2011

# Release Notes

DAISY 4.1

## NEW FEATURES

- Pop-up reminders
- Online eligibility inquiries
- Maintenance items

Printed in the United States of America

# DAISY 4.1 Update
## Release Notes

CHAPTER 1

# What's New in DAISY 4.1

## New Features

### Pop-up Reminders

Reminders attached to patients or accounts now open in a pop-up dialog box. The Reminder dialog box opens whenever you access a patient or account that has a reminder attached to it.

In addition, when you access a window associated with a patient, such as the Treatment Plan window, reminders attached to the patient's account also open in a pop-up dialog box.

For more information, see "Pop-up Reminders" on page 5.

### Online Eligibility Inquiries

Online eligibility inquiries through Emdeon are now available. Inquiries are made using a new Request Benefit Information icon ( ) on the Quick Access toolbar on several DAISY windows.

The Request Benefit Information icon is active only if the company that provides the patient's insurance coverage participates in Emdeon's electronic eligibility inquiry program. Inquiry requests are sent and received via the Internet.

For more information, see "Online Eligibility Inquiries" on page 13.

If you are interested in subscribing to this service, contact DAISY Sales at 503.765.3471 or daisysales@dmcdental.com.

# Other Enhancements and Fixes

## Accounts

- The patient's age has been added to the Account window under the Patients tab. The patient's age shows in the Age column.

## Appointments

- The patient's gender now shows in the Confirm Appointments and Follow Up Appointments windows.
- Past appointments for deleted patients now remain on the schedule, but with the following changes:
  - In the Appointment window, the patient status changes from On File to New.
  - In the Schedule window, the appointment shows the New Patient (Not on File) icon ( ).
- Users can now access patient details (clinical notes) from the Quick Access toolbar in the Schedule window by using the Details icon ( ). The icon only shows if an appointment is selected.

## Chart

- The patient's age now shows in the Chart window to the left of the preferred account number.
- During a pass that is not a full quadrant (e.g., the Furcation pass), the Perio exam window now shows the teeth in the correct position.

## Ledger

- In the Ledger window, entries can now be sorted either by ascending (oldest to newest transaction) or descending order. For more information, see "Modify the Order of Ledger Entries" on page 16.
- The Name column of the Ledger window now displays the patient's full name, including middle initial and suffix.

## Mail Merge

- A new Mail Merge template enables you to create a #10 business envelope addressed to a referring provider. For more information, see "Generate a Referring Provider Envelope" on page 18.

## Medical Claims

- In the Claims window and the Claims History window, the medical claim form available for printing from the Reports menu has been updated to the current CMS-1500 format. In addition, a new option has been added to allow users to choose whether to print the form background or to print data only.
  - For Medicare claim submissions, use the "Medical – Data Only (Medicare)" option. Medicare requires the exact color of red used on pre-printed CMS forms available from business supply sources.
  - To submit claims to all insurance companies except Medicare, use the "Medical" option, which now includes the form background.

## Patient

- The patient's age now shows in the Patient window to the right of the patient's birth date.

## Clinical Details

- Users can now clear responses from a drop-down list or radio button group in a clinical details form or when filling out a Details template. Cleared responses in a *saved* Clinical Details form are added to the form's revision history. For more information, see "Clear Responses from Clinical Details Forms" on page 17.

## Recall Manager

- The patient's cell phone number now shows in the DAISY Recall Manager window under the Patient tab.

## Reports

- The patient's cell phone number now shows in the following reports:
  - Patient Profile (R1003)
  - Patient List (R1004)
  - Recall by Patient (R1011)
- The patient's Social Security Number has been removed from the following reports:
  - Account Notes (R3012)
  - Acct/Patient (R1001)
  - Financial Arrangement for Account with insurance (R2011)
  - Financial Arrangement for Account without insurance (R2012)
  - Patient Chart (R2601)
  - Patient Medical Alerts (R1023)
  - Patient Notes (R3013)

  - Patient Phones (R1006)
  - Patient Profile (R1003)
  - Patient Tags (R1024)
  - Tag Detail List (R1022)
- When a check number is entered in the Check ID column in the Payments tab in the Transactions window, the check number is now included in the following reports:
  - Visit Summary (R2142)
  - Visit Summary with Patient Responsibility (R2143)
  - Account History (R2141)
  - Account Ledger (R2140)
- The Tx Plan Proc. Not Done report (R2003), located in the Treatment Plans folder, now includes tooth numbers and quadrants.
- The Periodontal Graphic Chart (R2701) now has Preview and Archive options.

## Search

- Users can now search for the patient's cell phone number in the Search For – Patient and Search for – Person windows. In the search results, a new Cell Phone No. column shows the patient's cell phone number.

