

# NEW FEATURES AVAILABLE IN Vi4 ==== BUILD 4272== Vi4/PB12 ====

#### ENHANCEMENT: Appt Reminders: Calendar File attachment and Enhancements

A few cosmetic changes have been made to this feature.

When the upgrade is performed the cosmetic changes will be appear as below:

#### 1. Message Reminder

The message within the reminder will be exactly the same as the body of the email



#### 2. Email subject

The subject of the email and reminder will be displayed as: Reminder from %Title% %Prv1stName% %PrvSurname%

#### 3. Space

The space between the header, the appointment data and footer has been removed

🐙 Edit reminder message*			X
This is an appointment rem Mon, 07/11/2016 at 15:45 02-95580891.	inder for Dr F S Please call to c	pencer on confirm on	4
Symbols left: 43			
Include calendar file	<u>C</u> ancel	<u>S</u> end	

#### 4. Date Rage Options

The options in the dropdown list hasn't been increased from today and tomorrow only to today, tomorrow, next 7 days and next 14 days

	Remin	der list parameters					
Ι	Next 7	7 days	From 12/12/2017	to 18/12/2017	ОК		
(	Tomo	rrow		~	Cancel		
V	Next 7	7 days	Family & Friends De	ental Surgery 🗸			
	Appoi	ntment books					
	1	Dr Phil McCavity			^		
	2	Dr Frank Papadopo	oulos				
	3	Dr Molly Kewell					
	4	Dr Smith					
	Show inactive books Select All Deselect All						

#### ENHANCEMENT: SMS Web - Improve Messages sent logic when creating a new patient in Appointments

An enhancement has been made for when a <u>new</u> patient makes an appointment and the 'Send SMS on Appointment Scheduling' and 'Send SMS on Patient Registration' settings are set to 'Yes' where the patient will now receive 2 SMS (Appointment Scheduling and Patient Registration)



The patient can receive an SMS saying welcome to the surgery, visit our website to fill the new patient's form and the other message would be confirming their booking

To turn on this setting go to: Location Setup > General tab: SMS Setting > Send SMS on Appointment Reminders

Also in this enhancement the word Responses was misspelled as Reponses under Location Setup > Group: SMS Setting

Yes Reponses for Appointment Reminders
 No Reponses for Appointment Reminders

#### ENHANCEMENT: Automation: Improve Send to Improve "Send To"

The D4W system has been revised to allow multiple communication methods to be sent to a patient. The enhancement of this feature will also have the ability to send reminders to family members, insurance, guardians and third parties.

Practices now have the ability to set the order of communication methods in the Appointments, Recalls and Debtors batch when working with automation. Eg: If the patient has allowed multiple communication methods to be sent then the order is determined by the batch.

With this enhancement users won't receive the following message if multiple methods of communication are selected.

Selected patients with incorrect E-mail or not E-mail "send to" property They will be excluded from list				
Emerson, Ms Jayde, #3 - not E	-mail "send to" property			
<	>			
Print Save As	Cancel Continue			

#### Patient Records > Patients tab > Address sub-tab

Here is where you will setup how each patient should receive their reminders. When working with families you are able to direct reminders to the family head, other members of the family or to the individual patient. You can also setup for Guardians, Third party and Insurance to receive certain reminders

Send Appt. Reminders	Family	$\sim$	Sam 🗸	/	Telephone (Mobile), Telephone (Home)	
Send Invoices to	Family	$\sim$	Sam 🗸	/	Letter (First Address), Telephone (Mobile), Telephone	
Send Recalls to	Family	$\sim$	Sam 🗸	/	Not known at this time	
Send Queries to	Guardian	$\sim$	Smith, Mrs Aline 🗸	/	Telephone	

The Appointment Reminders feature has been moved from 'Recalls/Referrals' to 'Address' sub-tab. The Appointment reminders still can be setup when making a new patient appointment

🖢 Appoint	➢ Appointment for patient						
? Find an	existing patient	Enter new pa	atient				
Title	Mr 🗸		Member of family				
Surname	Ogier						
First	Heath	Occupation					
Middle		Main Prv	3 -Dr Oymoll Ynjkacl 🗸				
DOB	01/01/2000 Age 17	Fee Level	Fee level Standard				
Phone H	1	Address					
Phone W	1	Suburb					
Mobile	1	Postcode	State				
E-mail							
Reminders	Family 🗸	Heath					

Note: By default all reminders will be sent to 'First address' when entering a new patient



 Cancel
 OK

 Datient's reminders.
 OK

 Dors) > Reminder sub-tab.

 Set / Type Settings
 Reminders Schedule

 Send communication to family head

 3 v
 Letters Template

 2 v
 E-mail Template

 1 v
 Sms Template

 4 v
 Postcard (Label)

Phone Call

# Communication Methods

The user has three options to select from when setting up the patient file

- 1. Not known at this time (by default)
- Communicate using the following methods
   A communication method can only be selected if a patient has the information
   recorded on file. Ex: Patient can only receive a SMS if they have a mobile number.
   A patient can choose to have multiple communication methods
- 3. The patient has requested no further communication

#### Automation

In automation the surgery will select the order for their communication to be sent for their patient's reminders. Location Management > Automation tab > Under each tab (Appointments, Recalls and Debtors) > Reminder sub-tab.

