

Greenway MediaDent / Version 11.0

# **MediaDent Release Notes 11.0**

**DRAFT** – SUBJECT TO REVISION PRIOR TO GENERAL RELEASE

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121 Greenway Blvd.
Carrollton, GA 30117
866-242-3805

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# 1 Updated MediaDent Icons/Login Information

Project #MD-529

The main MediaDent icons and login screens have been updated with new icons and logos. No change has been made to the functionality.

#### **MediaDent Icons**

The MediaDent main icon will display in two colors: blue for the "heritage" section of MediaDent (which encompasses the Practice Navigator and all related screens), and green for the new MediaDent Console (which encompasses Charting and the updated Appointment Book (see Section 2 below).





MediaDent "heritage"

**MediaDent Console** 

The appropriate colors will display in the blue header bar in MediaDent to indicate the current section.

MediaDent® EDR [ MediaDent ]

MediaDent® Console

### **Login Screens**

The login screens have been re-branded with the updated Greenway logos as follows:

#### LOGIN SCREEN BRANDING



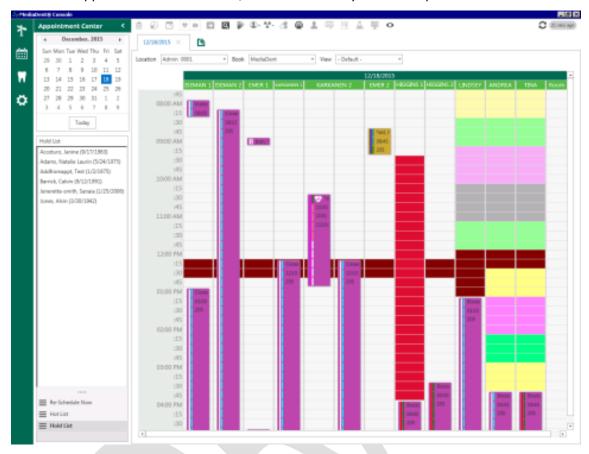
#### **INITIAL MEDIADENT PAGE BRANDING**





# 2 Updated Appointment Book

The **Appointment Book** has been updated with this software release. Most changes have been to the look and feel of the Appointment Book window; some functionality has been updated.



# **Understanding the Appointment Center**

# **Navigation Bar**





The **Navigation Bar** on the left-hand side of the **Appointment Center** enables access to the following modules in MediaDent:

lcon	Function
*	Practice Navigator  Opens the Practice Navigator window.
<b>:::</b>	Appointment Center  Opens the Appointment Center to display the default appointment book(s).
W	Charting Opens the Charting window.
<b>‡</b>	Settings Opens the Charting Configuration window.

Clicking the appropriate icon will take you to the desired module. Access to all modules via the Navigation Bar is always enabled.

# **Appointment Toolbar**



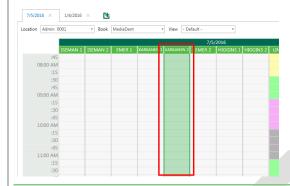
The **Appointment Toolbar** contains the following functions:

Icon	Function
Ô	Walkout Opens the Checkout/Walk-Out window for the selected appointment.
₽	Delete Appointment  Deletes the selected appointment from the appointment book.
Ö	Edit Appointment  Opens the Appointment Properties window for the selected appointment to enable you to make changes.



#### **Auto-Locate Similar Appointment Time**

Clicking this icon enables the system to search for and locate a similar day of the week and time of day for the patient's next appointment. The Appointment Book will display the first available similar future appointment time and highlight the applicable appointment range in green.



ΪŝΊ

Note - The next appointment is based on the recall frequency plus one day configured in Patient Properties. For example, if the recall frequency is 6, the system will search for the first similar appointment range at least 6 months + 1 day in the future.

