DENTRIX

Dentrix G6

Release Guide
(For Dentrix Canada)

PUBLICATION DATE

March 2015

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LICENSES AND TRADEMARKS

Contents

Overview and New Features

This Dentrix G6 Canada Release Guide provides information about the new 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 release, refer to "Using the New Features and Enhancements" in this document or "What's New in Dentrix?" in the Dentrix Help.

Important Notes

- With the release of Dentrix G6 Canada, the Dentrix database location has been moved to <Drive Letter>:\Dentrix\Common. If you are upgrading from a previous version, your current backup configuration will no longer be valid and you will need to re-configure your backup software to back up the new location of the Dentrix database files. If you are using eBackUp, please contact eServices Customer Support at 1-800-734-5561 for assistance. If you use a third-party backup product, please contact a qualified integration specialist.

- Beginning with Dentrix G6 Canada, Henry Schein Practice Solutions no longer develops solutions for or tests compatibility with Windows 2000. Dentrix G6 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 G6 Canada system requirements.

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

- The Dentrix G6 database allows backups using the eBackUp product to occur while Dentrix modules are open. If you are using any backup product other that eBackUp, you must close all Dentrix modules before backing up your Dentrix database. Failure to do so could result in data errors.

- Beginning with Dentrix G6 Canada, Guru Limited Edition is no longer installed with Dentrix; however, Dentrix integration with existing installations of Guru Limited Edition is still supported. For information on using Guru Limited Edition, refer to the Dentrix Help.

New Features

Dentrix G6 Canada includes the following new features and enhancements:

ALERTS

- Medical alerts were enhanced so you can save medical alert notes in the notes history. You can copy medical alert notes to clicnical notes, include medical alert notes in the Patient Notes Report, and add patient notes from Questionnaire forms to the medical alert note.

- In the **Create Patient Alert** dialog box, a new "Questionnaires" option was added to the list of options where a patient alert could be displayed in Dentrix.

APPOINTMENT BOOK

- Clicking an appointment outlines the appointment block in black so that it's easier to see. Also, clicking an appointment block highlights the appointment time in yellow in the time bars. If you hover the mouse pointer over a time block, the time appears in the block. Tooltips were added to the provider columns, so you can tell at a glance which color is assigned to which provider. You also have the option of hiding the provider color columns from the Appointment Book view.

- The **Enter New Patient Information** dialog box was modified to include text boxes for a mobile phone number and an e-mail address. These changes appear in the More Information dialog box, the Hover window, and Route Slips and Patient View Forms.

- The order of the checks and message prompts that appear when you are scheduling appointments has been changed to be more logical.
- The following options were added to the **Select View** and the **Print Appointment Book View** dialog boxes: Mobile Phone, Other Phone, Email, Age, Birthdate, Primary Insurance, Guarantor Name, Appt Status, and CC Attached.
- When you schedule appointments, conflict warning messages no longer appear excessively.
- Now, when you purge appointments, you can also purge appointment history and events.
- When you create an appointment, you can now type a specific appointment length.
- You can now specify an additional Provider ID for an appointment. You can also display this additional Provider ID field in the appointment block, Hover window, the Print Appointment Book View Report, the Patient Route Slip, and the Patient Visit Form.
- The **Set Appointment Procedures Complete** dialog box in the Appointment Book now allows you to view and easily assign providers to procedures before posting them.
- Appointment blocks, the Hover window, the **Appointment Information** dialog box, and the **Appointment History** dialog box now include a **Date/Time Created** field and **Staff ID** field so you can see when the appointment was created and who created it.

DOCUMENT CENTER

- A new screen capture feature allows you to select an area of the screen and save the image in the Document Center. To learn more, see "Acquiring screen captures" in the Dentrix Help.
- Acquiring documents for the Document Center is even easier now. You can acquire documents using any type of device that supports the following outputs: .pdf, .doc, .docx, .xls, .ppt, .bmp, .gif, .jpg, .png, .txt, and .rtf. Scanners no longer have to be WIA or TWAIN compliant. Further, you can now designate a folder that you can save images and documents to automatically regardless of the type of device you used to scan the image or document. If you want, you can disable the Auto Acquire feature.
- You can now rename Document Type Category names if they are attached to a signed document.
- The Document now notifies you when there are more than 40 unfiled documents.

LEDGER

- Several enhancements were made to the Ledger including new columns (entry date, surfaces, check #), adjustable column widths that are automatically saved when you close the Ledger, the ability to sort by and hide columns, a note indicator for payments and adjustments that have a note, tooltips for the column headings, alternate row shading, and a Refresh button on the toolbar.
- When clicking **Enter Batch Payments** from the **File** menu, a new **Batch Payment Entry** dialog box appears with enhanced functionality.
- You can now split payments by multiple family members.
- When you click the **Statement Notes** button, a more detailed message now appears if you have exceeded the number of characters allowed in the **Billing Statement Notes** text box.
- The wording of the Check # field in the **Enter Payment** dialog box was changed to **Check/Payment #**.
- If you have not selected Assignment of Benefits for a patient, you can now set an option in the **Insurance Payment Setup** dialog box to prompt users to post a $0 payment when the claim is created and close the pending claim.
- If a claim has not been created for today's procedures, the estimates in the transaction log appear in red. A tooltip reminds office personnel to create a claim.
- In the **Ledger Colors Setup** dialog box, a new **Restore Defaults** button was added so you can restore the default Ledger colors.

- You can now close pending claims for a selected patient or for all patients who must bill their insurance carriers themselves rather than assign their benefits to their providers. Previously, these types of claims would remain outstanding until providers claosed them manually by posting a $0.00 payment to the claim.

- A new **Year End Recommendations** option was added to the Ledger's **Month End** menu. This option opens a PDF document with year-end recommendations from Dentrix Customer Support.

FAMILY FILE

- You can no longer archive a patient who has a credit balance.

- The **Select Medical Alert** dialog box now has an **Insert Dateline** button, so that you can insert a date in the **Note** text box.

- The **Medical Alerts** dialog box user interface has been improved.

LETTERS/LIST MANAGER

- You can use a new List Manager tool (similar to the one in Collections Manager and Treatment Manager) to create, view, and print customized lists of patient information. The List Manager also allows you to "hide" patients and merge letters for only the listed patients.

- The Letter Merge feature includes a new option that allows you to open a data file in Microsoft Excel or Notepad.

- The **Patient Report View** dialog box associated with the Office Manager's Letters feature was redesigned to list all the available data fields in a single tree view. A new **Select All** option was added so you can select all data fields at once. A new **Email** option in this dialog box allows you to specify whether you want to include patients **With Email** addresses, **Without Email** addresses, or **All**.

- A new data field was added where you can specify the date a patient last referred another patient.

- The process of generating letters and lists is now simpler and requires fewer mouse clicks. It is more flexible when using data files and creating journal entries.

OFFICE MANAGER

- In the **Daily Huddle Report** dialog box, you can use a new drop-down menu to specify whether you want to print/batch the Patient Visit Form or the Patient Route Slip.

- The **Source of Payment** list box in the **Dental Insurance Plan Information** dialog box includes several new options that you can select.

- You can now sort the Patient List Report by family by family (guarantor and dependents).

- If opened from the Office Manager and if passwords are enabled, the Office Journal defaults to the staff member logged into Dentrix.

- Peachtree 2000 was removed from the **Export To** list in the **DXPort Setup** dialog box.

- Monitoring when someone previews or prints Day Sheet and Audit Trail reports is easier now. Each type of report has its own record in the Dentrix database and its own series of sequential audit numbers so that you can track each report type individually. Dentrix stores the last audit number used for each report and increments it the next time someone previews or prints a report. The audit number prints in the lower left corner of each report. Each time someone previews or prints a report the audit trail entry now includes the type of report, the audit number, and the date and time stamps of the report. If you have enabled passwords, the audit trail also includes the user name. Knowing who previewed or printed what type of report and when can make it easier for you to identify possible instances of fraud in your office.

- Switching in and out of the Tutor database is much easier than before. After you switch out of the Tutor database, Dentrix automatically reconnects to your practice's live database.

- For insurance payments made for multiple patients or more than one patient in a family, you can list

each patient and the amount paid per patient below the cheque that appears on the Deposit Slip Report and the Daily Collections Report.

- You can now add Clinical Notes to the Patient Notes Report.

- You can now set up and maintain fee schedules from one place. You can edit fee schedules manually, and you can export fee schedules to a Microsoft Excel spreadsheet as a comma delimited (.csv) file.

PERIO CHART

- When you close a month, perio exams are now moved to History so that they can be protected. Once a perio exam is moved to History, it cannot be edited.

PRESCRIPTIONS

- To satisfy the requirements of the Narcotics Safety and Awareness Act, the Prescriptions module now allows providers to record and display patient identification types and their corresponding numbers (driver's licence, health card, passport, and so on). The Act also allows the Ministry of Health and Long-Term Care to track the prescribing and dispensing of all monitored drugs. To learn more about setting a patient's identification type, see "Setting up prescription IDs" in the Dentrix Help.

PATIENT CHART

- The Patient Chart has an enhanced "Refresh" feature that reloads any changes made to setup configurations, such as added/edited procedure codes, multi-codes, provider information, medical cross-coding, clinical note templates, and so forth. You can now refresh these settings without closing and re-opening the Patient Chart.

MISCELLANEOUS

- Dentrix G6 Canada now uses a true client-server database architecture. This architecture adds additional stability and efficiency to the software because the server rather than the workstations now performs the work of retrieving and writing data to and from the database.

- Dentrix G6 Canada now supports ClaimStream, an Internet-based eclaims service, in addition to ITRANS. Through ClaimStream, you can submit claims directly to Alberta Blue Cross, Medavie Blue Cross, and Pacific Blue Cross via the Internet.

- The enhanced **Select Patient** dialog box introduced in Dentrix G2 is now the default for all Dentrix modules from which you can select a patient. If you want to use the simple **Select Patient** dialog box instead, you must select **Use Simple Select Patient in all Modules** in Preferences in the Office Manager.

- You can now create a DDX lab case from the Chart, the Treatment Planner, or the Appointment Book. You can also use any lab with DDX. You must register DDX before using it. Registration is free.

- Receiving updates to your Dentrix products and add-on features has been streamlined. If you are on an active customer service plan, you can receive updates automatically without interruption to your workday through the Dentrix Update Manager.

- Support for Webcam DirectShow has been added to Dentrix to support USB image acquisition devices such as cameras.

- When you first open Dentrix, a "What's New" message appears listing the new features added to Dentrix.

- Your Customer ID now appears in the **About Dentrix** dialog box.

- Processes, such as Month End, utilities, and the Month End Wizard, that require all Dentrix modules to be closed now display a list of all workstations with active modules and the names of the modules.

- The Dentrix logo has been updated and appears in the **About Dentrix** dialog box.

- Dentrix now includes a contact manager called eDex that lets you manage and quickly search for Dentrix contacts, such as patients, providers, staff, labs, insurance carriers, and other contacts. You can search by first or last name, address, email address, or phone number. You can also add custom notes or append notes to a patient note. A button to access eDex was added to the toolbars of most Dentrix modules; a button and graphic was also added to the Dentrix Launcher.

- The toolbar buttons for all modules were given a newer look. The images below illustrate the changes in the Office Manager toolbar from Dentrix G4 to Dentrix G6 respectively.
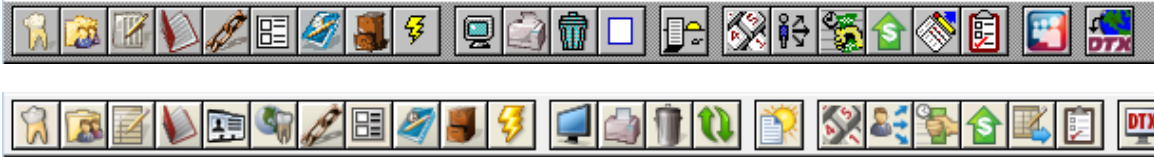
- The Dentrix Launcher icon was modified.

- A Click to Chat button was added to all of the Help menus in the main modules.

- The Spell Checker software was updated.

Installing Dentrix G6 Canada

You must install Dentrix G6 Canada on each computer that runs Dentrix.

Complete the following steps to install Dentrix G6 Canada.

1. If you are upgrading to Dentrix G6 Canada from Dentrix 11.0, G2, or G3, you must first install Dentrix G4 Canada. Your Dentrix G6 Canada installation kit includes software to upgrade to Dentrix G4 Canada on the Dentrix G6 Canada installation DVD. Instructions for installing Dentrix G6 Canada are available in the *Dentrix G6 Canada Installation Guide* in the installation kit and also available in the Dentrix Resource Center (www.dentrix.com/resource-center/).