- Tick 'Send communication to family head' if required Relates to the "Send Recall To" field within the Patients tab. If this is ticked it will ignore those settings and send the recall reminders to the family head.
- Select the order for each method from the drop down list
   If a communication method is not used by the surgery select (-)

# ENHANCEMENT: Improve Non-Treat Function in Print Entire Record

The primary purpose of the Non-Reporting and Non-Treatment attributes is to allow the users to write 'administration' notes and not be included in reports provided to another practice or patient.

Some parts of the Treatment and Financials section of the Consolidated Patient Record Report have been redesigned to filter non-treatment items out of the Consolidated Patient Record Report.

# Patient Records > Patients Details tab > Patients menu > Consolidated Patient Record

ct the requirements for the	e report:				ок
Patients		y V	Include Patient His Include Patient Cu	story Audit Istom Fields	Cance
Perio		$\sim$	Jaw Upper	$\sim$	
Charting	15/12/2017 13:55:43	$\sim$	ONormal	() 3D	
<ul> <li>Treatment and Financia</li> </ul>	als				

- 1. Treatment Plan Notes
- 2. <u>Treatment Done</u>
- 3. <u>Clinical Notes</u>
- 4. Include Non-Reporting Items
- 5. Include Non-Treatment Items
- It will show any clinical notes entered in the 'Nt' column in Treatment Plan tab It will show all completed items in Treatment tab

It will show any clinical notes entered in the 'Nt' column in Treatment tab

- Untick to exclude Non-Reporting Items notes
- Untick to exclude Non-Treatment Items notes





Select Allowed Communication Methods



Note: Items are marked as Non-Reporting and Non-Treatment under Items tab. For more information on how to setup Items, refer to 'How to work in Items' how to doc

#### ENHANCEMENT: Include patient card number on Treatment Plan printouts

The Treatment Plan printouts have been enhanced to automatically include the patient card number

#### Patient Records > Treatment Plan tab > Treatment Plan menu > Preview Plan and Preview Plan/Insurance Information (A4 only)

Treatment Plan Card No. 74	Date created: 15/11/2017 Date created: 15/11/2017 Date Date Date Date Date Date Date Date	ate printed: 11/1: los Prov-12345	2/2017 10:18 67D			Ì	Treatment Plan & Card No. 74	surance Information	Date created: 15/11/20 Plan by: FP - Dr F. Pa	017 Date padopoulo:	printed: 11 Prov-123	/12/2017 11:11 <b>\$567D</b>	ID 8	2	
Visit Time Phase Min Item	Times Description	Tooth	Fee Amount	Appt Date	Appt Time	Date Done	Visit Time Phase Min Iter	Times Descri	ption	Tooth I	ee Be	nefit Gap	Appt Date	Appt Time	Date Done
1 534	1 Adhesive restoration- 4 surf- post	36	2.00 2.00				1 5	4 1 Adhesive rest	oration- 4 surf- post	36 37	2.00	0.00 2.00	)		

#### ENHANCEMENT: Invoice & Receipt Reports - Automatically Breakdown Invoice into separate Patients

Before the upgrade when creating a family invoice the system would automatically select the entire family with outstanding amount. You could unselect any family member by unticking the account after pressing F2.

Patient	[78] Lew	/is, Jo	hn ; 150 Smile	Street, WA	TERL	DO NSW 2017	Create Itemised Invoi	ce		
From	08/11/20	)17 <b>t</b>	08/11/2017				Invoice Date	08/11/2017	Main Responsi	ible Party Family
Membe	r Prv	Ass.	Date	ltem	Qty	Description	FAMILY INVOICE		Send to	Clinton
John	JBB		08/11/2017	515	1	Metallic restoration- 5surf- direct	Inveice Tetal	20.00	Addeese to	Address 4
Clinton	JBB		08/11/2017	515		Metallic restoration- 5surf- direct	invoice total	30.00	Address to	Address 1
John	JBB		08/11/2017		1		Discount	Discount 🗸	Providers	(JBB) Black, Mrs Jenny
							By percentage (%)	.0		
							or By Amount (\$)	.00		
							Invoice Balance	30.00		
							Including GST	1.43		Invoice breakdown by Provider
										Show extended attributes
							Dessive Devenant		Canaal	Craata Braview Driet
							Receive Payment		Cancel	create Preview Print

In this new upgrade the 'Automatically Breakdown Invoice into separate Patients' setting will appear. If the setting is set to Yes when creating a family account the system will create one invoice per patient.

