# Solutions Enabling Success

# 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 <u>customerservice@centaursoftware.com</u>

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

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	Page	▶ ▶ <u>Z</u> oom	Set + -	Export	<u>R</u> etrieve	<u>C</u> lose	Ext. Print	<u>S</u> etup	Print
r	Total F	Receipts	From 23/07/	2019 to 23/07/2	019	Page 1 of	1		
			Printed: 2	23/07/2019 12:41		Ĩ			
Drow	vider: (PM	) McCavity Dr P	bil						
Id	Date	Total Paid Pai	d by						
5	1 23/07/201	19 12.00 Em	erson, Ms Jayde,	#3					

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

Help Topics	
eSupport	F1
Feedback Form (S	IR)
Learning Centre	
Support Status	
About	
System Info	
Database Registrat	tion



📂 Dental 4 Windows SQL			$\times$
Save in: Esktop	~ G 🦻	► 🔝 🏷	
Name	Date mo	dified	Ту
D4W Databases	3/09/201	18 1:32 PM	Fi
Kyocera	5/09/201	18 11:56 AM	Fi
Old PC	29/08/20	)18 12:28	Fi
Virtual Machine Databases	15/01/20	019 8:57 AM	Fi
<			>
File name:		Save	
Save as type: CSV	$\sim$	Cancel	
Excel 5 Excel 2007			-
HTML			

#### 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

Schedul	e Reports			
ID 5	Accounts	📂 Edit Report Wizar	d X	ult Edit
10	Accounts Active Pa	Set how you wou	Id like to receive the report:	
2 6 1 14 3	Birthday Birthday GST repo Implant I Total Rec	Save report to: Send report to: Enter recipients:	HTML  HTML Excel 5 Excel 5 Excel 5 Excel 5 Excel 4 HTML HTML HTML HTML HTML HTML HTML HTML	DIE DIE
		Save as:	Existing Report Name     Ocustom Report Name     Accounts: Invoices and Receipts over a period     Do not save report if it has no data	
		Cancel	<< Previous Next >>	
Curr	rent Repor View Histor	rt ry Run Report	Delete Report	
Ac	figuration Id New Rep	Set E-mail noti	fication	Exit

# 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.

#### <u>Setup</u>

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







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

Inventory	Financial Details	Triggers	Other Deta	ils	4
Non-Reporting		N	Ion-Treatmer	nt 🗆	
Related Action	<none></none>				~
Tooth ID is requi	red 🗌	Tooth Surface is	required		
Ignore missing t FTA - Fail to Atten	ooth 🗌	Treatment Plan	Complete	$\checkmark$	
UTA - Unable to A	Attend 🗌				

#### 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

List of chartings	>
Select Treatment Plan to Complete:	
23/07/2019 08:15:53 ID 42	
23/07/2019 08:10:35 ID 39	
	ОК

#### **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

#### <u>Usage</u>

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

🤶 Patie	🕺 Patients 🛛 😳 Charting		3D Charting 🕠 Perio		🥼 TreatPlan	Treatment					
Patient	[1] F	[1] Ford, Mr Harrison DOB: 02/06/1958; Age: 61; 36 Gravel St, WATERLOO S.									
Date	20/0	6/2019 11:03:5	9 ID 20			$\sim$					
Status	Non	e				~					
	Non	ie									
Ph. Vis	Pres	sented									
1 7	Acce	epted									
1 ?	Reje	ected				-					
	Con	npleted									

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

	ixisung par	nem L	+Enter new	patient			
Sumame	Ford					Find	
Firstname	Harrison		Pref.name			Cjear	
Card No	1		DOB	02/06/195	8		
Phone	2589 9856		Mobile	04150000	00		
Phone (w)			Last Patie	nts List	~	/	
Freatment p	lan found,	dated		20/06/	2019	/	
Phase Vis	it item	Tooth	Surf	Time		located	
1 ?	615		0	)			
tarts	Ends I	D <u>uratio</u> r	Recalls				
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tarts 08:15 0 Cla	Ends 08:30 55	Ouration	Recalls	er 10ulo y	App	iointed by	
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# 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



# 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



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# **Report Details**

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

Treatment Plan Completion Location: Any Location						From 1/07/ Pi	2019 To rinted: 23/0	5 30/06/202 7/2019 09:0	1 <b>0</b> 16		Page 1 of 1	
		Tr	eatr	nent	Pla	n Co	mple	etion	Rat	е		
100%-												
50%-												
0%	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr I	May Ji	un
	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

Plan Status		
None	Show All Plans	O Group by Provider
Presented	O Show only Active Plans	Group by Plan Status
Accepted	⊖ Show only Inactive Plans	
✓ Rejected ✓ Complete	Show details	

- 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

Plan Status ♥ None ♥ Presented ♥ Accpeted	<ul> <li>Show All Plans</li> <li>Show only Active Plans</li> <li>Show Only Inactive Plans</li> </ul>	<ul> <li>Group by Provider</li> <li>Group by Plan Status</li> </ul>
Rejected		

# **Report Details**

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





TREATMEN All Locations	NT PLAN STATUS F	REPO	RT	From 23/07/2019 to 23/07/2019 Page 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



#### <u>Set up</u>

- i. Go to Location Setup > System Tables tab
- ii. Select System Tables: Notifications





Notification	Settings	Active
Automation Events	3	Y
Patient Arrived	3	Ν

- 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

-	Turn on Automotion	Ma a	
0	Turn on Automation	res	$\sim$

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

🔵 Use eChat	Yes
-------------	-----

# Set up

vii. Go to Location Setup > System Tables tab

#### viii. Select System Tables: Notifications

Notification	Settings	Active	
Automation Events	3	Y	
Patient Arrived		Ν	

- ix. Automation Events > Click on Setting
- x. Select your preferences on when and where to send the notifications
- xi. Press Ok button

Settings for Automation Events	×
Activate Notifications for Automation Events	
Send messages on	
All statuses	
O Incomplete, Error or Warning statuses	
Send messages to	
Use eChat	
3 - M, F	
Use Email	
I	~
(use semi-colons to separate multiple addresses)	
<u>C</u> ancel <u>O</u> K	



Settings for Patient Arrived	×					
Activate Notifications for Patient Arrived						
Send notification to Provider based on						
For Provider						
O Appointment Book in Providers						
Send to Online users only						
Excluded Providers						
	_					
Cancel O	к					



# 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

🥙 eServices Management Console											
	Appointments	Appointment C	conflicts Patier	nt Conflicts							
A new patient was created for this eServices user, but a possible match to an existing patient has been detected. Select a possible match and "Merge to existing patient" to complete the match or choose to "Keep new patient".											
		eS	ervices						Possible record ma	tches	
	Name	Dob	Mobile	E-mail	Head data	Name	DOB	Mobile	E-mail	Last Treatment	Address
	Test Dbdental	17/02/1984	000000061	one@one.net		Trent Baker					
						Trent Baker					
	Trent Baker	28/02/1991	000000053	treat@treat.treat		Test Dbdental	17/02/1984	000000061	one@one.net		1 One Street, SUCCESS, WA, 6164
eServices Family Head Title: Mr Name: Jack Jones DOB: 01/01/1990 Mobile: 0414 111 111 E-mail: jack@ispo.com											

