

## NEW FEATURES AVAILABLE IN Vi5

==== BUILD 4336== Vi5/PB12 =====

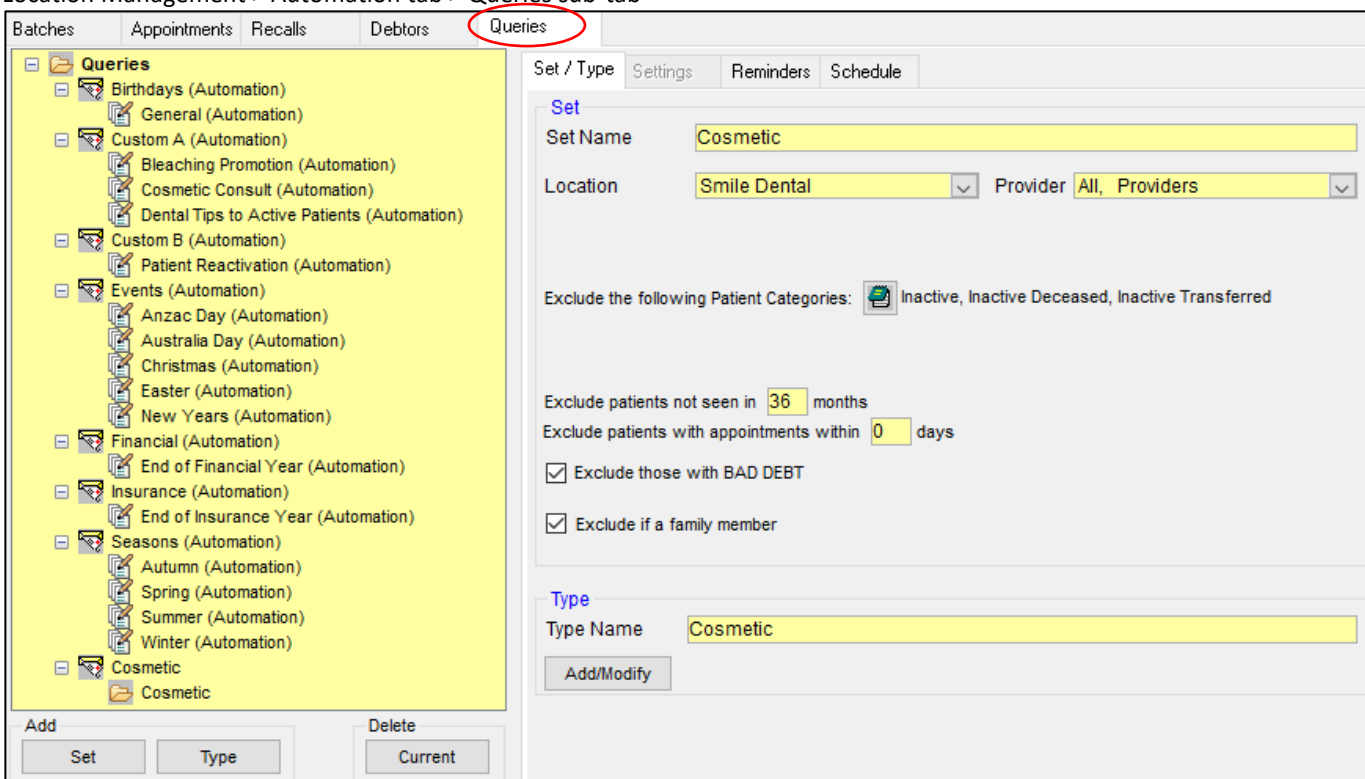
### NEW: Automation: Send Messages about Events and Anniversaries

Dental4Windows has Appointments, Recalls, Debtors and now Queries Automation. The Automation feature allows you to setup Queries reminders to be sent automatically to patients on a set date and time indefinitely. This means SMS and E-mail reminders will automatically be sent and letters and lists will be saved for you to print at a suitable time.