Location Setup > General tab > Group: Accounting: Invoices & Receipts > Automatically breakdowns Invoice into separate Patients = Yes

Patient	[78] Lev	ris, Jo	hn ; 150 Smile	Street, WAT	TERL(	DO NSW 2017	Create Itemised Invoi	ce		
From	08/11/20	)17 <b>t</b>	08/11/2017				Invalian Data	00/44/0047	Main Deenensi	his Danty Camily
Membe	Prv	Ass.	Date	ltem	Qty	Description	Invoice Date	08/11/2017	Main Responsi	bie Party Family
John	JBB		08/11/2017	515	1	Metallic restoration- 5surf- direc			Send to	<u>Clinton</u>
Clinton	JBB		08/11/2017	515	1	Metallic restoration- 5surf- direc	Invoice Total	15.00	Address to	Address 1
John	JBB		08/11/2017		1		Discount	Discount 🗸	Providers	(JBB) Black, Mrs Jenny
							By percentage (%)	.0		
							or By Amount (\$)	.00		
							Invoice Balance	15.00		
							Including GST	0.71		Invoice breakdown by Provider
										Show extended attributes
							Receive Payment		<u>C</u> ancel	Create Preview Print

#### **NEW: Discounts for Marketing Promotions**

A feature was created to apply discount for promotions as an addition to the discount category feature.

By creating this promotion feature for treatment, a combination or individual items can be discounted according to any current promotions at the time of creating an invoice which will help practices to manage their promotions. Promotions is the common use type of discount, designed and setup for multiple use by many patients (ex. shopping vouchers for set of procedures performed, Birthday discount, etc.).

Creation of a seamless discounting process to enable easy creation and use of promotions without:

- Creating new item codes
- Manual entry of fees in Treatment Details tab



# <u>Activati</u>on

The following areas needs to be setup by users before using this feature.

1. Activate Promotions

Location Setup > General tab > Group: Accounting: Invoices & Receipts > Activate Discount Promotions = Yes Activate Discount Promotions Yes

After activating the feature, it is necessary to close and reopen D4W to complete the activation

# 2. Setup Promotion Types

Location Setup > System Tables tab > System Tables: Promotions Type

System Tables Promotions Types				
Promotion Type	Active	Default	Show On Invoices	Class
Package				Master
Items				Master

Currently only two promotion types are available in the system. Users can make these promotions active/inactive, select a default promotion and select if they a promotion is to be shown on the invoices.

The promotion marked as default will automatically be selected when creating a promotion.

#### 3. Security

Security has been added as default for the following areas.



# Setup

The promotions needs to be setup before it can be used in a patient's invoice.

Location Management > Promotions tab

#### **Create a Promotion**

To create a new promotion under Package or Items promotions go to Operations menu > New Promotions or press 'Add' or use the 🗔 icon

Note: If you are working with multi-location environment the location must be selected before creating a promotion considering that you may not be working in the default location.

#### a. <u>Package</u>

<b>Promotion Details</b>	
Туре	Select the type = Package
Name	Type the promotion's name
Capped Amount:	It will show the amount of all items combined
Active Period	Select start and finish date of the promotion
Activated	After a promotion has been used in an invoice it can't be deleted but marked as inactive by unticking the 'Activated' box and the finish date will be changed to today's date
Promotion Items	
Туре	This will change depending on what is selected in the 'Set/Type' option
Add new Items	Click on item/s to be included in this promotion and press 'Find an Item' to find item/s



Туре	You can select compulsory (C) or optional (O) a. Compulsory means that any item/s marked as 'C' must be included in treatment when using this promotion. At least one compulsory item is required to use 'Package' promotion b. Optional means that any item/s marked as 'O' can be or not included in the
	treatment when using this promotion
Ş	Not Applicable
%	Not Applicable
Fixed Fee	Type the fee amount to be charged for each item when using this promotion. The original scheduled fee must be higher than the promotion fixed fee Fee for "C" items can't be = 0 Fee for "O" items can be = 0
Apply values	Oser's can update the rees by creating a new value and increase or decrease an existing ree         The fees can be updated simultaneously, by selected rows or a value range         Apply new values for Promotion items         You may modify items Fixed Fee of the Promotion.         Image: New value       Increase         Image: Image

# b. <u>Items</u>

Promotion Details						
Туре	Select the type = Items					
Name	Type the promotion's name					
Amount	When choosing 'Amount' the users will enter the \$ amount to be deducted from the scheduled fee for each item included in this promotion					
Percent	When choosing 'Percent' the users will enter percentage of \$ value to be taken from the scheduled fee per item included in this promotion					
Fixed fee	When choosing 'Fixed fee' the users will enter the fee to be charged per item includ this promotion	ed in				
Active Period	Select start and finish date of the promotion					
Activated	After a promotion has been used in an invoice it can't be deleted but marked as inac unticking the 'Activated' box and the finish date will be changed to today's date	ctive bu				
Promotion Items						
Туре	Not applicable for Item's promotion					
Add new Items	Click on item/s to be included in this promotion and press 'Find an Item' to find item	n/s				
\$	If 'Amount' was selected, users will enter the amount here	S  10.0 0.0 0.0				
%	If 'Percent' was selected, users will enter the percentage here	% 5.0 0.0				
Fixed Fee	If 'Fixed fee' was selected, users will enter the fees here. The original fee must be higher than the promotion fixed fee	Fixed Fee 45.0 1000.0				
		200.0				



The fees can be Apply new values for Pror	updated simult	Itaneously, by selecting rows or a value
You may modify items Fixe	d Fee of the Promotion.	
New value     O Incre     130.00	ease 🔿 Decrease	
Rows filter All rows	O Selected Only	
Values Range (inclus	ive)	
m <u>50.00</u> \$	To <u>300.00</u> \$	
	Cancel <u>O</u> K	2K