<b>₽</b> -	Acquire Patient Photo  Click this icon to acquire a patient photo via the appropriate GURCA device.
<b>*</b>	Imaging for Selected Patient  Click this icon to upload any relevant imaging via the appropriate GURCA device.
1	Patient Properties  Opens the Patient Properties window for the selected patient.
	Patient Communication  Opens the Patient Communication window to enable you to add any relevant alerts, notes, or tasks to the appointment.
\$=	Account Ledger  Opens the Account Ledger window for the selected patient.
4	Patient Lab Case  Opens the Lab Transactions window for the selected patient.
	***

**Medical Alert** (formerly Medical Properties/Patient Medical List [\*\*])

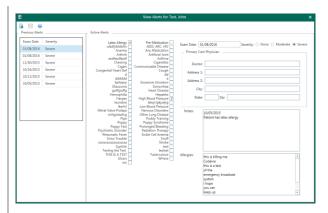
The Medical Alert button will be enabled for all patients. If the most recent medical record for

Click the button to launch the View Alerts screen and view the appropriate medical alert



conditions.

the patient is Severe, the button will display in red.



The **View Alerts** screen combines the former **Medical Properties/Patient Medical List** windows into a single screen:

- The Active Alerts section displays all current alert indicators for the patient (formerly displayed in the Medical Properties window).
- The **Previous Alerts** grid displays alerts for previous appointments display by exam date (formerly displayed in the Patient Medical List window).

#### Medications



Opens the **Prescription Transaction** window to enable you to prescribe any needed medications for the patient.

For integrated customers using SuccessEHS or Intergy, selecting this icon will launch the Medications screen for the appropriate core solution.

#### **EHR Chart**



For SuccessEHS and Intergy clients, the core SuccessEHS or Intergy solution will load and direct the user to the respective Chart module for the patient in context.

#### **EHR Orders**

For Intergy integrated clients, the Intergy System will load and direct the user to the Patient Info screen.



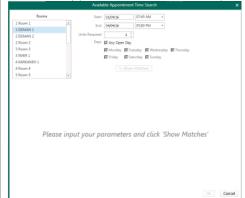
For Intergy integrated clients, the Intergy System will load and direct the user to the New Encounter Prompt for the patient in context.





#### **Search for Available Appointment Time**

Opens the **Available Appointment Time Search** dialog box to enable you to find the best available appointment time for the patient.





#### **Appointment and Provider Legend**

Toggle the **Appointment and Provider Legend** button on/off to display the color legend for all appointment types, providers, and appointment statuses.

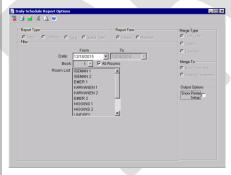




#### **Print Current Schedule**

Clicking this icon will launch the **Daily Schedule Report Options** window. You may select the appropriate date range and room lists and print the current schedule based on your selections.



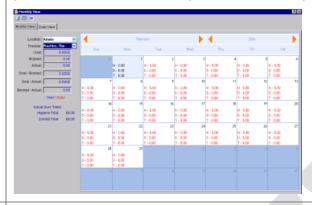




#### **Monthly Production View**

Opens the **Monthly View** window to display a monthly overview of scheduled work vs. actual produced work vs. individual provider or overall practice goals.





#### **HIPAA Cloak**

Toggle the **HIPAA Cloak** button on/off to hide/reveal all patient names on the Appointment Center screen in all appointment books and lists.



A **HIPPA Cloak Active** indicator will display in the patient lists section; no lists will be available for viewing.



### Refresh



A **Refresh** function has been added that displays (in minutes) the last time the **Appointment Center** screen was refreshed.

Appointment books are configured to refresh automatically every 3 minutes if you remain on the Appointment Center screen. If you navigate to another screen for more than 3 minutes, the Appointment Center screen will refresh when you return.

You may also refresh the screen manually by clicking the **Refresh Data** icon ( ) to the left of the time indicator.

