Tracker Today

What Do I Need To Do Today?

1.) Arrive on Time
2.) Take a Breath Before Diving In…
3.) Start the Day Fresh
4.) Run '**Tracker Today**'

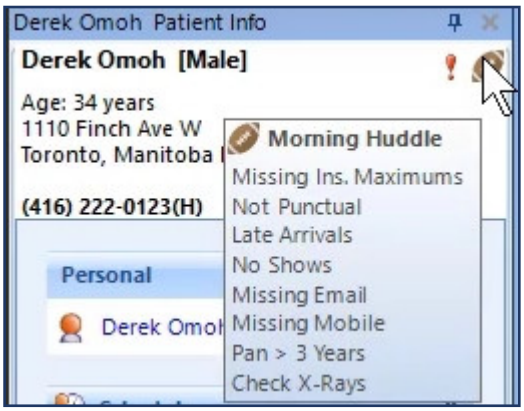
In an effort to organize everyone in the office, Tracker Today can be configured for individual user-login – and/or the appropriate office-location, if applicable.

There are two ways to launch Tracker Today:

1) **Reports** > **Tracker Today**
2) **Tracker Today** icon in Tracker System Tray

To get **Tracker Today** configured for you and your team, you'll need a little bit of 'setup' to get you going. Setting up your criteria for days-ahead, user-specific reporting and office (for **Tracker** multi-office users). You can also set up **Tracker Today** to launch automatically when you log in! **Tracker Today** will run in background all day for you, simply '**Refresh**' for up-to-date information.

Tracker Today creates a structured outline for areas important to you. It creates a 'Click-and-Go' environment to follow-through on appointments, billings, insurance, treatment planning, etc.



Morning Huddle

What's with the 'Football' ?

A simple 'mouse over' of the new '**Morning Huddle**' football will give you an on-screen grouping of pertinent patient information. This feature is designed to accentuate the 7 a.m. team meeting where everyone in the office formulates a plan of action for the day. The **Morning Huddle** utilizes **Tracker**'s built-in technology to organize information that you've decided is important, so you have more time following up.

In the old days, it was common to organize '**Patient Care Forms/Summaries**' using a highlighter to notate important areas that might require attention. What if you had access to that functionality – without paper and a highlighter???

To get Morning Huddle optimized, click: **Reports** > **Morning Huddle**

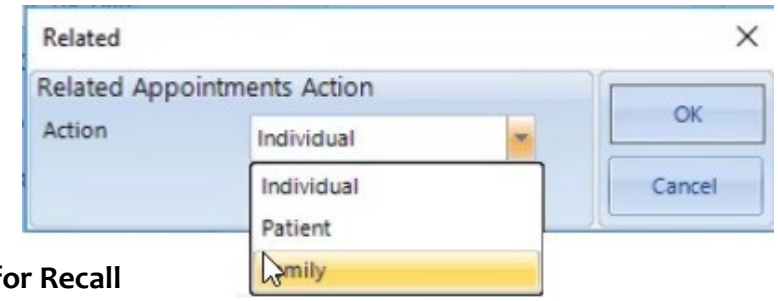
One quick look at the **Morning Huddle Summary** will guide you along in the same environment-style you experienced within **Tracker Today**. You can choose appropriate **Options,** allowing you to customize Tracker to alert you regarding balances, x-rays, missing patient information, unscheduled treatment, etc. You can also identify area where you get reminded, e.g. at **Patient Check-In**, **Check-Out** and/or **Patient Info**.

A huge benefit of making the huddle-info electronic? You can review all of your important office-criteria for any day you choose. Most common, would be checking out what tomorrow might look like!! Ready, Set –

Tracker e-Services – New Features

Family Confirmations

A single confirmation can be sent out for patients with multiple appointments, as well as families with multiple appointments on the same day! This enhancement can be configured within **Tracker Options > TrackerNet** and requires administrator credentials.



Automatic Reminders for Recall

Email or SMS patients on your **Appointment Manager** requesting they follow up to book their upcoming Recall Appointments. No more time-consuming phone calls with voice mails that lead to nowhere!

Set up your preferences here: **Tracker Options > TrackerNet > Pending Reminders > Action**

Fill Short Notice Cancellations via Text (SMS)
Short-Notice cancellations are unavoidable (real-life happens), as well as costly. Filling these openings before your doctor has a melt-down can be stressful -- and time consuming. **Tracker e-Services** has been enhanced, allowing you to use the **Short Notice Overdue Recall List** to fill those openings – easier than ever before.

Dormant Patient Reactivation
If you've ever let your dormant patient list slide a little, it can be a burdensome challenge to face. With Tracker v11.28, we've added another feature that can take the pain away. **Tracker e-Services** can now contact each and every one of those people via email and let them know you have an appointment waiting for them.

Happy Birthday Greeting via Text (SMS)
Previously limited to email, with Tracker v11.28 – you can utilize Text/SMS to forward a birthday greeting to your office contacts (patients/professionals/vendors).

