Feature enhancements

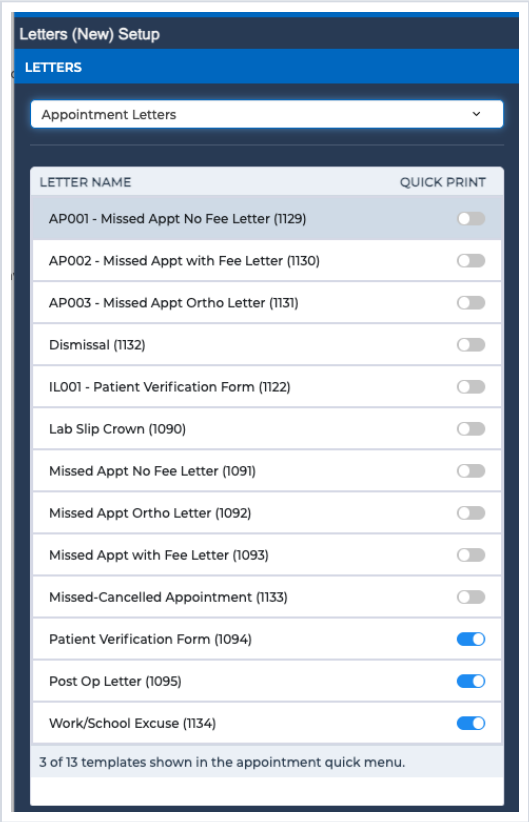
Print appointment letters directly from the appointment right-click menu

What's new
The Print option in the appointment right-click menu now includes a Letter Templates shortcut. It lists the Appointment Letters your practice admin has chosen for quick access, such as school excuses, and opens the letter for the selected patient and appointment. Admins choose which letters appear by turning on the new "Show in quick menu" toggle for Appointment Letters in Letters Setup.

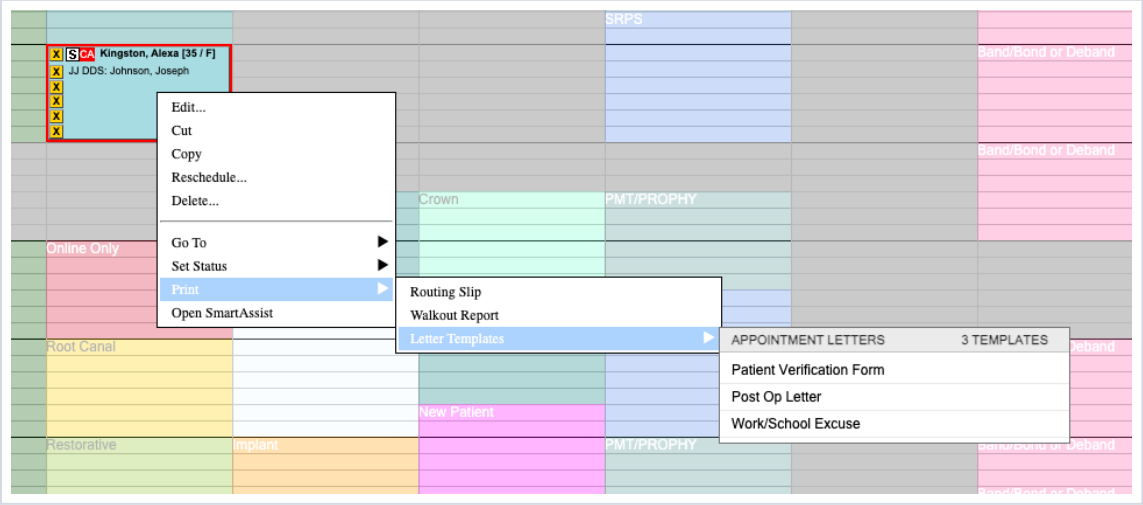
Why this matters
Front desk staff can print common appointment letters, like school excuses, right from the appointment book instead of leaving the Scheduler to find the patient in the Letters module. This saves steps and speeds up check-out, especially for busy practices such as pediatric offices.

Who this affects
Front desk staff and anyone who prints appointment letters from the Scheduler. Practice admins who manage Letters Setup also need to set up which letters appear.

What to expect
Right-click an appointment, choose Print, then Letter Templates to see a list of the quick-access Appointment Letters in A–Z order. Selecting one opens the letter for that patient and appointment. If no letters have been chosen yet, the list explains that no templates are configured and links to Letters Setup.



Print appointment letters directly from the appointment right-click menu (1 of 2)



Print appointment letters directly from the appointment right-click menu (2 of 2)

Action required: A practice admin must go to Letters Setup, select the Appointment Letters category, and turn on the "Show in quick menu" toggle for each letter the practice wants in the shortcut. The toggle is off by default, so no letters will appear in the Letter Templates list until an admin does this. Front desk staff do not need to do anything.

Defects resolved

- **Batch Insurance Payment:** Fixed an issue where an EOB attached while posting a Virtual Credit Card payment on the Batch Insurance Payment screen was not saved, so it was missing from the patient ledger. The attached EOB now remains available in the ledger after posting, so staff no longer need to re-upload it for each payment.
- **Denticon Pay:** We addressed an issue where a successful Denticon Pay payment could appear in CardPointe but not post to the patient's ledger. Successful payments should now be reflected on the ledger as expected.
- **Ledger:** Resolved an issue where some Planet DDS Pay card payments were reported to appear in the patient ledger hours after processing.
- **Restorative Chart:** Posting an explosion code from the Restorative Chart could show a "Failed to process procedure submission" error and leave out procedures that don't need a tooth number, such as IV sedation codes. All procedures in the explosion code now post without an error.
- **Scheduler:** Previously, reserving a Family Slot appointment in a Scheduler that was opened from another screen, such as Patient Overview, caused a blank browser tab to open in the previous window. This no longer happens, so reserving a Family Slot appointment won't leave an extra empty tab behind.