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jfrizzell

CS Dental Employee



09-06-2017 02:27 PM

Phoenix Weekly Release 0.0.0.491

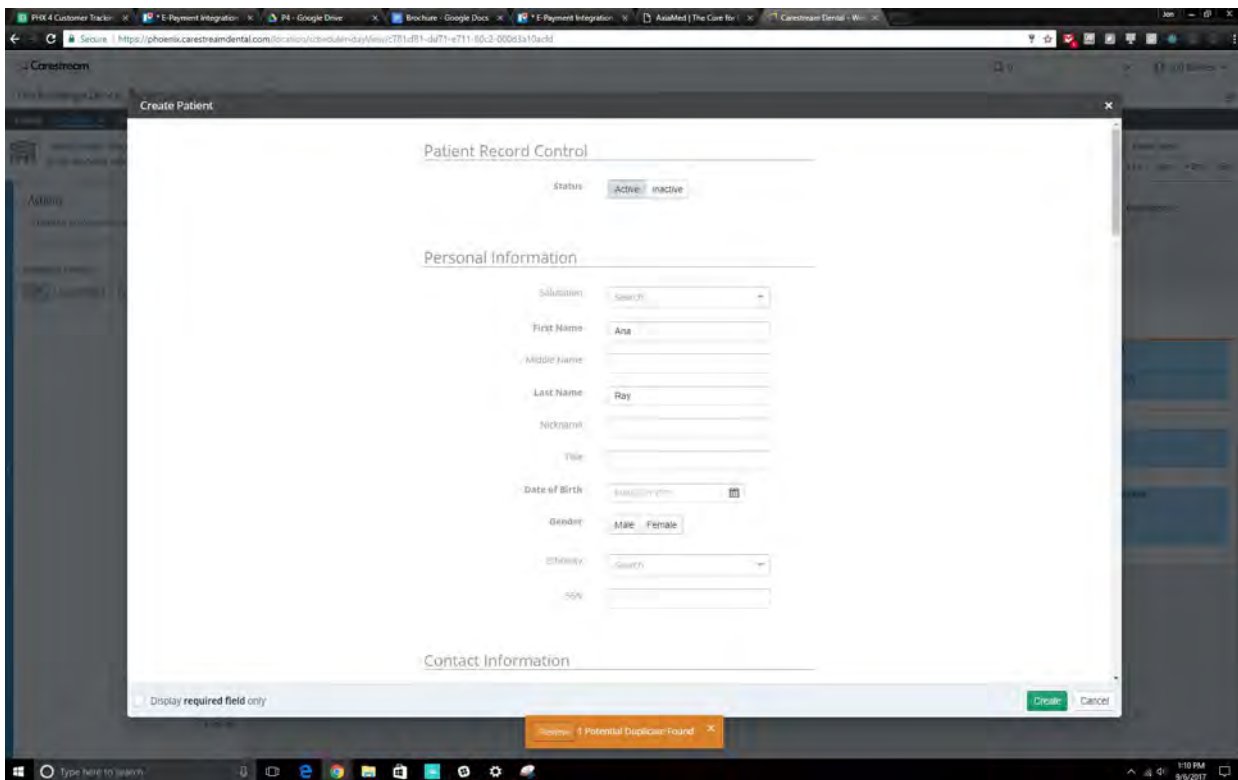
Phoenix Online DPMS

Weekly Release

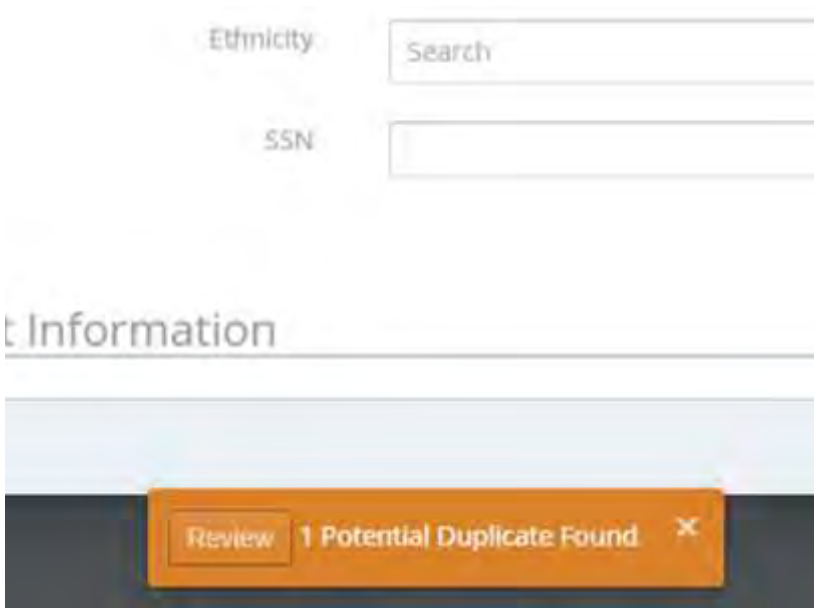
Build 0.0.0.491 | September 06, 2017

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