2. Follow the on-screen instructions to install Dentrix G6 Canada.

   For help with the download and installation of Dentrix G6 Canada, please refer to the *Dentrix G6 Installation Guide* or contact Dentrix Customer Support at 1-800-DENTRIX.

Installing Dentrix G6 Canada on Other Computers

Unlike previous versions of Dentrix, you must install Dentrix G6 Canada on the server first. If you attempt a server installation on any other computer on your network, that computer will become your server. Once you install the software on one computer on your network, you can easily install it on any other computer on your network when you open any Dentrix module.

Using the New Features and Enhancements

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

Ledger

The Ledger includes several enhancements including new columns (entry date, surfaces, check #), adjustable column widths that are automatically saved when you close the Ledger, the ability to sort by and hide columns, a note indicator for payments and adjustments that have a note, tooltips for the column headings, alternate row shading, and a Refresh button on the toolbar.

SPLITTING PAYMENTS BY MULTIPLE FAMILY MEMBERS

You can split payments by multiple family members.

To split a payment by multiple family members

1. From the **File** menu in the Ledger, click **Enter Batch Payments**.

    The **Batch Payment Entry** dialog box appears.

2. Click the **Patient Name** search button, and then select the appropriate patient from the **Select Patient** dialog box.

    The **Enter Payment** dialog box appears.

3. Do the following:
- **Date** – (Optional) Type a date to change the procedure date from the current date.
- **Payment Types** – Select the appropriate type from the list.
- **Amount** – Type the payment amount in dollars.
- **Cheque Number** – Type the number, if applicable.
- **Bank/Branch #** – Type the number if you want it to appear on the Dentrix Deposit Slip.
- **Provider** – (Optional) Select a provider from the list. (Default is to split the payment by provider.)
- **Patient** – Select Split By Family Members. (Default is to apply the payment to the selected patient in the Ledger.)
- **Split Method** – Select one of the following options:
  - **Percentage Payments** – Divides the payment among the providers according to each provider's percentage of the total amount owed.
  - **Guarantor Estimate** – (Default) Applies the payment to providers who have balances as guarantor estimates and ignores provider balances that Dentrix estimates insurance will pay the remainder of.
  - **FIFO (First In First Out)** – Applies the payment toward the oldest completed procedures first.
  - **Equal Payments** – Splits payment amounts equally among all providers with debit balances.
- **Details** – Click to view payment details.
- **Note** – Type a note to document any unusual circumstances related to the payment.
- **Apply To Payment Agreement** – (Selected automatically if the account has a payment agreement.) Clear the option if the payment should not be applied to the payment agreement.

4. Click **OK**.

CLOSING NON-ASSIGNMENT OF BENEFIT PENDING CLAIMS AUTOMATICALLY

A new feature allows you to automatically close pending insurance claims for those patients who are responsible for billing their insurance carriers.

To close a non-assignment of benefit pending claim automatically

1. From the **File** menu in the Ledger, click **Non-Assignment Pending Insurance Claims**.

   The **Non-Assignment Pending Insurance Claims** dialog box appears.

2. Under **Pending Claims**, select one of the following:

    • **Select Patient's Family** – Select to close any outstanding claims for the current patient in the Ledger. To select a different patient, click the search button and select the appropriate patient from the **Select Patient** dialog box.

    • **All Patients** – Select to close all outstanding non-assignment of benefits claims for all or selected patients. A message box appears stating that the list may take several minutes to generate depending on the size of your database. Click **Yes** to continue.

3. Do one of the following:

    • Click **Select All** to close all the claims in the list.

    • Click the claims that you want to close.

4. Click **Mark Selected Claims as Received**.

    A message box appears stating that the selected insurance claims will be marked as "Received."

5. Click **Yes** to continue.

    Dentrix posts the selected claims to the Ledger with a $0.00 dollar payment.

eDex

eDex is an electronic contact manager and directory to which you can attach patient notes. You can use eDex to manage and quickly search lists of patients (active, inactive, or archived), employers, insurance carriers, labs, non-patients, providers, staff, referrals, and any other contact you may want to remember. Using eDex, you can create custom contacts and contact categories to filter the Contacts List or even locate a patient's next appointment.

To open eDex and add a contact

1. In the toolbar of any Dentrix module, click the **eDex** button.

    The eDex window appears.
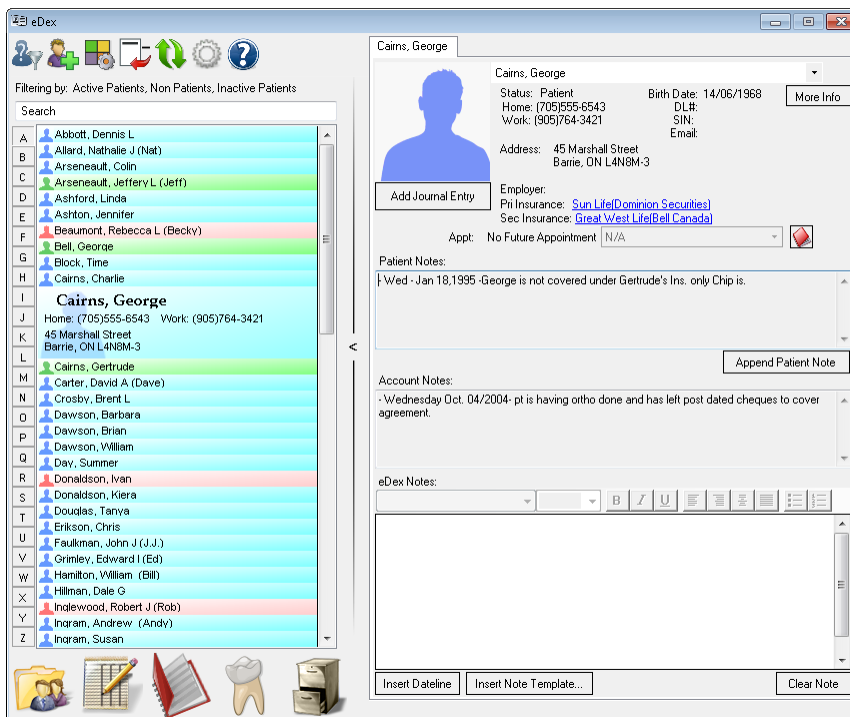
2. In the eDex toolbar, click the **New Contact** button.

The **Add New Contact** dialog box appears.

3. Do one of the following:
   - **Category** – Click the arrow and select a category from the list.
   - **Category Setup** – Click the button and add a category.
4. Type the following **Contact Information**:
   - **Contact Name** – (Since Dentrix alphabetizes the patient list according to patients' surnames, consider entering the contact's surname followed by the contact's given names when you are adding personal contacts.)
   - **Company Name**
   - **Email Address**
5. Type the following **Address Info**:
   - Street 1
   - Street 2 (if necessary)
   - City –
   - PV
   - PC
6. Type the following **Phone Info**:
   - Preferred
   - Work
   - Fax
   - Mobile
7. Click **Save**.

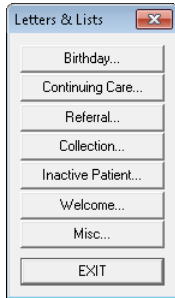# List Manager

You can use the new List Manager (similar to tools in the Collections Manager and the Treatment Manager) to create, view, and print customized lists of patient information. Using the List Manager you can also "hide" patients and merge letters for only the listed patients.

To create a letter using the List Manager

1. In the Office Manager menu, click Letters & Custom Lists.

The **Letters & Lists** dialog box appears.

2. Click the button, such as **Birthday**, corresponding to the type of letter that you want to create.

A dialog box corresponding to the type of letter appears.
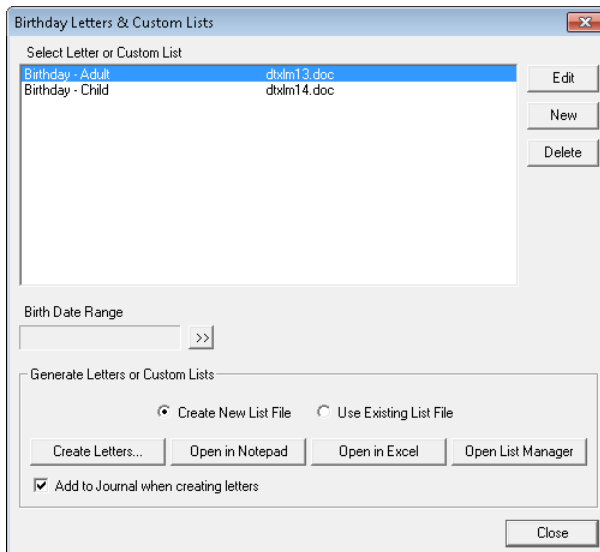
3. From the list, select the letter that you want to create, and then click **Open List Manager**.

The List Manager window appears.

4. In the toolbar, click the **Create Letters** button.

A message box appears.
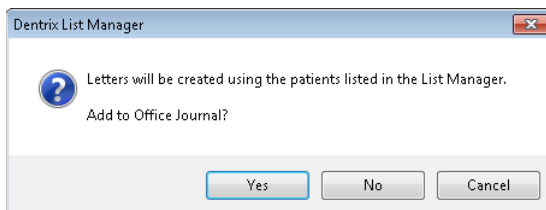
5. Click **Yes**.

Dentrix opens Microsoft Word and creates a letter for every patient listed in the List Manager.

Document Center

New features of the Document Center include being able to acquire documents using any device that supports the following outputs: .pdf, .doc, .docx, .xls, .ppt, .bmp, .gif, .jpg, .png, .txt, and .rtf. You can also save documents automatically to a folder that you designate. In addition, you can use the new screen capture feature to select and capture an area of your computer screen and save the resulting image to the Document Center.

ACQUIRING DOCUMENTS AUTOMATICALLY

Acquiring documents for the Document Center is even easier now. You can acquire documents using any type of device that supports the following outputs: .pdf, .doc, .docx, .xls, .ppt, .bmp, .gif, .jpg, .png, .txt, and .rtf. Scanners no longer have to be WIA or TWAIN compliant. Further, you can now designate a folder that you can save images and documents to automatically regardless of the type of device you used to scan the image or document.

To set up auto file acquire

1. From the **Acquire** menu in the Document Center, click **Auto Directory File Acquire**.

    The **Setup Acquisition Method Defaults** dialog box appears.
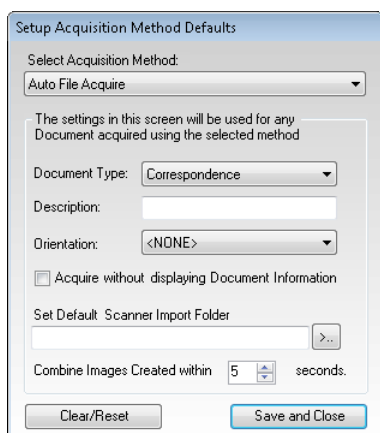
2. Use the following options to set up auto file acquire:

    •   **Document Type** – Select the appropriate type from the list.

    •   **Description** – Type a description of the document.

    •   **Orientation** – Select an orientation from the list. (Applies to X-rays and other images of a patient's mouth.)

    •   **Acquiring without displaying Document Information** – Select to prevent the **Document Information** dialog box from appearing.

3. Under **Set Default Scanner Import Folder**, click the search button.

    The **Browse For Folder** dialog box appears.
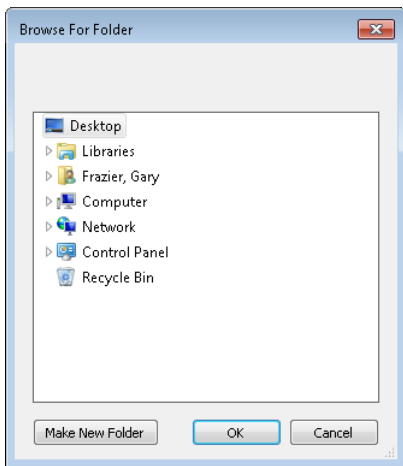
4. Do one of the following, and then click **OK**:
   - Select a folder.
   - Click **Make New Folder**.
5. From the **Setup Acquisition Method Defaults** dialog box, do the following:
   - **Combine Images Created within X seconds** – Select the appropriate number of seconds you want to pass before Dentrix combines several images that you acquired simultaneously into a single document.
   - Click **Save and Close**.

ACQUIRING SCREEN CAPTURES

You can use the new Screen Capture feature to select an area of your computer screen and capture and save the resulting image to the Document Center.

To acquire a screen capture

1. From the **Acquire** menu in the Document Center, click **Screen Capture**.
2. To set up the default settings for screen captures, click **Setup Defaults**.

