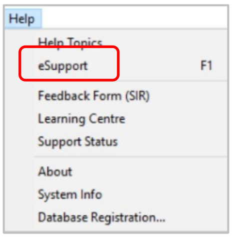
NEW FEATURES AVAILABLE IN Vi5
==== BUILD 4620== Vi5/PB12 ====

NEW: New X-Ray link

A new X-Ray link by ACTEON is now available to integrate with D4W. For more information contact your Sales Rep.

NEW: D4W link to eSupport



eSupport is a self-support site powered by Zendesk created to provide customers with another means of gaining Support, for basic How-To and Troubleshooting issues, without having to call Support. Customers can also submit tickets from the site in place of calling.

Your practice would have received an email with the activation details. If you haven't received an email, please email customerservice@centaursoftware.com

To access the eSupport go to the **Help** menu in D4W > Select **eSupport**

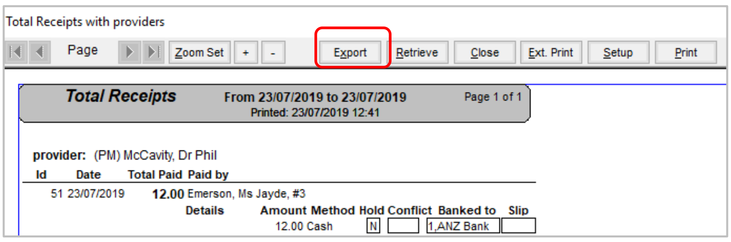
ENHANCEMENT: Export Reports to EXCEL

The following reports are now included in the list of reports available to export to CSV and Excel formats. This change provides users with a better way to analyse the reports generated from the system.

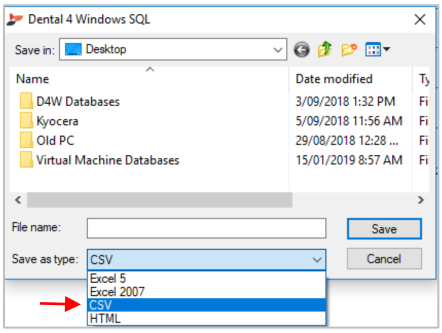
- Fee Level Comparison Report
- Total Receipts
- Total Receipts with providers
- Treatment Incomplete Report
- Appointment Attended with no Treatment recorded

Manually Run a Report

i. Go to **Location Management** > **Reports** tab
ii. Double click on the report
iii. Select report parameters
iv. Press **OK** button
v. Press **Export** button



vi. Select type from the **Save as type** droplist



Automatically Run a Report

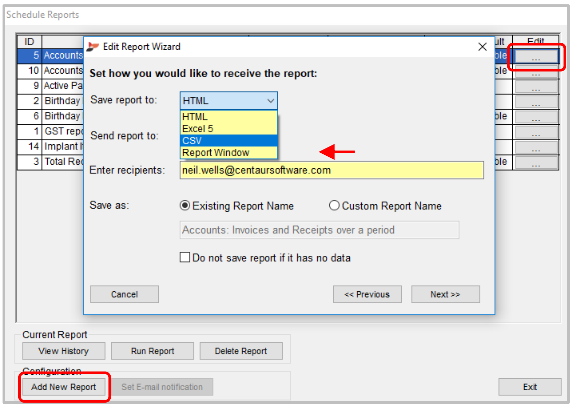
i. Go to **Location Management** > **Reports** tab

ii. Select **Operations** menu > Select **Schedule Reports**

iii. You can add a new report by clicking on **Add New Report** button or

iv. Edit an existing scheduled report/s by clicking on the **Edit** button against each report

v. Move to the below window, then select from the **Save Report to** drop list



More full detail on 'Schedule Reports', please visit eSupport

NEW: Treatment Plan Capture and Reporting

This new feature within the Treatment Plan tab will allow practices to identify the journey of a Treatment Plan from when a plan is presented to a patient to when it has been completed.

This feature will report on plans that have been presented, accepted, rejected and completed as well as allow alternative plans to be created and be marked as inactive after a period.

Setup

A few general settings have been created to control the status of the Treatment Plan.

