

Clinic Essentials Update Notes 2009

Dec, 23 2009 (7.10.26)

- Widen practitioner name on Visit Statement
- Correctly add rescheduled appointments to scheduler refresh
- Stamp Created date/time on appointment when appointments are created with the Treatment Plan
- Correctly display Active status on Patient report without requiring an email address

Nov, 25 2009 (7.10.25)

- Correct Patient Mailing List report to include all patients that have seen the selected Practitioner in the date range
- Remove menu item Reports, Practitioner since all of these reports have been replaced
- Correct Patient Marital Status to Save Separated, Common Law and Other
- Add Last X-Ray date to Schedule screen, patient area if it is filled in
- Correct Marketing Report Mail Merge skipping Patients with Default Bill To set to 3rd Party
- Refresh F-Key tooltip without having to close the Reception screen

Nov, 19 2009 (7.10.24) (7.10.23 internal only)

- Improve Label note handling so that they are still stored even if Saved to an Order first, avoid saving notes where no labels were printed
- Ensure that patient name does not change when rescheduling a New Patient appointment for a patient that does not exist in the database yet
- Improve speed in Find Appointments window when a New Patient appointment has been selected
- Add Insurance payment transfer between practitioners to the Charges & Receipts Audit by Practitioner and the Daily Charges & Receipts Report
- Correct Patient List Address Label ignoring patients with a blank group
- Correct Next Appointment Time not printing on Receipt when Bill To is not Patient
- Correct new appointment not immediately being displayed in Appointment List view
- Make Calendar Note appear when you rest the mouse on a day
- Add more text to Warning Message when deleting a Fee Code
- Correct A/R button on Reception screen to show A/R for each practitioner
- Change Cancel to Retype on Popup for New Patient Appointment
- Correct A/R display by practitioner from A/R button in Reception
- Correct formulas for setting appointments in Treatment Plan
- Do not allow Practitioner colour to go white in Edit Practitioner, Configuration
- Correct display of A/R credit for another practitioner when entering a payment
- Remove "all practitioner" option when saving a Template in Invoicing screen
- Correct Patient mailing list for Practitioner Report
- Speed up Last Statement date posting when printing A/R Statements
- Remove "No Show" appointments from Patient Appointment calendar
- Correct reports not including patients with a Blank Group
- Lengthen Practitioner name on Visit Statement

Oct, 17 2009 (7.10.22) (7.10.21 internal only)

- cleanup drill down preview on Practitioner Production Report
- change Patient Followup Report to sort by Practitioner then by patient Lastname, Firstname
- add Category List Report
- correct EDI Payment formula to include Debit request on all accounting reports
- correct 3rd Party Other Payments in Charges and Receipts Audit Report
- correct Crystal Reports 10 Installer needing to be run manually in some installations
- correct wrong patient information being displayed after clicking the Clear fields button
- add Patients with Blank Email Address Report
- clarify description on Patient Mailing List Report
- keep current patient in name field after Reschedule
- do not allow refresh to change field with focus
- correct title on Recall Report
- add Clinic Fax number to X-Ray Request Report
- do not allow Practitioners with similar UserIDs to merge schedule templates
- correct Hold Billing screen where chart number is less than 7 characters
- correct Crystal error on Patient Label (QL-550) 62mm Report
- correct Patient Information on scheduler being kept refreshed and in sync with Patient name

- correct Grand Total Percentage on Production Reports
- correct 3rd Party Receipt showing both Patient GST and 3rd Party GST
- correct Practitioner Totals on Patient Collection Report and Unapplied Credits Report
- correct error during Family (member of) Payments
- correct error on Treatment Plan Report
- improve speed on creating MSP submission

Sept, 17 2009 (7.10.20) (7.10.18 and 7.10.19 internal only)

- Correct phone number display when using F12 to get to the scheduler
- Correct wrong default reason being displayed on the scheduler after deleting reason from the patient
- Correct cursor jumping to the reason field after typing a partial name and pressing <enter>
- Correct problem selecting a time slot in the Scheduler while a refresh is happening
- Correct Add Patient screen being displayed in the background
- Correct problem of no next/previous page buttons displayed on Report Preview
- Optimize treatment plan for speed and expected behaviour
- Re-enable default billing template on Edit Practitioner
- Do not show a practitioner on the Schedule on a day where they have no appointments setup and no appointments booked
- Improve Scheduler speed as well as make refresh faster and more consistent