Duplicate Patient Detection Logic

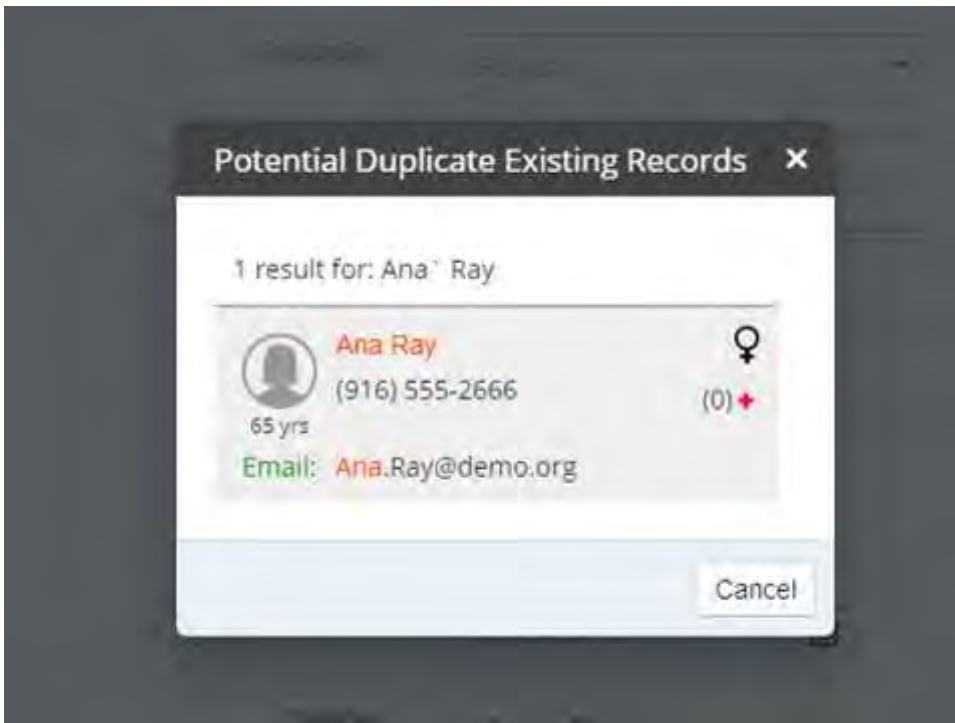


Customers have voiced their desire to detect and prevent creation of duplicate patient records. Phoenix now notifies the user if they are creating a new record that potentially matches an existing record, preventing a duplicate record being added to the database.

