TRACKER Intelligent Software

www.gotracker.com

INSIDE TRACK

TRACKER NEWSLETTER | FALL 2022 | VOLUME 28

Fall IS JUST Around THE Corner

As everyone knows, while COVID will be with us for a long time, the concern over the spread has subsided and things are getting back to normal. Most of our staff that was working from home has returned to the office, and most offices are also back to normal. Summer is also just about over and while everyone has been enjoying the warm weather, we at Tracker have been hard at work with a bunch of new announcements.

Over the last year, we've seen more new offices joining the Tracker family than ever before. We thank everyone for their patronage and all the great recommendations and positive reviews we've been getting. With the increase in the number of Tracker users, we have brought on additional support staff and trainers, so you might hear some new voices on the phone.

For the few offices still using Tracker 10, the addition of new support staff and trainers increased the urgency for you to upgrade to Tracker 11. Our new staff are not trained on the older version of Tracker and supporting Tracker 10 is becoming more difficult. We have been scaling back support for Tracker 10 for over a year now and this will be continuing over the next few months, with a view to dropping all support by the end of the year. If you haven't moved off Tracker 10 yet, now is the time.

One of the benefits or Tracker 11 is access to our eServices. With the introduction of our COVID Forms and the Virtual Waiting Room, most Tracker offices have adopted eServices in their office and the reviews have been amazing! If you're not on eServices yet, ask us about how they can improve your productivity, reduce costs in your office and improve your service to your patients.

Finally, for this edition, we are trying a new question/answer format. How do you like it? Let us know.

You Have Questions! **We've Got Answers!**

Dear Tracker…

Anyone remember "Dear Abby"? Well, here is Dear Tracker…

This newsletter is devoted to questions we've received from offices in the past, as well as the answers we've provided.

We like to ensure all our offices are benefitting and using Tracker to its fullest potential. That said, here are some topics you might find interesting, along with lots of How-To explanations.

Why is Everyone Talking about **Contactless Payments?**

DEAR TRACKER

I keep hearing that offices, now more than ever, are moving to contactless payments. We want to keep up with technology but not sure why we would need to implement this in our office? What's the benefit? If it ain't broke, why fix it?

– Need an Education on Contactless Payments

DEAR NEED AN EDUCATION

We get asked about contactless payments a lot. There is no right or wrong answer—every office has to do what's right for them, however, we'd be glad to share some facts:

Contactless payments isn't new technology, but seems to be even more popular since COVID, as it's a great solution for enabling a germ-free, touchless environment. Many practices have adopted this form of payment to keep up with the demands of their patients.

Additionally, giving your patients the convenience they expect when paying helps your practice get paid quicker, take deposits for cases of no-shows, and decrease your time collecting money.

All in all, it's a "win-win" for your practice + your patients.

Not sure if you know this, but we ran a webinar on this exact topic! In case you missed it, you can watch it by clicking on the following link:

Webinar: Simplify Payments with a secure, integrated solution

If you have questions and/or want more info, feel free to give us a shout!

Trying to See Payments on my Bank Deposit

DEAR TRACKER

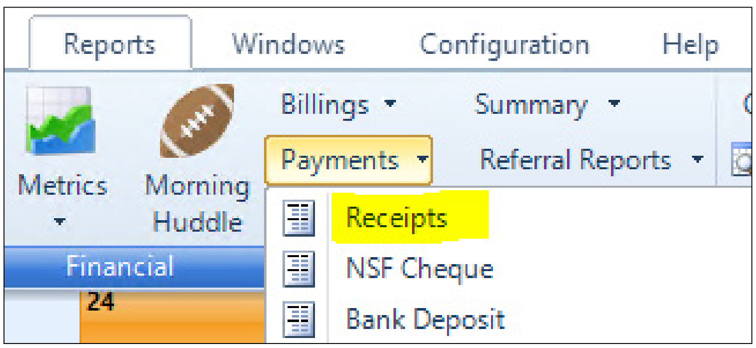
I am searching but still can't see payments on my bank deposit?

– *Trying to See Payments*

DEAR TRYING TO SEE PAYMENTS

The reason you're not seeing them is because the payment has been marked as deposited.

It's important to note, that the deposit report is not a proper financial report and that items can be removed and excluded from it. It is a checklist of what you need to physically take with you to the bank.



If you're looking for a full financial report of payments, then go to Reports ❯ Payments ❯ Receipts. For the Cash Receipts by payment method, this will show you all payment in a given period of time.

Reduce # of Mouse Clicks

DEAR TRACKER

Every day it seems like all I'm doing is clicking my mouse all day long. Why do I have to do so many mouse clicks in Tracker? Is there a way to reduce this?

