

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 D4W 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

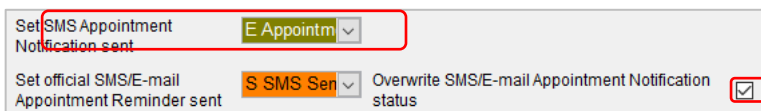
A new set and type are automatically created for Appointment reminders under **Debtors & Marketing > Mail Merge Setup** tab > Select **Mail Merge Category: Appointments**

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.

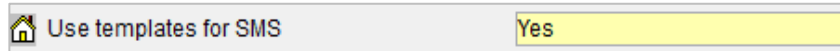


- **Practice Setup**


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**

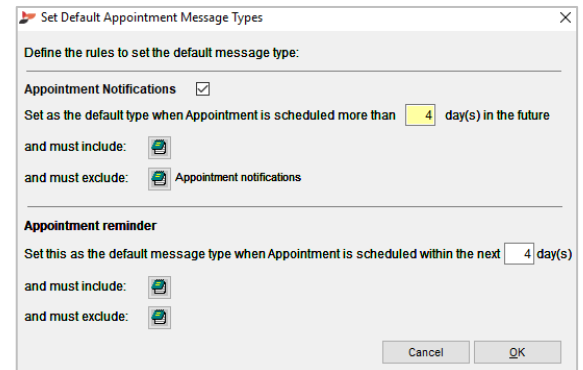


2. Setup template reminder

- 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



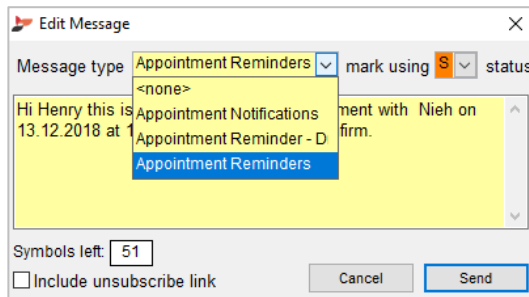
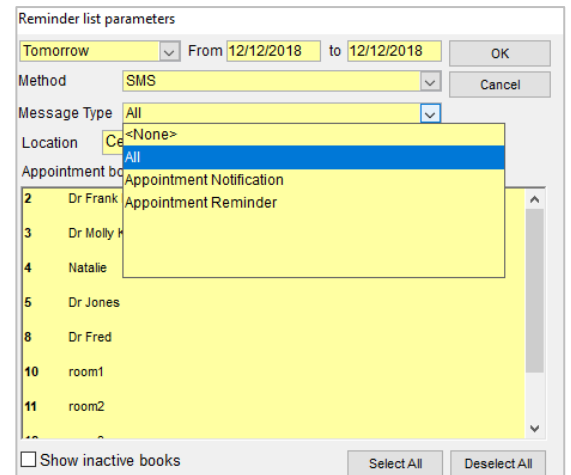
Usage

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



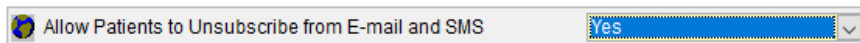
ENHANCEMENT: [Make Unsubscribe Settings Visible to all](#)

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

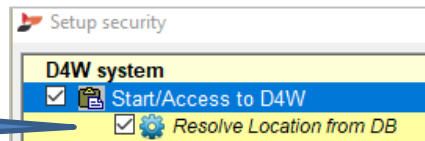
1. Go to **Location Setup > General** tab
2. Select **Group: eServices**
3. Setup **Allow patient to Unsubscribe from E-mail and SMS = Yes**



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.

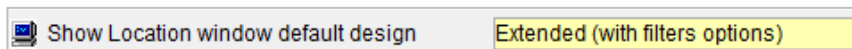
*This new general setting will only appear if the security **Resolve Location from DB** is turned on.*



Turn on setting

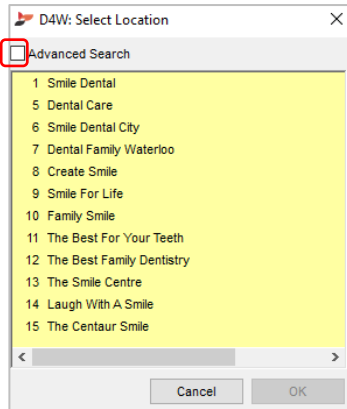
Turn on this setting to allow the users to filter the search when looking for locations.