   The **Setup Acquisition Method Defaults** dialog box appears.
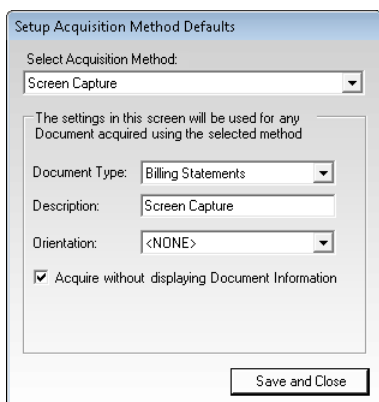
   a. Under **Select Acquisition Method**, select **Screen Capture**.
   b. Select a document type from the list.
   c. Select an orientation from the list, and click **Save and Close**.
3. To capture a screen, click **Start Capture**.
4. Position your mouse pointer where you want to start the capture and drag to capture the image.

When you release the mouse button, the Document Center opens, and the image you captured appears in it.

Appointment Book

From the Appointment Book, you can set procedures complete, post them to the Ledger, and set the patient's next Continuing Care appointment. If necessary, you can now also set procedures complete and post them to the Ledger for more than one provider at a time.

To set appointment procedures complete for an additional provider

1. In the Appointment Book, select the appointment that you want to set procedures complete for.
2. From the **Options** menu, click **Post/Set Complete**.

    The **Set Appointment Procedures Complete** dialog box appears.

3. Select the procedure that you want to set complete for the additional provider, and then click **Change Provider**.

4. Select the additional provider from the sub-menu.
5. Click **Post/Set Complete**.

PROVIDER COLUMNS

You can now hide the provider columns from your view of the Appointment Book.

To hide the provider columns

1. In the Appointment Book menu, click **View**.
2. From the **Select View** dialog box, click **New**.

    The **Select View** dialog box appears.
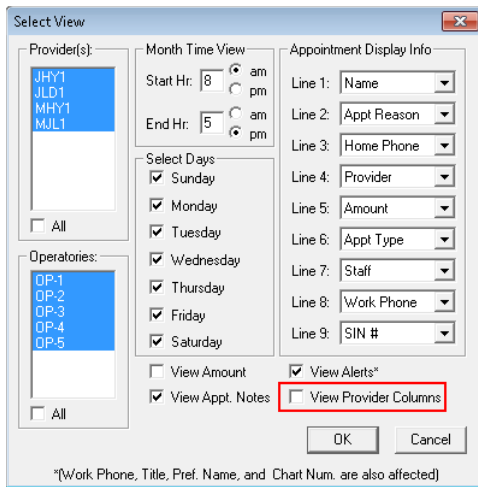
3. Clear the **View Provider Columns** check box, and then click **OK**.

Medical Alerts

You can now save medical alert notes in the notes history. You can also copy medical alert notes to clinical notes, include medical alert notes in the Patient Notes Report, and add patient notes from Questionnaire forms to the medical alert note.

To copy a medical alert note to clicnical notes

1. In the Family File, select a patient.

2. Click the icon in the **Medical Alerts** block.

    The **Medical Alerts** dialog box appears.
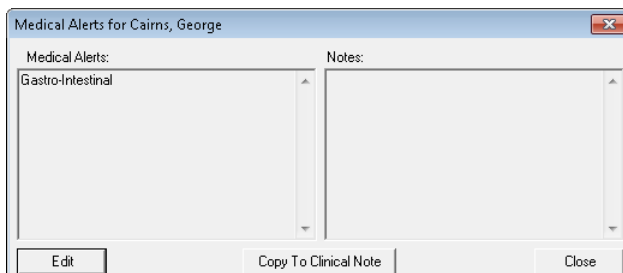
3. Click **Edit**.

    The **Select Medical Alerts** dialog box appears.
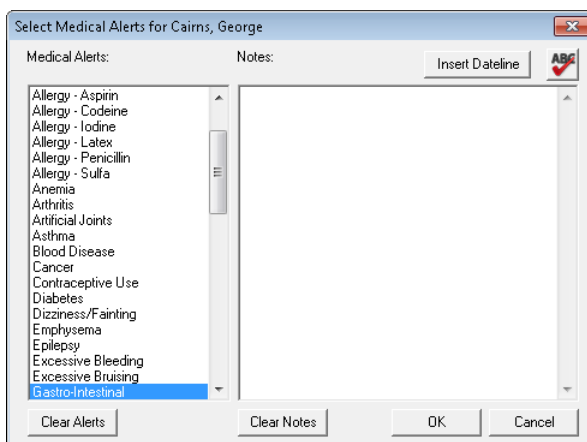
4. To add a note, type it in the **Notes** text box, and then click **OK**.

5. To copy the patient's medical alert and any notes to the patient's clinical notes, click **Copy to Clinical**.

6. Click **OK** to save your changes, and then click **Close**.

Prescriptions

The Narcotics Safety and Awareness Act requires all prescribers to record information, such as the following, when prescribing a monitored drug. The list below is not comprehensive:

- Driver's licence
- Health card
- Passport–Canadian or other
- Provincial or territorial birth certificate
- Certificate of Indian status

Setting up prescription IDs

1. From the toolbar of any Dentrix module other than the Office Manager, click the Prescriptions button.

    The **Patient Prescriptions** dialog box appears.
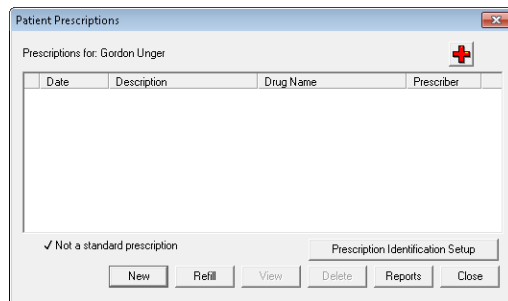
2. Click **Prescription Identification Setup**.

    The **Prescription Identification Setup** dialog box appears.
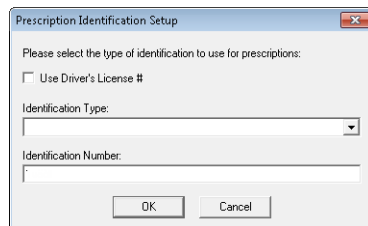
3. Do one of the following:

    - Select **Use Driver's License #**, and then click **OK**.
    - Select the appropriate type from the **Identification Type** list, type the identification number corresponding to the patient's identification type in the **Identification Number** text box, and then click **OK**.

Patient Chart

The Patient Chart has an enhanced "Refresh" feature that reloads any changes made to setup configurations, such as added/edited procedure codes, multi-codes, provider information, medical cross-coding, Clinical Note templates, and so forth. You can now refresh these settings without closing and re-opening the Patient Chart.

Office Manager

SWITCHING DATABASES

Switching out of the "Tutor" database back to your live database is much easier than before. When you close all Dentrix modules when you are in the "Tutor" database, Dentrix automatically reconnects to your practice's live database.

To switch databases

1.   From the **Maintenance** menu in the Office Manager, point to **Practice Setup**, and click **Preferences**.
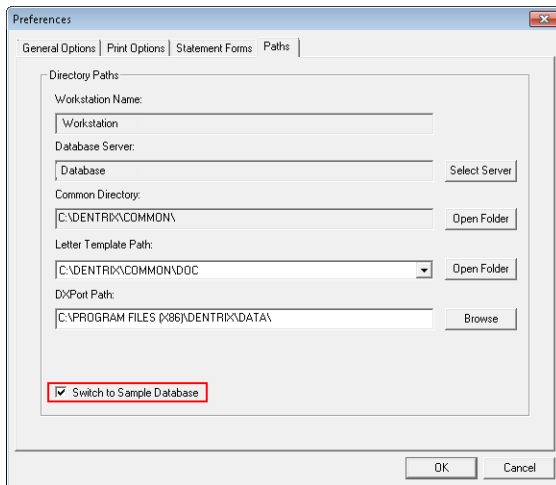
2.   From the **Preferences** dialog box, click the **Paths** tab, select **Switch to Sample Database**, and then click **OK**.

DEPOSIT SLIP AND DAILY COLLECTIONS REPORTS

Often insurance companies send a single cheque to pay for multiple procedures for multiple patients. After entering insurance payments in the Ledger or the **Batch Insurance Payment Entry** dialog box, you can now create a Deposit Slip or a Daily Collections report that lists each patient and the amount paid per patient below each cheque entry.

To create a Deposit Slip Report

1.   From the **Reports** menu in the Office Manager, point to **Management**, and click **Day Sheet**.

The **Day Sheet** dialog box appears.
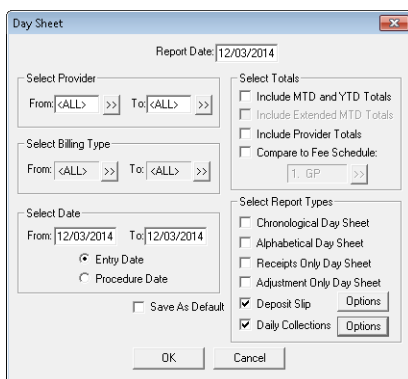
2.   To print cheque details on deposit slips, select **Deposit Slip**, and then click **Options**.

The **Options** dialog box appears.
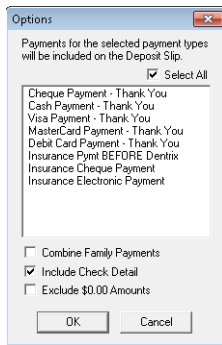
3. Select **Include Check Detail** and click **OK**.

To create a Daily Collections Report

1. From the **Reports** menu in the Office Manager, point to **Management**, and click **Day Sheet**.

    The **Day Sheet** dialog box appears.
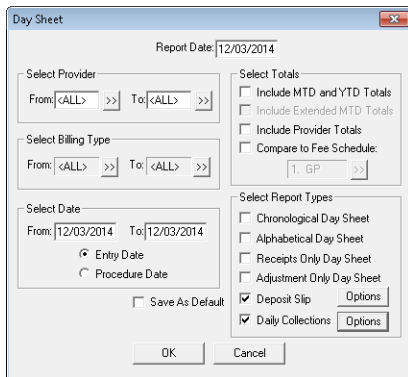
2. To print cheque and/or payment adjustment details on the Daily Collections Report, select **Daily Collections**, and then click **Options**.

    The **Options** dialog box appears.
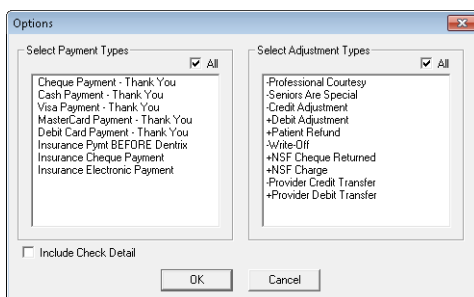
3. Select **Include Check Detail** and click **OK**.

Fee Schedules

You can now set up and maintain fee schedules from one place. You can edit fee schedules manually, and you can export fee schedules to a Microsoft Excel spreadsheet as a comma delimited (.csv) file. For more information, see Fee Schedules in the Dentrix Help.

To set up a fee schedule

1. From the **Maintenance** menu in the Office Manager, point to **Reference**, and then click **Fee Schedule Maintenance**.

The **Fee Schedule Maintenance** dialog box appears.
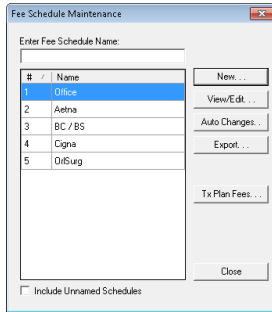
2. Click **New**.

   The **New Fee Schedule** dialog box appears.
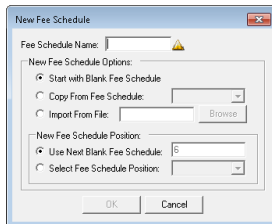
3. Type a fee schedule name in the appropriate text box.

   Note: We recommend that you add your practice's usual and customary fees to Fee Schedule #1. Fees are not pre-assigned in Dentrix.

4. Under **New Fee Schedule Options**, do one of the following:
   - **Start with Blank Fee Schedule** – Select to use a blank fee schedule.
   - **Copy From Fee Schedule** – Select and then from the list, select the fee schedule that you want to copy.
   - **Import From File** – Select to import the fee schedule from a comma delimited (.csv) or Excel file. Select the appropriate file from the **Select file to import** dialog box.

5. Under **New Fee Schedule Position**, do one of the following:
   - **Use Next Blank Fee Schedule** – Select to use the next blank position in the fee schedule list.
   - **Select Fee Schedule Position** – Select and then from the fee schedule list, select where you want the new fee schedule to be positioned.

