

What's new in Dolphin Management

10.6

Welcome to Dolphin Management 10.6!

This document provides an overview of many of the new features that have been added since version 10.5. This lists Dolphin Management 10.6 features followed by Specialty Module 10.6 features followed by a new section specifically for our Canadian customers.

Please see

<https://www.dolphinimaging.com/Areas/Media/Documents/MinimumRequirements.pdf> for complete technical specifications. Dolphin Imaging 11.95 and Aquarium 3.5 are recommended for use with Dolphin Management 10.6.

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New Management Features in 10.6

General

- Before completing an update to a new release of Dolphin Management, we now check for existing sessions, and we open a warning message that instructs the user to close all active sessions prior to completing the update. Users can then cancel the update and close the Dolphin Management sessions before attempting to update the program again.
- The **SSN/Gov't ID #** field for patients, doctors, billing parties, and other entities includes a drop-down menu so you can choose the desired format (in cases where you have set up the **SSN/Government ID Format/Mask** on the **System Options**→**General** tab to accept multiple formats).
- We now track and log when users make changes to **System Options** accessible under the **Tools**→**Options** menu.

Alerts

You can now set up and use Quick Notes for alert texts.

Edit → **General** → **Quick Notes** → **Alerts**

Analysis

- At the request of our customers, we added the **Export to MS Excel** option to the **Practice Analysis** detail screens.

Print → **Export to MS Excel**

- We added a new view to **Practice Analysis: Open Reservations**, which shows the total number of open reservations by type, class, or all types for the given time period and location. This information from this analysis is also included in the **Complete Practice Analysis** view.

Analysis → **Practice Analysis** → **View** → **Open Reservations**

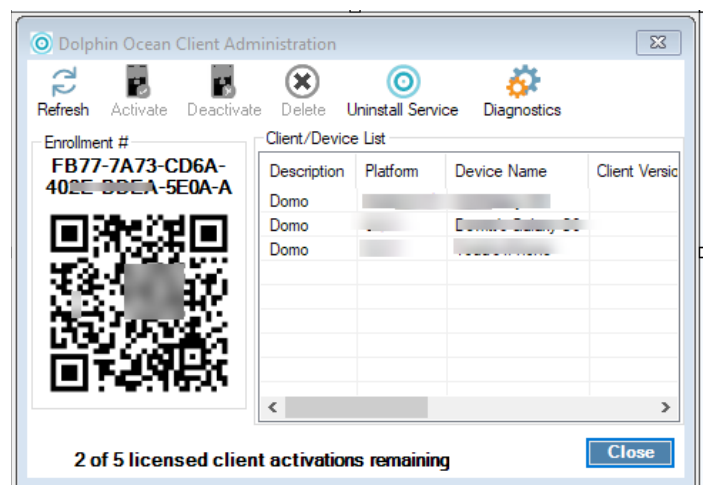
- We made performance improvements to the **Practice Analysis, Procedure Counts** view.

AnywhereDolphin/Dolphin Mobile/Online New Patient Forms/My Orthodontist Integration

- It is now required for practices using AnywhereDolphin or MyOrthodontist to enable the integration we introduced in Dolphin Management 10.5; we no longer support the older integration activation method.

NOTE: Check for activation as soon as possible after the 10.6 upgrade to ensure that no service disruption occurs for online questionnaires, Dolphin MyOrthodontist, and other AnywhereDolphin functionality.

- Practices using Dolphin Mobile must configure their server for Cloud connection type, and enter the full 32-character enrollment number; we no



longer support the older, 12-character enrollment number. We recommend you use the QR code that appears on the Dolphin Ocean Client Administration screen, as it is must faster and more convenient than manually entering all 32 characters.

Concierge

We added a new scheduling option: **Max # of openings per day to offer (0= no limit)**.

Edit → Communication → Concierge Setup → Misc Options tab

Chat Message Viewer

When the employee/application right, **Patient-Related Chat Messages in Patient History – View All** is granted to an employee, the **Chat Message Viewer** now behaves as follows: If a patient is selected, the **Employee** drop down menu is enabled; if the patient is then deselected, the **Employee** drop-down menu defaults back to the logged-in employee, and the drop-down is disabled.

Document Organizer

We added a new NTWAIN scanner option to the Document Organizer, which becomes available after you enable it via **Edit → Integrations → Plug-Ins Configuration → Document Scanner**. You must disable any other scanner plug-in you are using before you can activate this one. If the computer you are using has any scanning issues, please configure or have your administrator configure the NTWAIN scanner plug-in on that computer.

Edit Menu

- We added a new check box on the **Add an Appointment Class** dialog box: **This is a Start**, which when checked indicates that all appointments of this class count as treatment starts; this is used for production goals tracking, described under **Financials**.
- We added a new drop-down menu on the **Add/Edit an Appointment Type** dialog box: **Default Goal To:**, from which you can select **Provider**, **Assistant**, or **Location**. When you make an appointment of this type, whatever you select here will be selected by default, but you can override it at that time. This is also used for production goals tracking, described under **Financials**.
- We added a new employee right **Create New Timepoint Names**, which, by default, is assigned to any employee or role with the **Create/Copy/Paste Timepoint and Images** right. This right allows employees to create a new timepoint name rather than just picking from the list of available timepoints, when adding a new timepoint for a patient.
- The **Partner Integration** tab is now displayed when editing a doctor.
- When you set up quick notes via the **General → Quick Notes** option, the **Quick Note Type** drop-down menu option **Day** has been renamed to **Day Notes** for clarification.
- We added a scrollbar to the **Edit a Location Options** screen (**Edit a Location → Options** button), and Dolphin “remembers” the selected screen size.

Email

- We now support OATH2 authentication for our customers using Google Gmail. Gmail account users will not be able to send email within Dolphin Management when Google stops supporting SMTP authorization, which is why we offer these users the opportunity to update their Email settings. From Dolphin Management’s **Email Account Options** screen, you can now access Google to grant permission for Dolphin Management to send email from your Gmail account. A brief summary of this process is provided below:

1. From the **Email Account Options screen** → **Server Information** group box, change the **Authentication Method** field to **OAUTH2**.

Server Information

Outgoing Mail Server (SMTP):

Port:

Authentication Method: Use SSL

Provider Email Frequency

Maximum emails to send every minutes

2. Click the **Authorize** button that appears in the **Login Information** group box on that screen.

Login Information

User Name:

Authorization:

Domain:

3. When the Google WEB page opens in your browser, follow the steps to grant Dolphin Management permission to send email on your behalf.

- You can now open the address book via the **SMS/Email Manager** queue in the context menu, if the entity is a patient.
- You can now navigate to other screens while entering an email in progress without having to cancel and close out of the Email screen.

Financials

- You can now set up and track production goals for your practice. In order to take advantage of this feature you must:
 - Have schedule templates set up and in use
 - Have Appointment types/and or appointment classes set up and added to your schedule templates
 - Have the new employee rights granted: Production Goals – Edit and Production Goals – View (**Edit** → **Practice** → **Employee Rights Overrides** → **Financials**).