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)**

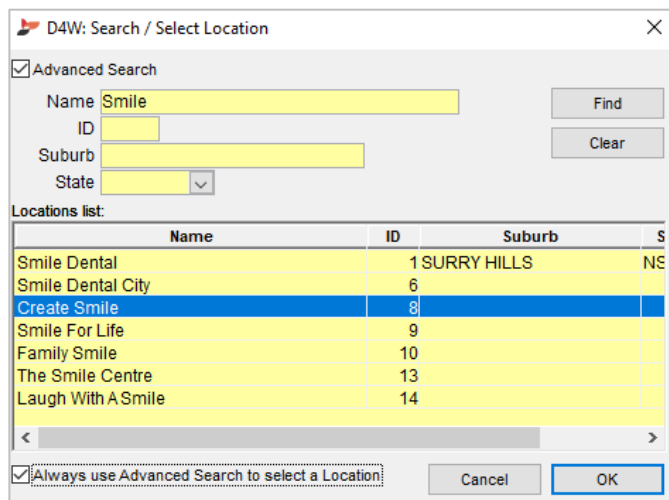


Usage

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: [NDP General Changes](#)

To improve the functionality of certain features of NDP within D4W, changes have been made to allow:

1. **Print Payment Plan on Treatment Plan items done**

The payment plan will be displayed at the bottom of Treatment Plan for items not done only.

- I. Go to **Patient Records > Treatment Plan** tab
- II. Select **Treatment Plan** menu > Select **Print Plan Payment Plan on Treatment Plan items done...**

Treatment Plan Operations Conditions Itemise

- New Plan
- New plan(customer settings)
- Modify Date/Time/Provider
- Refresh Screen
- Preview Plan Notes
- Clinical Notes Log audit...
- Treatment Done Report...
- Treatment History by Tooth...
- Deleted Treatment Plans report...
- Changed Treatment Plans report...
- Print Plan...
- Preview Plan...
- Include Estimated Payment Plan on printout
- Print Plan items not done only...
- Preview Plan items not done only...

Ensure Include Estimated Payment Plan on printout is ticked

1. Submit Certegy Application Term window

When submitting an application the term of the agreement (#months) will be displayed in the **Submit Certegy Application** window. The term will be calculated depending on the value of the Treatment Plan.

Go to Patient Records > Treatment Plan tab > Select Certegy Application

Submit Certegy Application

Please select the items to include in the Certegy Application
Include Items: Not done

Prv	Tooth	Surf	Item	Times	Description	Amount
1	18		323	1	Surgical removal of a tooth or fragment requiring re	500.00
1	28		323	1	Surgical removal of a tooth or fragment requiring re	500.00
1	48		323	1	Surgical removal of a tooth or fragment requiring re	500.00
1	38		323	1	Surgical removal of a tooth or fragment requiring re	500.00
1	13	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	12	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	11	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	21	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	22	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	23	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	24	B	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
Rows 11 # of selected Items 11						Total 5,500.00

Responsible Party: Sue

NDP Terms

Reference: 05197315

Total: 5500

Deposit: 1,100.00 or 20% VIP #

Repayment: 39 x 119.18 per fortnight *

*RRP of \$5500.00 and 20% deposit. Minimum amount payable \$5748.05 over 18 months. Includes \$70 Establishment Fee, \$3.50 monthly Account Keeping Fee and \$2.95 fortnightly Payment Processing Fee.

Submit Application Preview Exit

Previously it was always 6 months

2. Paper Size

When **Preview** is selected within the **Submit Certegy Application** window the paper size will be the same as the **Treatment Plan**.