Aug, 24 2009 (7.10.17)

- Add drill down capability to reports (only available when one report is run at a time)
- Position desire time on Scheduler when returning for M, W or Summary of Appointments view with a Right Click on an appointment slot
- Add new MSP Explanatory codes

Aug, 17 2009 (7.10.16)

- Correct occasional problem of failing to pop the patient list when only the last name is typed in
- Correctly centre the scheduler to the current time when refreshing the screen

(7.10.15)

- Stop the validation of the name when clicking Clear Fields

(7.10.14)

- Correct error when manually typing in a Reason on a new appointment
- Correct the lose of an appointment name that was typed at the same time that the Scheduler is refreshing

July, 17 2009 (7.10.13)

- Enhance Report Previewer to display multiple reports in separate tabs

(7.10.12)

- Correct press <enter> on appointment slot to enter a name
- Correct *Note on scheduler taking more than one slot if previous appointment had extra slots
- Enhanced screen display change in Summary of Appointments by Practitioner to support arrow keys and page up/down
- Automatically create Clinic Essentials shortcut if needed during installation
- Correct to locating of the correct appointment phone number when switching from the Recall/Reminder screen
- Make Reason extra time orientation take precedence over practitioner setting
- Refresh total at the bottom of the Inventory Receipts screen after posting
- Correct new patient dialogue not popping if a new patient name is typed in the scheduler at the same time as a screen refresh is occurring

June 24, 2009 (7.10.11)

- Correct CUSER_ID is not found error when billing more than one line
- Correct intermittent appointment screen not getting refreshed new patients or notes
- Correct Ref/Memo getting populated when the appointment name is typed
- Make email field taller in Edit Patient
- Make automatic Recall Report print directly to printer rather than Preview
- Enhance Crystal Report Runtime installer

June 5, 2009 (7.10.10)

- Correct intermittent freeze when clicking Save Order or Label button in Invoicing screen
- Send Recall / Reminder List directly to Printer without previewing first
- Automatically put a shortcut on the desktop for Clinic Essentials during installation

May 22, 2009 (7.10.9)

- Correct Scheduler refresh not happening after clicking Edit/Notes
- Automatically mark patients as Active during Edit Patient if Registration date is blank
- Mailmerge no longer available except for users with security level 9
- Add labels for Brother QL-550 printer. Prescription label, Patient Address label and Patient Chart label
- Refresh Summary of Appointments for Each Practitioner screen when the date is changed
- Correct Registration date and Active getting set by Edit Patient button on Reception screen
- Correct duplicate appointment warning when patients have the same name but different middle initials

May 15, 2009 (7.10.8)

- Add Patient Unique Address Label-5160 for laser labels
- Add Patient Unique Address Label-Dymo for Dymo printer labels
- Change Patient Chart List report to Chart number Order
- Add multi practitioner support to Laser Invoice – Short
- Add Patient Mailing List for Practitioner that lists only patients that have seen the selected practitioner
- Correct Payment Reconciliation reports to properly report Refunds
- Correct duplicate records on Extended Statement when long ledger notes exist
- Correct Reports not printing to the correct tray when it is not the default tray
- Enhanced Scheduler refresh to only refresh when an appointment has been added or editing on the same day as being viewed
- Always ask for confirmation when automatically changing the patient registration date even if it was blank before
- Enlarge patient email address field in Edit Patient
- Correct province code for Newfoundland to NL
- Correct wrong reason being displayed on a new appointment after using Clear fields
- Correct negative 3rd party payments on Payment Reconciliation reports
- Correct error in Treatment Plan, Save button
- Change use of temporary tables to in memory cursors when collecting data to display on the Scheduler to increase reliability and speed
- Do not cross out names start with "Nos" on the Daysheet report
- Add Dymo Birthday label
- Enhance queries for Daysheet reports to respect flag to display Ref/Memo field on the Scheduler
- Improve speed on Patient 3rd Party Statements
- Correct Patient Followup Reports, Envelopes and Labels showing no data
- Remove ICBC GST from all Patient Receipts
- Correct Year label on Practitioner Write-off report
- Correct CEUpdate_mfc.dll installer error (validate 3 not found) on new installation
- Do not allow users with security level 0 to click on Bill button in the Scheduler
- Add integration for ChiroWrite EMR software
- Correct slow patient refresh on Scheduler
- Correct occasional Scheduler Refresh misfiring. Change second hand yellow/green when timer checks to see if Refresh is needed.
- Enhance Scheduler speed to eliminate dates not showing properly on the calendar

