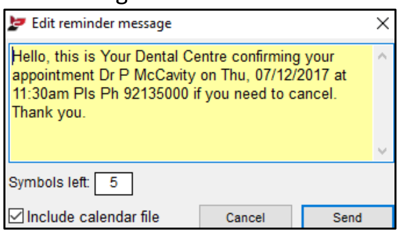
NEW FEATURES AVAILABLE IN Vi4

==== BUILD 4272== Vi4/PB12 ====

ENHANCEMENT: <u>Appt Reminders: Calendar File attachment and Enhancements</u>
A few cosmetic changes have been made to this feature.

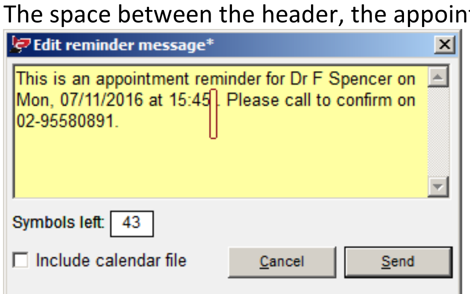
When the upgrade is performed the cosmetic changes will be appear as below:

1. **Message Reminder**
   The message within the reminder will be exactly the same as the body of the email

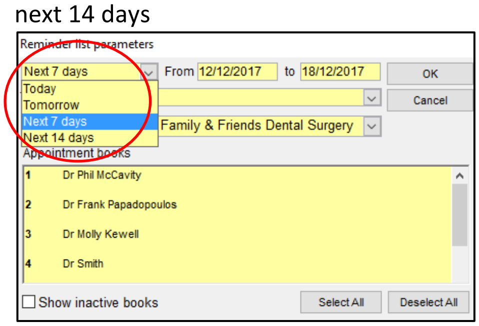


2. **Email subject**
   The subject of the email and reminder will be displayed as: Reminder from %Title% %Prv1stName% %PrvSurname%

3. **Space**
   The space between the header, the appointment data and footer has been removed



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



ENHANCEMENT: <u>SMS Web - Improve Messages sent logic when creating a new patient in Appointments</u>
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

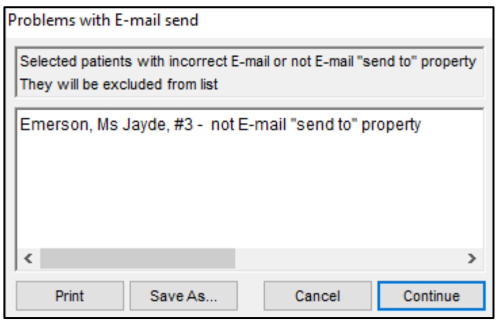
To turn on this setting go to: Location Setup > General tab: SMS Setting > Send SMS on Appointment Reminders

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

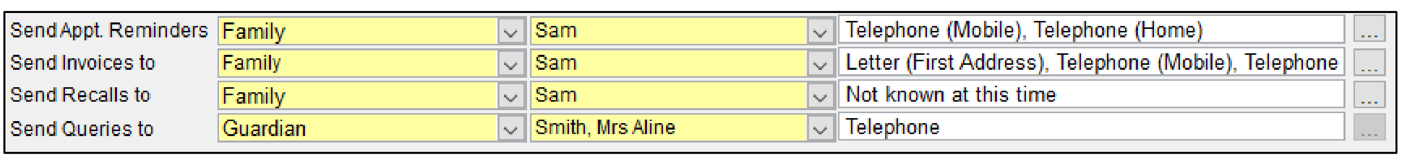
ENHANCEMENT: <u>Automation: Improve Send to Improve "Send To"</u>
The D4W system has been revised to allow multiple communication methods to be sent to a patient. The enhancement of this feature will also have the ability to send reminders to family members, insurance, guardians and third parties.

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.

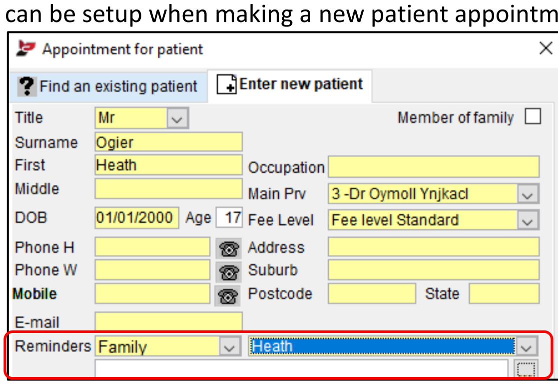
With this enhancement users won't receive the following message if multiple methods of communication are selected.



<u>Patient Records > Patients tab > Address sub-tab</u>
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



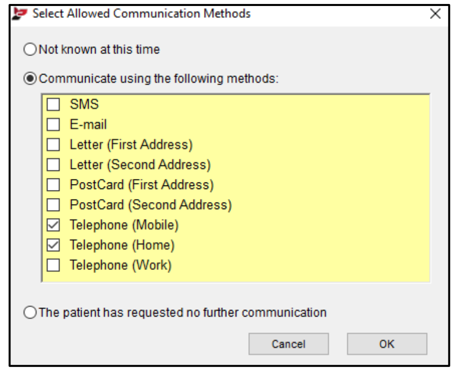
The Appointment Reminders feature has been moved from 'Recalls/Referrals' to 'Address' sub-tab. The Appointment reminders still can be setup when making a new patient appointment



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

Communication Methods

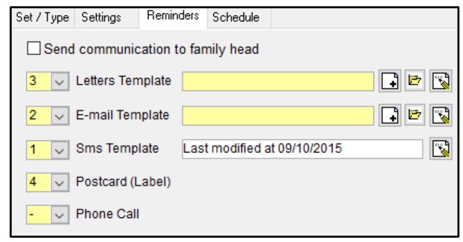
The user has three options to select from when setting up the patient file



1. Not known at this time (by default)
2. 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.



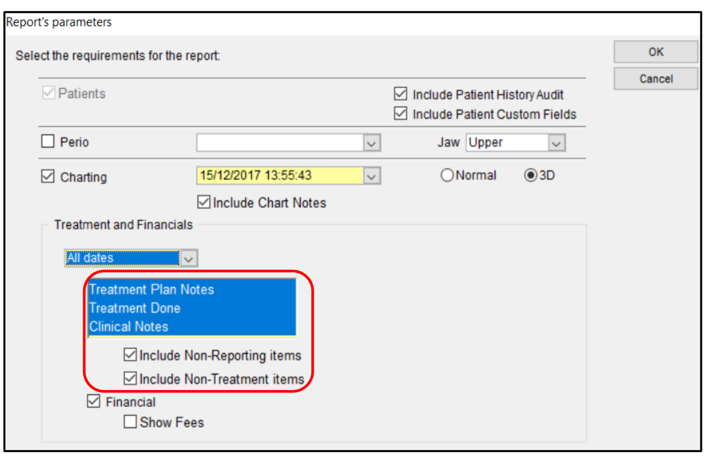
- Tick 'Send communication to family head' if required
  Relates to the "Send Recall To" field within the Patients tab. If this is ticked it will ignore those settings and send the recall reminders to the family head.
- Select the order for each method from the drop down list
  If a communication method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

ENHANCEMENT: <u>Improve Non-Treat Function in Print Entire Record</u>

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



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

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*

NEW: <u>Medicare Computerized Prescription</u>
This feature will give dentists the ability to print out prescriptions from Dental4Windows (D4W).

The users must use the government supplied pre-printed prescription stationery. One side of the page is the 'Pharmacist/Patient' copy and the other is 'Medicare/DVA' copy. Dentists will order computerised prescription from "Human Services – Prescriptions DEPT" from the 1st of Dec 2017.

