



# Management



Dolphin Management is a full-featured orthodontic practice management system that enables you to efficiently manage and organize your practice flow, especially if you have high-volume, multiple locations and multiple practitioners. With consistent feature upgrades and improvements, Dolphin Management combines an easy-to-use interface with powerful features.



# Choosing Dolphin Management

## Enterprise Architecture.

Dolphin Management runs on the latest and most universal technologies available today. Built on a solid foundation of Microsoft's® .NET application development platform and the enterprise-class database SQL Server, Dolphin Management is capable of securely connecting data and images from multiple offices with virtually unlimited capacity and optimal performance for your practice. Features multiple monitor support.

## Flexibility.

Dolphin Management is installed with your practice's unique processes in mind, allowing you to choose the options you want, rather than having to accept an "off-the-shelf" configuration. Customize reports, treatment cards, scheduling, and more. Dolphin is the only system that allows this degree of flexibility, so you're always in control.

## Integrated Mobile Applications.

The Dolphin Mobile app lets you securely access your Dolphin system via the internet from any iPhone®, iPad®, iPad touch® and most Android™ devices. The Dolphin MyOrthodontist app for your patients helps them stay connected to your practice and stay involved in their treatment.

## Multiple-Office Remote Connectivity.

Dolphin Management runs smoothly under thin-client environments such as Microsoft® Windows Terminal Services and Citrix® MetaFrame, enabling seamless multiple-office access with minimal computer hardware investment. No matter how many locations you have, Dolphin supports your practice with the same outstanding performance.

## Run Dolphin Management in the Cloud.

Dolphin Cloud Subscription offers the option to run all your Dolphin software without the need of a physical server in your office. Say goodbye to costly file server purchases and maintenance fees. Automatic updates mean you'll always run the latest Dolphin software. We even perform the necessary, regular data backups for you. Cloud Subscription is available in a variety of packages to accommodate any size practice.

## Intuitive Graphical User Interface.

All program functions can be easily accessed from the main graphic icon bar. All interfaces conform to the conventions of Microsoft Windows®, allowing users to easily navigate the program, while minimizing training time.

## Training/Installation.

We utilize a structured, detailed process to transition your practice to Dolphin. Our technicians assist your Information Technology (IT) professionals in properly configuring network and computer needs. We conduct in-depth remote pre-training with your staff and verify converted data. The implementation process continues with an intensive on-site session by a licensed Dolphin trainer. Then, a specialist is assigned to assist your practice to ensure a seamless transition. Additional follow-up visits are available.

## Dolphin Service Club



## SMS Messaging Center.

Enjoy real-time, 2-way patient communication via SMS using a "threading" interface that allows you to simultaneously view multiple threads. Set up SMS groups of patients, billing parties, and employees. All incoming message notifications are shown in real-time.

## Existing Database Conversion.

We faithfully translate your existing practice data into Dolphin's data platform. This data conversion process includes full patient demographics, referral information, scheduling calendar (past and future appointments are preserved), patient financial data, insurance details and treatment card entries. Most systems under UNIX®, MS-DOS® and Windows® platforms can be converted. Detailed documentation regarding the conversion of your existing system is available.

## Automatic Software Updates.

Dolphin Management updates are delivered securely and automatically via the Internet (broadband is required), so your office will always be running the latest Dolphin software.

## Perfect Companion to Dolphin Imaging and Other Industry Software.

Dolphin Management displays the patient's image throughout the program. You can also directly access the full set of the patient's photographic records. Dolphin Management also integrates with industry-standard programs and services such as T.LINK™, OrthoSesame™, Tele-A-Patient™, HouseCalls™, OrthoBanc, SureSmile®, Vanco, ZACC, Emdeon Insurance Claims and Electronic Statements, X-Charge™, Demand Force, Gaidge and Practice Genius, completing and connecting all your records and technology solutions.

## Before a Patient Visit...

### Fingerprint Security.

Dolphin integrates the latest fingerprint biometric technology throughout the system, allowing designated personnel to conveniently and securely access your practice's most sensitive information and functions. Control functions such as patient account creation, financial modification or appointment scheduling. Operations performed are securely and automatically logged to allow review and examination. You can also optionally enable fingerprint security for employee clock in/out, system sign-on, appointment scheduling, financial and treatment card functions.

### Location Based Security.

Optionally restrict employee access to specific locations. This provides higher security and access control for multiple location practices or large institutions.

### New Patient Online Forms & Online Scheduling.

Embed New Patient Forms on your practice web site for potential patients to fill out and even schedule an appointment that is added in real-time onto your practice schedule.



