Dolphin Management 5

Fingerscan Security • Full Patient Database • Scheduling with Doctor-Time • Treatment Card • Document Organizer • Treatment Sequence Planning • Correspondence • Patient GPS • Operatory LightBar • Interactive Report Tool • Comprehensive Financials • Analysis Tools

Dolphin Management is a full-featured orthodontic practice management system that enables you to efficiently manage and organize your practice flow, especially if you have high-volume, multiple locations and multiple practitioners. With consistent feature upgrades and improvements, Dolphin Management combines an easy-to-use interface with powerful features.

Dolphin
Imaging & Management Solutions
a Patterson Technology

Choosing Dolphin Management

Enterprise Architecture.
Dolphin Management runs on the latest and most universal technologies available today. Built on a solid foundation of Microsoft's® .NET application development platform, and the enterprise-class database SQL Server, Dolphin Management is capable of securely connecting data and images from multiple offices with virtually unlimited capacity and optimal performance for your practice. Features multiple monitor support.

Flexibility.
Dolphin Management is installed with your practice's unique processes in mind, allowing you to choose the options you want, rather than having to accept an "off-the-shelf" configuration. Customize reports, treatment cards, scheduling and more. Dolphin is the only system that allows this degree of flexibility, so you're always in control.

Multiple-Office Remote Connectivity.
Dolphin Management runs smoothly under thin-client environments such as Microsoft® Windows Terminal Services and Citrix® MetaFrame, enabling seamless multiple-office access with minimal computer hardware investment. No matter how many locations you have, Dolphin supports your practice with the same outstanding performance.
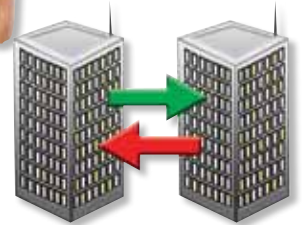
Intuitive Graphical User Interface.
All program functions can be easily accessed from the main graphic icon bar. All interfaces conform to the conventions of Microsoft Windows®, allowing users to easily navigate the program, while minimizing training time.

Training/Installation.
We utilize a structured, detailed process to transition your practice into Dolphin. Our expert technicians assist your Information Technology (IT) professionals in properly configuring network and computer needs. We conduct in-depth remote pre-training with your key staff and verify converted data. The implementation process then continues with an intensive on-site session by a licensed Dolphin trainer. Then, a specialist is assigned to assist your practice to ensure a seamless transition. Additional follow-up visits are available.

Existing Database Conversion.
We faithfully translate your existing practice data into Dolphin's data platform. This data conversion process includes full patient demographics, referral information, scheduling calendar (past and future appointments are preserved), patient financial data, insurance details and treatment card entries. Most systems under UNIX®, MS-DOS® and Windows® platforms can be converted. Detailed documentation regarding the conversion of your existing system is available.
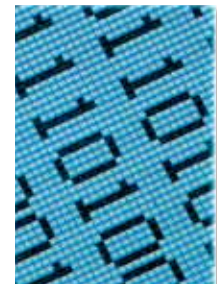
Automatic Software Updates.
Dolphin Management updates are delivered securely and automatically via the Internet (broadband is required), so your office will always be running the latest Dolphin software.

Perfect Companion to Dolphin Imaging and Other Industry Software.
Dolphin Management displays the patient's image throughout the program. You can also directly access the full set of the patient's photographic images, radiographs and cephalometric analyses (optional feature). Dolphin Management also supports integration with industry-standard programs and services such as T.LINK™, OrthoSesame™, Tele-A-Patient™, HouseCalls™, OrthoBanc, SureSmile®, Vanco, ZACC, Emdeon Insurance Claims and Electronic Statements, and X-Charge™, completing and connecting all your records and technology solutions.

Service and Support.

We've built our reputation by offering the most responsive service and support in the profession. From a technical support issue to routine administrative questions, our experts will take care of you. We know our products and understand your needs. Our support is available 7 days a week, 24 hours a day via a variety of technologies, including Live Chat; online Webinar Archive and FAQs; email; and phone. We also offer a Live Webinar Series.