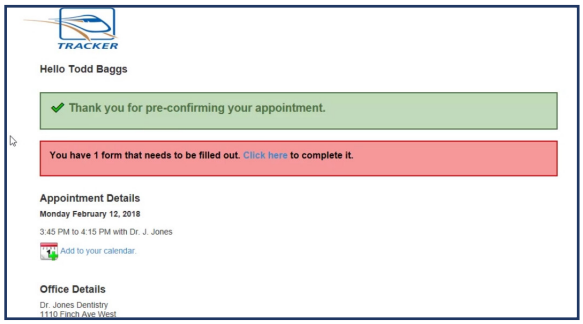
Bulk Text (SMS) Merge
Previously limited to Email, **TWord Bulk Merges** can now be sent via SMS. For example, if you decide to implement a whitening promotion, you can now bulk-test ALL your patients the good news.

Treatment Plan / Pre-Treatment Estimate Automated Email Follow-Up
Tracker e-Services can now be utilized to automatically email a reminder to patients who are waiting on a pre-estimate. We've heard stories of insurance carriers sending approvals directly to patients, bypassing the office completely. We also know that sometimes following-up on approved TxPlans can get overlooked or passed-by completely?

Common practice would be to set up an email reminder, perhaps 30 days after the estimate is sent to insurance.

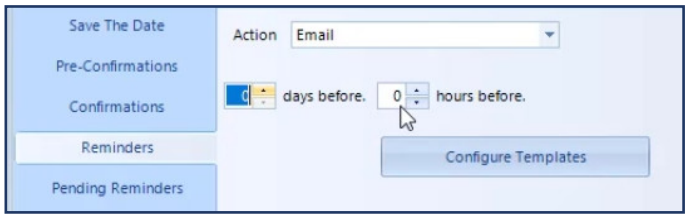
Tracker e-Services - Improvements

Link to Outstanding Forms on Confirmation Page
When a patient confirms an appointment, their confirmation notice will include notification of any outstanding forms (Medical History, Consent, New Patient etc.) they need completed, as shown:



Appointment Template Configuration
Appointment Templates can now be linked to appointment reasons. For example, you might have one template for recall appts asking the patient to bring a current list of their current medications.
Tracker Options > TrackerNet > Configure Templates

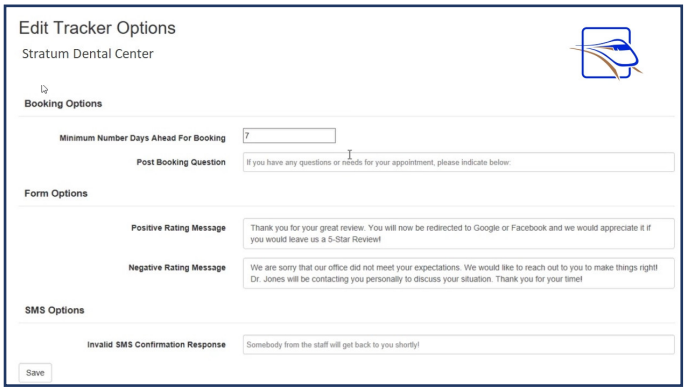
Same Day Reminders
Reminders can now be set to go out the morning of the appointment
Tracker Options > TrackerNet > Reminders



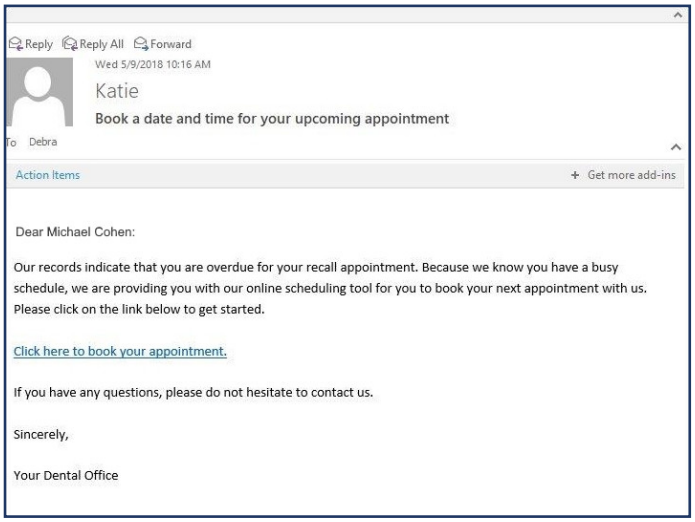
'Use Business Days' Option
With this option, the 'Days Ahead' setting for automated confirmations will not consider any days the office is closed. **Tracker Options > TrackerNet > Business Days**

Customized Message for Online Booking
Online Booking – Message to Patient Post-Booking
5 Star Review. Customize Positive/Negative Response
Invalid SMS Confirmation Response / Customize Text

A whole host of options to put you in control of how you communicate with your patients



