NEW FEATURES AVAILABLE IN Vi5
==== BUILD 4477== Vi5/PB12 ====

ENHANCEMENT: SMS: Managing different SMS Types for Appointments

Not all messages sent from the Appointment Book are Appointment Reminder messages. Therefore, it is not always desirable for the status to be updated into the patient's appointment books after a message has been sent.

New settings have been implemented to PSS to allow users:

- Differentiate an Appointment Notification (i.e. Pre-booked Recalls reminder) from an Appointment Reminder message (i.e. Confirmation of an appointment).
- Easily identify appointments where an Appointment Reminder has been sent.
- Easily exclude these appointments from subsequent Appointment Reminder that were sent.

Example: A Pre-booked Recall reminder is sent a month before the appointment. The system updates the appointment with the Appointment Notification status.

An Appointment Confirmation reminder is sent two days before the patient's appointment. The system replaces the Appointment Notification status with an SMS/E-mail Appointment reminder status.

Setup

- **Default Setup**

  The following areas are set up by default when the upgrade is performed.

  1. Appointment Notification template

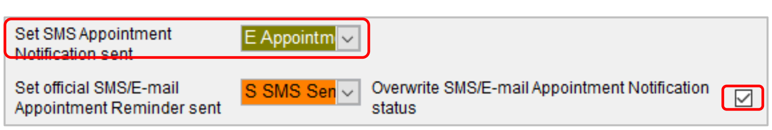
     A new set and type are automatically created for Appointment reminders under **Debtors & Marketing** > **Mail Merge Setup** tab > Select **Mail Merge Category: Appointments**

  2. New Status

     A new status called **Appointment Notification** will be created. Users can make changes by going to **Appointment Book** > **Options** menu > **Setup status types**

  3. Setup Appointment Status

  The new status is linked to **Set SMS Appointment Notification sent,** and the **Overwrite SMS/E-mail Appointment Notification** box is ticked**.**



- **Practice Setup**

  1. Turn on a template for SMS setting

     I. Go to **Location Setup** > **General** tab

     II. Select **Group: Appointment Book**

III. If not already setup change setting **User template for SMS = Yes**

2. Setup template reminder

   I. Go to **Debtors and Marketing** > **Mail Merge Setup** tab

   II. Select **Mail Merge Category: Appointments**

   III. Highlight **All providers** type

   IV. Click the icon to create the SMS template

3. Setup Appointment Message Type

   I. Go to **Appointment Book** > **Options** menu

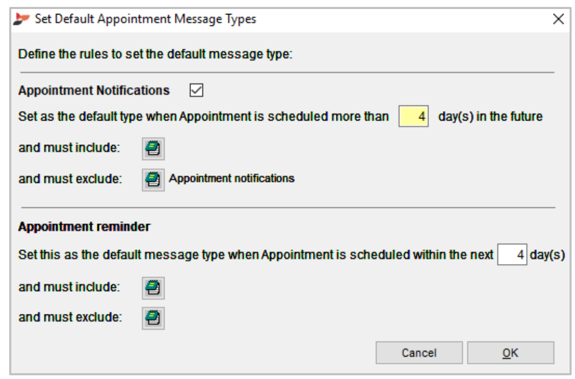
   II. Select **Set Appointment Status types**