### Share Forms.

Create and share Super Questionnaires—such as Medical History forms—via AnywhereDolphin, allowing this information to be completed prior to the patient's first visit. Or have patients complete their Medical History form via Dolphin Mobile when they first arrive at the office.

### Employee Time Clock.

A completely integrated employee sign-in/sign-out module that tracks employee working hours. Specialized “customized events” track time spent on specific employees activities, including “Out of office – Making bank deposit,” “Moved from chair-side to front desk,” and “Began working in lab,” etc.

### Patient Database.

Complete patient demographic data is stored and organized, including detailed personal information, special keywords, unlimited billing parties, employee information, complex insurance plans, flexible contracts and payment plans, appointment history, referral tracking and treatment card entries. Easily create custom database fields for items like school/camp information.

### Scheduling.

Patient appointments are easily managed with custom time increments (2-minute to 60-minute), unlimited chairs/columns and unlimited office locations. You can also design schedule templates for each day and location, featuring color-coded appointment types, doctor time tracking, printing of appointment tickets and school excuses, as well as week-at-a-glance views. Scheduling also supports drag-and-drop flexibility!

### Sooner if Possible.

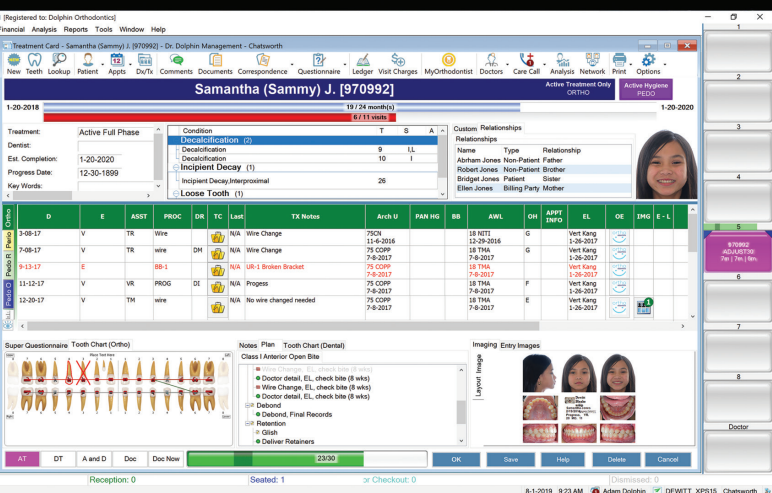
“Sooner if Possible” function alerts you to appointments hoping for an earlier time slot, displaying them in a list that is searchable and sortable by any criteria. A “Search and Reschedule” option automatically loads all relevant data for the appointment being rescheduled. Also, select any open Reservation and quickly find “Sooner if Possible” appointments to fill the available time slot.

### Schedule Search.

Easily search your schedule for procedures based on doctor time, location, day of the week, morning/afternoons. The search results are automatically sorted by day and color coded to low, medium and high patient loads.

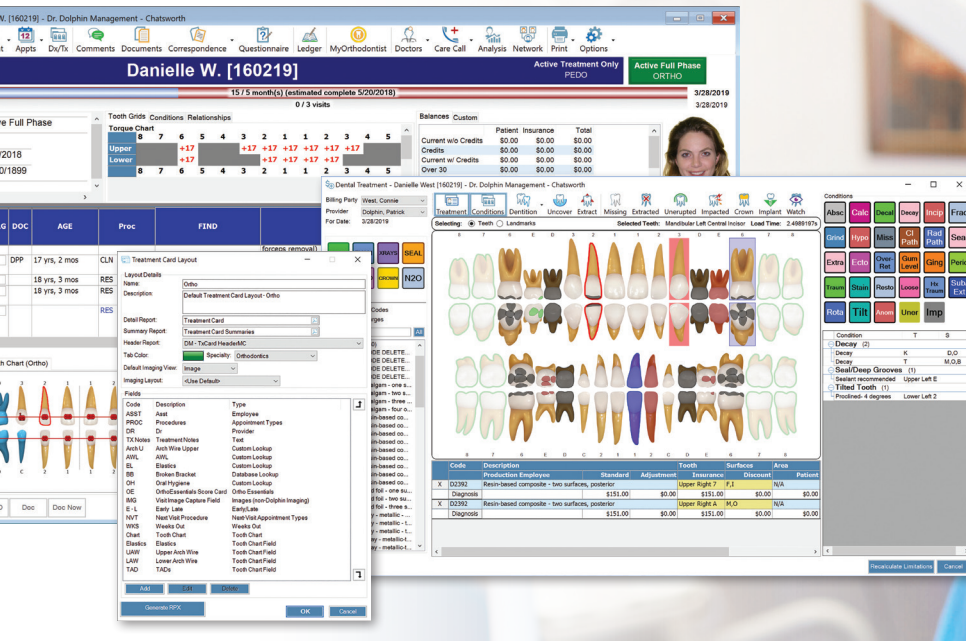
### Appointment Reminders (SMS/Email/Telephone).