April 16, 2009 (7.10.7)

- Correct phone number not getting refreshed in the Scheduler screen when another patient name is typed
- Remember screen size and last group selection (All or current) in Summary of Appointments for each Practitioner screen
- Correct notes sequence number when storing ledger notes. This is causing Statements and Ledgers to show duplicate lines when long notes are stored on a ledger entry.

April 14, 2009 (7.10.6)

- Increase font size on Reports screen
- Initial Journal Writer module (only 3TECH can turn it on)
- Correct subscript error on Daysheet, Daysheet Toner Saver, and Daysheet with Phone Numbers
- Correct disappearing graphic on Recall/Reminder List icon
- Add ability to Browse to a Folder in Report Export
- Correct "~" being printed in the 3rd slot of an appointment on Daysheet reports
- Correct GST amount being left as outstanding on Invoice Reports
- Suppress Transfers and Payments which net to 0 from all Practitioner Production reports

Mar 31, 2009 (7.10.5)

- Add extra fields to Histappt
- Ensure all appointment records in required date range get archived
- Enable Escape key in the calendar lookup to cancel the screen
- Add category lookup in Edit Fee code screen, automatically add category 0 and 6 if none are found
- Do not allow *Note records to be Arrived and changed to a patient
- Enable Escape key to cancel from Rescheduling an appointment
- Enhance database repair utility to correct record count errors
- Add Export to Adobe Acrobat (pdf) and Excel (xls) in Report Preview screen
- Correct calendar lookup in OTH screen
- Correct F11 behaviour where it occasional changes the patient in the Reception screen
- Correct Save on Invoice notes in Edit Practitioner when data has leading spaces
- Mark all appointments for different practitioner as Billed when billing for all Visits on one Invoice
- Correct error when cancelling the Practitioner lookup list

Mar 4, 2009 (7.10.4)

- Update Crystal Reports print engine to Version 10
- Update all report files to Crystal V10
- Add ability to remove the ref/memo field from the Daysheet report
- Correct duplicate popups on the scheduler about a patient not being in for xx days
- Display negative BOH on Fee Code List
- Improve operation of the Invoicing screen
- Correct posting in Inventory Receipts
- Add support for different label sizes stored in the report
- Restore Default Billing Template in Edit Practitioner
- Restore Default Billing Template in Edit Patient
- Restore Discount in Edit Patient for "I"nstitute option
- Allow <enter> key to jump to Invoice Line from Clerk field
- Set Active flag and Registration date when a new patient is added directly from the Reception screen
- Do not allow Reschedule when a userID has a level 0 security setting
- Add exclamation mark on Reminder/Recall List icon when records exist for the current date
- Add Patient Fee field to Reception screen
- Make Practitioner List icon the same on Scheduler and Reception screens
- Make Today button and Practitioner List available during Reschedule
- Allow the re-typing of the phone numbers in Edit Patient without having to delete them first
- Resetting Default Paper Size on a printer after a custom print job has completed
- Correct Reprint of MSP Submitted File Exchange report
- Make MSP Claims Report print in Chart + entryno order
- Correct numeric overflow error on appointments that have been rescheduled more than 9 times
- Delete temp files from C:\ClinEsse\Temp if no longer needed
- Keep Clinic Essentials open but minimized when using HelpDesk shortcut from Help About screen
- Do not change billing practitioner back to default after saving an Invoice
- Improve dialogue text asking for Updates folder
- Correctly respect Start and End Dates for column headings on Scheduler
- Ensure all required fields are blank when adding a new patient
- Make inventory selection and lookup the same in Receipts as in Invoicing
- Do not set an Inactive practitioner as the default practitioner when adding a new patient
- Make right click and left click on the appointment show the appointment phone number and the drop down list show the patient phone numbers
- Support blank clinician field on "I"nstitute Invoicing screen
- Ensure all required fields are blank when adding a new inventory item
- Ensure that Find Appointments lists archived appointment records