– *Tired of Clicking So Much*

DEAR TIRED OF CLICKING

The way to reduce the number of clicks is to "right-click" with your mouse. Try this on your schedule, invoices, ledger, chart, treatment plan, images and many more. You will find yourself left-clicking A LOT less.

Get it now!

Tracker 11.30 is ready for you. Upgrade, upgrade, upgrade!

DEAR TRACKER

Everyone's talking about Tracker 11.30 and I have no clue what new features there are, but I'm thinking since everyone has it and is loving it, then I should get it too, right? Can you tell me about some of the new features?

– *Severe Tracker 11 Fomo*

DEAR TRACKER 11 FOMO

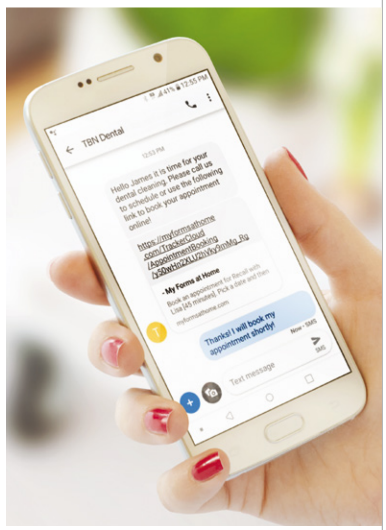
No need to have FOMO! Everyone knows FOMO means fear of missing out! No need to feel this way, because you can get upgraded to Tracker 11.30 too!

Some of the new features include *flashing appointments when patients check in, more easily identifiable family appointments, non-binary gender options, automatic naming of treatment plan phases*, and more. One of the most exciting new features is the ability to *incorporate treatment plan details in letters*, allowing for a highly professional presentation. See the detailed highlights document with videos by clicking on Help, then clicking on 'Recent Updates' within Tracker.

If you're interested in 11.30, then contact us and arrange for your free upgrade. Whaddya waiting for? We're waiting to tell you all about 11.30.

Electronic Patient Communciation

"ALL IN ONE" software… no need for any other.



DEAR TRACKER

In addition to Tracker, we are using another software for our electronic patient communication. A colleague of mine questioned why I was using a third party vendor when Tracker can do it all. I honestly could not answer that question. I see you offer eServices, so can you explain to me why I was told that I need to use another software when Tracker offers these electronic features too?

– Confused and Trying to Understand

DEAR CONFUSED

You are correct in questioning why you need yet another software. To be honest, there is really no need! Tracker eServices offers a variety of electronic patient communication.

Here is short explanation about each of them:

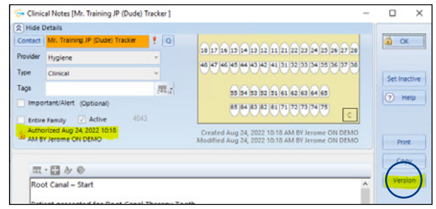
eBooking: allows patients to go online and book their own appointments, while you remain in full control over available times offered.
eMessage: allows you to text and/or email patients directly to their cell phones from Tracker.
eForms: enabling patients to fill out their forms electronically in advance (ie: COVID pre-screening forms).
eConfirm: allows you to communicate electronically by sending automated email/text confirmations for patients appointments. No more phone tag!
ePhone (aka: Caller ID): when a call is received, a pop-up will appear with the phone number and name of patient, and will also pull up the patient profile on your screen.
eReviews: enables you to drive positive, online 5 Star eReviews, by allowing your existing, most satisfied patients to post reviews.

There is no need to worry about sharing your data with yet another supplier, when Tracker has automated patient communication.

By using a third party vendor, you are also sharing your database with yet another supplier. You might want to re-think this and have only one software that does it all. Makes it easier on you and I bet your staff will thank you.

Call or email us to find out about pricing & features. This way you can make an educated decision about what is right for your practice (and maybe even save some $$).

Editing a Locked Note 101



DEAR TRACKER

In our training, we learned how to edit a locked note. I remember thinking, "this is great & can't wait to try this", however, now I'm trying to edit one and it's not working.

– Challenged Sometimes

DEAR CHALLENGED

Yes, you can easily edit a locked note. Open the note, click the VERSION button on the right, then make your changes. This will create a new version of the note, you have the choice to make the original inactive or you may keep it active—you can decide. Now go ahead and edit!

Help Needed… Trying to Send Claims

DEAR TRACKER

I'm not having a good day. I keep getting a message saying "software not running" when trying to send claims. Am I doing something wrong? I am not sure what to do!

