Greenway MediaDent / Version 11.20

# MediaDent Release Notes Version 11.20

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# Revision History

**1/24/17**

- Original draft created.

**2/1/17**

- Updates to **Encrypted SecureMail Functionality**.

**2/8/17**

- Added **Digital Imaging** update for new VaTech HD sensor.

**2/28/17**

- Updates to **Merging Patient Records** regarding the selection of target and duplicate patients.
- Updates to **Practice Config, Updates to Diagnosis Coding Configuration** regarding the additional option of contacting Greenway Support to synchronize all fee schedules to the diagnosis prompt.

**3/10/17**

- Added **Practice Config, New Launch Screen Option** item in **System Administration**.
- Draft status removed.


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# Overview

The following summary highlights some of the new features, enhancements, and changes contained in MediaDent version 11.20:

- **Chart Email Attachments** – Users may now insert progress notes, macros, and images into outgoing emails as attachments.
- **Secure Email** – All emails sent through MediaDent will now be encrypted by default. Enhancements include procedures for creating user MediaDent SecureMail accounts.
- **Chart Imaging** – The **Export Images, Print Images,** and **Image Selection** windows have been reorganized for more clarity.
- **Moving Chart Images** – Images in **Chart** may be moved from one patient's record to another.
- **System Administration Practice Configuration** – A **Practice Config** section has been added to the **System Administration** module in the **MediaDent Console**. All configuration options previously located in **System Files → Practice Control Info → Practice Info** have been migrated to this screen; the **Practice Information** screen has been removed from **System Files**.
- **Utilities** – A new **Utilities** module has been added that enables users to merge duplicate patient records into a single record.


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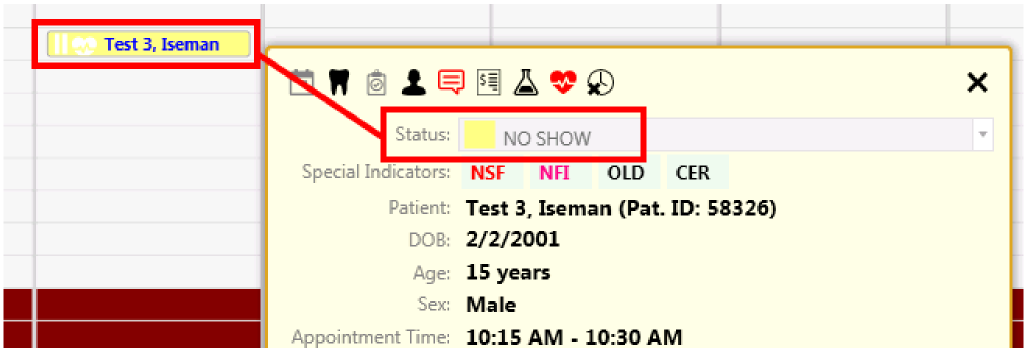
# 1 | New Features/Enhancements

## Appointment Center

### Changes to No-Show/Broken Appointments

**Project #B-49736, B-54489**




The following changes have been made to no-show/broken appointments on the Appointment Book.

- Appointments whose status has been changed to **No Show** will now remain on the **Appointment Book** and display the **No Show** color in the appointment slot. No-show appointments will no longer be removed from the Appointment Book.
- If a user selects to use a previously scheduled No Show appointment when scheduling a future appointment, a copy of the original No Show appointment will remain on the appointment book for future reference.

## Chart

### Chart Optimization

**Project #B-49679**

Enhancements have been made to the **Chart** module to improve efficiency and performance.

### Email Enhancements

**Project #B-50469, B-49701, B-49769, B-51236, B-51249**


An **Email** icon has been added to the main navigation bar in the **Chart** module that enables users to create and send emails from anywhere in the **MediaDent Console**. The **Email** icon is enabled as long as a patient is in context on screen.



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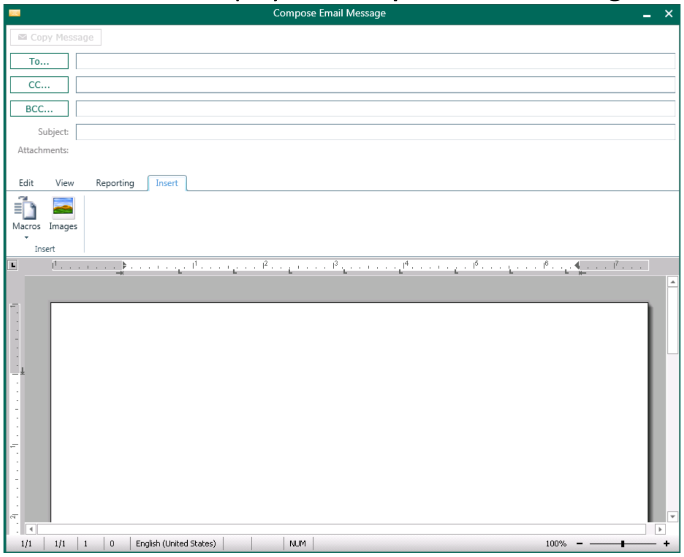
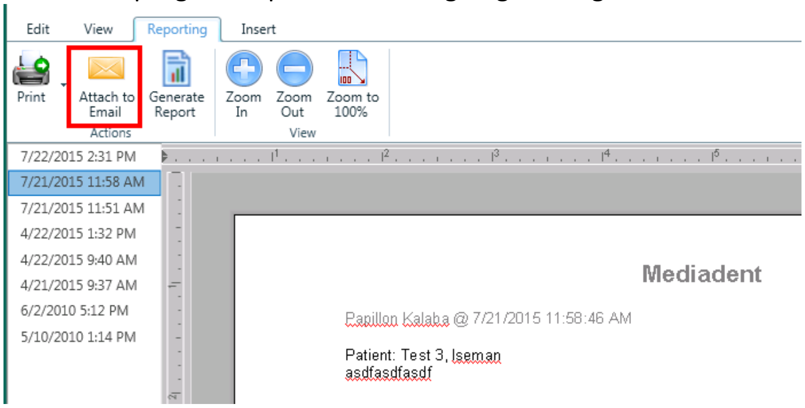
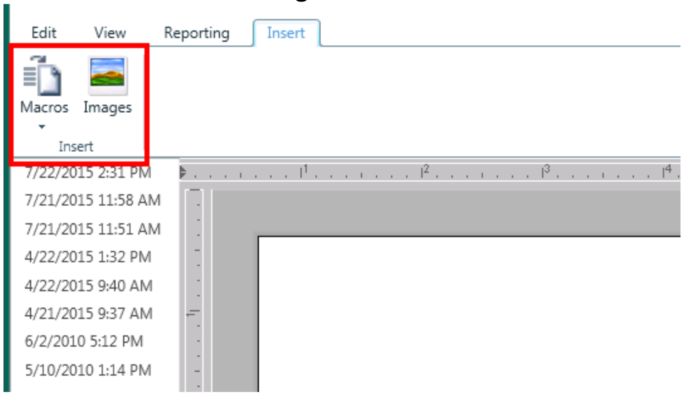
1. Click the icon to display the **Compose Email Message** window.




2. To send an email, enter the email address or addresses in the appropriate fields (**To, Cc…,** and **Bcc…**).
3. Enter a **Subject** and enter the appropriate content in the body of the email.
4. To attach a progress note to an email:
   - Select the **Reporting** tab.
   - Select the date/time of the appropriate progress note, click **Generate Report**, and click **Attach to Email** to add the progress report to the outgoing message.




5. To insert a macro or image into an email:




   - Select the **Insert** tab.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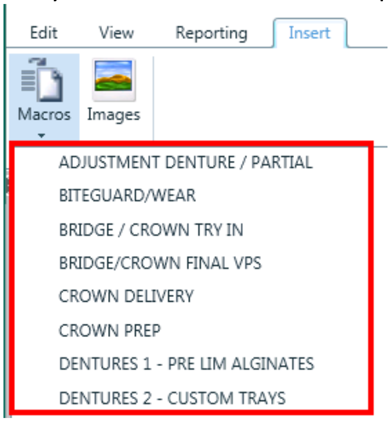
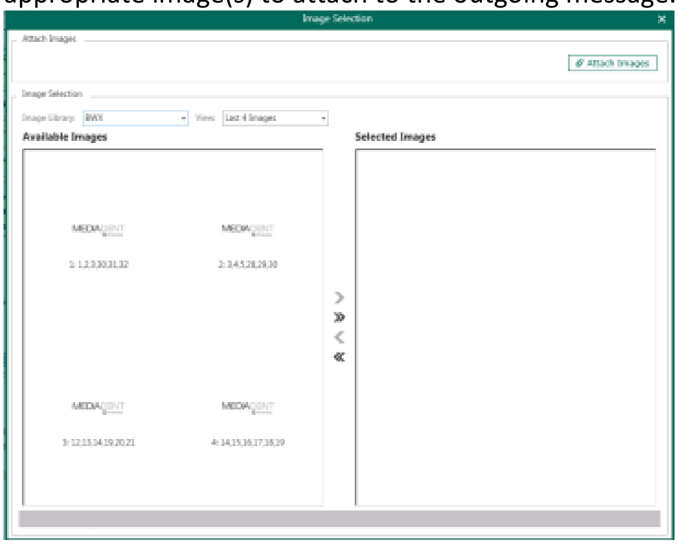
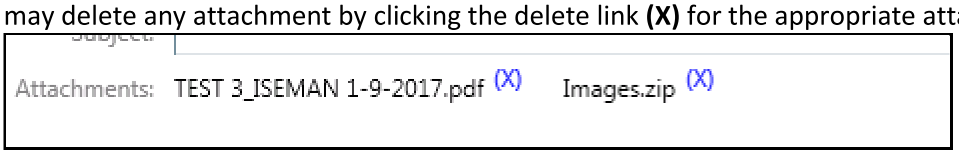
- To insert a macro, select the appropriate macro(s) from the **Macros** drop-down list to insert it into the body of the email at the cursor point.



