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Phoenix Weekly Release 0.0.0.1481
## Phoenix Online DPMS

Weekly Release

Build 0.0.0.1481 | January 15, 2018

These are the highlights of the new features available in this week's Phoenix DPMS release.

Practice Pulse

This week's release includes the implementation of the initial version of the Practice Pulse analytics module. Practice Pulse is an analytics dashboard that provides useful key performance indicator (KPI) modules including various financial, scheduling, and productivity metrics. Currently, there are nine widgets or modules available including things like the Treatment Plan widget which displays the booked vs. non-booked treatment plans as well as the amount of treatment plan revenue currently in the practice's pipeline. Additionally, the Daily Revenue by Provider widget provides the average daily production for each provider for the specified month.

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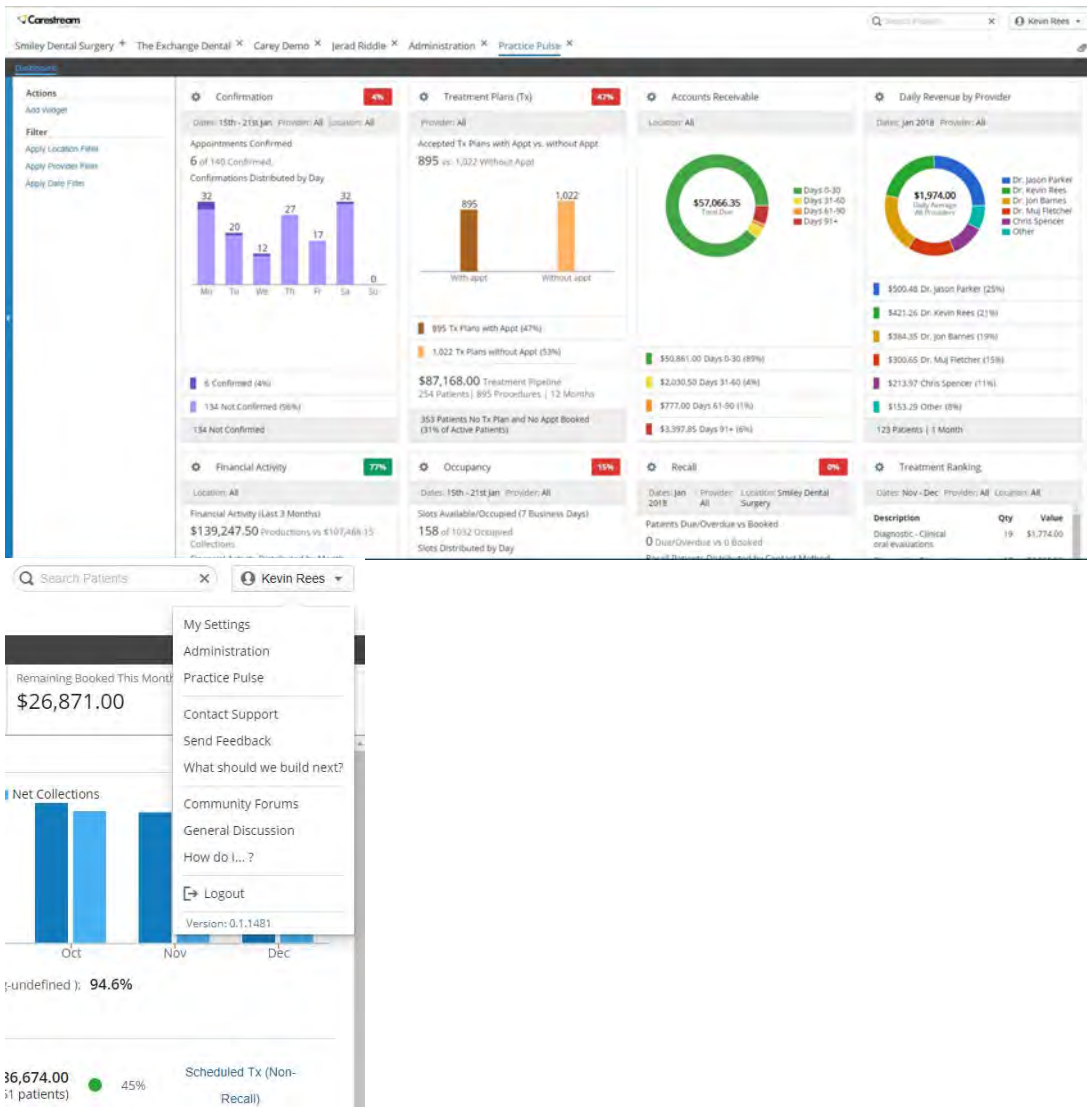
Users can get access to the Practice Pulse tab in Phoenix by selecting it from their main user menu. From there it will be opened and maintained as the right-most context tab and can be freely viewed, accessed, closed, and reopened. Data can be filtered accordingly, displaying information for all practices and providers or a specific practice and/or provider as well as specified time period (as appropriate). The Practice Pulse view is customizable, allowing users to individually determine which widgets are displayed as well as their overall layout / ordering. Next steps for Practice Pulse include the enhancement of the filtering controls as well as workflow integration with the existing Phoenix functionality (e.g., tying the Accounts Receivable module to the main A/R List UI).