Jan 20, 2009 (7.9.14)

- Correct Referral on Group Daysheet
- Add UserLogIn to re-index procedure
- Correct calendar in Treatment Plan screen
- Correct the practitioner colour on Find Appointments
- Correct report print from calendar view
- Correct clinician field in first billing
- Only allow level 9 users to sell InActive items
- Correct GST and PST totals on short Invoice
- Add mscomct2.ocx to distribution files
- Correct freezing when using Item Number lookup from the Invoicing screen
- Make WCB Reports that have Yes,/No question, default to blank
- Expand WCB field on Reception screen
- Make Summary or Practitioner screen use selected practitioners only to determine time interval
- Correct Record out of Range error in Reminder/Recalls

Nov 19, 2008 (7.9.10) includes 7.9.9

- Correct error on calendar lookup in Edit Practitioner, Template tab
- Re-add support for calendar colours on Scheduler
- Correct F12 losing patient after using F12 several times in a row
- Correct error when arrowing down the Block Time List
- Correct error when double clicking on a Practitioner on the Practitioner list
- Length PHN field in Tall Scheduler view
- Support Bold setting on patient names in scheduler grid
- Correct Add New Patient not filling form correctly
- Increase MSP Submission batch creation speed. Billings more than 24 months old are ignored.
- Respect setting for Default Practitioner on adding a new patient
- Add scheduler refresh button
- Correct calendar lookup in Archive screen
- Set initial cursor focus to Start Date in S/L screen
- Ask to reset visit counters when changing a WCB claim number
- Do not allow an appointment to be saved in a column greater than the maximum column number for the practitioner
- Changed lookup calendar colours to make them more visible
- Correct scheduler refresh after clicking Confirm in List View
- Correct problem causing "Play appointment Save sound" to be reset on startup
- Correct Daysheet report for clinics not have c:\windows\temp as their temporary folder
- Add Microsoft MSVCR70.dll to distribution for PCs that do not yet have it installed
- Add Invoice Date into Tab order in Inventory Receipts screen
- Correct Scheduler calendar going back a week when clicking on a week where Sunday was the first day of the month.
- Changed all calendar lookups to have the week start on Sunday instead of Monday
- Make the first PC to start Clinic Essentials cleanup the Temporary folder

Oct 7, 2008 (7.9.8) includes 7.9.7

- Correct F11 and F12 switch from Scheduler to Billing screen
- Enhance weekly view screen to understand extra time, reason and colours

Sept 30, 2008 (7.9.6) includes 7.9.5

- Correct buttons for Find Appointment, Treatment Plan and Reminder on Scheduler Wide
- Make right click behaviour identical to left click while in the Scheduler
- Correct individual appointment list when double clicking on a slot in Monthly view
- Correct wrong patient name in Add function or Arriving a new patient
- Correct error when deleting appointment in List view
- Restore missing Default F-Key setup to Edit patient, Other Tab
- Add Alternate name to Daysheet Reports

July 29, 2008 (7.9.4)