Online Booking Via Email / Text
Invitations can now be sent via Email and SMS Text for patients to book appointments online.
Tracker Options > TrackerNet > Booking



Set Form Expiration Option for In-Office Forms
Allows the office to send all forms for the day to the tablet without worrying about them expiring when the patient arrives.
Tracker Options > TrackerNet

Reporting and Management Tools

Reports with Subtotals for Dentists, Hygienists and Specialists
Production reports such as the Daily and Monthly Summary of Fees and Payments will now subtotal based on Dentist, Hygienist and Specialist so you can understand better where your practice's revenue is generated. Here is how Tracker identifies each type:

- A Dentist is a provider who is their own Responsible provider **Configuration | Providers** Dentists are Indicated in the report as 'Responsible'
- A Specialist is a provider who is their own Responsible Provider and who has the 'Specialist' checkbox enabled in **Configuration | Providers**
- A Hygienist is a provider whose Responsible is set to a Dentist or Specialist as defined above. Hygienists are indicated in the report as 'Non-Responsible'

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Fees and Payments Summary (By Day)

Stratum Dental Center

01-Sep-17

Trans.Date	Fee Amount	Lab	In House	Expense	Refund	Interest	Adjust.	Cash	Patient Ch.	Credit Card	Debit Card	Ins. Payment	Other	NSF Ch.	Payment Total
Specialist	$4,021.00	$0.00	$0.00	$2,861.00	$0.00	$0.00	$0.00	$0.00	$427.41	$625.00	$0.00	$33.00	$0.00	$0.00	$1,085.41
Responsible	$1,336.40	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$280.00	$193.00	$815.40	$0.00	$0.00	$0.00	$1,288.40
Non Responsible	$5,634.00	$0.00	$0.00	$2,861.00	$0.00	$0.00	$0.00	$0.00	$427.41	$1,062.80	$334.50	$189.00	$0.00	$0.00	$2,013.71
Practice Totals	$6,970.40	$0.00	$0.00	$2,861.00	$0.00	$0.00	$0.00	$0.00	$707.41	$1,255.80	$1,149.90	$189.00	$0.00	$0.00	$3,302.11

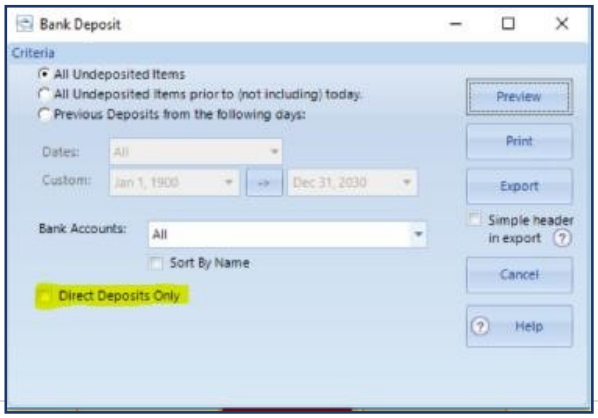
Detailed Billing by Procedure – Shows Code Usage by Percent as well as Count
Previously this report provided the percent% usage of a code relative to all codes for the period and has been expanded to show a count of how many times that code was billed during the period.

Treatment Plan List – New Optional Column: Created by User
Allows staff to review their own treatment plans and for management to report on who is creating which treatment plans.

Dormant Patients by Last Appointment
This report provides a list of patients who have no booked appointments after a certain date.

Deposit Report has Filter for 'Direct Deposit Only'

As shown:



Insurance Payment Report Now Includes "Treatment Date'

Receipts Report Shows Count of each Payment Type

Adjustment Summary Report Reports > Payments
This new report details every adjustment reason (as typed into the 'comments' textbox in the adjustment screen), indicating the amount of all adjustments with that given reason. For example, if three adjustments are done for the reason 'Failed Restoration' for $100, $150, and $150, the report will show 'Failed Restoration' for $400. This featured report will also help you track adjustment types and how they calculate as a percentage of total adjustments.

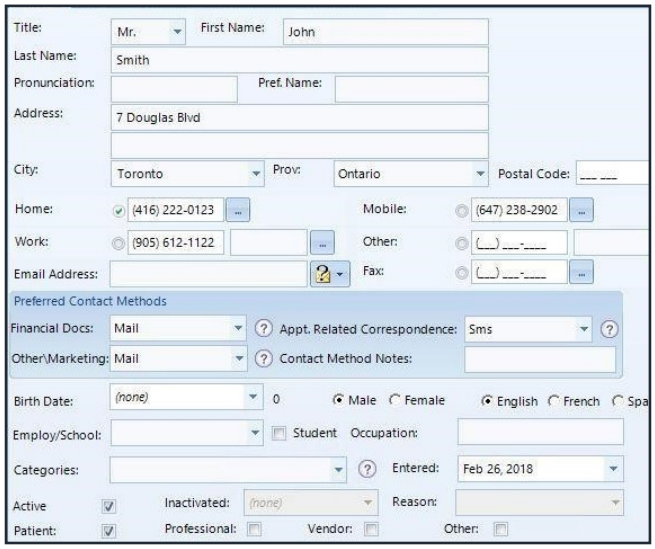
Adjustment Summary Report by Carrier

Audit Report - Patient Information

Reports > Management > Audit Report

Changes made to a Patients First and Last Name, Phone number and Address are now audited.