For more information on PBS please visit *https://www.humanservices.gov.au/organisations/health-professionals/forms* website

Activation/Installation

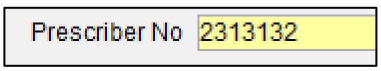
No activation is required by Centaur or users to turn on this feature. The users however need to be on build 4146 or higher.

Setup

The following areas can be setup by the users where relevant.

1. Prescriber Number

   Location Management > Provider tab > Enter provider prescriber number

2. Provider

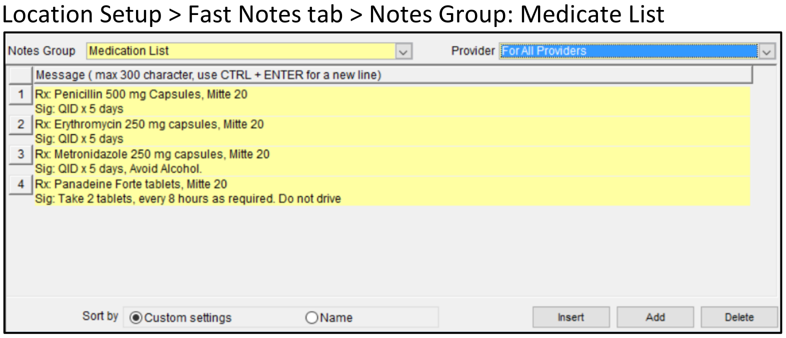
   Provider's name will be auto populated when creating the prescription

3. Surgery details setup

   Location setup > Location tab > Enter the surgery's address, phone number to be auto populated when creating a prescription

4. Create Medication List

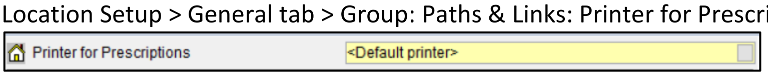
   Location Setup > Fast Notes tab > Notes Group: Medicate List

   The medications can be added in Fast Notes per provider or for all providers (choose from drop down list) > Press 'Add' to add the medications

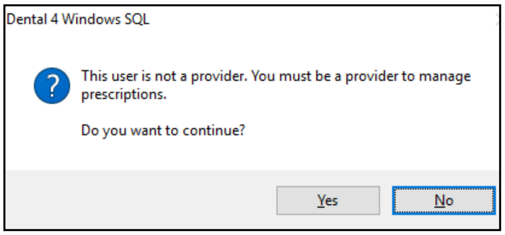
5. Setup Printer
   A new General Setting has been added to store the printer that will be used for prescription printing for those users that will have a dedicate printer for prescriptions only

   Location Setup > General tab > Group: Paths & Links: Printer for Prescriptions

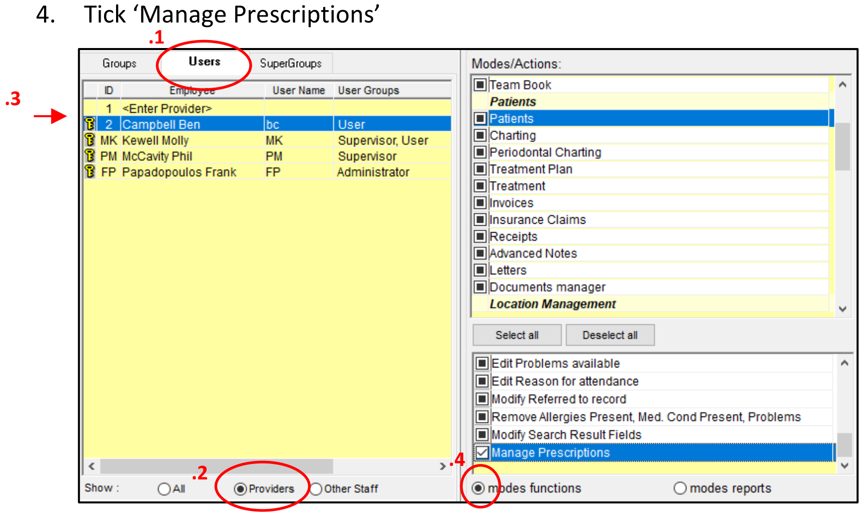
6. Security

Security has been added as default and mandatory to those allowed to write prescriptions.
Only providers should have access to this feature. If a staff has access to this area and uses their login and password the below messaging will appear when creating a prescription.



Setup Security

1. Go to Location Setup > Security tab
2. Under ‘Users’ tab > Click on Provider to show all providers
3. Highlight provider to have access to the write prescription
4. Tick ‘Manage Prescriptions’

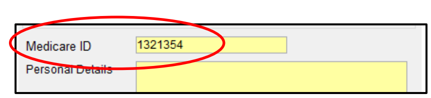


For more information on how to work on security, please refer to ‘Security_ How to setup’ how to doc

Patient’s file setup

The patient’s title, surname, first name, full address and Medicare ID number must be entered in the patient’s file to be auto populated when creating a prescription.

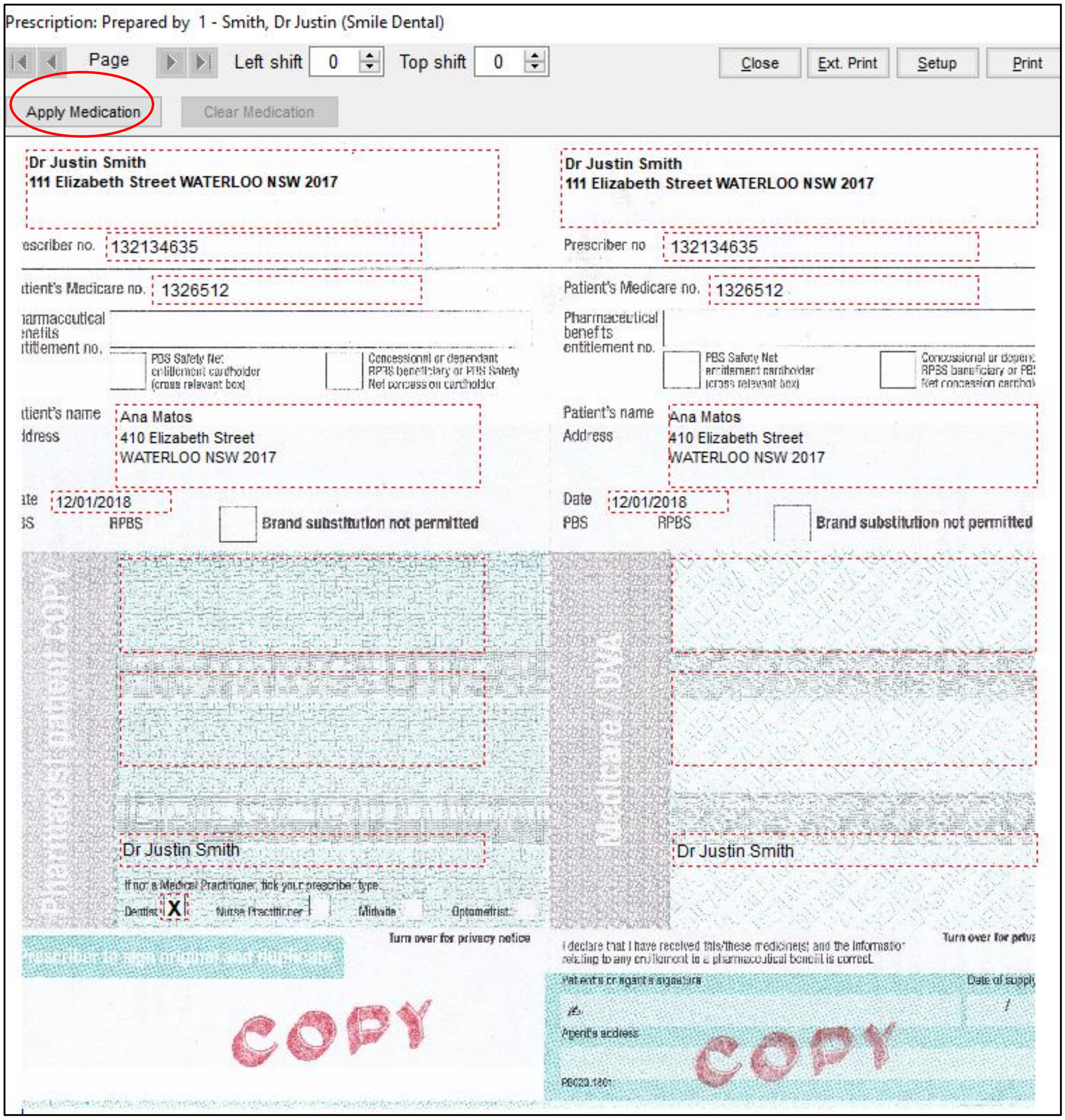
Patient Records > Patient Details tab > Address sub-tab. The Medicare ID number must be entered under Insurance/Various sub-tab