*Office hours: 5:00 a.m. to 6:00 p.m. Pacific Time, Monday - Friday; emergency number available all other hours.

Before a Patient Visit...

Fingerprint Security.

Dolphin integrates the latest fingerprint biometric technology throughout the system, allowing designated personnel to conveniently and securely access your practice's most sensitive information and functions. Control functions such as patient account creation, financial modification or appointment scheduling. Operations performed are securely and automatically logged to allow review and examination.You can also optionally enable fingerprint security for employee clock in/out, system sign-on, appointment scheduling, financial and treatment card functions.

Employee Time Clock.

A completely integrated employee sign-in/sign-out module that tracks employee working hours. Specialized "customized events" track time spent on specific employees activities, including "Out of office – Making bank deposit," "Moved from chair-side to front desk," and "Began working in lab," etc.

Patient Database.

Complete patient demographic data is stored and organized, including detailed personal information, special keywords, unlimited billing parties, employee information, complex insurance plans, flexible contracts and payment plans, appointment history, referral tracking and treatment card entries. Easily create custom database fields for items like school/camp information.

Scheduling.

Patient appointments are easily managed with custom time increments (2-minute to 60-minute), unlimited chairs/columns and unlimited office locations. You can also design schedule templates for each day and location, featuring color-coded appointment types, doctor time tracking, printing of appointment tickets and school excuses, as well as week-at-a-glance views. Scheduling also supports drag-and-drop flexibility!
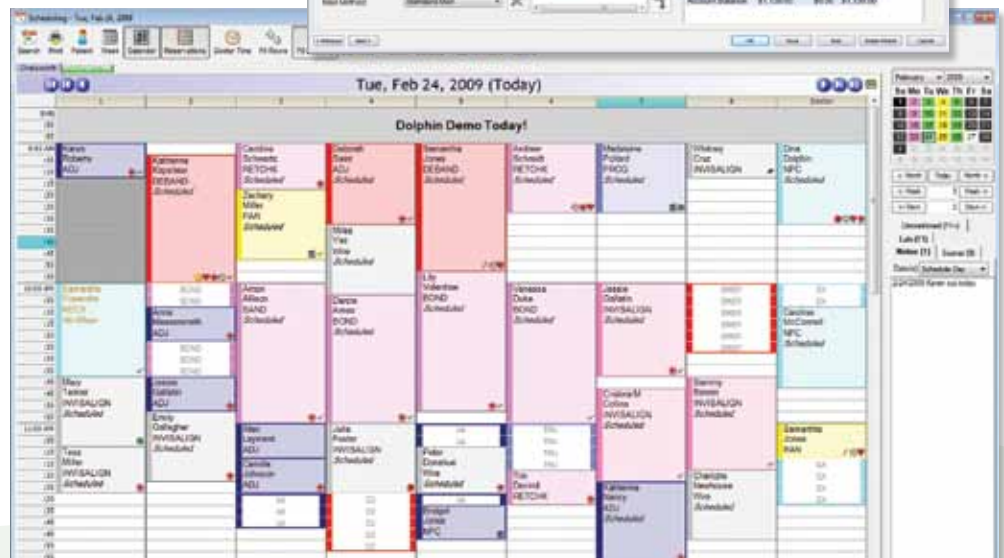
Sooner if Possible.

"Sooner of Possible" function alerts you to appointments hoping for an earlier time slot, displaying them in a list that is searchable and sortable by any criteria. A "Search and Reschedule" option automatically loads all relevant data for the appointment being rescheduled. Also, select any open Reservation and quickly find "Sooner if Possible" appointments to fill the available time slot.

Schedule Search.

Easily search your schedule for procedures based on doctor time, location, day of the week, morning/afternoons. The search results are automatically sorted by day and color coded to low, medium and high patient loads.

Appointment Reminders (SMS/Email/Telephone).