- Make time column in Schedule Bold
- Correct calendar in Archive function

- Correct horizontal scroll bar in Summary of Practitioners
- Correct initial screen when Scheduler opens
- Correct disappearing command buttons after Re-Schedule
- Correct grey Schedule after a Re-Schedule is performed
- Add ability to update GDI+ on Windows 2000 if necessary
- Add mscomct2.ocx to CERunTime installer
- Correct Group by error on Receipt printing
- Correct Order Saving when more than one practitioner is on the Order
- Enhance Scheduler refresh speed
- Correct patient changing when the month is changed on the Scheduler
- Correct the name in the Edit Patient screen when arriving/adding a new patient
- Correct the address display in scheduler after saving a new appointment
- Correct error closing Specialty Code list
- Add ability to set fonts to Bold in Scheduler, Find Appointments, Reception and Invoicing screen
- Correct occasional EOF error on Summary of Appointments screen
- Set Clinic Essentials main to screen minimum size to 1024 X 768
- Make highlighter in Patient List consistent across all columns
- Remove Remind options from Recall screen
- Correct ODoctor error when editing patient in Reception screen
- Correct Monthly view past 9:00AM
- Correct Change practitioner in Monthly viewMonthly View
- Lock columns in Scheduler so that they can not be re-arranged
- Make Scheduler refresh properly after performing a Billing
- Correct Scheduler Action buttons not changing colour when clicking on an appointment. Only 'Clear' as changing to Red
- Correct prices missing from Edit Fee code
- Add ability to set and submit a End Time for an appointment when billing
- Correct Scheduler going grey after deleting an appointment just entered
- Correct Scheduler going grey when displaying a day other than today and doing an automatic refresh
- Add Treatment Plan button
- Add ability to add a column header for a PractionerID greater than 99
- Correct Add Patient information after Arriving a New Appointment
- Re-add Alt buttons to access icons as an alternative to using the mouse
- Reduced minimum window size for main Clinic Essentials window so that it fits on 1024 X 768

February 22, 2008 (7.9.3)

- Improve support for Vista Mail. Pop warning if no email accounts are set up
- Add Price column to Fee Code List
- Correct calendar lookup in Reminder/Recall List, Add
- Expand WCB number on Scheduler screen
- Change lookup buttons in Edit Patient to new icons
- Remove default template from Edit Patient, Other
- Make Reminder/Recall screen refresh when changing the date range
- Limit changing Inventory to InActive to level 9 users
- Add clinician scheduling and billing to "I"stitution version
- Correct Weekly Block Time to work on weekends as well
- Correct F11/F12 switching back to Scheduler after Billing
- Changed current selected date to Red on calendar in Scheduler
- Correct Data Type Mismatch error when applying payment to multiple invoices
- Support Letterhead flag in Extended Statement
- Add location field to Inventory screen
- Correct occasional problem with screen going blank after deleting an appointment
- Add Ref/Memo in Scheduler option in Tables, Configuration, Appointments

January 15, 2008 (7.9.2)

- Correct Date lookup in Inventory Receipts screen
- Resize List of Exchange Files screen to expose Exit button
- Update Edit Patient Information button in Recall/Reminder screen
- Resize Inventory Receipts screen
- Correct error in Extended Statement Report
- Correct error closing Fee Code List with X

- Correct program name in Title bar on "I"stitution option
- Correct date lookups in Block Time
- Correct F11, F12 and Scheduler button in Reception screen

December 20, 2007 (7.9.1)

- Improve support for Slave PC update from shared drive
- Update calendar buttons in WCB Reports screen
- Correct addition of Schedcol table where ClinicEssentials upgrading from version less than 7.8
- Correct wrong patient being Arrived or Cancelled in Scheduler
- Sort Patient Mailing List Report on Group then Last name
- Change get license key so that a program update is not needed
- Correct duplicate table error in Patient Mailing List Report
- Suppress screen flashing in Scheduler
- Correct patient name changing when changing practitioners in the Scheduler
- Remember size and position of Inventory Receipts screen

December 13, 2007 (7.9.0)

- Port Clinic Essentials to Microsoft Foxpro 9 for Microsoft Vista compliance and add the ability to support different monitor sizes and screen resolutions
- Make Clinic Essentials main screen and Scheduler re-sizable
- Create new calendar drop down screen for date lookups
- Clarify tool tips on all icons
- Create a tall view and a wide view for the Scheduler, selectable by PC
- Update icons to newer Windows style icons
- Make Invoicing screen re-sizable, remember size and position
- Remember position of Patient Information screen – not yet re-sizable
- Do not pickup name in Scheduler from '/////' appointment slot
- Remember size and position of Recall and Reminder screens
- Remember size and position of Recall/Reminder List
- Remember size and position of Fee code list
- Make email reminders work on Microsoft Windows Vista
- Correct Inventory Edit security
- Allow a no charge fee code '3333' to be sent to MSP
- Allow Fee Code list to be resized, column positions changed and remembered on each PC
- Allow Patient list to be resized, column positions changed and remembered on each PC
- Add security permissions to Inventory Receive. Level 9 required
- Allow the number of labels to print to be changed in the Inventory Label screen
- Do not allow the system to pick up another name when in Reschedule mode