## Third-Party Integration

- The Open 3rd Party Charting icon (  ) is now available on the Quick Access bar in the following windows:
  - Chart
  - Treatment Plan
  - Appointment
  - Schedule

## Transactions

- The Transactions window has two new icons on the Quick Access toolbar:
  - The Account icon (  ), which opens the Account window.
  - The Person (  ) icon, which opens the Person window.

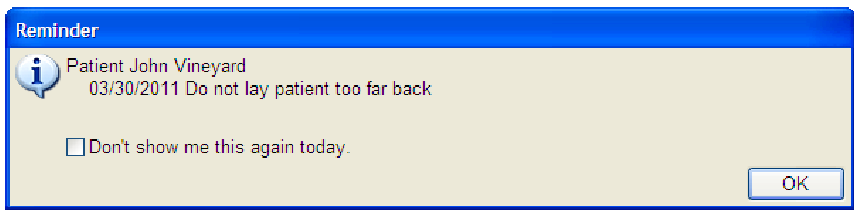
CHAPTER 2

# Pop-up Reminders

## Overview

### Patient Reminders

Starting with DAISY 4.1, patient reminders now open in a pop-up dialog box.



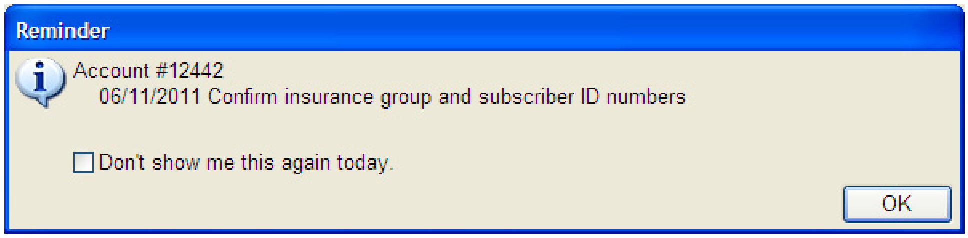

The Reminder dialog box opens whenever you access a patient record that has a reminder attached to it. Reminders attached to the patient open in this dialog box when you access the following patient-related windows:

- Patient
- Patient History
- Treatment Plan
- Chart
- Perio Exam
- Appointment Detail, either when you:
    - Open this window with an appointment already selected in the Schedule.
    - Select the patient in the Appointment Detail window.

In the Reminder dialog box, you can check the “Don’t show me this again today” check box to dismiss a particular reminder for the rest of the day. This setting is user specific per workstation.

### Account Reminders

Also starting with DAISY 4.1, you can add reminders to accounts. Account reminders open in a Reminder pop-up dialog box.




Reminders attached to an account open in the Reminder dialog box when you access the following account-related windows:

- Account
- Ledger

In addition, reminders attached to the patient's account open in a pop-up dialog box when you access the following windows associated with that patient:

- Patient
- Patient History
- Treatment Plan
- Chart
- Perio Exam
- Appointment Detail, either when you:
  - Open this window with an appointment already selected in the Schedule.
  - Select the patient in the Appointment Detail window.

In the Reminder dialog box, users can check the "Don't show me this again today" check box to dismiss a particular reminder for the rest of the day. This setting is user specific per workstation.

