Tracker 11.27 Enhancements Highlights

Helping You Get the Most Out of Tracker

OnLine Tools

Mobile Confirmation Agent – Two-Way Texting

Tracker v11.27 has the option of allowing you to engage in two-way texting with patients. Currently, when a patient sends an invalid text, they are given an automatic text response asking them to call your office. This will happen, for instance -- when a patient tries to respond to a text message to reschedule or cancel. For many offices, this may be preferable. Some offices, however – would prefer to receive the incoming text and provide a 'live' response. Two-way texting makes this possible.

If you would like to begin utilizing two-way texting, please email us @ access@stratumaccess.com – or call the support line so we can get you enrolled.

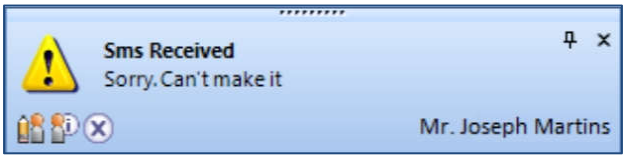
Using Two-Way Texting

Two-Way Texting can be initiated by either (1) the patient – or (2) your office.

Example 1. Incoming text from patient replying to a text confirmation.

When a patient responds to a confirmation text with something other than a 'Y' to confirm, this will generate an incoming message. Incoming messages are indicated in one of 2 ways:

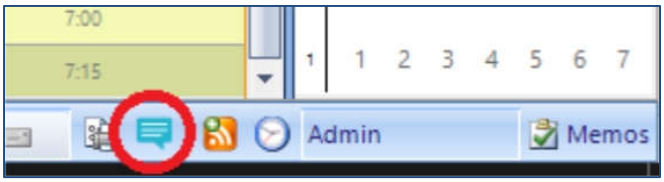
1. Desktop Notification on the 'SMS-PC'. These notifications will show immediately as texts are received, and only show on the 'SMS-PC'. An example is pictured below.



These notifications can be disabled by clicking on **Configuration | Tracker Options | TrackerNet** .

There you can unclick '**Show Notification Popups**'.

2. Whether notifications are on or not, you will also have an icon at the bottom right of Tracker indicating when a new message arrives. This will be accessible from all computers:



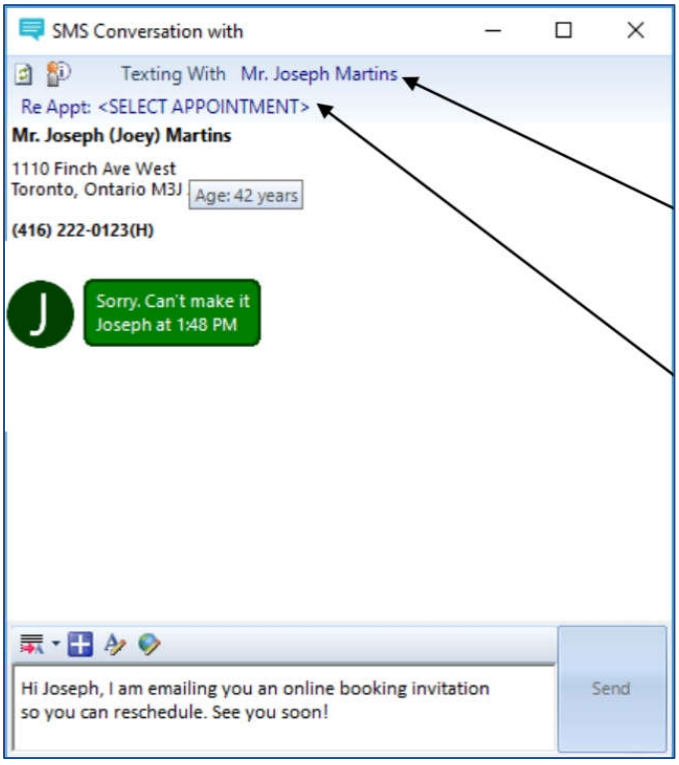
Double-clicking on this icon will open the '**Recent SMS Messages'** Grid report. This report will allow you to see all incoming messages for the selected date range to make sure you don't miss anything. It can also be accessed by clicking **Schedule | Recent SMS Messages.**

(cont'd next page)

Example 1. Incoming Text from Patient Replying to a Text Confirmation. (cont'd)

To respond to a message, simply right-click and then select **'Send SMS'**. The SMS Conversation opens:

When in the Conversation window, Tracker checks for incoming text messages every 5 seconds, so you can have a live chat with the patient.