Manage Production Goals

Goal Period:

Location:

Schedule Templates Appointment Types Appointment Classes

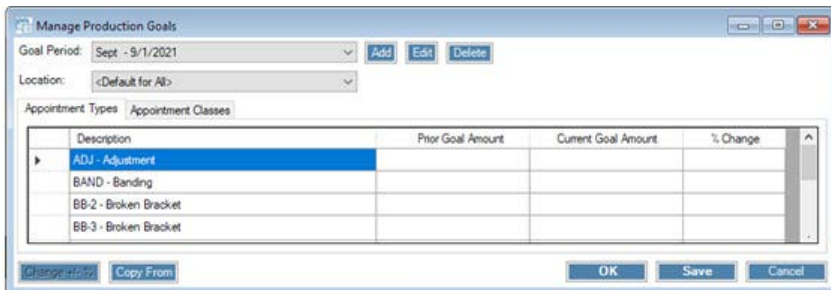
Set goals by Production Employee

Description	Prior Goal Amount	Current Goal Amount	% Change

You set up production goals via the **Manage Production Goals** dialog box (**Edit** → **Financial** → **Production Goals**), which is blank until you define your first goal period.

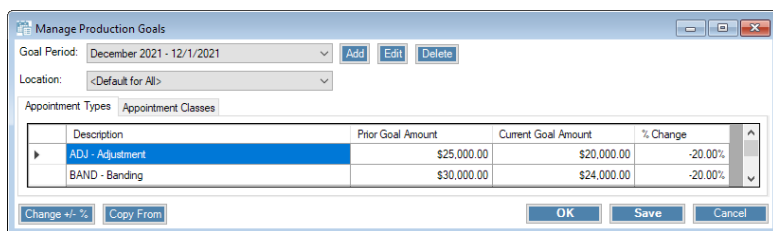
Each goal period is defined by a start date only; to end a goal period and set different goals, you must start a new goal period. For example, your goals during the month of December may be less, due to holidays, then the goals you have for other months. Once December goals are set, and you need to change the goals for the month of January, you must define another goal period for January, beginning January 2 (January 1 being a holiday). Goal periods are completely customizable; you define the length of each goal period when you select the effective date for the next goal period; goal periods can last months, weeks, or even days.

Once you define a goal period, the **Appointment Types** and **Appointment Classes** tabs are updated with the appointment types and/or appointment classes in your database, respectively.



From here you can either set goals for different practice locations, or set default production goals (<Default for All> above) and then copy those to one or more locations.

When you first set goals, you click in the **Current Goal Amount** column to enter the goal amounts for each appointment type or class listed. As you add more goal periods, the **Prior Goal Amount** Column and **% Change** columns are updated automatically.



From here you can add more goal periods, and Dolphin prompts you to copy the goal values from the current goal period. You can also use the **Copy From** button to copy the

values from a specific goal period to a new goal period.

1. To set schedule template goal amounts, select a location from the **Location** drop-down menu. The **Schedule Templates** tab appears, populated with the schedule templates for the location you selected.
2. For each schedule template listed, enter a value in the **Current Goal Amount** column.



You also have the option to track goals for each employee defined as a Production Employee in your practice. Dolphin provides a starting point for this entirely customizable option, and you decide how you want to use it. This option becomes available only after you entered goal values on one or more schedule templates.

1. On the **Schedule Templates** tab, click to check the **Set goals by Production Employee** check box. Instead of a list of schedule templates, a list of employees defined as Production Employee appears under the Description column.
2. Click the **Estimate All** button.

A list of employees defined as Production Employees appears under the Description column, with the Current Goal Amount column completed based on the Current Goals Total divided by the number of production employees.

The Current Goals Total is calculated based on:

The current goal amount for each Appointment Type/Class on the Schedule Template multiplied by the number of appointments of that type/class on the schedule template.

3. For each production employee listed, click in the **Current Goal Amount** column, and modify it as desired.

When you set up production goals, you can quickly view them on the Schedule using the new **Goals** tab on the schedule widget.

- We now include the latest CDT code set for our United States customers. When you update to Dolphin Management 10.6, the **Default Code Type** field on the **System Options, Financial** tab is automatically updated to **CDT 2022 Codes**, which are then populated throughout the product.

Insurance

- We now offer electronic insurance claims processing for Canadian customers through our CDAnet integration. This is described under [What's New for Canadian Customers](#).
- When you set up the insurance benefit, we now require you to enter an expected monthly amount when you choose the **Accept Assignment** option.
- We now include the standard ADA 2019 insurance form for paper insurance claims in the United States. Any employer plan or insurance policy previously configured to use the ADA 2012 insurance form has been updated to use the new form.
- When you update a patient's insurance policy information, or add a new policy for a patient, and there are other patients associated with the same billing party under the same employer plan, we now prompt you if you want to update the policies for those other patients as well.
- We clarified the message box that appears after users post an insurance overpayment. The **Insurance Overpayment** message box now presents the following two options:
 - Apply to Remaining Benefit – Use this option if the insurance overpaid the expected benefit charge, or there is no charge in the total due, and you want the credit applied to the unbilled benefit. Check to adjust the next form date, if needed.
 - Do Not Apply Insurance Credit toward the Remaining Benefit – Use this option to apply the credit to a charge you expect to post within the next few weeks.

- You can now create an orthodontic Predetermination claim from either the **Edit a Patient** screen or the **Patient Treatment/Contract Proposals** screen. In prior releases, you had to complete the insurance benefit

first. Now, you can now access the **Insurance Claim** screen from the **Patient Treatment/Contract Proposals** screen and the **Edit a Patient, Insurance** tab, **Policy Information** group box via a new **Send PreD/Send Ortho PreD** button. Depending upon whether you have set up the insurance policy and treatment yet, the following screen appears with that information completed for you. If you have not provided that information anywhere in Dolphin, enter it here, then click **Save** to open the **Insurance Claim** screen.

On the **Insurance Claim** screen, simply click **OK** to create the claim and add it to the insurance claims queue.

- We have added the **Time of Service** option to the **Edit an Employer** screen → **Employer Plans** tab → **Continuation Frequency** drop-down menu. This corresponds to the **Continuation Frequency** option

(added in a previous release) on the **Edit a Patient** → **Insurance** tab.

- At the request of our customers, we added a **View Plan** button to the **Edit a Patient** → **Insurance** tab → **Policy Information** group box. Click it to open the insurance plan for that patient.

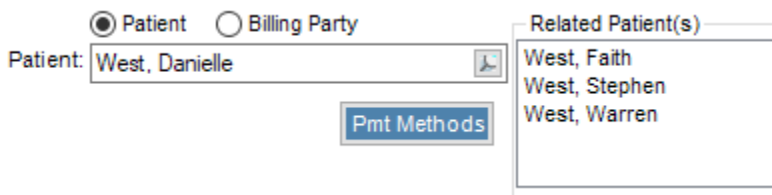
- At the request of our customers, we added a new check box, **Minimum of 90 Days**, which appears when the **Continuation Frequency** is set to

Quarterly. This ensures that claims are not sent out before 90 days have passed in cases where an insurance company will reject a claim when a quarter includes short months, which causes fewer than 90 days between claims.

- We made the following enhancements to the **Insurance Claims** queue:
 - When you edit a claim and change the date, we now prompt you if you want to change the date on all items tied to that claim, provided there is more than one item.
 - You can now double-click on the grid to edit a charge.