#### **View Promotion**

#### Location Management > Promotions

1. Promotion Type <all></all>			$\sim$	Location2	Dental F	ractice #	1	~
Promotion Name	Туре	Active	Date From	Date To	Capped	3.	Item	Description
Bleach	Items		13/12/2017	14/12/2017			011	Comprehensive Oral Examination
Bleach 2018	Package	$\checkmark$	14/12/2017	30/04/2018	1200.00		442	Bleach Kit
New Visit	Package	$\checkmark$	13/12/2017	14/12/2017	1530.00			
4								
Show inactive Promotions				8. Co	py to Loca	tion(s)		
5. Add 6. Edit	7.	De	lete	9. Du	plicate Pro	motion		

- 1. Select 'Promotion Type' from drop down list
- 2. Select Location (applicable for multi-location environment)
- 3. By double clicking in any area marked as #3, the 'Edit Promotion' box will appear. You will be able to mark any promotion inactive or change any details of the promotion if the promotion hasn't been used in an invoice
- 4. Tick to show inactive promotions
- 5. Create a new promotion Package or Items
- 6. Edit any existing promotion/s
- 7. Delete a promotion (if it hasn't been used in an invoice)
- 8. When working with multi-location environment users will have the option to copy promotions between locations
  Select Location(s) to copy Promotion to

Loca	tion		New name				
Smile Dental		Bleach					
Family Dental		Bleach					

9. Promotions can be duplicated and the name of the promotion can be renamed if needed

🔄 Duplicate Promotio	n		>
New Promotion's name:	Bleach		
		Cancel	ОК

# <u>Usage</u>

Promotion applied to an invoice in time of creation (F2)

Patient Details >Treatment tab



- 1. Enter items in Treatment tab or transfer from Treatment Plan
- 2. Create an invoice by pressing (F2)
- 3. Tick 'Include Promotion' to use a promotion

Create Itemised Invoi	ce					
Invoice Date	14/12/2017	Main Respo	nsibl	e Party	Family	$\sim$
		Send to		Ana		$\sim$
Invoice Total	1620.00	Address to		Address	s <b>1</b>	~
Discount	Discount 🗸	Providers		(1) Lmne	ecli, Dr Inkerr	
By percentage (%)	.0					
or By Amount (\$)	.00	(rounded)	$\left( \right)$		de Promotion	
Invoice Balance	1620.00	Referral		<none></none>	$\sim$	~
Including GST	136.36			Invoic	e breakdown l	by Provider
				Show	extended attri	butes
Receive Payment		Cancel		Create	Preview	Print

4. Under 'Select Promotion for Invoice' [window] highlight which promotion to use in this invoice

Туре	Promotion Name	D	Item	Туре	\$	%	Fixed Fee
tems	Bleach	13	118	С			1200.00
ackage	Bleach 2018	14	012	0			0.00
Package	New Visit	13					
				Pr	omotion's	Status	
			Promotio	Pr n total: 42	omotion's	Status	

Note: Only 1 promotion can be applied per invoice

5. After the promotion is applied the fee in treatment will be adjusted and the user can complete the invoice/receipts as normal

Create Itemised Invoid	ce			
Invoice Date	15/12/2017	Main Responsib	le Party Family	~
		Send to	Ana	$\sim$
Invoice Total	1620.00	Address to	Address 1	$\sim$
Promotion	420.00	Providers	(1) Lmnecli, Dr Inkerr	
Discount	Discount	Promotion		
By percentage (%)	Bleach 2	018	Include Promotion	
or By Amount (\$)	.00	(rounded) Referral	<none></none>	$\sim$
Invoice Balance Including GST	1200.00 109.09		☐ Invoice breakdown by Provi ✓ Show extended attributes	der
Instalment Plan	Auto allocati Number of inst	on alments <mark>1</mark>	Over a period of Days	~
# Amount Promo	tion Discount	Balance Due Date	Resp Party Notes	
1 1200.00 420	0.00 .00	1200.00 15/12/201	17 Ogier, Ana	
Generate Insurance	Claim Form 🗌			
Other info AF	0 🖲 No 🤇	) Yes () Part	Claim ID	
Receive Payment	<b>€</b> \\[\\!5€	Cancel	Create Preview Pri	nt

After the promotion has been applied it will be identified in 2 places in the invoice box

The user can hover over the promotion amount to see which type of promotion has been applied



#### Patient Details > Invoice tab

Patients Q Charting	3D 0	Charting	Perio	🔓 Tre	eatPlan	Treatment	🔍 Invoid	es	S Claims	Receipts	Letters	🔭 Adv	Notes 🗎
Patient [9539] Ogier,	ient [9539] Ogier, Ana DOB: 01/01/2000; Age: 17; ph:62135000 mob:0411111111												
Family View	mily View PPA only Show reversed records												
Main RP	Prv	Invoice ID	Date	Inst.	Period	Rebate	Total	Prom	otion Discour	nt % Discount	Received	Balance	Expense
Ana (Ana)	1	4719	0 14/12/2017	1	0 Days	0.00	1620.00	42	0.00	0.00	1200.00	0.00	0.00
			00/00/0000					_					
			00/00/0000						Promo Type:		Package	1	
			00/00/0000						Promo Name	5	Bleach 2018	3 🛛	
			00/00/0000						Promo Status	1	Active	. 1	
			00/00/0000						Promo Date:	From:	14/12/2017	1	
			00/00/0000						Promo Date:	To: 30/04/20	18		
			00/00/0000						Promo Amou	unt:	1 Dental Pra \$420.00	actice #1	