A phrase control is included for quick responses. All text messages both ways are logged to the patient's correspondence.

If multiple family members share the same SMS number, you can tell Tracker who you are texting with by clicking on the patient name and selecting from contacts that are linked to that SMS number.

If you link the conversation to an appointment, you will also see the details in the appointment message screen.

Example 2. Office Initiates Text Conversation

If you need to initiate a text with a patient, that can be done by opening up their contact info in Tracker and clicking on the SMS icon next to their mobile number.

It's really that easy ….

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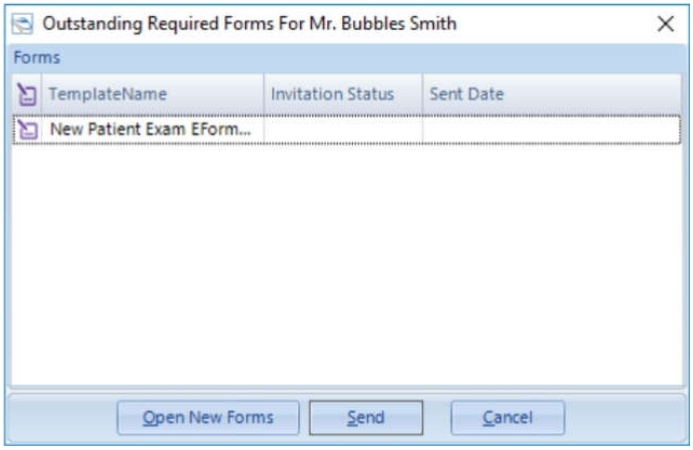
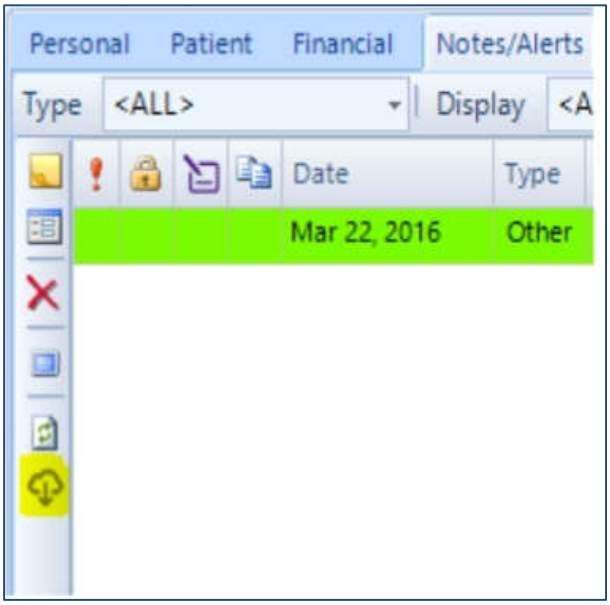
Eforms – Patients Can Sign Completed Form on Tablet

When patients complete their forms at home, they can now use the tablet in the office to verify their information and complete the signature. Here is how:



- When a patient checks-in, you will get a 'Required Forms' notification of any forms that have either not been completed or signed.
- Click 'Send'
- Open the Patient Form Search like you would for a patient who has not filled out their form.
- Load the form and provide the tablet to the patient.
- The patient can then review their form, sign it – and submit it.
- To ensure that the signed form is loaded into Tracker, -- read 'Eforms – Ability to quickly check for completed forms' in the next section.

Eforms – Ability to Quickly Check for Completed Forms



Tracker automatically checks for newly submitted forms every 5 minutes. If a patient submitted an electronic form in the reception area, Tracker may not have had the opportunity to download that form when you are looking for it. The **Notes** screen now has a button to download outstanding forms (pictured left).

This can also be done from the main Tracker Window. Simply Click on **Schedule | Check for Web Forms.** Any forms submitted in the last 5 minutes by any patient will then be downloaded and a desktop notification will let you know whose forms were downloaded.