For the patient John Smith, we change the Last name, Address and Phone Number.



The audit report now reflects these changes:

Time	User	Computer	Object	Topic	New Value	Detail	Original Date	Name	Action	Object Id
Feb 26, 2018 2...	TBNAdmin	CONVERSION-PC	Contact	Personal Info		Address1 - Old: New:7 Douglas Blvd	Feb 26, 2018 2...	Smiths, Mr. John	Update	10497
Feb 26, 2018 2...	TBNAdmin	CONVERSION-PC	Contact	Personal Info		Address1 - Old: New:7 Douglas Blvd	Feb 26, 2018 2...	Smiths, Mr. John	Update	10497
Feb 26, 2018 2...	TBNAdmin	CONVERSION-PC	Contact	Provider	6		Feb 26, 2018 2...	Smiths, Mr. John	Update	10497
Feb 26, 2018 2...	TBNAdmin	CONVERSION-PC	Contact	Personal Info		LastName - Old:Smith New:Smiths	Feb 26, 2018 2...	Smiths, Mr. John	Update	10497
Feb 26, 2018 2...	TBNAdmin	CONVERSION-PC	Contact	Provider	1		Feb 26, 2018 2...	Smiths, Mr. John	Update	10497
Feb 26, 2018 2...	TBNAdmin	CONVERSION-PC	Contact	Personal Info		Address1 - Old:7 Douglas Blvd New:7 Douglas Street	Feb 26, 2018 2...	Smiths, Mr. John	Update	10497
Feb 26, 2018 2...	TBNAdmin	CONVERSION-PC	Contact	Personal Info		PhoneNumber - Old:(416) 222-0123 New:(416) 222-0125	Feb 26, 2018 2...	Smiths, Mr. John	Update	10497

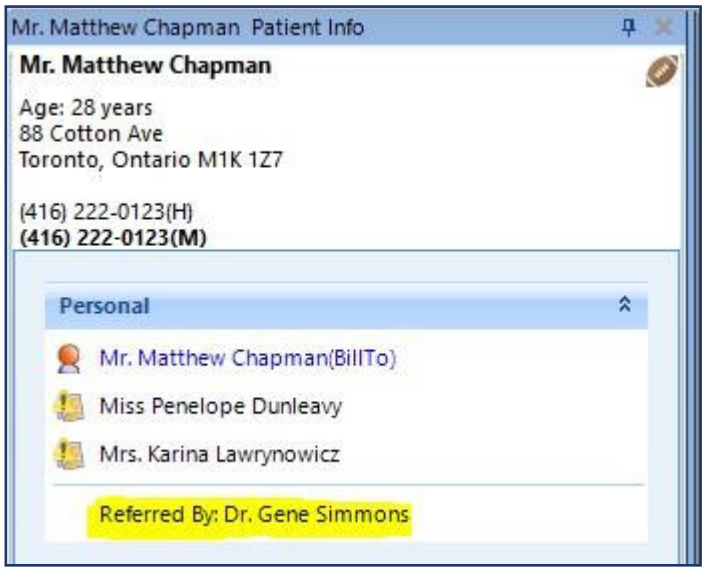
Audit Report – Login Info
Tracker will now audit all logins. Successful and attempted-but-unsuccessful logins are now included in the **Audit Report**. The example below shows audits of the user "Ken" and "Admin" making both failed and correct logins.

Feb 26, 2018 2...	Admin	FRONTDESKONE	User	Login	Admin	Success
Feb 26, 2018 2...	Admin	FRONTDESKONE	User	Login	Admin	Success
Feb 26, 2018 2...		CONFERENCEROOM	User	Login	Ken	InvalidUserIdPassword
Feb 26, 2018 2...		CONFERENCEROOM	User	Login	Ken	InvalidUserIdPassword
Feb 26, 2018 2...		CONFERENCEROOM	User	Login	Admin	InvalidUserIdPassword
Feb 26, 2018 2...	Ken	FRONTDESKONE	User	Login	Ken	Success
Feb 26, 2018 2...	Admin	FRONTDESKONE	User	Login	Admin	Success

Administration

Birthdate on Patient Search Screen
By popular demand -- you can now search by birthdate. In fact, all patient-searches now show **Date of Birth** and **Patient Age** in the search results.

Referral Source Lookup
The **Patient's Referring Dentist** now shows on the patient sidebar. Clicking on the name of the referring dentist opens their contact information screen.



On the right-hand side is the '**Referred By Report**' button:

Clicking on this button will open **the Referred By Report** for the referring dentist. There you can make pertinent changes and/or review all patients ever referred by that Referral source!