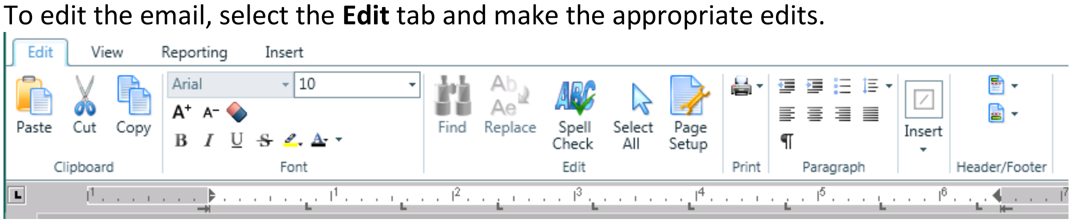

- To insert an image, select the **Images** icon to launch the **Image Selection** window and select the appropriate image(s) to attach to the outgoing message.




6. All attachments may be viewed in the **Attachments** field on the **Compose Email Message** window. Users may delete any attachment by clicking the delete link **(X)** for the appropriate attachment.




7. To edit the email, select the **Edit** tab and make the appropriate edits.





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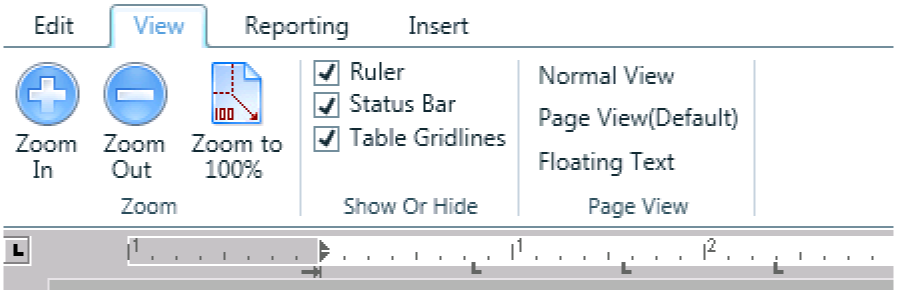
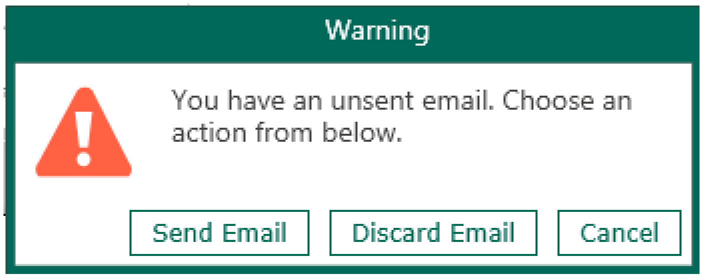
To change the view for the email, select the **View** tab and adjust the view as needed.




8. Click **Send Message** to send the email.

**Note - If a user switches to a different patient before sending an email, a Warning message displays indicating that an unsent email exists.**




**Users may click Send Email to send the message, Discard Email to delete the message, or Cancel to cancel and return to the original patient.**

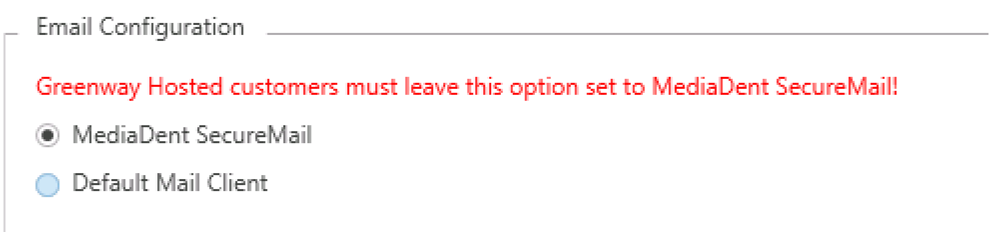
# Encrypted SecureMail Functionality

**Project #B-50474, B-50425, B-51246**

All emails sent through MediaDent will now be encrypted by default. Users will need to create a MediaDent SecureMail account to read all MediaDent-generated emails.

## Configuring Email Accounts

A new **Email Configuration** option on the **Misc** tab in **System Administration** enables clients to configure their system to use MediaDent SecureMail.




The **MediaDent SecureMail** option is selected by default. Users may select the **Default Email Client** option if their in-house email system encrypts emails in compliance with HIPAA regulations.

**Caution - MediaDent SecureMail is HIPAA compliant and secure for sending patient data in accordance with all relevant regulations. Selecting the Default Email Client option displays a warning message regarding the status of external email servers:**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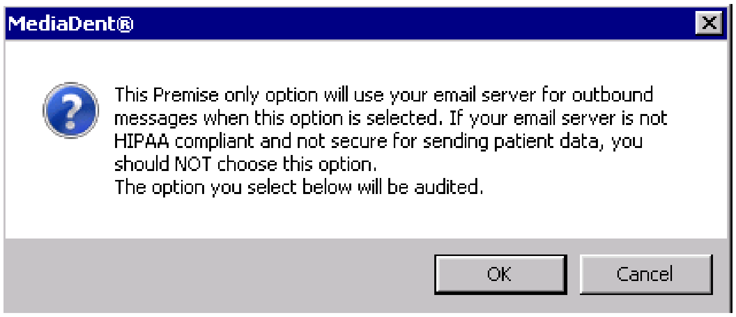
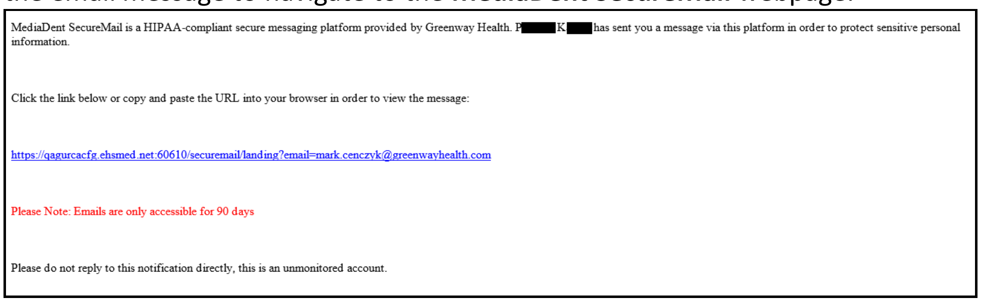


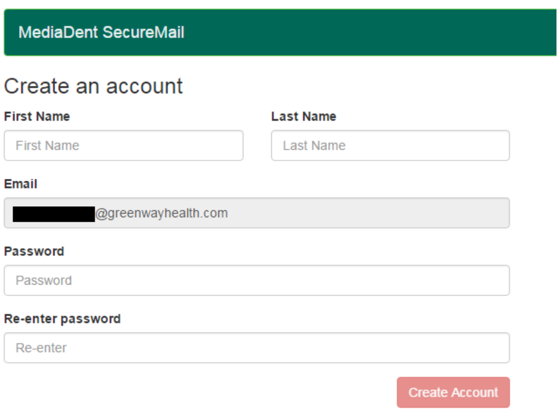

**Hosted clients should use MediaDent SecureMail for all outbound messages. Do not select the Default Email Client option if your server is not HIPAA compliant and not secure for sending patient data.**

## Creating a MediaDent SecureMail Account

First-time SecureMail recipients will need to create a MediaDent SecureMail account.

1. When you receive an email indicating a SecureMail message is waiting for you, click the link in the body of the email message to navigate to the **MediaDent SecureMail** webpage.




2. Enter your **First Name**, **Last Name**, a **Password** for your email account, and **Re-enter Password**.
3. Click **Create Account**. A screen displaying all secure emails displays.