Tracker 11.27 Enhancements Highlights

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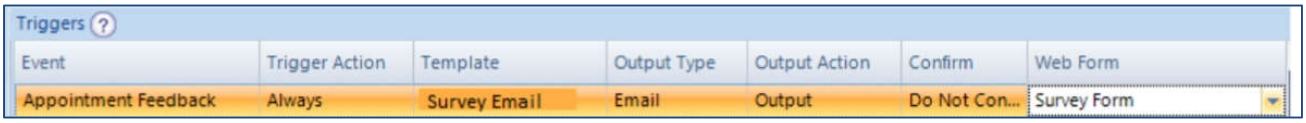
Eforms – Ability to Trigger Automatic Sending of Form

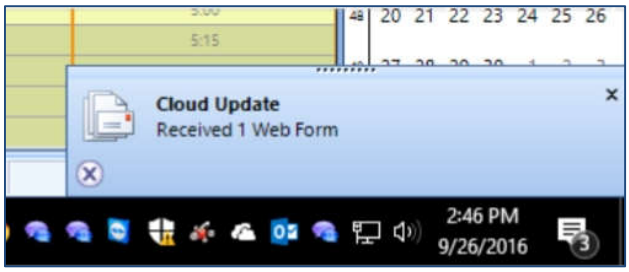
Tracker Options | Documents.
Triggers now allow you to specify a web form to be emailed based on events. For example, if you have a web form called 'Survey Form', you can send out an automatic Patient Survey Email with a link to that letter -- after every appointment. The Trigger configuration for that situation is shown below:



*Note: Like any Eform invitation, the Survey Email TWord template will need to have the 'Web Forms Link' field in it in order to produce the link (pictured below).

Eforms – Notification When New Completed Forms Arrive

When a form is completed and submitted by a patient, the designated Internet computers (the computers that checks for confirmations and forms) will display a desktop notification to alert you:



Eforms – Show and Hide Fields Based on Context

A form can be completed in 3 different contexts:

1. By the staff in Tracker
2. An Eform being filled out by the patient at home.
3. An Eform being filled out by the patient in the office.

In the Form Designer, each question has a new parameter called 'PublishOnlineLocation' wth the following options:

- Online: Shows in All Three Contexts
- Omit Online: Shows Only in Context A
- In Office Only: Shows Only in Context A and C

This can be used, for example, to control where patients can and cannot sign a form.

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Helping You Get the Most Out of Tracker

REPORTING

Metrics

Tracker's Metrics represents a new wave of reporting to provide you the timely business intelligence you need to make decisions. Key Performance Indicators are visualized and compared, allowing you to spot trends –good, bad and otherwise.

Accounts Receivable. Option to Exclude Patients with Credit Balances

A checkbox labeled 'Hide Patients with Credit Balances' is now available on the AR Criteria screen.

Report Security by Practice

Users can now be edited to be given rights to run reports for all practices or only selected practices. This is accessed in the user setup screen (**Configuration | Users**)

Misc. Report Updates

Hygiene Retention in End Of Day Summary now Counts Unbooked/Pended Appointments
Patient Follow Up Report. Optional Columns for all Phone Numbers
Contact and Patient List - Optional Column for Preferred Name and Preferred Contact Method
Patient Call Summary New Optional Column: Appointment Created Date.
Appointment Manager. New Optional Column: 2nd Provider (Hygienist)
Patient Summary Includes Chart # and Consulting Dr. Phone Number
Statement Upcoming Booked Appointments Now Displays Day of Week
Referred By Report - Ability to Filter Patients Based on Appointment Reason
Referral Reports New Optional Columns: Categories and Referring Dentist Occupation
Receipts Report Allows for No Grouping of Practices - Payments of all Practices Show on 1 Report.
Patient Call Summary - New Optional Column for Appointment Created Date/Time
Statement - Refunds updated to show as negative Credit Instead of a Charge
End of Day Summary allows for Selection of Individual Providers
Treatment Plan Report – Optional Column Modified Date

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Admin

Cancelled Appointments show in View All Appointments:

Cancelled = Red, **Short Cancel/No Show** = Bold red.

New Trigger: First Time Referral Source

Unique Logo for Each Practice

Ability to Email 'Selected Codes Only' when emailing Treatment Plan

Checkout Checklist - New Prompt to Book Appointments for New Treatment Plans

If you enable the **Checkout Checklist**, the option 'Book Treatment Plan' will prompt users to make sure that any treatment plans created today has an appointment associated with them, preventing any plans from falling through the cracks.