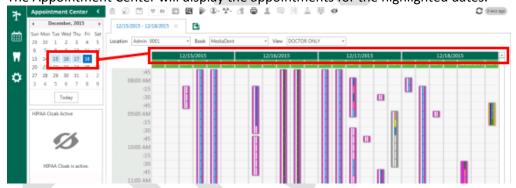


### Calendar



The **Calendar** section in the **Appointment Center** enables you to select one or more dates for viewing appointments.

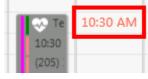
- Click on the appropriate date in the Calendar to view appointments for that date.
- To view a range of dates, click and drag your cursor to highlight the appropriate dates in the Calendar. The Appointment Center will display the appointments for the highlighted dates.



# **Patient Appointments**

# **Creating an Appointment**

1. To create an appointment, select the appropriate time unit on the Appointment Book. (The appointment time will display in red for easier selection.)

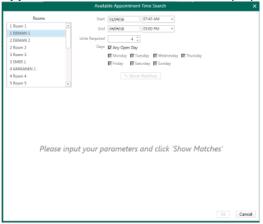


-or-

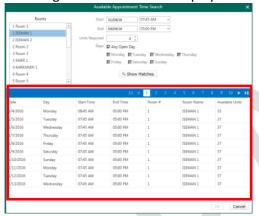
Click the Search for Available Appointment Time icon in the Appointment Toolbar. An Available



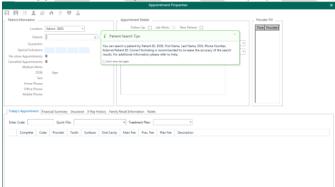
**Appointment Time Search** window displays.



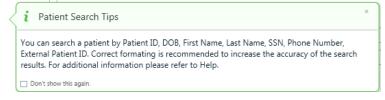
• Enter the appropriate search criteria and click **Show Matches**. A list of available appointment times matching the search criteria displays.



- Select the appropriate appointment time from the list and click OK.
- 2. The Appointment Properties window displays.



3. Search for the appropriate patient in the **Patient** field. A **Patient Search Tips** pop-up displays to provide hints on patient searches.

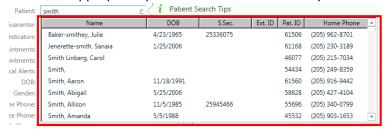




**Tip** - You may search by patient ID, DOB, first/last names, SSN, phone number, or external patient ID.

4. A list of patients matching the search criteria displays.

Select the appropriate patient from the list. You may scroll down the list to view all relevant patients.



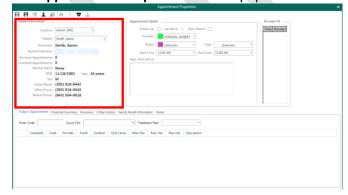
If searching for a patient returns no results, the grid will be blank.

5. If no patient is found via the search and you want to add a new patient, click the **Add Patient** icon ( ) in the toolbar. A **New Patient** dialog box displays.



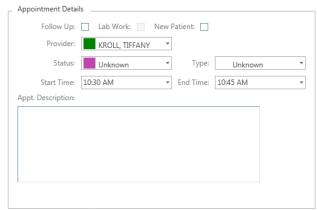
Enter the appropriate patient information (fields in **bold text** are required information) and click the **Save** icon.

6. The Appointment Properties window populates with the appropriate Patient Information for the patient.





7. Edit the appropriate information in the **Appointment Details** field.



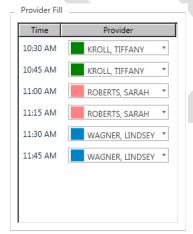
Follow Up / Lab Work / New Patient – Select (check) the appropriate checkbox.

Note - Lab work cannot be checked here. You must use the Patient Lab Case icon in order associate a lab case to this appointment. A tooltip has been added to the Lab Work checkbox to help direct the user to the icon for this release version.



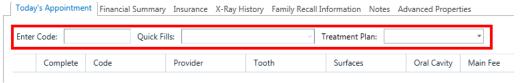
Creating the lab case will auto check the box for the user.