Submit Certegy Application

Please select the items to include in the Certegy Application
Include Items: Not done

Prv	Tooth	Surf	Item	Times	Description	Amount
1	18		323	1	Surgical removal of a tooth or fragment requiring re	500.00
1	28		323	1	Surgical removal of a tooth or fragment requiring re	500.00
1	48		323	1	Surgical removal of a tooth or fragment requiring re	500.00
1	38		323	1	Surgical removal of a tooth or fragment requiring re	500.00
1	13	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	12	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	11	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	21	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	22	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	23	La	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
1	24	B	556	1	Tooth Coloured Restoration - Veneer - Indirect	500.00
Rows <input type="text" value="11"/> # of selected Items <input type="text" value="11"/> Total <input type="text" value="5,500.00"/>						

Responsible Party: Sue

NDP Terms

Reference: 05197315

Total: 5500

Deposit: 1,100.00 or 20% VIP #:

Repayment: 39 x 119.18 per fortnight *

*RRP of \$5500.00 and 20% deposit. Minimum amount payable \$5748.05 over 18 months. Includes \$70 Establishment Fee, \$3.50 monthly Account Keeping Fee and \$2.95 fortnightly Payment Processing Fee.

Submit Application Preview Exit

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**

Automatically add / remove item in Px treatment (status FTA)

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

Dental 4 Windows SQL

A treatment item with the "Fail to Attend" property is required to automatically add or remove an FTA in Treatment.

Do you want to set it up now?

Yes No

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

Setup Treatment Items properties (Other Details)

Item code: Find

Item description: Clear

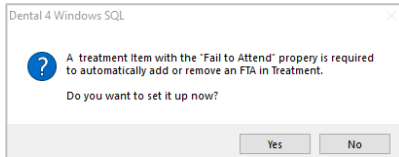
Code	Description	Category	Subcategory	Property	Value
fta	F T A - Fail To Attend	MISCELLANEOU	Miscellaneous	Non-Reporting	<input checked="" type="checkbox"/>
				Non-Treatment	<input checked="" type="checkbox"/>
				FTA - Fail to Attend	<input checked="" type="checkbox"/>
				UTA - Unable to Attend	<input type="checkbox"/>
				Tooth id is required	<input type="checkbox"/>
				Ignore missing tooth	<input type="checkbox"/>
				Tooth Surface is required	<input type="checkbox"/>

Cancel OK

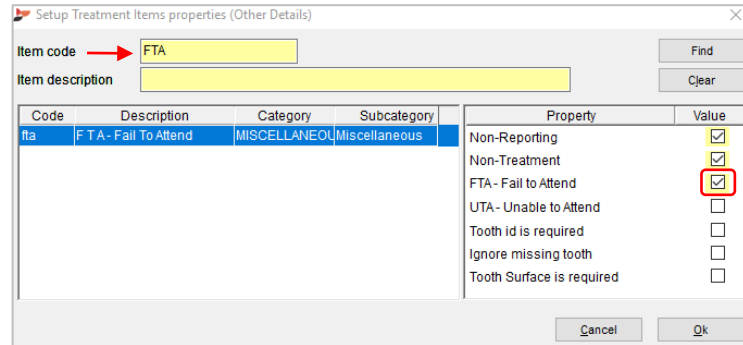
Repeat the above steps for **Automatically add/remove UTA item in Px treatment**

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

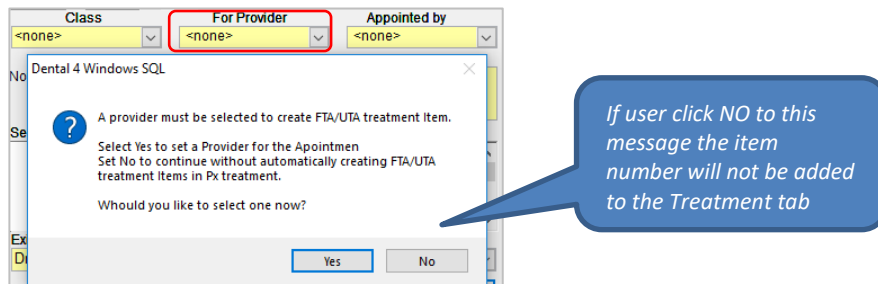
The **Items List** will have the FTA/UTA column

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	Priv.	Non Reporting	Non Treatment	FTA/UTA
uta	U T A - Unable To Attend			<input checked="" type="checkbox"/>							<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>

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

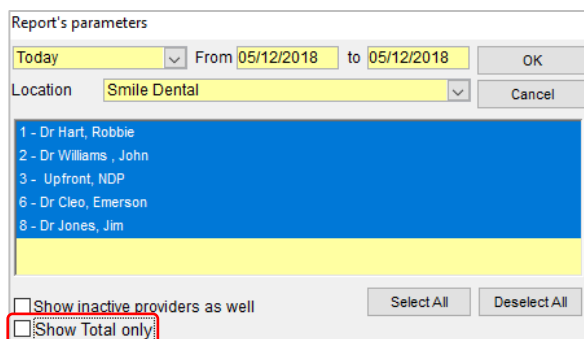
The Active Patient report looks for patients that have had treatment performed in a selected date range. If a new patient sees more than one provider in that period, this patient will be counted for each provider they have seen.