Usage

Create Prescription

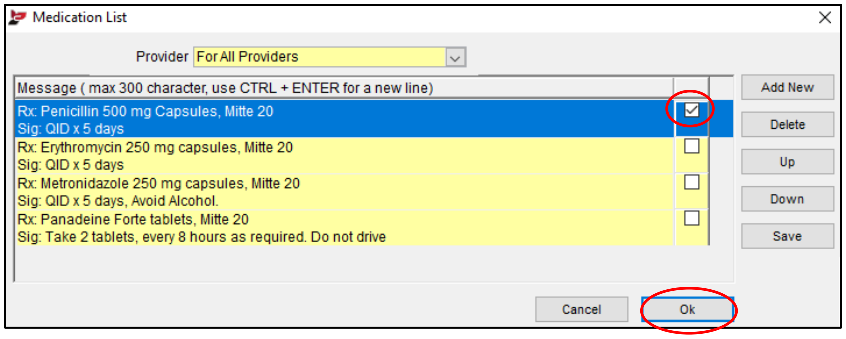
1. Go to Patient Records > Patient Details tab
2. Find/View menu
3. Create Prescription
4. Click on ‘ Apply Medication’



5. Medication List

   The medications entered in Fast Notes will appear in the Medication List however the provider can also add or edit further medications or instructions for the patient/s. A maximum of 2 medications can be prescribed per prescription sheet

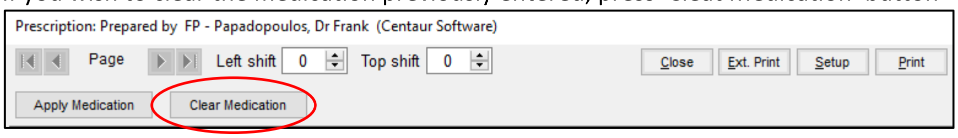
   Tick the box against the medication to be prescribed > Press ‘Ok’



If you wish to add a new medication, press 'Add New', type the medication, press 'Save' before ticking the box and pressing 'Ok' to transfer the medication to the prescription

6. Clear Medication

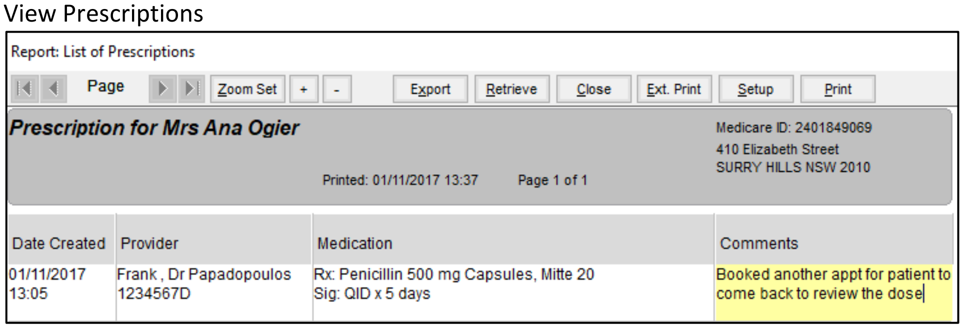
   If you wish to clear the medication previously entered, press 'Cleat Medication' button



View Prescriptions

The prescription can be viewed after it has been printed. Any extra information can be added under the 'Comments' box

1. Go to Patient Records > Patient Details tab
2. Find/View menu
3. View Prescriptions

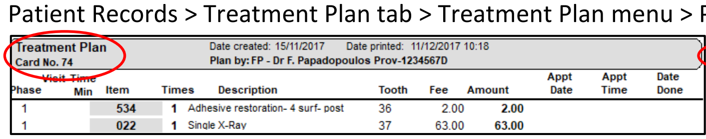


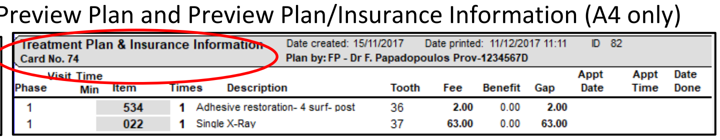
Note: A prescription can't be deleted after it has been printed.

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)





ENHANCEMENT: Stepped 3D Charting / 3D Skull - Ideal for Remote Operating Environments

The functionality of the 3D Charting and Skull has been enhanced to provide a version of 3D charting which uses less computing resources. This will improve the performance of 3D charting. It is suitable for D4w Cloud users, Users in Terminal Server environments and users with locally installed D4w versions looking to reduce the computer resources used by 3D Charting.

Due to some of these environments generally having limited bandwidth and limited CPU/GPU resources, we have introduced 'stepping' performance rather than live rendering for a better user experience especially in Hosted and Terminal Server environments. With this change a new general setting has been added to D4W.

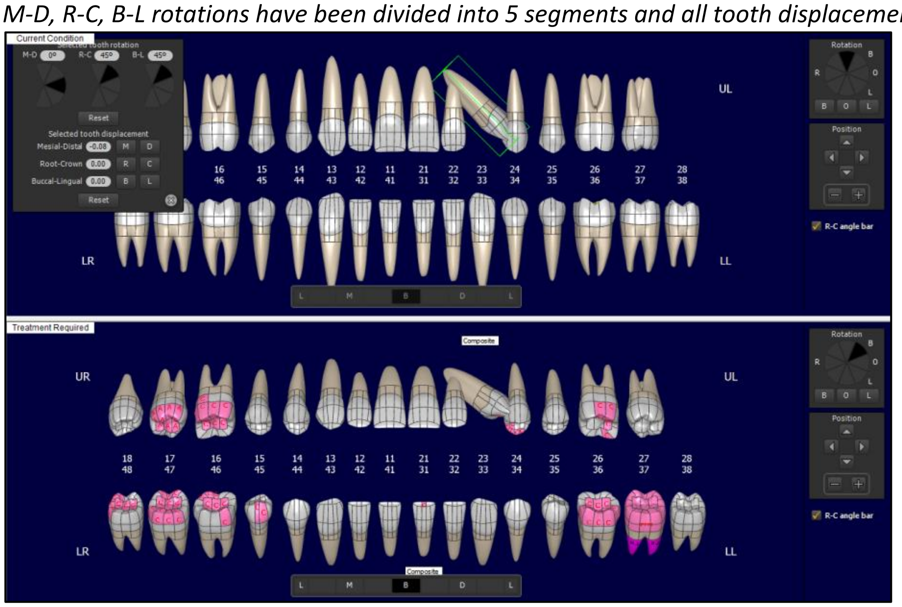
Location Setup > General Setting > Group: Charting: Stepped 3D Chart = Yes