Now you can easily send appointment reminders to your patients via email or SMS, or deliver reminders personally with Phone Reminders. Define a preferred Appointment Reminder Method for each patient. You can also customize the message to be sent for each reminder type using specific tokens on this screen.
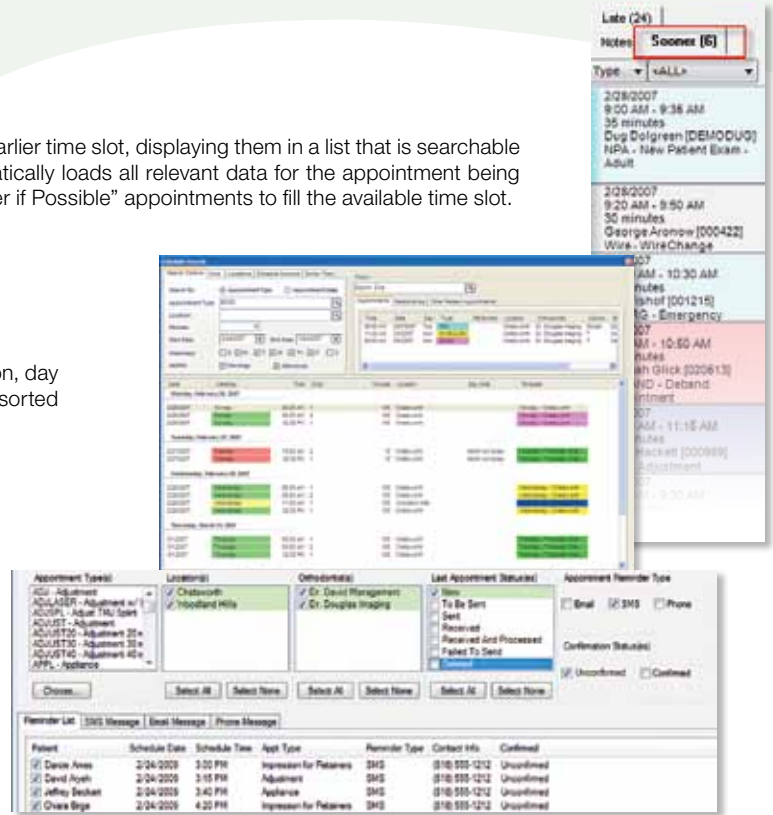
During a Patient Visit...

Patient Check-in.

Greet your patients with personalized PowerPoint® messages, using images, animation and graphics. Patients have the option of signing in by fingerprint scan or by typing in their names.

Patient GPS™.

This unique feature allows you to accurately monitor patient flow in the office, including which and how many patients are scheduled, have signed in, are waiting, have been seated and have completed their appointment. Early and late arrival of patients is automatically indicated, while waiting times, reminders and time spent on procedures are accurately tracked. This is one great tool for improving office efficiency and productivity on a daily basis.

Electronic Signature.

Take one step further toward a paperless practice! Capture signatures on the fly in real time, or save captured signatures to your Dolphin program for easy, on-the-spot retrieval by any staff member with rights. Dolphin Management supports the Topaz Systems SignatureGem LCD line model family T-L462.

Image courtesy of Interlink

Operatory Light Bar.

A powerful tool for managing and optimizing operatory flow in a busy practice. The Operatory Light Bar precisely locates any patient, doctor or staff member and displays the location of the patient, their treatment status, where the doctor is and should be going, and which staff person is performing what specific procedures.

Treatment Card.

Efficiently and securely record detailed treatment visit activities and treatment plans. Features include touch-screen and Microsoft® XP Tablet PC compatibility, customized color cards for different treatment type/stages, multiple treatment card layouts, quick selection of commonly used phrases for text fields, personalized band/elastic sizes, photographic and radiographic images (when used with Dolphin Imaging™), quick email and integrated scheduling. Quickly graph any column in Treatment Card, such as Oral Hygiene or Cooperation. Easily schedule multiple next-appointments directly from the Treatment Card.

Enhanced Customized Tooth Chart.

Graphically enter items like bracket type with torque information, arch wire sizes, elastics, powerchains, TADs and annotations in the Enhanced Tooth Chart. Of course, it is customizable by the practice.

Treatment Planning Documentation.