The applied promotion will also be displayed in the Invoices tab

User can hover over the promotion amount to see details of the promotion given to the patient

#### Reports

Three reports are available to display the promotion. Location Management > Reports tab

1. Accounting: Invoices and Receipts over a period report

In this report the promotion amount will be identify by 'Pr' next to the promotion amount. If discount was also given in conjunction of the promotion both \$value will be displayed in the discount column without the 'Pr'

Invoices	voices and Receipts for all providers					Fror	n 14/12/2 Printed:	2017 to 1 14/12/2013	<b>14/12/20</b> 7 12:55	<b>17</b> P	age 1 of 1
(1) Lmne	ecli. Dr Inkerr		Invoice de	etails				Receipt	t details		
	,	Inv/Rec	4	%	\$	\$			%	\$	Credits /
Dated	Name	ID	Total invo	olved	Discnt	involved	Expense	Total	involved	l involved	Deposits
14/12/2017	Ogier, Ana	47187	1620.00 10	0.00		1620.00					
14/12/2017	Ogier, Ana	47187	10	0.00 P	r -420.00	-420.00					
14/12/2017	Ogier, Ana	47187						1200.0	0 100.00	1200.00	
Totals for	(1) Lmnecli, Dr Inkerr	Totals			-420.00	1200.00	0.00			1200.00	0.00
from	14/12/2017 to 14/12/2017			_					-		

#### 2. Promotions List

This will report will help practices, especially the Marketing Dept to have an overview of their promotions. It will show all promotion status, start/finish date of the promotion and how many promotions have been used for the period selected in the report parameters.



#### 3. Promotions report on Patients

This report will show details of a promotion when it has been applied to an invoice for the period selected in the report parameters

Location: Promo	tions per	formed on Patients Fro	m 14/12/2017	to 14/12/2017		Page 1 of 1		
Dental Practice #1						2/2017 08:30		
Promotions Type: Package	romotions Type: Package							
Promotion Name	Promotion Name Date Patient Name		Patient Card #	Invoice ID	\$ Promo	\$ Invoiced		
Bleach 2018	14/12/2017	Ogier, Ana	9539	47187	420.00	1620.00		
Total of Package Promotions for Location: Dental Practice #1 1 1					420.00	1620.00		
Total for Location: Dental Practice #1 1 1					420.00	1620.00		



NOTE: When copying a promotion between locations and if any compulsory item involved in the promotion package doesn't belong to this location the practice will not be able to use this promotion

Please refer to Item's how to doc for more information on how to work with Multi Location Items

#### NEW: Multi Location handling be in Fees

Within a multi-location environments, there are fee levels that are common to all or specific location/s. In this new feature the users will be able to:

- 1. Set a Fee for an item based on the location at which it was performed
- 2. Have the ability to filter the list of fee levels displayed to the user based on the users logged in location
- 3. Holidays will be able to be set on a per location or group of location basis
- 4. A user will have access to a new report will show the fee for each item based on the location where the item is being performed

# Feature Notes

- 1. All locations will contain the same fee level names
  - a. Fee Level Fee period dates will be the same for all locations
  - b. A user will be able to set the default fee level on a per location basis i.e. each location can have a different default fee level
    - i. Where a user changes "Use Location Based Fees" to "Yes" the existing default fee levels for existing locations will be kept
    - ii. When a user selects "Set as default level" the selected fee level will be made default for the location the user is viewing
  - c. Where a user adds a new fee level it will be made available to all locations
    - i. Where a user choses to copy Fees when creating a new fee level all locations will be given the same Location Fees

# <u>Activation/Setup</u>

The following areas needs to be setup by users before using this features.

4. Turn on location based fees

Location Setup > General tab > Group: Accounting: Invoices & Receipts > User Location based Fees = Yes

The following message will appear when the feature is turned on. It is recommended that "Yes" is selected



By default the 'User Location Based Fee' setting is set to 'No', if the users have this setting set to 'Yes' and wants to change back to 'No' the following message will prompt to select location for which single Location Fee will be based on





#### 5. <u>Security</u>

Security has been added as default for the following areas.