Patient details > 3D Charting tab

1. Rotation Wheel
   The rotation wheel has been divided into 8 equal segments

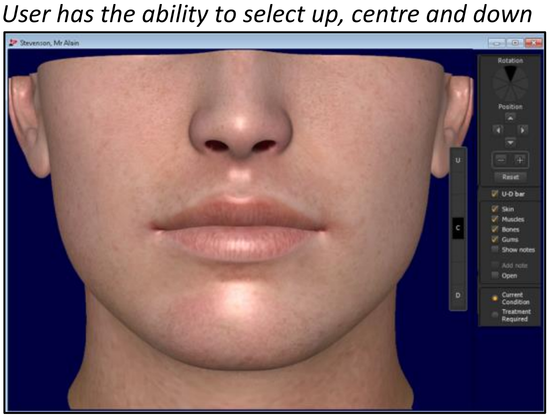
2. Preset Views
   User has the ability to select a number of preset views which rotate the teeth exposing the buccal, mesial, distal and lingual surfaces of teeth visible on a patients chart

3. Select Tooth Function
   M-D, R-C, B-L rotations have been divided into 5 segments and all tooth displacements has the increments of 0.4



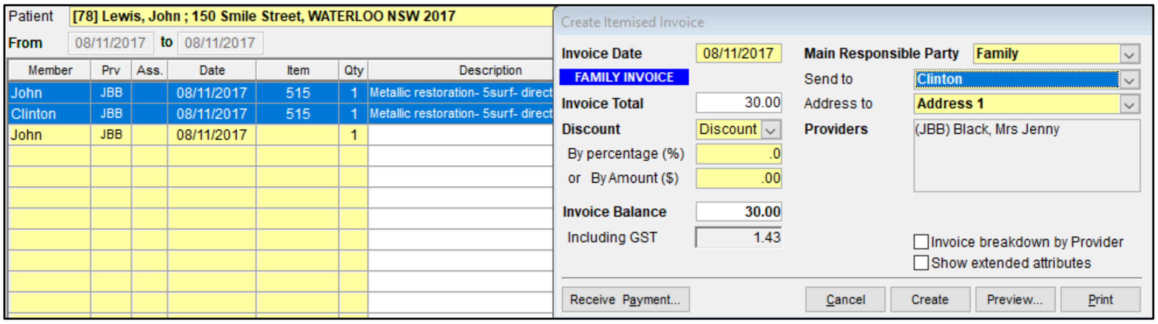
4. Select One Tooth Mode
   User has the ability to select a number of preset views which rotate the teeth exposing the buccal, mesial, distal and lingual surfaces of teeth visible on a patients chart

5. Skull
   User has the ability to select up, centre and down



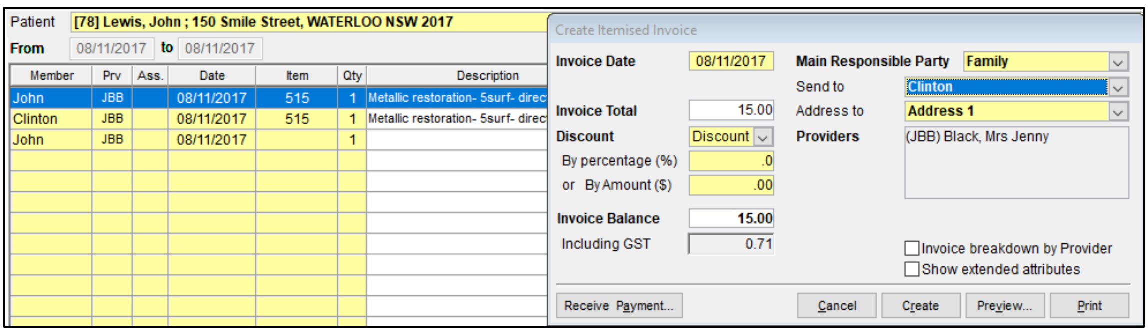
ENHANCEMENT: Invoice & Receipt Reports - Automatically Breakdown Invoice into separate Patients

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.



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



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.).

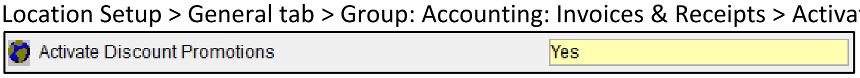
Creation of a seamless discounting process to enable easy creation and use of promotions without:
- Creating new item codes
- Manual entry of fees in Treatment Details tab

Activation

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

   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.

   - ☑ Promotions
     - ☑ *Add / Copy Promotion*
     - ☑ *Modify Promotion*
     - ☑ *Delete Promotion*

Setup

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

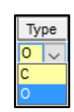
Location Management > Promotions tab

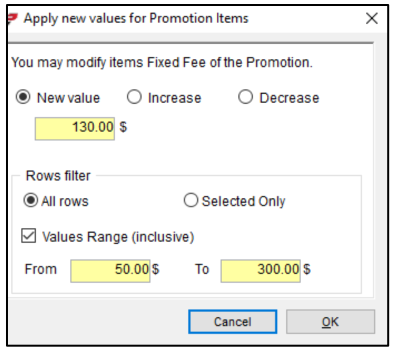
Create a Promotion

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

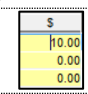
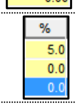
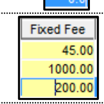
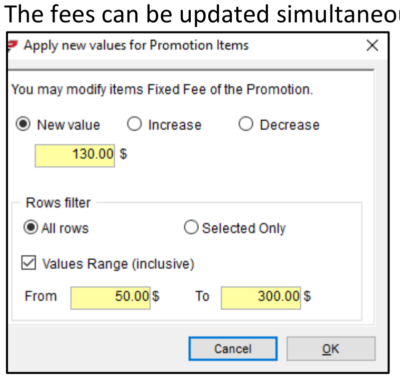
Note: If you are working with multi-location environment the location must be selected before creating a promotion considering that you may not be working in the default location.

a. Package

Promotion Details	
Type	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	
Type	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
Type	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 
$	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