Now you can easily send appointment reminders to your patients via email or SMS, or deliver reminders personally with Phone Reminders. Define a preferred Appointment Reminder Method for each patient. You can also customize the message to be sent for each reminder type using specific tokens on this screen.





## During a Patient Visit...



### Patient Check-in.

Greet your patients with personalized PowerPoint® messages, using images, animation and graphics. Patients have the option of signing in by fingerprint scan or by typing in their names.

### Patient GPS™.

This unique feature allows you to accurately monitor patient flow in the office, including which and how many patients are scheduled, have signed in, are waiting, have been seated and have completed their appointment. Early and late arrival of patients is automatically indicated, while waiting times, reminders and time spent on procedures are accurately tracked. This is one great tool for improving office efficiency and productivity on a daily basis.

### Electronic Signature.

Take one step further toward a paperless practice! Capture signatures on the fly in real time, or save captured signatures to your Dolphin program for easy, on-the-spot retrieval by any staff member with rights. Dolphin Management supports the Topaz Systems SignatureGem LCD line model family T-L462.

### Operatory Light Bar.

A powerful tool for managing and optimizing operatory flow in a busy practice. The Operatory Light Bar precisely locates any patient, doctor or staff member and displays the location of the patient, their treatment status, where the doctor is and should be going, and which staff person is performing what specific procedures.

### Treatment Card.

Efficiently and securely record detailed treatment visit activities and treatment plans. Features include touch-screen and Microsoft® XP Tablet PC compatibility, customized color cards for different treatment type/stages, multiple treatment card

layouts, quick selection of commonly used phrases for text fields, personalized band/elastic sizes, photographic and radiographic images (when used with Dolphin Imaging™), quick email and integrated scheduling. Quickly graph any column in Treatment Card, such as Oral Hygiene or Cooperation. Easily schedule multiple next-appointments directly from the Treatment Card.

### Enhanced Customized Tooth Chart.

Graphically enter items like bracket type with torque information, arch wire sizes, elastics, powerchains, TADs and annotations in the Enhanced Tooth Chart. Of course, it is customizable by the practice.

### Treatment Planning Documentation.

Customize individual treatment plans for your patients. Pick from predefined global treatment plans, or build a new plan for each patient. Treatment Plans include sequencing, number of visits, procedures, months between visits, internal visit notes, etc. Easily view treatment plans from the patient's treatment card. Plan progress is displayed in Treatment Card, allowing you to quickly monitor the course of each patient's treatment.

### Document Organizer.

Combines virtually all communications for your practice into one secure electronic file cabinet. Letters, emails, faxes, notes and forms can all be directly accessed from multiple locations, including associated patient, billing party, referral and insurance company records.

### Care Calls.

Quickly and easily schedule a Care Call for the patient to follow up. Care Calls can be scheduled for any date and are viewable by all staff and locations. Care Calls also nicely integrate with Dolphin Mobile.

## After a Patient Visit...

### Exam Questionnaire.

Customizable forms allow you to prepare comprehensive multiple-choice surveys for use during initial-, progress- and post-treatment patient exams. Layouts can be personalized to reflect individual preferences. Easily select with integrated Tooth Picker.

### Super Questionnaire.

Works across Dolphin Imaging, Dolphin Management, AnywhereDolphin and Dolphin Mobile. Features a distinct interface for staff and patient, so questionnaires and forms can be shared online with patients via AnywhereDolphin to fill out at home or on a mobile device; you can then access with Dolphin Mobile on your iPad. Answers can be mapped to the appropriate demographic field using the "Mapped Fields" feature. Data is securely stored in your Dolphin database, and accessible via Dolphin Letters, Patient Information, Patient Document History, Treatment Card, and other relevant screens within Dolphin.

### Exam Questionnaire integration with PowerPoint.

Easily build patient-customized PowerPoint Presentations based on the information entered in your Exam Questionnaires.

### Relationship Manager.

Easily link and display all patients, doctors, non-patients and employee relationships for a patient. Relationships can be set for patients, billing parties, professionals and employees. Create relationship groups for related parties. For example, create ABC Dental Group and link all doctors that work at ABC Dental Group.