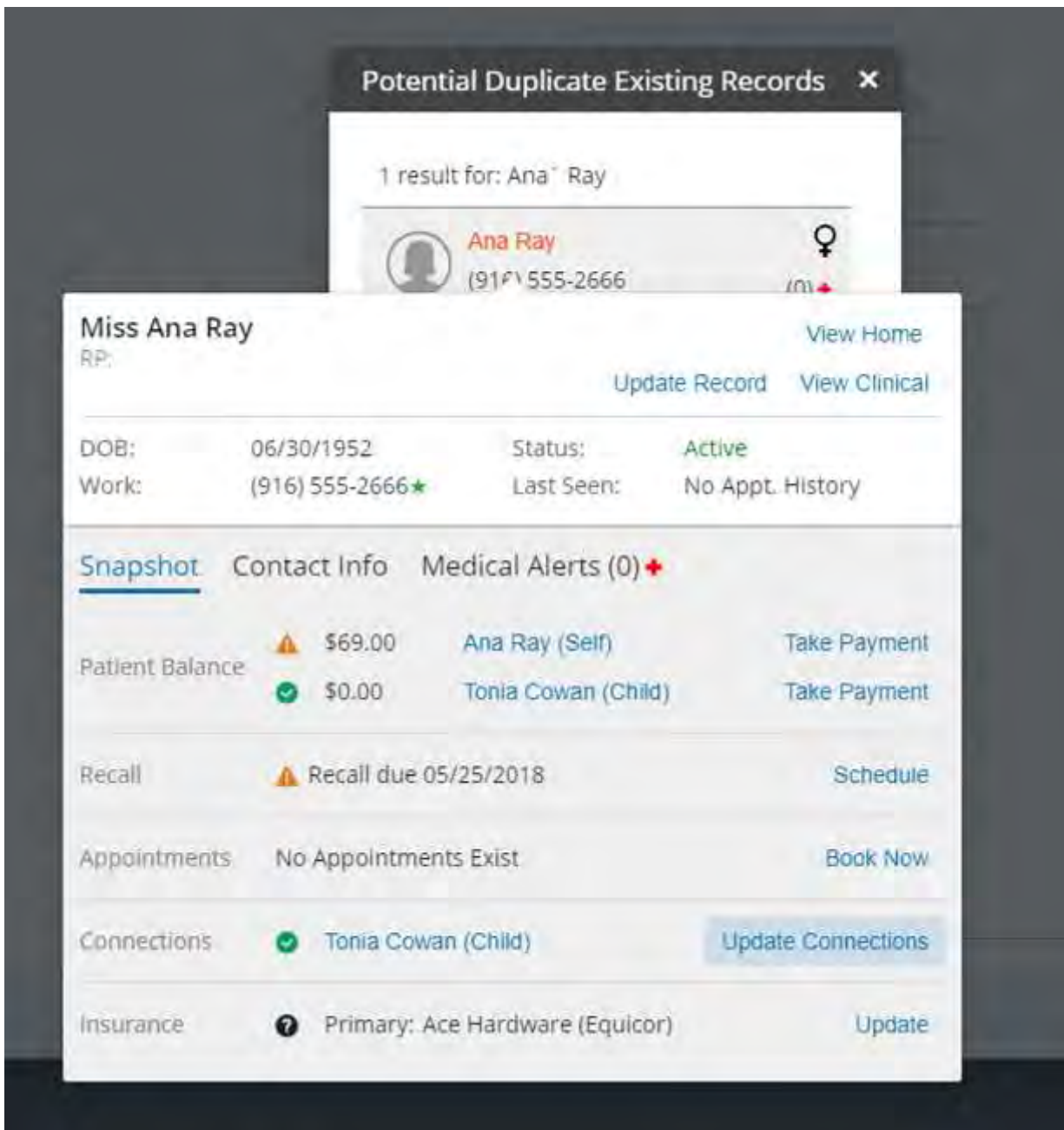


A notification is now shown at the bottom of the screen when a duplicate patient is detected. Duplicate detection and notification happens in real time, as details are added to the new patient record.

When the "Review" button is clicked, patient minicards are displayed for the patient(s) detected as potential duplicates. Matching record details are highlighted for each potential duplicate.



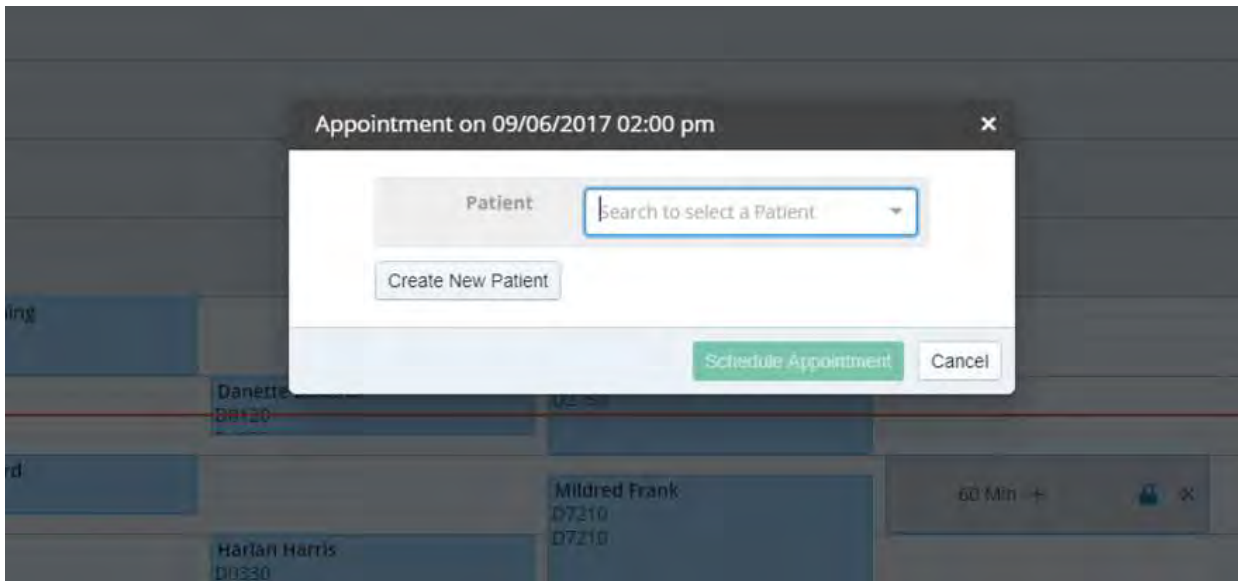
As with all locations in Phoenix where patient minicards are shown, the user can get more details about the patients listed via the patient snapshot.



