

NEW FEATURES AVAILABLE IN IN Vi4

==== BUILD 4006== Vi3/PB12 =====

ENHANCEMENT: Improvement of Confirmation and Cancellation messages (SMS and Email)

An enhancement has been made to the default Confirmation and Cancellation SMS/Email messages sent to patients that book eAppointments.

The new default Confirmation SMS/Email will be:

- i. When Telephone field (Phone 1) is populated in Location Setup in D4W/PSS:
Hi **Firstname**, your appointment with **Provider title Provider firstname Provider surname** at **Location name** is scheduled for **eAppointment Day eAppointment date/time** (TEL: **Location phone**).
- ii. When Telephone field is NOT populated in Location Setup in D4W/PSS:
Hi **Firstname**, your appointment with **Provider title Provider firstname Provider surname** at **Location name** is scheduled for **eAppointment Day eAppointment date/time**.

The new default Cancellation SMS/Email will be:

- i. When Telephone field (Phone 1) is populated in Location Setup in D4W/PSS:
Hi **Firstname**, sorry, the appointment slot you requested on **eAppointment Day eAppointment date/time** with **Provider title Provider firstname Provider surname** is no longer available. Please select another time slot or call **Location name** on **Location phone**.
- ii. When Telephone field is NOT populated in Location Setup in D4W/PSS:
Hi **Firstname**, sorry, the appointment slot you requested on **eAppointment Day eAppointment date/time** with **Provider title Provider firstname Provider surname** is no longer available. Please select another time slot.

The above will apply to sites that have not created a Confirmation/Cancellation eAppointment template in the Mail Merge Setup tab of D4W/PSS.

The field 'eAppointment day' will have the following possible values: Mon, Tue, Wed, Thu, Fri, Sat, or Sun.

Creating a Confirmation/Cancellation eAppointment template in D4W/PSS

1. Go to the menu option 'Debts/Market' and select the tab 'Mail Merge Setup'.
2. Select the option 'eAppointments' from the drop down menu.
3. Select 'Cancellation' or 'Confirmation', and click on the 'SMS template' edit button.



4. Type the desired text.
5. Click on the option 'Insert' and select 'Fields', to input the patient's name, the eAppointment time and date, etc.

ENHANCEMENT: eServices to D4W/PSS Patient Synchronization rules improvement

- For practice using 'Families' to schedule consecutive & simultaneous appointments for patients of the same family; the Family structure in D4W/PSS (Family head and family members) is not changed, even when eServices family structure is different.
- Only empty D4W/PSS fields are updated when an eServices patient is synchronised.

Family Members and Families in D4W/PSS:

- When members of the one family, in D4W/PSS, decide to create separate accounts in eServices for each family member, the existing family structure in D4W/PSS will remain unchanged.

Previously, when existing members of a family in D4W/PSS decided to create separate accounts in eServices the family would be separated after the synchronization had occurred, so a previous 'family member' would be made a 'family head' causing the family structure to break.

- When a patient (for instance, P1) creates a user for a family member in eServices (using the menu option 'Family Members'),
 - And such patient is new to D4W/PSS,
 - Then, after the synchronization occurs, a new family member will be created in D4W/PPS under the same 'family head' as patient P1.



- When a patient P1 creates a user for a member of their family in eServices (let's call this patient P2), using the menu option 'Family Members',
 - And P2 is an existing 'family head' in D4W/PSS of family F2,
 - Then, after the synchronization occurs, P2 in eServices is matched to P2 in D4W/PSS, and P2 continues being the 'family head' of its own family in D4W/PSS. Therefore, F2 remains unchanged.

Successful patient matching will occur providing that the following fields have an exact match (non-case sensitive) between D4W/PSS and eServices:

- First name
- Last name
- Mobile number

In addition, when an existing D4W/PSS patient creates an account in eServices, and email and DOB are empty in D4W/PSS, and:

- Synchronization and successful matching occurs,
- Then, DOB and email fields, in D4W/PSS, will be populated with information from eServices.

Using 'Family members'

The eServices feature 'Family members', allows users to add members of their family to their eServices account, so that the main user can book eAppointments or fill in eForms on behalf of those family members.

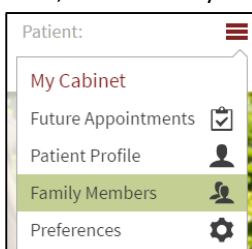
This feature allows dependents or family members who don't have a mobile number to use eAppointments and eForms.

Adding a family member in eServices:

1. The patient must sign into their eServices account.
2. They must click on the main menu on the top right of the screen.



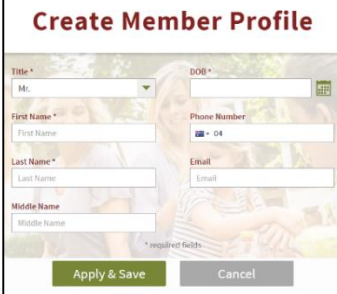
3. Then, select 'Family members'.



4. Then, click on 'Add a new member'.

Add new Member

- And complete the required information.