### Patient Tracking.

Analyze detailed patient statistics based on treatment stages from initial contact and first scheduled appointment to completion of treatment. Review and track history by procedure, appointments, and letters. Answer questions such as, "Who has had records taken, but has not yet started treatment?"

### Correspondence.

Integrated with Microsoft Word® and the Dolphin Letter System, you can utilize powerful custom letter templates to address patients, billing parties, referrals, professionals, etc. Letters can be automatically queued from different operations: scheduling, treatment card, patient status changes, etc. Choose from a comprehensive library of letters, certificates, postcards, labels and reports.

### Comprehensive Financials.

Solidly designed, field-proven features: Charge/payment processing and collection tools. Create treatment/contract proposals, complex contracts, precise adjustments, family statements and balancing work sheets. Insightful financial reports that help discover inappropriate financial activity. Complete accurate end-of-day and end-of-month reporting. Integrates with credit management and accounts receivable services, including Emdeon Express Bill Electronic Statements, OrthoBanc®, and VANCO® Services. Integrates with X-Charge for automatic credit card processing.

### Payment Processing.

Integrated payment processing via OpenEdge and Breeze for instant, seamless collections both in-office and online via AnywhereDolphin and MyOrthodontist app for patients.

### Insurance.

Complete tracking and management of insurance activities. You can submit claims based on expected benefits, easily make adjustments, reconcile and track balances. It supports employer/individual plans, batch/individual forms, and printed and electronic claims processed through Emdeon.

### Archived Financial Reports.

Dolphin Management automatically archives in PDF format all standard end-of-day and end-of-month reports. Easily and securely access prior period financial reports. All financial reports are serialized for your protection.

### Referral Analysis.

Flexible, powerful tools help you extract valuable information relating to patient referral sources based on patients, practitioners and billing parties. Create detailed reports and graphs based on charges, contracts and treatment types. Answer questions such as, "Who referred the most patients to us last year?"

### Patient Analysis.

Accessed in the patient's Treatment Card, this feature displays key patient treatment information such as Visit Entry Count; Emergency Entry Count; Scheduled Appointment Count; No Show Appointment Count; Cancelled By Practice Count; Cancelled by Patient Count; Late Appointment Count; Patients Referred In; Progress Date; Deband Date; Total Scheduled Hours; and Total Actual Hours

### Practice Analysis.

This powerful and interactive feature provides vital practice statistics: treatment starts, production, charges, receipts, adjustments, status changes, new-patient-added and accounts receivable. Easily drill down from a summary view to itemized transactions of individual accounts.

### Light Bar and GPS Analysis Tool.

The new LightBar Analysis calculates the amount of time a patient was in each LightBar status for appointments in a given date range. The GPS Analysis calculates the amount of time a patient was in each GPS Status in a given date range. Filtering and grouping functions allow customized micro-analysis, plus LightBar Analysis includes a nifty Exclude Late Appts option which, when selected, will exclude from results those appointments that were late by the specified number of minutes. The GPS Analysis includes both an Exclude Early and Late Appts option.

### Doctor Time Analysis.

This new screen displays Planned Doctor vs. Average Doctor Time, broken down by Appointment Class or Type. You can search by Appointment Type, Class, Orthodontist and Location. Information is displayed in Scheduling Time Increments, and handy drill-down access takes you to the Appointment Detail.



### Schedule SMS Text Messages.

Send customized text messages for statuses and occasions such as Recall, New Patient, Retention—even Birthdays. Any list generated via a report or the Dolphin Interactive Report Tool can be sent a customized text. Use our integrated Scheduled Job Manager to schedule these to be sent out on a specific schedule.

### Schedule Statistics.

Display key schedule counts using with filtering by Date Range, Location, or Orthodontist. Group by Date, Location, Orthodontist, Appt Type or Class. Display counts by category such as Scheduled, Add Ins, No Show, Cancelled, Rescheduled, Dismissed, Unknown, Entered on Day, Cancelled on Day, Rescheduled on Day, Rescheduled To Day.

### Standard Reports.

Choose from a list of more than 80 predefined reports on financials, patient information, scheduling, treatment card and labels. Examples include end-of-day, receipts, transactions, production and practice summaries. For multiple-location practices, reports can be created and assigned by location, allowing for location customization.

### Dolphin Interactive Report Tool.

The same way Practice Analysis helps you view your practice, Interactive Report Tool collates all report data in a friendly grid format that you can manipulate onscreen. Select from over 500 data fields to create your own custom searches and reports. Add filters, rearrange the columns, or change the order of the fields to create a whole new view of your data! Quickly drill down to individual patient information (it is interactive!). Easily send letters, print labels or print the new customized information.

