

## **Release Notes:**

### **CS OrthoTrac v14.2 Practice Management Software**

The following is a list of enhancements included and issues addressed in CS OrthoTrac v14.2. All fixes are cumulative (each new release contains all new fixes as well as all fixes from the previous release) and are in addition to the new features detailed in the DPMS What's New section of the Online Help or ReadMe document.

## **Enhancements**

The following is a list of enhancements included in CS OrthoTrac v14.2.

### **Right-Click Options Added to Treatment Card**

Right-clicking in certain areas of the Treatment Card allows the user to select from several editing-related options. The options are: Redo, Undo, Cut, Copy, Paste, Delete, Select All. These options are available on the Notes and Today's Visit sections of the Tx Card, Elastic Wear and Extraction Instructions on the Tooth Chart, and the Notes tab.

### **Treatment History | Walk In History**

Walk In appointments can now be displayed on the patient's Tx History. Select Display Walk In History on the Charting Maintenance dialog box.

### **Treatment History | No Show**

No Show appointments can now be displayed on the patient's Tx History. Select Display No Show History on the Charting Maintenance dialog box.

### **Email Functionality in Outside Doctors Popup**

If a default mail client is properly installed and functioning, OrthoTrac 14.2 allows users to send email directly from the Outside Doctor pop-up.

### **All Procedures Visible in Treatment History**

If there is more than one procedure code in the Treatment History section, each will appear on a separate line if Display Procedure Descriptions in Comment Section check box is selected in Chart Maintenance. If the checkbox is not selected, the procedure codes appear in a single line, separated by commas.

### **Edit Today's Treatment Disabled in Comment Only Charting**

The Edit Today's Treatment function has been disabled when Charting is viewed in Comment Only mode.

### **Use Tab Navigation in Today's Appointment and Next Appointment Sections**

The Today's Appointment and Next Appointment sections of the Treatment Card have been enhanced to allow the user to use the Tab key to navigate through the fields. Use Tab to move forward, Shift+Tab to move back.

### **Comment Only Charting Should Not Show Procedures for the Day**

Procedures and Oral Hygiene images are not displayed when viewing a patient chart in Comment Only mode.

### **Help File Updated**

The online help has been updated to make improvements from previous versions and provide documentation for new features.

### **Add Duration to Export Conflicting Appointments CSV File**

Appointment Duration information has been added to the Export Conflicting Appointments comma separated value (.csv) file.

## **Change Template - Reduce Time**

You can now change the template used to define chair and staff availability to reduce the time one or more of these resources is available.

## **Overwrite Template on Existing Template with Reduced Time**

You can apply a different template with a reduced number of hours to a day/week/month that does not have a conflict. Conflicting appointments are available on the Export Conflicting Appointments report.

## **Use Quick Click Bar to Assign New Template to Day(s) of Week**

You can now use the Quick Click Bar to select and assign a template to a specific day of the week.

## **Copy Template - Reduce time**

You can create a new template (Standard) from an existing template then reduce the length of the work day by multiples of the defined Time Unit.

## **Overwrite Template on Existing Template**

You can apply a template (standard) to a day that already has a template applied but does not have a conflict with the new template. Eligible days appear in Green; days with a conflict with the new template appear in Grey.

## **Copy Template - Increase time**

You can create a new template (Standard) from an existing template then increase the length of the work day by multiples of the defined Time Unit.

## **Change Template - Increase time**

You can change a template (Standard) to increase the length of the work day by multiples of the defined Time Unit. Changing the name will create a new template (Standard).

## **Diary Display**

You have the option to select the new or old scheduler view. To restore the old view, clear the New Style Display checkbox in the lower-left corner of the window.

## **Ability to select up to 12 (or more) search fields in Contact Experts**

The Context Experts utility now allows up to 12 search criteria.

## **Create/Modify Template - Additional Template Fields Populated**

When creating a new template (Standard), some data fields are pre-populated. This includes, Template Type, Doctor Time, and Time Unit. Additionally, if the new template is created from a copy of an existing template, the Color will also be retained from the original template.