This helps to verify whether the existing patient record does indeed match the patient that was being newly created. If the user determines that the record is a match, the system will cancel the patient add and leverage the existing record.

Adding a Patient During Appointment Scheduling

Users can now create a new patient record (if needed) as part of the appointment booking process.



A new button has been added that allows the creation of a new patient record in case the patient does not already exist in the database. This can now be done without abandoning the appointment creation process.

Optimizations and Fixes

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

1. General cleanup of the patient homepage.
2. Patient notes now avoids invalid data from being added.
3. Tenants are now listed alphabetically at login.
4. Chair order is now correct on the scheduler main view.
5. Fix to timezone issue with checking out a patient on the scheduler.
6. Various optimizations to speed up database access and updates.
7. Avoid display of duplicate patient connections.
8. "System Settings" changed to "Administration" to better reflect the screen's purpose.
9. Various treatment chart optimizations.
10. Optimizations on the scheduler when dragging and hovering appointments.

 Add tags



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ADMIN tshaw

Community Manager



11-07-2017 10:12 AM

A few of us in the educational development department have been reviewing the software since we will be creating training content for it. We noticed that when creating a new patient there are a lot of required fields, will users be able to customize those in the case they don't want to have to answer all of those questions in the first conversation with the new patient?

Add tags

	1 Kudo
--	--------

Accept as Solution

Reply



MOD kevin_moloney

Moderator



11-08-2017 10:20 AM

Thanks for the feedback **tshaw**. We already have a few items on our list related to this point. Removing some of the require fields is easy and makes sense. However, others will require more thought as some of the logic and automate workflows in Phoenix key off of these fields. We will continue to investigate.

Add tags

	1 Kudo
--	--------

Accept as Solution

Reply



ADMIN tshaw response to **kevin_moloney**

Community Manager



11-08-2017 06:08 PM

Top

Thanks for the response!