6. Click **OK**.

   The **View/Edit Fee Schedule** dialog box appears.
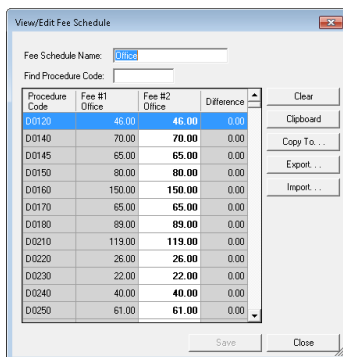
7. Click **Save**.

DDX Desktop

DDX (Digital Dental Exchange) integrates with Dentrix through the DDX Desktop program, which is installed during the Dentrix installation. You can access DDX Desktop not only from Dentrix but also by itself from the Windows desktop icon or Start button (from the Start button, click All Programs, DDX Desktop, and then DDX Desktop).

You can create DDX lab cases from the Patient Chart, the Treatment Planner, and the Appointment Book. You can also update lab case status, pass patient and appointment details from Dentrix to DDX, pass CDT codes for a current case from Dentrix to DDX, make a list of future appointments in Dentrix for a selected patient available to DDX, and attach a Document Center file or image to a DDX lab case.

Note: You must already have or need to sign up for a free DDX account to use DDX Desktop.

Setting up DDX Desktop for first time use

1. Open DDX Desktop by double-clicking the shortcut icon on the desktop.

    The DDX Desktop window opens, and a welcome message appears.

2. Click **Setup**.

    The **Login** page opens.

3. Log in to your DDX account.

    For information about how to log in, see "Logging in to your account" in the DDX Help.

    The **Register Remote Application** page opens.

4. To allow DDX Desktop to access your DDX account, click **I Approve**.

    A message appears.

5. To integrate Dentrix with DDX Desktop, click **OK**.

6. Close all Dentrix modules on all computers, and then click **Yes** to confirm that you want to update the files that control the integration of Dentrix and DDX Desktop.

7. Click **Yes** to confirm that you want to grant DDX Desktop access to your Dentrix data.

    A progress indicator appears.
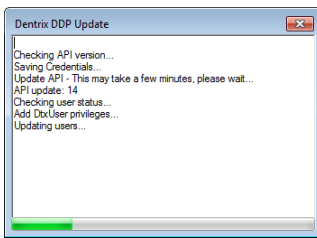
When the update is complete, the portal page of your DDX account opens.
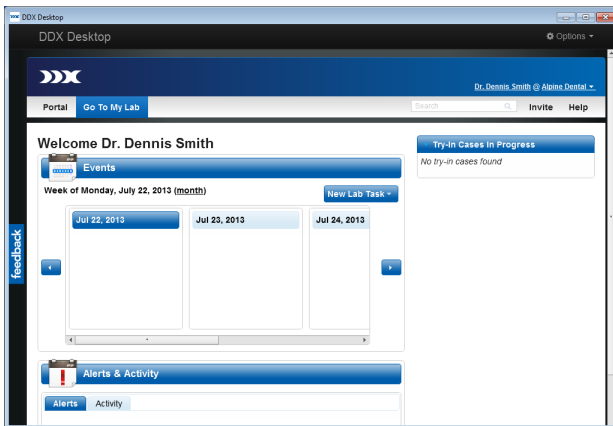
Dentrix G6 Canada Software Changes and Fixes

Dentrix G6 contains the following software changes and fixes:

Appointment Book

- If you selected the Do Not Bill to Dental Insurance option for a head of household and then set an appointment complete for a member of the household who has his or her own insurance, the procedures are not billed. This has been fixed.

- Clearing a procedure in the **Set Appointment Procedures Complete** dialog box did not prevent the procedure from being set complete. This has been fixed.

- The first digit in any field in the **Account Guarantor** text box of the Patient Visit Form was cut off if the patient had a large credit balance. This has been fixed. Completing a continuing care appointment did not advance days. This has been fixed.

- Clicking the Other Appts button goes to the day of the future appointment but does not highlight the appointment. This has been fixed. Archiving a patient does not remove the patient from the Unscheduled List. This has been fixed. The preview for the **Hover Detail Setup** dialog box now looks like the actual Hover window. Breaking an appointment changes the appointment's creation date. This has been fixed. The Scheduled Patients Summary Report listed patients as having no future appointment even though they had appointments scheduled. This has been fixed.

- When selecting treatment plan procedures for an appointment, the procedures are now grouped by treatment plan case.

- If an appointment for an archived patient was selected when you opened the Ledger from the Appointment Book, an error message appeared. This has been fixed, and the error no longer appears.

- When editing continuing care in the Family File, if you set the **Total Time Units** in the **Appointment Time Pattern** dialog box to a value greater than 17, Dentrix would not use that default time value

when scheduling a continuing care appointment in the Appointment Book. This has been fixed.

- After an appointment in the Appointment Book was set complete and you created a new continuing care appointment for the patient with certain settings (**Allow Amount to be entered/ fixed** was selected and **Always Calculate** was not selected), the **Amount** shown in the **Appointment Information** dialog box was not correct. This has been fixed.

- If you pressed an unassigned shortcut key (such as F5) when using the Appointment Book, the production amount (if displayed) would disappear in the top right corner of the Appointment Book. This has been fixed.

- When an appointment that included two procedures set to all chair time (_) was created, the time intervals would be changed to all provider time (X). This has been fixed.

- If you clicked **Find** in the **Appointment Information** dialog box to look for a new appointment time, the **Find New Appointment Time** dialog box did not remember the provider and operatory defaults from the original appointment. This has been fixed.

- The month view in the Appointment Book did not display the office's closed hours or days. This has been fixed.

- The Appointment Book allowed you to set complete future appointments. This is no longer allowed.

- The Appointment Book New Patient status did not automatically update when a new patient was added to a family using a different workstation than the one where the new patient appointment was added. This has been fixed.

- After changing the date on a Flip Tab in the Appointment Book, clicking the Flip Tab didn't take you to the new date. This has been fixed.

- When creating a new continuing care appointment and posting a multi-code, the reason for the appointment did not update using the description for the multi-code but was instead left blank. This has been fixed.

- Purged appointments now appear in the Audit Trail Report.

- If the **Allow Amount to be entered/fixed** option was selected in the Appointment Book, the correct dollar amount did not appear when creating the next continuing care appointment. This has been fixed.

- When printing an Appointment Book view that included a linked event, the wrong icon (+) was used for the event. The correct "link" icon is now used.

- When viewing the Hover Window for a patient with a patient picture, the Appointment Book would stop responding if the patient picture was unavailable (due to the patient picture file being deleted, moved, corrupted, and so on.). This has been fixed.

- The Patient Visit Form would list future appointments in the order they were created, not in chronological order. The form now lists them in chronological order.

- Some customers would see the message "Operatory is already scheduled for requested time" when there was no visible appointment scheduled during the time they were trying to schedule the appointment. This has been fixed.

- When scheduling an appointment for a patient who had more than 26 treatment case visits scheduled, any treatment case visits over 26 would be numbered using letters of the alphabet (A, B, C, and so on.). Numbers are now used.

- The appointment history in the Appointment Book (and Appointment History List in the Office Manager) did not update with changes made after an appointment was completed. This has been fixed.

- Creating a Day Note for the same day from two different Dentrix computers would cause the following message to appear when trying to save it on the second computer: "Another note was recently added for this claim at another workstation. This note cannot be saved." Now a lock is placed on the Day Note message while it is open on one computer; if another Dentrix user tries to open and edit the Day Note, a message tells the other user that the Day Note is open on another computer.

- The **More Information (Dial)** menu item on the **File** menu is no longer enabled when an event is selected in the Appointment Book.

- When eight or more operatories were displayed in the Appointment Book, and the **View Time at Right** option was selected in the Practice Appointment Setup, some of the time digits could overlap, causing 11:00 to appear as 1:00, for example. This has been fixed.

- In the **Provider Setup** dialog box, you can now only assign up to twelve time blocks to a single operatory.

- If a time block was manually moved to a new time and the time block series was subsequently deleted, the Appointment Book would not show the time block but continued to respond as if it was there when scheduling appointments (a message about a time block would appear when scheduling appointments during that time). This has been fixed, and the message no longer appears.

- When a lock was placed on a practice resource (perhaps because it was being edited in the Resource Setup by another user), if a user tried to edit an appointment in that operatory, the message "Practice resource file open at another workstation" would appear, followed by "Invalid operatory ID." These messages no longer appear.

- When dragging an appointment in the Appointment Book, if you pressed Alt+Tab to leave the Appointment Book and then released the mouse button, the appointment would be "stuck" to the mouse insertion point, causing several display issues in the Appointment Book. This has been fixed.

- If an operatory was deleted, it still appeared as the default operatory selection in the Appointment Book's **Appointment Information** dialog box. This has been fixed.

- Appointment history now tracks new continuing care appointments that are moved from the Pinboard.

- If you closed the Appointment Book while a Continuing Care List was generating, a "global lock" error would appear. Dentrix now prevents you from closing out of the Appointment Book while the Continuing Care List is generating.

- The **Continuing Care Attached** field and **Patient Pending Continuing Care** dialog box in the **Appointment Information** dialog box now sorts entries by continuing care date, not alphabetically.

- If you selected an appointment in the Appointment Book, clicked **Find New Appointment Time** on the **Options** menu, closed the **Find New Appointment Time** dialog box, changed the appointment length, and then re-opened the **Find New Appointment Time** dialog box, the appointment length would not update. This has been fixed.

- When moving an appointment in the Appointment Book, if the message "Provider is already scheduled..." appeared and you tried to open the patient information for that patient, a message would appear on multiple Dentrix computers indicating that a patient file was open at another workstation. This has been fixed. Closing the Appointment Book while the Continuing Care List loaded caused an error and locked the system. This has been fixed. Changing the operatory, time, or date of an appointment on the Pinboard did not change the operatory, time, or date in the Appointment Book schedule. This has been fixed.

- "Ghost" appointments have been eliminated.

- When trying to create a patient alert, the user received an error message stating that the current patient's information was no longer valid and may have been edited at another workstation. This has been fixed. The Patient Visit Form did not print if the user selected **All Patients** and **Today** for a date range. This has been fixed. The Last Changed date was not updating. This has been fixed.

- The lab case icon (blue L with white background) did not change when the lab case was received and the Appointment Book view was refreshed. This has been fixed.

- Attaching procedures to appointments with Continuing Care attached doubled the length of the appointments. This has been fixed.

- When you used the Appointment Book's Week View, the Hover window did not display all the information that it should have. For example, the Work Phone, Mobile Phone, Primary Insurance information, Account Balance, and Appt Note did not appear. This has been fixed and the information now appears in the Hover window.

- When you refreshed the Appointment Book with an appointment on the Pinboard, Dentrix sent the appointment to the Unscheduled List. This has been fixed.

- Moving an appointment from the Unscheduled List to the Pinboard and then attempting to move the appointment from the Pinboard to the Appointment Book where the **Unscheduled List** dialog box appeared caused an error. This has been fixed.

- Attaching a treatment procedure to a patient in the Appointment Book and then deleting it caused the production amount displayed in the Appointment Book to be incorrect. This has been fixed.

- On the **Appt** menu of Appointment Book's Unscheduled List, the **Purge Appts** option has been spelled out to be consistent with other options on the menu.

- If an appointment in the Appointment Book specified non-default fees, and you selected the **Always Calculate** option in the **Practice Appointment Setup** dialog box, after setting an appointment complete, the appointment fees displayed in the appointment block reverted to the default fees. This has been fixed.

- When you set a multiple-procedure appointment complete and then scheduled a new recall appointment when prompted, the default time assigned to the new appointment was incorrect. Dentrix used the old appointment time (based on all the attached procedures for the old appointment) instead of calculating a new time (based on the procedures of the recall appointment). This has been fixed.

- When you moved an appointment from the Pinboard or Appointment List to the Appointment Book, the appointment length would be wrong if the default interval was set to a value other than 10 minutes. This has been fixed.

- The **Select Initial Reasons** dialog box in the Appointment Book required scrolling in order to see all the available options. This dialog box has been redesigned so scrolling is no longer necessary.

- The scheduled production amounts for an appointment in the Appointment Book did not update if you changed attached treatment plan amounts. This has been fixed.

- When you archived patients, Dentrix deleted their completed appointments from the Appointment Book. This has been fixed.

Collections Manager

- If you displayed all collection results in the Collections Manager and then switched to a filtered view (one that excluded some payment agreements or future due payment plans, for example), the Collections Manager would display incorrect information for certain patients. For example, it would display information for a patient in the previous list as the information associated with the patient in the new filtered list. This has been fixed. The Collections Manager did not display the correct name list. This has been fixed.

Document Center

- Keyboard shortcuts were added to the Document Center's **Acquire** menu.

- Received an error message when trying to print a rich text format (RTF) document. This has been fixed.