Appointment & Treatment Plan Status Linking
If you have a pending appointment linked to a treatment plan, **Tracker** will prompt you to open the linked treatment plan when you book the appointment. This allows the user to update the status of the treatment plan for example, from **'Recommended'** to **'Patient Approved'**.

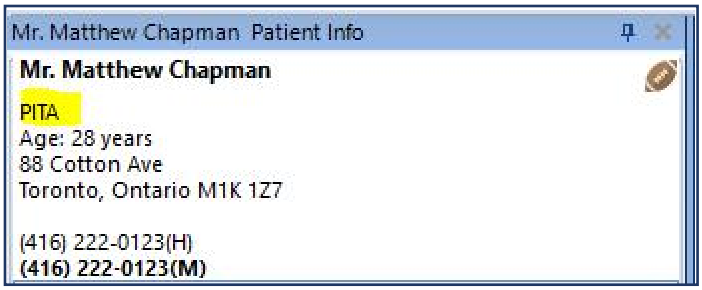
Basic & Major Combined Max
Insurance Plan Coverage Details now includes a new maximum for Basic & Major combined Maximum. Combined Maximum does not include preventative coverages.

Auto Update Insurance Status when Insurance Payment is Entered
When an insurance payment is entered onto an invoice, the **Insurance Status** (found in the **'Insurance Info'** tab of the invoice) will be updated to **'Payment Received'**). The **Insurance Submissions Report** will be able to utilize this information to exclude invoices where payment has been received.

Option to Show Category in Patient Sidebar
To enable this new option, click on **Configuration | Tracker Options**, then click on **'Quick Info'**.

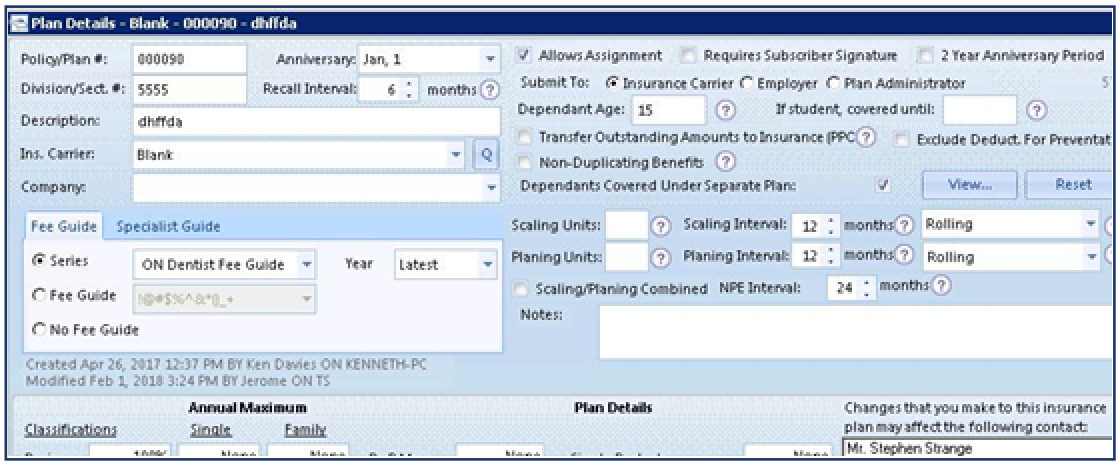
Locate the **'Side Bar (Patient Info)'** section at the top right.

Enable the **'Display Contact Categories'** checkbox.
Once enabled, the patient categories will display on the sidebar.



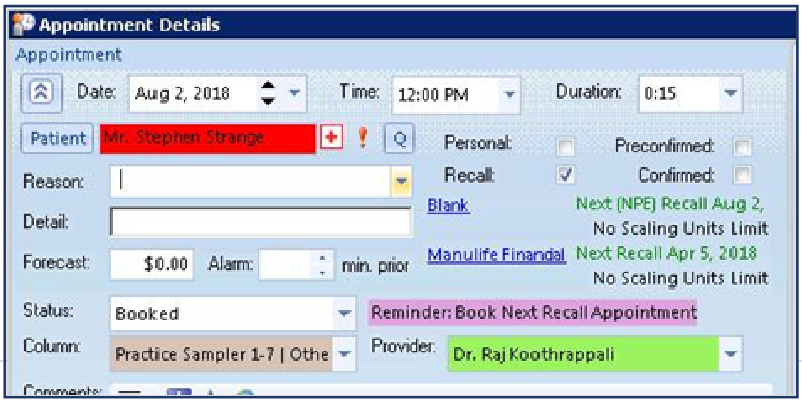
Complete Exam Insurance Coverage Eligibility on Appointment Window

You can now see when a patient is eligible to have a complete exam covered by insurance if the information is entered into the plan details.



Plan allows Complete Exam (**NPE Interval**) every 24 months.