Fee Guide Changes when Changing Responsible Provider

When the Responsible Provider on an invoice is changed, the fee guide for the invoice will be updated to reflect the default fee guide for the newly chosen 'responsible'. This is useful in an office where there are different specialists so that you don't forget to update the fee guide accordingly.

Ability to See User Who Entered and/or Modified Insurance Plan Information

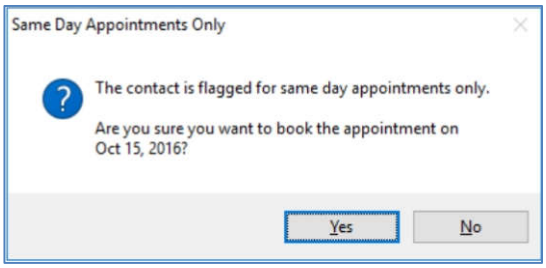
The Insurance Plan Details screen indicates the user, computer, date and time to show who added and who last modified an insurance policy.

Ability to Scan Lab Scripts and Receipts

The Lab Case window now includes a **Documents** section where documents for the lab can be attached or scanned.

'Book Same Day Only' Flag for Unreliable Patients

In the Patient tab, there is a new checkbox labelled 'Book Same Day Only'. Enabling this flag will warn the user if they attempt to book that patient for an appointment on a future date.



Ability to Set Patient Default Provider to One Provider

In **General Options**, under **'Contact Defaults'** there is now an option for Provider. Setting it to <BASED ON CONTEXT> will not change the way providers are set (based on the schedule column selected). However, if you select a provider from this list, it will then default the provider for all new patients to the selected provider.

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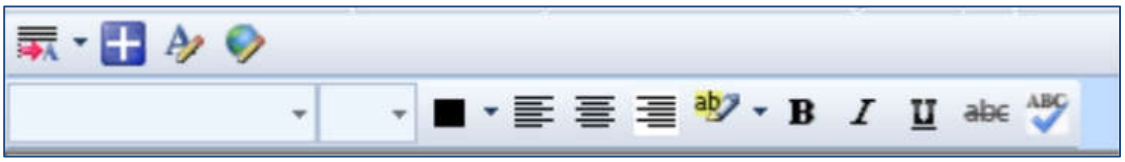
Clinical

New Charting Existing Condition –Suspected Decay

The restoration wizard will prompt to complete these.

Notes Toolbar Improvements – Easy Access to Spell Check

The notes toolbar now provides easy access to formatting and spell-check buttons:

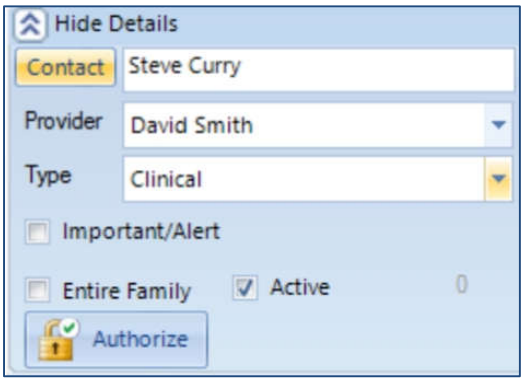


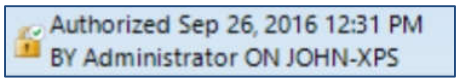
Required Forms Ability to Set for any Appointment Reason

In the Past, required forms configuration was linked to a specific appointment reason. Now, with the <Any Reason> option, a form can set to be required without being linked to a specific appointment reason. For example, if you have a Medical History form that you require to be completed at each appointment, just set the reason to <Any Reason> and the Trigger Type to <Any Appointment>.

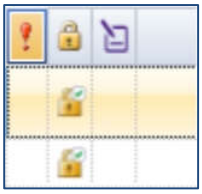
Authorizing Notes & Forms

When a note is completed, you can now mark it as 'Authorized'. This has the effect of locking the note prior to the 24 hour period as well as providing an indicator that the note is complete. Once Authorized, the Authorize button is replaced by text indicating who/when/where authorized the note.





When reviewing notes as part of day end procedures, the grid will show you which notes are authorized. This streamlines your day end as you know that you do not have to review those notes.