Customize individual treatment plans for your patients. Pick from predefined global treatment plans, or build a new plan for each patient. Treatment Plans include sequencing, number of visits, procedures, months between visits, internal visit notes, etc. Easily view treatment plans from the patient's treatment card. Plan progress is displayed in Treatment Card, allowing you to quickly and monitor the course of each patient's treatment.

Document Organizer.

Combines virtually all communications for your practice into one secure electronic file cabinet. Letters, emails, faxes, notes and forms can all be directly accessed from multiple locations, including associated patient, billing party, referral and insurance company records.

# After a Patient Visit...

Exam Questionnaire.

Customizable forms allow you to prepare comprehensive multiple-choice surveys for use during initial-, progress- and post-treatment patient exams. Layouts can be personalized to reflect individual preferences. Easily select with integrated Tooth Picker.

Super Questionnaire.

Works across Dolphin Imaging, Dolphin Management, AnywhereDolphin and Dolphin Mobile. Features a distinct interface for staff and patient, so questionnaires and forms can be shared with patients via AnywhereDolphin.com; you can then access with Dolphin Mobile on your iPad. Data is securely stored in your Dolphin database, and accessible via Dolphin Letters, Patient Information, Patient Document History, Treatment Card, and other relevant screens within Dolphin.

Exam Questionnaire integration with PowerPoint.

Easily build patient-customized PowerPoint Presentations based on the information entered in your Exam Questionnaires.

Diagnosis and Treatment Planning
For
Jessica Doleski
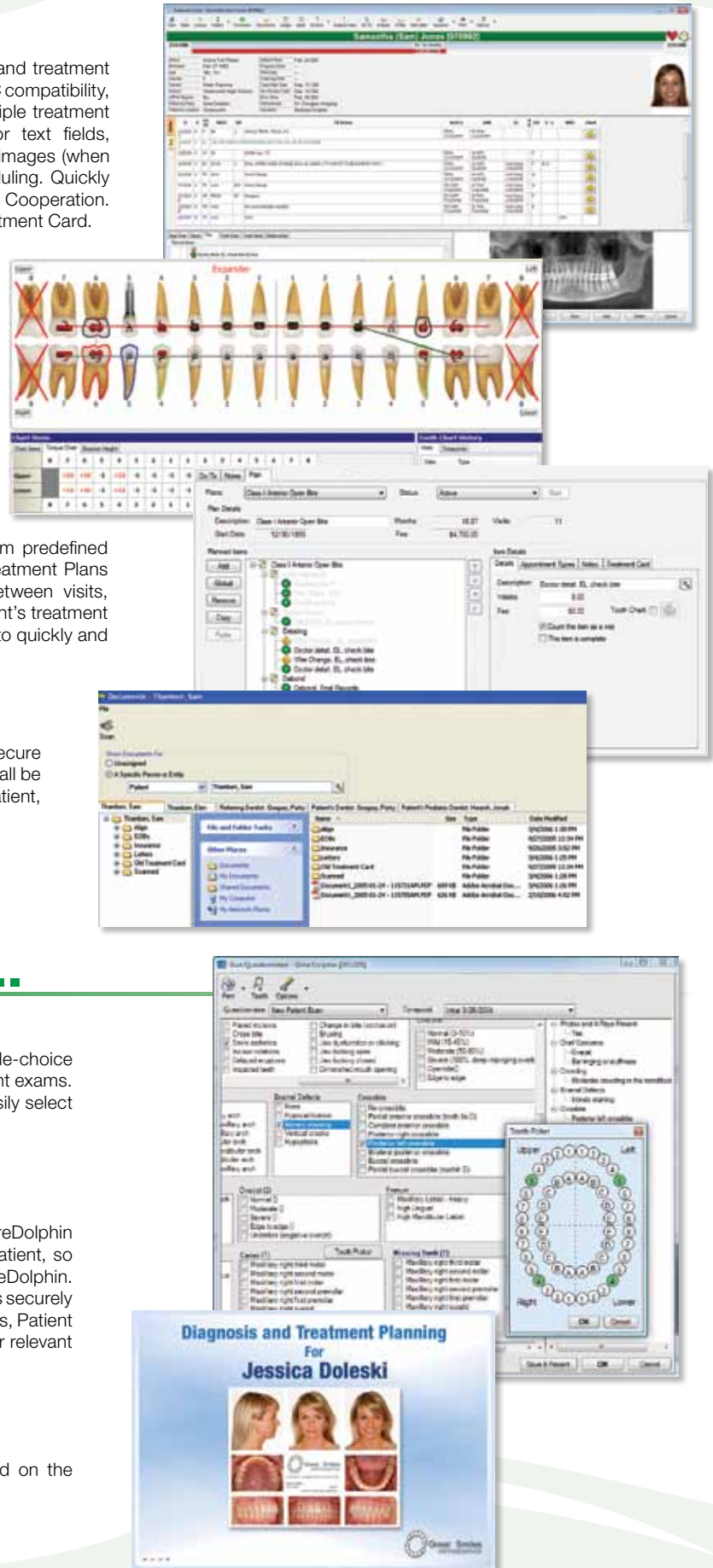
Relationship Manager.
Easily link and display all patients, doctors, non-patients and employee relationships for a patient. Relationships can be set for patients, billing parties, professionals and employees. Create relationship groups for related parties. For example, create ABC Dental Group and link all doctors that work at ABC Dental Group.