When entering the next recall appointment Tracker will put **Next(NPE)** to let you know you can bill a Complete Exam (as shown).



Bulk / Family Pending Appointment Handling

You can now select multiple appointments and alter the follow-up date. You can also easily add notes to all the appointments.

This functionality is available in the **Appointment Manager**, as well as the **'View All Appointments'** window.

Simply highlight the appointments (by holding the 'Ctrl' key on your keyboard while selecting the appointments with your mouse) and then click on **'Advance Follow Up Date'** button on the right side.

All appointments selected will be advanced to the date shown and have the comment entered to all of the appointments.

Holidays for Individual Providers

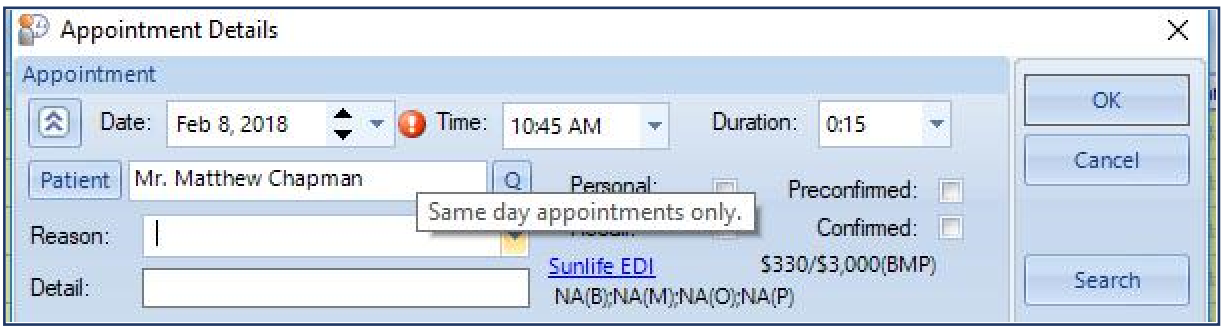
Previously, holidays were used to close the entire office. Now holidays can be used to book individual providers off -- for specific times. Using this feature ensures that dates cannot be accidentally opened for those providers through **'Office Hours'**.

Ability to Assign Memos to Multiple Users

When creating a memo, the **'Additional Copies'** button allows you to specify any number of users to include. Each user will get their own memo that they can complete on their own. If one user completes the memo, other users' memos remain active until they complete their Memo.

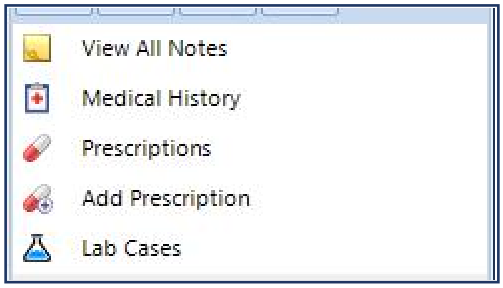
'Book Same Day Only' flag appears Immediately when Creating Appointment

Patients flagged as **'Book Same Day Only'** will show an **'!'** icon next to the date as soon as the appointment window is opened.

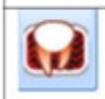


Clinical

Lab Case Indicators in Clinical Sidebar



New Conditions

	**Space Maintainer**
	**Lingual Wire**
	**Structurally Weak Tooth** Marking a crown as structurally weak will result in the Treatment Plan Wizard recommending a Crown for the tooth

Search Codes by Description in Charting

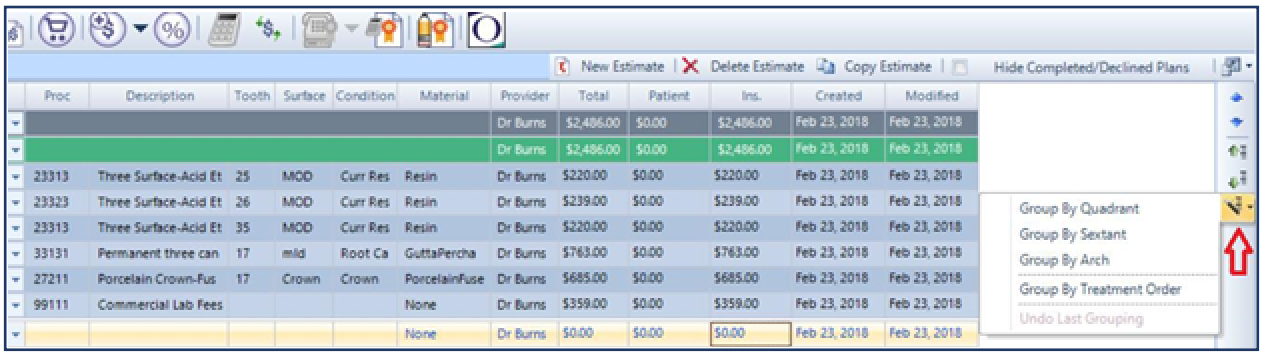
Ability to Navigate Images Sequentially in Tracker Image Editor
Using the left and right arrow keys on the keyboard will allow you to navigate through images in the **'Image Editor'**.