Go to Location Setup > General tab > Group=Automation > Turn on Automation=Yes

### Setup Queries Reminders

Location Management > Automation tab > Queries sub-tab



The screenshot displays the 'Queries' sub-tab in the software. On the left, a tree view lists various query sets under the 'Queries' folder, including Birthdays, Custom A, Custom B, Events, Financial, Insurance, and Seasons. The right pane shows the configuration for a 'Cosmetic' set. It includes fields for 'Set Name' (Cosmetic), 'Location' (Smile Dental), and 'Provider' (All, Providers). There are also checkboxes for excluding patient categories (Inactive, Inactive Deceased, Inactive Transferred), excluding patients not seen in 36 months, excluding patients with appointments within 0 days, excluding those with BAD DEBT, and excluding family members. The 'Type' section shows 'Type Name' as 'Cosmetic' and an 'Add/Modify' button.

All Sets/Types seen in the above image will automatically be created for every database. New Queries can also be created by the following setups

1. Add a new Set (click on: Add [Set] button)
2. Add a new Type (click on:[Type] button)
3. Sub-tab = '**Set/Type**'

#### Set

- a. Enter Set Name
- b. Select Location (if a multi-location environment)
- c. Provider: select a specific provider or leave at All Providers
- d. Exclude the relevant Patient Category: optional
- e. Exclude patients who have not been seen in a certain number of months e.g. 36
- f. Exclude patients who have appointments booked within a certain number of days e.g. 20

- g. Exclude patients with bad debt: optional
- h. Tick to exclude family member: optional

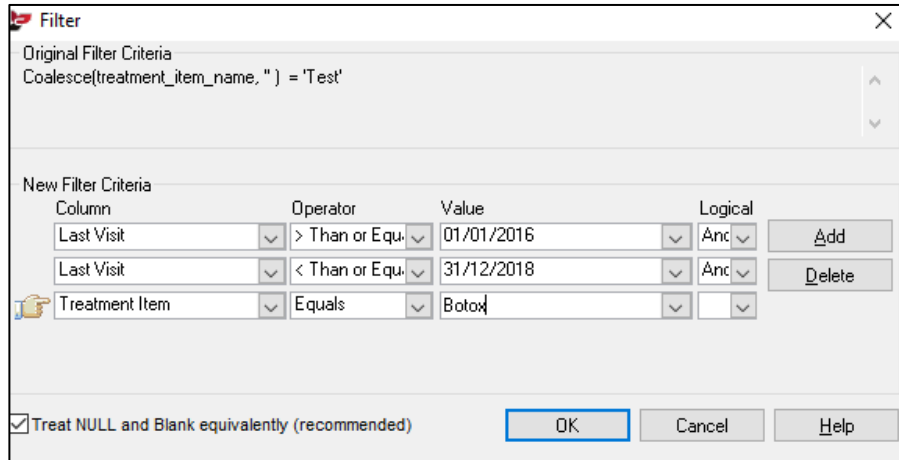
**Type**

- i. Press 'Add/Modify' to create a simple/extended query

**- Simple query**

A filter dialogue box appears. You must now filter to find the criteria you want to meet.

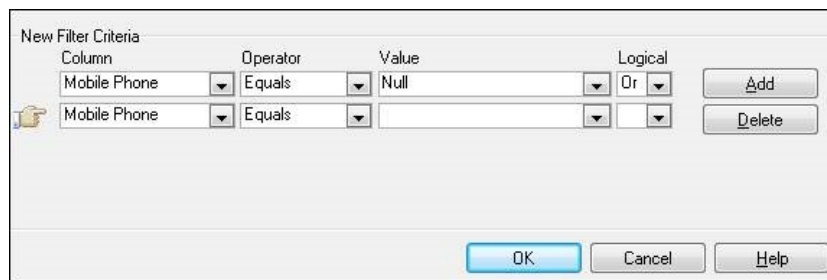
Example: Show me all patients who have a last visit date between 2016 and 2018



- i. Press 'OK' when filter criteria has been selected

**Note:** It is also possible to find out what information is NOT in your database. For example, you want a list of all patients who do not have a mobile number listed so that you can update your Patient Records.

