DENTRIX®

Dentrix G4 Productivity Pack 8

RELEASE GUIDE

PUBLICATION DATE

November 2010

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LICENSES AND TRADEMARKS

Contents

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G4

Dentrix G4 Productivity Pack 8

Overview and New Features

This Dentrix G4 Productivity Pack 8 Release Guide provides information about the new Productivity Pack 8 software release. This overview section includes important notes regarding this release, followed by a brief description of the new features and enhancements available in this release.

Note: For information about using the new features in this Productivity Pack, refer to "Using the New Features and Enhancements" in this document or refer to the Dentrix Help. For information about new features and enhancements in previous Dentrix releases, see the "What's New in Dentrix?" section of the Dentrix Help.

Important Notes

- Beginning with Dentrix G4, Henry Schein Practice Solutions no longer develops solutions for or tests compatibility with Windows 2000. Dentrix G4 will not install on Windows 2000 or prior Windows operating systems.

- Visit www.dentrix.com/products/dentrix to download an updated copy of the Dentrix G4 system requirements.

- Henry Schein Practice Solutions recommends that you install this update at a time that is outside your regular office hours.

New Features

Dentrix G4 Productivity Pack 8 includes the following new features and enhancements:

APPOINTMENT BOOK

- You now have one-button access through the Appointment Book, Chart, and Treatment Planner toolbars to Digital Dental Exchange (DDX). Through DDX you and your staff can order and track lab work with less disruption to patient visits.

- The Attach Case button in the Appointment Information dialog box was renamed Patient Lab Cases. The Patient Lab Cases dialog box now includes the New DDX Rx and DDX Case List buttons.

- From the Pinboard, you can now restore all scheduled appointments or events to the Appointment Book by right-clicking an appointment or event and selecting Restore All Pinboard Appointments/ Events from the menu.

- From the Schedule Event and Edit Event dialog boxes, you can now click the Pinboard button to place the event on the Pinboard.

- From the Edit Event dialog box or the Appointment Book toolbar, you can delete an event by clicking a new Delete button.

- The new Patient Visit Form is a customizable route slip that you can view or print for a selected appointment, a certain patient, or multiple patients by clicking the Patient Visit Form button on the Appointment Book toolbar. (You can also generate this form for one or more patients from the Office Manager.)

LEDGER

- From the File menu in the Ledger, you can select Insurance Payment Setup to set up default insurance write-off and refund adjustment types, enable automatic adjustments for insurance payments, and post refund adjustments automatically. Additionally, you can set up secondary insurance claims to be created automatically whenever primary claim payments are made.

- The Check # fields in all areas of Dentrix in which a payment can be entered or displayed now allow up to 20 characters. Previously, these fields only accepted up to nine characters.

OFFICE MANAGER

- Three new prescription forms have been added to the Printer Form Setup List to support printing on tamper-proof paper.

PRESCRIPTIONS

- You can now correct prescription dates, if necessary, or enter a date for a new prescription that cannot be filled immediately. This can be very convenient for patients who cannot return for an office visit or when a doctor is not available to patients.

- You can find, review, and refill prescriptions by clicking the new Refill button.

QUESTIONNAIRES

- You can now require answers to questionnaire questions, ensuring that patients provide information critical to your practice, such as secondary insurance policies.

- The Submit button is now disabled until all required questions are answered and until the last page of a questionnaire.

- You can now set an expiration period for responses to questionnaires and prompt your staff when patients must re-confirm their information. Letting Dentrix track patient information frees your staff to spend more time on more critical duties.

- When you select a referral, employer, or insurance plan from the Update Patient Information dialog box in the Questionnaires module, the corresponding text that was entered in the Questionnaire form automatically populates the name fields of the Select Patient, Select Employer, and Select Dental Insurance windows respectively.

- With the Questionnaire Response to Note Field option, you can import patient comments from a questionnaire to create a patient, guarantor account, or clinical note. You can also use a patient comment to create a patient or family alert.

- When you add, change, or delete medical alerts in Definitions, you can automatically update any Questionnaire forms that use medical alerts.

MISCELLANEOUS

- Installing the Dentrix G4 Productivity Pack 8 automatically installs a plug-in for Microsoft Word 2007 and 2010. With this plug-in, you can easily view and insert data merge field codes to create custom Microsoft Word mail-merge templates.

- The new Dentrix Launcher lets you open the Dentrix modules from a graphical virtual front office and operatory. This virtual practice lets new users learn the domain of each module intuitively. With this understanding, they can quickly learn to navigate the system and complete routine tasks.

PRACTICE ADVISOR

- The new Daily Huddle Report includes a collection of reports that gives practices a view of the daily schedule and key performance metrics. Office managers can measure performance against monthly goals for production, scheduling, collections, and attracting new patients. The Scheduled Patients list includes a number of flags that you can use to guide staff assignments and prepare for patient visits, including lab work, treatment plans, appointment information, insurance eligibility, and more.

