

NEW FEATURES AVAILABLE IN Vi5

==== BUILD 4394== Vi5/PB12 ====

NEW: Electronic Communications - Unsubscribe /opt out functionality

Under the *Spam Act 2003*, every commercial electronic message must contain a functional and legitimate 'unsubscribe' facility. This is an electronic address the recipient can use to tell the sender they do not wish to receive messages (amca.gov.au, 2015). This new feature allows Dental4Windows (D4W) users to comply with the requirement of this act by including an unsubscribe link in messages which they deem to be a commercial electronic message (CEM).

All types of SMS and e-mail have the option to opt out except debtor reminders and individual SMS from the Patient's file.

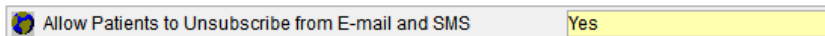
Prerequisites

The SMS and E-mail modules must be activated to use the unsubscribe feature. Please contact Centaur Software if you don't have these modules installed.

Setup

1. Setup feature

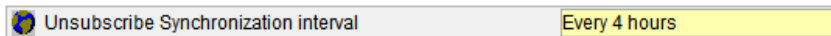
- i. Go to **Location Setup > General** tab
- ii. Select **Group: eServices**
- iii. Change the setting for allowing the patients to unsubscribe



Allow Patients to Unsubscribe from E-mail and SMS

- iv. Change the setting for synchronisation if required

The unsubscribe sync interval determines how often D4W checks for patients who have unsubscribed to update the system

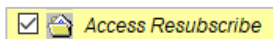


Unsubscribe Synchronization interval

2. Security Setup

The following security setting will control access to the removal of e-mail and SMS from the resubscribing list.

- i. Go to **Location Setup > Security** tab
- ii. Select **Record** menu > Select **Security status**
- iii. Within the **Patient** section, see **Access Resubscribe**



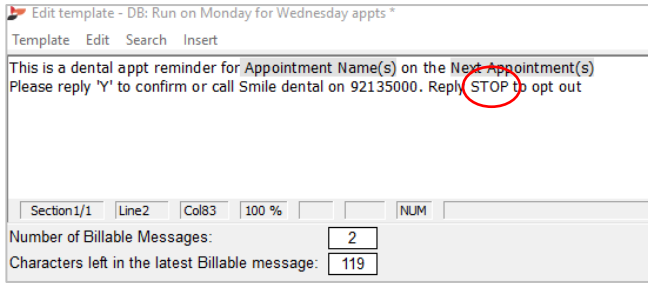
Access Resubscribe

For more information on how to setup security, please refer to 'How to Setup Security' document or video from the Learning Centre.

3. Template Setup

- a) SMS

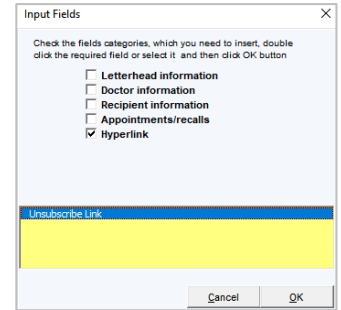
All active SMS templates must be updated with the word 'STOP' by either typing it or adding the 'STOP' input field. Refer to 'Editing SMS and Email templates' document for instructions...



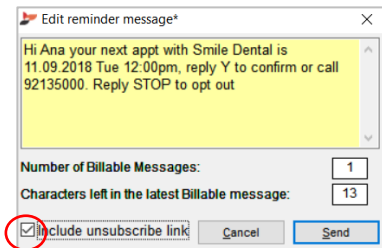
b) E-mail

Users will need to insert the **Unsubscribe link** hyperlink to their templates for all e-mail reminders. Refer to 'Editing SMS and Email templates' document for instructions.

1. Edit e-mail template
2. Add input field 'Hyperlink' to your template



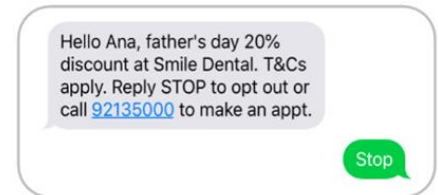
Note: Before sending an SMS or e-mail from a patients' appointment, users can add the unsubscribe link by placing a tick in **Include unsubscribe link**.