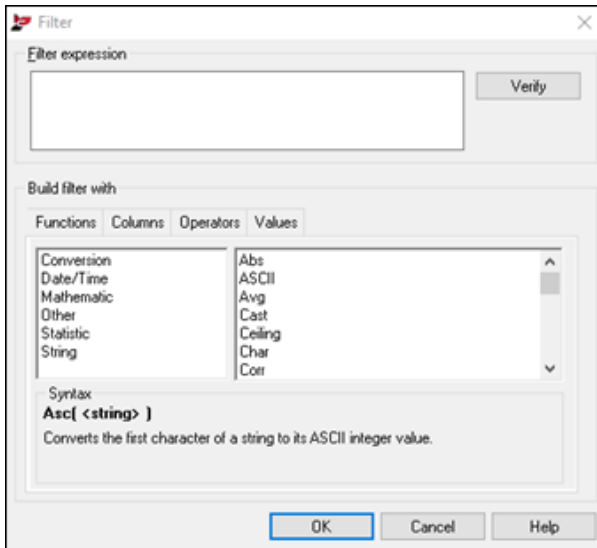
To do this we use Simple Query with criteria as follows:



This can be set for any of the options in the Filter box 'Column' like DOB, Address, E-mail or even Title.

**- Extended Query Wizard Type**

This type is a more advanced form of filter with many options and criteria. A filter dialogue box appears. You must now filter to find the criteria you want to meet.



- i. Click OK when you have selected your filter criteria.


#### 4. Sub-tab = 'Settings'

Settings are only available for the default Birthday query. Here you can enter the parameters for when the reminders will be sent to the patients








##### Reminder for the day of the Patient's birthday

Set / Type	Settings	Reminders	Schedule
Find patients with a birthday			
	less than	1	day(s)
			in the future
			and
			in the

#### 5. Sub-tab = 'Reminders'

Set up the reminder templates for the methods you will be using by clicking on the edit button 

If you are not going to send a certain type of reminder, then select (-) dash. Automation will send a method to a patient based on the patients setting within their file.

Set / Type	Settings	Reminders	Schedule
<input type="checkbox"/> Send communication to family head			
3	Letters Template		  
2	E-mail Template		  
1	Sms Template	Not created yet	
-	Postcard (Label)		
-	Phone Call		

#### 6. Sub-tab = 'Schedule'

It is suggested you setup for reminders to be sent when your practice can best handle potential responses from patients.

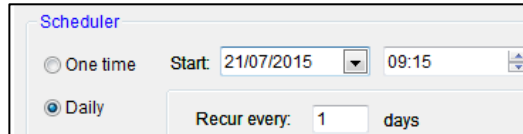
**Note:** the time field is in 24 hour format (e.g. 7pm = 19:00).

- a. Select when the reminders should be sent

One Time: This is to be used when you want to schedule query to be sent only once, but is not recommended for automation purposes.

Scheduler		
<input checked="" type="radio"/> One time	Start: 21/07/2015	09:15

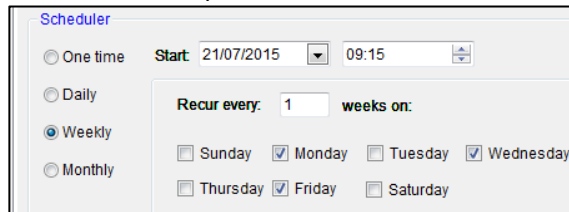
**Daily:** This option is used when the query should be automatically generated daily. Select the start date and time as well as the amount of days it should recur after it is generated. This schedule should be used if you are sending reminders on the day of the patient's birthday



Scheduler

One time    Start: 21/07/2015    09:15  
 Daily    Recur every: 1 days

**Weekly:** This option is used when the query should be automatically generated weekly. Select the start date and time as well as the amount of weeks it should recur after it is generated. Also, select the day of the week it will run.