Create Member Profile

Title *
 MC

DOB *

First Name *

Phone Number
 04

Last Name *

Email

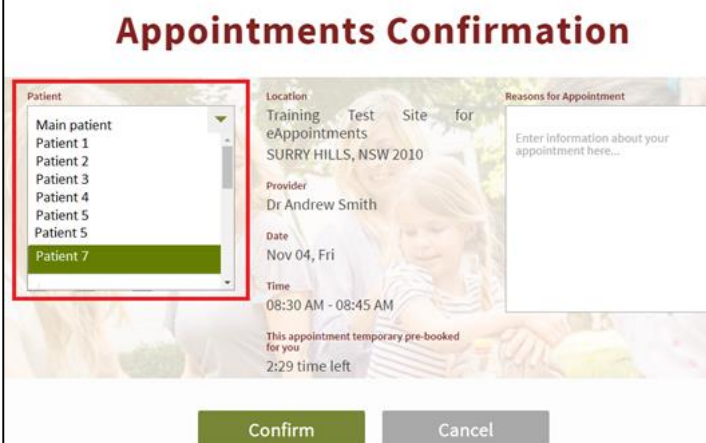
Middle Name

* required fields

Apply & Save Cancel

Making an eAppointment for a family member:

- In eAppointments, the patient must select the desired time for the eAppointment by clicking on the time slot.
- On the 'Appointment Confirmation' screen, from the drop down menu, the patient must select the family member that they would like to book an appointment for.



Appointments Confirmation

Patient
 Main patient
 Patient 1
 Patient 2
 Patient 3
 Patient 4
 Patient 5
 Patient 7

Location
 Training Test Site for
 eAppointments
 SURRY HILLS, NSW 2010

Provider
 Dr Andrew Smith

Date
 Nov 04, Fri

Time
 08:30 AM - 08:45 AM

Reasons for Appointment
 Enter information about your appointment here...

This appointment temporary pre-booked for you
 2:29 time left

Confirm Cancel

- Then, they must click on 'Confirm'.

ENHANCEMENT: eAppointment – D4W/PSS New Patient Status logic for eAppointments

An enhancement has been made to the New Patient Status logic used when patients book through eAppointments.

The fields used to perform the patient match remain unchanged (Firstname, Surname, Mobile number); but now, lack of 'First seen date' is taken into consideration to assign a status type 'N' (or official New Patient status) to a patient.

When a patient makes an eAppointment:

- If a patient match is found in D4W and 'First Seen Date' is not empty, then an appointment is created.
- If a patient match is not found in D4W, then a new patient card is created and an appointment is created with Status type 'N'.
- If a patient match is found in D4W but 'First Seen Date' is empty, then an appointment is created with Status type 'N'.

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eAPPOINTMENTS

ENHANCEMENT: Remove all words from the green sub-heading of appointments slots

An enhancement has been made whereby the writing on the green sub-heading strip of eAppointments has been removed.

ENHANCEMENT: Registration and password recovery SMS and email changes

An enhancement has been made to:

- eServices registration SMS to patients
 - Previous SMS – From YourDental: Welcome to eAppointments! Your confirmation code is \$code.
 - New SMS – From YourPractice: Welcome to eServices! Your confirmation code is \$code
- eServices recovery password email to patients
 - Previous email – Subject: Password Recovery for eAppointments
 - New email – Subject: Password Recovery for eServices

ENHANCEMENT: Improving of UI eAppointments

A couple of enhancements have been made to the UI (user interface) of eAppointments.

For multiple practice locations

- Rename of:
 - “Sign Up” to “Create account”

For single practice locations

- If there’s only 1 provider the ‘Find Provider’ drop down menu automatically populates itself.
- Rename of:
 - “Sign Up” to “Create account”

ENHANCEMENT: Official recall status “r” given to eAppointments booked under ‘reason’ “recall

An enhancement has been introduced to eAppointments, whereby eAppointments made using the ‘reason’ “recall” are given the official ‘recall status’ “r” in your D4W/PSS Appointment book.

ENHANCEMENT: DOB field in eServices: Functionality added to type DOB directly into field

An enhancement has been introduced in eServices whereby users can now type their DOB directly into the ‘DOB field’ when:

- They edit their patient profile in the eServices portal.
- When they are signing up to the eServices portal.

ENHANCEMENT: eServices Grouping ID

An enhancement has been made to help owners of different practices under the same Company, manage their practices in eServices separate from each other, improvements include:

- In eAppointments, patients of Owner1 will only see times available at sites of Owner1.
- In eForms, patients of Owner1 will only be able to access eForms at sites of Owner1.

ENHANCEMENT: eAppointments ‘reasons’ list will only display applicable ‘reasons’

An enhancement has been made to eAppointments whereby when a user assigns a duration to a ‘reason’ = 0, that ‘reason’ will disappear from the ‘Specify reason’ drop down menu in the extended search screen of eAppointments. Only ‘reasons’ with duration >= 1 will be displayed in the drop down menu.