   III. Click **Set Setup Appointment Message Type** button

   IV. Tick **Appointment Notifications** box

   V. **Setup this as default message type...:** Enter # days under

   VI. Click **OK** button



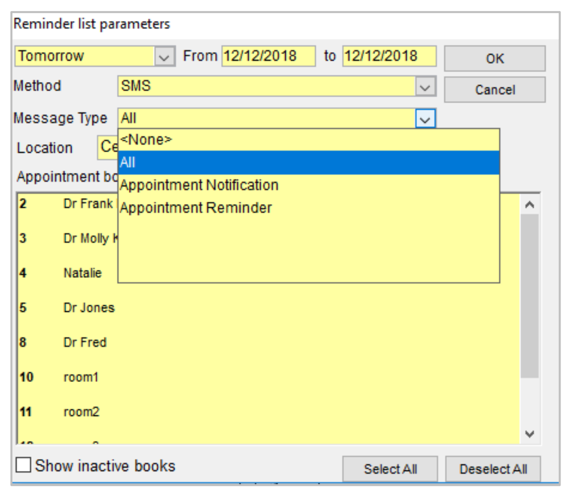
Usage

a) Bulk manual reminder

   I. Go to **Appointment Book** > **Option** menu

   II. Select **Send Appointment Messages…**

   III. Select **Message Type** before sending the reminder



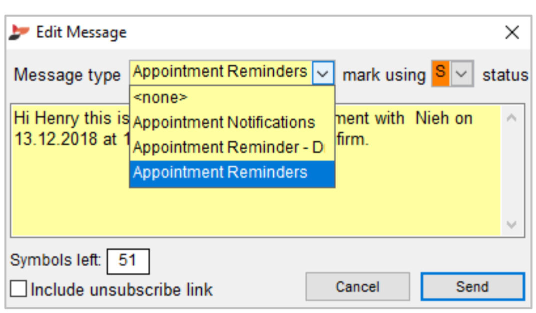
b) Single manual reminder

   I. Go to **Appointment Book** > Right click on a patient's appt

   II. Select **Send** > Chose **SMS/Email**

   III. Select **Message Type**

   IV. Click **Send** button



c) Automation reminder

   I. Go to **Location Management** > **Automation** tab

   II. Highlight the reminder type – i.e. Pre-booked Recalls reminder

   III. Tick **Update the Appointment** and select **with** the status

IV. Tick **overwriting status** and select if **it exists** status

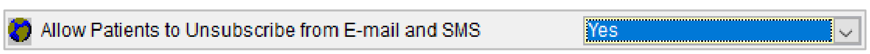
ENHANCEMENT: Make Unsubscribe Settings Visible to all

The unsubscribe general setting became visible to all users on Support & Upgrade. To fully activate this feature, please contact Centaur Software.

For more information on how to use the Unsubscribe/opt-out feature, please refer to the 'Electronic Communications - opt-out functionality' and 'SMS and Email Template editing' how to document.

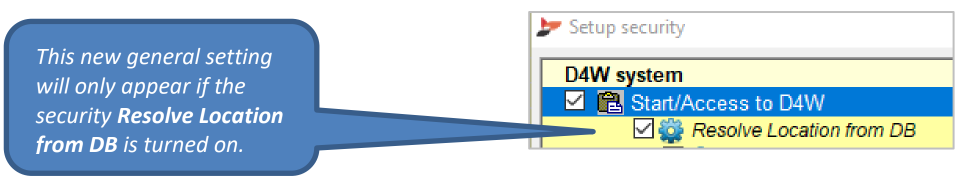
To turn on the feature

1. Go to **Location Setup** > **General** tab
2. Select **Group: eServices**
3. Setup **Allow patient to Unsubscribe from E-mail and SMS** = **Yes**



ENHANCEMENT: Multi-location login – Filter search

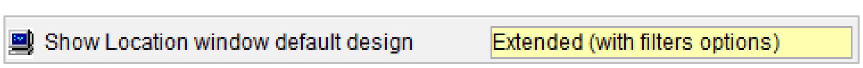
A new general setting has been created to allow multi-location users to search for their location by filtering the search instead of scrolling down the list of available locations.



Turn on setting

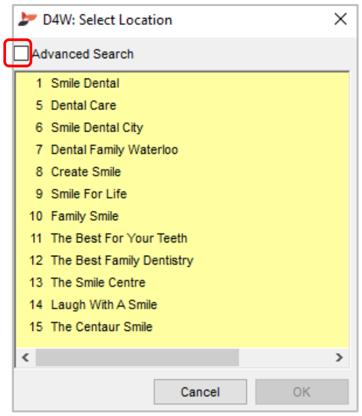
Turn on this setting to allow the users to filter the search when looking for locations.