Active Full Phase	36
Active Phase 1 Treatment	10
Active Phase 2 Treatment	10
Exam Appointment Performed	1
Exam Appointment Scheduled	6
Inactive	3
Invisalign	19
Limited Treatment	2
New Patient Added	1
New Patient Exam Cancelled	1
Observation	17
One Arch Treatment	1
Retention	37
Transfer Out	1
Totals:	157

Patient Tracking.
Analyze detailed patient statistics based on treatment stages from initial contact and first scheduled appointment to completion of treatment. Review and track history by procedure, appointments, and letters. Answer questions such as, "Who has had records taken, but has not yet started treatment?"

Correspondence.
Integrated with Microsoft Word® and the Dolphin Letter System, you can utilize powerful custom letter templates to address patients, billing parties, referrals, professionals, etc. Letters can be automatically queued from different operations: scheduling, treatment card, patient status changes, etc. Choose from a comprehensive library of letters, certificates, postcards, labels and reports.

Comprehensive Financials.
Solidly designed, field-proven features: Charge/payment processing, collection tools, complex contracts, precise adjustments, family statements and balancing work sheets. Insightful financial reports that help discover inappropriate financial activity. Complete and accurate end-of-day and end-of-month reporting. Integrates with credit management and accounts receivable services, including Emdeon Express Bill Electronic Statements, OrthoBanc®, and VANCO® Services. Integrates with X-Charge for automatic credit card processing.

Insurance.
Complete tracking and management of insurance activities. You can submit claims based on expected benefits, easily make adjustments, reconcile and track balances. It supports employer/individual plans, batch/individual forms, printed and electronic claims processed through Emdeon.

Archived Financial Reports.
Dolphin Management automatically archives in PDF format all standard end-of-day and end-of-months reports. Easily and securely access prior period financial reports. All financial reports are serialized for your protection.

Referral Analysis.

Flexible, powerful tools help you extract valuable information relating to patient referral sources based on patients, practitioners and billing parties. Create detailed reports and graphs based on charges, contracts and treatment types. Answer questions such as, "Who referred the most patients to us last year?"
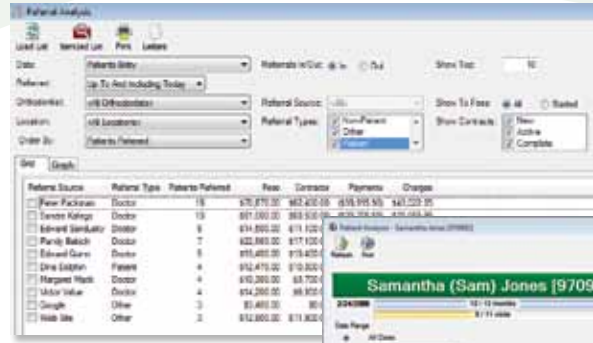
Patient Analysis.