4. Patient journey

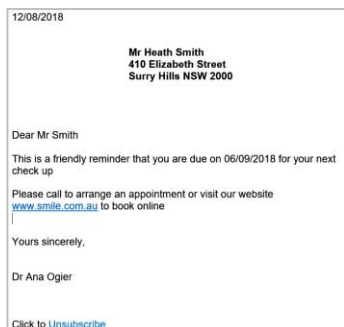
a) SMS

- i. The patient receives an SMS
- ii. Patient replies STOP
- iii. D4W automatically unsubscribes the patient from that reminder and updates the patient's file. See step 5 for more details.

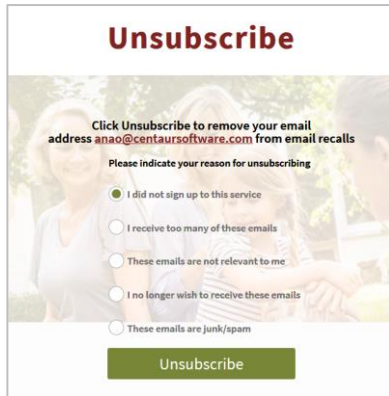


b) E-mail

- i. The patient receives an e-mail



- ii. Patient clicks on the unsubscribe link
- iii. The system takes the patient to the below window



- iv. When the patient selects a reason and clicks the **Unsubscribe** button, D4W automatically unsubscribes the patient from that reminder and updates the patient’s file. See step 5 for more details.

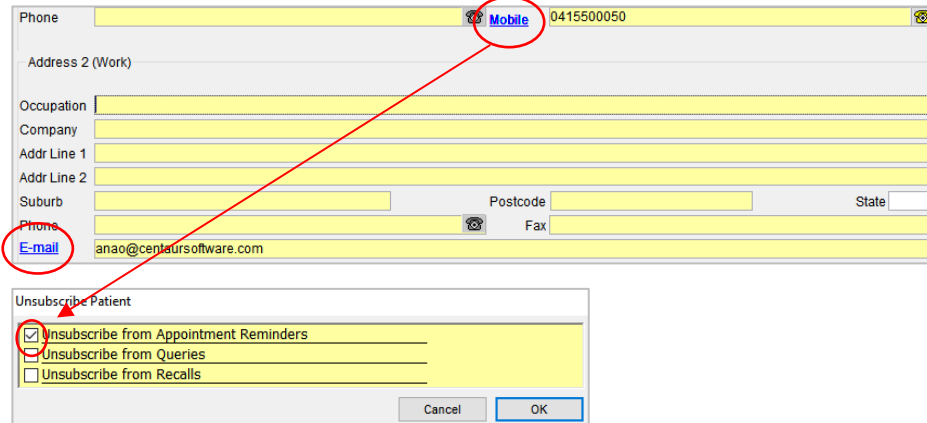
5. Patients file

When a patient unsubscribes from any reminder, the system knows which reminder they are unsubscribing from (Appointments, Recalls or Queries) and updates the patient’s file accordingly.

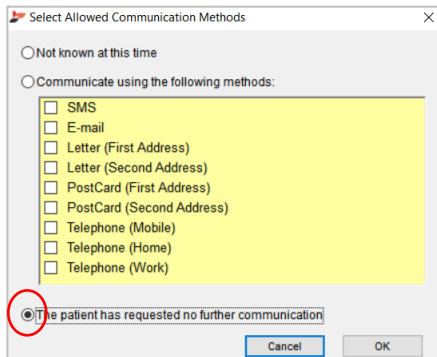
See **(unsubscribed)** in **Patient Records > Patients tab > Address sub-tab**

Send Appt. Reminders	Family	Ana	SMS (unsubscribed), E-mail
Send Invoices to	Family	Ana	Letter (First Address)
Send Recalls to	Family	Ana	SMS, E-mail
Send Queries to	Family	Ana	SMS, E-mail (unsubscribed)

A practice can remove the unsubscribe preference by clicking on the **Mobile** or **E-mail** link and removing the relevant tick.



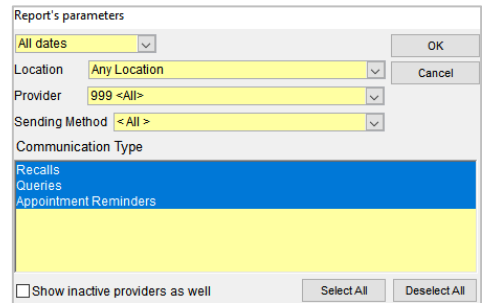
A practice can unsubscribe a patient by ticking **The patient has requested no further communication** for each send to method. When a practice unsubscribes a patient, all method of communication will be unsubscribed.



6. Reporting

To access the report for this feature, go to **Location Management > Report Tab > Patients Unsubscribed Report**
 The report provides details of the patient and which communication method they unsubscribed from in the period.