1. Go to **Location Setup** > **General** tab
2. Select **Group: System Setting**
3. Setup your preference for **Show Location windows default design = Extended (with filters options)**

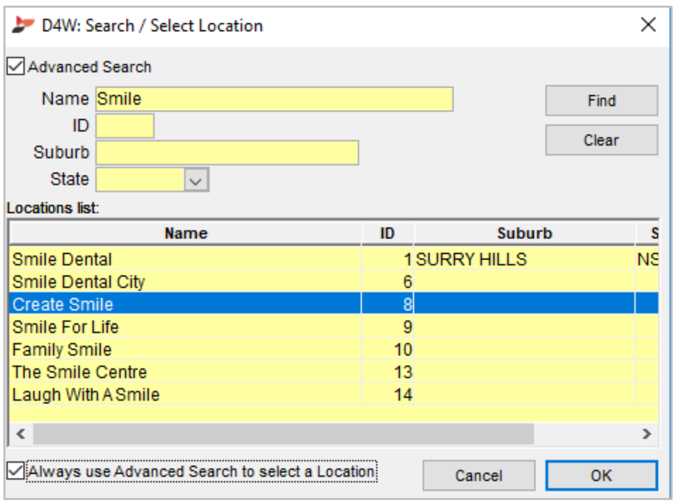


Usage

1. Open D4W
2. Enter **Login** and **Password**
3. Tick **Advanced Search** to show the extend search setting



4. Users can search by **Name**, **ID**, **Suburb**, **State** then click **Find**



5. Tick **Always use Advanced Search to select a Location** if you would like this window to become the default when logging in to D4W

6. Click **OK** button

ENHANCEMENT: Automatically add FTA / UTA item in Patients' Treatment tab

When a patient's appointment is marked as FTA/UTA, the system can automatically add an item that represents FTA/UTA into the patient's Treatment tab.

For more information on how to create an FTA/UTA item, please refer to 'How to setup Items' how to document from training@centaursoftware.com

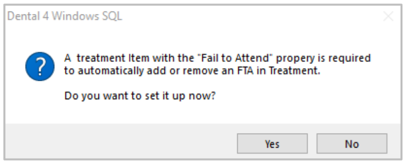
Turn on feature

This feature can be turned on from the **General Setting** or **Appointment Book**

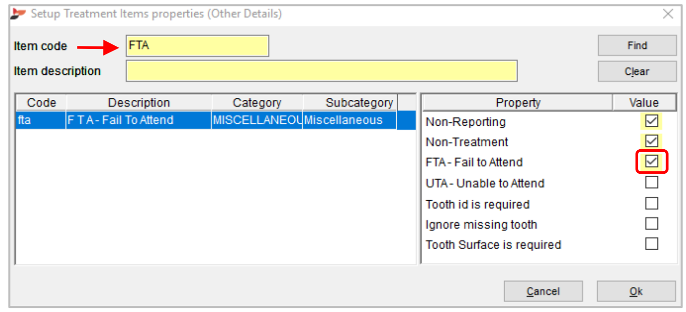
a) General Setting

   1. **Location Setup** > **General tab**
   2. Select **Group: Appointment Book**
   3. Set the **Automatically add/remove FTA item in Px treatment** = YES

4. Click **Yes** to the following message



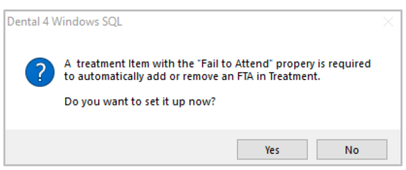
5. **Item code/Item description:** Enter the item or the description that represents FTA
6. Click **Find** button
7. Tick the item property – i.e. FTA
8. Click **OK** button