Installing Dentrix G4 Productivity Pack 8

The Dentrix G4 Productivity Pack 8 must be installed on each workstation that runs Dentrix. You can easily install the productivity pack using the Check for Updates feature.

Complete the following steps to check for updates and install Dentrix G4 Productivity Pack 8. If the update notification appears automatically, skip to Step 3.

1. Before installing Productivity Pack 8, you must have installed Productivity Pack 7. Instructions for installing Productivity Pack 7 are available in the Dentrix G4 Productivity Pack 7 update guide at the Dentrix Resource Center (www.dentrix.com/resource-center/).

2. Right-click the Dentrix Quick Launch icon in the notification area of the Windows task bar to open the Quick Launch menu. Next, click Updates and then click Check for Updates.

    The Check for Updates progress message appears, followed by the Downloadable Updates dialog box.

    If the Dentrix Quick Launch icon is not displayed in the notification area, you can check for updates by clicking About Dentrix from the Help menu of any module and then clicking the Check for Updates link.
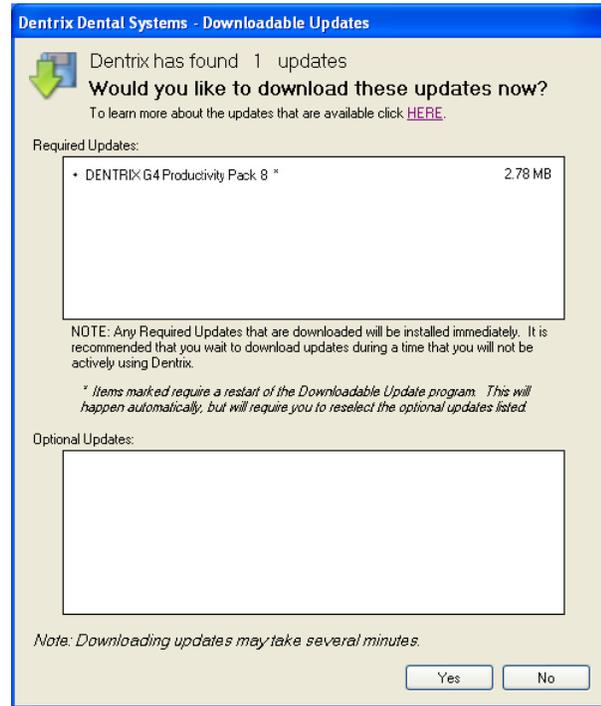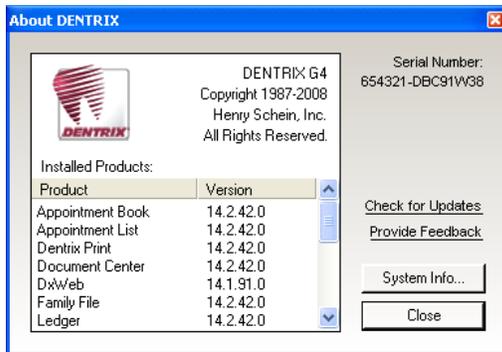
    Note: If there is a problem with your Internet connection, an error message may appear. Check your Internet connection and try to check for updates again.

3. Click Yes to download the Required Updates.

    The Download Progress message appears while the updates are downloaded and installed.

    If you do not have sufficient time to install the update, click the Install Later button and install the Productivity Pack when you have several minutes to an hour or more to dedicate to installing the Productivity Pack on the server and on each computer in the office.

4. Follow the on-screen instructions to install the Productivity Pack.

    For help with the download and installation of Dentrix G4 Productivity Pack 8, contact Dentrix Support at (800) 336-8749.

Installing the Productivity Pack on Other Computers

This Productivity Pack must be installed on each workstation that runs Dentrix G4. Once the productivity pack is installed on one computer on your network, you can easily install it on any other computer on your network when you launch any Dentrix module.

When you attempt to open a module on a computer that does not have the required updates, a message appears notifing you that updates need to be installed.

Important: You must install the required updates in order to use Dentrix on that computer because every computer on your network must run the same version of Dentrix.

To install the updates, click Install Now from the message that appears. All open Dentrix programs should close and an install status message box appears. The updates will install and you can then access Dentrix on that computer.

Using the New Features and Enhancements

The following information will help you understand how to use the new features and enhancements in this Productivity Pack.

Appointment Book

ADDING DDX LAB CASE PRESCRIPTIONS AND VIEWING THE DDX LAB CASE LIST

Ordering lab work is much simpler with the addition of a Digital Dental Exchange (DDX) button to the Appointment Book, Chart, and Treatment Planner toolbars. From the DDX menu, you can log in to the DDX website to add a prescription or view the lab case list. You can also add prescriptions or view the lab case list from the Appointment Information dialog box.