Setup feature

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

ii. Select **Group: Treatment**

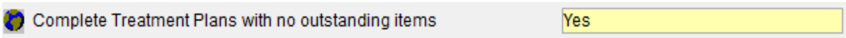
a) **Set printed Treatment Plan to Presented** = **Yes** to automatically mark Treatment Plan status as **Presented** when the plan is printed

b) **Set e-mail Treatment Plan to Presented** = **Yes** to automatically mark Treatment Plan status as **Presented** when the plan is emailed to the patient

c) **Set Treatment Plan for items transferred to Treatment to Accepted = Yes** to automatically mark Treatment Plan status as **Accepted** when there are multiple items in the Treatment Plan and not all items are transferred to Treatment

d) **Setup Treatment Plan with Appointed Items to Accepted** = **Yes** to automatically mark Treatment Plan status as **Accepted** when the plan is attached to the patient's appointment

e) **Complete Treatment Plan with no outstanding items** = **Yes** to automatically mark Treatment Plan status as **Completed** when all items have been transferred

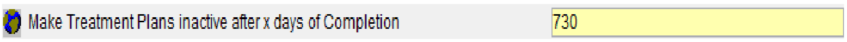


f) **Automatically reject Alternative Treatment Plan = Yes** to automatically mark Treatment Plan status as **Rejected** when at least one item of the alternative treatment has been accepted

g) **Make Treatment Plans inactive after x days of Creating** = **0** (default) change if needed

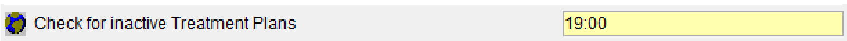
The **Active Treatment Plan** box found **in Treatment Plan** and **Treatment** tabs are automatically unticked after the # days of plan creating

h) **Make Treatment Plans inactive after x days of Completion** = **730** (default) change if needed



The **Active Treatment Plan** box found **in Treatment Plan** and **Treatment** tabs are automatically unticked after the # days of plan completion

i) **Check for inactive Treatment Plan** = **19:00** (default time) change if needed



j) **Treatment Plan Completion item** = No

An item can be setup as **Treatment Plan Complete** item

Treatment Plan Completed Item

When an item is setup as **Treatment Plan Complete** and the General Setting **Treatment Plan Completion item** setting is set to Yes**,** the treatment plan status will automatically be marked as completed when this item is entered in Treatment Plan or Treatment tab.

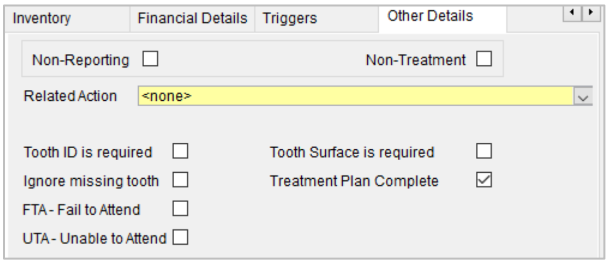
a) Setup Item

i. Go to **Location Setup > Items** tab

ii. Find the item to be marked as completed for the item

iii. Select **Other Details** sub-tab

iv. Tick **Treatment Plan Complete**



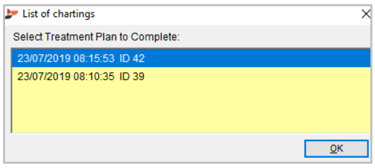
b) Usage

i. **Treatment Plan** tab

When entering the **Treatment Plan Complete** item in **Treatment Plan** tab the status of the plan will automatically change to **Complete**

ii. **Treatment** tab

When entering the **Treatment Plan Complete** item in Treatment tab the following message will appear to select which plan to complete



Security

Restrictions on editing a complete treatment plan and editing inactivate treatment plan have been added to security.

vi. Go to **Location Setup > Security** tab

vii. Select **Record** menu **>** Select **Security Status**

viii. Within the **Treatment** section

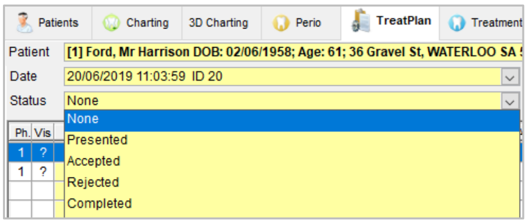
a) **Edit Complete Treatment Plans**

For more information on how to setup Security go to eSupport

Usage

A dropdown list has been added to the Treatment Plan tab to mark the status of a treatment plan.

ix. Go to **Patient Records > Treatment Plan** tab

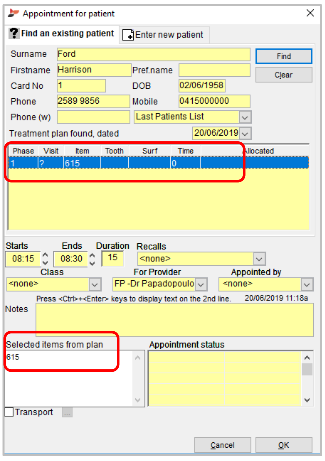


a) **Status Presented**

If the relevant general settings are set to yes the status is automatically marked as **Presented** when a Treatment Plan is printed or emailed to the patient.

b) **Status Accepted**

If the relevant general setting is set to yes the status is automatically marked as **Accepted** when the item/s have been attached to the patient's appointment



c) **Status Rejected**

If the relevant general settings are set to yes the status is automatically marked as **Rejected** when an alternative plan is accepted. Please refer to the Alternative Chart/Plan section on this document.