 Add tags

 0 Kudos

Accept as Solution

Reply



mgent

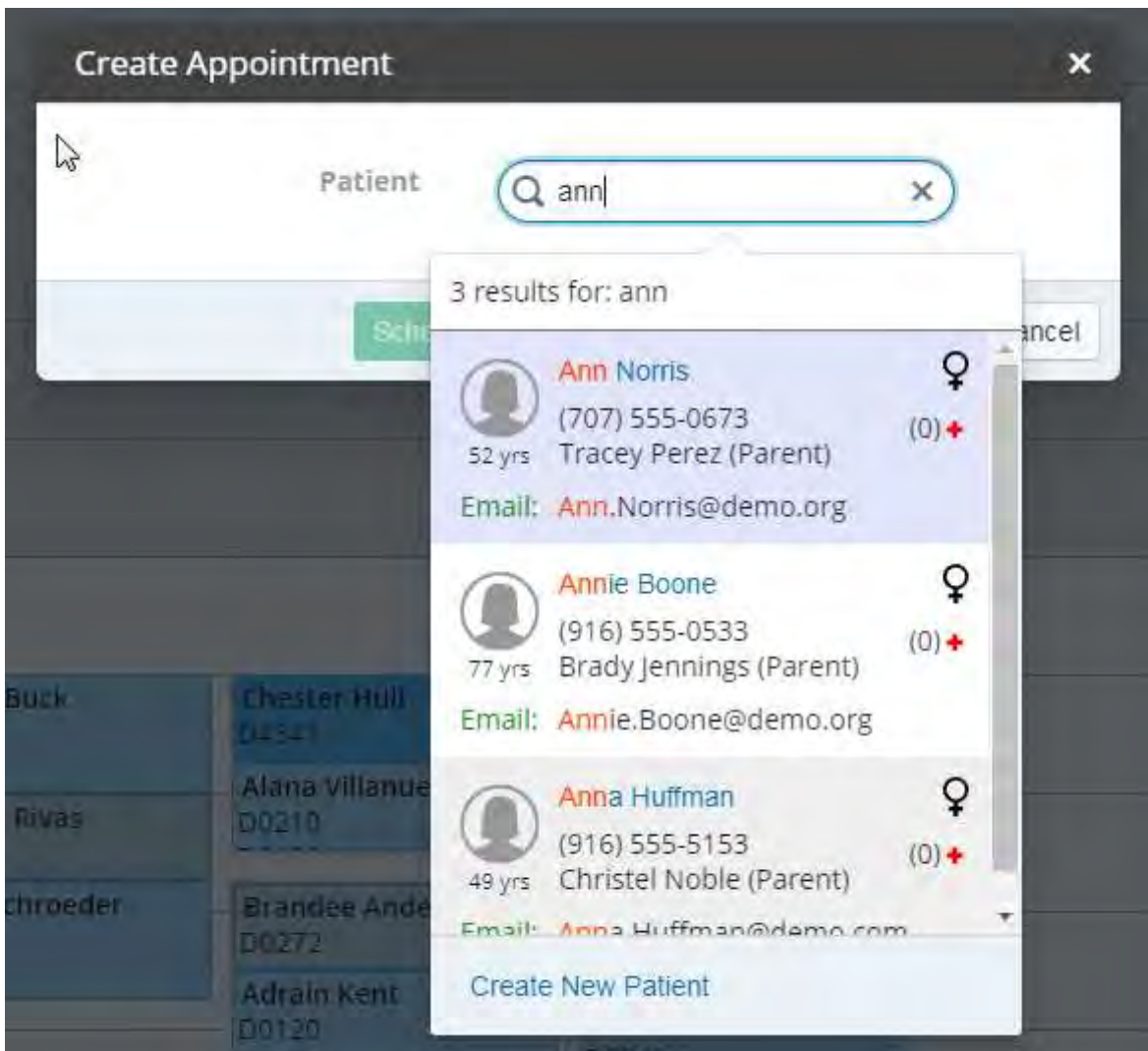
CS Dental Employee



09-12-2017 11:14 AM

We have just deployed another update with a few enhancements to this release:

- Searching for a patient when creating a new appointment now uses the global search so the patient mini card is shown in the results and the patient popup can be used.



The screenshot shows a 'Create Appointment' dialog box. At the top, there is a search bar labeled 'Patient' with the text 'ann' entered. Below the search bar, a dropdown menu displays '3 results for: ann'. The results are listed as follows:

Name	Phone	Age	Parent	Gender	Actions
Ann Norris	(707) 555-0673	52 yrs	Tracey Perez (Parent)	Female	(0) +
Annie Boone	(916) 555-0533	77 yrs	Brady Jennings (Parent)	Female	(0) +
Anna Huffman	(916) 555-5153	49 yrs	Christel Noble (Parent)	Female	(0) +

At the bottom of the dropdown, there is a link for 'Create New Patient'. The background of the dialog shows a list of patient names and IDs, including Buck, Chester Hull, Alana Villanue, Rivas, D0210, chroeder, Brandee Ande, D0272, and Adrain Kent, D0120.

↑ Top

Mrs. Ann Norris [View Home](#)
 RP: Tracey Perez (Parent) [Update Record](#) [View Clinical](#)

DOB: 09/25/1964 Status: **Active**
 Home: (707) 555-0673★ Last Seen: No Appt. History
 RP Main: (916) 555-6745★

Snapshot Contact Info Medical Alerts (0) +

Patient Balance	✓ \$0.00	Ann Norris (Self)	Take Payment
	✓ \$0.00	Beth Pratt (Child)	Take Payment
	✓ \$0.00	Tracey Perez (Par...)	Take Payment

Recall ⚠ Recall due [Schedule](#)

Appointments No Appointments Exist [Book Now](#)