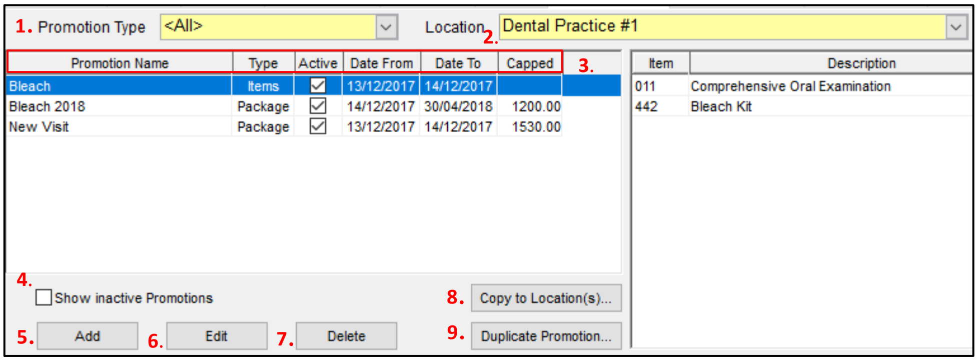
	Fee for "O" items can be = 0
Apply Values	Users can update the fees by creating a new value and increase or decrease an existing fee The fees can be updated simultaneously, by selected rows or a value range 

b. <u>Items</u>

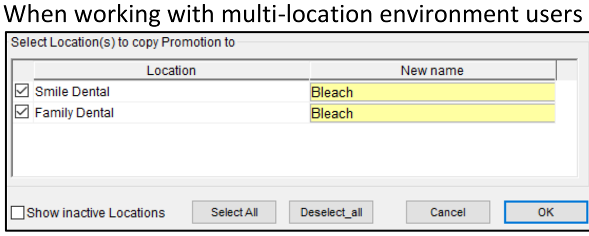
Promotion Details	
Type	Select the type = Items
Name	Type the promotion's name
Amount	When choosing 'Amount' the users will enter the $ amount to be deducted from the scheduled fee for each item included in this promotion
Percent	When choosing 'Percent' the users will enter percentage of $ value to be 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 included in this promotion
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 but unticking the 'Activated' box and the finish date will be changed to today's date
Promotion Items	
Type	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/s
$	If 'Amount' was selected, users will enter the amount here 
%	If 'Percent' was selected, users will enter the percentage here 
Fixed Fee	If 'Fixed fee' was selected, users will enter the fees here. The original fee must be higher than the promotion fixed fee 
Apply Values	Users can update the fees by creating a new value and increase or decrease an existing fee The fees can be updated simultaneously, by selecting rows or a value range 

View Promotion

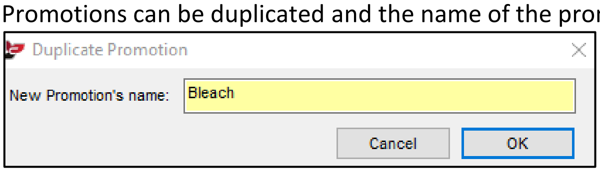
<u>Location Management > Promotions</u>



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



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

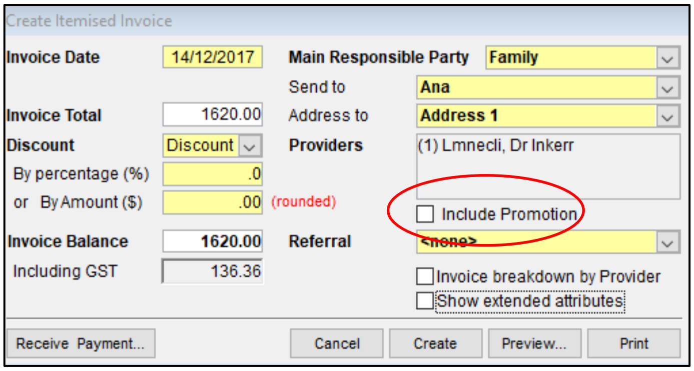


Usage

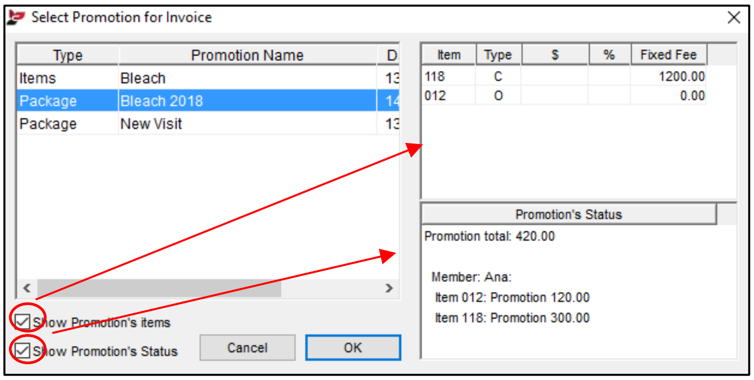
Promotion applied to an invoice in time of creation (F2)

<u>Patient Details >Treatment tab</u>

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

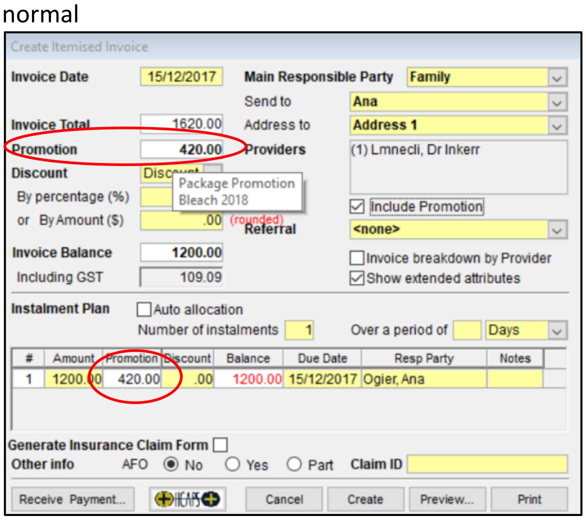


4. Under 'Select Promotion for Invoice' [window] highlight which promotion to use in this invoice



Note: Only 1 promotion can be applied per invoice

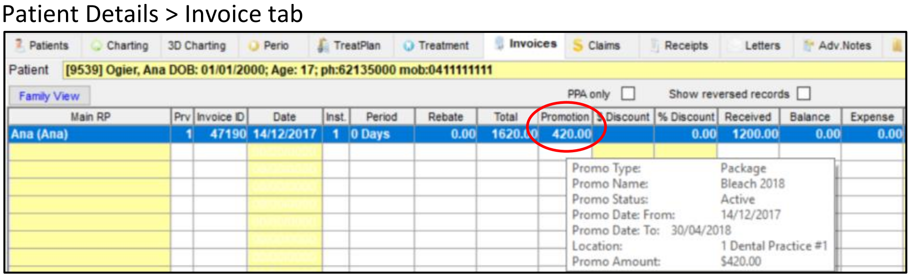
5. After the promotion is applied the fee in treatment will be adjusted and the user can complete the invoice/receipts as normal



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



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. <u>Accounting: Invoices and Receipts over a period report</u>
   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 and Receipts for all providers From 14/12/2017 to 14/12/2017 Page 1 of 1
Printed: 14/12/2017 12:55

(1) Lmnecli, Dr Inkerr

Dated	Name	Inv/Rec ID	Invoice details: Total	% involved	$ Discnt	$ involved	Expense	Receipt details: Total	% involved	$ involved	Credits / Deposits
14/12/2017	Ogier, Ana	47187	1620.00	100.00		1620.00					
14/12/2017	Ogier, Ana	47187		100.00	Pr -420.00	-420.00					
14/12/2017	Ogier, Ana	47187						1200.00	100.00	1200.00	
Totals for (1) Lmnecli, Dr Inkerr from 14/12/2017 to 14/12/2017		Totals			-420.00	1200.00	0.00			1200.00	0.00

2. <u>Promotions List</u>
   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.