## **Conflicting Appointments Report**

Users can now export a file detailing the conflicting appointments when adding days to a template (Standard). The user can choose what is covered by the report: a specific date range, specific dates with known conflicts, or all conflicting dates.

## **Cancelling Appointments That Do Not Cover an Entire Template Block**

If all the appointments within a template block have been cancelled, the template block now appears as clear and completely available for new appointments.

## **Handle Appointment Conflicts in Overwrite Template**

When applying a new template, days that have existing appointments that conflict with the new template will appear in grey in the Add Calendar Days window and the template will not be applied to those days. The template can be re-applied once the conflicts are resolved.

## **Change Add Icon to Add button**

The button to add Future Messages has been changed from the "+" symbol to the word Add. Functionality has not changed.

## **Performance Enhancement**

The OrthoTrac 14.2 code-base has been optimized for efficiency and to reduce the number of database calls. This provides a more responsive application experience for the end user.

## **Show Full Treatment History**

You can now see a full treatment history record without having to click a "Read More" link to display the entire record. This option is controlled using "Show Full Tx History" in Charting Maintenance.

## **Charting Maintenance Option to Show Full Treatment History**

Use the "Show Full Tx History" in Charting Maintenance to display full treatment history in Chart.

## **Display IPR Indicator for Planned & Completed in Aligner Tracking section**

In the Aligner Tracking section of Charting (Edit mode only), clicking an IPR diamond will display a pop-up containing a summary of the IPR information for that tray. The pop-up automatically displays two rows of planned and completed IPRs.

## **Increase Aligner Section Height**

When selected, the Aligner Tracking section of the Treatment (Tx) Card will now automatically expand to display both upper and lower trays. The size can be restored by clicking the control arrow at the top of the section.

## **Disable IPR functionality in Comment Only Charting mode**

IPR functionality is disabled in the Aligner Tracking section of Charting when it is opened in Comment Only mode.

## **Open Procedure Code on Click**

OrthoTrac 14.2 restores the ability to open the Procedure Code window with a single click. Single-click procedure codes are available on the Procedures section for both Today's Appointment and Next Appointment. Similar functionality is available for the Futures section of Next Appointment.

## **Customer-Reported Defects Fixed in CS OrthoTrac 14.2**

The following is a list of issues addressed in CS OrthoTrac 14.2.

### **"Run Time Error 6: Overflow" Error When Accessing Aligner Tracking for Certain Patients**

An error where users would receive a "Run Time Error 6: Overflow" when accessing the Treatment Card certain patients has been corrected.

### **Size and Location of Light Bar Not Saved**

A problem where the size and dock location of the Light Bar is not saved and restored when re-launching light bar has been corrected.

### **Save button not Enabled When Pasting into Today's Appointment Note**

Pasting a note into Today's Appointment did not always enable the Save button. This has been corrected.

### **Inappropriate White Space Below Predefined Buttons in Tooth Chart Tab**

Inappropriate white space below the predefined buttons in tooth chart tab has been fixed.

### **Save Button Improperly Enabled by Selecting Only Tx Comments Mode**

An issue where the Save button was enabled by selecting Only Tx Comments from the View menu has been fixed.

### **Save Changes Link Not Displaying Properly**

The Save Changes link on the Patient Information window was not displaying properly at some screen resolutions This has been corrected.

### **Scroll Bars Improperly Displaying in Tx History**

An issue where the scroll bar appeared when not needed (less than two lines in notes) has been fixed.

### **Zuelke Patient Detail Comparison Report Incorrectly Indicates <No TC>**

A problem where the Zuelke Patient Detail Comparison Report incorrectly showed <No TC> although a TC was assigned to the account has been fixed.

### **Long OH Code Not Displaying Properly Tx History**

Fixed: a long oral health code was not displaying properly in Tx History section.

### **Navigation Disabled if User Returns to Tx History from View All**

An issue where the Previous- Next- Exit navigation panel was disabled when a user navigated back to Tx History from View All window has been fixed.

### **Size and Location of Light Bar Not Retained When Minimized**

A problem where the size and dock location of the Light Bar is not saved when the light bar is minimized has been corrected.