- When exporting images from the Document Center, if you specified a different file type than the current file type, the Document Center would save the file using the specified file extension but would not convert the file to the new format specified. This has been fixed.

- Could not preview images if they had different regional settings when they were imported. This has been fixed.

- The Document Center could import, export, and email HTML and XML files, but these file types could not be previewed or printed. This has been fixed.

- If more than 40 items are present in the Unfiled Documents list when the Document Center is closed,

a message now appears and gives you the option of opening the Unfiled Documents list. Problems that prevented you from printing documents from the Document Center tree to the Document Center printer driver have been fixed.

- Printing labels to the Document Center Printer using the 5160 mailing labels option would send 33 labels instead of 30. This has been fixed.

- Using the **Combine** option to merge two or more documents in Unfiled Documents caused the second document to display a gear until it was manually refreshed. This has been fixed.

- Pasting text from Microsoft Word into the Document Center and then printing would cause an error message to appear. This has been fixed.

- When attempting to export a document from the Document Center and replace an existing file with the same name, the Document Center would not replace the file. This has been fixed.

- If you set the Document Center **Statement Count** to a value that was less than the number of the actual number of billing statements being printed to the Document Center, some statements did not appear correctly. This has been fixed.

- Signing a document in the Document Center and then clicking **Refresh** would cause the **Export** button to become disabled. This has been fixed.

- After setting the file attributes of a file in the Document Center to "Read-Only" or "Hidden," the Document Center would no longer import PDF files. This has been fixed. The medical claim form now includes the medical procedures and medical fee schedule, rather than the dental procedures and dental fee schedule.

- A number of scanners set up to use WIA or TWAIN did not function properly. This has been fixed with the auto-acquire feature. Using this feature, you can have a scanner save supported file types (.jpg, .pdf, .bmp, .png, .doc, .xls, and so on) to a folder you specify.

- The Send Document(s) and Export Document(s) options in the File menu are not available when an image is attached to a claim. This has been fixed.

- Text files attached to claims incorrectly produced the "Attachment file . . . not found!" error message. This has been fixed.

- The Document Center printer was not properly registered during installation. This has been fixed.

- Received the error message "Error creating attachment" trying to acquire a PDF file automatically. This has been fixed.

- When you viewed any OLE document type in the Document Center, the viewer wrote the file to the TEMP folder, but in some cases would not remove the file after viewing or closing the Document Center. This has been fixed, and the file is now removed from the TEMP folder after viewing.

- The right-click shortcut menu in the **Notes** text box (with options for Cut, Copy, Paste, and so forth) that was available in earlier versions of Dentrix was not available in the G4 version. This shortcut menu has been added back to the **Notes** field. The **Type** field for claim attachments in the Document Center now defaults to **Supporting Info** as it did in Dentrix G2 and prior versions.

- When using the Logitech QuickCam Chat camera on a Windows 7 computer to capture an image using the "Quick Scan" button, Dentrix displayed the message, "Error to set capability value." This has been fixed, and the error no longer appears.

- You could customize the Unfiled Documents toolbar in the Document Center, but Dentrix did not save the toolbar changes after closing the Document Center. This has been fixed.

- When you attached a patient to a document in the Document Center, if you attached more than one patient in the **Modify Document Attachments** dialog box, an unhandled exception error could appear and cause the Document Center to close. This has been fixed.

- After you modified a document in the Document Center that was attached to more than one patient, if you selected another document, you were not prompted to save the changes you made to the original document. This has been fixed.

- If a document in the Document Center contained slashes ("/" or "\") in the document description, such as a date (05/12/2012), you could not export the document. The **Send Document(s)** button and

Send Document(s) on the **File** menu would not respond when clicked. This has been fixed.

- When you acquired new images in the Document Center, the **Modify Document Attachments** dialog box opened behind the Document Information window. This has been fixed, and the dialog box now opens in the foreground as it should.

- When you attempted to capture and import an image with a webcam using the OEM dialog box, after the **Document Information** dialog box fields were filled out and submitted, the **Quick Scan** dialog box did not close, and Dentrix appeared to not complete the import. The Document Center could only be closed through the Windows Task Manager. This has been fixed.

- You can use a multi-function printer, such as the Dell 2335dn laser printer, to print reports. You can also scan multiple documents and color images to the Document Center.

Family File

- In the Family File's Continuing Care module, setting the filter to display "All" showed all patients in the database, not just those in the currently selected family. This has been fixed, and the Continuing Care module now shows only patients in the current family.

- When deleting a patient, the Family File now checks to see if the patient record includes any signed documents, clinical notes, questionnaires, or Document Center Files and asks if you want to continue if any of these are found.

- When selecting a **Carrier** under **Select Primary Dental Insurance Plan** in the Family File, if two plans had the same name, the first one listed would be highlighted by default (even if it wasn't the one assigned to the patient). If you clicked the double-arrows next to **Carrier** and then clicked **OK** or pressed Enter, Dentrix would change the patient's insurance to the default plan that was highlighted. This has been fixed. The **Select Payor ID** dialog box loaded slowly. This has been fixed.

- When using the New Patient Appointment method to add a new patient, if you then added a family member with a Non-patient status to the family, Family File would record the additional family member as a family referral. Family File no longer records it as a referral.

- You can add more than 18 patients to a family when you archive some of the patients in the family. This has been fixed.

- The error message, "Cannot open patient file" would appear when closing Family File if the Dentrix Help window was open. This has been fixed.

- If a long e-mail address (longer than 40 characters) is entered for a patient, the **More Information** dialog box now includes ellipses points (...) to represent the part of the e-mail address that is too long to appear in the field.

- When using the **Advanced Search** tab in the **Select Patient** dialog box, you can now open the patient records for archived patients.

- If Continuing Care was attached to an appointment in the Appointment Book, when you viewed the **More Information** dialog box in the Family File for that patient, the **Provider** field under **Continuing Care** would be blank. This has been fixed.

- If the **Practice Resource Setup** dialog box was open on any Dentrix computer when you tried to change patient information in the Family File, you would see a message stating that a resource file was open. (This scenario could also cause other error messages to appear.) If you cancelled the message, Dentrix would save your patient information changes anyway. The lock was unnecessary and the messages no longer appear in this scenario.

- Archived patients were listed in (and could be selected from) the **Previously Selected Patient** list, but their patient information could not be opened for editing. This has been fixed, and archived patients are no longer listed in the **Previously Selected Patient** list.

- When printing a Referral Label from the Referral box in the Family File, no space was added between the doctor's middle initial and last name. This has been fixed.

- Could not simultaneously edit the same Continuing Care Type on different workstations for different patients. This has been fixed.

- Could not update the coverage table when adding payment table entries. This has been fixed.
- Patient Medical Alerts are now listed alphabetically in the Family File. The **Do Not Bill to Insurance** option in the Ledger was selected when the patient's appointment was set complete even though that option was cleared in the Family File if the patient's insurance was not the same as the guarantor's. This has been fixed.

Installation

- When you installed a Dentrix software update on some computers, the Smart Update Installer displayed an error message stating that it "encountered a problem and needs to close." This has been fixed.
- When you installed or upgraded Dentrix on a computer with an Adobe Flash player version higher than 9.0, the following error message appeared: "Error 1904. Module failed to register. HRESULT -214722043. Contact your support personnel." This has been fixed. With the Dentrix G6 installation, if the appropriate Adobe Flash player is already installed, it will not re-install the Flash player or display an error message.

Ledger

- Procedures were posted in reverse order. This has been fixed.
- Insurance claim adjustments were posted to the wrong patient account. This has been fixed.
- When the amount of a payment exceeded the current aging amount, the aging amount under **MTDCur** in **Receivables Analysis** could add up to more than 100%. This has been fixed.
- Procedures selected as Do Not Bill to Insurance appeared as an outstanding balance to insurance. Expected amount from insurance showed correctly as $0.00. This has been fixed.
- You could change which patient to apply a payment to even though a procedure had been moved to history. This has been fixed.
- If a Future Due Payment Plan was set up, charges were posted at month end even though a payment wasn't due that month. This has been fixed.
- The Audit Trail Report included an audit record for a split payment even if the payment was not split. This has been fixed.
- When printing the Payment Agreement Coupon Books and the Payment books for the future due payment plans, Dentrix would truncate the name of the office after several letters. This has been fixed.
- When typing notes after double-clicking a procedure in the Ledger, if no claim was attached, you could press Enter to move to a new line. However, if there was a claim attached, pressing Enter would close the **View Procedure Attached to an Insurance Claim** dialog box but save what was typed. Now, pressing Enter always moves to a new line in the notes without closing the dialog box if it is open.
- If you began the process of posting an insurance payment in the Ledger, but then opened a different patient in the Ledger before clicking **OK/Post** to complete the process, when you subsequently posted the payment for the first patient, it would not post to the correct patient. This has been fixed.
- Posting an additional payment to a claim already in history using the same cheque number would put the new payment into history also and combine it with the previous payment. Now, a new payment is added to the Ledger.
- In the **Billing/Payment Agreement Information** dialog box, the **Balance for PA** amount would be different depending on whether the payment agreement was created in the Ledger or the Family File. If the Ledger was used, the **Balance for PA** amount would display the Family Portion of Balance. If the Family File was used, the **Balance for PA** amount would display the Family Balance. The field now displays the Family Portion of Balance regardless of where the payment agreement was created.
- Posting a multi-code for the same patient on two different Dentrix computers at about the same time

would cause the message "A necessary file is in use" to appear for a couple of minutes. This has been fixed.

- The **Do Not Bill to Dental Insurance** option in the **Procedure Code Editor** dialog box is now reset if the posted code is changed.

- If you deleted a claim and then used a different computer to modify a note on a procedure attached to the deleted claim, the Ledger would display the error message, "An Insurance Claim That Was Previously Created For This Procedure Cannot Be Found." When this happened, the database would need to be repaired. This has been fixed.

- When posting an insurance payment, if the **Patient Information** dialog box from the Family File was open for the patient, Dentrix would display a message saying that the patient file was open at another workstation. After clicking **Cancel**, this message would re-appear three more times, followed by a message saying that the patient information was no longer valid. The Ledger would then clear the selected patient information while leaving the claim open, post the insurance adjustment but not the payment, and leave the claim set to Sent. This has been fixed; the error messages and file locks work properly and only when needed.

- When posting an insurance payment, if the **Patient Information** dialog box from the Family File was open for a subscriber, Dentrix would display a message saying that the patient file was open at another workstation. After clicking **Cancel**, Dentrix would display messages saying it could not read the patient file. This has been fixed; the error messages and file locks work properly and only when needed.

- When attaching images to a claim using Dexis Integrator, if you double-clicked on the image button instead of single-clicking, the Ledger would stop responding. This has been fixed.

- If the path to the Dentrix program files was C:\Program Files\Dentrix and a file with the name "program" existed in the root of the C: drive, the Month End Wizard would not launch. This has been fixed.

- If a patient had primary and secondary insurance with a primary insurance claim in the Ledger, if secondary insurance was cleared from the Family File, there was no way to update the primary insurance claim to reflect this change. This has been fixed.

- Orphaned claim estimates were incorrect. This has been fixed.

- When you print a Walkout Statement and select the Print the Doctor Recommendation option, all supported versions of Word are now able to launch and print the document.

- When printing a Walkout Statement with a Recommendation Document, Microsoft Word now closes after it has finished printing.

- The **Split Claims** dialog box displayed amounts incorrectly. This has been fixed.

- Under certain conditions, procedures that involved multiple surface entries were not being posted correctly in the Ledger. This has been fixed. If you printed a Walkout Statement with 21 to 24 procedures in the Ledger with the **Family Walkout** and **Print Doctor Recommendations** options selected, an additional blank walkout statement printed with the text Procedure Recommendations printed over the text Statement of Services Rendered. This has been fixed.

- If you print a claim with a postdated procedure for a tooth with surfaces and a current date procedure with no surfaces, the surfaces print for both procedures. This has been fixed.

- The secondary insurance override was blank when the user clicked the **All (with running balance)** option in the **View** menu. This has been fixed.

- Clicking the Fast Checkout button in the toolbar opened the wrong dialog box. This has been fixed.

- Totals were incorrect when split payments were posted. This has been fixed.

- Splitting payments caused an error message to appear. This has been fixed.

- Splitting payments by family members showed only part of the payment. This has been fixed.

- Dentrix previously let you delete a patient even if the patient had a pending payment adjustment or other transaction posted to the Ledger. This left unresolved transactions in the database and

calculation issues for Dentrix. This has been fixed, and Dentrix now displays a message stating that you cannot delete the patient because the patient has unresolved transactions.

- When you selected the **Auto-Receive Secondary Claim if No Pending Ins Estimate** option in the Ledger and then posted a partial payment and write-off equal to the full amount of the claim, the Ledger did not auto-receive the secondary claim as it should. This has been fixed.

