Feature enhancements

TOS/Medicaid Enrollment Self-Service in Practice Information

What's new

Practices can now enable TOS/Medicaid billing directly in Practice Information without submitting a backend support request. A new TOS/Medicaid Enabled toggle is visible to any user with access to edit Practice Information.

Why this matters

Practices can turn on TOS/Medicaid billing immediately instead of waiting on a support ticket.

Who this affects

Practices using or enabling TOS/Medicaid billing

What to expect

Existing TOS/Medicaid practices have been automatically migrated — no action required.

Action required: No action required.

Non-Started TOS/Medicaid Contracts Invalidated When TOS Is Disabled

What's new

If a practice turns off TOS/Medicaid, any contracts set up as TOS or Medicaid that have never been started are now treated as invalid. Opening one shows a read-only view explaining the invalid state.

Why this matters

Prevents staff from unknowingly working with contracts tied to a billing type the practice no longer uses.

Who this affects

Practices that disable TOS/Medicaid billing

What to expect

Started or completed contracts are not affected.

Action required: No action required.

Defects resolved

- **Ledger**: Fixed an issue where the Apply Payment option appeared in Patient and Family Ledger at Ortho practices. This option applies only to Peds practices.
- **Contracts**: Fixed an issue where creating multiple contracts consecutively from a Financial Arrangement caused Treatment Fee Amount and Plan Amount to intermittently show four decimal places instead of two.
- **Contracts**: Fixed an issue where creating a Contract from Patient Ledger linked to a signed Financial Arrangement with an Internal Payment Plan incorrectly locked the Contract Payments grid.
- **Contracts**: Fixed an issue where deleted transaction codes remained available in the Initial Claim lookup when creating a contract from a Financial Arrangement.

- **Contracts**: Fixed an issue where the Initial CDT Code field was empty for open item Financial Arrangement charges with linked codes.
- **Contracts**: Fixed an issue where the Employer Plan Type filter appeared on contract reports even when TOS/Medicaid was disabled.
- **Contacts**: Fixed an issue where companies and their point-of-contact recipients linked under Referrals/Professionals were omitted when sending letters or email from the patient menu, patient images, or treatment card.
- **Contacts**: Fixed an issue where the system failed to find a Home phone contact type when the name did not exactly match the expected string. The system now searches within the Phone group for a match.
- **Recurring Campaigns**: Fixed an issue where editing a Patient Care Follow Up campaign allowed saving a past date/time, causing the campaign to execute immediately instead of at the scheduled time.
- **Automation Suite**: Fixed an issue where editing a deleted Recurring Campaign created a new schedule, causing the deleted campaign to run unexpectedly.
- **Email Templates**: Fixed an issue where selecting the Letter Header or Letter Footer merge tag in a Heading or Paragraph element inserted raw HTML as plain text instead of the merge tag.
- **Automated Reminders**: Fixed an issue where header and footer images in Automated Reminder email templates displayed at incorrect width and height.
- **Mobile App**: Fixed an issue where patient images did not load in the iOS mobile app due to an imaging service authentication error.
- **Insurance Claims**: Fixed an issue where updated amounts for multiple Initial Codes on a contract were not reflected in the Claim document.
- **Patient History**: Fixed an issue where the document saved to Patient History when emailing an image with annotations or patient info did not match the actual file delivered to the recipient.
- **Treatment Card**: Fixed an issue where emailing an image from the right-click menu in the Treatment Card failed with an error that the system could not determine which image series was selected.
- **Monthly Review**: Fixed an issue where the Locations and Doctors filter fields overlapped after previewing the report.
- **Schedule View**: Fixed an issue where clicking Print Schedule on a view with no Columns or Chairs configured displayed an unhandled error.
- **DentalOS Integration**: Fixed an issue where DentalOS Email and DentalOS Phone were added to employee Contact Info with rank 0, preventing reordering with Rank Up/Rank Down.
- **Patient Portal**: Fixed an issue where the Patient Portal login page did not display a favicon.
- **Login Page**: Fixed an issue where the Cloud 9 login page displayed the marketing banner at full-expanded size in Firefox. It now displays correctly in all supported browsers.
- **Rebuild Claims**: Fixed an issue where the Location dropdown in the Rebuild Claims Utility could not be scrolled, preventing selection of locations near the bottom of the list.