Ledger

- At a customer's request, we added a **Pmt Methods** button on the billing party ledger. This button is visible to employees who have the right to edit credit card numbers (**Employee Rights → Financials → Credit Cards → Edit**).



- You can now right-click on an unbilled insurance benefit, and adjust it, even if the balance is \$0. This makes it easier for practices to fix the ledger when they accidentally write off the entire insurance amount. This applies to started benefits only.
- When you attempt to transfer a payment on the same day you post it, we now display a message box informing you that you cannot do that prior to End of Day. After you click **OK** on that message box, the **Transfer Payment** screen opens where you can only do a reverse/repost.
- We added an OrthoBanc icon to the billing party ledger just below the Patient/Billing Party chooser field for those patient/billing parties linked with OrthoBanc.
- We now show a tool tip that shows the billing party and insurance company phone numbers including notes when you hover over their tabs on the ledger.
- The **Total Payments** field at the top of the Ledger has been replaced with two fields: **Gross Payments** and **Net Payments**. As part of this enhancement, we added a new system option, **Subtract Refund Adjustments from Net Receipts** (**Tools → Options → Financial** tab)
- When you print the **Ledger**, and you have disabled the **Show Orthodontist Changes** option, that information no longer prints.

Letters

We added the letter token TodayMonthDayYear, which outputs the month name, ordinal day and year, for example: August 11, 2021.

OrthoBanc Integration

- We added a **Location Name** column on the **OrthoBanc Setup Wizard → Existing Provider Account Setup** page. This was added to differentiate the same provider working at multiple practice locations.

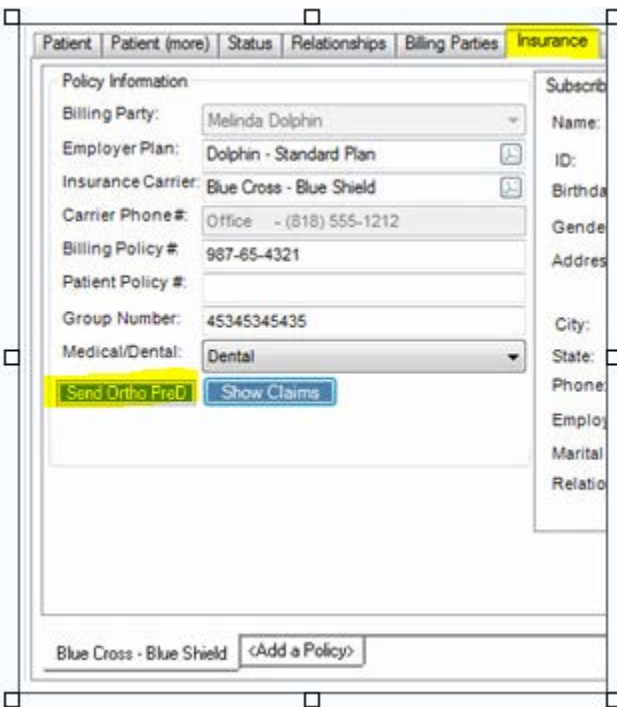
Patient GPS

- The **Chair(s)** list box now shows each chair with the location appended to it on the **Sign-In, Patient GPS and Light Bar Locations and Chairs** screen.

Patient Information

- We added a **Status** column in **Patient Lookup** that shows the patient's status in the colors associated with the that status.
- We enhanced the **Billing Party Lookup** screen, that appears when you add a new patient, and associate that patient with an existing billing party:
 - The section containing the check boxes is now scrollable.

- If the selected billing party has active insurance policies associated with existing patients, you now have the option to copy those policies to the new patient, via the new **Insurance Policies to Copy** group box. Simply click to check the policy and all of the information from that policy will be copied to the insurance policy for the new patient.
- When you add a sibling for a patient who already has an insurance policy on file, you can copy the existing patient’s policy over to the new patient via the new **Copy From** button.
- We added a **Questionnaire** option to the standard right-click menu, which when selected, opens the **Questionnaire** or **Super Questionnaire** dialog box for the patient in context.
- We added a **Termination Date** field to the **Edit a Patient, Insurance** tab, **Policy Options** sub-tab. This is populated with today’s date when you click the **Policy Inactive** check box, or you can enter a date in the past, and the **Policy Inactive** check box is automatically checked.
- As part of the previous enhancement, The **Billing Party** drop-down field in **Patient Comments** now includes the policy group number, and appends ** to any policies that are currently inactive.
- We added a **Send Ortho PreD** button to the **Edit a Patient, Insurance** tab, **Policy Information** group box:



This button does not appear if the policy on file is marked as inactive.

- We enhanced the process of adding a new billing party to a patient record:
 - If the patient is 18 or older, and has not been added as “self” in the Billing Party fields, the following prompt is displayed:
 “Would you like to copy the patient’s personal and contact information to this billing party?”
 If you click Yes, the following information is copied from the patient to the new billing party:

Name

Sort Name

Gender (from the **Identifies As** field, if set, or from the **Gender** field)

Greeting

Birthdate

SSN

Address

Phone Numbers

Email Addresses

Mail Method

Language

- If the patient is under 18, the following prompt is displayed:

“Would you like to copy the Patient’s contact information to this Billing Party?”

If you click Yes, the following information is copied:

Address

Phone Numbers

Email Addresses

Mail Method

Language

- We improved the speed when opening **Edit a Patient** over VPN.
- As part as the CDAnet integration for our Canadian customers, we use the **Edit a Patient, Language** field to determine the language to use when generating certain reports. All reports are generated in English by default; however, we anticipate being able to use this feature for other languages in the future. Currently we support French for Canadian customers using the CDAnet integration feature.

Reports

- We created a new report for customers using the Hummingbird reports: All Non-Zero Insurance Accounts, which includes the following columns, not in our standard All Non-Zero accounts reports:

Last Proc

Last Proc Date

Next Proc

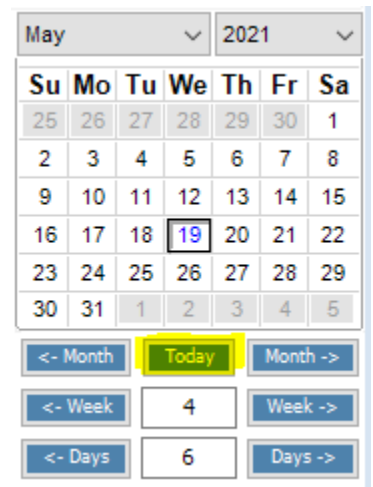
Next Proc Date

- We modified the Hummingbird **Morning Huddle Report** to always pull data as of the current date, regardless of the selected report criteria date, so that the data for active patients without an appointment matches what is in the “Patient in Active Treatment Statuses without a Future Appointment” report. We also added the statement “This section is as of today” to the Morning Huddle Report for clarification.
- The Hummingbird Start Needed Status, Growth Guidance Phase II Pending, and All Status reports now include the following columns:
 - Last Message Date
 - Last Message

- Last Email Date
- Last Email Message
- We added the **Patient Insurance Termination Date** field to the **Patient Insurance** field category in DIRT.
- We added the **Appointment Type Minutes** field to the **Schedule** field category in DIRT.
- At the request of our customers, we added the following fields, sortable by date, so they can sort on when an appointment entered the most recent status
 - Appointment Status Date Time
 - Last Appointment Status Date Time
 - Last Dismissed Appointment Status Date Time
 - Next Appointment Status Date Time
 - Next Appointment Including Today Status Date Time

Schedule

- The **Search Schedule** now allows you to search on **Any Reservation**, a new **Search By** option.
This searches for any open type and/or class reservation that meets the other search criteria you enter. The search results include a **Type/Class** column that lists the type or class of any open reservations found. You can right-click on an open reservation and further refine the search based on the type or class of that reservation, and find other appointments of the selected type or class.