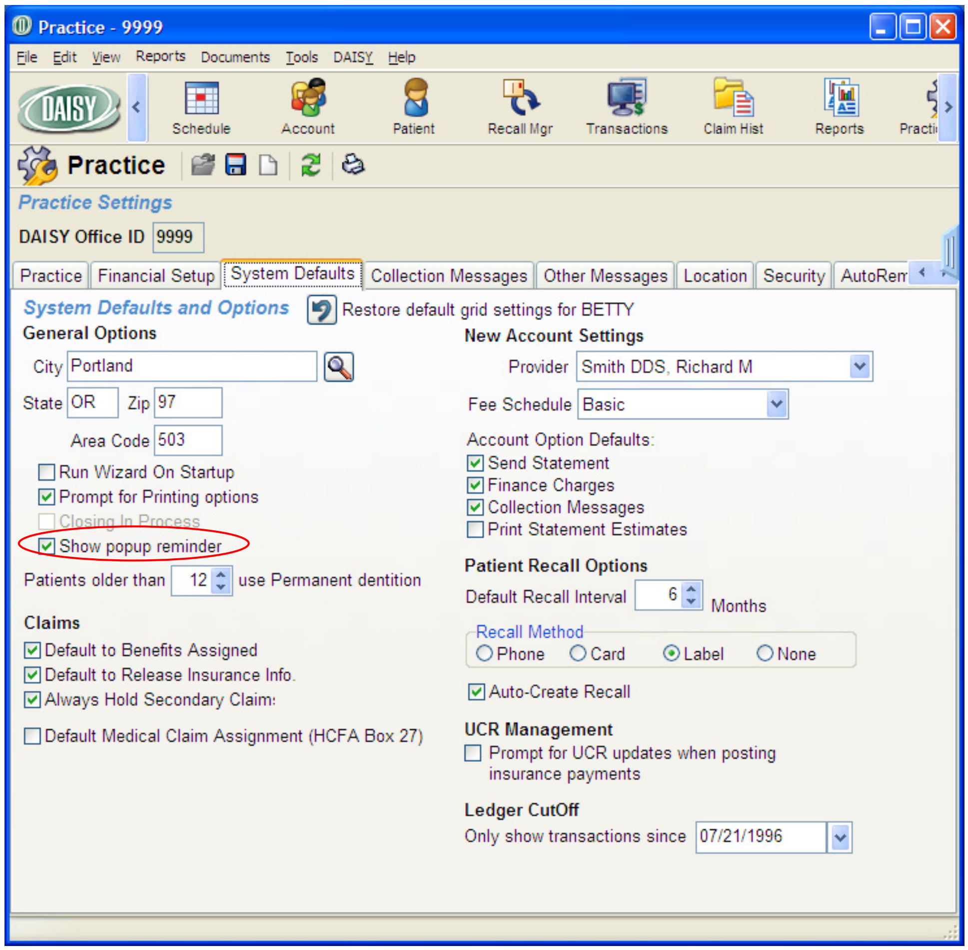
# Enable Pop-up Reminders

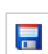
◆ **To enable pop-up reminders for the practice:**

1 **From the DAISY menu, select Configure, then select Practice Config.**

2 **In the Practice window, click the System Defaults tab.**

3 **Check the “Show popup reminder” check box.**



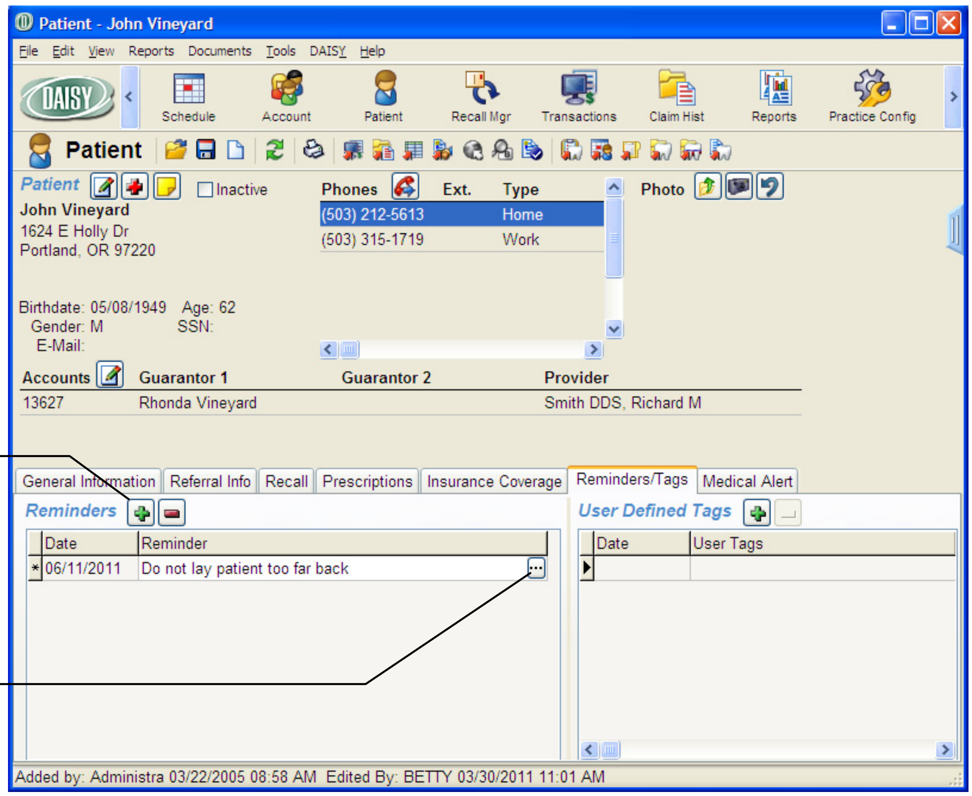

4 **Click**  **, then close the window.**

# Add a Patient Reminder

Users can add, edit, or delete patient reminders from the Reminders/Tags tab in the Patient window. Each reminder is limited to 60 characters, including spaces.