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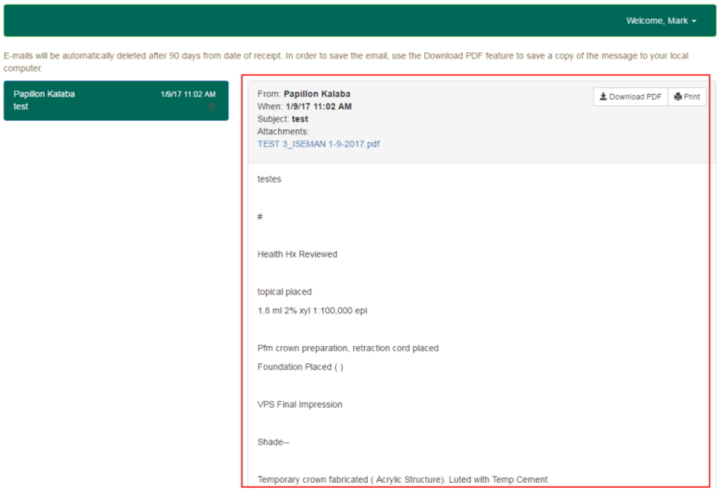
4. Select the appropriate email message in the left-hand column to read it. The message will display in the right-hand column.




5. Click **Download PDF** to download the message in PDF format, or **Print** to print a copy of the message.

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**Note - Emails will <u>automatically be deleted</u> after 90 days from the date of receipt.**

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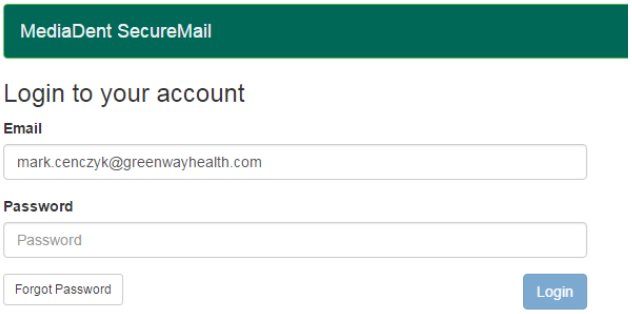
6. Once your SecureMail account has been created, links to all future emails will navigate you to the main SecureMail login page.




To access secure emails, enter your **Email** and **Password** and click **Login**.

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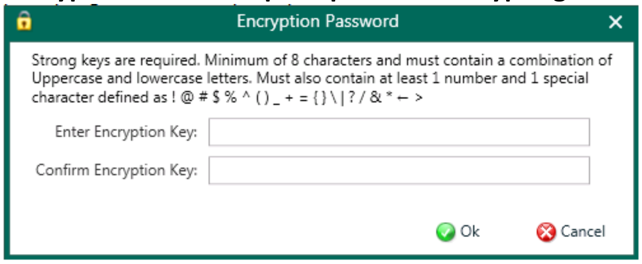
**Note - With the introduction of encrypted email for all MediaDent messages, users will no longer receive the Encryption Password prompt when encrypting an email through the MediaDent application.**

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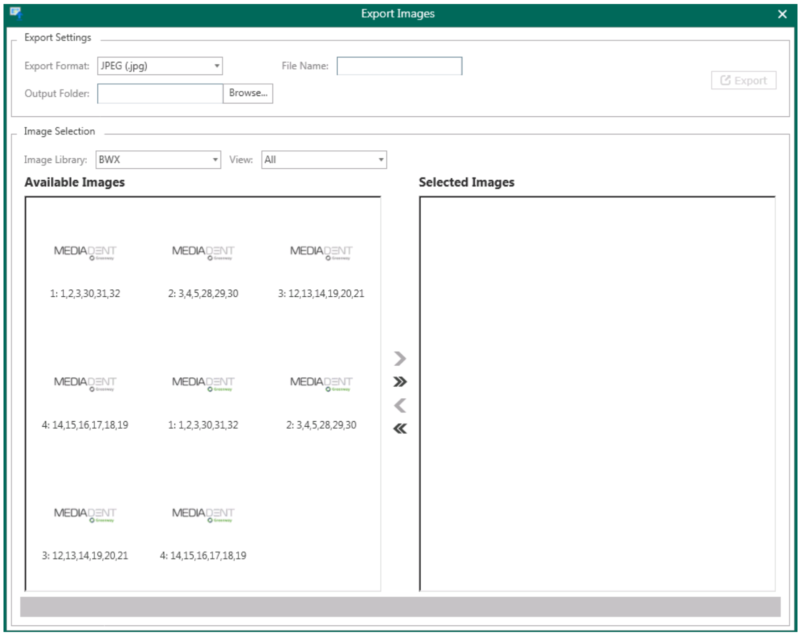
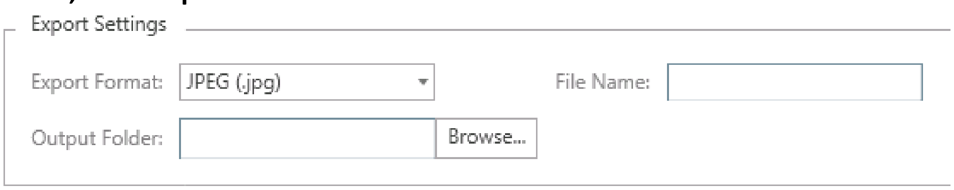
# Imaging Tab, Changes to Export Images Window

**Project #B-49700**

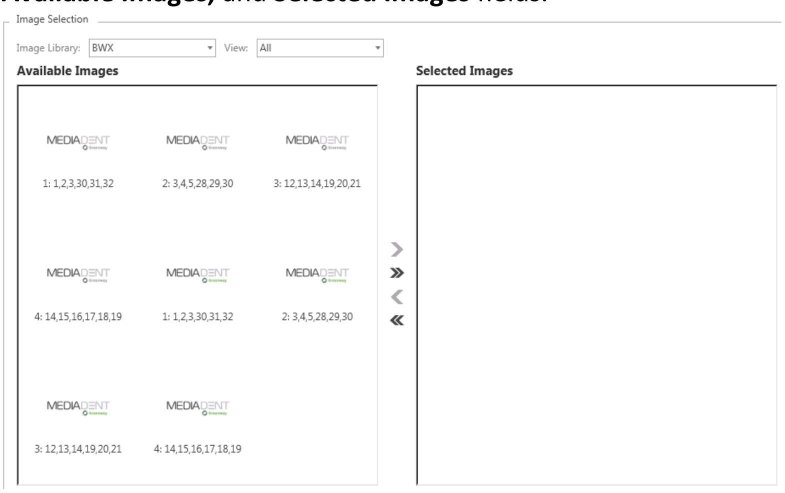



The layout of the **Export Images** window has been modified as follows:

- **Export Settings** – A new **Export Settings** section has been added that houses the **Export Format, File Name,** and **Output Folder** fields.




- **Image Selection** – A new **Image Selection** field houses the **Image Library, View** (formerly Filter)**, Available Images,** and **Selected Images** fields.




- **Drag-and-Drop** – Users may select an image for export by clicking the appropriate image in the **Available Images** field and dragging it to the **Selected Images** field, and vice versa. (Users may also use the arrows to move images back and forth between the fields.)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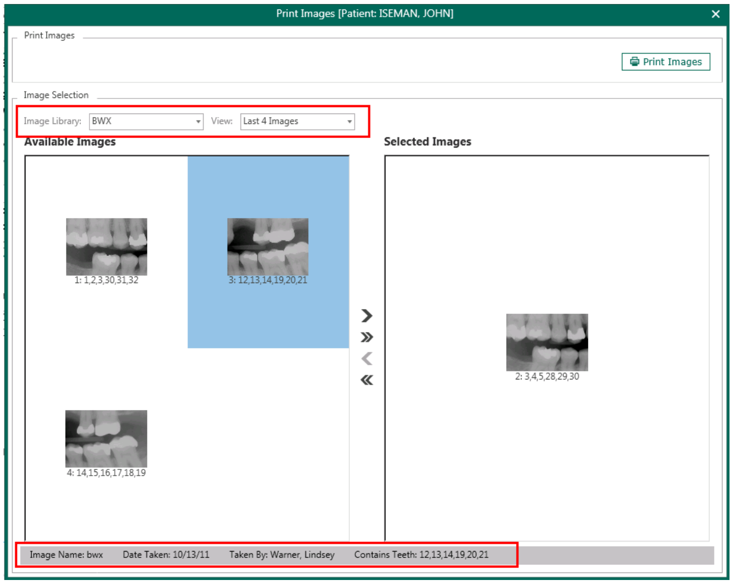
# Imaging Tab, Changes to Print Images Window

**Project #B-53441**




The layout of the **Print Images** window has been modified as follows:

- **Image Selection** – A new **Image Selection** field houses the **Image Library** and **View** (formerly Filter) fields.