- A certain sequence of procedure posts followed by certain changes to those posts in the Ledger could result in a "positive payment" in the Ledger. This should not be allowed; all payments in the Ledger should post as negative values. This has been fixed, and "positive payments" in the Ledger are no longer possible.

- The error message, "A Dentrix module is still active. Close all Dentrix modules except Ledger before performing this function" appeared when you ran Month End Update after posting a payment to a claim. This has been fixed.

- Once you moved an adjustment attached to a claim to history, you could no longer access it to view its note. This has been changed, and you can now open the **Enter Adjustment** dialog box to view the note; however, all options are disabled to prevent changes.

- The tab order in the Ledger's **Single Billing Statement** dialog box has been changed.

- When you posted a payment or adjustment in the Ledger's **Enter Adjustment** dialog box, Dentrix allowed you to delete the patient name in the **Patient** field (using the Delete key, Backspace key, or **Delete** option on the shortcut menu). This produced several undesirable results: the payment or adjustment only appeared in the Ledger if you viewed **All with Running Balance**; the balance was correct in the Ledger but the payment or adjustment would not appear on the Day Sheet, creating totals issues for the customer; other reports were also affected. This has been fixed, and you can no longer delete the patient name in the **Patient** field.

- When you posted a procedure to a range of permanent teeth in the Ledger, Dentrix let you use a hyphen to separate the range. However, if you tried to use a hyphen to separate a range of primary teeth, the Ledger displayed an "Invalid range" error. This has been fixed.

Office Journal

- If passwords are enabled and the Office Journal is opened, the logged in user is not automatically selected. This has been fixed.

- If you deleted a billing statement from the Office Journal and recreated it, Office Journal would not refresh to show the new billing statement. This has been fixed.

- If you added an Office Journal note with the same Date, Time, and Type as another Office Journal note, the message "Error adding record to Journal table: 2" would appear. This message no longer appears.

- Printing Office Journal entries for a provider would, under some circumstances, cause the report to print with the wrong provider's name at the top. This has been fixed.

- A broken appointment in the Office Journal now includes the appointment reasons as part of the description.

- Opening the Office Journal from the Family File after adding a specific note in the **Billing/Payment Agreement Information** dialog box would cause Dentrix to display a "Runtime Error!" This has been fixed.

- An Office Journal entry appeared for patients who were referred to the doctor rather than for the patient who made the referral. This has been fixed.

- Patient alerts triggered by **Add to Office Journal** are now displayed when an Office Journal entry is added using the **Add Journal Entry** button in the **More Information** dialog box. Received error message "Unspecified error" when viewing billing statement entries. This has been fixed.

Office Manager

- Could not set a procedure's time unit to 0 in the Procedure Code Editor dialog box. This has been fixed.

- Patients with credit balances were excluded from the Referred By Doctor/Other Report. This has been fixed.

- If a patient had two Continuing Care appointments, the letter merge function incorrectly pulled the earliest dated appointment for the postcard reminder.

- Selecting a Continuing Care Type with no description in the **Patient Report View** dialog box and then merging a letter caused all patients with a Continuing Care Type to appear on the View List. This has been fixed.

- If you performed a letter merge and a patient had an unscheduled and a scheduled appointment in the selected date range, the patient was excluded from the search. This has been fixed.

- Letter Merge and Quick Letters now support long filenames to integrate better with files created in Microsoft Word. Fields where these filenames appear have also been extended.

- In the Office Manager's **File** menu, the **Clear (Deselect All)** and **Refresh** options did the same thing. The **Clear (Deselect All)** option was removed, and the **Refresh** option was renamed to **Refresh/Clear**.

- When merging letters in the Office Manager, the position of some fields in the **Patient Report View** dialog box have changed, making it easier to specify the names of the merge files.

- In the Office Manager, the **Letters** menu name was changed to **Letters & Custom Lists**. The name of the dialog box that opens was also changed.

- Running a letter merge for a range of insurance carriers with the same name shows all patients for all plans instead of only showing the patients on the plans within the specified range. This has been fixed.

- Setting the "Existing Patients with NO appointments in date range" and the "Without Attached Appointment" options and then performing a letter merge causes the "No records that match your query were found" error message to appear. This has been fixed.

- The Office Manager's Label Printer settings were not being saved after you closed the Office Manager. This has been fixed.

- In the Patient Summary Report, the number/count that was reported for **Age 65 and Over** and for **Age 12 and Under** was not correct for the month of February. This has been fixed.

- The Office Manager would stop responding if you tried to add more than 97 providers at one time (one after another, without closing the Office Manager). This has been fixed.

- In the Office Manager's **Preferences** dialog box, if any of the forms on the **Statement Forms** tab was not selected, the Month End Wizard would not show all available options. This has been fixed.

- In the **Dental Insurance Plan Information** dialog box, the **Change Plan for All** and **Add As A New Plan** options did not appear after you edited the **Employer** field. This has been fixed.

- In the Office Manager, if you defined a fee schedule name that was seven characters long and then edited the fee for a procedure from the **Procedure Code Setup** dialog box, fees under $10 would not be displayed. This has been fixed.

- If you tried to add more than 250 staff members, Dentrix displayed an error message but did not explain the limitation. Now Dentrix displays a message letting you know that additional staff members can't be added.

- **Appointment Type** definitions can now be deleted in the Office Manager.

- Adding a student status to medical insurance before the patient's insurance information was added would cause a "Cannot write" error message to appear. This has been fixed—the error message no longer appears.

- Importing a custom-created fee schedule that had only two columns could cause an "Unhandled exception" error message. This has been fixed.

- In the **Fee Schedule Setup** dialog box, if you selected a fee schedule and pressed Delete, the fee schedule would immediately be removed from the list without warning. This has been changed—the Delete key no longer does anything in this dialog box.

- If you marked a procedure as "Invalidated," using the Office Manager's Batch Insurance Claims tool would still create a claim for the procedure. This has been fixed.

- In the **Print Preview** dialog box, clicking **Default Page Size** now displays the document using the default page size (when the dialog box was opened) rather than using a smaller page size.

- Inactivating a staff member attached to an appointment with a status definition that is blank would cause an "Application Error" message to appear. This has been fixed.

- When performing a letter merge, clearing certain options would automatically clear other options. Now, letter merge options are only cleared or selected when you click them individually with the mouse.

- When merging letters, if the **Insert Multiple Referrals in Single Letter** option was selected in the **Select Referred By Range** dialog box in the Patient Report View, Dentrix would display a "Header Record Delimiter" error followed by multiple "Invalid Merge Field" error messages. This has been fixed.

- When using the merge field «PP_Payment_Date», the merge would pull the First Pay Date instead of the actual Future Due Payment Due Date. This has been fixed.

- The letter merge does not include all of the appointments for patients having multiple appointments on the same day. This has been fixed. When a new patient is created and does not yet have a **Last Visit Date** because no work has been completed, letter merge data files would report the **Last Visit Date** the same as the **First Visit Date**. Dentrix now leaves the **Last Visit Date** blank in this situation.

- Selecting the **Referred To** letter merge filter would clear the **Pri Dental Ins** filter option. This has been fixed.

- Opening the **Referred By** dialog box during a letter merge would clear the letter merge **Appointment** filter. This has been fixed.

- When specifying a data range in a letter merge or query, if the beginning field for the range was left blank, the query results could be inconsistent and incorrect. This has been fixed.

- All letter templates have been updated to improve the writing.

- When using letter merge, sometimes one patient's Due Date would also be used with the next patient if that patient had a blank **Due Date** field. This has been fixed.

- When using letter merge to create a "Prospective Patients" letter, if you selected the **Prospective patients with appointment in date range** option in the **Appointments** filter in the **Patient Report View** dialog box, no practice data was in the merged letter. The practice data is now included.

- Defining 20 Continuing Care types in Dentrix and selecting the **ALL** check box for Continuing Care types when doing a letter merge would cause the resulting merge data to contain incorrect results and cause other problems. This has been fixed.

- Using Quick Letters to print a letter would cause any documents that were open in Word to close without warning. This has been fixed. Totals for end balances and total receivables in the Practice Analysis Report did not match. This has been fixed.

- Copying procedure notes to clinical notes added two blank lines between multiple procedure notes. This has been fixed.

- The Treatment Planner icon was enabled, even though a patient was not selected in the List Manager. This has been fixed.

- When you previewed some reports in Dentrix Print Preview, the report background occasionally disappeared until you used the zoom feature to zoom in on the report. This has been fixed.

- When you selected **Compare to Fee Schedule** in the **Day Sheet** dialog box and printed a Day Sheet, the tooth ranges printed as random symbols. This has been fixed.

- When you deleted a medical alert in the Office Manager and selected a replacement alert, the replacement alert was not assigned to patients that had the old alert assigned to them. Instead, a blank medical alert appeared. This has been fixed.
- In the **Practice Passwords Setup** dialog box, four password rights were renamed "Generate Aging/Patient Balance Reports," "Generate Appointment Book Views," "Generate Practice Analysis Reports," and "Generate Referral Slip or Recap."
- Entering a very long description for a dental diagnostic code in the Office Manager caused the code to display the wrong information, and the code could not be edited. This has been fixed.
- When running the Inactive Patient List, if you selected either **With Last Visit Before <today's date>** or **With No Continuing Care and Not Future Appointments**, the report did not include the correct patients. This has been fixed.
- An archived patient could appear on the Referred By Doctor/Other Report. This has been changed, and archived patients no longer appear on this report.
- Two items in the Office Manager's **Dentrix Print** dialog box (**P**roperties and All **P**ages) used the letter "P" as the shortcut key. This has been fixed; All Pag**e**s now uses the letter "E" as the shortcut key.

Patient Chart

- The "Image, Open" password security right was not linked to the toolbar buttons on the Image Panel toolbar. From the Patient Chart, you could click **Image > Switch To > Digital X-Ray** and would see the message, "The current user does not have rights," but if you clicked the **Digital X-Ray** button in the Image Panel toolbar, you were granted access. Now both ways of accessing Digital X-Ray respond to the security right consistently.
- If you created a custom procedure code and included a space at the end of the name, the Patient Chart would always post the custom code. This has been fixed.
- The Patient Chart label did not display properly when a middle initial was missing from a patient's name. This has been fixed.
- If you set the Progress Notes panel in the Patient Chart to display expanded notes and then changed to any other chart view or layout, the expanded notes would return to the default notes view. This has been fixed.
- Closing the Patient Chart's Chart Notations while the Lasso tool was still busy caused an "Unhandled exception" message to appear. This has been fixed.
- After a claim was created, the provider could be changed. This has been fixed.
- Retainer crowns for different quadrants were painted inconsistently in the Patient Chart. The upper left and lower right quadrants painted without connection paint between certain teeth; the upper right and lower left quadrants painted with connection paint between some teeth. These are now painted consistently in all quadrants.
- The Patient Chart was loading slowly. This has been fixed.
- If an office upgrades to .NET 4.5.1 and uses Dexis 9/10 and Integrator 3.0, the Patient Chart freezes. This has been fixed.
- Viewing the Patient Chart using the **View by Progress Notes View** after invalidating a posted procedure would cause the invalidated procedure to continue displaying. This has been fixed.
- A partial denture would appear painted inconsistently in the Patient Chart using certain tooth ranges. This has been fixed.
- After a treatment plan containing an extraction is complete, the Patient Chart now displays the extraction correctly by no longer displaying the extracted tooth in the chart.
- After changing the Patient Chart's display setup theme three times, it would revert back to the default theme. This has been fixed.
- When customizing the Patient Chart toolbar (and some other toolbars), if you renamed the Toolbar

in the **Rearrange Commands** dialog box, the toolbar changes were not saved after closing and reopening the Patient Chart. This has been fixed.

- Editing a procedure button image multiple times could cause the file where the image is stored to increase dramatically in size and become corrupt, causing the software to run more slowly. This has been fixed.

- When you set the Patient Chart to **View Progress Notes By Date** and specify a date range for **From** and **To**, the software now remembers the date range the next time you select this option.

- Clinical note categories did not sort correctly when there were more than 24 categories. This has been fixed.

- Clinical note templates that included more than 240 items or more than 1,565 characters in a Response Type would display a message saying the computer was out of memory. This has been fixed.

- If a clinical note had more than 53 lines, it would print a blank first page before (and sometimes after) the clinical note. This has been fixed.

- Patient Chart allowed you to post an update to a completed clinical note that was locked and entered into history through backdating. This has been changed so that clinical notes which were manually moved into history by backdating are locked from editing.

- When editing a procedure that uses a tooth range, if you specified only one tooth for the tooth range, the tooth number did not appear in the **Tooth Range** field. This has been fixed.