Differentiate Between Questions & Answers
When viewing form data, questions and answers are now differentiated by bold vs. non-bold font, as pictured:

Indicate which of the following you have: Hepatitis C~Heart Palpitations
Are you a Smoker?: Yes

Treatment Plan Wizard Auto Sequencing
Tracker can now make **Phases** in **Treatment Plans** with a simple click of the **'Sequencing'** button on the right of the Treatment Plan screen.

You can make phases for each **Quadrant, Sextant,** or **Arch.** You can also group by **Treatment Order** which will sort based on treatment type.

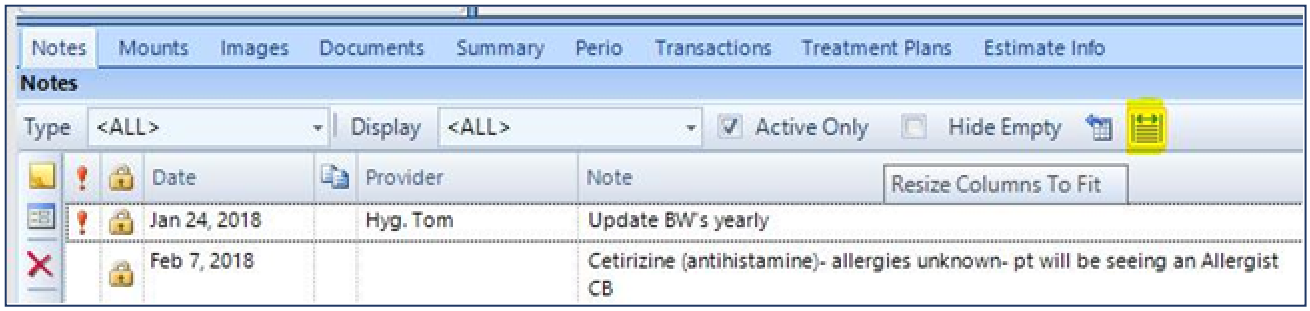


Treatment Plan example sequenced by **Quadrant:**

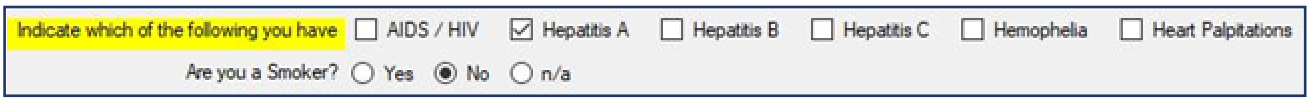
	Status	Ins. Apprvl	Appointment	Proc	Description	Tooth	Surface
Total Plan A	Recommended	None	<NONE>				
Phase Q1	Recommended	None	<NONE>				
	Recommended	None	<NONE>	33131	Permanent three can	17	mld
	Recommended	None	<NONE>	27211	Porcelain Crown-Fus	17	Crown
	Recommended	None	<NONE>	99111	Commercial Lab Fees		
			<NONE>				
Phase Q2	Recommended	None	<NONE>				
	Recommended	None	<NONE>	23313	Three Surface-Acid Et	25	MOD
	Recommended	None	<NONE>	23323	Three Surface-Acid Et	26	MOD
			<NONE>				
Phase Q3	Recommended	None	<NONE>				
	Recommended	None	<NONE>	23313	Three Surface-Acid Et	35	MOD
			<NONE>				

AutoSize Button For Notes

When viewing notes (**Tracker Clinical**), sometimes long notes/forms result in a horizontal scroll bar. The **'Resize Columns To Fit'** button quickly organizes the notes column for optimized viewing.