To add a DDX Lab Case Prescription or to view the DDX Lab Case List

1.   From the Appointment Book toolbar, click the DDX button.

2.   From the menu, select New DDX Lab Case Prescription or View DDX Lab Case List.

3.   Log in to the DDX website.

To add a prescription or to view the lab case list from the Appointment Information dialog box

1.   From the Appointment Book, double-click an appointment.

2.   From the Appointment Information dialog box, click Patient Lab Cases.

3.   From the Patient Lab Cases dialog box, click New DDX Rx or DDX Case List.

4.   Log in to the DDX website.

RESTORING ALL APPOINTMENTS FROM THE PINBOARD

At times you may have to reschedule a large number of appointments without losing track of any. Improvements to the Pinboard let you move all appointments for a day, an operatory, or a provider to the Pinboard for rescheduling. If you have a mixed group of scheduled and unscheduled appointments on the Pinboard, you can restore all scheduled appointments and move the unscheduled ones to the Unscheduled Appointment list or leave them on the Pinboard.

To restore all appointments from the Pinboard

1.   Right-click an appointment on the Pinboard, and from the menu, select Restore All Pinboard Appointments.

     Note: If one or more of the Pinboard appointments cannot be restored, you can keep the appointments on the Pinboard or move them to the Unscheduled list.

2.   Select the appropriate option and click OK.

PLACING EVENTS ON AND DELETING EVENTS FROM THE PINBOARD

You can click the Pinboard or Delete buttons on the Edit Event dialog box to place an event on or delete an event from the Pinboard.

To place an event on the Pinboard

1.   From the Appointment Book, right-click the event that you want to place on the Pinboard and select Edit Event from the shortcut menu.

2.   From the Edit Event dialog box, click Pinboard.

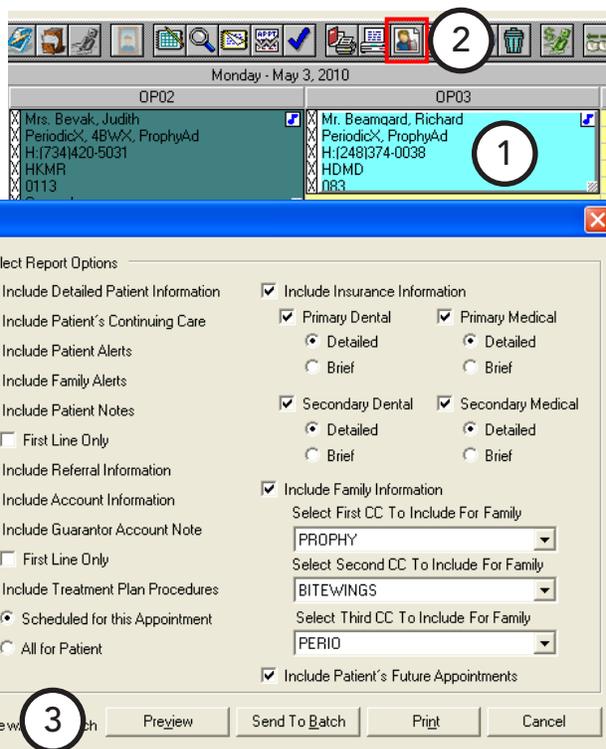To delete an event from the Pinboard

1. From the Pinboard, right-click the event that you want to delete and select Edit Event from the shortcut menu.

2. From the Edit Event dialog box, click Delete.

GENERATING PATIENT VISIT FORMS

The Patient Visit Form is a customizable route slip that you can view or print for a selected appointment, a certain patient, or multiple patients. You can filter the forms that are generated by primary provider, appointment provider, operatory, and appointment date. The form can include patient, family, account, continuing care, and insurance information; patient and family alerts; patient and account notes; treatment-planned procedures; and future appointments.

To generate a Patient Visit Form

1. From the Appointment Book, select the appointment you want to generate a visit form for.

2. From the toolbar, click Patient Visit Form.

3. Set up the report options, indicating the information you want to include, and then click Preview.

PATIENT VISIT FORM

Mon 05/03/2010 at 9:00am OP02 HKMR 60 min					For Ludoni, Johnna		Page:			1

Patient Ludoni, Johnna — Chart# LU0009 SS# ###-##-4455 Birth: 11/11/1957 Age: 53 Married
Medical Alerts:

Appointment Mon 05/03/2010 at 9:00am — OP02 HKMR 60 min Status: <none> Reason:proa...vmt — Amount: 113.00
Note: proa...vmt

Patient Detail	Home (734)555-9347	Mobile	Work (734)555-0078	Other	Fax
123456 Joy Rd		Last Referred To: Endodontics PC, 08/24/2010		Prov1: DCJR	Prov2: HMAA
Livonia, MI 48150		Employer: Ludoni Bakery		Consent Date:	10/16/07
		Prophy Due: 05/03/10	Prior Tx: 11/02/09	First Visit Date:	10/16/07
E-mail:		Missed Appt #: 1	Last Missed: 08/12/08	Last Visit Date:	11/02/09

Patient Alerts AP

Patient Notes Johnna brings cookies on the first Monday of every month from her bakery.