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)

Active Patients	
From 05/12/2018 to 05/12/2018 Printed: 5/12/2018 07:41	
Location: Smile Dental	
Provider	Total Patients
1 - Dr Hart, Robbie	1
2 - Dr Williams, John	1
3 - Uprfront, NDP	0
6 - Dr Cleo, Emerson	0
8 - Dr Jones, Jim	0
Total for all providers : 2	

Active Patients	
From 05/12/2018 to 05/12/2018 Printed: 5/12/2018 07:42	
Location: Smile Dental	
Provider	Total Patients
Total for all providers : 1	

ENHANCEMENT: [Ignore Unsubscribe for 'Duty of Care' communications](#)

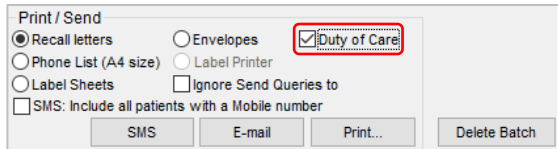
A new feature called **Duty of Care** has been created to differentiate the type of communications sent from the Queries module.

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

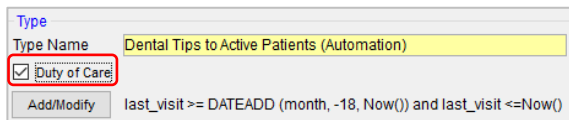
1. Go to **Debtors & Marketing > Queries** tab
2. Create the batch
3. Tick on **Duty of Care** box before sending the batch



The screenshot shows a 'Print / Send' dialog box with several options: 'Recall letters' (selected), 'Envelopes', 'Duty of Care' (checked), 'Phone List (A4 size)', 'Label Printer', 'Label Sheets', 'Ignore Send Queries to', and 'SMS: Include all patients with a Mobile number'. There are buttons for 'SMS', 'E-mail', 'Print...', and 'Delete 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



The screenshot shows a 'Type' dialog box with 'Type Name' set to 'Dental Tips to Active Patients (Automation)'. The 'Duty of Care' checkbox is checked. Below the dialog box, the SQL query is visible: 'last_visit >= DATEADD (month, -18, Now()) and last_visit <=Now()'.

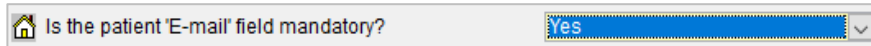
ENHANCEMENT: [Make E-mail address field mandatory](#)

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**



ENHANCEMENT: [Add Items to DEIDC \(De-Identified Data Capture\) for Australian Dental Association](#)

This enhancement isn't visible to the clients using the De-Identified Data Capture (DeIDC) to submit their annual fees survey to ADA.

The following ADA items have been added to export when submitting the **Upload ADA DeIDC data file** report.

- 250- Active non-surgical periodontal therapy - per quadrant
- 251 - Supportive periodontal therapy - per appointment
- 526 - Adhesive restoration - five surfaces -anterior tooth - direct
- 536 - Adhesive restoration - veneer - posterior tooth - direct
- 556 - Tooth-coloured - veneer - indirect
- 586 - Crown - Metallic - with tooth preparation – performed

For more information on the Upload ADA DeIDC data file, please refer to the 'Submit the ADA DeIDC Survey via D4W' how to document from training@centaursoftware.com

ENHANCEMENT: [X-Ray Link Maintenance 'Smartdent/RioView.'](#)

RIOview is a light version of the x-ray imaging software program SMARTDent. These programs operate similar to each other, and therefore we can use the SMARTDent x-ray link for the program RIOview.

To keep a clear understanding of the x-ray links available, we have renamed the option in D4W from Smartdent to Smartdent/RioView.

Previous D4W configuration:

What X-ray / Imaging software is installed = **SmartDent**

New D4W configuration:

What X-ray / Imaging software is installed = **SmartDent/RioView**