ERAs display column for Claim Adjustment Reason Codes.
- Display validation warning in Send Claims window when carrier does not support attachments.
- Attach claims to ERAs when they are imported.

Reports

- Added additional options for viewing query results.
- Added clarification on reports that hidden clinics are included when All is selected.
- Right-click options added to User Queries.
- Added a new checkbox to Insurance Overpaid report that filters overpaid procedures that do not have an insurance payment or write-off.
- Added a disclaimer to Insurance Overpaid Report.

Security

- Security permission for adding or editing definitions.
- Security permission to merge prescriptions.
- Security permission for Text Message View.
- Security permission for Text Message Send.
- Security permission for updating Practice-Web.
- Security permission for determining which adjustments a user can add to an account.
- Audit trail entry when automation toggles the *Appointment scheduling is restricted* checkbox.

Miscellaneous

- Tool to merge prescriptions.
- Auto Ortho preference to stop treatment months when debond code is completed.
- Add favorite queries to Advertising - Select Patients.
- Family Balancer Tool option for FIFO transfer.
- Family Balancer tool for single family.
- Mark procedures as Do not bill insurance by insurance plan.
- New [UserName] replacement tag for program links.
- Plug-ins must be whitelisted to work within Practice-Web.
- Allow users without the *Ins Plan Edit* permission to request electronic benefits.
- Added Ai-Dental program bridge.
- Option to reset Zoom settings on another workstation.
- Wiki search enhanced to preferentially disable find-as-you-type behavior.

- Age restriction added to CareCredit Batch QuickScreen.
- Added Output Text Field *TermsAndConditions* to Payment Plan Sheet.
- Gmail users can determine which emails to download to the Email Inbox.
- Enhancements to DentalXChange Attachment Tool snipping feature.
- Queries allow user to copy all data from selected rows in a tab-delimited format.

Practice-Web Version 21.3

Major Changes

Pay Periods: Option to generate pay periods on a semi-monthly basis.

Practice Setup: Billing and Pay To Phone numbers added to send on claims.

Advertising Postcards Feature

- Set up office with a Postcard Account.
- Design postcards and send them to existing or prospective patients.
- Select a list of patients to send postcard advertisements to or purchase a mailing list.

Changes by Category

Account Module

- Edit Payment Split window defaults to the current patient.
- Add ability to include payment plan charges on limited statements.
- Added Provider and Clinic columns to the Adjustment Picker window.
- Review multiple adjustments before adding them to the account.
- Statement button sets the start date from billing defaults when printing the statement.
- Removed *(overpayment)* from Refund *(overpayment)* menu item.
- Update repeating charges for all patients or patients in a superfamily.
- Moved Allocation Setup to Account menu.
- Payment Plans consider *Adjustment Create* permission.
- Updated terminology in the Production Tab of Dynamic Payment Plans.

Chart Module

- Warn or block a user from completing a procedure in a hidden category.
- DoseSpot no longer requires practice or clinic fax number.
- New auto codes for dentures.
- New procedure buttons for dentures.
- Print Ortho Chart for a date range.
- Ortho Chart locks to prevent concurrency issues.
- Big Tooth Chart window title updated.

Imaging Module

- Open multiple images in the Imaging Module at once.
- Add text to images.
- Add browse buttons to import folder fields.
- Added Twain option for ScanX phosphor plate.

Manage Module

- Tasks make notification sound on blocked tasks.
- Option to show hidden users in Task Search.
- Filter Transaction History by amount range.
- Automatic and semi-automatic processing of ERAs re-enabled.
- Report to track automatically processed ERAs.

Security

- Security permission to restrict access to adding or editing medications.
- Security permission for setting up high security program links.
- Security permission to restrict access to adding or editing allergies.
- Security permission to restrict access to adding or editing problems.
- Security permission to restrict access to the Edit Patient Information window.
- Audit Trail entry for editing patient credit card.
- *Adjustment Create* permission is required when adding discount to procedure.
- Updated permission name from Daily Payments - View All Providers to Daily Reports - View All Providers.

Tools

- Wiki search allows main pages to show at top of results.
- Wiki considers keywords when adding internal link.
- Allow user to edit wiki page if it is broken.
- Tool to merge billing types.
- New database maintenance method for *DiscountPlanSubWithInvalidDiscountPlanNum*.
- New database maintenance method for *ProviderMissingFromDB*.

Miscellaneous

- Fixed spelling in XVWeb bridge.
- Print Electronic Eligibility and Benefits.
- New keyboard shortcut added to open Select Patient window.
- Service to automate statement generation.
- Option to update appointment type color on existing future appointments.
- Sheet level setting to control auto-saving of forms to Imaging Module.
- Enhance the Dexis Integrator bridge to have an option for using the File Interface protocol.
- Added SteriSimple Bridge. e
- MariaDB copyright information added to About window.
- Add color to rectangles on sheets.
- Patient Portion Uncollected report is now non-modal. Patient Portion Uncollected Report
- Bridge to Pixel by Digital Doc.
- Add DownLocal growth behavior to Insurance Benefit grid in Treatment Plan Sheet.
- Block MySQL 5.5 users from Unearned Allocation report.
- Copy Email and Phone fields from the selected patient when adding new family member.
- Medication list exports as JSON instead of Tab-Delimited file.
- Updated DLL for Dr Ceph bridge.
- Warning when user attempts to cancel aging when running certain tools.
- Added Weekend Rate 3 in Time Card Rules. TimeCard, Time Card Setup
- Added missing fields to the internal form 1500_02_12 claim form.
- Replication service can be used with One Way Replication.
- Hide MariaDB sys and session users from MySQL Manager.
- Merge Patients window, changed *Patient ID* label to *Patient Number*.
- When using RDP, the client name is used as the computer name in various places.
- Insurance Verify list option to verify benefits separate from eligibility.