Guarantor Account Note Payment required before starting treatment

Primary Dental Insurance Delta Dental New Jersey — Subscriber: Ludoni, David
Group #: 58550101 Phone: (800)555-9310 Subscriber ID: 000000000 Birth: 11/11/1964
Benefits P Max: 1,000 Used 79.00 Pend 142.00 Rem 0.00 Ren: Jan Ded Owed S/P/O: Pat 0/0/0 Fam -100/0/0
Benefits F Max: 0 Used 524.00 Pend 142.00 Rem 0.00

Code	Category	%	D	Code	Category	%	D	Code	Category	%	D	Code	Category	%	D	Code	Category	%	D
D0100	Diag/Preventive	100	P	D2000	Basic Restor	50	S	D2700	Crowns	50	S	D2900	Other Restor.	50	S	D3000	Endodontics	50	S
D4000	Periodontics	50	S	D5000	Prostho, remov	50	S	D5900	Maxillo. Prosth	50	S	D6000	Implants	0	S	D6200	Prostho, fixed	50	S
D7000	Oral Surgery	0	S	D8000	Orthodontics	50	O	D9000	Adj gen serv	50	S								

Note: - Tue - Nov 3, 2009 -Ortho Max $2000

Treatment Plan (all for patient) — (estimates do not include dental plan maximums and deductibles)

Date	Visit	Th	Surf	Code	Procedure	Fee	Pat Est	Pri Ins	Sec Ins
8/24/10	0	8	MID	D2160	Amalgam-3 surf. prim/perm	94.00	94.00	0.00	0.00
					TOTALS:	94.00	94.00	0.00	0.00

Patient Appointments	Date	Time	Prov	Reason
	08/26/2010	10:00am	DCJR	GnFIInRtP

Ledger

SETTING UP INSURANCE WRITE-OFF AND REFUND ADJUSTMENT TYPES

A new Insurance Payment Setup option allows you to set up default insurance write-off and refund adjustment types, enable automatic adjustments for insurance payments, and post refund adjustments automatically in place of entering negative insurance payment amounts. Additionally, you can set up secondary insurance claims to be created automatically whenever primary claim payments are made.

To set up a default insurance write-off adjustment type

1. In the Ledger, from the File menu, click Insurance Payment Setup.

2. In the Insurance Payment Setup dialog box, under Insurance Adjustment Setup, click the Default Insurance Write-Off Adjustment Type (-) search button.

3. From the Select Adjustment Type dialog box, select the write-off adjustment type that you want to use, and click OK.

To set up a default insurance refund adjustment type

1. In Ledger, from the File menu, click Insurance Payment Setup.

2. Under Insurance Adjustment Setup, click the Default Insurance Refund Adjustment Type (+) search button.

3. From the Select Adjustment Type dialog box, select the refund adjustment type that you want to use, and click OK.

SETTING UP AUTOMATIC ADJUSTMENTS FOR INSURANCE PAYMENTS

This option automatically calculates adjustments and splits them among providers, if necessary, according to the payment that is entered for an insurance claim.

To enable automatic adjustments for insurance payments

• In the Insurance Payment Setup dialog box, under Insurance Adjustment Setup, click Enable Automatic Adjustments for Insurance Payments.

POSTING REFUND ADJUSTMENTS AUTOMATICALLY TO REPLACE NEGATIVE PAYMENTS

Selecting this option allows you to post refund adjustments automatically in place of entering negative insurance payment amounts.

To post refund adjustments automatically to replace negative payments

• In the Insurance Payment Setup dialog box, under Insurance Adjustment Setup, click Enable Automatic Adjustments for Insurance Payments and then click Auto-post Refund adjustments to replace negative payments.

CREATING SECONDARY CLAIMS AUTOMATICALLY

This option creates a secondary dental claim automatically whenever a primary dental insurance claim payment is posted and if the following is true:

• A patient has secondary insurance set up in Family File.

• A secondary dental claim has not been created already.

To create a secondary dental claim automatically when you submit a primary payment

1. In the Insurance Payment Setup dialog box, under Additional Options, click Auto-Create Secondary Claim with Primary Payment.

2. To mark the secondary dental claim as "received" if no pending insurance estimate exists, click Auto-Receive Secondary Claim if No Pending Ins Estimate.

ADJUSTING INSURANCE PAYMENTS AUTOMATICALLY

Dentrix will automatically adjust insurance payments if you select Enable Automatic Adjustments for Insurance Payments in the Insurance Payment Setup dialog box.

To make adjustments to insurance payments automatically

1. From the Insurance Claim dialog box, in the Enter Payment shortcut menu, click Itemize by Procedure or Total Payment Only.

   The Total Insurance Payment dialog box appears.

   - If the total amount paid for the claim is less than the total billed, Dentrix calculates a Write-Off (-) adjustment and displays it under Enter Adjustment in the Total Amount text box.

   - If the total amount paid for the claim is more than the total amount billed, Dentrix calculates a Refund (+) adjustment and displays it under Enter Adjustment in the Total Amount text box.

   - If the total amount of the adjustment applies to more than one provider, Dentrix selects Split Adjustment by Provider, calculates the adjustment amounts for each provider, and displays the adjustment amounts and providers under Provider Amounts when the insurance payment is posted.