🗌 🛍 Fe	es
🗹 🙆	Change how patient location fee is calculated
🗹 🙆	Determine fee when changing Treatment provider

### 6. <u>Setting up Patient Fees</u>

Three options have been added to this feature to allow users to choose how the patient's will be assigned to a fee level

Location Management > Fees tab > Operations menu > 'When setting patient Fees'. "Use the Treating provider's location" is recommended

Operations Window Help		
Refresh Screen	F5	
Fee Levels Report		
When setting Patient Fees	>	Use the location in patient details
When changing Treatment Provider	>	Use the location of the patients main provider
Preferred Provider Scheme List		Use the treating providers location

- i. The system will look for the patient's location under Patient Records > Patient Details tab > Insurance /Various sub-tab
- ii. The system will look for the location of the patients main provider under Location Management > Providers tab and patient's main provider under Patient Records > Patient Details tab
- iii. The system will look for the treatment provider's location
- 7. Treatment Provider

Three options have been added to this feature to allow users to choose how the fees will perform when changing providers

Location Management > Fees tab > Operations menu > 'When changing Treatment Provider'

Ope	rations	Window Help			
	Refresh	Screen	F5		
	Fee Lev When s	els Report etting Patient Fees	\$		
	When c	hanging Treatment Provider	>	✓	Prompt user to change or keep the item fee
	Preferre	ed Provider Scheme List			Do not change the item fee
	Generat	te Fee Import Template			Automatically change the item fee to Providers location

# Fee Level Setup

When the feature is turned on the following options will be available within the Fees module to allow users to set a fee for an item based on the location at which the treatment was performed (Location fee)

#### Location dropdown

A new "Location" dropdown list has been added to Fees tab to allow users to view and set Location Based Fees

Location Fee Levels			Location	Dental Practice #1
Fee level description	Default	Sho	Period	1 Dental Practice #1
Fee level 13			from 16/	36 Smile Dental
Fee level 14				Sr Tanniy Dental

#### New Level

Location Management > Fees Tab > Select 'New Level' button Fee

While in the 'New Level of Fees' window, you have the option to copy fees from an existing fee level to the new level you are creating; or simply add a new level. When created, you can start adding your fees to the 'Fee (\$)' column

Select a location from drop down list if you wish to copy the fees across to the new fee level

	SOFTWARE providing great solutions
New level of fees Here you may copy all fees from existing level to new Copy all fees Location Dental Practice #1 to new Dental Practice #1 None Since 11/12/2017	Select a current fee level from this drop list to copy the fees to the new fee level.
Cancel OK	Type the name of your new fee level here.

#### Fee Mode

When working with Multi-location environment the modes chosen for each item number will be the same across all locations

Variable	Fee can be changed in Treatment/Treatment Plan
Fixed	Fee is not able to be changed in Treatment/Treatment Plan
Increase	Fee can only be increased in Treatment/Treatment Plan

Mode	
Variable	Ŧ
Fixed	4
Increase	4
Decrease	Ŧ

Locatio	on Dental Practice #1	ling type None		Locatio	on Smile Dental	lilling type	Vone
Period from	01/03/2012			Period from	16/05/2015		• 🔹 🗅
Item	Description	Fee (\$) GST Mode	K	Item	Description	Fee (\$)	GST Mode
011	Comprehensive Oral Examination	60.00 GFixed 🗸	ν	011	Comprehensive Oral Examination	60.00	OFixed

#### **Provider Based Fees**

This feature allows each provider to have their own fee schedule. The provider completing the treatment determines the fees for the patient.

E.g. Provider 1 charges \$52.00 for a 011, but Provider 2 charges \$58.00

Location Management > Fees Tab > Highlight the 'Provider Based' Fee Level > Select the 'Default Level' button Add a new fee level for each provider, and add their individual fees to each of the item numbers.

Fee level description	Default
Veterans Affairs	
BUPA	
MBF	
Dr Jones	
Medicare Benefits	
🕝 Provider Based	✓

Fee Levels can then be allocated to Providers. To do this:

Location Management > Providers Tab > Select the Provider and their Fee Level from the 'Fee Level' drop list.

Fee Level Dr Jones

#### **Default Fee Level**

One Fee Level is able to be selected as the default fees for all new patients per location. To set a fee level as a default, highlight the fee level and select the 'Set as default level' button.

Set as default level

септацс

#### **Fee Periods**

To ensure fees are never erased/typed over in D4W/PSS you should always create a *new period start date* each time you edit the fees. Keep in mind that Treatment Plans and unaccounted treatment take information from the fees section, so it is best to keep a record of each fee charged per date range.



E.g. 01/07/2009 – 31/06/2010 – Standard Fee for a 011 = \$55, but as of 01/07/2010 the fee will be \$60.

Location Management > Fees Tab > Highlight the level you wish to update > Select the 'Add New' button > Enter the date this new fee schedule is to start.

You are now ok to start overwriting the current fees.



Treatment Plans can either base their fees on the date of the plan or today's current fee schedule. You can setup your preference in:

Location Setup > General Tab > Group: Treatment > When adding items to an existing Treatment Plan, use the item fee period of...

🖀 When adding items to an existing Treatment Plan, use the item fee period of	Date of the plan
When inserting items in treat or plan tab and there is a surcharge present, round to the pearest	Date of the plan
m when inserting items in treat of plan tab and there is a surcharge present, round to the nearest	Today

#### **Update the Fees**

Location Management > Fees Tab > Highlight the fee level you want to update > Select 'Update the Fees' button

Note: You should be updating the current fee period before updating fees.

While in the 'Update Fees' window you can Increase/Decrease the fees by a %, this can be for all fees or for fees currently between a certain \$ amount. You can also round your fees from none to the nearest \$1.00.