- When you click on **Today** button, the schedule is refreshed.
- If your practice has set up, and you have permission to view production goals, the Schedule widget now includes a **Goals** tab. Here you can view productions goals for a specific employee or all employees, again depending upon your application rights. See **Financials** for information on setting production goals.
- You can now control whether patients are put on recall automatically after an appointment cancellation via a new System Option:

Tools → Options → Scheduling tab → Put patient on Recall when cancelling an appointment, by default

- You can now specify whether you want Dolphin Management to require staff to specify whether the patient or practice cancelled and/or rescheduled an appointment, via two new system options:

Tools → Options → Scheduling tab

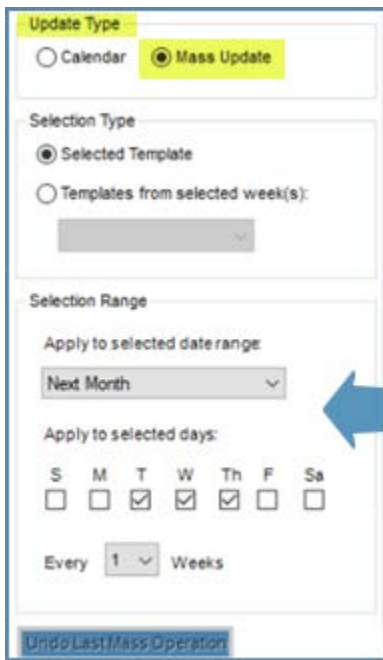
- **Require staff to select who (patient/practice cancelled an appointment)**
- **Require staff to select who (patient/practice) rescheduled an appointment**

These are un-checked by default. When checked, the appointment cancellation prompt will no longer default to “By Patient,” but instead require the user to actually select either the **By Patient** or **By Practice** radio buttons to complete the cancel or reschedule request.

- At the request of our customers, the **Dismissed Appointment Time** field in the School Excuse now uses the actual time the appointment was dismissed, rather than the scheduled or printed dismissed time. This allows offices to print accurate school excuses for past appointments.
- You can now print a school excuse for an appointment that occurred in the past. Simply right-click the appointment in the patient's appointment history, and select **Print School Excuse**.
- We added a **Weeks Out** column to the patient appointments list (*Edit a Patient* → **Appointments** tab), which shows the calculated number of weeks out from today (for future appointments only).
- We added an **Early/Late** column to the patient's appointment history grid. This shows the number of minutes a patient was early or late at sign-in, or the number of minutes late a patient is for an appointment on today's schedule.
- You can now enter Day Notes or Block Notes that span across multiple days. On the **Day Note** screen, you can now enter both a **Start Date** and an **End Date** for each note. Specify an end date that is greater than the start date, and the Day Note or Block Note will appear in the schedule across every day in the given date range.
- When viewing a patient's appointment history, you can right-click on a scheduled appointment and access the **Confirm** or **Unconfirm** options.
- We added a new per-user option under the **Options** tool bar button: **Automatically load selected appointment's patient in Patient Navigator**. When the patient navigator at the bottom of the schedule is visible, and this new option is checked, any time you click on an appointment in the schedule, the associated patient's information is loaded into the patient navigator.
- We enhanced the **Checkout** wizard in the process of fixing a problem with future appointments and NVs:
 - We clarified the labels to indicate whether an appointment was scheduled and the scheduled date.
 - If the Next Visit appointment has already been scheduled, the Search button is disabled.
 - If you highlight an appointment in a list, and that appointment has already been scheduled, the Search/Schedule button is disabled.

Schedule Templates

- At the request of our customers, we added a new way to apply schedule templates to their future schedules. On the **Apply Template** screen, in the new **Update Type** group box, click the **Mass Update** radio button to open a list of options (shown enlarged in the screen shot), which you can use to quickly customize and apply templates:



In the **Selection Type** group box, you specify whether to use the current selected template or **Templates from selected (week(s))** drop-down menu.

Use the options in the **Selection Range** group box to apply the selected template or templates from selected weeks to the date range you specify.

After you click the **Apply** button, Dolphin Management opens a dialog box listing the selections you made, and prompting you to confirm these selections.

After you click **Yes** to confirm, you will still have the option to undo the last mass operation.

- Every time you apply a schedule template mass update or undo a mass update, Dolphin logs it in the **Database Log Viewer**.

Tools → View Database Log

Scheduled Job Manager

We added a new scheduled job for sending mass online questionnaires. (**Tools → Scheduled Job Manager → Task → Automated Questionnaire Messages**).

SMS Messaging Center

We added an option available to the administrator role only: the ability to mark unread messages addressed to all employees as read and refresh the Inbox.

Right-click **Inbox → Remove Unread Message Flags**.

You are then prompted to enter a date before which any unread messages addressed to all employees should be marked as read.

Treatment Card

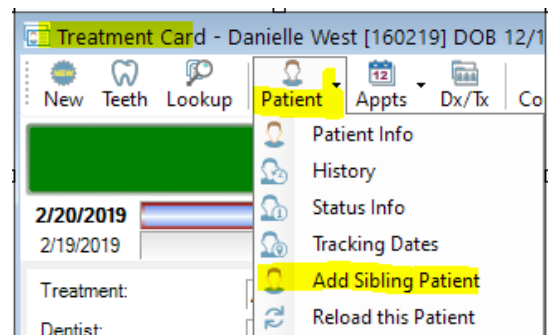
- We enhanced the editing capabilities of any treatment card field specified as This is a “Remarks” Field on the Treatment Card Layout. When editing this field in the treatment card:
 - Keyboard arrow keys move the cursor within the text notes rather than the active cell.
 - Control + Left Arrow and Control + Right Arrow keystrokes move the cursor to the beginning of the previous or next word in the notes, respectively.
 - Control + Shift + Left Arrow selects characters from the current cursor position to the beginning of the previous word. If the cursor is in the middle of a word, the characters at the beginning of that word are also selected.

- Control + Shift + Right Arrow selects characters from the current cursor position to the beginning of the next word. If the cursor is in the middle of a word, the additional characters are also selected.
- Control + Z and Control + Y undoes or redoes the most recent change.

- We have integrated with Change Healthcare’s electronic prescription module, Clinician. When this integration is set up, a new Clinician toolbar icon appears on the treatment card. When you click this button, the patient is opened in Clinician, and you can create a prescription there. Any prescriptions created in Clinician will appear in the treatment card grid with a Clinician icon.

Note: If you are interested in Beta testing this integration, contact us at DMBeta@dolphinimaging.com.