Schedule View Enhancements

In response to some feedback from our Beta customer, as well as from Brain Trustees and internal stakeholders, this week's release includes some UI enhancements to the Schedule Day View that support primary scheduling workflows. These enhancements help to ensure that primary appointment information - such as patient name and scheduled work - is always

displayed on the Appointment Tiles, even when the appointment is of minimal length (e.g., 15 minutes). Additionally, these changes also resolve some interaction behavior issues that have been reported during testing involving shorter duration appointments (e.g., 15 or 30 minutes). This includes the ability to easily book these appointments using the embedded Appointment Tile controls (add, block, and cancel), the ability to easily modify the appointment duration through direct manipulation of the Appointment Tile (e.g., click and drag), and the ability to directly access the Appointment Details popover with a single click. We believe that these UI enhancements will go a long way to address some workflow usability issues that existed in previous builds.

Data Model Enhancements
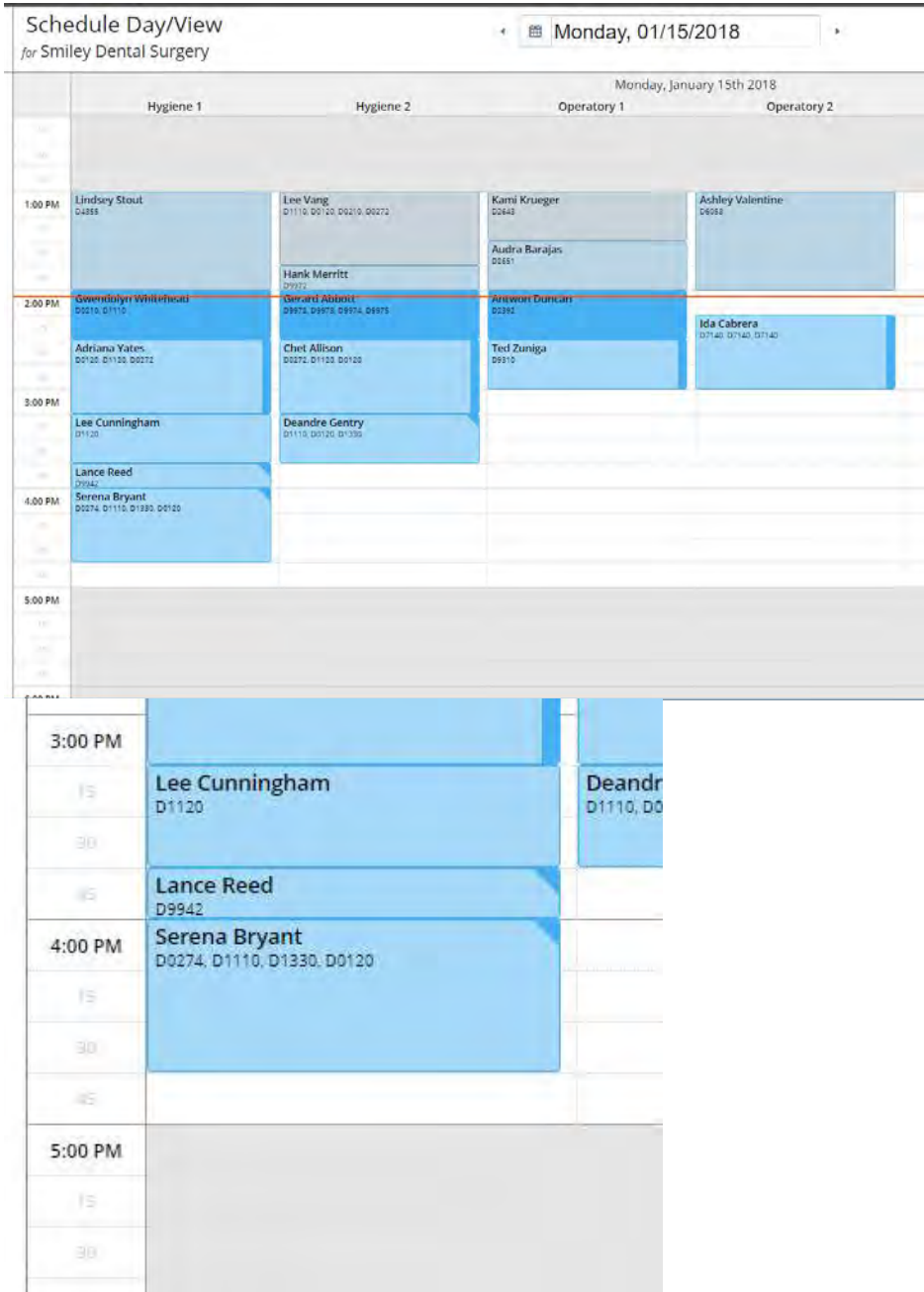
While not readily apparent to users, this week's build also includes a lot of "under the hood" work to the procedural data model that impacts the way that the patient's procedure history is managed - from treatment planning to scheduling appointments to charting and posting completed work. This reengineering of the data model was vital to support the effective management of maintaining a more accurate status of the patient's clinical history as well as the upcoming changes to the charting functionality. Enhancements to both the Treatment Planning and (Hard Tissue) Chart are planned for upcoming releases that will greatly expand and improve the clinical experience in Phoenix.

Optimizations and Fixes

The following fixes and optimizations have been also been added to Phoenix this week.