- If a procedure had the treatment area set to **Tooth** and the paint type set to **Surface Restoration**, posting the code would cause an "Unhandled exception" error message. This has been fixed.

- The position of a chart notation in the Patient Chart shifted when you switched from Work Chart View to Full Screen View. This has been fixed.

- A date and signatory name were not being added to clinical notes after they had been signed. This has been fixed.

- Clicking **Copy All** only copied one clinical note. This has been fixed. If you clicked the **Refresh** button in the toolbar after copying a medical alert to a clinical note, the alert would not appear in the clinical note unless you closed and then re-opened the Chart. This has been fixed.

- Posting treatment planned procedures as complete from the Patient Chart's Progress Notes caused all notations to temporarily disappear. This has been fixed.

- When using a Clinical Note Template with prompts for "Tooth Select One" and "Surface Select," selecting "Incisal/Occlusal" for the surface added the surface selection as "O" (occlusal). This has been fixed.

- When you selected a billing type in the Patient Chart, updating the Treatment Plan Fees did not update the fees. This has been fixed.

- When you created a clinical note in the Patient Chart, clicking **Insert Dateline** surrounded the dateline with quotation marks: "--------------Wed - 28 Mar 2012--------------." The quotation marks were not inserted prior to Dentrix G3. This has been fixed, and the quotes are no longer inserted.

- Changes customizing the Patient Chart toolbar were not saved after clicking **View > Chart Layout > Save Current Layout**. This has been fixed.

- After recording an implant removal in the Patient Chart, the Patient Chart's Graphic Chart did not update the painting for the tooth to reflect that the implant had been removed. This has been fixed.

- An unhandled exception error occurred when the Patient Chart launched. The chart was empty and the toolbars and panels did not work. This has been fixed.

Perio Chart

- The Perio script was using a trailing cursor that allowed the selection to move ahead to the next tooth while the bleeding selection was still on the last tooth. This made it possible to enter a mobility

measurement while the bleeding selection was on the previous tooth but the selection was on the next tooth. This would apply the mobility data to two teeth. This has been fixed.

- When you charted plaque in the Perio Chart using keyboard shortcuts, the measurements were applied to two teeth simultaneously when the script is ready to chart the next tooth. This has been fixed.

- The **Copy to Clipboard** option in Perio Exam Info now copies the actual perio exam information instead of the defaults for the selected exam template.

- If you opened a new perio exam after inactivating a provider, the new perio exam would use the inactivated provider. This has been fixed, and the Perio Chart now uses the correct provider.

- When patient letters are printed along with a perio exam, Dentrix now adds an entry to the Office Journal.

- When printing clinical notes from the Perio Chart, the Perio Chart would sometimes display a message that it had encountered a problem and needed to close. This has been fixed.

- When you print a perio chart, the chart information now prints with the practice address rather than the provider address (if they are different).

- If you closed Perio after entering a Furcation Grade by clicking the **FG** button, the **Save** message box would not appear. This has been fixed.

- On screen, the CAL measurement would appear in red when a reading exceeded the value you set, but when it printed, it only printed in red if it exceeded a value of 7. This has been fixed, and it now prints in red when it exceeds the specified value.

- The **Print Perio Chart Letters or Charts** password security option didn't restrict access properly. This has been fixed.

- When you right-clicked certain areas of the Perio Chart where no functionality was available, the Perio Chart displayed shortcut menus with selectable options. Some options did nothing; others opened windows that you could not edit. These shortcut menus have been removed.

- When you double-clicked an existing bleeding or suppuration point in the Data Chart and the Data Entry pane of the Perio Chart, the two areas responded differently. The Data Entry pane highlighted the selection, but in the Data Chart, the bleeding/suppuration point marking disappeared. Both areas of the window now highlight the selection.

- If you made changes to the Exam Information in a Perio Chart exam template and saved the template, some changes were not saved with the new template. This has been fixed.

Questionnaires

- Setting an existing questionnaire that contained only PI questions to **Respondents: Provider/Staff** would cause a "System index out of range exceptions" error message to appear. This has been fixed.

- Clicking the **List All** option on and off from the **View** menu caused responses for patients other than the selected patient to appear. This has been fixed.

- The preview pane did not refresh when you selected a new questionnaire. This has been fixed.

- The right-click shortcut menus that were available in Dentrix G3 were not available in Dentrix G4. These shortcut menus have been restored.

- If you tried to delete an employer from a questionnaire and then update the patient information, an error message would appear. A new **Clear Employer** option has been added under **Employer Options** that lets you clear the employer information.

- Clicking **Update Patient Information** to attach a new patient questionnaire to a patient record in some instances could cause the Questionnaires module to stop responding. This has been fixed.

- The **Best Time to Call** field would sometimes appear in red in the **Update Patient** dialog box even though nothing had changed. This has been fixed.

- When a questionnaire form has patient information fields, the **New with Only Patient Info** option is now always active.
- When creating a new patient record in the Family File from a questionnaire form submitted through the web, if the year of the appointment date did not match the current system year, the questionnaire would go back to the select patient screen. This no longer happens, and the user is allowed to finish creating the new patient record.
- If a new patient appointment was selected in the Select Patient dialog box when moving questionnaire responses, an "Unhandled exception" error message would appear. This no longer happens; instead, the message "You must select an existing patient to move responses" appears.
- In certain cases, a form marked as Provider/Staff Respondent could still be uploaded to the office website. When this happens, responses would download and notify users, but the responses would not be visible because they were marked as Provider/Staff Respondent. This has been fixed; Provider/Staff Respondent forms can no longer be uploaded to the office website.
- If you tried to open the Questionnaires module from the Patient Chart when a patient with a long name was selected, the Questionnaires module would open without the patient selected. This has been fixed.
- When using the **Select Patient** dialog box in the Questionnaires module, if you selected a new patient appointment from the **Appointments** tab, nothing happened. This action now displays the message, "A new patient cannot be selected until their information has been updated in the Family File." If you cleared a toolbar from the right-click menu, the toolbar was still selected in the View >Toolbars option. This has been fixed.
- If you tried to open the Questionnaires module from the Patient Chart when a patient with a long name was selected, the Questionnaires module would open without the patient selected. This has been fixed.
- Dentrix previously allowed you to move a signed questionnaire to the same patient and asked if the signature should be removed. When you clicked **Yes**, Dentrix removed the signature from the response. This has been fixed, and you can no longer remove a signature by moving the response to the same patient.

Reports

- Printing a Billing Statement from the **Print Preview** dialog box does not update the **Last Statement Date** field in the Ledger or the Office Journal. This has been fixed.
- In the Practice Advisor Report, the case acceptance totals did not include completed treatment-planned procedures. This has been fixed.
- Excluding days with no transactions from the Provider A/R Report caused the beginning balance to be incorrect when run according to the procedure date. This has been fixed.
- The Deposit Slip showed a single provider for payments split between multiple providers. This has been fixed.
- Totals in the Practice Treatment Case Report were incorrect. This has been fixed.
- The Patient Notes Report was not printing correctly when patients had multiple patient alerts. This has been fixed.
- When running the Practice Advisor Report, if the fiscal month in Practice Setup had a month of 0 or some other invalid value, Dentrix displayed the error message, "Year, Month, And Day Parameters Describe An Un-Representable DateTime." This error message no longer appears.
- If you launched Dentrix from the Dentrix Launcher at system startup, running the Daily Huddle Report or Practice Advisor Report would cause the error message "Cannot find file specified" to appear. This has been fixed.
- If a patient had a Future Due Payment Plan and you selected the **Payment Plan Notes** option when you printed or previewed the Patient Notes Report, the report would not generate. This has been fixed.

- Patients without insurance would appear on the Daily Huddle Report with the **Insurance not Eligible** box selected. This has been fixed, and this box is no longer selected on the report.

- In the Daily Huddle Report, the Prior Day field now reports statistics for the "prior day" that the office was opened. Previously, it would report statistics for the prior day even if the office was closed that day.

- The Appointment Book View Report will not print if the patient's referral has a combined name length of 49 characters. This has been fixed.

- If the Appointment Status definition was missing for certain appointments when running the Daily Huddle Report, an error message would appear and the report would not be generated. This has been fixed; the error message no longer appears and the report will now generate properly.

- On the Daily Huddle Report, some patients who were not past due would still appear under **Patients who have a family Payment Agreement Past Due** on the Scheduled Patients List. This has been fixed.

- The Day Sheet included inactive providers even when the List Inactive option was cleared. This has been fixed.

- The Chronological Day Sheet is now sorted chronologically.

- The Aging Report did not display the Provider IDs when the sort option **By Largest to Smallest Balance** was selected. This has been fixed.

- Generating the Insurance Aging Report for certain groups would produce a report that included other groups as well. This has been fixed.

- The Insurance Transaction Analysis Report in the Practice Assistant did not include secondary insurance information when the **Include Secondary Claims** option was selected. This has been fixed.

- A treatment plan procedure that is attached to a broken appointment now appears on the Unscheduled Treatment Plans Report.

- The Future Due Payment Plan Report would sometimes include an incorrect number of payments and negative payment amounts. These issues have been fixed.

- The Walkout Statement and the Attending Doctor's Statement included the Balance Forward amount without a description. This has been fixed, and the Balance Forward amount no longer appears on these statements.

- If you used the **Full - Credit Card Statement** form when printing single billing statements, the Credit Card information was not included. This has been fixed.

- In the Practice Statistics Report, if you added all the percentages from the age statistics, the total didn't always equal 100 percent. This has been fixed.

- Selecting the **Include patients without production** option in the Referred By Patient Report caused production to display in the report as 0 when it should be the production value. This has been fixed.

- The Analysis Summary Report would sometimes count the Patients Seen line on the report for the same patient twice. This has been fixed.

- The **Batch Insurance Payment Entry** dialog box did not fit entirely on screen if your resolution was set to 1024x768. This has been fixed.

- Clicking **Statement Notes** in the **Guarantor Notes** dialog box didn't do anything if the **Verify Billing Statements to Send** option was selected. It now opens the Insert **Custom Billing Statement Notes** dialog box.

- Printing an Unscheduled Treatment Plan Report for an individual patient would also print reports for all patients with the same last name. This has been fixed.

- If the **Daily Summary** option on the Analysis Summary Report is not selected, this summary section no longer appears on the printed report.

- When a patient had multiple appointments scheduled on the same day, the Route Slip/Patient Visit Form did not print information for the additional appointments on that day. This has been fixed.

- If two adjustment types with the same name were included in the Provider A/R Totals Report, one of the adjustment types would be duplicated while the other would be missing. This has been fixed.

- If the **Include Daily Summary** option was selected when printing the Provider AR Totals Report, Dentrix would display a message that the report was "Printing to Document Center," but the report would not finish printing. This has been fixed.
- When the Include **Check Detail** option is selected, the Daily Collections Report now only includes the check details in the Check Details part of the report to avoid confusion.
- The Referred by Patient Report and Referred to Doctor Report included some names outside of the selected range. This has been fixed.
- The Patient Visit Form now sorts the operatories correctly.
- The Route Slip now sorts all future appointments chronologically.
- The Practice Analysis Report when set to Production By Category would show a procedure code as a category if there were procedures that met the report criteria in the [NONE] category. This has been fixed.
- A Dentrix application error appeared when running an Aging Report with a note exceeding 933 characters and **Print to File** selected. This has been fixed.
- Running the Insurance Carrier List Report with **Include Subscribers** selected did not list the correct number of subscribers. This has been fixed.
- When generating an Employer List, the Office Manager would stop responding if the list contained more than 20,000 patients attached to employees. This has been fixed. The Practice Advisor Report showed all Continuing Care Types on the cover page even if only one was selected. This has been fixed.

Time Clock

- The Time Clock Report data didn't perfectly match the History window data (it was off by a decimal) due to a rounding inconsistency. This has been fixed.
- The Time Clock now updates immediately after deleting a manual Time Punch Entry.
- In the Time Clock tool, the following text was added to the bottom-left corner of the dialog box: "Click to the right of 'In' or 'Out' to add or edit a time."
- When entering a note on the Time Clock's History tab, if you typed a "$," Dentrix would move the "$" symbol to the beginning of the note. This has been fixed.
- The text of the warning message that appeared when you inactivated a provider indicating that all time clock data for the provider will be removed has been deleted. Time clock data is not removed when a provider is inactivated.
- When using the Time Clock's date range calendar on the **History** tab, after entering a time value, if you clicked the < or > buttons to move to the previous or next month, a Save Changes message appeared and the calendar kept scrolling indefinitely. This has been fixed.