- We now show the appointment start time in the treatment card grid when you show Past Appointments (**Options → Show Entry/Field Types → Past Appointments**).
- You can now add a sibling patient directory from an existing patient’s treatment card! From the **Patient** tool-bar button cascade menu, select the new **Add Sibling Patient** option. One of the following occurs:



- If the current patient has one billing party only, the **Billing Party Lookup** screen opens where you can select the billing party information to copy and then go directly to the **Add a Patient** screen.
- If the current patient has more than one billing party, you are prompted to select from the billing parties associated with that patient, before the **Billing Party Lookup** screen opens followed by the **Add a Patient** screen as described above.

- You can now copy and paste treatment card notes from a previous Visit entry to another. Simply click and highlight the text you want to copy, press CTRL+C, then click in the field you want to copy, and press CTRL+V. Copy and paste options are also available in the right-click menu for treatment card text entries.
- When a patient is within 6 months of completing treatment, the progress bar in the treatment card header turns yellow.
- We improved the way user application rights work when a user does not have permission to edit text in a treatment card text column.
- We improved the performance of loading global treatment plans.

Zuelke Financial Expert

- We added a prompt that is displayed when a user clicks the ZACC button but does not have a username or password for ZACC. Employees need to be set up to use the ZACC feature prior to attempting to get a credit report by clicking ZACC (**Edit a Patient → Billing Parties tab → Financial sub tab**).
- The Zuelke Case Start Tracking Form A report no longer includes fully discounted treatment starts for which the rating was Not Rated. These starts show up on the B/C reports.

New Features in Specialty Module 10.6

Analysis

- On the **Dolphin Management Practice Analysis** screen, when you select a specialty filter, we automatically select the provider associated with that specialty.
- You can filter the **Open Reservations** module (in **Practice Analysis**) by specialty.
- You can filter the **Procedure Counts** module (in **Practice Analysis**) by the specialty of the scheduled appointment type.
- The **Treatment Card Procedure Counts** includes only appointment types assigned to the selected specialty. It also applies location and provider filters against patients' normal location and provider for assigned specialties.

Edit Menu

- We added a new check box to the **Add/Edit a Charge** screen: **Show Code and Description on Ledgers**. This option is on by default.
- We added a new tab to the Add/Edit an Employee screen that appears only if the employee Type (**Add/Edit an Employee**→**General** tab→**Type** field) is set to **Provider: Provider Network Settings**. This tab allows you to quickly specify whether the employee is **In-Network** or **Out-of-Network** for each employer/insurance plan combination listed. The default for each plan is **Not Set**.

Dental Treatment Chart

- The charge grid includes two new tabs on the left side: **Current and Future** and **Prior Work** (See **Chart Prior Work** below). The **Current and Future** tab is where you chart current and proposed procedures/charges the way you did in version 10.5. The **Prior Work** tab is described in the following section.
- You can now print dental proposals from the **Dental Treatment** screen.
- We added quick selection buttons at the top of the **Choose Tooth and Surface(s)** screen, so you can quickly apply common multi-surface combinations when selecting a charge that requires you to specify two or more surfaces.

Tooltips on each button describe the surfaces to which the button corresponds. For posterior teeth, the possible buttons are MO, MOD, DO, OL, OB, MODL, and MODB.

For anterior teeth, the possible buttons are MIFL, ML, MF, DIFL, DL, and DF.

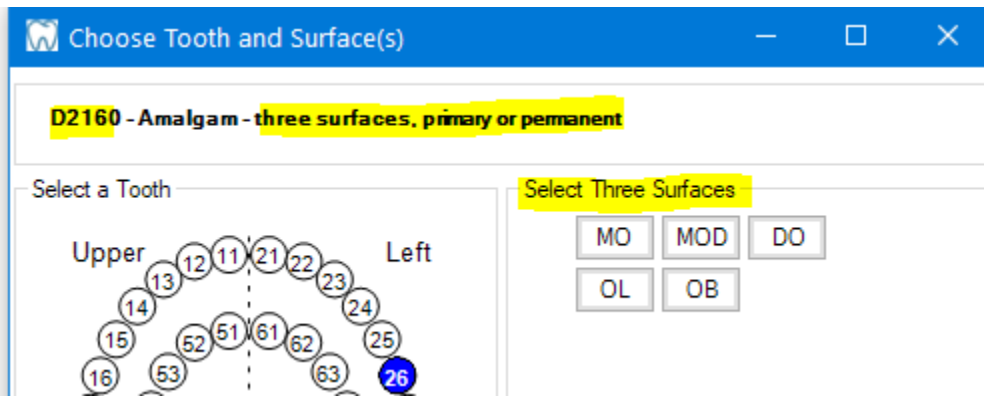
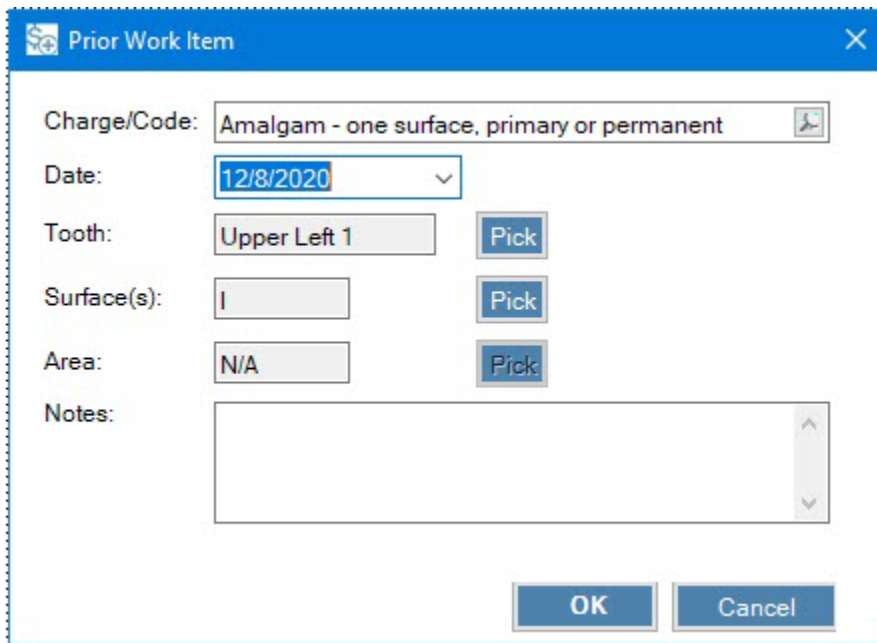


Chart Prior Work

We added the ability to chart work that was performed elsewhere, prior to today, such as work based on information from patient records, interviews, or questionnaires.



From the **Treatment Card**, select the **Options** button → **Screen Setup, Colors and Fonts**. Click the new **Prior Work** check box on the **Screen Setup** tab.

To chart prior work, from the **Dental Treatment** chart, open the **Prior Work** tab. Right-click anywhere on the **Prior Work** tab to open the **Prior Work** Item screen shown at left. You also have the option to drag and drop items from the **Charges** or **Codes** list to the grid or to a tooth in the chart.

Once you add items, they are shown on the **Prior Work** tab highlighted in green. Any prior work already charted performed at

your practice appears there highlighted in blue.

Ledger

We added a new check box on the **Transfer To** portion of the **Transfer Charge** screen: **Do Reverse/Repost vs Transfer**. Click this if the payment was posted in error, and you want the transferred payment to be counted toward the transferred-to account when you run the “Provider Collection of Production By Employee” report.