### **Dock Location of Light Bar Not Retained**

A problem where the dock location of the Light Bar is not saved and restored when re-launching light bar has been corrected.

### **Light Bar System Tray Menu Does Not Disappear as Expected**

A problem where the Light Bar System Tray Menu would not disappear has been fixed by adding Cancel as one of the menu options.

### **Light Bar Does Not Close when Patient Flow Closes**

A problem where the Light Bar did not close when the Patient Flow module was closed has been corrected.

### **Light Bar Displays as Date in Task Manager**

A problem where the Light Bar application would appear as the current date in Task Manager has been fixed; it now appears as Light Bar.

### **"Run-Time Error 5: Invalid Procedure Call or Argument" when Opening Comment Only Charting**

An issue caused users to receive a Run-Time Error (RTE) 5: Invalid Procedure Call or Argument"" when opening Comment Only Charting for certain patients has been fixed.

### **RTE13 if User Saves Aligner Tracking with No Start Date**

A problem where the user would a Run-Time Error 13 if Aligner Tracking was saved without a start date. The field is now required.

### **Treatment History Displays Details in Chronological Order**

Problem where "No Show" and other details added in treatment History are displayed in chronological order by dates. The report now correctly displays them in reverse-chronological order (most recent first).

### **Charting Treatment History Does Not Always Display "Read More"**

A large entry in the Treatment History list did not always display the "Read More" link allowing the user to view the full entry. This has been fixed.

### **Balance Transfer Adjustment Posts into Payment Plan but Does Not Create Payment Plan**

An issue where the user was able to execute a balance transfer adjustment which should create a new payment plan but did not. This is caused in cases where, for whatever reason, the patient Total Balance did not equal patient Current Balance. OrthoTrac now validates that Total Balance = Current balance. If the values do not match, the Balance Transfer Adjustment is disallowed, and the user is offered suggestions on how to rectify the two values.

### **Emailing Letters via Outlook 2016 Does Not Work but Produces No Error Messages**

An issue where users with Outlook 2016 installed on their workstations were not able to email letters through OrthoTrac (although OrthoTrac listed the letter as Sent) has been fixed.

### **"Error 521 Cannot Open Clipboard" Error when Printing Letter with Images**

Some users were experiencing an Error 521 – Cannot Open Clipboard error when printing a letter that contained images. This was caused by an operating system bottleneck processing medical images to be included in the letter. OrthoTrac has been modified allow sufficient time for images to be processed by the OS before making additional requests.

### **"Due as of" Statements not Generated for All Eligible Patients**

Some practices were reporting that the "Due as of" statement was not generated for all patients who met the criteria to received it. This problem has been fixed.

### **Chargeable Item Error when Launching Treatment Card When CSOI Not Installed**

An issue which caused a "Chargeable Item" popup to display when the Treatment Card or Charting Maintenance was accessed has been resolved.

### **"UpdateCarrier - There is a Type Mismatch in One of Your Entries" Error**

An issue which caused OrthoTrac to produce an "UpdateCarrier - There is a Type Mismatch in One of Your Entries" and disallow the update has been fixed.

### **Light Bar Not Visible for Some Cloud Users When Location is Changed**

OrthoTrac Cloud users were experiencing an issue where the was not visible if it had been configured to appear at the right edge of the window on a high-resolution workstation and then was subsequently viewed on a workstation with lower resolution. This has been corrected.

### **Elastics Defect - 2 Options Are Selected Instead of 1 from Day, Night, Both**

A defect which allowed both Day and Night to be selected in the Elastics section has been fixed. The buttons now only allow only 1 options to be selected: Day OR Night OR Both (radio button behavior).

### **Zuelke Module Patient Detail Comparison Report Incorrectly Reports Phase II/Additional Phase Starts**

An issue where the Zuelke Module Patient Detail Comparison Report was incorrectly doubling the Phase II / Additional Phase Starts has been fixed. The number of Phase II / Additional Phase Starts now correctly matches the number found in other reports (such as Patient Tracking).