Promotions List (active only) From 14/12/2017 to 14/12/2017 Page 1 of 1
Location: Dental Practice #1 Printed: 15/12/2017 08:23

Promotions Type: Package Promotions

Promotion Name	Promotion Status	Date From	Date To	No of Invoices with the Promotion
Bleach 2018	Active	14/12/2017	30/04/2018	1
New Visit	Active	13/12/2017	14/12/2017	0

Total of Package Promotions: 2

Promotions Type: Items Promotions

Promotion Name	Promotion Status	Date From	Date To	No of Invoices with the Promotion
Bleach	Active	13/12/2017	14/12/2017	0

Total of Items Promotions: 1
Total Promotions: 3

3. <u>Promotions report on Patients</u>
   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: **Promotions performed on Patients** From 14/12/2017 to 14/12/2017 Page 1 of 1
Dental Practice #1 Printed: 15/12/2017 08:30

Promotions Type: Package

Promotion Name	Promotion 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: <u>Multi Location handling be in Fees</u>

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

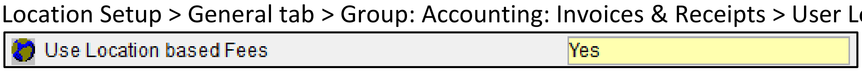
1. All locations will contain the same fee level names
    a. Fee Level Fee period dates will be the same for all locations
    b. A user will be able to set the default fee level on a per location basis i.e. each location can have a different default fee level
        i. Where a user changes “Use Location 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

Activation/Setup

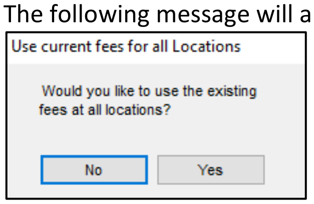
The following areas needs to be setup by users before using this features.

4. Turn on location based fees

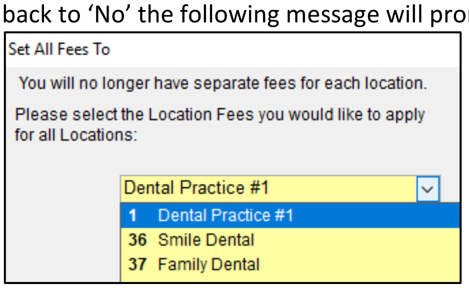
    Location Setup > General tab > Group: Accounting: Invoices & Receipts > User Location based Fees = Yes



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

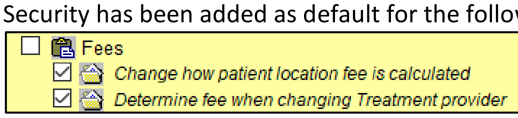


By default the ‘User Location Based Fee’ setting is set to ‘No’, if the users have this setting set to ‘Yes’ and wants to change back to ‘No’ the following message will prompt to select location for which single Location Fee will be based on



5. Security

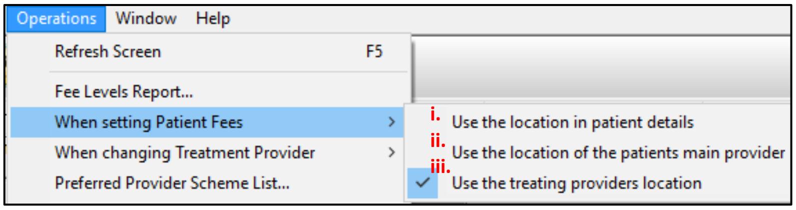
    Security has been added as default for the following areas.



6. Setting up Patient Fees

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

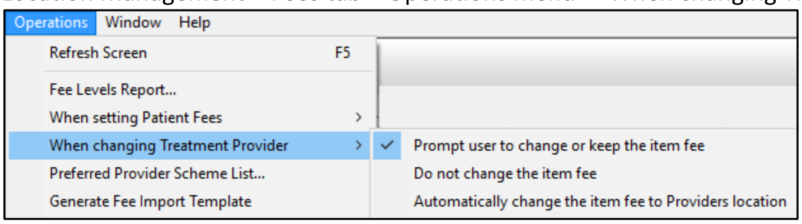
    Location Management > Fees tab > Operations menu > ‘When setting patient Fees’. “Use the Treating provider’s location” is recommended



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

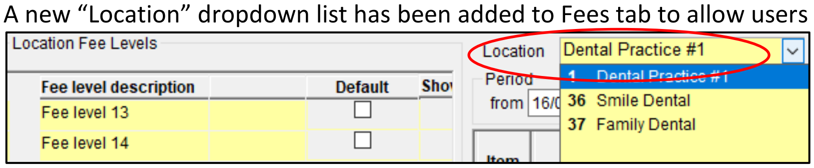
Location Management > Fees tab > Operations menu > 'When changing Treatment Provider'



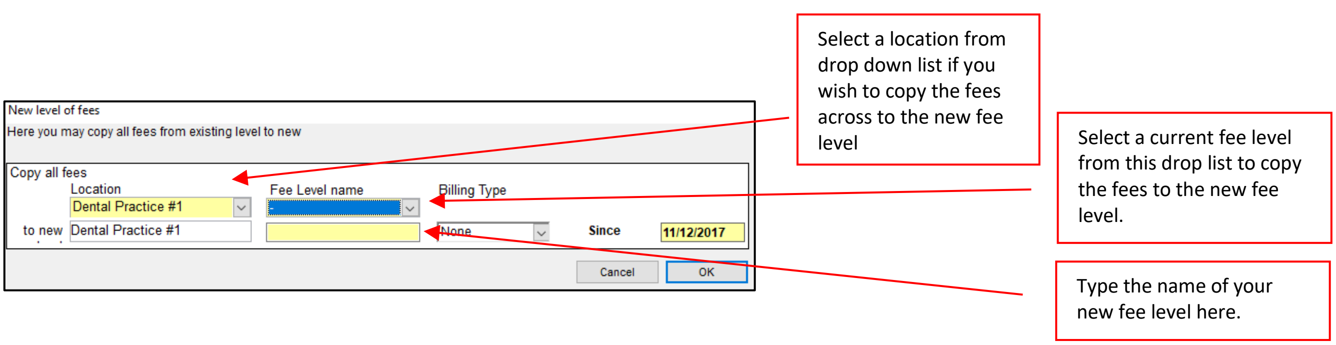
Fee Level Setup

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



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



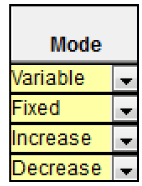
Fee Mode

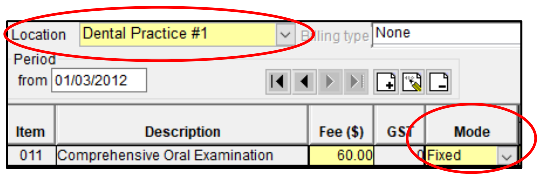
When working with Multi-location environment the modes chosen for each item number will be the same across all locations

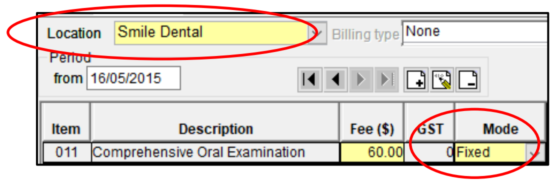
Variable *Fee can be changed in Treatment/Treatment Plan*

Fixed *Fee is not able to be changed in Treatment/Treatment Plan*

Increase *Fee can only be increased in Treatment/Treatment Plan*







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

<u>Location Management > Fees Tab > Highlight the 'Provider Based' Fee Level > Select the 'Default Level' button</u>

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:

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

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

Fee Periods

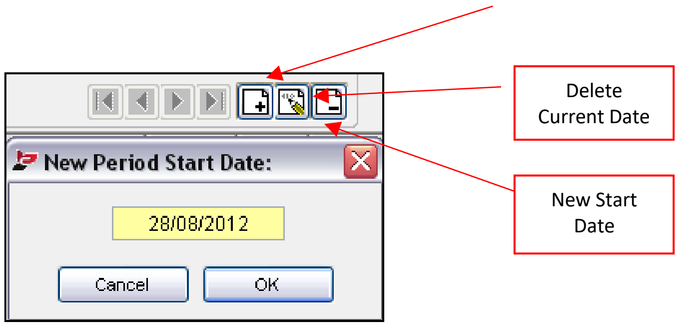
To ensure fees are never erased/typed over in D4W/PSS you should always create a *new period start date* each time you edit the fees. Keep in mind that Treatment Plans and unaccounted treatment take information from the fees section, so it is best to keep a record of each fee charged per date range.