   - If a payment amount for the claim is negative and you selected Auto-post Refund Adjustments to replace negative payments, Dentrix calculates a Refund (+) adjustment and displays it according to the negative payment amount that you entered.

2. To view or modify the adjustments for each provider, click Split Adjustment by Provider and then click Prov Amts.

3. In the Provider Amounts for Write-Off (-) dialog box, select a provider from the list and click Edit.

4. In the Provider Adjustment Amount for Write-Off (-) dialog box, enter the amount of the adjustment, and then click OK.

VIEWING AUTOMATIC INSURANCE PAYMENT ADJUSTMENTS

The Show Transaction Links option under View in Ledger now includes any posted adjustments that are associated with an insurance claim. For example, if you post a payment to and adjust an insurance claim, when you click Show Transaction Links for that claim, the claim—and the procedures, payments, and adjustments associated with it—are selected in Ledger.

Claim adjustments are also reflected in the Insurance Claim dialog box.

Note: Insurance claim adjustments that have been moved to history cannot be modified or deleted. If you double-click an adjustment in the Insurance Claim dialog box, and it has not been sent to history, the Change or Delete Adjustment dialog box appears.

Prescriptions

BACKDATING AND REFILLING PRESCRIPTIONS

You can now correct prescription dates, if necessary, or enter a date for a new prescription that cannot be filled immediately. This can be very convenient for patients who cannot return for an office visit or when a doctor is not available to patients. Also, you can click the new Refill button to re-fill a prescription.

To backdate a prescription

1. After selecting a patient and from any Dentrix module's toolbar (except Office Manager), click Prescriptions.

2. From the Patient Prescriptions dialog box, click New.

3. From the New Patient Prescription dialog box, change the date in the Date text box to one prior to the current date.

To refill a prescription

1. After selecting a patient and from any Dentrix module's toolbar (except Office Manager), click Prescriptions.

2. From the Patient Prescriptions dialog box, select the prescription from the list that you want to refill and click Refill.

3. From the View Patient Prescription dialog box, enter the number of times you will allow the patient to refill the prescription.
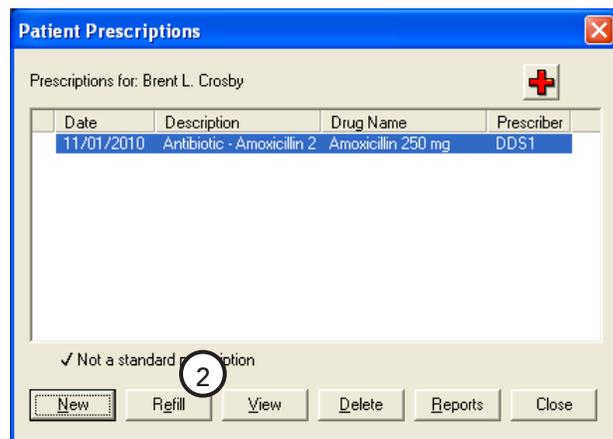
PRINTING ON TAMPER-PROOF PAPER

Three new prescription forms have been added to the Printer Setup Form list to support printing on tamper-proof paper.

To select a tamper-proof form

1. From the Office Manager, click Maintenance > Practice Setup > Prescriptions Setup.

2. Click Print Setup.

3. Under Form, select one of the following tamper-proof forms.

    •   WA State Full-sheet

    •   WA State Half-sheet

    •   WA State Standard

Questionnaires

REQUIRING RESPONSES TO QUESTIONNAIRES

You can now require answers to questionnaire questions, ensuring patients provide information critical to your practice, such as secondary insurance policies.

To require a response to a question

1. From the Edit menu of the Questionnaires module, click Questionnaire Setup.

2. From the Questionnaire Setup dialog box, click New Form and then select Copy Selected Form to create a new form based on an existing one.

3. From the Questionnaire Form Setup dialog box, select the questions you want to require an answer for under the Req column.

Note: If you require an answer to a question and patients click the Submit button before providing all required responses, a message appears informing them that they must respond to all required questions.

UPDATING PATIENT INFORMATION

When you select a referral, employer, or insurance plan from the Update Patient Information dialog box in the Questionnaires module, the corresponding text that was entered in the Questionnaire form automatically populates the name fields of the Select Patient, Select Employer, and Select Dental Insurance windows respectively.

INSERTING NOTES INTO PATIENT-RELATED NOTE FIELDS

A new option in the Question Setup dialog box lets you insert notes from a Questionnaire form into any patient-related note field to update patient information or to create new patient alerts.

To insert a note from a Questionnaire form into a note field

1. From Questionnaires, click Edit > Questionnaire Setup.

2. Select a Questionnaire Form and click New Form or Edit Form.

3. From the Questionnaire Form Setup dialog box, click New Question or Edit Question.

4. From the Question Setup dialog box, select Note Response from the Response Type list and then click Use Note to Update Patient Information.