Ability to Extract or Show as Missing Multiple Teeth in Charting

For example, if you are removing or extracting multiple teeth, you can save time by:

- Click on the tooth selector (arrow) icon in the conditions
- Drag to select multiple teeth OR hold down CTRL and select individual teeth
- Right Click. Then Select your condition (such as Extract)
- You will then be prompted to confirm details for each tooth

Teeth with Outstanding Treatment Plans will Show a Treatment Plan Icon

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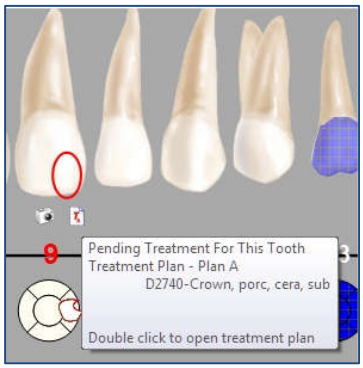


Forms Security. Restrict the Reading of Patient Forms To Approved Users Only

For example, if you're using forms for patient reviews, you may want to restrict who can and cannot read the forms. Here is how you can secure them.

Step 1 Configure the form for Security

- Click on Configuration | Form Templates
- Select the Form, then click 'Edit'
- Put a checkmark in the box labelled 'Restrict Viewing of Answers'
- Click OK.

Step 2 Configure Users

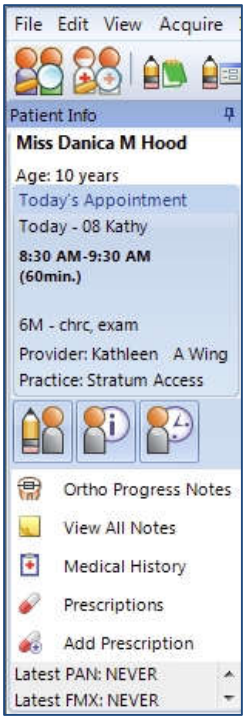
- Log onto Tracker as admin.
- Click on Configuration | Users.
- Select a User
- For a user to be able to view a restricted form, you will need to give them the right to 'Run Management Reports'
- To restrict users from reading these forms, ensure they do not have the right to run management reports

Mount Templates Order Now Sortable

In Mounts, right click and then select 'Edit Templates'. The up and down arrows on the right will allow you to sort your mount templates.

Clinical Sidebar Shows Patient's Age

Example →



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TWord

Ability to Access TWord Document Queue from within Clinical

The TWord button in clinical has a dropdown to be able to access the Document Queue as well as the ability to edit templates.

Document Trigger for First Time Referral

When you are referred a new patient for the first time by a new referring source, this new trigger will allow you to be notified of this event and send out a letter or email specifically for this occasion. This is the **'Documents'** tab of Tracker Options under the event **'First Time Referral Source'**.

Mark Documents in Document Queue as Reviewed

When the Dentist has finished editing a document, it can be marked as 'reviewed' so that admin can go ahead and forward the document to the patient or referring dentist.

Additional New Features

Added Ability to Handle Non-Duplicating Insurance Carriers
Add Security to Choose Who Can Open / Read Completed Form
Optional Column for Appointment Created Date to Patient Call Summary
Notification when New Eform, Text or Appointment Booking Comes In
Add Ability to Select All Appointment Reasons when Configuring Required Forms
Show User Info on Payment Screen
Ability to Open a Submitted Form by Double Clicking on the Form in the Web Form Manager
Add Day of Week to Upcoming Booked Appointments
Referring Doctor and Consulting Doctor Phone Number on Patient Summary
'Find Missing Entries' in Insurance Payments now lists Patient Names

Additional Changes

Show 'Total Amount Billed' in the Statement Summary Section
Schick33 Default Image Alterations
Plan Max/Used and B/M/P Max/Used Now Included on Patient Summary
Provider Revenue Report Summary to Show Totals
Root Canal Claims and Estimates Rejected Because of Surface
View Documents from Odontogram in Perio
Selecting Providers from TX planning / List Now Utilizes Defined Order
Ability to Choose Between Combined Max and Plan Max on Treatment Maximizer
Close all MCA Error Notifications with a Single Click
Hover Now Works on Watch Annotations
Inactive Notes No Longer Displayed from Patient Summary
Option to Show Flow State as Color in Place of Alert Color
Statement 'Out of Memory' Issue Resolved
Quick Info Displays Patient Has Appt Today if They Have any Appt today - Regardless of Status
Appt Time Now Shows on Patient Summary