- i. **Select date range:** Select date from the drop list
- ii. **Location:** Select the relevant location
- iii. **Provider:** Select from the drop list
- iv. **Sending Method:** Select from the drop list SMS or e-mail
- v. **Communication Type:** Highlight which Communication Type



Unsubscribed Patients from 01/01/1900 to 01/01/3000							Page 1 of 1
(Last updated: 14/08/2018)						Printed: 14/08/2018 12:13	
Patient	Mobile	Email	Unsubscribed from Recalls	Unsubscribed from Queries	Unsubscribed from Appointment Reminders	Date Unsubscribed	
Wood, Mwel #78	0415500050				SMS	13/08/2018	
Mac, David #76	0415500050	anao@centaursoftware.com			"I did not sign up to this service"	13/08/2018	
Young, Scott #66		anao@centaursoftware.com		"I did not sign up to this service"		09/08/2018	
Ozier, Mrs Ana #6	0415500050	anao@centaursoftware.com			SMS	13/08/2018	

ENHANCEMENT: [New Features and improvements in the SMS module](#)

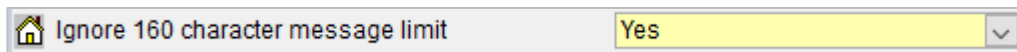
To provide better usability of the SMS module, improvements and new features have been added to the module.

1. Extend SMS template character limit

The number of characters accepted in an SMS template and/or individual SMS can now be increased. When this feature is turned on, the SMS message boxes and SMS templates will display the number of billable messages and characters left in the last billable message. 1 billable message = 160 characters.

1. Setup

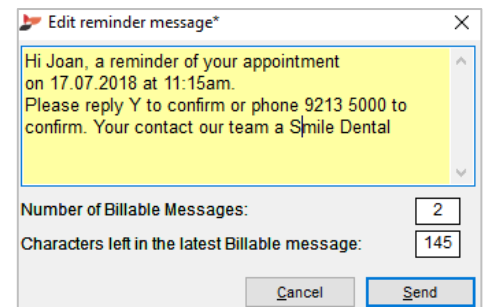
- i. Go to **Location Setup > General** tab
- ii. Select **Group: SMS Settings**
- iii. Select **Yes** for the **Ignore 160 character message limit** setting



2. Usage

The number of billable messages and character warnings are displayed in the following areas within D4W.

- **Appointment Book > right click on Appointment > Send > SMS**
- **Appointment Book > Options menu > Send reminder ***
- **Patients Records > Patients tab > Patients menu > Send SMS**
- **Debtors & Marketing > Recalls and Queries tab > SMS ***
- **Debtors & Marketing > Mail Merge Setup tab > Mail Merge Category: Appointments and eAppointments (Cancellation and Confirmation)**
- **Location Management > Automation tab > Appointments and Debtors**



* The Bulk SMS sending windows will have the **Number of Billable Messages** column as well as the total count.

2. SMS Batch Threshold

You are able to set a threshold for SMS to help control the amount of SMS sent.

1. Security

Two security settings can be added to control the feature.

- i. Go to **Location Setup > Security** tab
- ii. Select group: **D4W System**

<input type="checkbox"/>	SMS: Run Batch above Threshold
<input type="checkbox"/>	SMS: Adjust the Threshold

Please refer to 'How to Setup Security' document or video from the Learning Centre

2. Setup

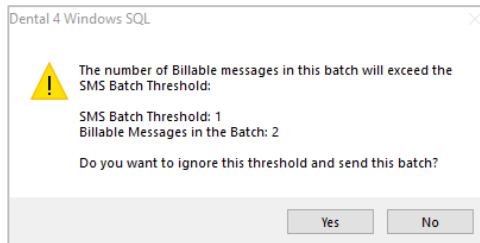
- i. Go to **Location Setup > General** tab
- ii. Select **Group: SMS Settings**
- iii. Click on the button to change the threshold



- iv. Press **OK**

If the number of the billable message exceeds the threshold, the following message will appear when sending:

- Manual SMS



- Automation SMS

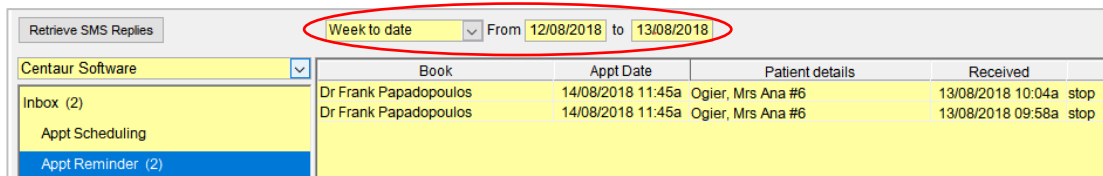
The batch will fail, and the user will need to manually reprocess the batch.