Letters

We added the following new letter tokens:

AppointmentSpecialty
AppointmentSpecialtyDoctorType

Location Security

The Specialty module now supports location security, which when enabled, the office locations you set up will be available only to those employees to whom you grant permissions for each location.


Patient Information

We added a **Status** column in **Patient Lookup** that shows the patient's status in the colors associated with the that status. We also added colors associated with the specialty to the **Specialty** column in **Patient Lookup**.

Periodontal Charting

We now include a periodontal chart, which you can make available via a new treatment card field:

1. In **Treatment Card Setup** screen, edit the treatment card layout where you want to add a periodontal chart.
2. On the **Fields** tab of the **Treatment Card Layout** you are editing, click Add to add a new field.
3. On the **Treatment Card Field** window, **Field** tab, **Field Type** drop-down menu, select **Perio Chart**.
4. Enter a name and description for this column.
5. Save your changes

When you open a patient's treatment card to chart a visit using that layout, the following icon appears in the new column: 

6. Click on that icon to open the **Perio Chart**.

Note: If you have not set the patient's dentition in either the orthodontic or dental treatment tooth chart, a message is displayed prompting you to do that first. The periodontic chart honors the dentition specified in the most recent treatment card entry.

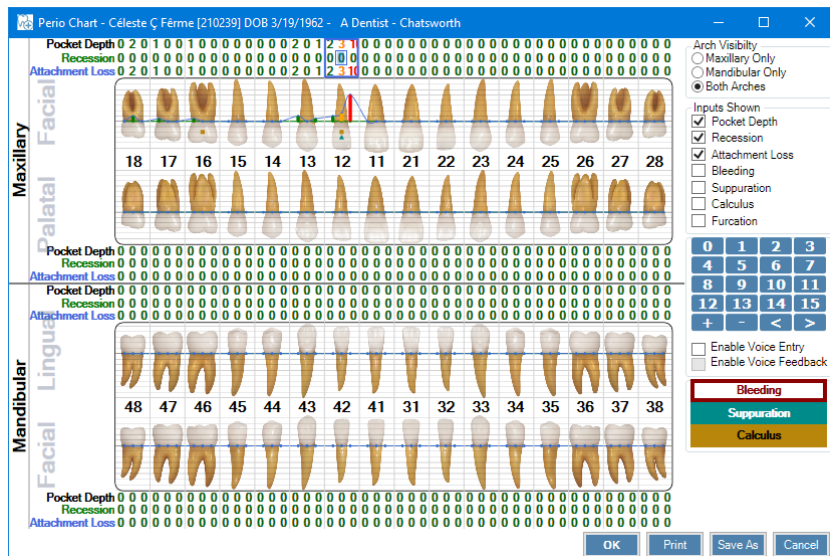
In the example shown below:

Four rows of teeth are displayed, as noted on the vertical labels on the left side of the chart. Additionally, each tooth is divided into 3 sites where you can input values or attributes corresponding to depth measurements or other observations you make along the gum line of the tooth.

The **Arch Visibility** group box controls which tooth arches show on the chart. The default is both Maxillary and Mandibular.

The check boxes in the **Inputs Shown** group box control which inputs you want to show on the chart. You can chart and thus show any of the following inputs:

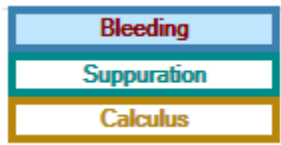
- Pocket Depth
- Recession
- Suppuration
- Calculus
- Furcation



The Attachment Loss input is a read-only value that shows the sum of Pocket Depth and Recession values.

7. To chart:
 - a. Click on a row above (or below) the tooth you want to chart.

A blue box surrounds the active rows associated with that tooth, and the following toggle buttons appear:



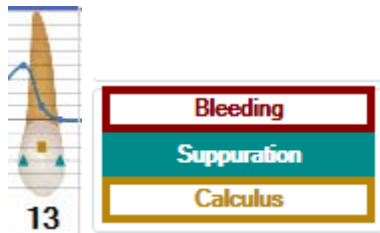
- b. Click in the row on which you want to chart.
- c. Click a number a value on the blue numeric keypad to place that number on the active tooth.

Note: Values you enter are color-coded as follows:

- Attachment values and bar graphs less than 3mm are green, 3mm are yellow, and 4mm or greater are red.
- Pocket Depth values less than 3 mm are green, 3mm are yellow, and 4 mm, or greater are red
- Recession values less than 2mm are green, 2mm are yellow, and 3mm or greater are red.

8. As you chart, you can toggle inputs for Bleeding, Suppuration, and Calculus,
Or
use keystrokes.

Example: enter S to toggle suppuration on or off.



Tooth site attributes are charted graphically as follows:

- Bleeding: solid, dark red circle
- Suppuration: solid dark cyan triangle
- Calculus: solid dark yellow square

9. Optional: To change from the default tooth numbering system (the one assigned to the employee doing the charting), right-click on the chart, and select a different TNS from the menu that is displayed.
10. Optional: If you have a microphone or headset connected to the computer, click the **Enable Voice Entry** check box to enable charting using voice commands. The charting site must have focus before you speak any of the following voice commands:
 - “zero” through “fifteen” to enter the value spoken and advance to the next tooth site.
 - “minus” spoken before a number command to enter a negative value.
 - “back” or “previous” to move the input focus to the next tooth site.
11. Optional: if you enabled voice entry, click the **Enable Voice Feedback** check box if you want each command read back to you for verification.

You can easily keep track of which treatment card entries have periodontic charting because a small green dot appears on the Perio chart icon to indicate it:

You can print a copy of the chart, or save it in .PNG format via the **Print** and **Save As** buttons respectively; charts are saved in the patient's **Documents** folder by default.

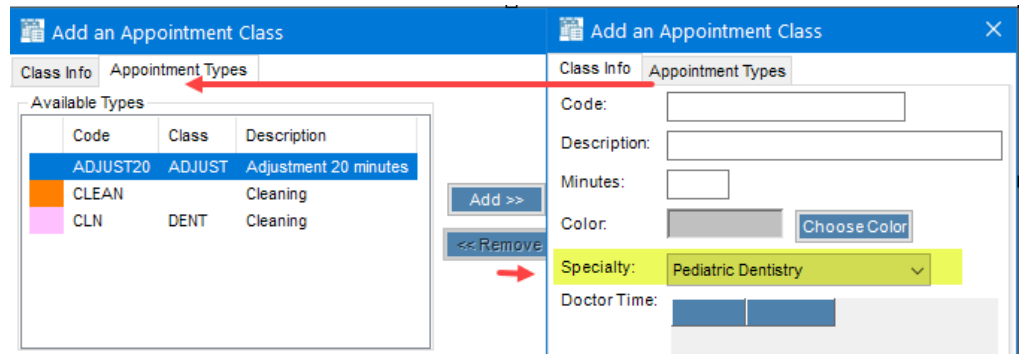
Reports

The **Daily Schedule and Collections** report now returns balances for the appointments of the selected specialty only.

Schedule

- You can now assign a specialty to appointment types and appointment classes, and we have added a **Specialty** field to the **Appointment Classes**, **Appointment Types**, and the **Add/Edit an Appointment Class** and **Add/Edit an Appointment Type** dialog boxes. The default for the **Specialty** field is **All**.