SETTING EXPIRATION DATES

You can now set expiration dates on questionnaires to help you and your staff keep your patient records updated. Keeping these records updated helps ensure that billing and mailing information is correct and that patients don't fall through the cracks.

To set an expiration date

1. From the Edit menu of the Questionnaires module, click Questionnaire Setup.

2. Select a questionnaire form from the list and click the Set Expiration button.

3. From the Set Expiration For Responses dialog box, select the number of months that you want to pass before requiring patients to update their responses to the selected form and click OK.

ADDING, CHANGING, OR DELETING MEDICAL ALERTS

Whenever you add, change, or delete a medical alert in the Practice Definitions dialog box, the Questionnaire forms that use medical alerts are updated atuomatically to include these changes.

To add, change, or delete a medical alert

1. From the Practice Definitions dialog box, select Medical Alerts from the Definition Type list.

   a. If you are changing or deleting a medical alert, select a definition text from the list.

2. As appropriate, click Add, Change, or Delete.

   A message appears stating that any changes to Medical Alerts will update any Questionnaire form that uses Medical Alerts.

3. Click OK to continue.

   Dentrix updates the Questionnaire forms appropriately.
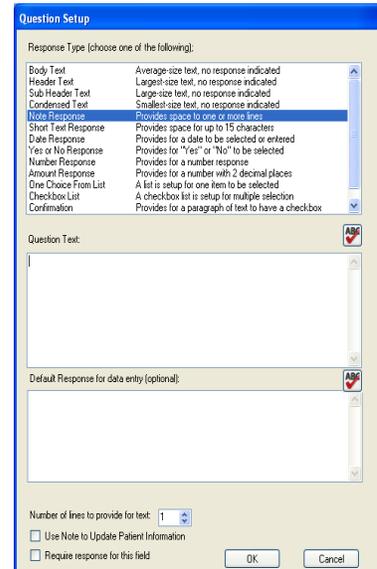
Practice Advisor

DAILY HUDDLE REPORT

You can use the production, collections, case acceptance, new patients, and scheduling details of the Daily Huddle Report during your office's morning staff meetings to provide some daily statistics to help you focus on the patients coming in for treatment on the current day and/or the following day.

To run the Daily Huddle Report

1. In the Office Manager, from the Analysis menu, click Practice Advisor to open the Practice Advisor dialog box.

2. Click Daily Huddle Report.

3. In the Daily Huddle Report dialog box, select a set of previously saved report options, or change the default report options.

4. Click Preview to preview the report.

Daily Huddle Report
Daily Huddle Summary

Today is: 11/12/2009   **Page: 2 of 54**

Appointment Day Note:
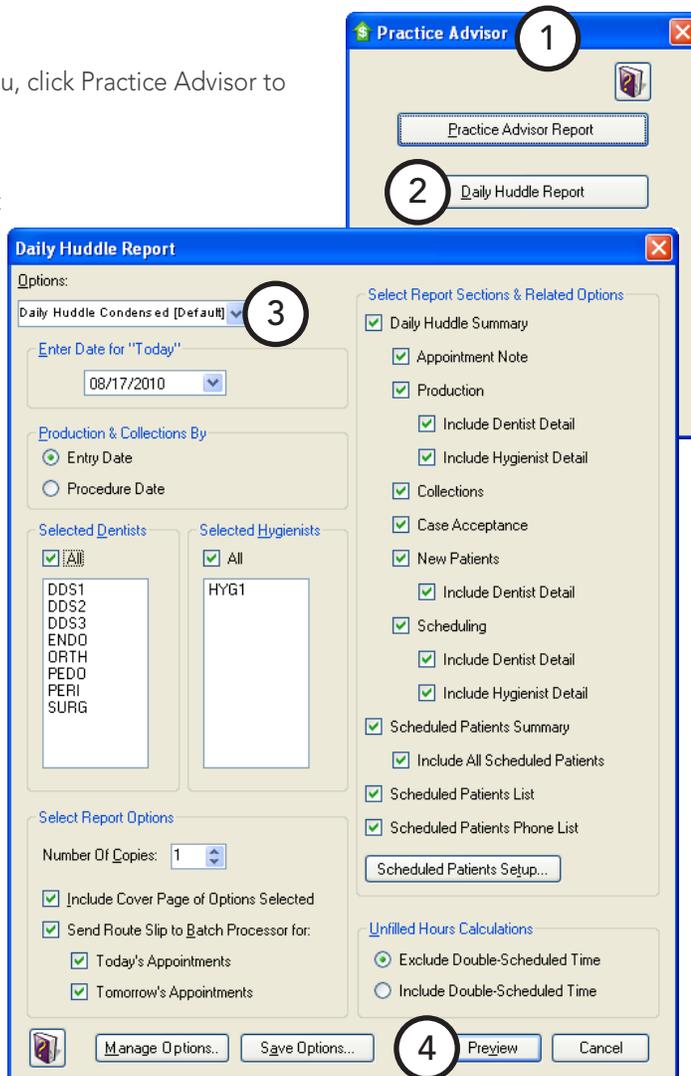This is a note to remind everyone to work on filling the schedule for next week. And it isTina's birthday and Joy will be out of the office the whole week.