Date/Time	Reminder	Set/Type	Status	Total	Processed	Not Sent	Print Pending	Messages
21/08/2018 10:05	Appointments	Daily SMS reminders / ___Wednesday	Warning: Empty Batch, No records Found	0	0	0	0	
21/08/2018 15:13	Appointments	Daily SMS reminders / TestA	incomplete: Failed to run. SMS Batch Threshold exceeded	2	0	0	0	

Note: Only users with security access can ignore the threshold limit.

3. New Date Ranges in SMS Manager

When viewing reply messages in SMS Manager, users can view records for a specific date range.

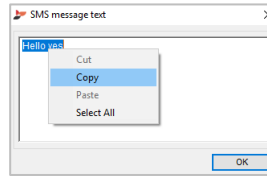


Book	Appt Date	Patient details	Received
Dr Frank Papadopoulos	14/08/2018 11:45a	Ogier, Mrs Ana #6	13/08/2018 10:04a stop
Dr Frank Papadopoulos	14/08/2018 11:45a	Ogier, Mrs Ana #6	13/08/2018 09:58a stop

4. Ability to Copy Text from SMS reply

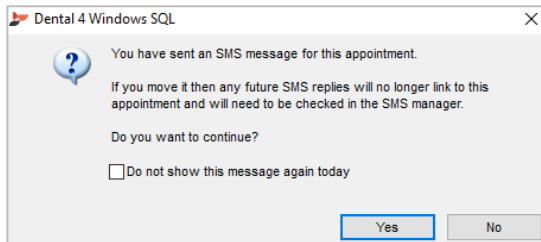
SMS replies can be copied from the patient's appointment or SMS Manager and saved anywhere within or outside of D4W.

- i. Open the SMS reply
- ii. Double click on the reply
- iii. Right click on the message > select **Copy**



5. Handling SMS Replies for Moved Appointments

The following message will appear when moving an appointment after an SMS has been sent, as the reply will no longer be related to that appointment.



This feature can be turned off in General Settings.

- i. Go to **Location Setup > General** tab
- ii. Select **Group: SMS Settings**
- iii. Change your preference for **...moving SMS linked Appointments**

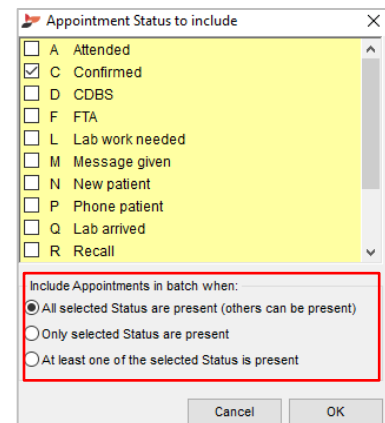
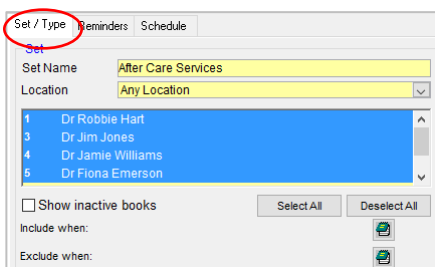


ENHANCEMENT: [Improvements to Automation](#)

1. Include/Exclude Appt Statuses using All, Only or Any

Three new options have been added to help improve functionality when linking Appointment Statuses to Automation.

- i. Go to **Location Management > Automation** tab
- ii. Select **Appointments** automation sub-tab
- iii. Select **Set/Type** sub-tab



- a. **Include when:** Select status to show options to include

- **All selected Status are present (other can be present):** Appointments must contain all selected statuses and can contain additional which are not selected.
- **Only selected Status are present:** Appointments must contain only the selected statuses

- **At least one of the selected Status is present:** Appointments must contain at least one of the selected statuses
- b. **Exclude when:** Select status to show options to exclude
- **All selected Status are present (other can be present):** As above
 - **Only selected Status are present:** As above
 - **At least one of the selected Status is present:** As above
- iv. Press **OK**

2. Merge of Setting and Schedule tabs

Improvements have been made to Automation to help simplify the setup process. This was achieved by merging the **Settings** sub-tab with the **Schedule** sub-tab and then breaking the steps into sections.