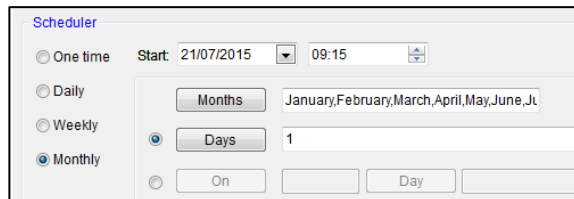


Scheduler

One time    Start: 21/07/2015    09:15  
 Daily  
 Weekly    Recur every: 1 weeks on:  
 Monthly

Sunday     Monday     Tuesday     Wednesday  
 Thursday     Friday     Saturday

**Monthly:** This option is used when the query should be automatically generated monthly. Select the start date and time as well as the months and days the query should be generated.



Scheduler

One time    Start: 21/07/2015    09:15  
 Daily  
 Weekly  
 Monthly

Months    January, February, March, April, May, June, Jt  
 Days    1  
 On    Day

- b. Enable: tick/untick to enable/disable the automation schedule

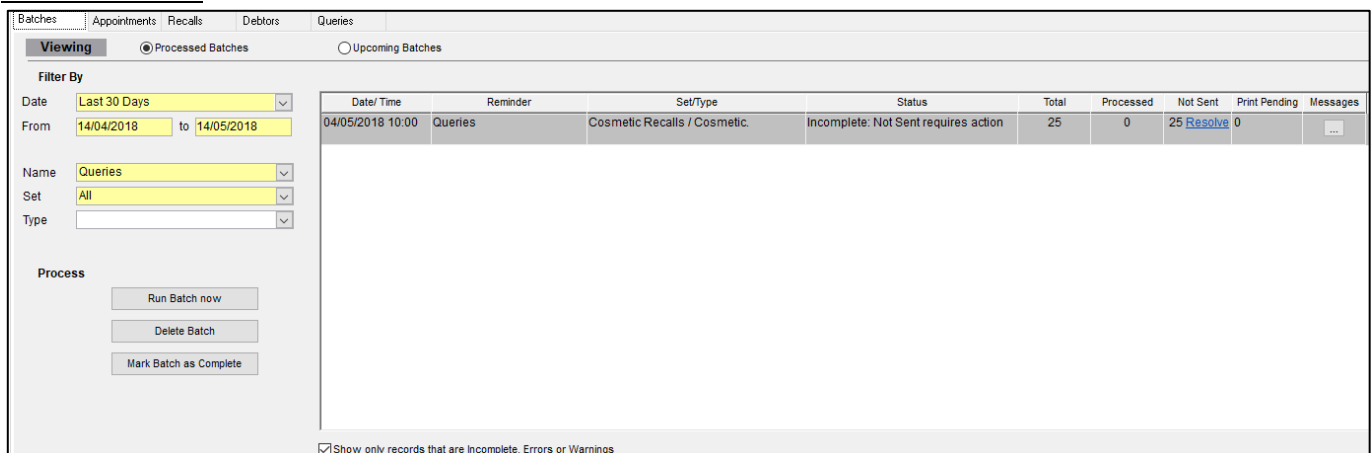
Note: Whenever the 'Schedule' is edited, you must refresh the screen (F5) for the changes to take effect.

## Batches

The Batches sub-tab is a centralised location where a record is kept for all past and future automation batches to be viewed. This area will display Processed Batches, including who was sent a reminder and by what method, e.g. SMS, E-mail or Letter; and Upcoming Batches.