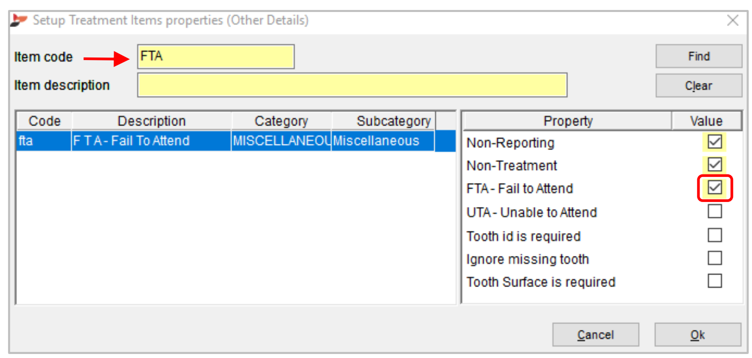
Repeat the above steps for **Automatically add/remove UTA item in Px treatment**

b) Appointment Book

1. **Appointment Book** > **Options** menu
2. Select **Set Appointment Status type**
3. Click a tick in **Automatically add/remove FTA item in Px treatment**
4. Click **Yes** to the following message



5. **Item code/Item description:** Enter the item or the description that represents FTA
6. Click **Find** button
7. Tick the item property - i.e. FTA
8. Click **OK** button



Repeat the above steps for **Automatically add/remove UTA item in Px treatment**

Change of settings

Follow the below steps to make any changes after the initial setup. Repeat the steps for both items.

1. Go to **Location Setup** > **Items** tab
1. Select **Records** menu > Click **Find an item**
2. Enter **Item code** > Click **Find**
3. Click **Go to**
4. Select **Other Details** sub-tab

5. Untick the relevant item to set up the properties again

Reports

The **Items List** will have the FTA/UTA column

1. Go to **Location Setup** > **Items** tab
2. Select **Record** menu
3. Click **Items List**...

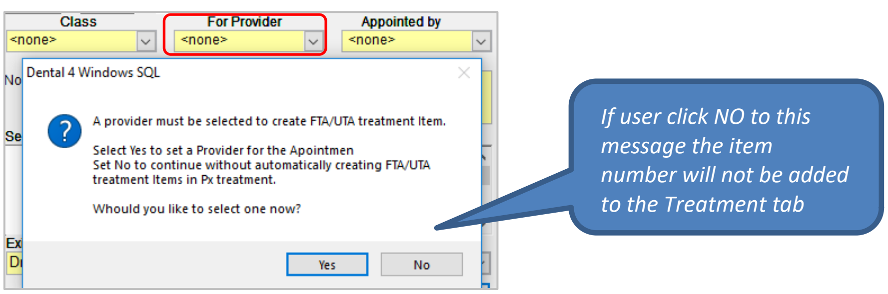
Items

Category: *MISCELLANEOUS*
Sub category: *Miscellaneous*

Item code	Name	Applied Area	Teeth	Show in accounts	Image Position	To TreatPlan	To Treatment	Time value	Trigger Items	Prv.	Non Reporting	Non Treatment	FTA	UTA
uta	U T A - Unable To Attend			☑							☐	☑	☐	☑

General Information

- The notes entered when selecting FTA/UTA won't get transferred to the Treatment notes against the FTA/UTA item.
- If an FTA/UTA status is removed from the patient's appointment, the system will delete the item in Treatment tab and the appointment from the Cancellation list.
- If an FTA/UTA item is deleted from Treatment tab, the system will not remove the relevant status from the Appointment Book or the Cancellation List.
- An appointment can be marked as FTA and UTA within the same day, and the respective items will be entered to treatment however if FTA/UTA is marked twice in the patient's appointment only one FTA/UTA will enter to treatment.
- When working with the multi-location environment the FTA/UTA item/s must be available for all locations.
- The following message will appear if the **For provider** is not selected at the time of marking an appointment as FTA/UTA.