- **Image Information** – The **Image Name, Date Taken, Taken By,** and **Contains Teeth** fields have been moved to an information bar below the **Available Images** and **Selected Images** fields. Information is displayed by single-clicking the appropriate image.
- **Drag-and-Drop** – Users may select an image for export by clicking the appropriate image in the **Available Images** field and dragging it to the **Selected Images** field, and vice versa. (Users may also use the arrows to move images back and forth between the fields.)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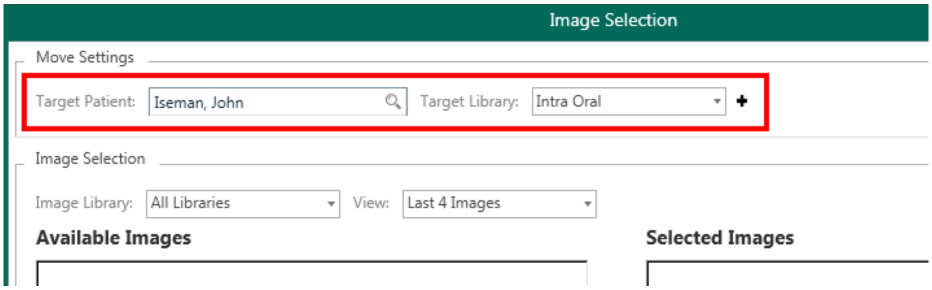
# Imaging Tab, Images Movable Between Patients

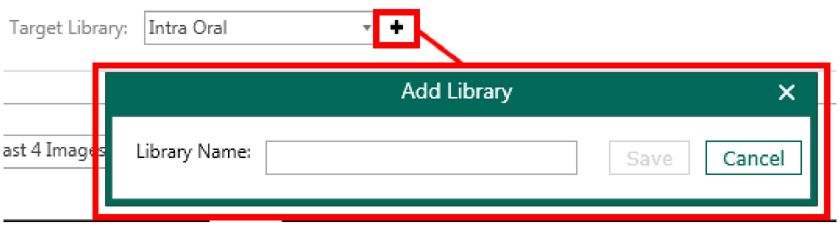
**Project #B-53438**




Users may move images from one patient to another via the **Move Images** option on the **Imaging** tab.

When the user clicks **Move Images** on the Imaging toolbar, the **Image Selection** window displays with (new) **Move Settings**. Users may select the appropriate **Target Patient** and **Target Library** and move the appropriate image(s) per the normal method.

Users may add another folder in the Target Library by clicking the **+** icon and creating the appropriate folder via the **Add Library** dialog box.



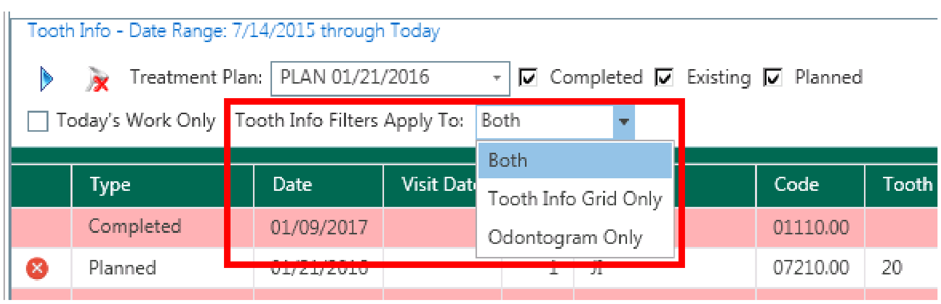

# Meds Icon Selection Launches Medications Within Chart (SuccessEHS Integrated)

**Project #B-49705**

For SuccessEHS Integrated users, clicking the **Medications** icon on the main **Chart** navigation ribbon will now launch the **Medications** tab within the SuccessEHS **Chart** module (as opposed to a standalone Medications screen).

# Odontogram, New Filter for Graphical Analysis

**Project #B-49687**




A **Tooth Filters Apply To** option has been added to the **Tooth Info** grid in the **Odontogram** that enables users to maintain the current view when other filters (**Completed, Existing, Planned, Today's Work Only**) are enabled.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You may select the appropriate scenario for which the **Tooth Info** filters operate:

- **Both** (default) – Tooth Info filters apply to both the Odontogram and the Tooth Info grid
- **Tooth Info Grid Only** – Tooth Info filters apply only to the Tooth Info grid; the Odontogram view will not change
- **Odontogram Only** – Tooth Info filters apply only to the Odontogram; the Tooth Info grid view will not change

These preferences are also in effect for Blank Charts.

# Patient Search Modifications

**Project #B-49731**

The rules for patient searches have been modified as follows:

**Patient Name Search**

- Patient searches by name will be performed as a "begins with" search for both the first name and last name.

  **Example:** if you enter **Thomas** in a search field, the system will search for all first and last names beginning with **Thomas** and display those results.

**Patient ID Search**

- Patient searches by ID number will be performed as follows:
  - If an ID number is entered that is an **exact match**, only the patient that matches the ID number entered will display as the search result.
  - If an ID number is entered that is **not an exact match**, the system will search for the number in all available numerical fields and display those results.

    **Example:** If you enter **1234** in a search field and that ID number is not matched to a patient, the system will search for all number strings with 1234 (ID, SSN, phone number, etc.) and display those results.


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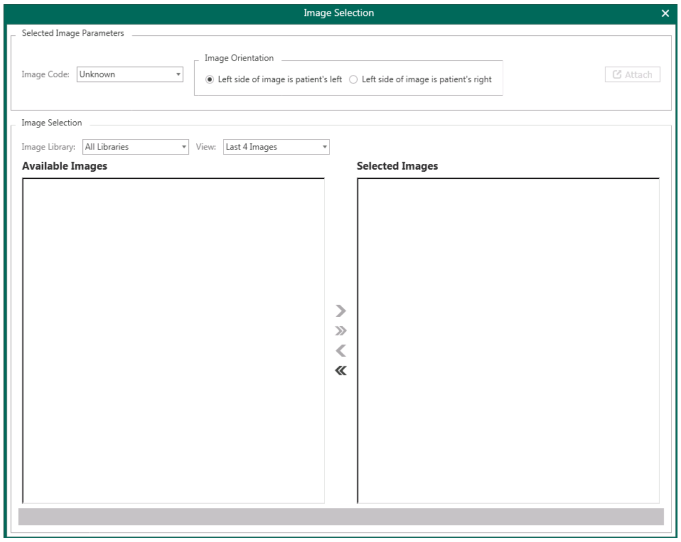
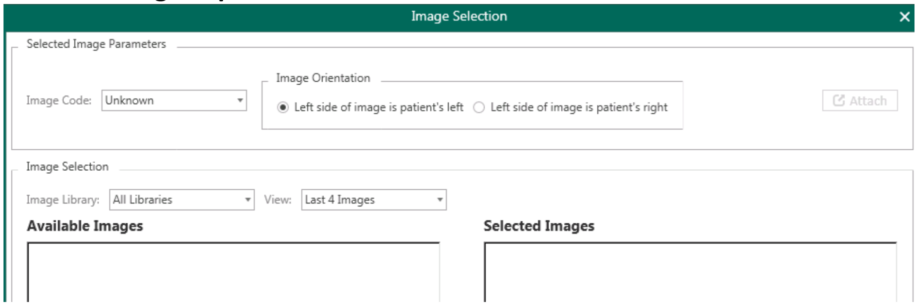
## Walkout, New Image Selection Menu for NEA Attachments

**Project #B-53439**




A new **Image Selection** window has been added to the **NEA Attachment Requirements** window that replaces the **NEA Image Export** window.




- **Selected Image Parameters** – This section houses the **Image Code** and **Image Orientation** controls.
- **Image Selection** – This section houses the **Image Library, View** (formerly **Filter**), **Available Images**, and **Selected Images** fields.
- **Drag-and-Drop** – Users may select an image for export by clicking the appropriate image in the **Available Images** field and dragging it to the **Selected Images** field, and vice versa. (Users may also use the arrows to move images back and forth between the fields.)