1. Resolved a defect in which completed appointments were not being added to an updated Checkout Queue.
2. Fixed a UI defect in which the Cancel (X) control was not always available on Schedule Day View selection, especially when the time selection / slot was less than 45 minutes.
3. Addressed a bug in which the visual presentation of Appointment Tiles was not accurately reflecting the current appointment status in some cases (e.g., Scheduled vs. Seated).
4. Fixed a UI defect in which the patient name associated with the appointment was not visible on the Appointment Tile in the Schedule Day View for short appointments.
5. Addressed a handful of related bugs with the Current View controls in the Schedule Day View in which user selections were not persisting across sessions and users were able to create views with no active chairs.
6. Resolved an issue in which failed appointments would sometimes get duplicated when rescheduled.
7. Fixed a defect that involved appointments not appearing on the Schedule Day View in some circumstances.
8. Addressed an interaction behavior issue with tabbing behavior in form-based UIs in which multiple TAB entries were needed to put focus on the next field / control.
9. Resolved a few UI defects in which content on the Patient Home Page was not rendering correctly at minimum resolution.
10. Fixed a defect in which an error occurred when creating a new patient from the Patient Search control.
11. Addressed a technical defect in the Schedule Day View in which invalid date formats could be produced when the date / calendar control loses focus.
12. Added the saving indicator to the Patient Notes controls to provide system feedback to the user during instances in which record saving is not immediate.
13. Resolved an issue in which inactive procedures were still being added to appointments and treatment plans when added through the use of a group procedure.
14. Fixed a defect in which validation errors for required procedure fields were raised in Appointment Cards even after associated procedures were removed.