#### Automated Fee Update/Import

Users are able to import 'Fee Levels' information into D4W/PSS from an external source by allowing surgeries to update fees from an Excel template, which can be sent to all surgeries to import into D4W/PSS.

#### **Export Fees Template**

Location Management > Fees Tab > Operations Menu > Generate Fee Import Template

Export Type		
		Export newest fees for all Fee Levels for this locations
Export Template with newest fees for this location	<b>~</b>	
Export Template with newest fees for all locations	-	Export newest fees for all Fee Levels for all locations
Export Template without fees	-	Export a blank excel template for all Fee Levels
Cancel		

When fees are updated in the Excel template you will be able to import it to D4W/PSS for a specially location.

#### Import New Fees



You can setup security for "Import fees from file". Location Setup > Security Tab > Setup Security > Fees > Import fees from file Please refer to 'Security\_How to setup' for details.

#### **Copy From**

Location Management > Fees Tab > Highlight the level you want to copy to > Select 'Copy From' button Note: You should be updating the current fee period before copying fees. While in the 'Fees Transfer' window, select the location and fee level you wish to copy from and the date range you wish to copy.

Fees transfer It is possible to copy all fees from one level to another (All previous fees will be replaced)			This is the location you
Location from Smile Dental to Smile Dental Fee level 10 Fee level 10 Fee level 3tandard None 16/05/2015 - 01/01/3000 None 16/05/2015 - 01/01/2000 None 16/05/2015 - 01/01/2000 None 16/05/2015 - 01/01/2000 None 16/05/2015 - 01/01/2000 None 16/05/2000 None 16/05/200	Tł	nis is the fee level you	from.
Cancel UK	w	ant to copy from.	

Once you have said OK, the fees from the selected level will be updated.

#### **Inactivate Level**

Location Management > Fees Tab > Highlight the level you want to inactivate > Select 'Update the fees' button > choose if the changes will be applied to this or all location > tick 'inactive' box > Select a fee level to assign the patients from the inactive level to

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#### from the drop-down list box

Update fees	
You may modify the fees by	a percentage.
You can specify a specific ra of rounding off the calculatior	nge fees and the method
● Increase fees or ○ De	crease fees
by %	
Fee range to update	Update all fees
From \$ to \$	(inclusive)
Round fees to the nearest No	ne 🗸
Apply these changes to	
Smile Dental	All Locations
Inactive	
Move patient to Fee level S	tandard 🗸 🗸
move parent to	
	Cancel OK

The following message will appear for users to choose. Please read this message carefully.

Dental 4 V	Vindows SQL	×
?	You are about to update the Fee Level of patients who have Incomplete Treatment Plan Items or non-invoiced Treatment items.	
	Do you want to recalculate the fee of these items based on the patient's new Fee Level? (Applies only to fees greater than zero).	
	Click 'Yes' to recalculate the fees,	
	'No' to leave the fees as they are, or	
	'Cancel' to cancel this change, without any updates, if unsure.	
	Yes No Cancel	

#### **Activate Level**

Location Management > Fees Tab > Highlight the level you want to reactivate > Select 'Update the fees' button > untick 'inactive' box

#### **Delete Level**

Location Management > Fees Tab > Highlight the level you want to delete > Select 'Delete Level' button A Fee Level can only be deleted if no patients are associated with this fee level. You can run the report: Location Management > Reports Tab > Fee Levels and Patients List. This report will show you all patients associated with the fee level, you can move them to another fee level and then delete.

#### Surcharges

You have the option to add a surcharge for work completed on a Saturday, Sunday or Public Holiday. The surcharge is added as a percentage and can be for all item numbers per individual location, or only those you wish to allocate a surcharge to.

To turn the feature on:

Location Setup > General Tab > Group: Treatment > Activate FESS TAB SURCHARGE FOR SAT/SUN/PHOL

Activate FEES TAB SURCHARGES FOR SAT/SUN/PHOL

Yes

To setup the surcharges:

Location Management > Fees Tab > Highlight the Fee Level you wish to add surcharges to If you wish to add a surcharge % to all items simply click on the day and enter the percentage. Otherwise you can enter the percentage against the item numbers you wish to charge the surcharge.



To setup Public Holidays:

Location Management > Fees tab > Select 'Set Public Holidays' button > Press 'Add' > Write Description > Select date > Select Locations > Press 'Add'



🝃 Add Public Holiday								×
Description Aus Date 26/01/2018 ESS Date 26/01/2018 ESS Dantal Practice #1 Smile Dental Family Dental	etralia Da Mon 1 8 15 22 29	y 2 9 16 23 30	Ja Wed 3 10 17 24 31	2018 anuar Thu 4 11 18 25	y Fri 5 12 19 26	<b>Sat</b> 6 13 20 27	3 5 7 14 21 28	
<								>
				<u>C</u> a	ncel		A	dd

🔊 Public Holi	idays				>
	Date		Description	Location	
26/01/2018		ESS A	istralia Day	Dental Practice #1	
Add	Delete	Edit		Print	Exit

The Public Holiday can be edited and deleted at anytime

#### Setting up GST

Location Setup > Items Tab > Record Menu > GST Tariffs > Add a new start date if required > Enter the GST against each of the items numbers that require a GST percentage.