- **Provider** Select the appropriate provider.
- Status Select the appointment status.
- Type Select the appointment type.
- Start Time / End Time Select the appointment times.
- Appt. Description Enter an appropriate description, if needed.
- 8. For each unit within the appointment, select the appropriate provider for that time from the drop-down lists in the **Provider Fill** section. You may select one provider for all units, or multiple successive providers.





9. (Optional) On the **Today's Appointment** tab, enter any Code, Quick Fill, and Treatment Plan information for the appointment.



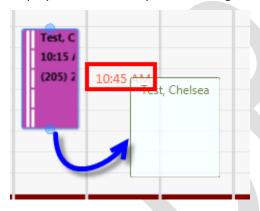
10. (Optional) On the **Notes** tab, enter any appropriate appointment notes/remarks.



11. Click **Save** ( ) in the menu ribbon to save the appointment.

# **Rescheduling an Appointment**

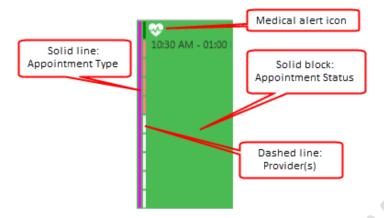
To reschedule an appointment, click and drag the appointment block to the desired time slot. Time slots will display in red to assist you in locating an appropriate slot.



Release the mouse button to position the appointment block in the new slot. The appointment time will update automatically in the repositioned block.

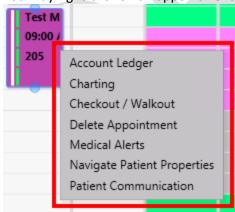


# **Viewing Appointment Block Information**



The following information is viewable on appointment blocks:

- The **solid line** on the left-hand side of the appointment block denotes the appointment type (e.g., hygiene, restorative, etc.).
- The **dashed line** to the right of the appointment type line denotes the provider(s) associated to the appointment. Each dash represents one unit of time in the appointment. You may assign multiple providers to a single appointment by selecting the appropriate providers in the Provider Fill section on the Appointment Properties page.
- The main **solid block** of the appointment denotes the appointment status (e.g., Confirmed, No Show, etc.).
- A medical alert icon will display in the upper left-hand corner of the appointment block if medical alert information exists for the patient.
- You may right-click on an appointment block to display a context menu:

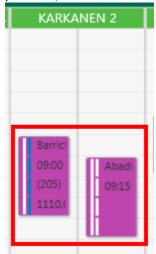


The context menu displays several window navigation options. Select the appropriate name to navigate to that particular window.



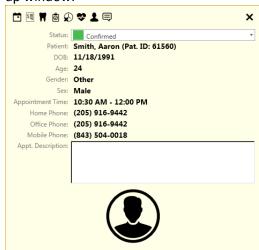
### **Overlapping Appointments**

Overlapping appointments will display side-by-side in a column in the Appointment Book for a single provider/room:



#### **Details at a Glance**

Single-clicking an appointment block displays the **Details at a Glance** information for the appointment in a popup window.



The standard Details at a Glance information is viewable (patient name, DOB, age, gender, sex, appointment time, phone numbers, and appointment description).

• Status – You may change the appointment status via the Status drop-down menu as needed.

You may access several options via the icons on the toolbar:

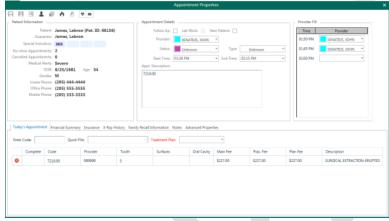
- Edit Appointment Click the Edit Appointment icon to display the Appointment Properties window and edit the appointment information.
- Account Ledger Click the Account Ledger icon to open the Account Ledger window for the selected
  patient.
- Charting Click the Charting icon to navigate to the Charting module for the selected patient.