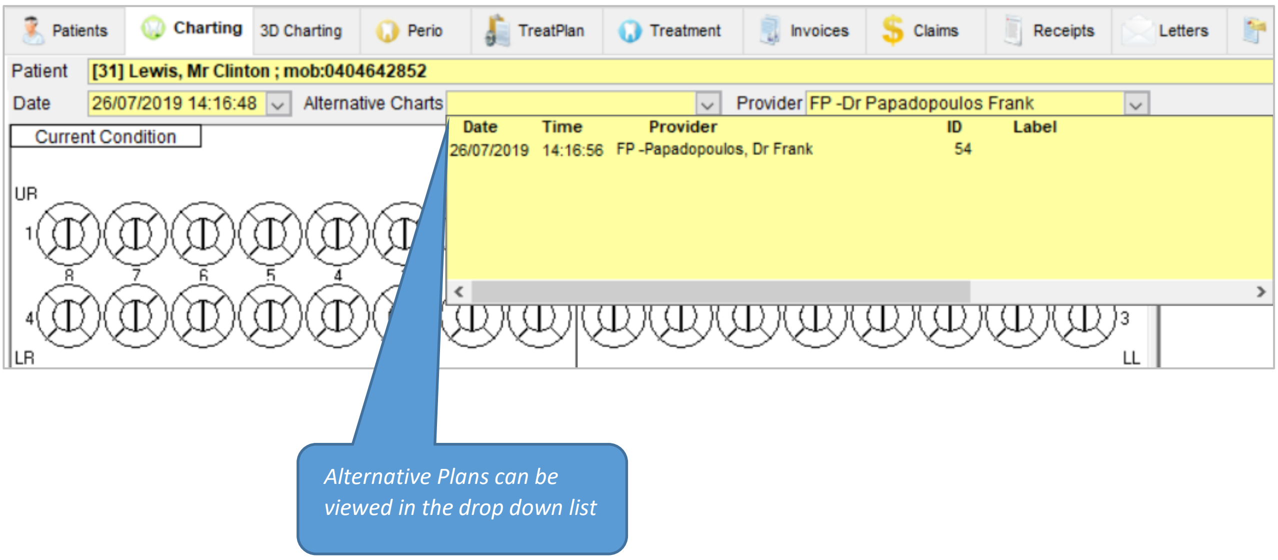
d) **Status Completed**

Depending on the setting for this feature the status is automatically marked as **Completed** when all items are transferred to treatment

Alternative Chart/Treatment Plan

When providing multiple Treatment Plan solutions for a patient you can create an Alternative Plan for the same treatment.

1. Go to **Patient Records** > **2D/3D Charting** or **Treatment Plan** tab
2. Chart or enter the item/s
3. Click **Charting** or **Treatment Plan** menu
4. Select **Create Alternative Chart** or **Create Alternative Treatment Plan**



Reporting

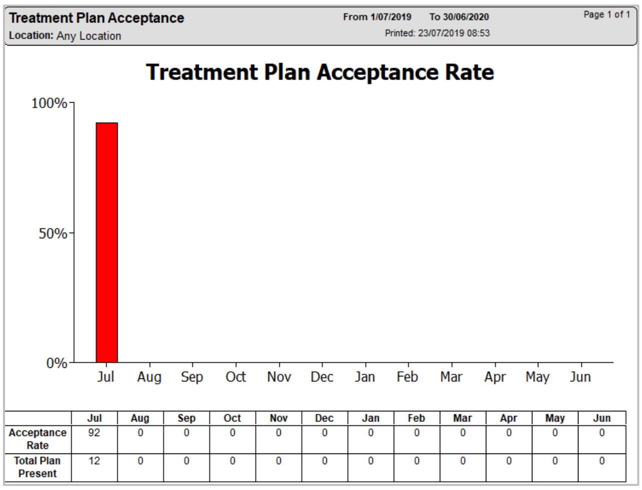
Three reports are available to report on the **Treatment Plan** statuses

a) **Treatment Plan Acceptance** report

1. Go to **Location Management** > **Report** tab
2. Select **Treatment Plan Acceptance**
3. Select report parameters
   i. **Date Range:** Select the year to base this report on
   ii. **Location:** Select the location or <Any Location > from the droplist if applicable
   iii. **Breakdown by Provider:** Tick if show providers details
   iv. **Provider:** Select the provider or <Any Provider > from the droplist
   v. **Show inactive providers as well:** Tick to show inactive providers
   vi. Click **OK** button