Location Management > Automation tab > Batches sub-tab

### 1. Processed Batches



Batches    Appointments    Recalls    Debtors    Queries

Viewing     Processed Batches     Upcoming Batches

Filter By

Date: Last 30 Days

From: 14/04/2018 to 14/05/2018

Name: Queries

Set: All

Type:

Process

Run Batch now

Delete Batch

Mark Batch as Complete

Date/Time	Reminder	Set/Type	Status	Total	Processed	Not Sent	Print Pending	Messages
04/05/2018 10:00	Queries	Cosmetic Recalls / Cosmetic	Incomplete: Not Sent requires action	25	0	25 <a href="#">Resolve</a>	0	...

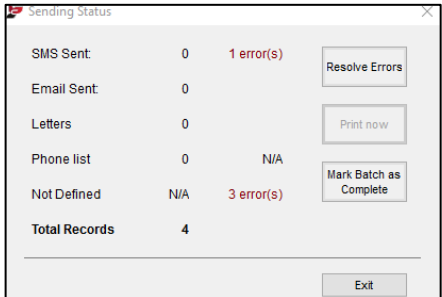
Show only records that are Incomplete, Errors or Warnings

a. Filter By

Date	Select the date to show on display
Name	All Appointments, Recalls, Reminders to the Debtors or <b>Queries</b>
Set	This will change depending on what is selected in the 'Reminder' option
Type	This will change depending on what is selected in the 'Set/Type' option

b. Process

Options are only visible when a batch with the status "Failed to run" is selected.

Run Batch now	<p>You can run a batch now if the status of the batch is 'Failed to run' or 'Empty Batch'</p>  <p>After clicking on this button, the batch will be run and you will end up at the Sending Status screen. At this point:</p> <ul style="list-style-type: none"> <li>- If all records passed, click on Exit and the batch will be marked as Complete</li> <li>- If errors occurred, click on 'Resolve Errors'</li> </ul> <p>By pressing 'Exit' the batch will contain a status of 'Incomplete: Not Sent requires action'</p> <p>You can click on 'Mark Batch as Complete' without resolving the issue</p>
Delete Batch	<p>You can only delete a batch that contains the following status:</p> <ul style="list-style-type: none"> <li>- Failed to Run</li> <li>- Empty Batch</li> </ul>
Mark Batch as Complete	<p>The batch can be marked as complete when the error in a specific batch has been fixed.</p> <p>If you complete a batch before fixing the error, a message will appear asking if you wish to ignore the errors and complete the batch</p>

c. Batch View

Date/Time	Date and time the batch was run
Reminder	Type of reminder that was generated
Set/Type	Indicates which set/type
Status	Indicates the reason why a batch failed to run
Total	Indicates how many records are in that batch
Processed	Indicates how many records within the batch were processed Untick 'Show only records that are Incomplete, Errors or Warning box to see all batches (complete and incomplete)
Not Sent	<p>Indicates that action needs to take place. Click on the word 'Resolve' to open the following box.</p> <ul style="list-style-type: none"> <li>- You can see the reason for failure under the status column</li> <li>- Right click on the patient's name to go to the patient's file to fix the issue while the message box is still opened</li> <li>- Press 'Reprocess batch' when all the issues have been manually fixed and you are ready to run the batch</li> </ul>

Dental 4 Windows SQL Messages (In error)

Batch Details: Date/Time 04/05/2018 10:00, Set/Type Cosmetic Recalls / Cosmetic.