- Walkout Click the Walkout icon to open the Checkout/Walk-Out window for the selected appointment.
- Delete Appointment Click the Delete Appointment icon to delete the selected appointment.
- **Medical Alert** Click the **Medical Alert** icon to view the patient's medical alert information. The medical alert icon will display in **red** if the alert is severe for the selected patient. If the alert is not severe, the icon will display as shown above.
- Patient Properties Click the Patient Properties icon to open the Patient Properties window for the selected patient.
- Patient Notes Click the Patient Notes icon to display the Patient Communication window and view any notes, alerts, or tasks associated to the appointment.

### **Appointment Properties**

Double-clicking an appointment block opens the **Appointment Properties** window.



From the Appointment Properties window, you may edit **Appointment Details** (status, type, description, etc.); assign providers via the **Provider Fill** section; add codes on the **Today's Appointment** tab; view **Financial Summary**, **Insurance**, **X-Ray History**, and **Family Recall information**; and add appointment or account notes on the **Notes** tab.

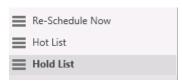
The Appointment Properties window is also accessible (in read-only format) when launched from the following menu items in Practice Navigator:

- Work Scheduled Appointments
- Work Unscheduled Appointments
- Work Hot List Appointments
- Work Hold List Appointments





# **Appointment Lists**



The **Reschedule Now, Hot List,** and **Hold List** sections on the **Appointment Center** task list may be individually displayed by clicking the expand icon ( ) on each list tab.



### Adding a Patient from a List to the Appointment Book

You may add patients from a list to the Appointment Book and vice-versa.

1. To add a patient from a list to the Appointment Book, click and drag the patient's name from the list to the appropriate appointment slot.



2. Release the mouse button to create the appointment. The name will be removed from the list.



3. To add a patient from the Appointment Book to a list, select the appointment and drag it to the appropriate list. Release the mouse button to remove the appointment and add the name to the list.

Note - You may also select the appropriate list name (Reschedule Now, Hot List, or Hold List) from the Status drop-down menu in the Details at a Glance or Appointment Properties window to add the patient to a list. Please note that if a patient is moved to a list via this method, the Status drop-down list will be disabled until you manually add the appropriate patient to the Appointment Book (via the click-and-drag method).



### **Copying a Current Appointment to a List**

You may create a copy of a current appointment on either the Hot List or Hold List by clicking the Create a copy

on Hot List ( ) or Create a copy on Hold List ( ) icon in the toolbar on the Appointment Properties window, or by selecting Hot List or Hold List on the Status drop-down list, which will automatically copy the patient to the appropriate list.



Note - An appointment may only be copied to one list or the other, not both.

The appointment will be copied to the appropriate list with a unique appointment ID for the list copy.

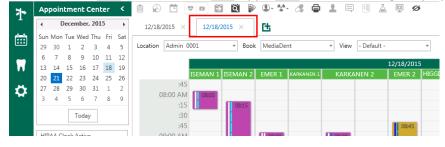


All edits made to the main appointment will be duplicated in the copy. Deleting the original appointment from the Appointment Book will also delete the copy from the list.

# **Appointment Book Tabs**

You may create multiple viewing tabs in the Appointment Book to track appointments for different locations, views, etc.

To add a view tab, click **Open New Tab** ( ) at the top of the Appointment Book to create a new tab for the same date. A new tab with the default appointment book settings displays.



You may change the view filters on the new tab via the **Location**, **Book**, and **View** drop-down lists. You may change the date displayed on the new tab via the **Calendar** date picker.

Any new tabs added to the Appointment Book will persist if you close and re-launch the Appointment Book. If multiple tabs have different dates assigned to them, the most current date tab will open first by default.



# 3 Charting

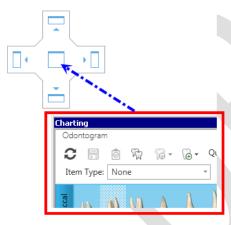
## **Charting Tabs Undockable for Multi-Monitor Setup**

Project #MD-385

All tabs in **Charting** are undockable for use on a multi-monitor setup. You may click the appropriate tab in the Charting module and drag the tab to a second monitor. The tab will display as a separate window.