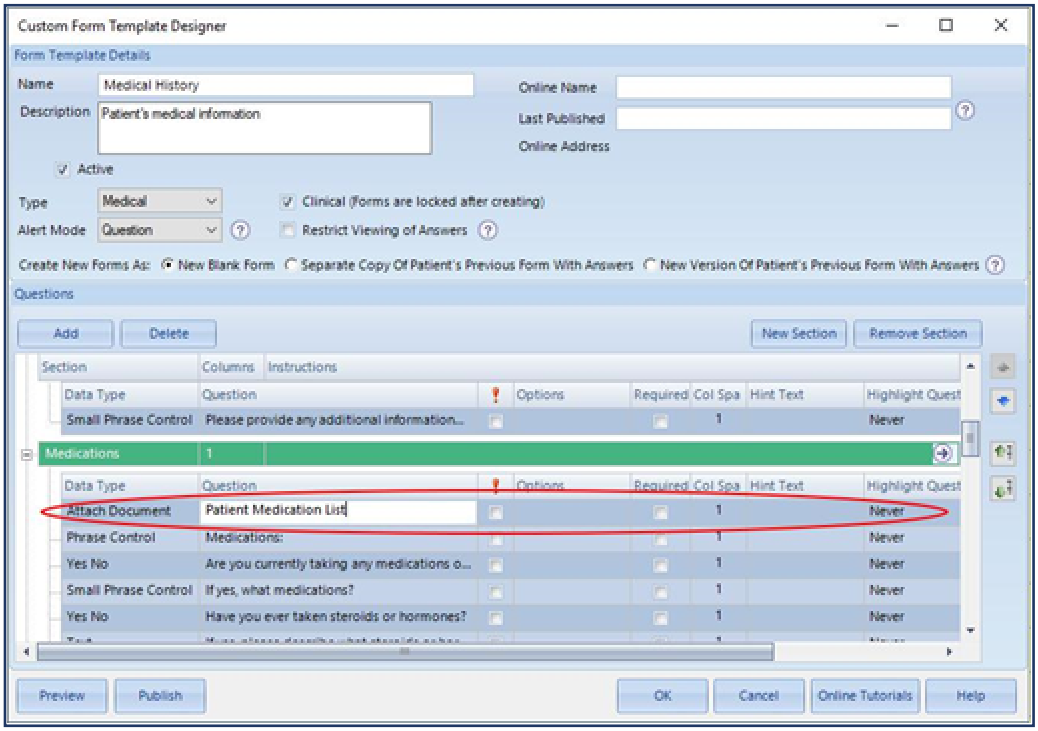
Ability to Highlight or Alert Questions in Tracker that are Marked Yes in e-Forms
Consider a form with many medical conditions. The vast majority are marked **'No'**, but you want to highlight the **'Yes'** answers to better-identify conditions. We've updated the **Tracker Form Designer** to include a **'Highlight Question'** property with options of **Never**, **Always**, and **Has Answer**. If set to **'Has Answer'** then a condition with a **Yes/No** question type will be highlighted when answered **'Yes'**. Note: A checkbox group question will be highlighted if any of the checkboxes are selected.



Attach File to Medical History
You can now attach / scan documents into forms. An example of this can be offices looking to scan in a list of medication or allergies provided by the patient. Unlike the **'Image'** data type, this is ***not*** a static document that will exist on every form and will be different per form, per patient.

To use this feature, you will need to add a new question to your form with the data type **Attach Document**. This can be accomplished using the following steps:

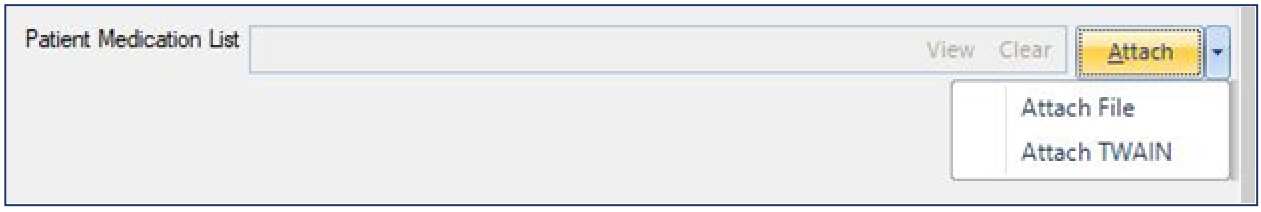
1) Edit your form by going to **Configuration | Form Templates** from your main **Tracker** window
2) Create a **'New'** form or select an existing form and choose **'Edit'**
3) On the section below, highlight the section in which you want to add the question and choose the **'Add'** button
4) On the newly added line, change the data type to **'Attach Document'**. In the question column, you can add a description for the document, if desired.



If your office uses e-Forms, you can select the PublishOnlineLocation to restrict this field from showing online if desired.

Attaching the Document

When using your newly edited form, you can now click on the **'Attach'** button to browse and add an existing file to the form -- or click the dropdown arrow using e **'Attach TWAIN'** -- to open your scanner interface and attach a brand-new document, as shown:



This document is also available to be viewed in the patient **'Correspondence'** tab.

The TWAIN function will require the office to use a TWAIN compatible scanner.

TWord

Insert Question from Form into TWord Document

Take the following example: You want to create a new periodontal exam template and there are some conditions or questions that do not always apply. With this new feature, the letter can be designed so that the **question** and the **answer** come from the form template. If the question is unanswered, then the question will simply not show up on the letter. If the question is answered, then the letter will generate the question and the answer -- from the new form.

TWord Document Output Can Now be Changed in Document Queue
In the past, this was selected prior to queuing and could not be altered. With 11.28, you can change from **Email** to **Printer** (or vice-versa) within the document queue. Simply select the document, then click **'Edit Queue Item'** to change the document output.

Ability to Edit and Send to the Queue
Previously, editing and queuing a document was a 2-step process. With the added **'Queue and Edit Output'** action, you can review the document and make your edits/changes. Upon saving the document, it is sent to the **Document Queue**.

TWord Document Queue Shows Which User Created the Document

New Contact Field in TWord: Category