Filters: Method <none>, Letter; Status Incomplete

Viewing: 25 / 25

Date/ Time Sent	Recipient	Message	Method	Status
	Matos, Ana, #37	Queries, Matos, Ana, #37	Letter	Incomplete: No Letter template
	Smith, Mr James, #18	Queries, Smith, Mr James, #18	Letter	Incomplete: No Letter template
	Smith, Amtt, #22	Queries, Smith, Amtt, #22	Letter	Incomplete: No Letter template
	Plese, Miss Squeeze, #24	Queries, Plese, Miss Squeeze, #24	Letter	Incomplete: No Letter template
	Potestas, Ms Christina, #25	Queries, Potestas, Ms Christina, #25	Letter	Incomplete: No Letter template
	Smith, Janes, #34	Queries, Smith, Janes, #34	Letter	Incomplete: No Letter template
	Percy, Alison, #35	Queries, Percy, Alison, #35	Letter	Incomplete: No Letter template

Print list | Reprocess batch | Exit

Print Pending

The Print Pending column indicates all records that link to a patient that has 'Sent To' parameters that have Letter or Telephone as their method of communication.

After clicking on 'Resolve' or 'Print', you will see the Print Pending dialog:

Print Pending

**Letters**  
 Patients with Letters as the communication method: 4 Not Printed

Letters [Print] [Mark as Printed]

Labels [Print]

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**Telephone**  
 Patients with Telephone as the communication method: 0 Not Printed

Phone list [Print] [Mark as Printed]

[Exit]

Here you can Print/Reprint or even just Mark as Printed.

Messages

You can see all the messages from a failed or complete batch and look at the status or reprocess the batch

Dental 4 Windows SQL Messages (All)

Batch Details: Date/Time 04/05/2018 10:00, Set/Type Cosmetic Recalls / Cosmetic.

Filters: Method <none>, Letter; Status Incomplete

Viewing: 25 / 25

Date/ Time Sent	Recipient	Message	Method	Status
	Matos, Ana, #37	Queries, Matos, Ana, #37	Letter	Incomplete: No Letter template
	Smith, Mr James, #18	Queries, Smith, Mr James, #18	Letter	Incomplete: No Letter template
	Smith, Amtt, #22	Queries, Smith, Amtt, #22	Letter	Incomplete: No Letter template
	Plese, Miss Squeeze, #24	Queries, Plese, Miss Squeeze, #24	Letter	Incomplete: No Letter template
	Potestas, Ms Christina, #25	Queries, Potestas, Ms Christina, #25	Letter	Incomplete: No Letter template

Print list | Reprocess batch | Exit

d. Incomplete Only

Show only records that are Incomplete, Errors or Warnings

This is ticked by default. Untick to see a list with a combination of incomplete and complete batches. The Incomplete Only option does not show in viewing Upcoming Batches.