# Digital Imaging

## Support for VaTech HD Sensor

**Project #B-50744**

Digital Imaging has been updated to support the new VaTech HD sensor.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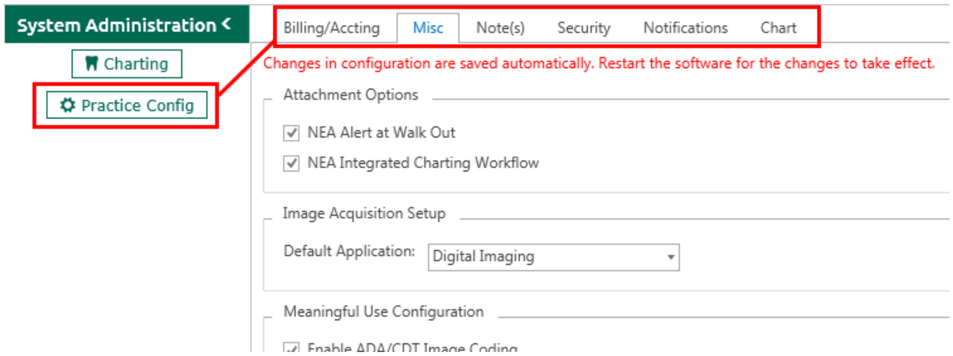
# System Administration

## Practice Configuration Migrated to System Administration in MD Console

**Project #B-49768, B-54406**



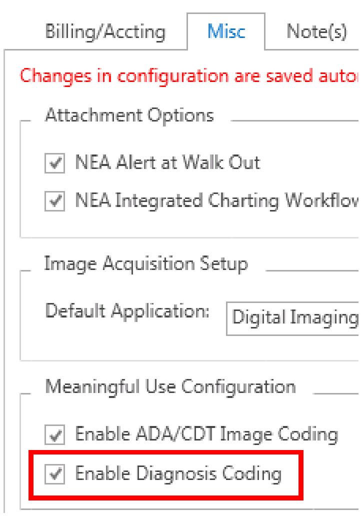

A **Practice Config** section has been added to the **System Administration** module in the **MediaDent Console**.

All configuration options previously located in **System Files → Practice Control Info → Practice Info** have been migrated to this screen; the **Practice Information** screen has been removed from **System Files**.

- The **System Admin** section/tab has been renamed **Security**.
- The **Misc** tab will display by default when users access the **Practice Config** section.

## Practice Config, Updates to Diagnosis Coding Configuration

**Project #B-51657**




The **Enable Diagnosis Coding** option under **Meaningful Use Configuration** on the **Misc** tab on the **Practice Configuration** window in **System Administration** has been updated to prompt  users in **Chart <u>ONLY</u>** if certain diagnosis codes are configured “prompt for Dx” **Fee Schedules**.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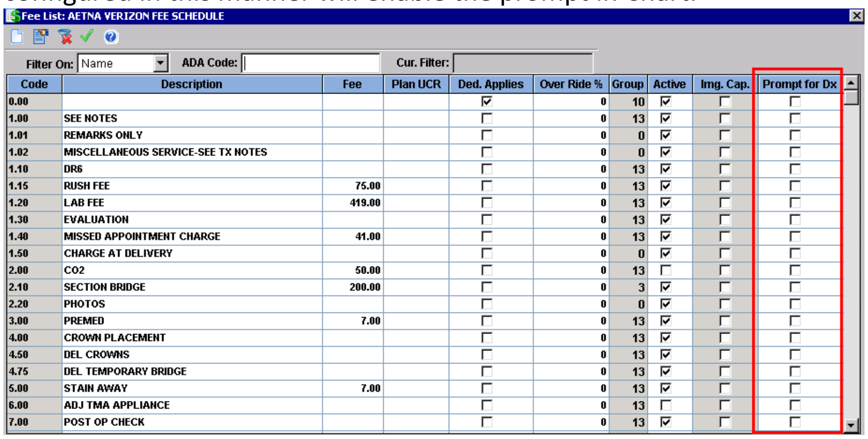
- Enabling (checking) this option directs the system to view each diagnosis code in Chart to see if it has been configured in **Fee Schedules** to display a prompt. If the code is set to prompt and is marked Completed, the prompt will display.
- Disabling (unchecking) this option will <u>not</u> direct the system to search diagnosis codes for the prompt setting.
- Users may set diagnosis codes to display a prompt in Chart by selecting (checking) the (new) **Prompt for Dx** checkbox on the **Fee List** window in **Fee Schedules** for the appropriate codes. Codes that are configured in this manner will enable the prompt in Chart.




| Code | Description | Fee | Plan UCR | Ded. Applies | Over Ride % | Group | Active | Img. Cap. | Prompt for Dx |
|---|---|---|---|---|---|---|---|---|---|
| 0.00 | | | | ☑ | 0 | 10 | ☑ | ☐ | ☐ |
| 1.00 | SEE NOTES | | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 1.01 | REMARKS ONLY | | | ☐ | 0 | 0 | ☑ | ☐ | ☐ |
| 1.02 | MISCELLANEOUS SERVICE-SEE TX NOTES | | | ☐ | 0 | 0 | ☑ | ☐ | ☐ |
| 1.10 | DR6 | | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 1.15 | RUSH FEE | 75.00 | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 1.20 | LAB FEE | 419.00 | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 1.30 | EVALUATION | | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 1.40 | MISSED APPOINTMENT CHARGE | 41.00 | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 1.50 | CHARGE AT DELIVERY | | | ☐ | 0 | 0 | ☑ | ☐ | ☐ |
| 2.00 | CO2 | 50.00 | | ☐ | 0 | 13 | ☐ | ☐ | ☐ |
| 2.10 | SECTION BRIDGE | 200.00 | | ☐ | 0 | 3 | ☑ | ☐ | ☐ |
| 2.20 | PHOTOS | | | ☐ | 0 | 0 | ☑ | ☐ | ☐ |
| 3.00 | PREMED | 7.00 | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 4.00 | CROWN PLACEMENT | | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 4.50 | DEL CROWNS | | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 4.75 | DEL TEMPORARY BRIDGE | | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 5.00 | STAIN AWAY | 7.00 | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |
| 6.00 | ADJ TMA APPLIANCE | | | ☐ | 0 | 13 | ☐ | ☐ | ☐ |
| 7.00 | POST OP CHECK | | | ☐ | 0 | 13 | ☑ | ☐ | ☐ |

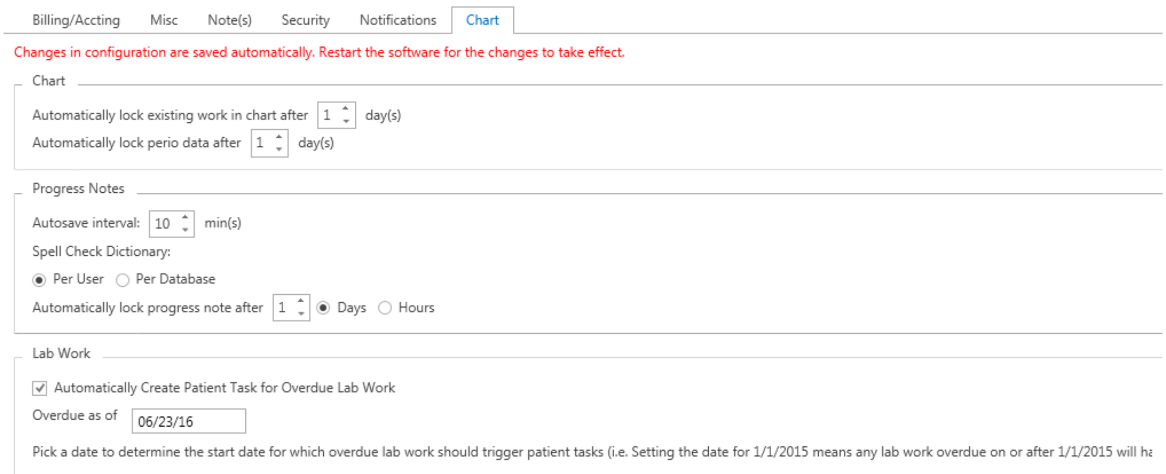
If the practice does not want a warning in **Chart** when an item is marked completed, <u>do not</u> configure the fee schedule as such.

  – Users may, after selecting the **Prompt for Dx** option, contact Greenway Support to have all of their fee schedules synchronized to the diagnosis prompting.

**Note - This setting still applies to the Walkout screen; if users need warnings in Walkout, this setting should remain checked.**

# Practice Config, New Chart Tab

## Project #B-54403, B-54407




A **Chart** tab has been added to the **Practice Config** screen in **System Administration**.

The following configuration settings are available on the tab: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## Chart

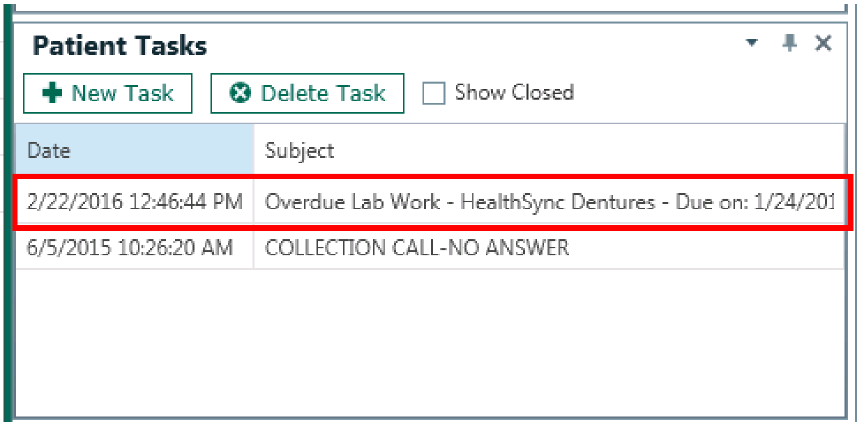
- **Automatically lock existing work in chart after ___ day(s)** – Enables users to set a time limit after which any Existing work on a patient's chart is frozen and cannot be edited.
- **Automatically lock perio data after ___ day(s)** – Enables users to set a time limit after which any perio data on a patient's chart is frozen and cannot be edited.