Go to: **Location Management > Automation tab > see the Schedule sub-tab**

I. Set the frequency

No changes to the frequency of sending batches have been made.

II. Set the timing

- **Start Date:** Select the date to run the batch
- **Next Run Date:** Shows the next run date
- **Run Time:** Select the time to send the batch

III. Include Patients who have Appointments

- **Simple:** Select from the drop list
- **Advanced:** Select capture period if not available under **Simple**
- **Check Upcoming Run Dates:** This shows upcoming batches and # days captured

Run date	Date From	Date To	Days Captured
Monday 30 July 2018 at 11am	01 August 2018	01 August 2018	1
Monday 06 August 2018 at 11am	08 August 2018	08 August 2018	1
Monday 13 August 2018 at 11am	15 August 2018	15 August 2018	1
Monday 20 August 2018 at 11am	22 August 2018	22 August 2018	1
Monday 27 August 2018 at 11am	29 August 2018	29 August 2018	1
Monday 03 September 2018 at 11am	05 September 2018	05 September 2018	1
Monday 10 September 2018 at 11am	12 September 2018	12 September 2018	1
Monday 17 September 2018 at 11am	19 September 2018	19 September 2018	1
Monday 24 September 2018 at 11am	26 September 2018	26 September 2018	1
Monday 01 October 2018 at 11am	03 October 2018	03 October 2018	1

Print OK

Set / Type Reminders Schedule

Scheduler

1. Set the frequency:

One time

Daily

Weekly

Monthly

Repeat every weeks on:

Sunday Monday Tuesday Wednesday

Thursday Friday Saturday

2. Set the timing:

Start Date

Next Run Date

Run Time

3. Include Patients who have Appointments:

Simple

Advanced

The Day after Tomorrow

The Day before Yesterday

Yesterday

Today

Tomorrow

The Day after Tomorrow

The Day that is 3 Days in the Future

The Day that is 1 Week in the Future

The Day that is 2 Weeks in the Future

4. Control the schedule:

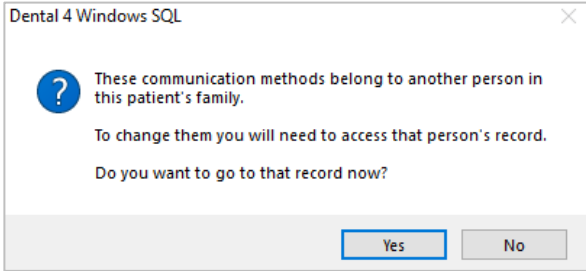
Enable

IV. Control the schedule

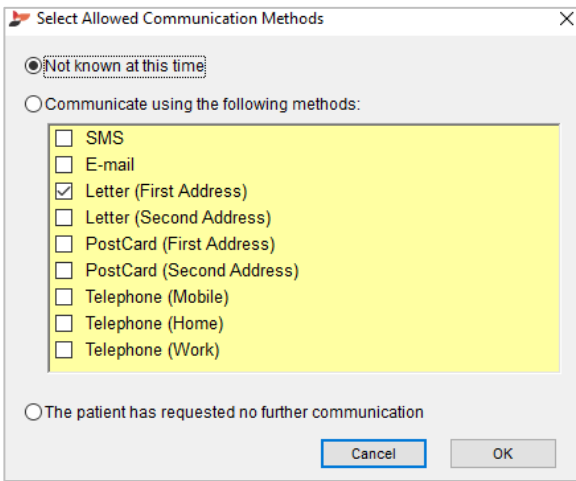
- **Enable:** Tick when ready to activate the schedule

ENHANCEMENT: [Cosmetic Improvements to "Send To" Dialogs](#)

When a family member’s file is created in the system, their reminders are automatically sent to the family head and their chosen method of communication. For a member to change the method of communication for any of their reminders, the system will prompt you to move to the family head’s profile to make the changes.



When the **Send To** is marked as ‘Not known at this time’ or ‘The patient has requested no further communication’ users will need to untick the communication methods manually.