– Trying to Send Claims and Need Help

DEAR TRYING TO

This message means the EDI software, being either iTrans or CCDWS, is not running on the computer that your practice has indicated as the EDI machine. Please ensure the program is running by clicking on the desktop shortcut. This should solve your problem.

The Quickest Way to **Search for a Hygiene Opening**

DEAR TRACKER

Always looking for ways to be more efficient and was curious to know what is the quickest way to search for a hygiene opening with the next available hygienist?

– Curious to Know

DEAR CURIOUS TO KNOW

Good you want to be more efficient and you came to the right place to ask. When you are in the appointment edit screen, click on the search button. This will help provide you with a list of openings with the provider that is linked to the appointment. To quickly search for **all** available openings with **any** of your hygienists, you can use the *schedule column group feature* (please note, you will have to have this feature set up before you can use it*). The advantage of this feature is that with one click, it checks off each hygienist instead of having to click on each individual hygiene provider. The advantage of using this feature is that it speeds up the process of finding an opening. You can also add a *schedule column group* for dentists, which quickly searches for the next available opening with **any** of your dentists.

**To set up the schedule column group go to configurations, schedule columns. At the bottom of the box, there is an "add and delete" button. Click on the Add button and type hygiene and then hit ok. Then, on each of your listed hygienists, tick the hygiene box in the schedule column group and then click apply. You can also do the same for dentists. Click add and type dentist and then hit ok. Then on each of your dentists columns, check off the dentist in the schedule column box and apply. Got it?*

You Can Increase Font Size

DEAR TRACKER

I used to have 20/20 vision, but now my eyes aren't as good as they once were. I need to make the font bigger in Tracker, is this possible?

– Bad Eyes Can't See Teeny Tiny Font

DEAR BAD EYES

Yes, it's possible! To make the font bigger, simply click on Configuration/Tracker Options and go to the appearance tab. At the bottom, you can change both the font and size for All Fonts, Schedule Font and Grid Font. The default is 8, so please try 9 or 10 and see if it looks better. Your eyes will thank you.

I'm Chartless and have an Invoice Question

DEAR TRACKER

My office is finally CHARTLESS and wondering if there is a way to enter invoices from right clicking on invoices? I noticed that when I do this, it does not appear in the clinical charting. Any ideas how I can fix this?

– Hip Hip Hooray For Chartless

DEAR HIP HIP HOORAY

Great question and a simple fix! First, you should NOT be entering invoices from the 'front' of Tracker if you are chartless. However, if you have done this (by accident), then you'll need to follow these steps:

Right click on the appointment >>
Select **Treatment Plan**, click **New Estimate** >>
Enter the codes >>
Click **Complete Phase** button.

Hip Hip Hooray, hope this explanation makes sense.

Fast & Easy Way to **Find an Appointment Date**

DEAR TRACKER

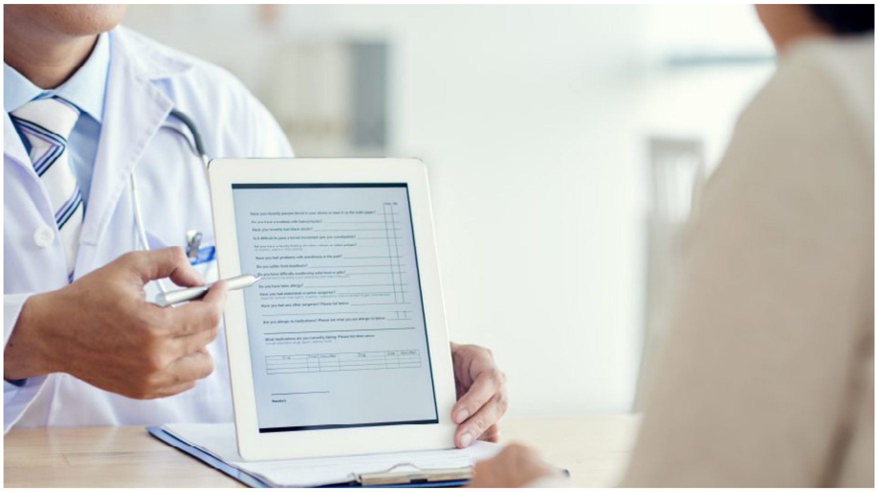
I hate having to click through the calendar to find an appointment date. Is there any way to make this process faster and easier?

– Hate Clicking

DEAR HATE CLICKING

Yes, you're in luck, there is a faster and easier way to do this. When you have an appointment open, use the Search function located down the right side tool bar. Set the patients availability parameters, make sure the correct schedule column and appointment duration are set, then click search. You will get a list of available times and dates and the schedule behind the appointment will move to the selected day so you can see what else is happening on that day. Once the date is chosen, simply double click to book the appointment.