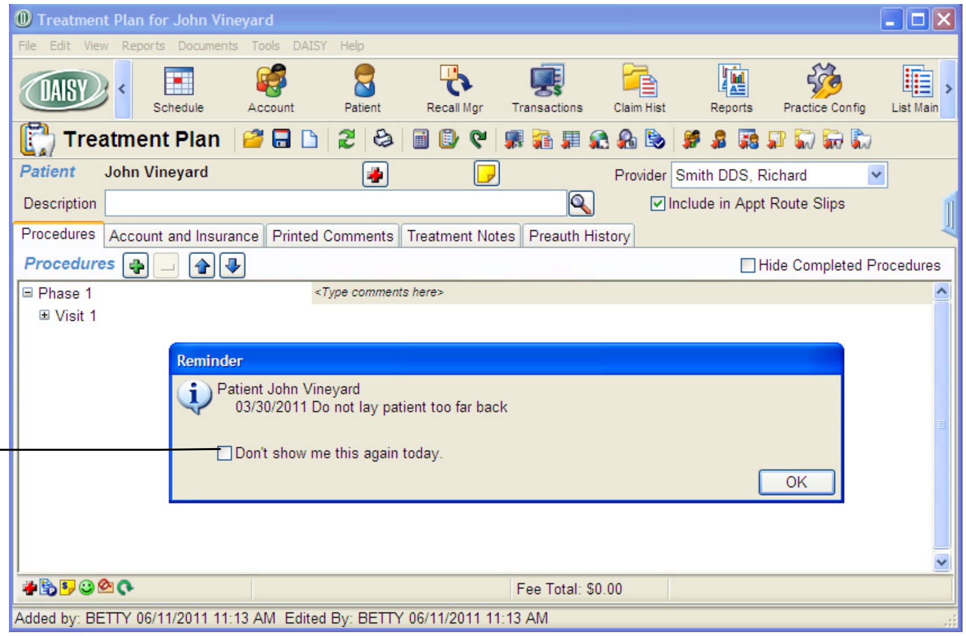
◆ **To add a reminder for a patient:**

1. **From the DAISY toolbar, click .**
2. **Search for and select the patient, then click OK.**
3. **In the Patient window, click the Reminders/Tags tab.**
4. **In the Reminders section, click .**




5. **In the Date column, type a different date, if needed.**
6. **Press Tab to move to the Reminder column.**
7. **Do one of the following:**
   - Type a reminder for this patient.
   - Click the Reminder column, click , select a reminder from the list, then click OK.
8. **Click , then close the window.**

Once the patient reminder is added, the reminder pops up whenever you open a patient-related window for the patient, such as the treatment plan.




To dismiss the reminder for the rest of the day, check this check box, then click OK. The setting is user specific per workstation

**Note.** Patient reminders are included in the Patient Profile report.

# Delete a Patient Reminder

◆ **To delete a reminder for a patient:**

1 **From the DAISY toolbar, click .**

2 **Search for and select the patient, then click OK.**

3 **In the Patient window, click the Reminders/Tags tab.**

4 **In the Reminders section, select the reminder to delete, then click .**

5 **In the Confirm dialog box, click Yes.**

# Add an Account Reminder

Users can add, edit or delete account reminders from a new Reminders tab in the Account window. Each reminder is limited to 60 characters, including spaces.

