

## What's New

# Dolphin Management 8

---

### Requirements

---

Dolphin Management 8 has been fully tested and certified under Windows 7, Windows 8 and 8.1, Windows 10, Windows Server 2008 and 2012, SQL Server 2008, 2012 and 2016. Please see [www.dolphinimaging.com](http://www.dolphinimaging.com) for complete technical specifications. Dolphin Imaging 11.7 and Aquarium 3 are recommended for use with Dolphin Management 8.

---

### Treatment Card

---

- We added an **ALL** tab where you can view all layouts in multiple-layout treatment cards.
- There is a new **Treatment Card (Read-only)** option on the Patient right-click menu.
- We added Imaging Layouts. For each treatment card, specify whether to show a custom patient image or imaging layout by default.
- The birthday cake icon shows in the treatment card header.
- You can opt to save custom image settings per patient or not.
- Configure a different header for each layout.
- Specify a paragraph style for text field lookup items.

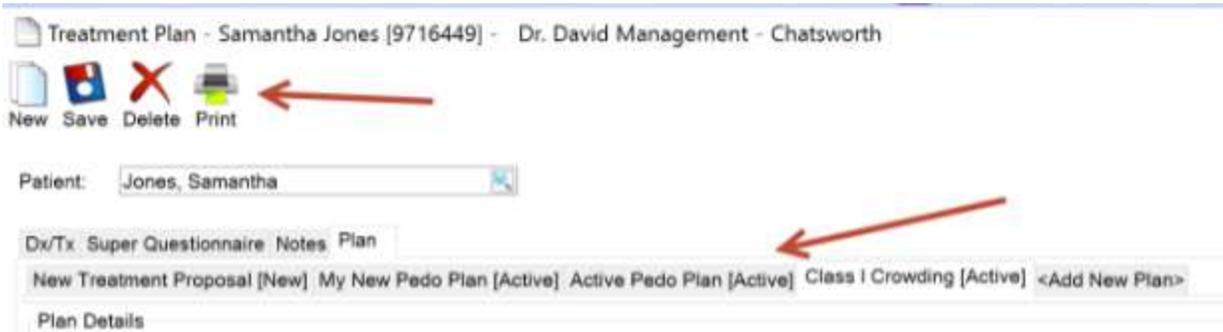
D	E	ASST	DR	PROC	TX Notes		
2/23/16	N	5		DELHERBST - Deliver Herbst Appliance	Deliver Herbst Appliance		
2/23/16	N			BB-1 - UR-1 Broken Bracket BB-2 - Broken Bracket	Check Headgear This was entered at 1:39pm kj asldkf as;ldkf asldkf a;lskdf j;alskdj fa;lskdj faskf; of a;lskdj faskdj faskdj f;alskdj fa;lskdj fe;skdj f;lskdj faskj df		
D	E	ASST	DR	EMP	PROC	TX Notes	Symp
2/23/16	C	DI			G		
D	E	ASST	DR	PROC	TX Notes		
3/03/16	C			Care Call Scheduled for 2/18/2014; Employee:Adam Administrator Closed; Notes: Test			
3/12/16	C	P		This is a comment entry I'm in the middle of working on, and here are some more notes I'm add			
D	E	DR	ASST	PROC	CHGS	TX	
9/09/16	V	DI	JR	CLEAN	D1120 D1330		
D	E	ASST	DR	PROC	TX Notes		
11/07/16	V			BOND30 - Bonding 30 minutes	Bonding 30 minutes		
D	E	ASST	DR	EMP	PROC	TX Notes	Symp
11/15/16	V	D	DM				
D	E	ASST	DR	PROC	TX Notes		
12/06/16	C			Aquarium "Users Meeting" Playlist started from Treatment Card for this patient			
D	E	DR	ASST	PROC	CHGS	TX	
12/16/16	V	DI		CLEAN	D1120 D1203 D1330	Visit #1	

---

### Treatment Plan

---

- You can have more than one active treatment plan for a patient, and all active plans are shown at the bottom of the treatment card.
- Use the new tabbed interface to reorder multiple active treatment plans.
- You can now print treatment plans

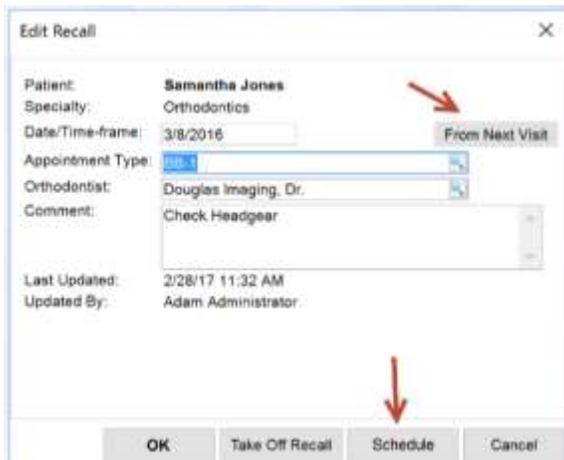


## Scheduling

- Drag and drop appointments to keep family members scheduled together.
- Drag and drop to reschedule patient or related patient appointments.
- Create schedule templates based on one or more orthodontists in your practice.
- Search the schedule using the orthodontist as a filter.
- Patient image (when available) now shows up in appointment tooltips.
- We added a time bar to show the current time on the schedule.