To re-dock a window in the Charting window, click and drag the window to the middle square in the dock panel and release the mouse button.



The window will re-display as a tab.

Caution - PLEASE NOTE THE FOLLOWING: ASP clients <u>MUST</u> have their screen resolution set to FULLSCREEN and the Span Monitors option enabled (checked) on their HB login screen (as in the following illustration) in order for the tab undocking to function across dual monitors:

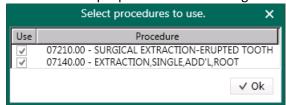


# Odontogram, New Intermediate Procedure Selection for Multi-Procedure Results

Project #MD-389

Users are now required to select the specific code/description for each distinct procedure for multi-procedure results in **Charting**.

A **Select which procedures to use** dialog box will display if you select a single tool or tool/material combination for which multiple procedures are configured.

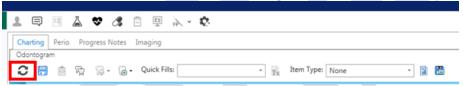


All associated procedures will be enabled for the tool or tool/material combination. You may designate the appropriate procedure code to use by deselecting (unchecking) any irrelevant code(s) in the dialog box and clicking **OK**. The remaining (selected) code will be applied to the tooth/teeth selected and display in the **Tooth Info** grid.

### Odontogram, Refresh Icon

Project #MD-383

A Refresh icon has been added to the Odontogram toolbar that enables you to refresh patient charts manually.



Clicking the **Refresh** icon will refresh only the Navigation Tree if the **Save** button is active. If the Save button is not active, clicking Refresh will update both the navigation tree and the chart itself.

# **Odontogram, Tooth Selection Focus in Tooth Info Grid**

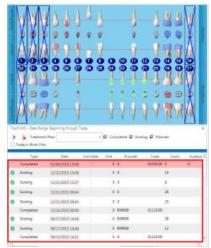
Project #MD-388

Selecting (via single-click) a tooth graphic in the **Odontogram** will display the specific work performed in the **Tooth Info** grid.





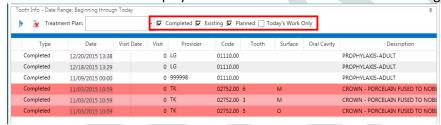
Deselecting the tooth via single-click will return the **Tooth Info** grid to its default view, **only** if a single tooth has been selected.



# **Tooth Info, Filters Saved Across Sessions**

Project #MD-384

Filter selections (Completed, Existing, Planned, and Today's Work Only) made in the Tooth Info section on the Chart tab will be saved across sessions. If a user logs out of the Charting module and logs in for a later session, the filters selected will display and filter the Tooth Info section accordingly.



# 4 Practice Navigator

# Appointments, GURCA Error Message Removed from Acquire Patient Image Function

Project #MD-411

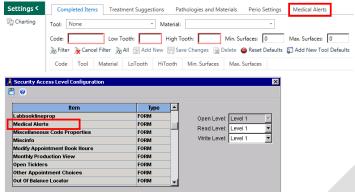
Previously, users would receive an error message if they cancelled the **Acquire Patient Photo** action in the **Appointment Book** before selecting a GURCA client through which to upload the photo. As the error message only informed the user that the action had been cancelled, the message has been removed.



# **Medical Properties Renamed**

Project #MD-592

The **Medical Properties** section in the **Charting Configuration** and **Security Access Level Configuration** screens has been renamed **Medical Alerts**.



# System Files, Prescriptions Node Renamed

Project #MD-413

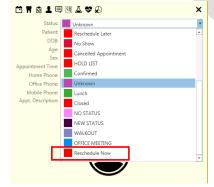
The Prescriptions node on the System Files tab in Practice Navigator has been renamed Medications.



