

5.23 Release Features

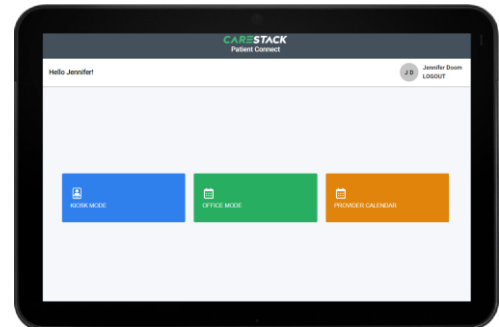
This release formally launches some features you might have seen in Early Access -Care Notes and Patient Connect. There's more to come for orthodontic billing, claim forms, and statements. We'll release things after careful testing through the holiday season.

Key Features

Connect with Patients

Mobile Devices to the Rescue: Streamline your check-in with an updated kiosk feature that also lets you access patient profiles on your mobile device to support them and get paperwork signed.

Update your forms in the new Office Wizard so you can use them in Patient Connect!



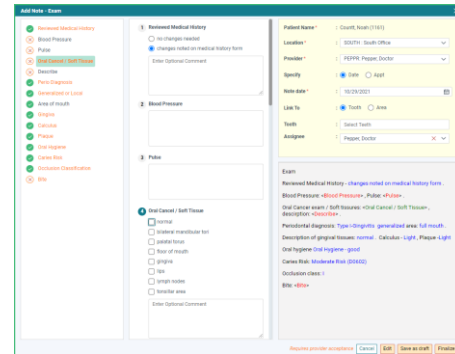
Kiosk Mode: <https://vimeo.com/640549242>

Office Mode: <https://vimeo.com/640549535>

Take Note

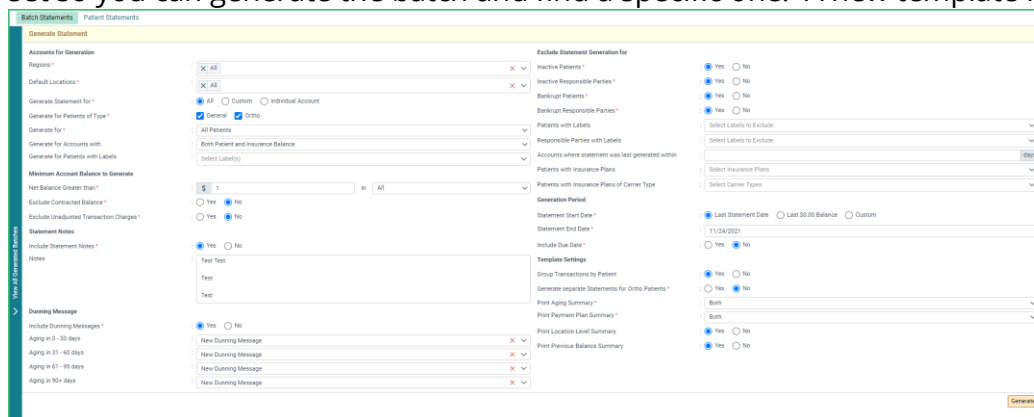
Merge, Answer, Review: Use the redesigned Care Notes slider to quickly identify and answer your prompt questions for one note or multiple notes merged together to create a comprehensive note.

Learn more: <https://vimeo.com/653469550>



Make a Statement

Individually or in Batches: Find and review a patient's statement with a more integrated statement set so you can generate the batch and find a specific one. A new template is coming soon too.



More Improvements

Front Desk

- ≡ Get more information in your **blocked slots** by setting your practice level preference to show the note or the provider details first.
- ≡ Reschedule appointments with the original codes which are maintained in the treatment summary.
- ≡ Build **Patient Lists** to find patients that need recalls by production type.
- ≡ Delete **Patient Flags** that are no longer in use for cleaner tracking.

Revenue Cycle Management:

- ≡ Prepare your **Orthodontic Case** and payment plans with anticipated dates and amounts and save them in draft form. Edit or start them when you are ready. *Available in early January.*
- ≡ Set your preference for structuring your Orthodontic payment plans to follow the case's details or to be independent. *Available in early January.*
- ≡ Create flexile Orthodontic payment plans with options for secondary insurance, \$0 codes, and separate payment and claim cycles. Learn more: <https://vimeo.com/653789478> *Available in early January*
- ≡ Send claims and authorizations with the **ADA 2019 Claim** form *-beginning late December.*

Clinical:

- ≡ Chart measurements more accurately in the **Perio Chart** with dentition reflects the patient's dentition, the ability to mark bleeding in multiple places, and draw freehand notations.
- ≡ Set your preferred path through pocket measurements with new probing directions.
- ≡ Chart treatments from the **Add Code** slider more quickly now that the selected tooth carries over to related codes and conditions.
- ≡ Refer your patients with comprehensive options in the **Referral Portal** to download and deliver images and letters. You can even rescind the referral.
- ≡ When using **Tigerview**, select and view multiple images at once.

Reporting and Analytics

- ≡ Find greater details about appointments and cancellations with expanded options in the **Appointment By Provider** report. Filter for primary or secondary providers, or codes.
- ≡ Track key performance indicators in your **Dashboards** with new metrics for Patient Growth Rate, and the option to filter for adjustment codes in production and collection KPIs.

Patient Services

- ≡ Encourage patients to complete forms with a new specialized **Pending Forms Campaign**. It's already designed, just add any customization, and enable it.

Early Access

Super Slider and Scheduling

- ≡ Schedule with a new comprehensive slider
 - Treatments are tucked within the appointment slider
 - Designate provider time if desired
 - Reschedule with obvious options for treatments
 - Link appointment notes to the patient memo
 - Learn more: <https://vimeo.com/625726953>
- ≡ Access all areas of the patient record through a comprehensive slider.
 - Learn more: <https://vimeo.com/623901165>

IRIS

- ≡ Communicate with your team and with your patients in a single comprehensive tool
 - Switch between office and patient chat
 - Follow the history of conversations
 - Set preferences for notifications
- ≡ Learn more: <https://vimeo.com/606865484>