Treatment Manager

- Results were inconsistent depending on the date range set in the **Next Appt** field in the **Treatment Manager View** dialog box. This has been fixed.
- The Next Appointment Reason appeared correctly in the Treatment Manager preview window but printed with a "CC" instead of "TP." This has been fixed.

Treatment Planner

- When a treatment plan case that contains a signed consent form is deleted, a warning now appears, advising you to print the treatment plan and consent forms to the Document Center.
- If a patient did not sign the consent form, when the patient opened the consent form later, the **Name**

field under the signature box would be blank. This has been fixed.

- If you created a consent form in the Treatment Planner and cleared the **Do Not Include Procedure Codes on Consent Form** check box, procedures would not appear on the consent form. This has been fixed, and the procedures now appear on the consent form.

- If you selected **Do Not Include Procedure Codes on Consent Form** when creating a new consent form and then attached the form to a treatment case, the procedure codes still printed and blank space was added to the form. This has been fixed.

- Once you assigned a default case note template, you could not remove it. This has been fixed.

- In the **Update Treatment Plan Fees** dialog box, the **All** check box under **Billing Type for Patient's Guarantor** is now disabled (cannot be changed).

- When printing a Treatment Case from the Treatment Planner, if the **Signed Consent Forms** option was selected, the treatment case would print on two pages instead of one. It now prints on a single page.

- Treatment Plan Cases were deleted even if patients had signed a consent form. This has been fixed.

- When you print a Treatment Case, the Compared Fee Schedule header text is different from all the other text on the report. This has been fixed.

- Updating the procedure fees of treatment cases using the Treatment Plan Fees utility changed treatment plan dates to the current date regardless of the status of the treatment case. This has been fixed.

- The Treatment Planner did not automatically refresh after making changes to a consent form. This has been fixed.

- Under certain conditions, printing a Treatment Plan Case included procedures that were never treatment planned. This has been fixed.

- Printing a Patient Treatment Case Report no longer cuts off individual procedure values that are greater than six digits.

- Document formatting in Word was not preserved after using Paste to copy the document into the Treatment Planner Consent Forms. The formatting from Word is now preserved.

- Under certain situations, completed treatment plans could appear on a treatment plan consent form for a new treatment plan. This has been fixed.

- The Unscheduled Treatment Plan Report had an option to choose patients by status, but the Practice Treatment Case Report did not. This option was added to the Practice Treatment Case Report.

- Running a Patient Treatment Case Report and excluding certain columns caused subtotals to display over other information. This has been fixed.

- When printing a Treatment Case, if you selected the **Exclude Completed Procedures** option, all completed procedures were excluded instead of just those in the case. This has been fixed.

- The Treatment Planner now allows you to save a treatment case with a note that is longer than 76 characters.

- When printing a treatment plan, if the Print Secondary Insurance option is selected but the patient has no secondary insurance, that column will not print.

- Several display issues that could be observed when previewing a treatment case have been fixed.

- Adding Default Consent Forms to a treatment case would cause an "Unhandled exception" error. This has been fixed.

- The **Exclude Completed Procedures** option in the **Practice Treatment Case Report** dialog box did not always exclude completed procedures from the report. This has been fixed.

- In the Case Detail panel, the **Other Fee** field showed 0.00 instead of the correct fee for an unnamed fee schedule. This has been fixed.

- The Treatment Plan Case Report was not taking **Special Adjustments** into consideration in the Patient Balance. This has been fixed.

- If you accepted a non-recommended case and rejected the other, any new treatment planned items would automatically be assigned to the rejected case. This has been fixed.

- When signing a consent form in the treatment planner, providers were listed in the **Select Provider/ Staff** dialog box, but staff members were not. Staff members are now listed.

- In the Treatment Case Report, the deductible to be applied was adding the deductible from all patients in family, not just the one patient. It now shows the deductible for just the one patient.

- Using the **Edit or Delete** dialog box to enter an insurance override would not automatically refresh the **Insurance Coverage** amounts displayed in the Treatment Planner. These amounts now refresh automatically when a procedure or amount is edited. Print jobs in the Treatment Planner defaulted to the Windows printer instead of the Patient Chart printer. This has been fixed.

- The text of a double-digit tooth number overlapped the **Description** text box when a treatment case was printed. This has been fixed.

- When you printed a treatment case in the Treatment Planner, an "Alternate Case" footer printed on every case, even if no alternate case was defined. This has been fixed, and the "Alternate Case" footer no longer prints unless there is an alternate case defined.

- The Treatment Case Report (which you access in the Treatment Planner from the **File** menu by pointing to **Print**, and then clicking **Print Treatment Case**) previously allowed you to print up to 114 procedures in the report. This number has been increased so you can now print up to 200 procedures in the report.

- When you printed a treatment case from the Treatment Planner, apostrophes printed as "'". If the insurance name contained an ampersand (&), the ampersand printed as "&". These issues have been fixed.

- If you printed a treatment case in the Treatment Planner without selecting the **Sec Ins Portion** option in the **Select Columns** dialog box, the Compare To fee in the Totals box did not appear. And, if the patient had only primary insurance but not secondary insurance, the Compare To fee in the Totals box also did not appear. These issues have been fixed.

- When printing a treatment case from the Treatment Planner, if you set the **Number of copies** to a number other than one in the **Print** dialog box, the specified number of copies would not print. Only one copy would print. This has been fixed.

- When you printed a treatment case from the Treatment Planner, if the tooth number had two digits, the tooth number overlapped the description. This has been fixed.

- Using a custom procedure range when updating treatment plan fees for all patients would not update the fees. This has been fixed.

- If you saved a fee schedule with no name in the Office Manager's **Procedure Code Editor** dialog box and then applied that unnamed fee schedule (by selecting its number) in the Treatment Planner, the custom value specified in the fee schedule was ignored, and the default fee appeared in the Treatment Planner's Fee column when you previewed or printed the treatment plan. This has been fixed.

- If you printed a treatment case from the Treatment Planner panel and then exited the Patient Chart before the print job finished, the following error message appeared: "Object reference not set to an instance of an object." This has been fixed.

- If you printed a treatment case with a long patient education note, instead of continuing the note on a second page, the Treatment Planner would truncate the note. This has been fixed.

Miscellaneous

- The Net ID has been replaced by the computer name to address Appointment Book refresh issues.

- Dentrix will automatically attempt to restart Dentrix services before sending an "Unable to connect" message.

- The first Dentrix module that you launch on each workstation resolves the server name to an IP address and temporarily stores it for all other modules until they are all closed.

- Dentrix Connection Status shows which Dentrix modules are open on which computers.

- The text of several error messages was clarified and corrected to make them more helpful.

- The Continuing Care module listed patients who did not fit the specified search criteria. This has been fixed.

- If a patient has more than one appointment and different providers perform the procedures, the Clinical Notes post to the same provider if more than one appointment is set complete for the patient. This has been fixed.

- Clicking an appointment in the Appointment Book while generating a continuing care list causes the error message, "Cannot read patient file" to appear. This has been fixed.

- A crash that could occur when installing the Dentrix workstation software has been fixed.

- Downloading eligibilities automatically caused eSync to crash in some offices. This has been fixed.

- If you attempted to open a Dentrix module too many times before the module had time to open, Dentrix would display the message, "Cannot find previous instance." Dentrix no longer displays this message.

- Several issues having to do with file locks and error messages when multiple instances of a patient record are open for editing simultaneously have been fixed.

- Archived patients could be accessed in some modules and certain locations of Dentrix where access should not have been available. This has been changed, and archived patients can no longer be accessed from these areas of Dentrix.

- Duplicate appointments appear in the Appointment List. This has been fixed.

- When the total number of surface selections was more than five, procedures did not show the correct procedure flags. This has been fixed.

- When migrating Dentrix to a new server location, the server path in the registry was not always updated. This has been fixed.

- A problem that caused the message "Module still active" to appear at times when running the month end utilities has been fixed.

- When no patient is selected on the **Appointments** tab in the **Select Patient** dialog box, if you click **OK**, Dentrix now displays the message, "'No patient is selected!"

- You could not print to the Document Center Printer if you were using Windows 8 32-bit. This has been fixed.

- When you mark a lab case as "received" in the Appointment Book using the Received Case button, the "received" status is now updated in the Appointment Book icon, and the received date is now posted in the Lab Case Manager.

- In the **Select Patient** dialog box, if you typed a letter and pressed Enter quickly before any search results displayed, an "Unhandled exception" error would appear. This has been fixed.

- Some patient searches in the **Select Patient** dialog box would return inaccurate search results—for example, if one person's last name (Johns) was the same as another person's last name (John) plus their first initial (S, for Steven).

- A scrolling issue when searching by **Home Phone #** in the **Select Patient** dialog box was fixed.

- When selecting a patient, if you clicked in a blank area of the dialog box so that no name was selected, and then clicked **OK**, an "Unhandled exception" error appeared. This has been fixed.

- The on-screen keyboard (available in several Dentrix modules, such as the Ledger, the Office Manager, the Office Journal, and so forth) did not work on 64-bit operating systems. This has been fixed.

- A workstation that used a mapped drive to access a database on a server would lose its connection to the database after a reboot or a re-login or after coming out of sleep mode. This has been fixed.

- Pressing F1 in most Dentrix modules would open the Dentrix Help. However, in four modules (Lab Case Manager, Office Journal, Treatment Manager, and Collection Manager) F1 did not open the Help. This has been fixed.

- The color of the Patient Alerts button was incorrect did not correspond to the patient's condition. This has been fixed.

- The end balance and total receivables do not match in the Practice Analysis window. This has been fixed.

- The **More Information** dialog box could be opened by Dentrix users who didn't have the security rights to do so. This has been fixed.

- If the patient you created a detailed chart label for didn't have an employer specified in the Family File, an error occurred. This has been fixed.

- eDex closed shortly after loading patients. This has been fixed.

- The **Add Journal Entry** option included inactive providers in eDex. This has been fixed.

- When you enabled passwords in Dentrix, new Office Journal entries did not default to the correct user when you opened the Office Journal from Auto Dial in the Appointment Book. This has been fixed.

- Customers using an Ingenico 6550 or 6580 device with PowerPay were unable to use it as a signature device in the Dentrix Treatment Planner and Questionnaires modules. These devices are now supported in the Dentrix Treatment Planner and Questionnaires modules.

- In Dentrix G6, if you defined different printers for the Patient Chart and the Office Manager, the Patient Chart printed to the Office Manager printer. This has been fixed, and the Patient Chart now prints to the correct printer.

- The Copy to Clipboard toolbar button in Patient Picture did not always copy the Patient Picture image to the Windows Clipboard. This has been fixed.

- After you set an appointment complete in the Appointment Book, if you updated the fees in the Office Manager's Fee Schedule and then re-opened the Appointment Book to view the completed appointment information, the updated fees appeared. Once you set an appointment complete, the fees should not update. This has been fixed, and fees for appointments set complete will not change when you update the Fee Schedule.

- In the Patient Chart and the Treatment Planner, some print options and procedure information were not saved after exiting. This has been fixed.

- If you enabled passwords in Dentrix, then closed Dentrix without closing a link program, such as DentriXlink, and then re-opened Dentrix, you were not prompted for a password. This has been fixed.

- When you perform a search in Select Patient, the entire list of items you are searching for appears in the list, and Dentrix selects the closest match to your search parameters. For instance, if you are searching for patients by their last names and type "C," Dentrix shows the entire patient list but selects the first patient whose last name begins with the letter "C."

- VoicePro 5.0 had a conflict with Quick Letters in Microsoft Windows 7. If you had VoicePro open and then tried to merge letters using Quick Letters, the merge time increased substantially. This has been fixed.

- If you set an Auto Punch Out Time of 7:00 p.m. in the Dentrix Time Clock, the 7:00 p.m. time would not be saved after closing the Time Clock. If you set a time after 8:00 p.m., the Time Clock would save a different time. This has been fixed.

Dentrix G6 Canada Known Issues

Dentrix G6 Canada contains the following known issues:

• When performing a letter merge, if you select a simple merge code, such as <<First Name>> and then double-click Last Name, the <<LName>> code overwrites <<First Name>>. However, if you select <<LName>> and then double-click Salutation (conditional), a complex merge field, it inserts <<Salutation>> after the selected merge code rather than replacing it.

How to Learn More about Dentrix Releases

For more information on how to use the new features in this release, refer to the Dentrix Help. For information about new features and enhancements in previous Dentrix releases, see "What's New in Dentrix?" in the Dentrix Help.

To find essential Dentrix learning resources for your entire dental office team, visit the Dentrix Resource Center. New team members can learn Dentrix basics with on-demand tutorials. Experienced staff can enhance their knowledge of Dentrix with webinars, user's guides, and searchable knowledgebase articles. These resources are free with your Dentrix Customer Service Plan. Log in today at www.dentrix.com/resource-center.