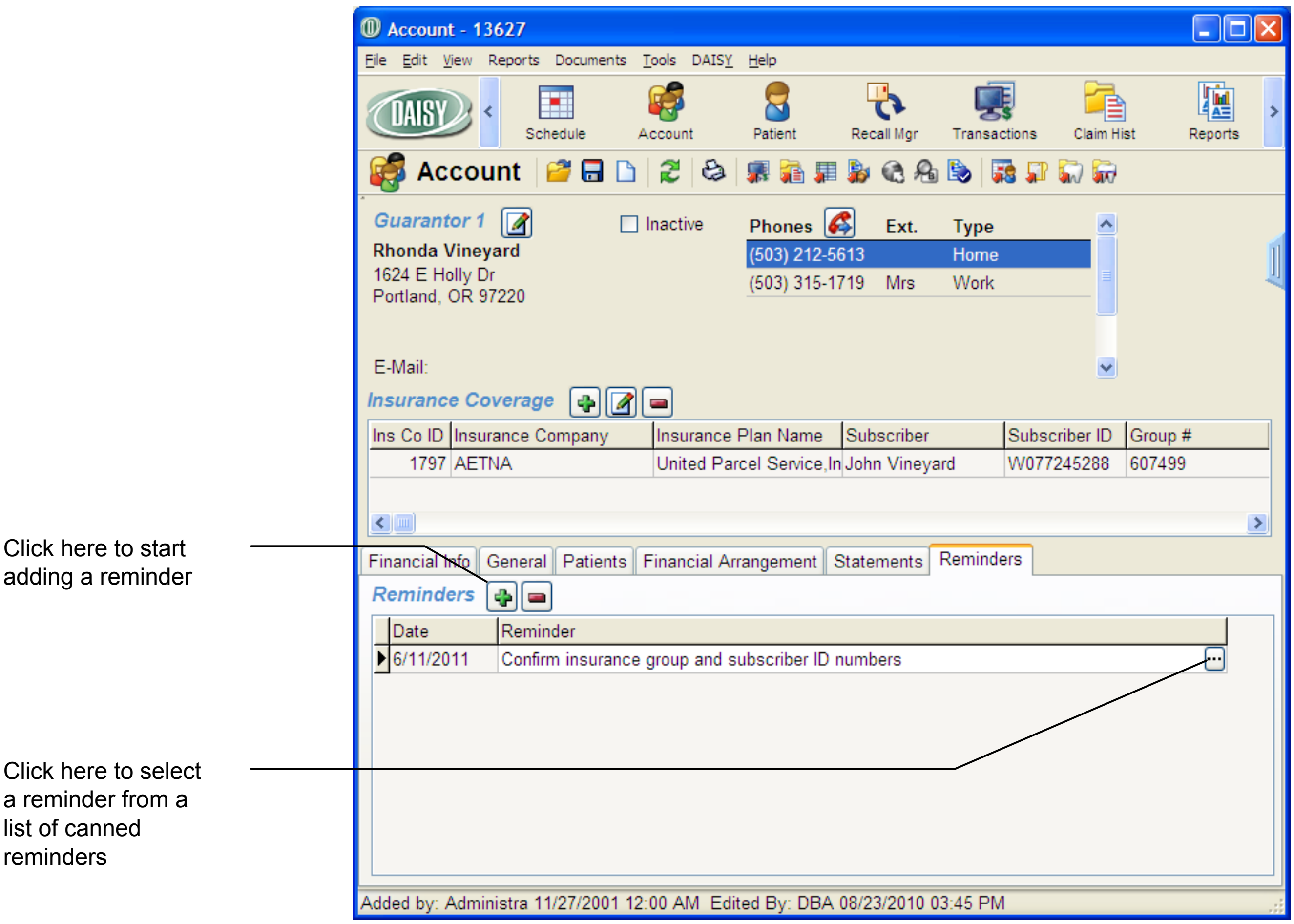
◆ **To add a reminder to an account:**

1 **From the DAISY toolbar, click .**

2 **Search for and select the account, then click OK.**

3 **In the Account window, click the Reminders tab.**

4 **In the Reminders section, click .**




5 **In the Reminder column, do one of the following:**

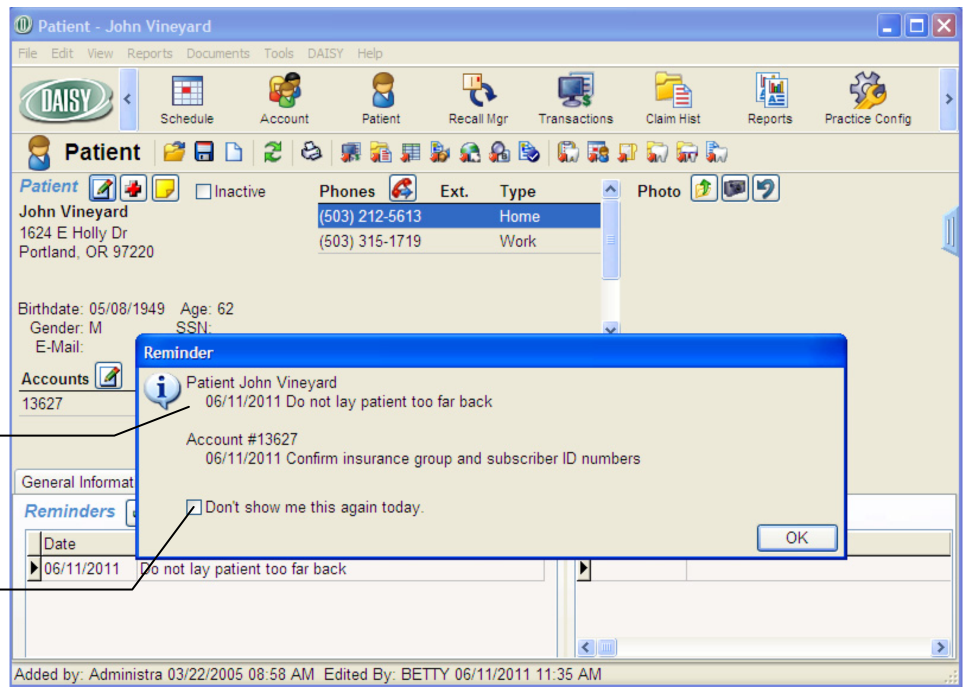
- Type a reminder for this account.
- Click  and select canned text for the reminder.

6 **Click , then close the window.**

Once the account reminder is added, the reminder pops up whenever you open:

- An account-related window for the account, such as the Account or Ledger window.
- A patient-related window, such as Treatment Plan, for the account's guarantor or any patient on the account.

In the following example, Rhonda Vineyard's account has a reminder. Her account includes her husband, John Vineyard. When John's patient window is opened, both his patient reminder and Rhonda's account reminder show in his Reminder pop-up window.