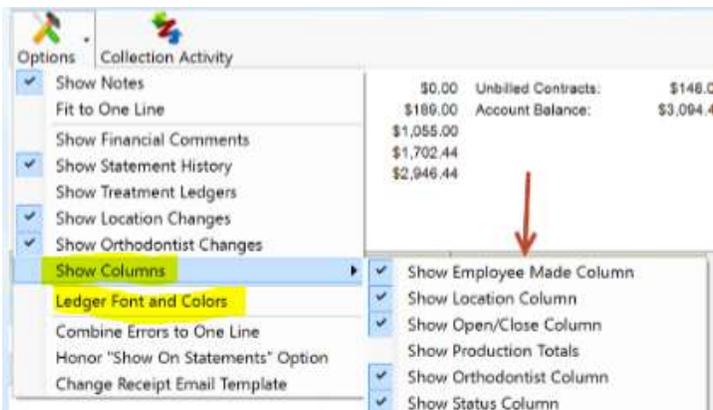
- Patient navigator now includes a Recalls tab, and each tab on the patient navigator shows the number of entries in parentheses.
- Drag and drop to quickly schedule a recall.
- Create Recall appointments from Next Visit entries
- Schedule Recalls quickly with new Recall screen features



- My Orthodontist practices can include a sign-in QR code that patients can use when signing in to the practice after arriving for an appointment.
- Email appointment slips and school excuses right from the schedule.
- Multiple-location practices can have unique appointment slips per location.
- Configure your system to automatically satisfy recall appointments.
- Automatically create patient alerts when appointments of a certain type are made or kept.

## Financial

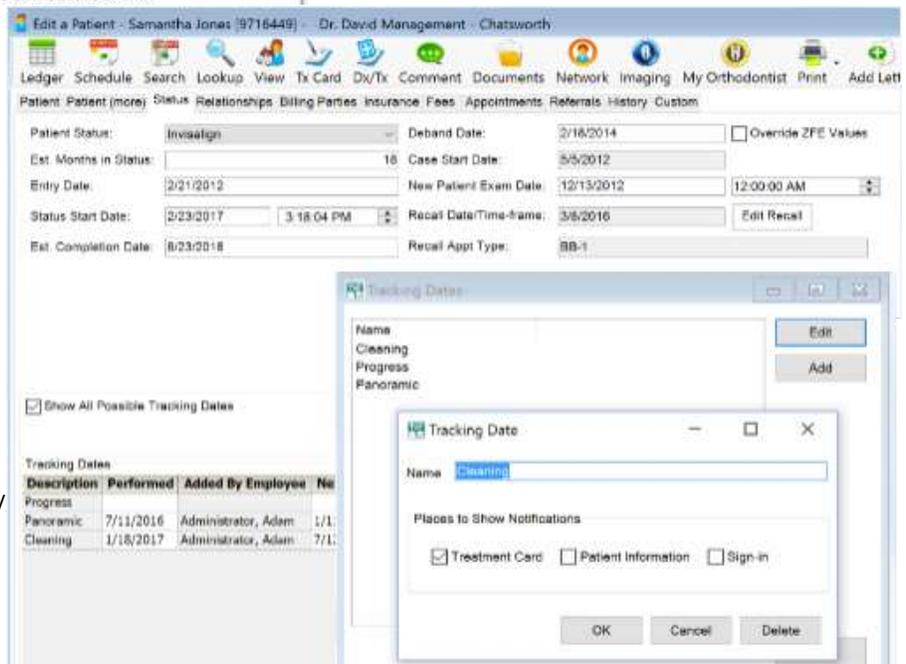
- Customize Ledger font, color, and size
- Hide or Show columns in Ledger, and Dolphin Management “remembers” your choices.



- Export deposits to QuickBooks

## Patient Information

- Customize tracking dates, and view history of activities performed and who performed them.
- Drag and drop insurance policies to indicate which is



primary (for patients with multiple insurance policies).

- You are prompted to change patient addresses when you change associated billing party address.

---

## Reports

---

- Quickly find reports by typing in a few letters of the report name or description.
- We improved Dolphin Interactive Report Tool (DIRT) performance and added new search fields in several categories.