When you edit or add an appointment class, the list of available appointment types is limited to those appointment types assigned to the selected specialty. Additionally, if you change the class-assigned specialty and you have appointment types assigned to that class, a pop-up message is displayed so you can confirm you want to remove those appointment types from that specialty.



When choosing a class to associate with an appointment type, you must choose a class assigned to the same specialty. If you change the assigned specialty, the class selection is cleared.

Edit → **Scheduling** → **Appointment Types**

Edit → **Scheduling** → **Appointment Classes**

- We automatically assign a default specialty to all appointment types and appointment classes, based on the following rules:

Appointment Types:

Assign specialty that matches the specialty of the most recently-entered appointment on the schedule; otherwise use the specialty that was first enabled by the practice.

Appointment Classes:

Assign the specialty that matches the specialty of the first non-deleted appointment type assigned to the appointment class; otherwise use the specialty that was first enabled by the practice.

- When you make an appointment, the Appointment Type field selection behaves differently depending upon the specialty assignment made on the Appointment Type (**Edit** → **Schedule** → **Appointment Types**):
 - The field is disabled until you select a patient for the appointment.

- When making a patient's appointment from a reservation, the appointment's specialty is defaulted to the specialty assigned to that appointments class or type if the patient is also assigned to that specialty.
- If you switch to a different specialty while the Appointment Type and patient is selected, the Appointment Type field is cleared unless the selected appointment type is also assigned to that specialty.
- When you override the reservation, the Appointment Type lookup will show only appointment types that match the specialty.
- A warning message is displayed if you make an appointment of a type not assigned to the selected specialty if the patient is not assigned to that specialty.

Tools Menu

We now include a **Specialty** drop-down menu on the **Move Locations and Providers** utility tool. You must first select a specialty, which filters the **From Provider** and **To Provider** lists to include providers in that specialty only.

Treatment Card

In **Treatment Card Setup** → **Treatment Card Layout** → **Treatment Card Field**, the **Appointment Types** and **Next Visit Appointment Types** fields includes a new option, **Filter by Layout's assigned Specialty**, which is not checked by default. When you check this field, the appointment type selection is limited to the appointment types assigned to the same specialty as the treatment card layout you are using. For example, if you are on a treatment card layout for Pediatric Dentistry, the appointment types available are limited to those assigned to the Pediatric Dentistry specialty.

What's New for Canadian Customers

CDAnet Integration

For our Canadian customers, this section describes how to set up Dolphin CDAnet Integration and use it to send electronic claims. Before using this new feature, your practice must have:

- CDAnet software installed.
- Canadian charge codes entered in Dolphin.
- set your **Default Code Type** in Dolphin to be the code type required by CDAnet.
- the CDA billing and treating provider numbers handy for those employees responsible for electronic claims processing.

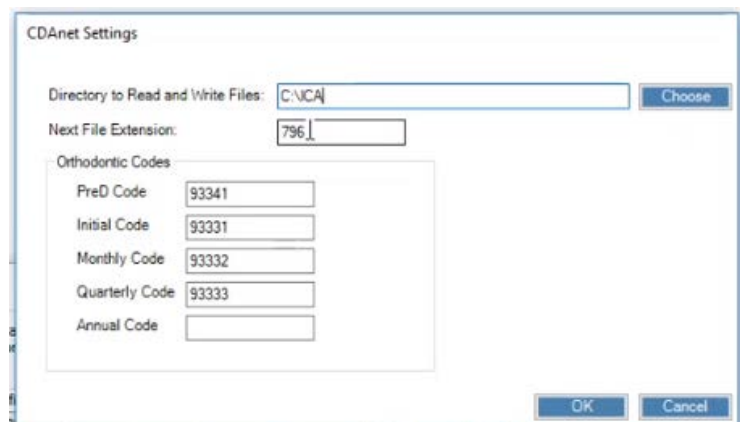
To set up your practice, you must configure:

- CDAnet plug-in
- Practice location
- Employees
- Insurance Carriers
- Directory watcher scheduled job

Step 1: Set-up your Practice:

1. From the **Edit** menu, select integrations→**Plug-Ins**.
2. In the **Plug-in Type** list box, select **Insurance Claims**.
3. Select **CDAnet** from the **Configured Plug-Ins** list box, and click **Add**.
4. Click **Settings** to open the **CDAnet Settings** dialog box, and complete the following fields:

- **Directory to Read and Write Files** is the directory on your machine where CDAnet writes transaction files, where Dolphin Management will look for them, and where Dolphin Management writes claims for electronic processing by CDAnet. Files in this directory are either named Input.xxx or Output.xxx
- **Next File Extension** identifies each file by a numeric extension, which updates until it reaches 999 before starting over.



- If you entered the CDAnet approved electronic codes prior to opening the **CDAnet Settings** screen, Dolphin automatically populates the codes for you in the **Orthodontic Codes** group box; otherwise, you must first create these service codes, then manually enter them here.

Note: customers in Quebec have a different set of codes than those we show above.

5. Click **OK**.
6. From the **Edit** menu, select **Practice**→**Locations**, and select the location to edit.

7. On the **Edit a Location** screen, Enter the number CDAnet uses to identify your location.

CDA ID:

Sequence #:

The **Sequence #** field is read-only, and it is associated with each transaction.

8. Click **OK**.
9. From the **Edit** menu, select **Practice**→**Employees**.
10. Click the **IDs** tab.
11. In the **CDA Provider Numbers** group box, enter the CDA billing and treating provider IDs for each employee who has one.
12. Optional: if there is an insurance carrier number assigned to an employee, enter it here also.

CDA Provider Number	Location	Insurance
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Step 2: Add or Edit Insurance Carriers

Dolphin's CDAnet integration includes a lookup list of all supported carriers. You should either edit any existing carriers you have and link them to the approved CDAnet carrier in this list, or add a new carrier. All of the information about that carrier will be imported into your system. To access this list:

1. From the **Edit** menu, select **Financial**→**Insurance Carriers**.
2. Select the carrier you want to edit, or click **New** to open the **CDA Carrier Lookup**, which includes a list of all supported carriers.

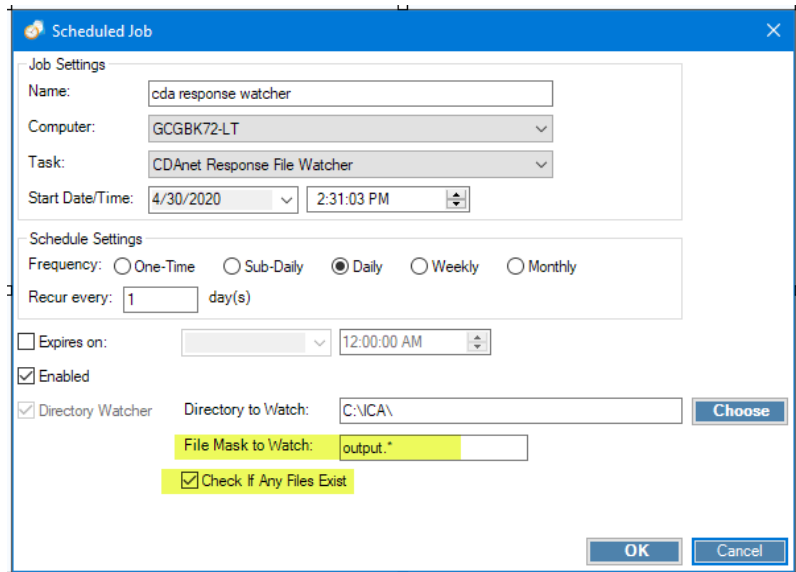
CDA Carrier Name	CDA Carrier ID
Accerta	311140
ADSC- Alberta Dental Services Corporation (Alberta Employment, Immi...	000105
Alberta Blue Cross	000090
Association des policières et policiers du Québec	628112
Assumption Life	610191
Autoben	628151
Benecaid	610708
Benefits Trust (The)	610146
Canadian Benefit Providers	610202
ClaimSecure	610099
Co-operators (The)	606258

For each carrier you add or edit on this screen, you can click on the **View** button to see a list of supported transaction types.