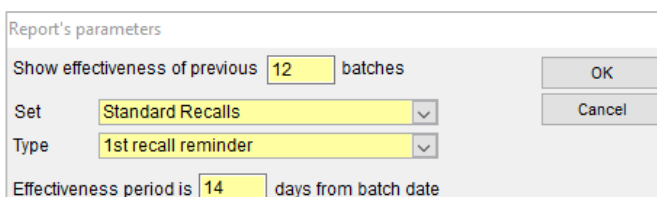


NEW: [Report - Effectiveness of Recall Batches \(Automation and manual methods\)](#)

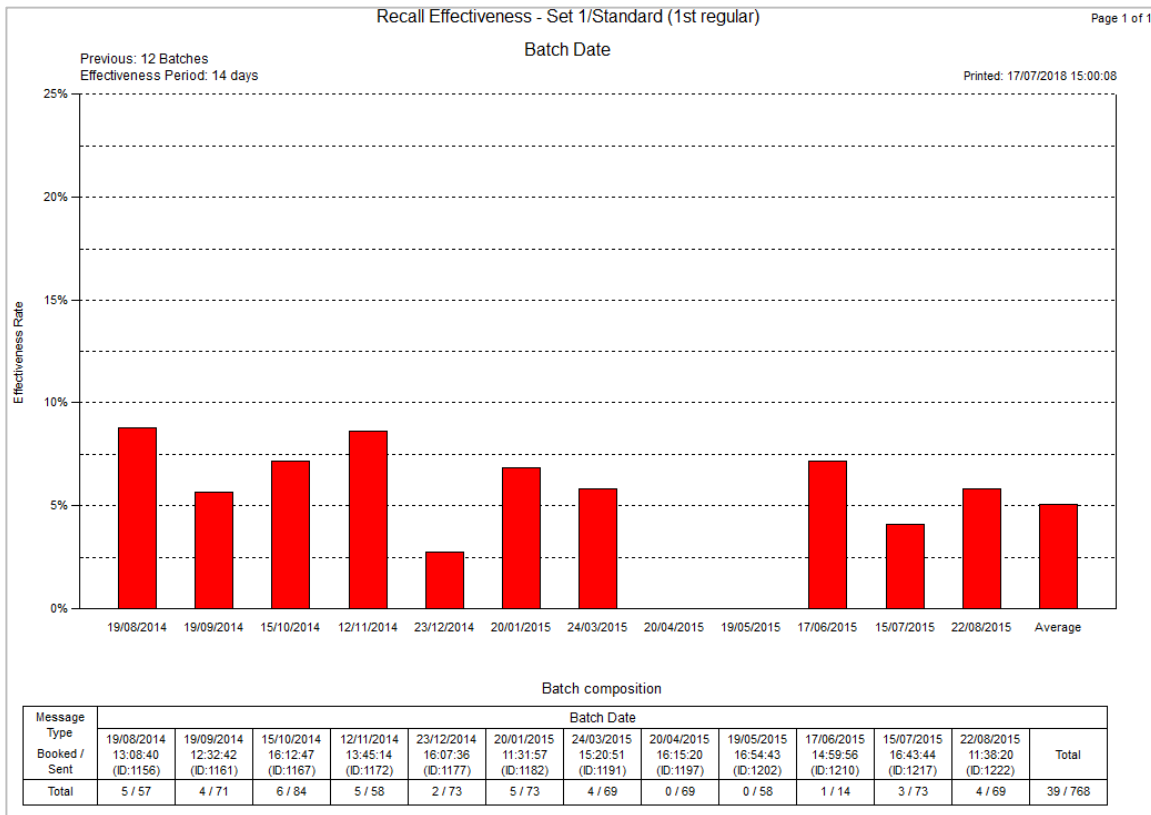
To provide users with data on the number of patients rebooked after the recalls have been sent, two effectiveness reports are now available in D4W.

1. Go to **Location Management > Reports** tab
 - a) Recalls Effectiveness Report

This report shows a percentage of patients included within a batch/es who had booked an appointment within the number of days from when the batch was created. This is useful for checking if changes to your recall message content or changing the timing of sending recalls increases or decreases the number of patients responding to recalls.



Example: Patient was sent a recall reminder on the 01/08/2018 and scheduled an appointment within 14 days of that batch, the report would show how many patients have booked an appointment.



b) Recalls Message Type Effectiveness Report

This report shows a percentage of patients included within a batch/es who had booked an appointment, separated by messaging method (SMS, E-mail, Letter), within the number of days from when the batch was created. This is useful for determining what message type gives you the best recall result. E.g. If SMS provides a higher effectiveness percentage a surgery should encourage patients to receive their Recall via SMS.