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.

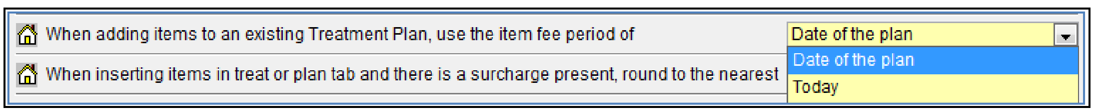
<u>Location Management > Fees Tab > Highlight the level you wish to update > Select the 'Add New' button > Enter the date this new fee schedule is to start.</u>

You are now ok to start overwriting the current fees.

Edit Current Date



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…



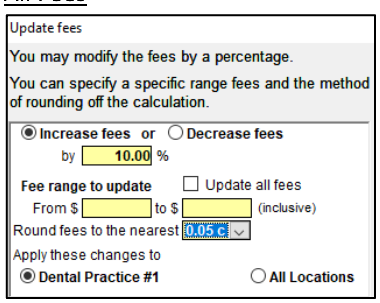
Update the Fees

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

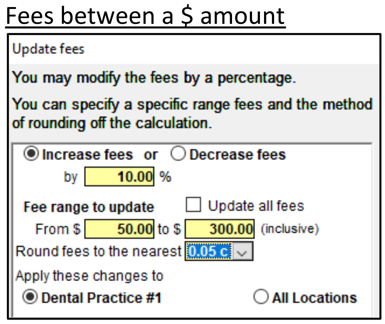
Note: You should be updating the current fee period before updating fees.

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.

All Fees



Fees between a $ amount

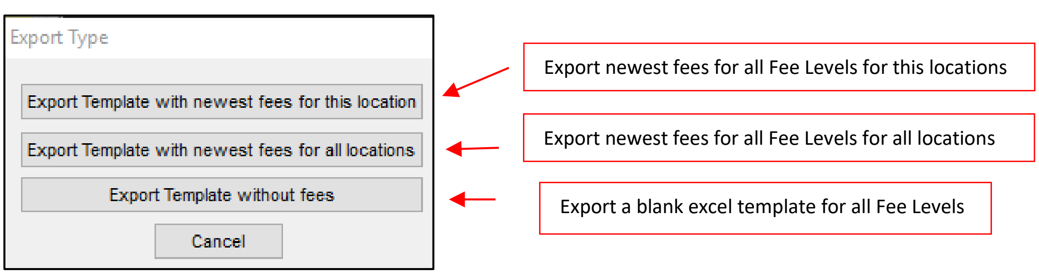


Automated Fee Update/Import

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

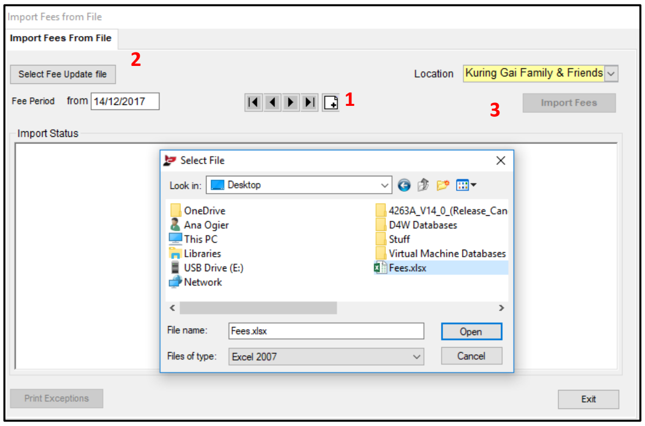
Location Management > Fees Tab > Operations Menu > Generate Fee Import Template



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

<u>Location Management > Fees Tab > Operations Menu > Update Fees from File</u>

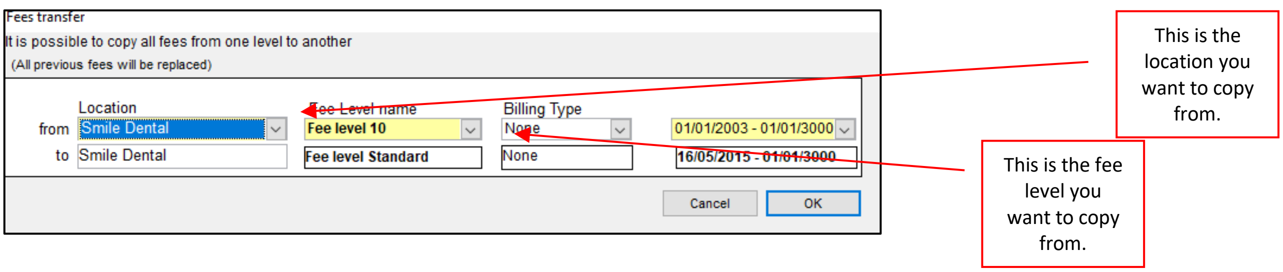


1. Create new fee period or select an existing fee period
2. Select Fee Update file > Import the Excel file
3. Select "Import Fees"
4. Press 'Open'

You can setup security for "Import fees from file".
<u>Location Setup > Security Tab > Setup Security > Fees > Import fees from file</u>
Please refer to 'Security_How to setup' for details.

Copy From

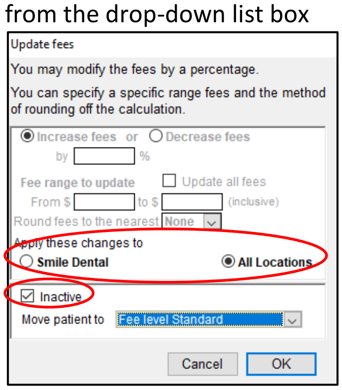
<u>Location Management > Fees Tab > Highlight the level you want to copy to > Select 'Copy From' button</u>
Note: You should be updating the current fee period before copying fees.
While in the 'Fees Transfer' window, select the location and fee level you wish to copy from and the date range you wish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



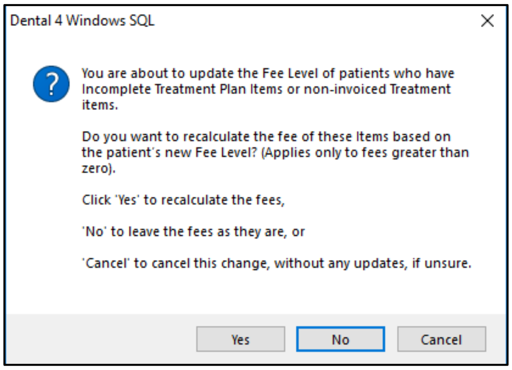
Once you have said OK, the fees from the selected level will be updated.

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 from the drop-down list box



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



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.