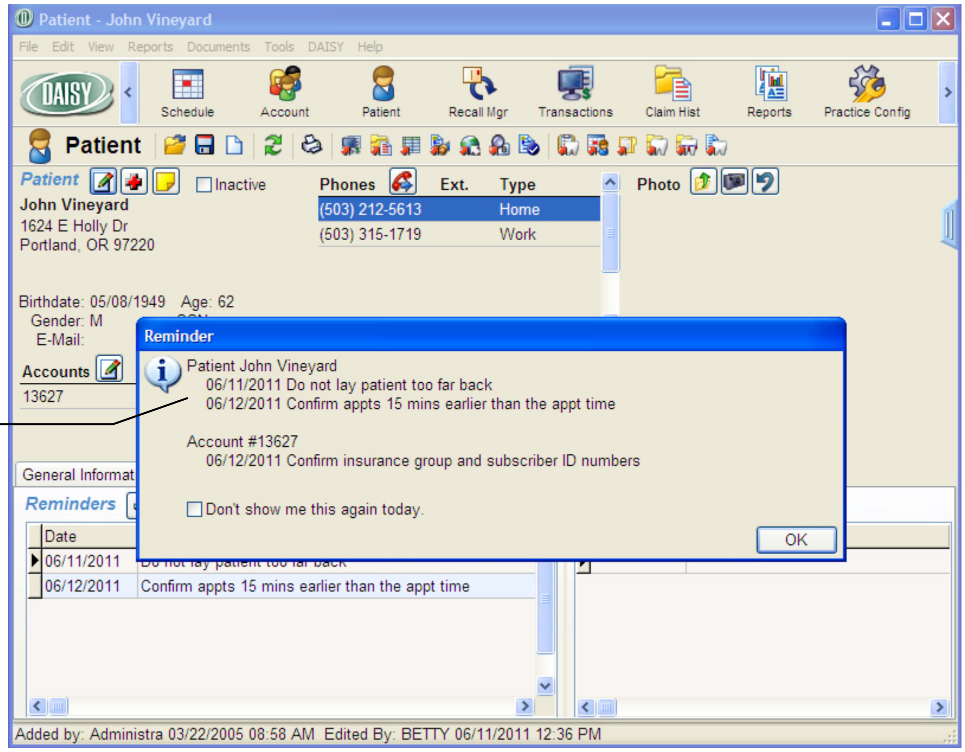



Patient reminders are listed first

To dismiss the reminder for the rest of the day, check this check box, then click OK. The setting is user specific per workstation

In the Reminder pop-up window, patient reminders are listed first. If the patient or account has more than one reminder, the reminders are listed in date order.

Reminders of the same type are listed in date order (oldest to newest)




# Delete an Account Reminder

◆ **To delete a reminder for an account:**

1 **From the DAISY toolbar, click .**

2 **Search for and select the account, then click OK.**

3 **In the Account window, click the Reminders tab.**

4 **In the Reminders section, select the reminder to delete, then click .**

5 **In the Confirm dialog box, click Yes.**

## CHAPTER 3

# Online Eligibility Inquiries

Online eligibility inquiries through Emdeon are available via the Request Benefit Information icon ( ) on the Quick Access toolbar from the following DAISY windows:

- Account
- Patient
- Schedule
- Appointment Detail
- Treatment Plan
- Insurance Coverage

The Request Benefit Information icon is active only if the company that provides the patient's insurance coverage participates in Emdeon's electronic eligibility inquiry program, otherwise the icon is grayed out.

Inquiry requests are sent via the Internet and are processed within approximately six seconds.

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**Note.** The format of eligibility information may be different for each insurance company.

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When the first patient on the day's appointment schedule is checked for benefits, DAISY automatically checks all the other patients with appointments scheduled that day who are eligible for online benefit checking. DAISY caches the results for seven days. Caching of eligibility information enhances the performance of online inquiries.

The cache is emptied for a specific patient after the seven-day period or if any of the following events occur:

- The subscriber ID for the coverage changes.
- The insurance company on the plan changes.
- The insurance is removed or deleted from the patient record.
- The group number is changed.
- Participating provider information is changed on the plan.

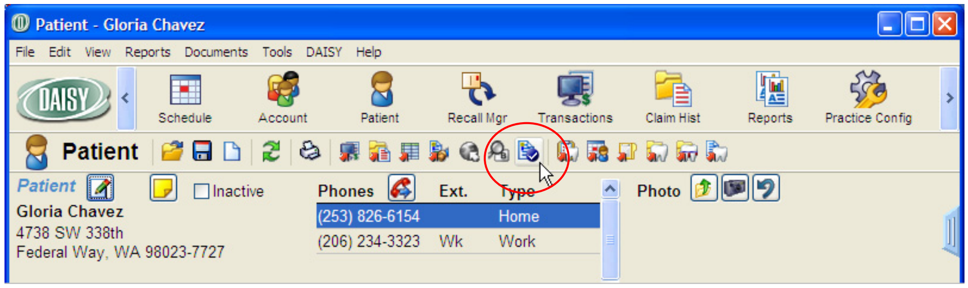
Here is an example of an eligibility inquiry initiated from the Patient window.