Report's parameters

Show effectiveness of previous batches OK

Set Cancel

Type

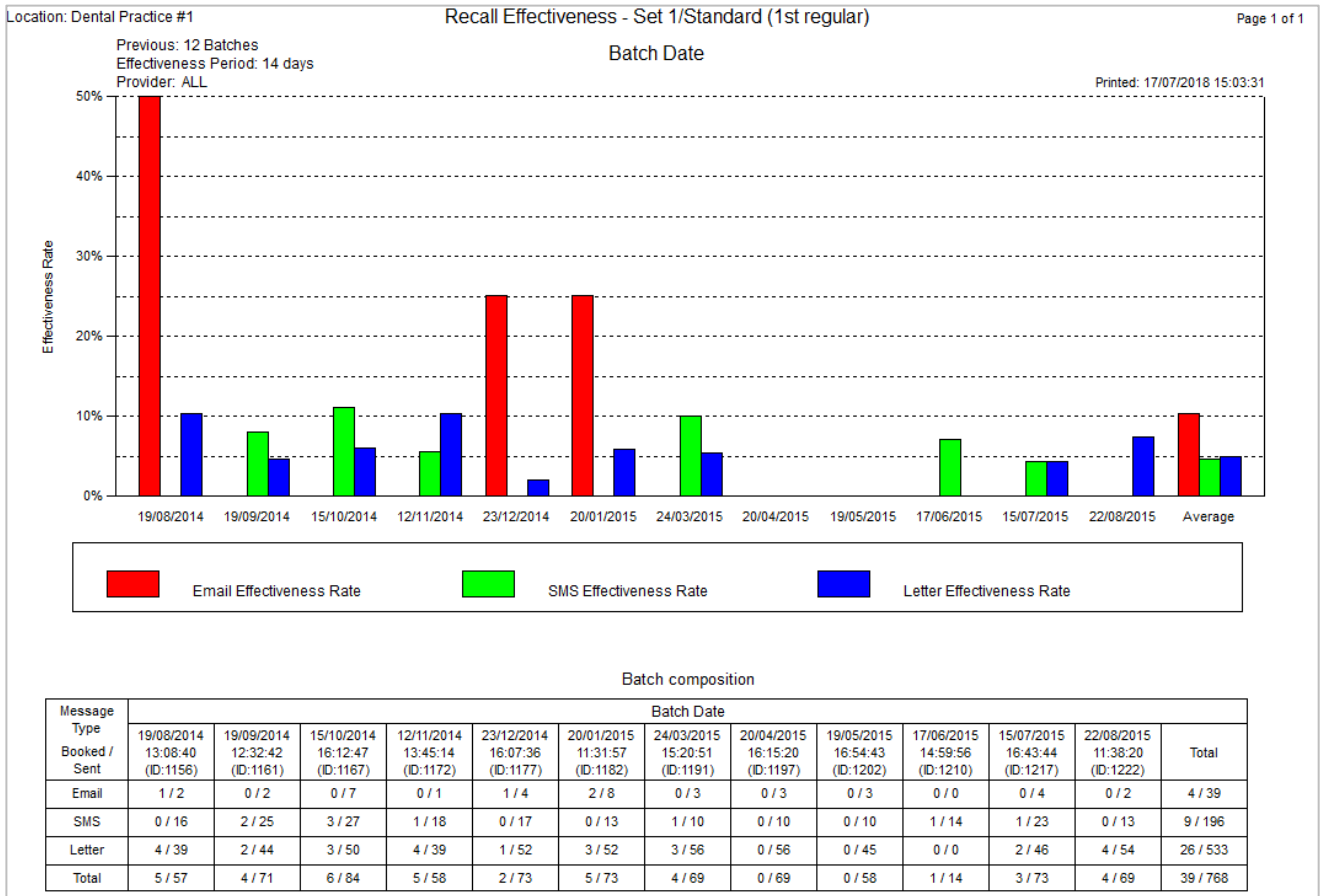
Effectiveness period is days from batch date

Location

Provider

Show Clustered Bar Chart

Show inactive providers as well



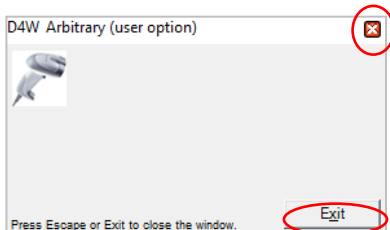
Note: Both reports are available on Scheduled Reports features

For more information, please refer to the 'Schedule Reports' document.