Loving eForms More than I ever Imagined I Would



DEAR TRACKER

I am a recent new hire and worked at another practice where a different software was being used. I thought the software was good (won't mention which it was), until I started using Tracker. omg!!! I LOVE Tracker and all its amazing capabilities, but the feature that is truly my all-time favourite is eFORMS. Just saying, it's the BEST and just wanted to share this with you.

– *Loving eForms a Lot*

DEAR LOVING eFORMS

We are happy that you're loving this feature. Since COVID, most of our offices are now using eForms and clearly see the benefit being able to fully customize their own online forms. Asking patients to complete and submit their forms in advance (from anywhere/anytime), has truly been a game changer for many offices.
We have heard how time-saving and efficient they are and offices tell us they're not sure how they ever worked without electronic forms. So happy you love them. Thanks for sharing! We love to hear from happy clients!

Need Help **Adding New Provider**

DEAR TRACKER

Not sure if you will be able to answer me, however, can you tell me how to add a new provider to the Prescription Form?

– *Need New Provider Added*

DEAR NEED NEW PROVIDER

Of course we can answer you AND will even give you step-by-step instructions for how to add a new provider.

- Go to Configuration > Form Templates;
- Find the prescription form template in the list and click Edit;
- From edit/design view, find the question asking about the provider, click the right-facing arrow in the Options column;
- Use the + button to add a new line to the list of possible providers;
- Type the name of the new Provider and their unique number, if applicable;
- Use the blue up and down arrows if you need to re-order the list of providers;
- Click OK to close the answer list when done;
- Click OK to close the edit/design window for the form template. Save your changes.

That's it!

Digital Forms can be stored on your computer

DEAR TRACKER

During my training, I recall learning about TWord and the capability of having forms and questionnaires stored on my computer. I know Tracker can do this, but for the life of me, I can't remember how?

– *Need Digital Forms*

DEAR NEED DIGITAL FORMS

Yes, you are correct. With the use of a scanner and the TWord add-in, you can have forms and/or questionnaires stored on your computer just as you would scan and save any other document or picture. You can easily store and view them with the simple click of a button.

By creating a new template in TWord, the documents that were scanned can be added and saved, giving you a digital copy of your form, which can be easily accessed through your patient info!

For a step-by-step walkthrough on how to create a template and add the images, be sure to visit our website.

I signed up to be a Become a Tracker Member and I'm **Loving the Training Library**

It's free and gives you access to lots of training material

DEAR TRACKER

I recently signed up to be a Tracker Member. I was told that by doing so, I would be granted access to your Training library. I signed up and have been patiently waiting; however, still not able to access the many tutorials you have available. Help plz!

– *Request for Tutorials*

DEAR REQUEST FOR TUTORIALS

It's great that you registered! It's true, when you sign up to **Become a Tracker Member**, you and your staff will have access to our Training Library, filled with many training tutorials, lots of recorded webinars, including a variety of How-To videos, plus much more.

Sometimes, when a client tells us they're having trouble getting their account activated, it's usually because their email address is incorrect. To avoid any issues accessing our library, make sure when registering, that you provide us with your valid email address.

If you know someone that is not yet a member but would benefit from our tutorials, please feel free to share the following registration link with them: **Become a Tracker Member**.

Please note—to access our training library, you must be a Tracker client AND you must sign up!

Woohoo! Custom field can be displayed on schedule

DEAR TRACKER

I probably should know the answer to this question, but is it possible to get a custom field to show on the schedule?

– *Wishing for a Custom Field*

DEAR WISHING FOR

Your wish is our command. If you are not using it for something else, the Chart Number field can be displayed on the day sheet. Click on Configuration | Tracker Options and go to the Scheduling tab and check Display Chart Number, which is near the top. *Wishes do come true.*

We Need Your Input. Want more info on a certain topic?

We're always looking for topic suggestions for Webinars, Group Training Sessions, Private Trainings (either onsite or online).

Tell us what you want to learn about:

Click here to LET US KNOW

Check Out our BLOG for New and Informative Information

We have lots to tell you!!

Visit our blog and check out the variety of topics written by a variety of people, all looking to share interesting and informative information.

Click here to VISIT OUR BLOG POSTS

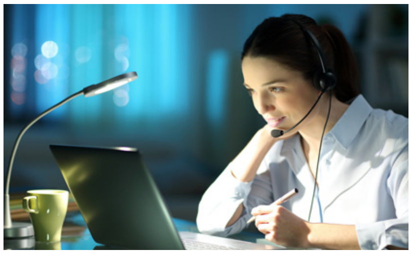
What? Still calling us to pay your invoice?