Report Details

The report will generate a graphic with the Treatment Plan Acceptance Rate and information on the Presented Plan



Treatment Plan Acceptance From 1/07/2019 To 30/06/2020 Page 1 of 1
Location: Any Location Printed: 23/07/2019 08:53

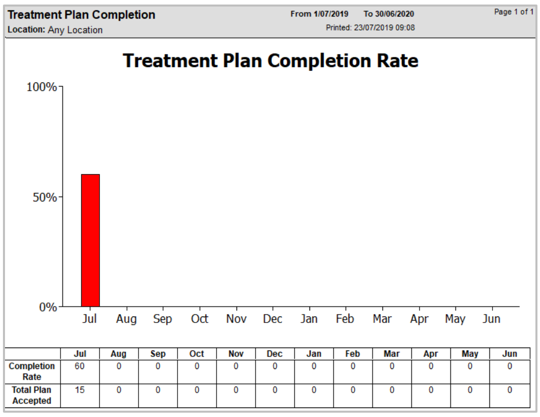
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Acceptance Rate	92	0	0	0	0	0	0	0	0	0	0	0
Total Plan Present	12	0	0	0	0	0	0	0	0	0	0	0

b) **Treatment Plan Completion** Report

1. Go to **Location Management** > **Report** tab
2. Select **Treatment Plan Completion**
3. Select report parameters
4. Press **OK** button
   i. **Date Range:** Select the year to base this report on
   ii. **Location:** Select the location or <Any Location > from the droplist if applicable
   iii. **Breakdown by Provider:** Tick if show providers details
   iv. **Provider:** Select the provider or <Any Provider > from the droplist
   v. **Show inactive providers as well:** Tick to show inactive providers
   vi. Click **OK** button

Report Details

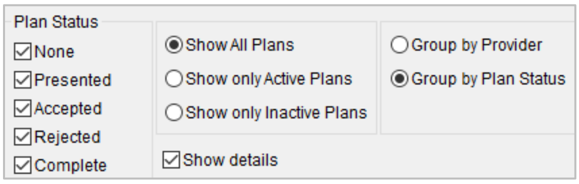
The report will generate a graphic with the Treatment Plan Completion Rate and information on the Accepted Plan



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Completion Rate	60	0	0	0	0	0	0	0	0	0	0	0
Total Plan Accepted	15	0	0	0	0	0	0	0	0	0	0	0

c) Treatment Plan Status Report

1. Go to **Location Management** > **Report** tab
2. Select **Treatment Plan Status**
3. Select the report parameters
   - **i. Date Range:** Select the year to base this report on
   - **ii. Location:** Select the location or <Any Location > from the droplist if applicable



   - **iii. Plan Status:** Select the options to be reported
   - **iv.** Select which plan to report on: **Show All Plan, only Active Plans** or **only Inactive Plans**
   - **v.** Select how to group the report: **Group by Provider** or **Group by Plan Status**
   - **vi. Show details:** See full detail on the report
   - **vii. Provider:** Select the provider or <Any Provider > from the droplist
   - **viii. Show inactive providers as well:** Tick to show inactive providers
4. Click **OK** button Report Parameters

Report Details

The report will show the statuses of the Treatment Plan for a selected period.

TREATMENT PLAN STATUS REPORT From 23/07/2019 to 23/07/2019 Page 1 of 1
All Locations Printed: 23/07/2019 09:32

Accepted

Created date	Plan Acceptance Date	Prv	Patient	Plan Value	Outstanding Value	Percentage Completed	Active Plan
23/07/2019	23/07/2019	FP	Snook, Sam #39	0.00	0.00	50.0%	Y

Rejected

Created date	Plan Rejection Date	Prv	Patient	Plan Value	Outstanding Value	Percentage Completed	Active Plan
23/07/2019	23/07/2019	PM	Emerson, Master Bob #35	0.00	0.00	0.0%	N
23/07/2019	23/07/2019	FP	Snook, Sam #39	0.00	0.00	0.0%	N

Completed

Created date	Plan Completion Date	Prv	Patient	Plan Value	Outstanding Value	Percentage Completed	Active Plan
23/07/2019	23/07/2019	PM	Emerson, Master Bob #35	0.00	0.00	100.0%	N
23/07/2019	23/07/2019	PM	Emerson, Master Bob #35	0.00	0.00	0.0%	Y
23/07/2019	23/07/2019	FP	Snook, Sam #39	0.00	0.00	50.0%	Y
23/07/2019	23/07/2019	FP	Snook, Sam #39	0.00	0.00	100.0%	Y

ENHANCEMENT: Discounts for promotions

An enhancement has been done to the Promotion feature to allow practices to apply no gap promotion to an invoice or use the promotion after processing the Health Fund claim and apply the discount to the gap amount.