## Progress Notes

- **Autosave interval** – Enables users to set a timeframe for auto-saving progress notes.
- **Spell Check Dictionary** – Enables users to select whether the spell check dictionary is in effect **Per User** or **Per Database**.
- **Automatically lock progress note after ___ Days/Hours** – Enables users to set a time limit after which progress notes are frozen and cannot be edited.

## Lab Work

- **Automatically Create Patient Task for Overdue Lab Work** – Enables users to establish a date in the **Overdue as of** field after which all overdue lab work will automatically generate a task on the **Patient Tasks** section of the **Patient Communication** screen.




**Note -** *Only one task will be created per overdue lab item.*

If the lab work is marked as **Received**, the task will be automatically deleted.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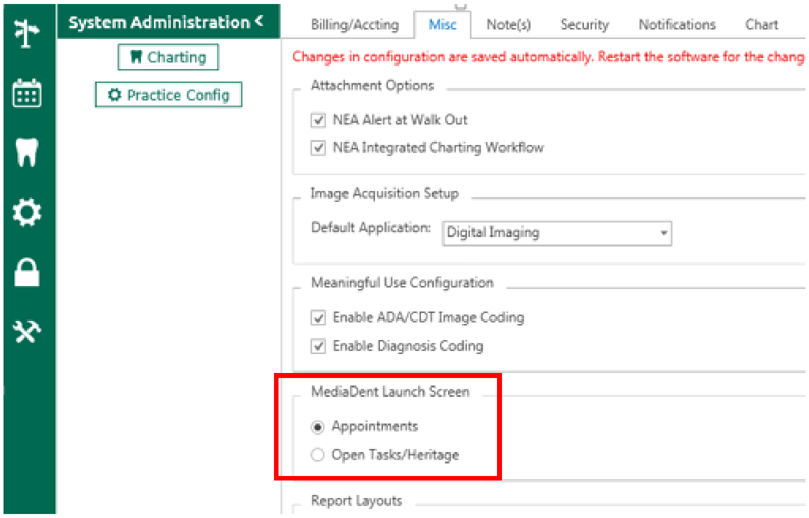
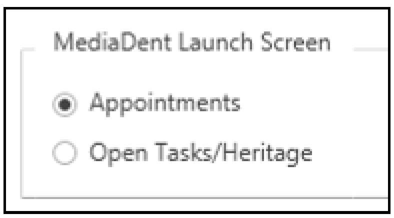
# Practice Config, New Launch Screen Option

**Project #B-49768**



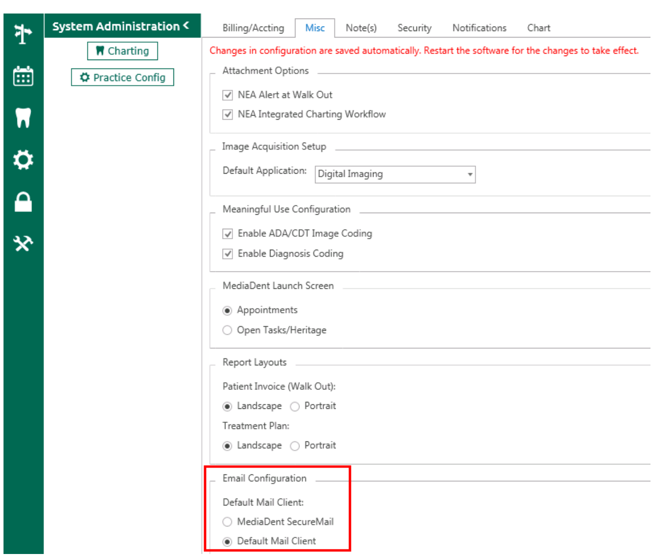

A **MediaDent Launch Screen** section has been added to the **Misc** tab on the **Practice Config** screen in **System Administration** that enables users to select which screen displays upon initial login to MediaDent.




Clients may select the **Appointments** or **Open Tasks/Heritage** screen to display when they first log in to MediaDent.

# Practice Config, New Default Mail Client Option (Premise Clients Only)

**Project #B-51252**





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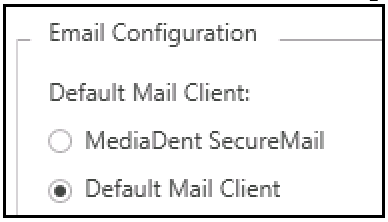
**Note - This feature is for Premise clients only.**

A **Default Email Client** section has been added to the **Misc** tab on the **Practice Config** screen in **System Administration** for transmitting secure emails.




Clients may select the **MediaDent SecureMail** (default) or their **Default Mail Client** as the system by which emails will be transmitted/received.

- Selecting the **Default Email Client** option will change the **Email** icon to a **Copy Email** icon. Clicking the **Copy Email** icon will copy the subject, recipient, body, and any attachments of the email to the client's default email screen (as if the email was sent directly from the client's email).

**Note - The Default Email Client selection is only enabled if an external mail client has been configured in System Files.**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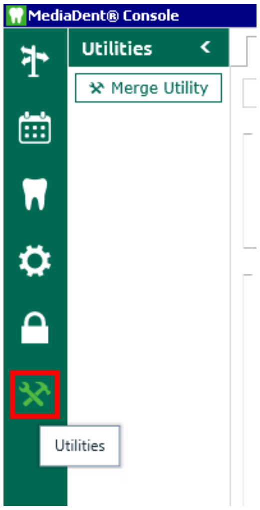
# Utilities (new)

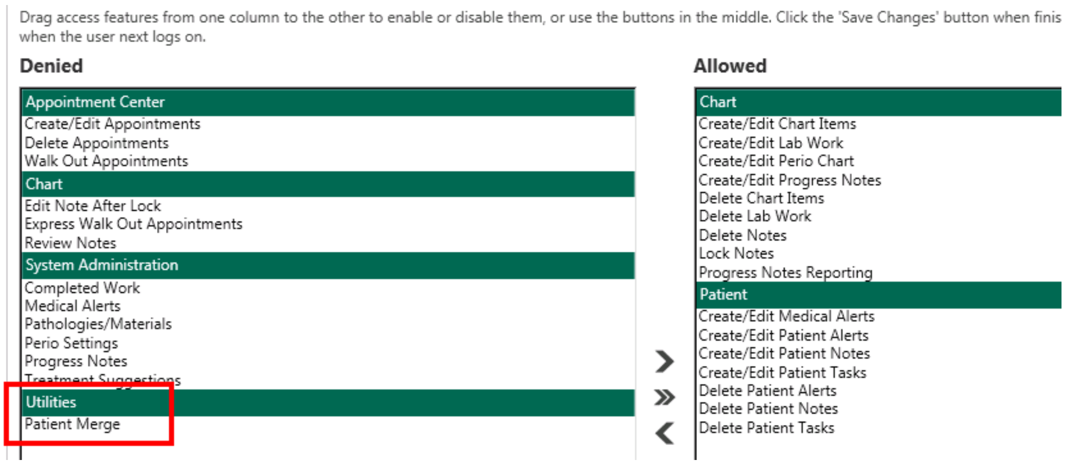
A **Utilities** module has been added to the **MediaDent Console** that enables users to perform several tasks related to patient records.




## Merge Utility

The new Merge Utility enables users to merge duplicate patient records into a single record.

### Configuring Security Access




Access to the Merge Utility may be configured at the role level or the user level in **Security**.