◆ **To make an online eligibility inquiry from the Patient window:**

1 **From the DAISY toolbar, click .**

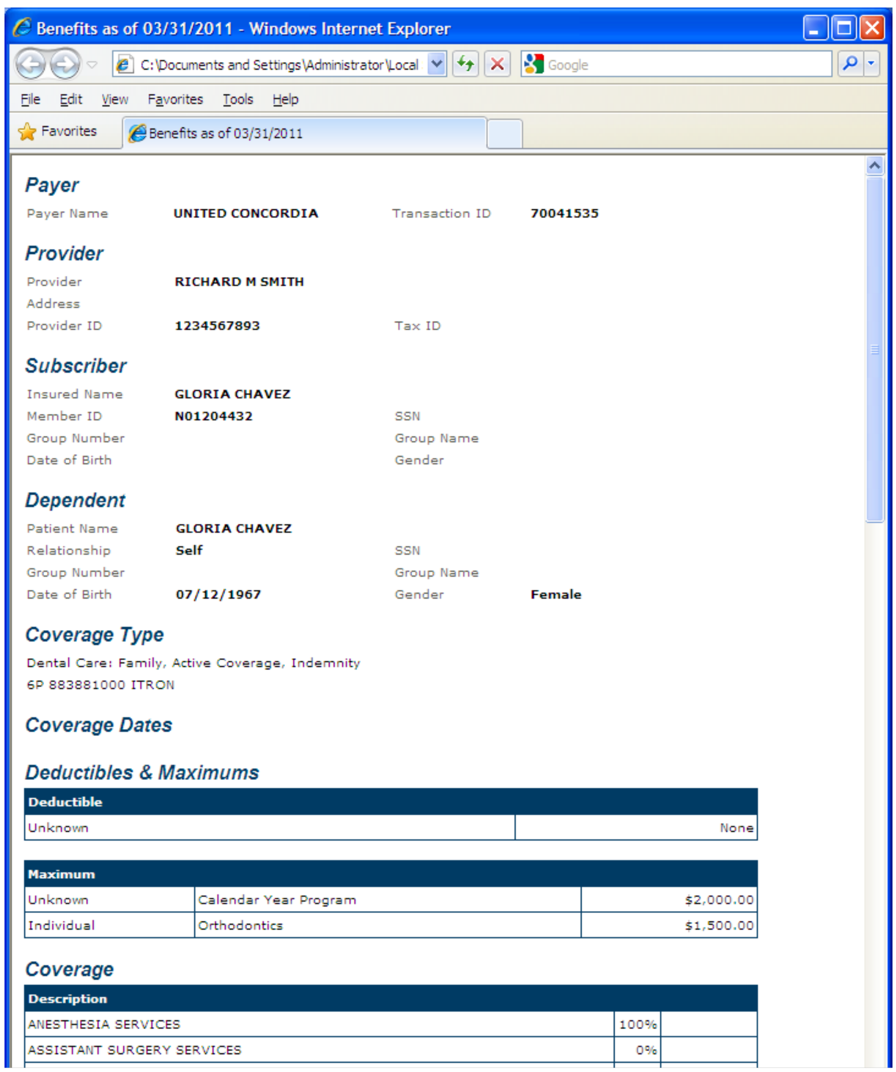
2 **Search for and select the patient, then click OK.**

3 **In the Patient window, click .**




Your default web browser opens and the inquiry begins. You see the results in the browser window.

The format of eligibility information may be different for each insurance company



In DAISY windows that have multiple patients listed, such as the Account or Insurance Coverage, select the patient to check his or her eligibility