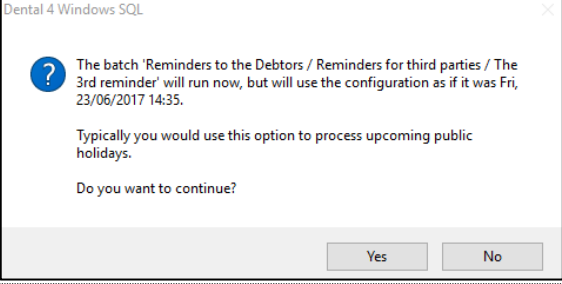
2. Upcoming Batches

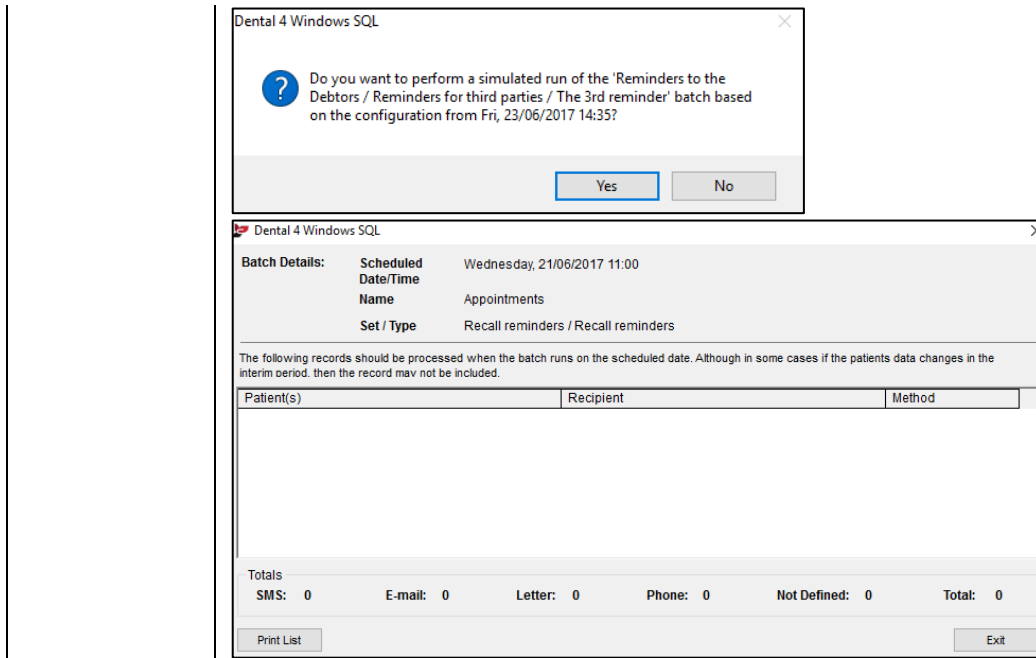
Viewing			
<input type="radio"/> Processed Batches		<input checked="" type="radio"/> Upcoming Batches	
<b>Filter By</b>			
Date	Next 30 Days		
From	21/06/2017 to 20/07/2017		
Name	All		
Set			
Type			
<b>Process</b>			
Run Batch now			
Simulate Batch			
Scheduled Date/Time	Name	Set / Type	
Wed, 21/06/2017 11:00	Appointments	Recall reminders / Recall reminders	
Wed, 21/06/2017 13:45	Appointments	General Messages / New Patients	
Thu, 22/06/2017 11:00	Appointments	Recall reminders / Recall reminders	
Thu, 22/06/2017 13:45	Appointments	General Messages / New Patients	
Fri, 23/06/2017 00:00	Appointments	Treatment Completed messages / Extractions	
Fri, 23/06/2017 11:00	Appointments	Recall reminders / Recall reminders	
Fri, 23/06/2017 13:45	Appointments	General Messages / New Patients	
Fri, 23/06/2017 14:05	Reminders to the Debtors	Reminders for third parties / The 1st reminder	
Fri, 23/06/2017 14:15	Reminders to the Debtors	Reminders for patients / The 2nd reminder	
Fri, 23/06/2017 14:20	Reminders to the Debtors	Reminders for third parties / The 2nd reminder	
Fri, 23/06/2017 14:30	Reminders to the Debtors	Reminders for patients / The 3rd reminder	
Fri, 23/06/2017 14:35	Reminders to the Debtors	Reminders for third parties / The 3rd reminder	

a. Filter By

Date/From	Select the date range for the upcoming batches
Name	All Appointments, Recalls or Reminders to the Debtors
Set	This will change depending on what is selected in the 'Name' option
Type	This will change depending on what is selected in the 'Set' option

b. Process

Run Batch Now	Is used for running a batch for a public holiday
	
Simulate Batch	You can simulate a batch to look up the patient, recipient and method to be sent in this upcoming batch



#### **ENHANCEMENT: Automation: Speed up load time of batches**

The speed for uploading a batch within the Automation features has been enhanced to provide a faster usability of the feature.