A **Patient Merge** access feature option has been added to the **Role Level Configuration** and **User Level Configuration** screens. Users may move the **Patient Merge** option from the **Denied** column to the **Allowed** column to enable the utility at the role or user level.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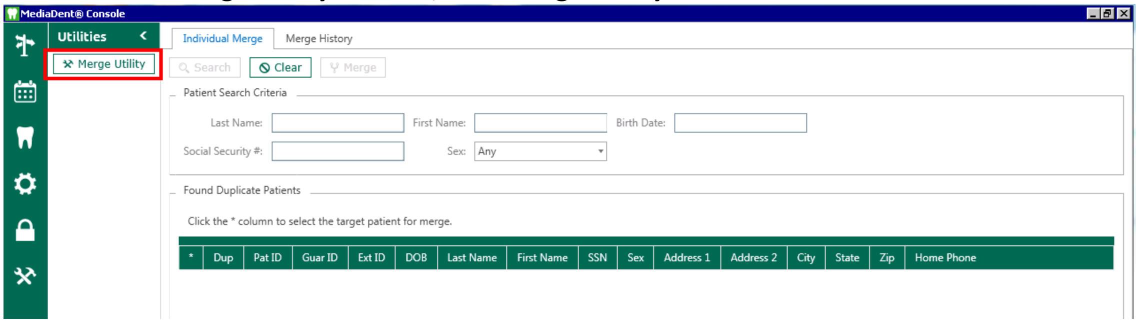
## Accessing the Merge Utility Window

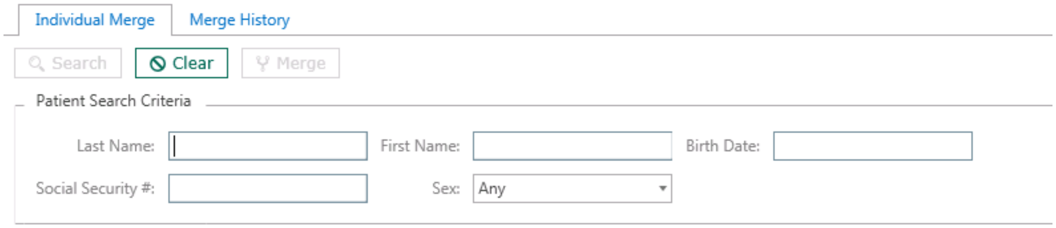
To access the **Merge Utility** window, click **Merge Utility** on the **Utilities** window.




## Merging Patient Records

To merge duplicate patient records into a single record:

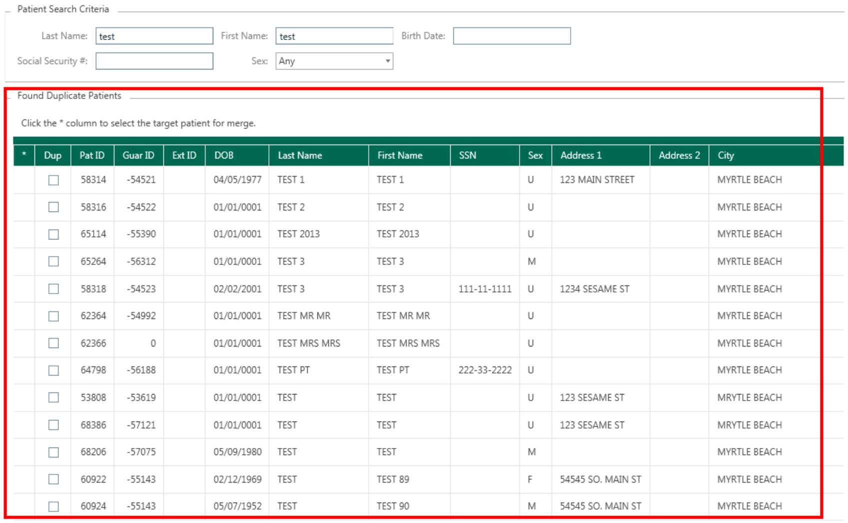
1. Search for the appropriate patient on the **Individual Merge** tab.




- Enter the appropriate search criteria in the **Patient Search Criteria** field. You may search by last name, first name, birth date, SSN, sex, or a combination of these.

  **Note -** *At least one search criteria must be entered to perform the search.*

- Click the **Search** button. (To clear the search field, click **Clear**.) A list of all patient records matching the search criteria displays on the **Found Duplicate Patients** grid.




| * | Dup | Pat ID | Guar ID | Ext ID | DOB | Last Name | First Name | SSN | Sex | Address 1 | Address 2 | City |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ☐ | 58314 | -54521 | | 04/05/1977 | TEST 1 | TEST 1 | | U | 123 MAIN STREET | | MYRTLE BEACH |
| | ☐ | 58316 | -54522 | | 01/01/0001 | TEST 2 | TEST 2 | | U | | | MYRTLE BEACH |
| | ☐ | 65114 | -55390 | | 01/01/0001 | TEST 2013 | TEST 2013 | | U | | | MYRTLE BEACH |
| | ☐ | 65264 | -56312 | | 01/01/0001 | TEST 3 | TEST 3 | | M | | | MYRTLE BEACH |
| | ☐ | 58318 | -54523 | | 02/02/2001 | TEST 3 | TEST 3 | 111-11-1111 | U | 1234 SESAME ST | | MYRTLE BEACH |
| | ☐ | 62364 | -54992 | | 01/01/0001 | TEST MR MR | TEST MR MR | | U | | | MYRTLE BEACH |
| | ☐ | 62366 | 0 | | 01/01/0001 | TEST MRS MRS | TEST MRS MRS | | U | | | MYRTLE BEACH |
| | ☐ | 64798 | -56188 | | 01/01/0001 | TEST PT | TEST PT | 222-33-2222 | U | | | MYRTLE BEACH |
| | ☐ | 53808 | -53619 | | 01/01/0001 | TEST | TEST | | U | 123 SESAME ST | | MRYTLE BEACH |
| | ☐ | 68386 | -57121 | | 01/01/0001 | TEST | TEST | | U | 123 SESAME ST | | MRYTLE BEACH |
| | ☐ | 68206 | -57075 | | 05/09/1980 | TEST | TEST | | M | | | MYRTLE BEACH |
| | ☐ | 60922 | -55143 | | 02/12/1969 | TEST | TEST 89 | | F | 54545 SO. MAIN ST | | MYRTLE BEACH |
| | ☐ | 60924 | -55143 | | 05/07/1952 | TEST | TEST 90 | | M | 54545 SO. MAIN ST | | MYRTLE BEACH |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2. Select (check) the appropriate checkbox(es) in the **Dup** column to indicate all potential patient records to be merged.

| * | Dup | Pat ID | Guar ID | Ext ID | DOB | Last Name | First Name | SSN | Sex | Address 1 | Address 2 | City |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ☐ | 58314 | -54521 | | 04/05/1977 | TEST 1 | TEST 1 | | U | 123 MAIN STREET | | MYRTLE BEACH |
| | ☐ | 58316 | -54522 | | 01/01/0001 | TEST 2 | TEST 2 | | U | | | MYRTLE BEACH |
| | ☐ | 65114 | -55390 | | 01/01/0001 | TEST 2013 | TEST 2013 | | U | | | MYRTLE BEACH |
| | ☑ | 65264 | -56312 | | 01/01/0001 | TEST 3 | TEST 3 | | M | | | MYRTLE BEACH |
| | ☑ | 58318 | -54523 | | 02/02/2001 | TEST 3 | TEST 3 | 111-11-1111 | U | 1234 SESAME ST | | MYRTLE BEACH |

3. Select the target patient (i.e., the patient record that you want to keep) by clicking in the ***** column to designate the appropriate record as the target patient. An asterisk (*****) will display in the column.

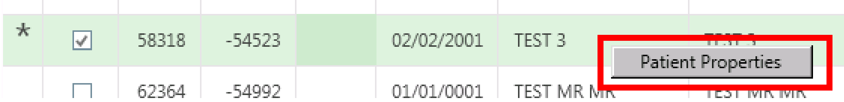
Click the * column to select the target patient for merge.

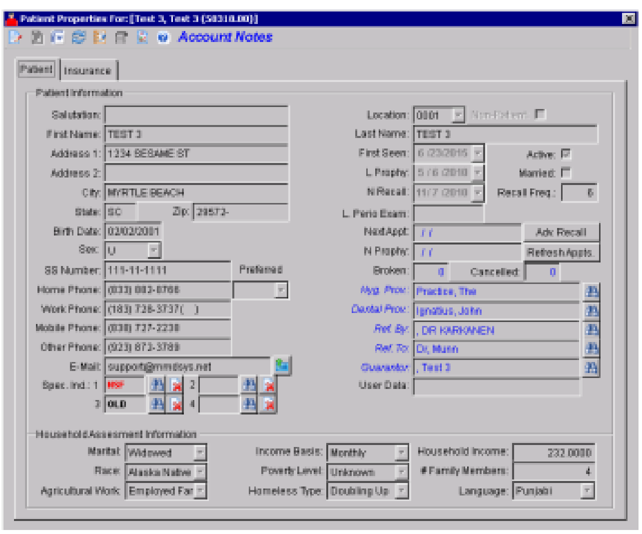
| * | Dup | Pat ID | Guar ID | Ext ID | DOB | Last Name | First Name | SSN | Sex | Address 1 | Address 2 | City |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ☐ | 58314 | -54521 | | 04/05/1977 | TEST 1 | TEST 1 | | U | 123 MAIN STREET | | MYRTLE BEACH |
| | ☐ | 58316 | -54522 | | 01/01/0001 | TEST 2 | TEST 2 | | U | | | MYRTLE BEACH |
| | ☐ | 65114 | -55390 | | 01/01/0001 | TEST 2013 | TEST 2013 | | U | | | MYRTLE BEACH |
| * | ☑ | 65264 | -56312 | | 01/01/0001 | TEST 3 | TEST 3 | | M | | | MYRTLE BEACH |