Accessed in the patient's Treatment Card, this feature displays key patient treatment information such as Visit Entry Count; Emergency Entry Count; Scheduled Appointment Count; No Show Appointment Count; Cancelled By Practice Count; Cancelled by Patient Count; Late Appointment Count; Patients Referred In; Progress Date; Deband Date; Total Scheduled Hours; and Total Actual Hours
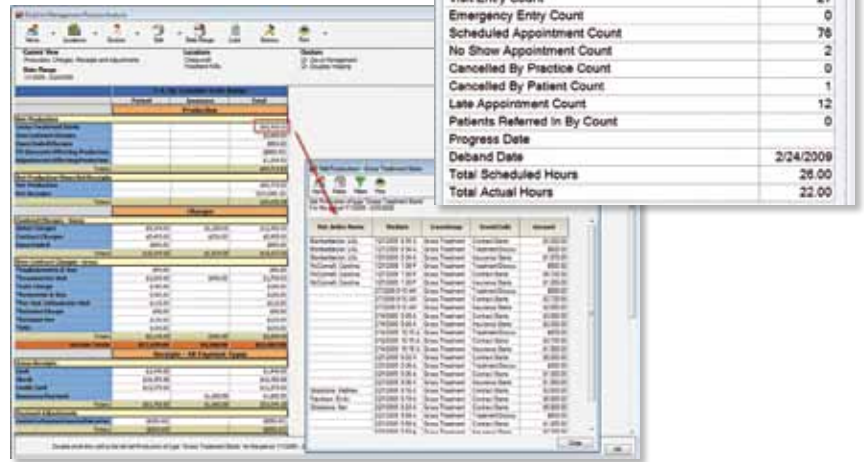
Practice Analysis.

This powerful and interactive feature provides vital practice statistics: treatment starts, production, charges, receipts, adjustments, status changes, new-patient-added and accounts receivable. Easily drill down from a summary view to itemized transactions of individual accounts.

Light Bar and GPS Analysis Tool.

The new LightBar Analysis calculates the amount of time a patient was in each LightBar status for appointments in a given date range. The GPS Analysis calculates the amount of time a patient was in each GPS Status in a given date range. Filtering and grouping functions allow customized micro-analysis, plus LightBar Analysis includes a nifty Exclude Late Appts option which, when selected, will exclude from results those appointments that were late by the specified number of minutes. The GPS Analysis includes both an Exclude Early and Late Appts option.
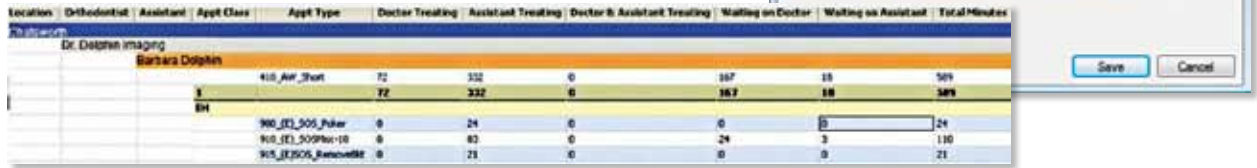
Doctor Time Analysis.

This new screen displays Planned Doctor vs. Average Doctor Time, broken down by Appointment Class or Type. You can search by Appointment Type, Class, Orthodontist and Location. Information is displayed in Scheduling Time Increments, and handy drill-down access takes you to the Appointment Detail

Schedule Statistics.

Display key schedule counts using with filtering by Date Range, Location, or Orthodontist. Group by Date, Location, Orthodontist, Appt Type or Class. Display counts by category such as Scheduled, Add Ins, No Show, Cancelled, Rescheduled, Dismissed, Unknown, Entered on Day, Cancelled on Day, Rescheduled on Day, Rescheduled To Day.

Dolphin Management 5 product features

Standard Reports.
Choose from a list of more than 80 predefined reports on financials, patient information, scheduling, treatment card and labels. Examples include end-of-day, receipts, transactions, production and practice summaries.