#### **ENHANCEMENT: Query Tab Filters (Simple Query Wizard vs Create user-defined wizard > Change using Simple Wizard)**

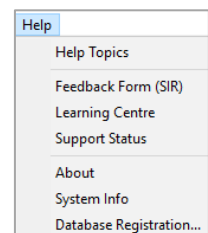
To provide consistency between 'Simple Query Wizard' and 'Create user-defined query' filters; the below changes have happened to D4W

- Renamed 'Provider Treatment Item' to 'Treatment Provider Code'
- Renamed 'Nhi ID' to 'NHI ID'
- Renamed 'Midicare ID' to 'Medicare ID'
- Added 'Provider User Name' to all Query types
- Added 'Treatment Item' to the Create user-defined query list
- Added 'NHI ID' to the Create user-defined query list
- Added 'Medicare ID' to the Simple Query list

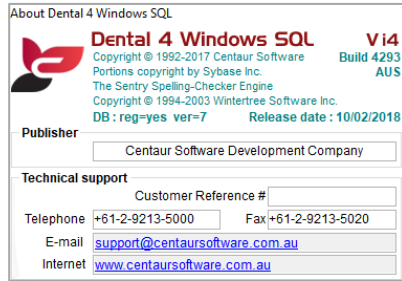
#### **ENHANCEMENT: Links within D4W - Support Status for all clients and Feedback Form and Learning Centre for Cloud/Terminal Server clients**

To improve D4W customer interaction with our clients, the following areas will be accessible straight from D4W/PSS.

1. Feedback Form (SIR)  
This form is used to collect suggestions and feedback from clients on improvements within the software.
2. Learning Centre  
The Learning Centre is an area where all clients on Support and Upgrade have access to a range of learning materials. You can access the Learning Centre from Centaur website or now straight from D4W.
3. Support Status  
Here you will find the statuses of all Centaur Software services, including planned maintenance.
4. Centaur website  
Centaur website has been embedded into our copyright and found under 'About'







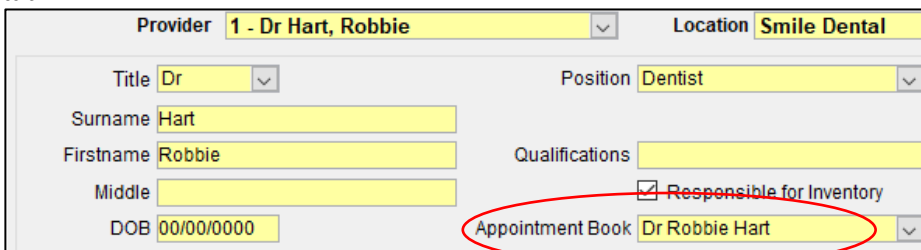
**ENHANCEMENT: Multi location: Improve performance in Fees Tab**

Enhancements have been made in the Fees tab to improve the performance of this feature for clients on Multi Location

**ENHANCEMENT: eChat message when a patient arrives**

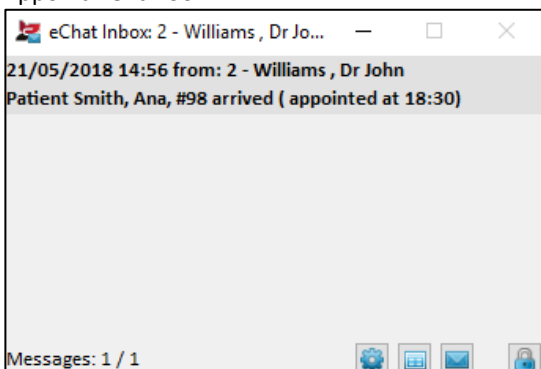
The system has the ability to send an eChat message when a patient is marked as arrived in the Appointment Book.

The feature is controlled by the link between the provider and his/her Appointment Book under Location Management > Providers tab.



To turn on this feature go to: Location Setup > General tab > Group: Communication setting > eChat: Notify about Patient arrived = Yes

The provider needs to be logged in to eChat to receive the following message when a patient is marked as arrived on his/her Appointment Book



*For more information on how to use eChat, please refer to 'eChat' how to doc*

*Previously released build features can be found on our website within the 'Learning Centre'. Contact our Customer Service department for your login details. [www.centaursoftware.com.au](http://www.centaursoftware.com.au)*