**Note -** **All merged information will be placed in the target patient record. All duplicate patient records will be deleted once the merge is complete.**

**Caution -** **<u>Please ensure that you have selected the correct target record</u>. The target record with the asterisk designation will be the main record into which all duplicate records will be merged. All information in the target record takes precedence and <u>will override any duplicate information</u> from the other records.**

**If necessary, you may review any patient record in full by right-clicking on the record and clicking the Patient Properties button to open the Patient Properties window in Practice Navigator.**




4. Click the **Merge** button to merge the selected patient records. A confirmation dialog box with the patient numbers that were merged displays the status of patient merges.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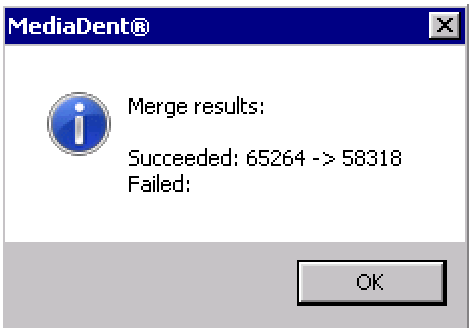


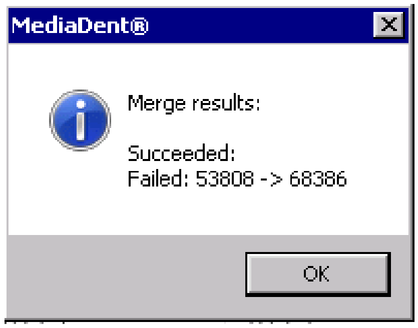


***Successful Merge***

***Failed Merge***

Click **OK** to close the dialog box.

## Understanding Merged Data

The following table outlines the behavior of merged data between duplicate and target.

<table>
<tr><th>Information/Location</th><th>After the merge…</th></tr>
<tr><td colspan="2">Practice Navigator</td></tr>
<tr><td>Patient Properties window – Patient tab</td><td>Demographic information for the target patient will be the default information after a merge.<br>• Special Indicators fields – Since patients may have up to four special indicator codes, any codes from the duplicate patient will populate in the Special Indicators fields on the Patient tab if the same codes are not already present on the target patient.</td></tr>
<tr><td>Patient Properties window – Insurance tab</td><td>All information in the Patient Information, Primary Plan Information, and/or Secondary Plan Information sections on the Insurance tab will default to the target patient.</td></tr>
<tr><td>Patient and Account Notes window – Patient Notes tab</td><td rowspan="5">All information from both the duplicate and target patients will be kept on the target patient’s record.</td></tr>
<tr><td>Patient Documents window</td></tr>
<tr><td>Account Ledger window</td></tr>
<tr><td>Payment Assignments window</td></tr>
<tr><td>Treatment Plan Properties window</td></tr>
<tr><td colspan="2">Scheduling</td></tr>
<tr><td>Patient Appointments window</td><td>Appointment information from both the duplicate and target patients will be kept on the target patient’s record. This includes both past and future appointment information.</td></tr>
</table>


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| | |
|---|---|
| **Medical Alerts** window | • If duplicate alerts exist between the duplicate and target patients, the merge will default to the target patient's alerts.<br>• If different alerts exist between the duplicate and target patients, both sets of alerts will be kept on the target patient's record. |

### Chart module

| | |
|---|---|
| **Charting** tab | Charting information for the target patient will be the default information after a merge.<br>• **Odontogram** – If the duplicate patient includes pathology findings that are not on the target patient's odontogram, the duplicate patient's findings will be included on the target patient's record. |
| **Perio** tab | Perio information for the target patient will be the default information after a merge.<br>• If the duplicate and target patients have different information recorded, both sets of perio data will populate on the target patient's record. |
| **Progress Notes** tab | All information from both the duplicate and target patients will be kept on the target patient's record. |
| **Imaging** tab | |
| **Lab Work** | |
| **Medications** | Medications from both the duplicate and target patients will be kept on the target patient's record. |

### Financial

| **Patient Merge with Same Guarantor** | |
|---|---|
| Patient merges that have the same guarantor will move all information from the duplicate patient to the target patient's record. | |
| **Patient Merge with Different Guarantors** | |
| **Unapplied Balances** | The user should manually apply as much of the unapplied balance as possible before performing the merge. |
| **Payments/Credits** | All payments and credits will remain with the duplicate patient's record. **No payments/credits will be moved to the target patient.** |
| **Outstanding Balances** | • A **debit** will be created on the **target** patient's record for each provider that has an outstanding balance from a duplicate patient. |


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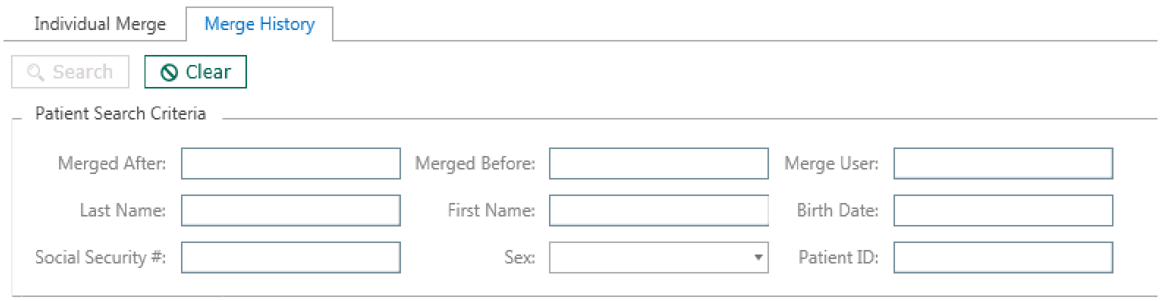
- A **credit** will be created on the **duplicate** patient's record for record for each provider that has an outstanding balance from a duplicate patient.

  **Note -** *Users must manually apply the credits on the duplicate patient account(s) to the appropriate line items via the **Account Ledger**.*

## Viewing Merged Patient History

The **Merge History** tab enables users to view a history of all patient merges.




To view merge history:

1. Enter the appropriate search criteria in the **Patient Search Criteria** field. You may search by date range (patient merges before/after a certain date), merge user, last name, first name, birth date, SSN, sex, patient ID, or a combination of these.

   **Note -** *At least one search criteria must be entered to perform the search.*

2. Click the **Search** button. (To clear the search field, click **Clear**.) A list of all patient records matching the search criteria displays on the **Merged Patients** grid.

   Merged Patients

   | New Patient # | Old Patient # | New External ID | Old External ID | Last Name | First Name | Middle | Sex | Birthdate | SSN | Merge Date | Merge User |
   |---|---|---|---|---|---|---|---|---|---|---|---|
   | 58318 | 65264 | | | TEST 3 | TEST 3 | | M | | | 01/05/2017 | Mr. Administrator |
   | 68466 | 68468 | | | PENNY | DOOMED | | U | | | 01/04/2017 | Papillon Kalaba |
   | 68460 | 68462 | | | QUINTEN | TODD | | U | | | 01/04/2017 | Papillon Kalaba |
   | 68454 | 68458 | | | WEBBB | CARRIE | | U | | | 01/03/2017 | Papillon Kalaba |
   | 68454 | 68456 | | | WEBB | CARRIE | | U | | | 01/03/2017 | Papillon Kalaba |

   The following information is available for viewing:

   - New Patient #
   - Old Patient #
   - New External ID
   - Old External ID
   - Last Name
   - First Name
   - Middle
   - Sex
   - Birthdate
   - SSN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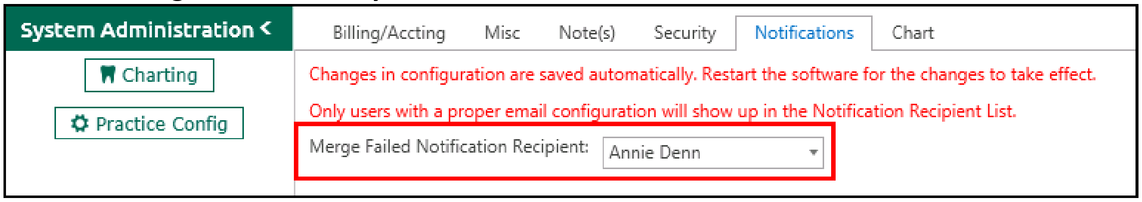
- Merge Date
- Merge User

### Merged Failed Notification Receipt (Intergy integrated clients only)

When users perform a patient merge in Intergy, MediaDent is notified alerting them of the merge and then Mediadent tries to merge the patients automatically. If the merge fails, an email alert may be sent indicating a failed merge. Users can then manually merge the patients using the merge utility.

Intergy-integrated users may be configured to receive email notifications about failed merges by selecting the appropriate user in the **Merge Failed Notification Recipient** drop-down list on the **Notifications** tab under **Practice Configuration** in the **System Administration** module.




**Note -** *Only one user may receive failed notification requests.*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