---

## General

---

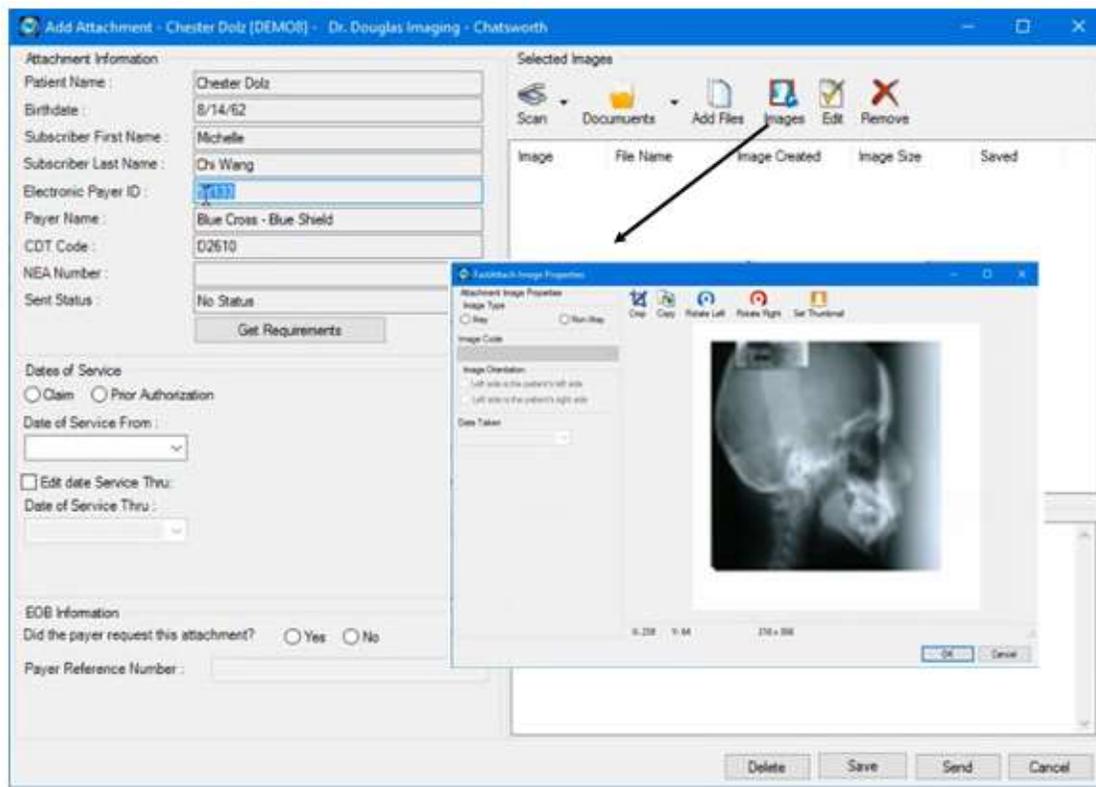
- We added a new Sign button in DLS for signing letters.
- Use Dolphin Mobile 4.0 and above to capture electronic signatures without a dedicated hardware signature scanning device.
- Right-click to print a label from the Letters screen.
- Search for doctors based on associated groups.
- Manually add phone calls to the call history log
- Dolphin Management 8 handles high-resolution displays better than in previous releases.

---

## Third-Party Integrations

---

- Send electronic insurance claim attachments, (reports, images, etc.) with NEA FastAttach.



- Send all patient, billing party and referring doctor emails easily and securely from Dolphin Management using the built-in Protected Trust integration.

The screenshot shows the Dolphin Protected Trust web interface. At the top left is the Dolphin logo with the tagline "Imaging & Management Solutions" and "A Patient's Technology". To the right is a navigation bar with an "invite" button and links for "Home", "Compose", "Inbox", "Sent", and "My Dashboard". Below the navigation bar, a welcome message reads "Welcome, kat.ross@dolphinimaging.com" with a "Sign Out" link. The main content area is split into two columns. The left column contains a "Welcome to Protected Trust for Dolphin Imaging and Management Solutions" message, explaining that Protected Trust uses high security standards and that users should log in to their account to send and receive protected messages. It is signed off by the "Dolphin Imaging and Management Solutions" team and includes a quote: "We believe trust and privacy are essential for building meaningful human relationships. People need to trust that their sensitive information is communicated privately." signed by the "Protected Trust Team". The right column is titled "Sign In" and prompts the user to sign in. It includes a "Your e-mail address:" field with the value "kat.ross@dolphinimaging.com" and a "Password:" field with a "Forgot password?" link. There are "Sign In" and "Keep me signed in" buttons, and a "Use different account" link. At the bottom left are links for "Support" and "Terms and Policies". At the bottom right is the Dolphin Protected Trust logo.