PRODUCTION	Completed Prior Day	Scheduled Today	Completed MTD	Scheduled Rem Month	Total	MTD Goal
Dentist Completed/Scheduled	13,284.00	8,636.00	135,197.00	96,798.00	231,995.00	326,000.00
Hygienist Completed/Scheduled	5,104.00	3,475.00	31,530.00	39,891.00	71,421.00	100,080.00
Total Production Completed/Scheduled	18,388.00	12,111.00	166,727.00	136,689.00	303,416.00	426,080.00

COLLECTIONS	Prior Day	%	MTD	%		
Collections (% Production)	16,394.96	89%	131,205.29	79%		

CASE ACCEPTANCE	Prior Day		MTD			
Amount of Treatment Diagnosed	30,038.00		299,936.00			
Amount of Treatment Accepted	9,210.00		74,192.00			

Miscellaneous Features

INSERTING MERGE FIELD CODES

An add-in for Microsoft Word 2007 and 2010 lets you easily insert letter merge field codes from Dentrix. Installation of the add-in is simple. Dentrix detects whether Microsoft 2007 or 2010 is installed, and if it is, automatically installs the add-in. You can also install or re-install the add-in using the Dentrix Select Install feature.

The Dentrix Installer adds a Dentrix button to the Mailings tab in the Microsoft Word ribbon. You can show or hide the button in a new task pane. The Dentrix Letter Merge Fields task pane consists of a toolbar with a list of available merge fields.

To insert a merge field code

1. Place your cursor in the document where you want to insert the merge field code.
2. Select a merge field code from the list and from the toolbar, click the Insert Field button.

    The merge field code is inserted into the document.
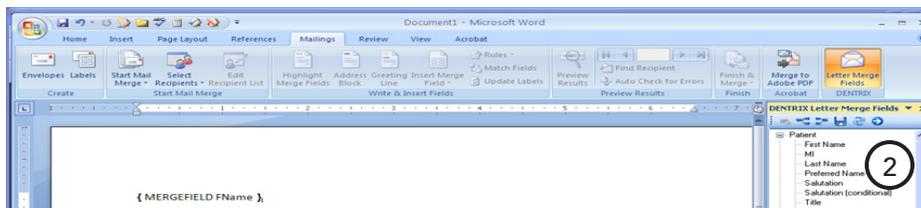
USING THE DENTRIX LAUNCHER

The new Dentrix Launcher provides you with an easy-to-use graphical interface to get new and temporary staff up-to-speed quickly. The Dentrix Launcher starts automatically for new users whenever they log in. For existing users, the automatic start option is turned off. The Dentrix Launcher also allows you to create and save custom views.

To open a module from the Dentrix Launcher

*   From the Dentrix Launcher, click the object or icon that corresponds to the module you want to open.

    For example, to open the Appointment Book, click the image of the monitor beneath the white board.

Productivity Pack 8 Software Changes and Fixes

Dentrix G4 Productivity Pack 8 contains the following software changes and fixes:

Appointment Book

- Running an Appointment Book View Report starting at 12:00 p.m. (noon) caused an invalid time error icon to appear. This has been fixed.

- The printed Appointment Book View Report displayed the providers in a different order than they appeared in the Appointment Book's provider list. The printed report now shows them in the same order as the Appointment Book.

- Moving an appointment to the Pinboard from the Appointment Information dialog box (using the Pinboard button) caused the appointment status to be cleared when the appointment was rescheduled. This has been fixed.

- Clearing the View Appt Note option in Appointment Book's Select View dialog box (click View > Edit) caused the Hover Window to no longer display the note. The Hover Window information is no longer filtered based on the current View restrictions; the information that appears is based only on the settings in the Hover Detail Setup dialog box.

- If a patient was initially scheduled in the Appointment Book at a time when the provider was unavailable, and the patient was then moved to a new appointment time, the error message "Provider unavailable at requested time! Schedule appointment?" appeared repeatedly. This has been fixed.

- For some customers, switching between days in the Appointment Book caused a brief delay. This has been addressed, and the response time is significantly faster.

- The Appointment Book toolbar now incudes a DDX button. Clicking the button opens a menu from which you can select New DDX Lab Case Prescription and View DDX Lab Case List. (The DDX button was also added to the Chart and Treatment Planner toolbars.)

- The Attach Case button in the Appointment Information dialog box was replaced by the Patient Lab Cases button. The Patient Lab Cases dialog box now includes the New DDX Rx and DDX Case List buttons.

- Opening the ASAP List and selecting an appointment while the Unscheduled List was open caused an error message to appear. This has been fixed.

- When using the Appointment Book's Day View and configuring the view (using View > New) to exclude the amount, alerts, and notes, the Hover window did not display all information it should have. For example, the Work Phone, Mobile Phone, Primary Insurance information, Account Balance, and Appt Note did not appear. This information now appears in the Hover window.