### Comprehensive Doctor Database.

A comprehensive doctor database allows you to track doctor; staff; contact history; referral history; and even link to their Facebook, Twitter and LinkedIn Pages!

## Dolphin Management - Specialty

The Dolphin Management - Specialty Module features newly designed enhancements for orthodontic and pediatric dental practices, including dedicated features for financials, scheduling, charting, treatment planning and insurance.

All new features work great in an orthodontic office, while also satisfying the needs of a pediatric dental practice.

### Financial:

- Insurance Coverage books
- Insurance Fee schedules
- Insurance benefit applied / remaining tracking
- Ability to handle insurances that coordinate benefits
- Employer plan changes to support dental
- Policy Benefit summary to support dental
- Patient dental location / provider tracking
- Revamped Post Charge screen
  - Allow user to choose billing and treating dentist/ location at time of posting charge
  - Ability to see insurance worksheet to determine breakdown of money

- Ability to create Charges from Codes setup screen for easier setup
- Systems to handle when insurances will pay for charges that are limited by a period
- Ability to assign a discount type and discount percentage by billing party. This can also be adjusted as needed at time of posting

Coverage Book

Name:

Code Types:

Code	Description	Amount	Percentage	Ded Applies	History
D0120	Periodic oral evaluation	\$100.00	80%	<input checked="" type="checkbox"/>	History
D0140	Limited oral evaluation - problem focused	\$200.00	50%	<input type="checkbox"/>	History
D0150	Comprehensive oral evaluation - new or established p	\$300.00	3%	<input type="checkbox"/>	History
D0150	Comprehensive oral evaluation - new or established p	\$300.00	2%	<input checked="" type="checkbox"/>	History
D0310	Sialography	\$70.00	90%	<input checked="" type="checkbox"/>	History
D9974	Internal bleaching - per tooth	\$0.00	30%	<input checked="" type="checkbox"/>	History

OK Ca



### Scheduling:

- Assign pediatric dentist to appointments
- Assign Charges to Appointment Types when making appointments
- The Charge abbreviations tied to the appointment will display on scheduled appointments

### Dental Treatment Planning:

- Create dental treatment plans
- Ability to print dental treatment plans
- Submit Pre-Determination claims from the Treatment Planning screen
- Schedule appointments from Treatment Planning screen

### Dental Tooth Chart:

- Chart existing dental conditions
- Chart dental procedures performed per Visit
- Chart proposed procedures from dental treatment planning
- Dental tooth chart field, to chart dental conditions, per visit

The screenshot displays the Dolphin Management software interface. The top section shows the 'Treatment Plan' for a patient named Smith, Alexander, with a provider of Christopher Jones. The plan includes a table of procedures with columns for Code, Description, Tooth, Surface, Quadrant, View, Standard, Adjustment, Insurance, Discount, Patient, and Status. Below this is the 'Tracking Dates' section, which is a table with columns for Description, Performed, Added By Emp, Added By Service, and Next Reminder. The bottom section shows the 'Dental Tooth Chart' with a grid of teeth and a list of procedures on the right.

Description	Performed	Added By Emp	Added By Service	Next Reminder
Panoramic				
Survey				
Update Insurance Information				
Update Medical Information				
Progress	2/11/16	Admin	D9973	9/4/16
Cleaning	3/15/16	Admin	101	

## Legend Series



Ms.  
Charlene  
White

### Charlene White's SOS, Systematic Office Solutions

The Charlene White's SOS includes a statistical monitoring system that quickly compares your practice numbers to Charlene's benchmarks. Also, effective scripting for your staff is a keystroke away, along with scheduling templates perfect for any sized practice, and a guide to implementing an effective recall system. A companion 60-minute DVD is part of this module.



Dr.  
Ron  
Roncone

### Roncone Modules

The Dolphin Roncone Modules integrate seamlessly with Dolphin Management to optimize your daily practice workflow. Powerful tools include Dr. Roncone's signature Practice Monitor, Doctor Time scheduling, Procedure Timings Report, exam questionnaire and letters, presentation templates, treatment card templates and a comprehensive Diagnostic Check List.



Mr.  
Paul  
Zuelke

### Zuelke Financial Expert

The Zuelke Financial Expert was designed specifically for the Dolphin Management system and is a useful add-on module for every Dolphin practice. This module helps you efficiently manage financial delinquencies, account collection, financial situations requiring review, and other related tasks to allow a greater insight to your practice performance and statistics.