# **Reschedule Now Added as Appointment Status**

Project #MD-588

Reschedule Now has been added as an appointment status.





When selected on a patient appointment, the appointment will be automatically moved to the **Reschedule Now** list on the Appointment Book.

### **Reschedule Now Holds Patient Context for Updated Appointment Book**

Project #MD-563

Clicking the **Reschedule Now** button for a patient from anywhere in the practice management software will launch the updated **Appointment Book** with the patient saved in memory. This enables you to schedule an appointment without re-searching for the patient in the Appointment Book.



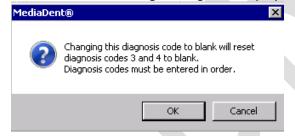
An **In Memory** indicator displays with the selected patient name/ID. To schedule the appointment, double-click the appropriate appointment slot to display the **Appointment Properties** window and enter the necessary information for the appointment as per normal.

# Walk-Out/Invoice Properties, Dx Code Entry Order Updates

Project #MD-496

Diagnosis codes selected from the **Dx Code** drop-down lists (**Dx Code 1, Code 2, Code 3,** and **Code 4**) on the **Walk-Out/Invoice Properties** window must be entered in order. A Code field will not populate until the preceding field has an entry.

In addition, changing the selection in any Code field to the **Blank** selection will clear all data in any subsequent code fields. For example, if data is present in fields **Code 1**, **2**, and **3**, and you change the value in the **Code 2** field to **Blank**, a warning message will display:



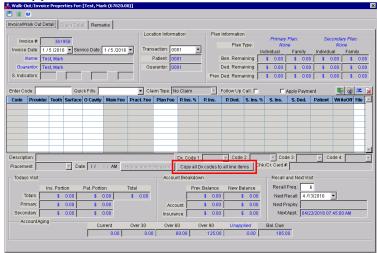
In this example, clicking **OK** will clear all data in the **Code 2** field and all subsequent fields (**Code 3** and **Code 4**). Clicking **Cancel** will retain the original code entries.



# Walk-Out/Invoice Properties, New Copy Dx Codes Function

Project #MD-386

A Copy all Dx Codes to all line items button has been added to the Walk-Out/Invoice Properties window.



Clicking this button will copy all diagnosis codes entered for the selected line item to all line items on the visit. If additional codes are added after copying has taken place, you may click the button again to copy the additional codes.

If the button is selected multiple times, any duplicate codes copied to the line items will replace the original codes in the line items.

# 5 Bug Fixes

# Age Cut Off in Charting for Patients < 1 Year

Project #MD-502

Patients under 1 year had their age value (months + days) cut off on the **Charting** screen. This has been corrected.

# **DI Launching Behind MediaDent Window**

Project #MD-573

The Digital Imaging module, when launched, was displaying behind the MediaDent window and was inaccessible to users. This has been corrected.

## **Error Accessing Right-Click Menu in Process Statements**

Project #BHMLV3MMD-683

Users received an error message when attempting to access the right-click menu on the **Process Statements** screen. This has been corrected.



### **Error Launching Charting**

Project #MD-554

Users received an error message when attempting to open the **Charting** module if no image records were associated with a savepoint record. This has been corrected.

# **Error Printing Payment Book**

Project #BHMLV3MMD-683

Users received an error message when attempting to print the Payment Book for a patient. This has been corrected.

# **Error Printing/Previewing Initial Emdeon Claim Report**

Project #BHMLV3MMD-715

Users received an error message when attempting to preview/print the Emdeon Claim Report received immediately after submitting claims. This has been corrected.

## **Error Using Word Merge**

Project #BHMLV3MMD-524

Users received an error message when attempting to use Word Merge to create a new letter, label, or envelope. This has been corrected.

# **Error Viewing Images Associated With Incomplete Mounts**

Project #MD-555

Users received an error message when attempting to view an image within an incomplete set of images for a selected mount. This has been corrected.