For full detail on this feature, please request the 'Working with Promotion' how to document.

ENHANCEMENT: eChat: Enhancements to Patient Arrived

The feature that allows D4W to notify the provider when a patient has arrived for their appointment has been enhanced to provide practices with options on this feature setup.

Activation

1) **Turn on feature**

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

   ii. Select **Group: Communication setting** to activate eChat

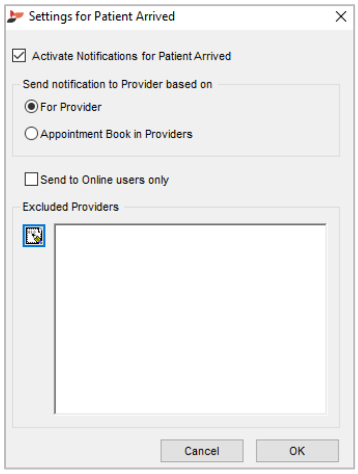
   iii. Turn on **User eChat**

Set up

   i. Go to **Location Setup** > **System Tables** tab

   ii. Select **System Tables: Notifications**

Notification	Settings	Active
Automation Events		Y
Patient Arrived		N



iii. **Patient Arrived** > Click on **Setting**

iv. Tick **Activate Notifications for Patient Arrived** to activate this feature

v. Select your preferences on how and who to receive notifications

vi. Press **OK** button

ENHANCEMENT: Automation: Notify on Batch Processing

It has been introduced to D4W a notification feature for when automated batches had run.

Activation

2) **Turn on feature**

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

ii. Select **Group: Automation** to activate Automation

If you are not using automation to send your Appointments, Recalls or Queries reminders, please contact Centaur software for more information on the capability of this feature

iii. Select **Group: Communication setting** to activate eChat if you wish to have the notifications sent via eChat

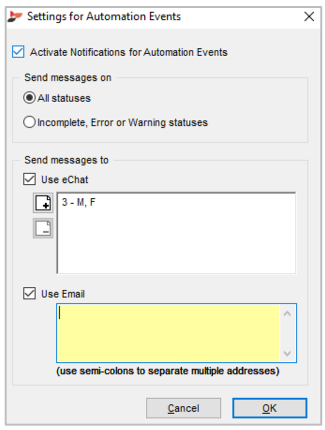
iv. Turn on **User eChat**

Set up

vii. Go to **Location Setup** > **System Tables** tab

viii. Select **System Tables: Notifications**

Notification	Settings	Active
Automation Events		Y
Patient Arrived		N



ix. **Automation Events** > Click on **Setting**

x. Select your preferences on when and where to send the notifications

xi. Press **Ok** button

ENHANCEMENT: Automation: Enhance Setting so that Daily batches can run when multiple types exist

An enhancement within the Automation feature has been introduced to allow daily batches to run over multiple types. In conjunction with this feature any empty batches can be now marked as complete.

Any modification on your Recalls automation schedule should be discussed with our Centaur Support team.

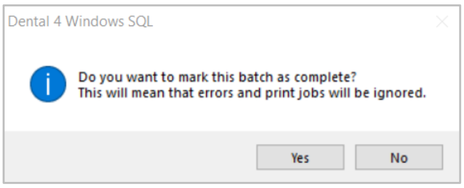
a) Schedule Setup

New schedule parameter has been added to allow capture more than 30 days in the past or future

1. Go to **Location Management >** Select **Automation** tab
2. Select **Appointments or Recalls** sub-tab
3. Click **Schedule** sub-tab
4. **Under Include Patients who have Recalls Dates** > Click **Advanced** > Select **is**

b) Monitor batches

5. Go to **Location Management >** Select **Automation** tab
6. Select **Batches** sub-tab
7. Click **Processed Batches**
8. Click on the Empty Batch
9. Click **Mark Batch as Complete** button
10. Click **Yes** to the message



ENHANCEMENT: Display eServices Family Head info with Family Member record – 22679

When a new family member is created in eServices without a mobile number the system will automatically assign the family head's mobile number.

In the case where a conflict may occur the details of that appointment will be displayed in a new column within the D4W **Appointment Book** > **View Online Booking** > **Patient Conflict** tab