15. Addressed an issue in which errors occurred when trying to save appointments under certain conditions involving procedures requiring a tooth number.
16. Resolved a workflow issue involving the use of group procedures within the patient Treatment Plan and the ability to manage the individual procedures (in the group).
17. Fixed a defect in the handling of appointment and procedure status when scheduling an appointment from the patient's Treatment Plan UI.
18. Addressed a defect in which an error was procedures upon trying to save the Patient Record in some cases.
19. Resolved a defect in which saved Group Procedures could not be reopened and edited.
20. Fixed a defect in which edits to existing Treatment Plan items were not being saved.
21. Addressed a workflow issue in which Treatment Plan procedures could be added to an appointment multiple times.
22. Resolved a technical issue in which validation failure when saving a Treatment Plan would cause the app to hang.
23. Fixed an issue with deferred procedures (from the Treatment Chart) in which they would still appear in the Checkout Queue and the Appointment Card details.
24. Addressed a technical issue that occurs when multiple blocked time events are added to a single day.
25. Resolved a UI defect in which the Remove (X) control was not visible / available on Blocked Time events when a large number of chairs are present in the Schedule Day View.
26. Fixed a defect in which deferred procedures (from the Treatment Chart) would be automatically marked as completed when the appointment is completed from the Schedule Day View.
27. Addressed a UI issue in which the start time and duration of the Blocked Time event were not displayed upon hover.
28. Fixed a defect in the Hard Tissue Chart in which swapping a tooth from a permanent tooth to a primary tooth marks the tooth as missing.
29. Resolved a workflow issue in which users were able to schedule appointments on past dates.
30. Fixed a UI issue in which the providers associated with an appointment do not display on the Treatment Chart when procedures are added through the Scheduler / Appointment Card.
31. Addressed a defect in which the Treatment Plan List UI includes patients even if all of those patients' treatment plan procedures are scheduled.
32. Fixed a technical error produced when the user deletes and appointment via the Pending List UI.
33. Resolved an issue in which procedures added to the patient's Treatment Plan were not immediately / automatically represented in the details of the patient's listing in the Treatment Plan List UI.
34. Fixed a technical bug in which Treatment Plan procedures could be duplicated during the record saving process in some cases.
35. Addressed an issue in which Treatment Plan procedures from deleted appointments were not able to be removed from the patient's Treatment Plan.

36. Resolved an issue in which the table rows in the Accounts Receivable UI were not able to be expanded.
37. Fixed a defect in which cancelled appointments of "Deleted" type were not removed after the appointment status was saved.
38. Addressed an issue in which the Schedule Day View was not refreshing after new chairs are added to the location (refresh required user logout / session termination).
39. Resolved an issue in which the associated date of an appointment was not accurately translated and reflected under certain circumstances.
40. Fixed an issue in the Treatment Chart UI that was preventing the creation and editing of Visit Notes for an appointment.
41. Addressed some general logical loopholes with the management of the status of procedures via the Treatment Chart UI.
42. Fixed a defect in which previously inactive procedures would create errors when posted in the Patient Ledger.
43. Resolved an issue in the status management of Treatment Plan procedures when appointments are cancelled.
44. Fixed a defect in the Treatment Plan module of the Patient Home Page in which the status of pending appointments was not accurately reflected.
45. Addressed an issue in which the status of Treatment Plan procedures are not accurately reflected when managed through the Appointment Card UI.
46. Resolved a defect in which the Treatment Plan List UI was not displaying patients based on their location preferences.
47. Fixed a defect in which appointments containing Treatment Plan procedures are not displayed on the Schedule Day View when canceled and then rescheduled.
48. Overall reduction of backend solution warnings.
49. General improvements to the Scheduler responsiveness to backend changes.
50. General reduction of source code, removing duplicate files.

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