# **Fee Increase Not Allowing Percentage Values**

Project #BHMLV3MMD-377

Users could not enter a value higher than 9.99 in the **Percentage** field in the **Fee Increase** tool. This has been corrected.

# **Graphics Not Displayed on Existing Items Added via Quick Fill**

Project #MD-551

Graphics added via Quick Fills saved and displayed correctly on the **Odontogram** and in the **Tooth Info** section in **Charting**, but did not display when the user closed and re-launched the Charting module after switching to another patient and returning to the initial patient. This has been corrected.



# Hygienist Defaulting to "The Practice" in Charting

Project #MD-559, BHMLV3MMD-647

When users launched **Charting** from the Appointment Book after opening the **Medical History** or **Patient Communication** window via the right-click menu, or after creating a Treatment Plan, the Hygienist field defaulted to a **"The Practice"** value in Charting. This has been corrected.

### **FoxPro Driver Not Found When Using Mail Merge Reports**

Project #MD-468

Users received a message stating that the FoxPro driver could not be found when attempting to use mail merge reports. This has been corrected.

# MediaDent Not Launching After .exe Message Confirmed

Project #MD-578

When users closed and re-launched MediaDent before allowing all processes to complete, they received a message stating that the executable file was not terminating correctly; after clicking **OK** to confirm the message and attempting to launch MediaDent again, the termination processes still would not complete and MediaDent could not be launched. This has been corrected.

# **Medical Properties Displaying Wrong Patient**

Project #MD-562

When users launched the **Medical Properties** window from **Appointment Properties**, the patient displayed was different from the patient on the appointment. This has been corrected.

# Missing Policy Holder Information on ADA 2012 Form

Project #BHMLV3MMD-615

The subscriber date of birth and gender information were missing from the ADA 2012 form report for pre-tax estimates, which caused the associated claim to be rejected. This has been corrected.

# **Mounted Image Duplicating in Emails**

Project #MD-556

When users attempted to email individual images associated with a mount, the same image was being attached multiple times to a single email. This has been corrected.

# **Mounted Images Not Importing Into Progress Notes**

Project #MD-557

Users were unable to import multiple mounted images into Progress Notes, although unmounted images imported without issue. This has been corrected.



### **NEA Number Not Displaying on Claim Detail**

Project #MD-585

The NEA number generated when attachments were sent was not displaying on the invoice when patients were checked out. This has been corrected.

## **Patient Care Slip Displaying Severity Rather Than Notes**

Project #BHMLV3MMD-478

When users previewed or printed a patient care slip, the severity of the medical record was displayed in the **Medical Alerts** section instead of the **Notes** section. This has been corrected.

# Patient Does Not Exist Prompt When Opening Account Patient Alerts/Tasks

Project #MD-561

Users received a "Patient does not exist" message when attempting to open Patient Alerts/Tasks within the Account node for a patient. This has been corrected.

### Perio Graphical Analysis Tab Not Available in Comparative Mode

Project #MD-596

The Graphical Analysis tab will not be available in Comparative mode for perio charts.

# **Practice Navigator Displays After Adding Medication**

Project #BHMLV3MMD-542

When users added a medication to a patient's record in the **Appointment Book**, the system redirected the user to the **Practice Navigator** screen. This has been corrected.

# Problems Viewing Provider Properties From Within the Provider List When Opened from Patient Properties

Project #BHMLV3MMD-74

When users searched for a provider in the Provider List after opening the list from **Patient Properties**, the **Provider Properties** screen was not accessible. This has been corrected.

### **Tasks Not Displaying in Open Tasks Window**

Project #MD-560

When users added a new task from the **Patient Alerts/Tasks** window within a patient's Account node, the task did not display in the **Open Tasks** list. This has been corrected.



# Unable to Delete Treatment Templates and Tx/Chart Remarks

Project #MD-582

The **Delete** function was disabled when users attempted to delete an existing treatment template or remark. This has been corrected.