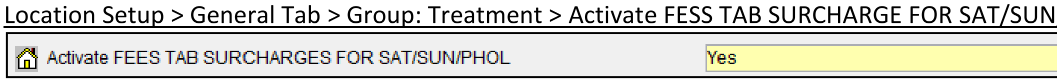
Surcharges

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:

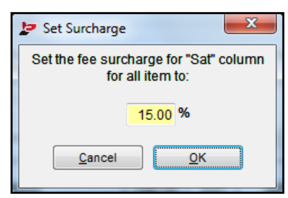
Location Setup > General Tab > Group: Treatment > Activate FESS TAB SURCHARGE FOR SAT/SUN/PHOL



To setup the surcharges:

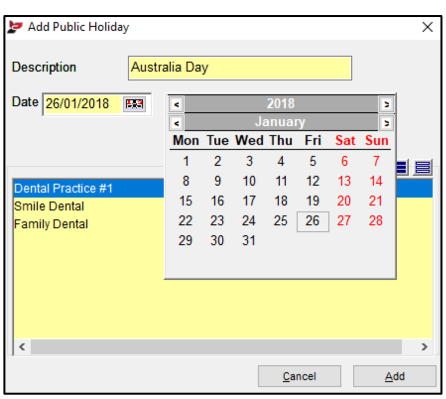
Location Management > Fees Tab > Highlight the Fee Level you wish to add surcharges to

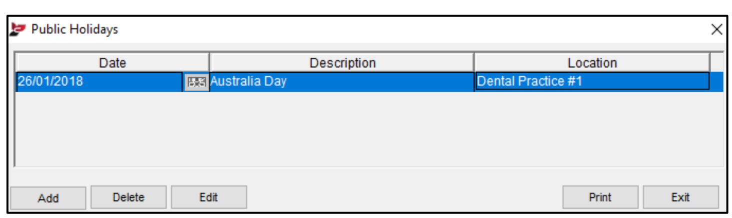
If you wish to add a surcharge % to all items simply click on the day and enter the percentage. Otherwise you can enter the percentage against the item numbers you wish to charge the surcharge.



To setup Public Holidays:

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



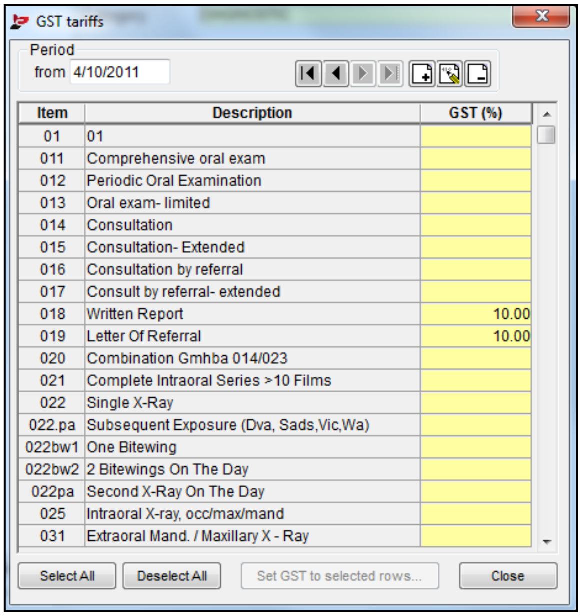


The Public Holiday can be edited and deleted at anytime

Setting up GST

<u>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</u>.

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



Fee Levels Report

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

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

Subcategory: Examinations							
Item	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

<u>Location Management > Reports Tab > Location Fee Level Comparison Report</u>

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: <u>Multi Location - Letter Template management</u>

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

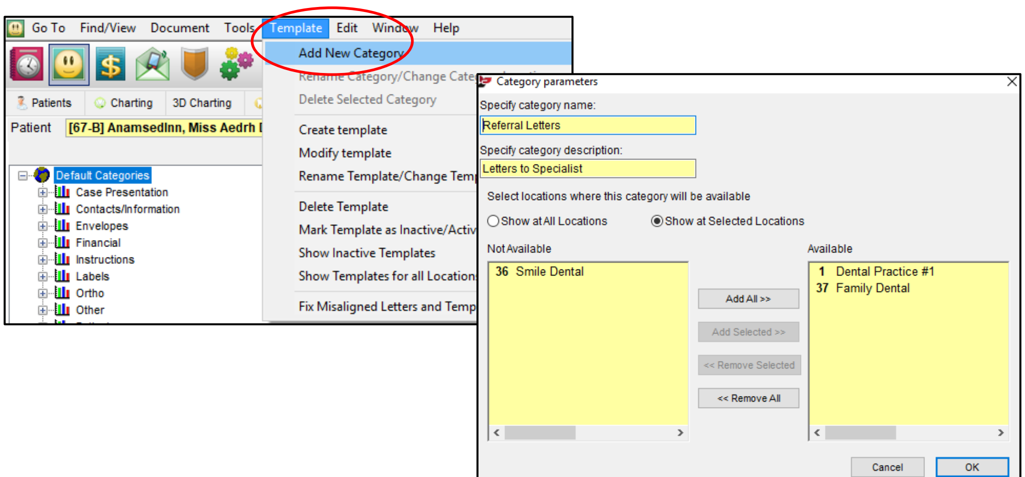
In a patient's file click on Template menu > Add New Category

Specify category name: E.g. Referral Letters

Specify category description: E.g. Letters to Specialists

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

OK

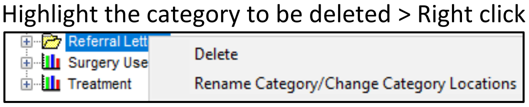


Rename/Change Category Location

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



Create a Template

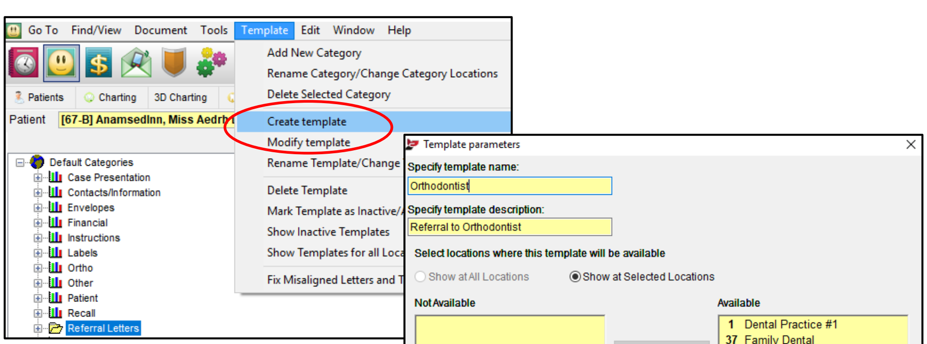
Highlight the category you want to create the template in > Click on Template menu > Create template

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

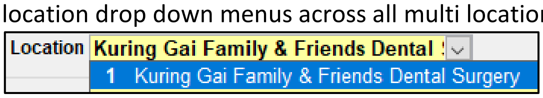
OK



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

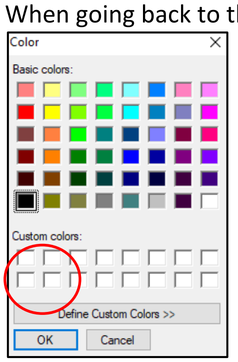
ENHANCEMENT: Multi-location Extend Location Name length in drop lists
When working with multi location environment the surgeries will have a clear view of the full name of each practice displayed in all location drop down menus across all multi location areas of the program. A maximum of 50 characters are allowed per location name

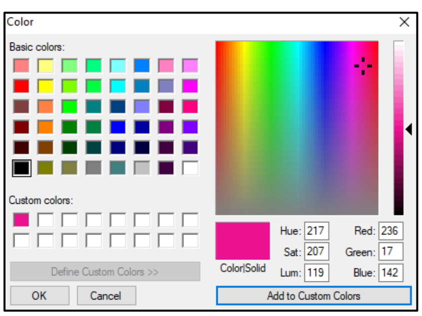


ENHANCEMENT: Custom Font Colours in Rich Text Editor to be saved
When using the "Add to Custom Colors" in Rich Text Editor the 'custom colors' are now being saved after closing the selected colour window for Font and Background colours.

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