ENHANCEMENT: Active Patients report - Show Total only

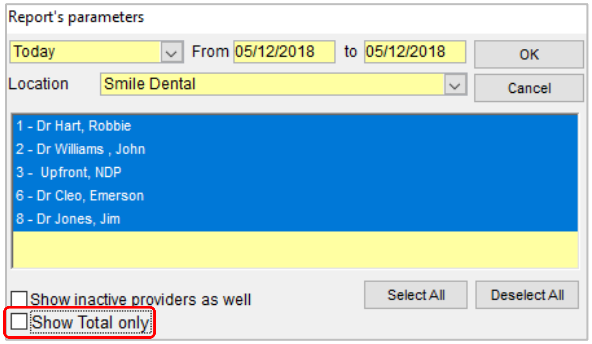
The Active Patient report looks for patients that have had treatment performed in a selected date range. If a new patient sees more than one provider in that period, this patient will be counted for each provider they have seen.

This report has been enhanced to allow the user to also count the total of active patient per location rather than as a breakdown per provider.

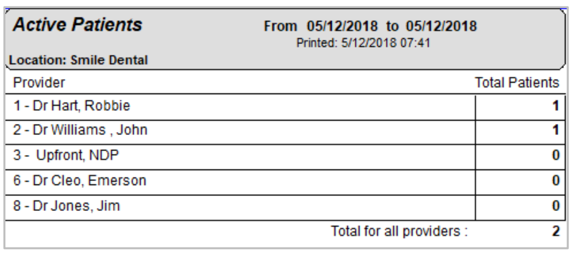
The same day treatment with two different providers

Colin	1		5/12/2018	012	1	Periodic Oral Examination
Colin	2		5/12/2018	615	1	Full crown- veneered- indirect

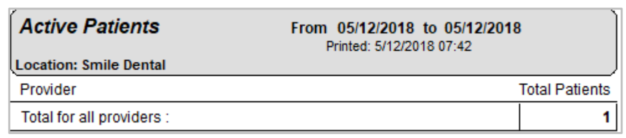
Go to **Location Management** > **Reports** tab > **Active Patients** report



Untick **Show Total only** box (Patient is counted per provider)



Tick **Show Total only** box (Patient is counted per location)



ENHANCEMENT: Ignore Unsubscribe for 'Duty of Care' communications

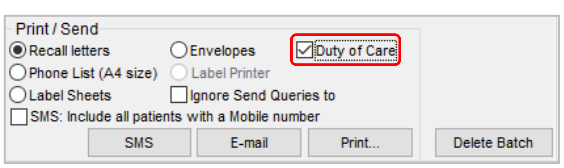
A new feature called **Duty of Care** has been created to differentiate the type of communications sent from the Queries module.

D4W Queries module is used to gather information from different D4W fields to create query lists to be used for Marketing Promotion or Clinical purposes.

When a patient unsubscribes from a communication received from Queries the system can distinguish which type of communication the patient unsubscribed from if the batch was marked as **Duty of Care** the system bypass the patient's request of unsubscribing.

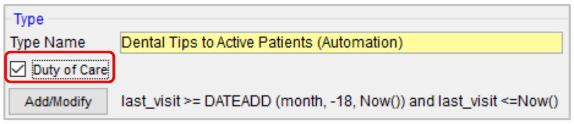
Manual Queries

1. Go to **Debtors & Marketing** > **Queries** tab
2. Create the batch
3. Tick on **Duty of Care** box before sending the batch



Automation Queries

1. Go to **Location Management** > **Automation** tab
2. Click **Queries** sub-tab
3. Tick on **Duty of Care** box before enabling the batch



ENHANCEMENT: Make E-mail address field mandatory

A new general setting has been added to the software to allow practices to make the e-mail as a mandatory field when creating a new patient's file.

To turn on the feature

This feature needs to be set up when the upgrade is performed

1. Go to **Location Setup** > **General** tab
2. Select **Group: Patients**
3. Change the general setting for **Is the patient 'E-mail' field mandatory? = YES**