NOTE: Fees are inclusive of GST, the 10% will <u>not</u> be added to increase the fee.

🖢 GST tar	iffs	X				
101114		±) [_]				
Item	Description	GST (%) 🔺				
01	01					
011	Comprehensive oral exam					
012	Periodic Oral Examination					
013	Oral exam- limited					
014	Consultation					
015	Consultation- Extended					
016	Consultation by referral					
017	Consult by referral- extended					
018	Written Report 10.00					
019	Letter Of Referral 10.00					
020	Combination Gmhba 014/023					
021	Complete Intraoral Series >10 Films					
022	Single X-Ray					
022.pa	Subsequent Exposure (Dva, Sads,Vic,Wa)					
022bw1	One Bitewing					
022bw2	2 Bitewings On The Day					
022pa	Second X-Ray On The Day					
025	Intraoral X-ray, occ/max/mand					
031	Extraoral Mand. / Maxillary X - Ray	<b>.</b>				
Select All Deselect All Set GST to selected rows Close						

#### **Fee Levels Report**

Location Management > Fees Tab > Operations Menu > Fee Levels Report > Select the location and highlight the Level/s > OK.

This will show all the fees for item numbers in the selected fee level.

Subcategory: Examinations							
ltem	Description	Fee	GST (%)	Mode	Surcharge %		
					Sat	Sun	PHol
011	Comprehensive oral exam	69.30	0	Variable	5.00	0.00	0.00
012	Periodic Oral Examination	55.64	0	Variable	0.00	0.00	0.00
013	Oral exam- limited	63.59	0	Fixed	0.00	0.00	0.00

#### Location Fee Level Comparison Report

Location Management > Reports Tab > Location Fee Level Comparison Report

This will show the fee for each item based on the location where the item is being performed.



	Standard		
Item	Description	Location 3	Second Location
009	Combination 011/023		25.00
010	Combination 012/023	60.00	10.00
011	Comprehensive oral exam	35.00	40.00
012	Periodic Oral Examination	30.00	60.00
013	Oral exam- limited	30.00	30.00

#### NEW: Multi Location - Letter Template management

When working with large multi-location practices the letter templates were shared across all locations, creating an extensive list of categories and templates to be used only for a specific location but visible in all locations

This enhancement allows users to define the locations where letter templates and template categories are visible. The management of letter templates will become easier as users will only see letter templates and template categories which are relevant to their logged in location.

#### **Security**

A security has been added to create a category and template Location Setup > Security tab > Letter: Change template category location (s) and Change letter template location(s)

#### Patient Records > Letters tab

#### Create a Category

In a patient's file click on Template menu > Add New Category

Specify category name:	E.g. Referral Letters
Specify category description:	E.g. Letters to Specialists
Click (Chaw at Calastad Lastians)	Droce (Add All' or bighlight the

ОК

Click 'Show at Selected Locations' Press 'Add All' or highlight the location/s to have access to this category and Press 'Add Selected'



#### **Rename/Change Category Location**

Highlight the category to be renamed/changed > Right click or go to Template menu > Rename Selected Category / Change Category Location.

# **Delete a Category**

Highlight the category to be deleted > Right click or go to Template menu > Delete Selected Category

Proferral Lett
 Delete
 Delete
 Delete
 Delete
 Rename Category/Change Category Locations



#### Create a Template

Highlight the category you want to create the template in > Click on Template menu > Create template

Specify template name: E.g. Ortho

Specify template description: E.g. Referral to Orthodontist

Note: You will notice that only the location selected in the category parameters will be displayed in the template parameters. You

can remove any location as long as you have one or more location active in the 'Show at Selected Location' area

ОК



#### **Rename/Change Template Location**

Highlight the template to be renamed/changed > Right click or go to Template menu > Rename Selected Template / Change Template Location.

#### Delete a Template

Highlight the template to be deleted > Right click or go to Template menu > Delete Selected Template

#### ENHANCEMENT: Multi-location Extend Location Name length in drop lists

When working with multi location environment the surgeries will have a clear view of the full name of each practice displayed in all location drop down menus across all multi location areas of the program. A maximum of 50 characters are allowed per location name

Location Kuring Gai Family & Friends Dental !~ 1 Kuring Gai Family & Friends Dental Surgery

#### ENHANCEMENT: Custom Font Colours in Rich Text Editor to be saved

When using the "Add to Custom Colors" in Rich Text Editor the 'custom colors' are now being saved after closing the selected colour window for Font and Background colours.

When opening any letter/template > Go to Format menu > Click on 'Font Color' > Click on 'Define Custom Colors' > View that under 'Custom colors:' there now appears a new colour > Press 'Ok'



#### When going back to the colour box the custom colors isn't saved



#### CALLCENTRE: Information about build number Call Centre

The build number and Centaur Copyright has been added to the Call Centre database

Click on 📕 icon then click on About at the bottom left hand side of the Appointment Book page

#### CALLCENTRE: The Call Centre renaming in D4W Appointment Cloud

Any area where call centre was displayed has been renamed to D4W Appointment Cloud