Step 3: Set up the Directory Watcher Job

1. From the **Tools** menu, select **Dolphin Scheduled Job Manager**.
2. On the **Scheduled Job** window, enter a name for the job your practice will use to monitor the CDAnet read/write directory you entered on the **CDAnet Settings** dialog box.
3. In the **Task** field, select the **CDAnet Response File Watcher** from the pull-down menu.
4. Set the **Frequency** to **Daily**.

5. Enter the directory to watch (the CDAnet read/write directory).
6. In the **File Mask to Watch** field, enter output.*
7. Click to check the **Check if Any Files Exist** check box; this ensures that in the off chance any files are already there, Dolphin processes these files before looking for new files.
8. Click **OK**.



Step 4: Electronic Claims Processing
 The **Edit a Patient** screen, **Insurance** tab includes 3 new fields specific to Canadian practices whether or not you use CDAnet:

Group Number:	1PLAN2
Dependent Code	00
Card No:	18
Div/Section No.	
Medical/Dental:	Dental
Eligibility Status:	<input type="text"/> <input type="button" value="Check"/> <input type="button" value="View"/>

1. Enter this information from your patient's insurance card.

If the carrier supports electronic verification, the **Check** button shown above will be visible, and you can click it to check this patient's eligibility status ; otherwise, you can enter a value in the **Eligibility Status** text box.

2. Click the vertical **Forms** tab, where you can complete the following fields, if applicable.

NIHB	
Band Number:	<input type="text"/>
Family Number:	<input type="text"/>
Eligibility Exception Code	Code not applicable

The information you enter here is copied to the insurance claim form.

3. Open the **Insurance Claims** queue either:
 - From the **Financial** menu, select **Insurance Claims**
 - Click on the **Show Claims** button on the **Edit a Patient, Insurance** tab.
 When you post charges, CDAnet claims are created automatically; the process for creating standard orthodontic claims has not changed.
4. To create a claim if you are not posting charges, on the **Insurance Claims** queue, click **Add Claim**.

If you have one insurance policy for this patient only, a message box opens, prompting you to specify whether or not the patient you are submitting a claim for has secondary insurance. This does not affect the program; CDAnet requires it be there as a reminder for you to ask patients this question.

5. Click **Yes** or **No** on the message box.

The policy information is copied over from the patient's record.

6. Click the **Form Fields** tab, which is where you enter additional information, as applicable to this patient:

The fields in the **Initial Placements** group box change, depending upon what you select. For example, if **Initial Placement Upper** is not checked, a **Date** field appears where you must enter a date in the past when it was placed.

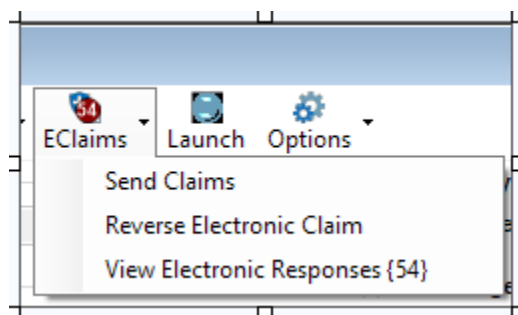
7. For carriers that do not support electronic claim filing, click the **Paper Only** check box.

These claims will be displayed in the **Insurance Claims** queue with two asterisks appended to the claim type listed in the **Claim Type** column.

Date	Carrier	Patient	Subscriber	Claim Type	Status	Response	Submitted
<input type="checkbox"/> 1/4/1999	Test Carrier #2	Hope, Noma F	Buddy B Hope	Special**	New		\$1,052.65

8. When you are ready to send electronic claims:
 - a. Click to check the box next to each claim you want to send.
 - b. Click the **EClaims** button and select **Send Claims**.

A descriptive warning message is displayed if there were problems sending any of the selected claims.



EOBs and ROTs

From the **Insurance Claims** queue, you can right-click on a submitted claim and select **View Responses** to open a dialog box from which you view responses from the insurance carrier, such as Explanation of Benefit (EOB), Claim Acknowledgment, etc. In the screen shot shown below, you can select the response (in this case, an EOB), and click **OK**, to open the EOB on your screen, where you can print it, save it etc.

View Electronic Responses

Patient:

Subscriber:

Insurance:

Created Date:

Submitted Date:

Claim Submitted Amount:

Claim Status:

Response Date	Type
2/17/2021	Explanation of Benefit

Additionally, the number on the **EClaims** button is a counter that indicates how many electronic responses you received but have not viewed.

Note: Responses to claims may not arrive in real time, though you still receive an acknowledgement that the claim was received. Claims are stored in a mailbox, and using Dolphin’s CDAnet integration, you can download the content of these mailboxes to check for responses to claims that arrived later in the day. This process is called a request for outstanding transactions or ROT.

To request outstanding transactions:

1. From the **Insurance Claims** queue, click the **EClaims** button, and select **View Electronic Responses**.

The **View Electronic Responses** dialog box opens. From here you can set search filters on specific response types, claims statuses, insurance carriers, date range, etc. or you can search on <ALL>.

2. Click the **Request Transactions** button.

The **Choose Mailboxes To Check** window opens:

Choose Mailboxes To Check

All Carriers/Locations

All Mailboxes Needed

By Carrier

By Location

Carrier	Location	Mail
<input checked="" type="checkbox"/> **TELUS-B	Chatsworth	Yes
<input checked="" type="checkbox"/> Accerta	Chatsworth	Yes
<input checked="" type="checkbox"/> Test Carrier #2	Chatsworth	Yes

You have the option to clear out all of the mailboxes that contain transactions, only the mailboxes from a specific carrier from one location, or other options on this window.

3. Click **OK**.

Post Charges

When you post charges, add any lab fees associated with those charges so they are charged in the ledger. You can do this via the **Add Lab Fee** button. (If you are using the Specialty Module, right-click a line on the charge grid and select **Add Lab Fee**.) Lab fees shown on the **Insurance Claim** screen are positioned below the charge item to which the lab fee applies.

Should you need to customize a specific charge or fix a mistake, click the **Edit Line** button to open the **Insurance Claim Charge** screen. This screen includes check boxes for Canadian procedure type codes that you can add to a specific charge:

- Repair of a prior service
- Temporary placement
- TMJ Service for correction
- Implant Service
- Appliance lost
- Appliance stolen
- None of the above (which is selected by default)

Reports

- When we generate Canadian claims forms, we use the **Edit a Patient, Language** field to determine whether to generate the claim forms in English or French.