- Closing an individual operatory for a day caused the entire Appointment Book day to appear closed for scheduling. This has been fixed.

- If you moved an appointment from the Appointment Book's Unscheduled List to the Pinboard, and then attempted to reschedule the appointment by dragging it to an area of the Appointment Book (particularly where the Unscheduled List window was previously opened on your screen), the appointment could not be rescheduled. This has been fixed.

Family File

- Clicking Print Label from the Patient Referrals dialog box opened the Quick Labels dialog box with the incorrect patient selected. This has been fixed. The label now prints automatically without the dialog box appearing (as was done prior to Productivity Pack 7).

- Kiosk forms allowed you to enter more than one character for a patient's middle initial and then import the data into the Dentrix database, causing data errors. Now, only one character is allowed in the Middle Initial text box during an import in Family File.

- The warning message that appears when you change the insurance information in Family File and select the Change Plan for All option has been rewritten to emphasize that even records in history will be affected. The new message now includes, "Clicking Yes will change all claims attached to this insurance plan, including those in History, in addition to changing the insurance information for all subscribers." Also, the error message that appears after clicking OK was difficult to read because of several line breaks that were inserted in the message. These line breaks have been removed.

Office Manager

- Printing an Appointment History List in Office Manager used to show the date and time of the Scheduled appointment in the History Date/User column. It now shows the date and time the appointment was last modified.
- In the Provider A/R Totals Report, the Adjustments column always reported a 0 when the report was run for a previous year. This has been fixed, and the report now shows the correct adjustment amount.
- In the "Aged Accounts Receivable" section of the Practice Advisor Report, the "A/R with Pending Insurance Claims" balance showed a balance even when there were no outstanding claims. This has been fixed.
- Three new prescription forms have been added to the Printer Setup Form list to support printing on tamper-proof paper. To access the new tamper-proof forms, in Office Manager click Maintenance > Practice Setup > Prescriptions Setup. Click Print Setup. Under Form, you can select from the three new tamper-proof forms: WA State Full-sheet, WA State Half–sheet, and WA State Standard.
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Patient Chart

- Attempting to back date a clinical note to a date in History made it inactive but did not update the note's date. This has been corrected, and the note's date is now updated.
- Saving custom settings in the Print Patient Chart dialog box did not always permanently save the settings. For example, if you canceled the dialog box then closed and re-opened Patient Chart, the settings in the Print Patient Chart dialog box were not saved. This has been fixed.

Prescriptions

- Prescriptions can now be backdated, and a Date text box was added for new prescriptions.
- Prescriptions can be re-activated for refills. The Refill button opens the View Patient Prescription dialog box.

Questionnaires

- When a new patient questionnaire form was created from the website and then moved to an existing patient, the system did not change the "NP" (new patient). As a result, when the questionnaire form required further updates (such as adding an electronic signature), the form was still flagged as a "new patient" form. This has been fixed.
- When setting up a questionnaire, users now have the option to require a question to be answered before the questionnaire can be submitted.
- The Submit button now only has focus on the last page of a questionnaire.
- When a medical alert exceeded 20 characters, the Update Patient Information dialog box did not display every medical alert. This has been fixed.

- Users can now insert a note into any patient related Note fields or to create a new patient alert.
- When users add, change, or delete medical alerts in Definitions, users are asked to automatically update any Questionnaire forms that use medical alerts.

Treatment Planner

- After making changes to a consent form attached to a treatment plan, the updated version of the consent form could not be viewed until after Treatment Planner was manually refreshed or closed and then restarted. This has been fixed, and changes to the consent form can now be viewed when the consent form is subsequently opened for editing.

Practice Advisor

- In the "Aged Accounts Receivable" section of the Practice Advisor Report, the "A/R with Pending Insurance Claims" balance showed a balance even when there were no outstanding claims. This has been fixed.
- If a provider was double-scheduled in the Appointment Book, the Unfilled Hours statistic in the Practice Advisor Report always included the double-scheduled provider time. For example, if a provider is available for eight hours of appointments in one day and has eight hours of appointments scheduled, but two of those hours are double-scheduled, the provider would still have two hours available for additional appointments. However, the Practice Advisor Report was reporting Unfilled Hours as 0 since eight hours were available and eight hours were scheduled. To address this issue, the Practice Advisor Report dialog box now includes new options under Unfilled Hours Calculations. These options let you specify whether you want to Exclude Double-Scheduled Time or Include Double-Scheduled Time in the Unfilled Hours statistic.

How to Learn More about this Release

For complete information on how to use the new features in this Productivity Pack, refer to the Dentrix G4 Help. For information about new features and enhancements in previous Dentrix releases, see the "What's New in Dentrix?" section of the Dentrix G4 Help.

You can view on-demand tutorials, sign up for live webinars, and view webinars in the Resource Center at dentrix.com if you have an active customer service plan. From the Resource Center, you can also access PDF copies of the Reports Reference, User's Guide, System Requirements, and FAQs.