ENHANCEMENT: [Sterilisation Module: Add Exit Controls to Barcode Capture Dialog](#)

Two methods for closing the scanning window have been added to enhance the workflow of this feature. The enhancement will occur in the following areas:

- Go to **Location Management** > **Sterilisation** tab > **Add** button
- Go to **Location Management** > **Sterilisation** tab > **Autoclave** menu > **Input/Output Packs**
- Go to **Patient Details** > **Treatment** tab > Notes column > **Hide fast Notes** > **Sterilisation**



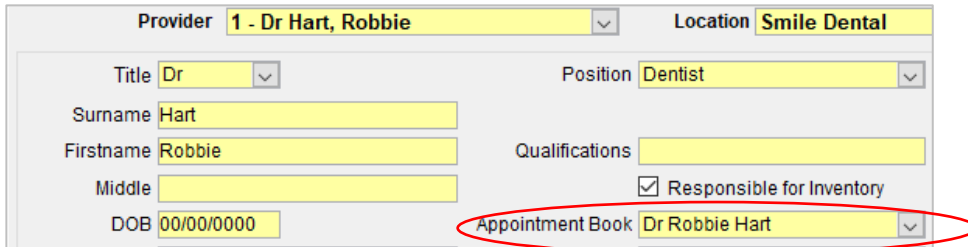
1. 'X' icon
2. 'Exit' button

ENHANCEMENT: [eChat: Link Patient Arrived to eChat Message](#)

eChat can automatically notify a provider when their patient is marked as arrived in the Appointment Book. This feature is controlled by the link between a provider and their Appointment Book and the provider must be logged in to eChat to receive the message.

1. Link Provider and Appointment Book

- I. Go to **Location Management > Providers** tab
- II. Select from the **Appointment Book** drop list



2. Turn on feature

- I. Go to **Location Setup > General** tab
- II. Select **Group: Communication settings**
- III. Set your preference for **eChat: Notify about Patient arrived**



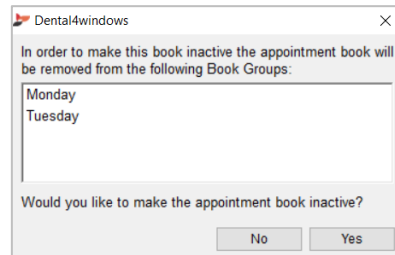
For more information, please refer to the 'eChat' how to document and video

ENHANCEMENT: [Making Appointment Book inactive under groups](#)

When an Appointment Book is marked as inactive, the book will be removed from associated Appointment Book groups.

Appointment Book Groups can be used to group certain appointment books into the 1 view, rather than viewing all books at the same time.

1. Go to **Appointment Book**
2. Select **Options** menu > Press **Setup all books**
3. Select book > Press **Modify** > Untick **is active**
4. Press **Yes**



For more information, please refer to the 'Setup Appointment Book Group's how to document

ENHANCEMENT: [Multiple Location: Copy Fees to specific Location](#)

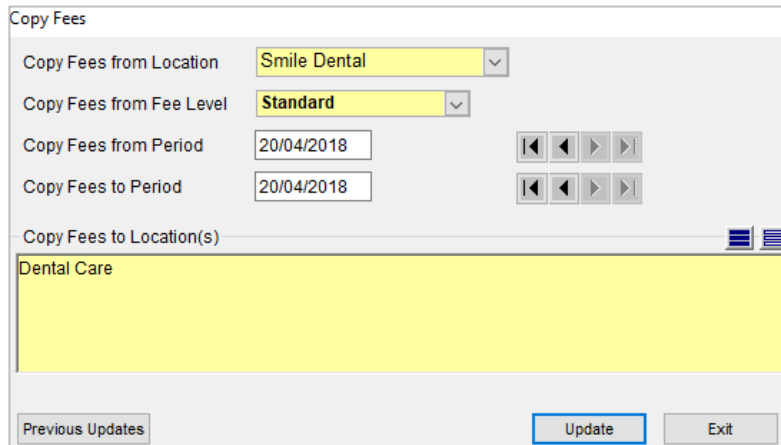
When working with a multi-location environment, users can easily copy fees between locations.

The feature allows the following:

- Copy fees from a single location to multiple locations
- Report on fees previously copied to multiple locations
- Select a date range to report on previous fees

Copy Fees

1. Go to **Location Management > Fees** tab
2. Click the **Copy Fees to Location(s)** button



Copy Fees

Copy Fees from Location: Smile Dental

Copy Fees from Fee Level: Standard

Copy Fees from Period: 20/04/2018

Copy Fees to Period: 20/04/2018

Copy Fees to Location(s): Dental Care

Previous Updates Update Exit

3. Select location, fee levels and period to be copied from
4. Select the location to copy to
5. Click **Update** button

For more information, please refer to the 'Multi Location_How to setup Fees Levels' how to document