Dolphin Interactive Report Tool.
The same way Practice Analysis helps you view your practice, Interactive Report Tool collates all report data in a friendly grid format that you can manipulate onscreen. Select from over 500 data fields to create your own custom searches and reports. Add filters, rearrange the columns, or change the order of the fields to create a whole new view of your data! Quickly drill down to individual patient information (it is interactive!). Easily send letters, print labels or print the new customized information.

Comprehensive Doctor Database.
A comprehensive doctor database allows you to track doctor; staff; contact history; referral history; and even link to their Facebook, Twitter and LinkedIn Pages!
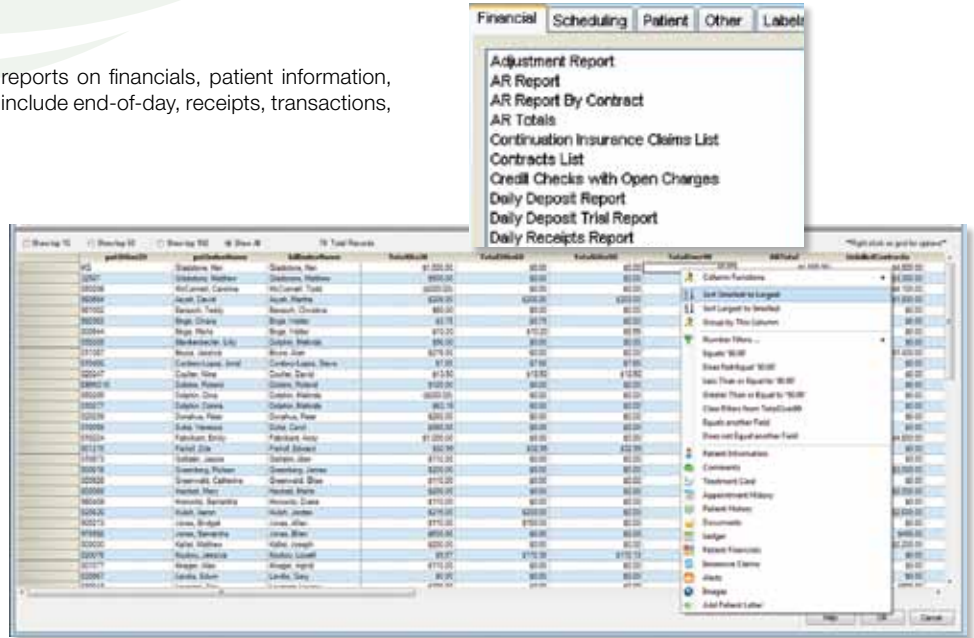
Legend Series

Ms. Charlene White

Charlene White's SOS, Systematic Office Solutions

The Charlene White's SOS includes a statistical monitoring system that quickly compares your practice numbers to Charlene's benchmarks. Also, effective scripting for your is a keystroke away, along with scheduling templates perfect for any sized practice, and a guide to implementing an effective recall system. A companion 60-minute DVD is part of this module.

Dr. Ron Roncone

Roncone Modules

The Dolphin Roncone Modules integrate seamlessly with Dolphin Management to optimize your daily practice workflow. Powerful tools include Dr. Roncone's signature Practice Monitor, Doctor Time scheduling, Procedure Timings Report, exam questionnaire and letters, presentation templates, treatment card templates and a comprehensive Diagnostic Check List.

Mr. Paul Zuelke

Zuelke Financial Expert

The Zuelke Financial Expert was designed specifically for the Dolphin Management system and is a useful add-on module for every Dolphin practice. This module helps you efficiently manage financial delinquencies, account collection, financial situations requiring review, and other related tasks to allow a greater insight to your practice performance and statistics.

Minimum Server and Workstation Requirements

Server:
Windows XP Professional/Vista Business (for 5 concurrent users or less) or Windows Server 2003 or higher, Microsoft SQL Server 2005 or higher, 30 GB space available.

Workstation:
Windows XP Pro or Vista Business P4 1.3 Ghz or higher. 1 GB of RAM.

Visit www.dolphinimagin.com for detailed Minimum Requirement Specifications.

800.548.7241 +1.818.435.1368   info@dolphinimaging.com   www.dolphinimaging.com

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