Connections ✓ Beth Pratt (Child) [Update Connections](#)
 ✓ Tracey Perez (Parent)

Ann Norris ♀
 (707) 555-0673 (0) +
 52 yrs Tracey Perez (Parent)
 Email: Ann.Norris@demo.org

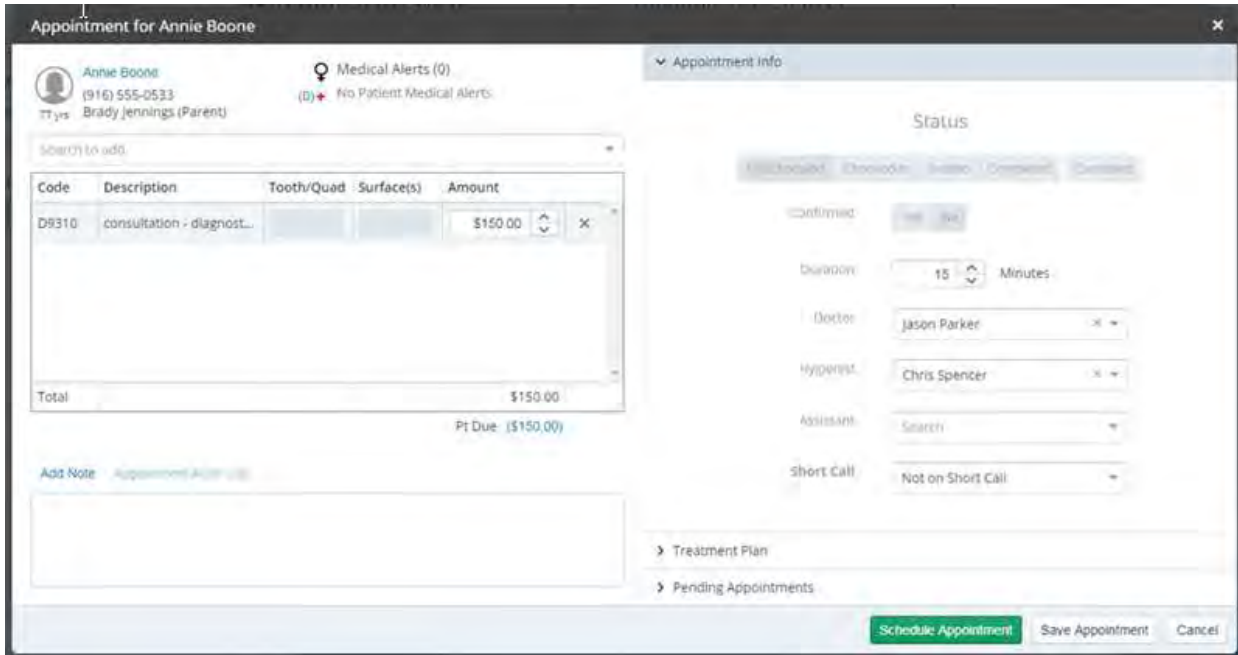
Annie Boone ♀
 (916) 555-0533 (0) +
 77 yrs Brady Jennings (Parent)
 Email: Annie.Boone@demo.org

Anna Huffman ♀
 (916) 555-5153 (0) +
 49 yrs Christel Noble (Parent)
 Email: Anna.Huffman@demo.com


[Create New Patient](#)

- The create new patient when booking an appointment workflow has been updated so it works the same way as when performing a patient search in that the create new option is shown below the results of the search. ↑ Top

- The appointment details dialog has been updated so it only shows the patients name once and the patient can no longer be changed once you are in the appointment details.



 Add tags


0 Kudos

Accept as Solution

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mgent

CS Dental Employee



09-11-2017 09:41 AM

We have deployed a small update to this release with a few minor enhancements and optimizations based on feedback we have received.

- Performance of the create new patient workflow improved
- Increased the time the potential duplicate patient popup is displayed from 2 to 5 seconds.
- Highlighting of the selected patient in the list of potential duplicates has been improved.

 Add tags


2 Kudos

Accept as Solution

Reply



mgent

CS Dental Employee



09-08-2017 09:32 AM

The current rules for the Duplicate Patient Detection Logic are as follows:

- First name + last name match an existing record
- Email address matches an existing record
- First name + any phone number matches an existing record
- First name + street address line 1 matches an existing record
- Last name + date of birth matches an existing record

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3 Kudos

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