Contact us today and set up authorized payments!

You have payment options! You may still call us to pay your invoice by either Visa or Mastercard. However, you can make things even easier, and save time, by setting up pre-authorized debit payments for your practice.

Contact us and we'll be glad to set this up for you.

SOS… We're Available After Hours



Hey, did you know we're available after hours?
Our "After Hours Tech Support Team" are available outside regular office hours and will ***gladly*** help you in case of an emergency! Simply leave us a message and someone will get back to you asap!

When leaving a message, please make sure to clearly state the following:

- the name of your practice
- your name
- your phone number
- reason for your call

This will enable us to pull up your file and be ready to help you.

Hey, Tracker 10 users… Get Your Free Upgrade!

Still on Tracker 10? You should get upgraded to Tracker 11 now, and here's why…

We're phasing out support for Tracker 10, so please get upgraded to Tracker 11 asap!

Now is the Time to get your FREE* upgrade & EXPERIENCE the POWER of Tracker 11.

How does this affect my office?
Since there will no longer be support for Tracker 10, we suggest you upgrade to Tracker 11 asap.

How do I upgrade to Tracker 11?
Contact our office and we will be happy to discuss the required next steps.

What if I don't upgrade to Tracker 11?
You will still be able to run Tracker 10, however we will be phasing out support over the coming months.

Will I have time to upgrade to Tracker 11 before Tracker 10 support is retired?
Yes, contact our office and we will be happy to discuss the required next steps with you to ensure you have continued support.

Contact us and get upgraded now.

A Big Thank You!

Referrals are always welcome.

We want to take this opportunity to THANK all of you that continue to refer our Tracker software to other offices and to your colleagues. We so appreciate you doing this for us. After being in business for almost 30 years, we have relied predominantly on word-of-mouth and are extremely happy and grateful for each new client that joins our Tracker family.

Please continue to refer us… and don't be shy, make sure to let us know that you referred us and to whom. This way, we can thank you!

Sign up and Partake in our monthly **Complimentary Webinars**

Each month we offer a FREE, one (1) hour, informative webinar that cover topics that have been specifically requested by YOU, *our* clients.

We share information you've asked to learn about and at the end of each session, there is time for Q&A's. These sessions are very popular and fill up quickly. Everyone benefits from learning something new!

THERE ARE TWO WAYS TO REGISTER

1) Webinar evite (via email) will be sent to your office with registration link
OR
2) Open up Tracker and click on registration link found in associated webinar banner

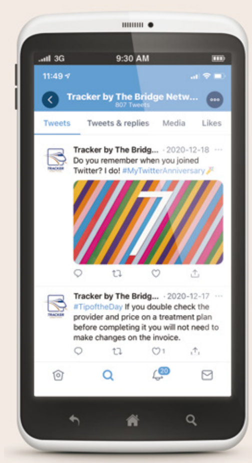
Not getting our evites at your office? Contact us to make sure your email address we have on file is correct.

Whether you're available to attend the session or not, we suggest that you register anyways. If you can't make it, we will send you the recorded session to watch at your convenience.

Check out our upcoming webinars: Tracker Webinars

Stay in the Know via our regular "Did You Know?" emails

To learn about upcoming events, tips & tricks, as well as important information, we often communicate through email, so be sure to check your inbox on a regular basis.



Our "did you know?" email series is packed with information that we think you might find interesting and things we want you to "KNOW" about.

Be sure to share our "did you know" emails, by forwarding them to your co-workers too.

Follow us on Facebook, Instagram, Linkedin and Twitter, as we will often share information on these various platforms as well.

Let's Get Social

Click the icons below to access…

Not yet a Tracker Member? Sign up for access to our training library… **It's FREE!**

By signing up to **Become a Tracker Member**, you and your staff will have access to our Training Library, filled with many training tutorials, lots of recorded webinars, a variety of How-To videos, plus much more.

Only available for **Tracker Members!**

Click on following link to sign up:
http://gotracker.com/membership-login/

**Please note - to access training library, you must sign up.*

Jerome's Been Busy Tweeting!

Be sure to follow Tracker on Twitter and check out Jerome's informative and sometimes very comical **#TipoftheDay.**

Click here and Follow: TRACKER TWITTER

INSIDE TRACK

TRACKER
1110 Finch Ave West, Suite 600,
Toronto, ON M3J 2T2
Call us at **1-800-922-7434**
Email us at info@gotracker.com

Want to learn more about eServices?
Find out what & why you need them now:
http://gotracker.com/eservices-video/
Schedule your free demo today:
http://gotracker.com/eservices-demo/