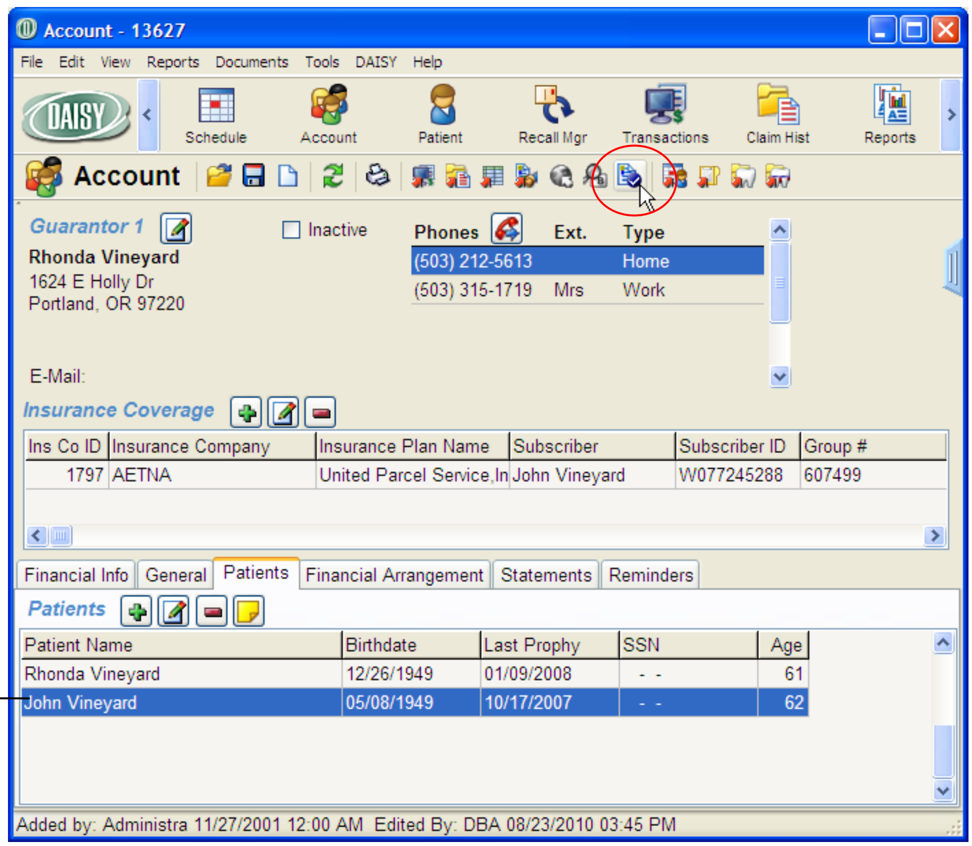
Here is an example of an eligibility inquiry that is initiated from the Account window. The guarantor is Rhonda Vineyard and the inquiry is for John Vineyard.

◆ **To make an online eligibility inquiry from the Account window:**

1 **From the DAISY toolbar, click**  **.**

2 **Search for and select the account, then click OK.**

3 **In the Account window, select the patient, then click**  **.**




When multiple patients are listed, select the patient whose benefits need to be checked

Your default web browser opens and the inquiry begins. You see the results in the browser window.

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**Note.** If you are interested in subscribing to this service, contact DAISY Sales at 503.765.3471 or daisysales@dmcdental.com.

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CHAPTER 4

# Other Enhancements

## Modify the Order of Ledger Entries

In the Ledger window, entries can now be sorted either by ascending (oldest to newest transaction) or descending order. Descending order is the default setting.

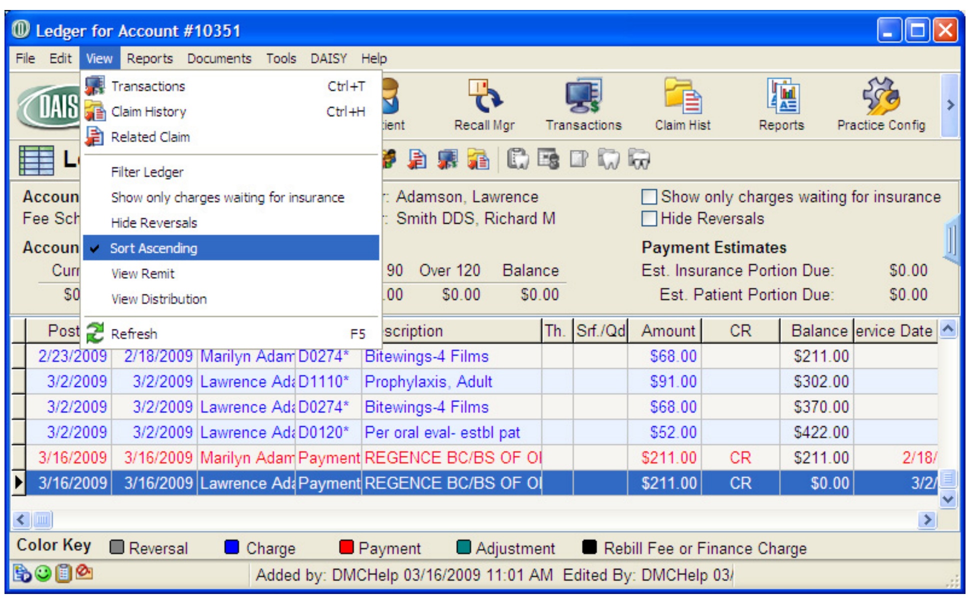
◆ **To sort the Ledger by ascending order:**

1 **From the DAISY menu, select Account, then select Ledger.**

2 **Search for and select the account, then click OK.**

3 **From the View menu, select Sort Ascending.**

When this menu option is set to ascending order, the window automatically scrolls to the bottom of the transactions list to keep the focus on the latest entry.




**Note.** The Sort Ascending menu option is user specific per workstation.

# Clear Responses from Clinical Details Forms

Users can now clear responses from a drop-down list or radio button group in a clinical details form or when filling out a Details template.

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**Note.** Cleared responses in a saved clinical details form are added to the form's revision history.

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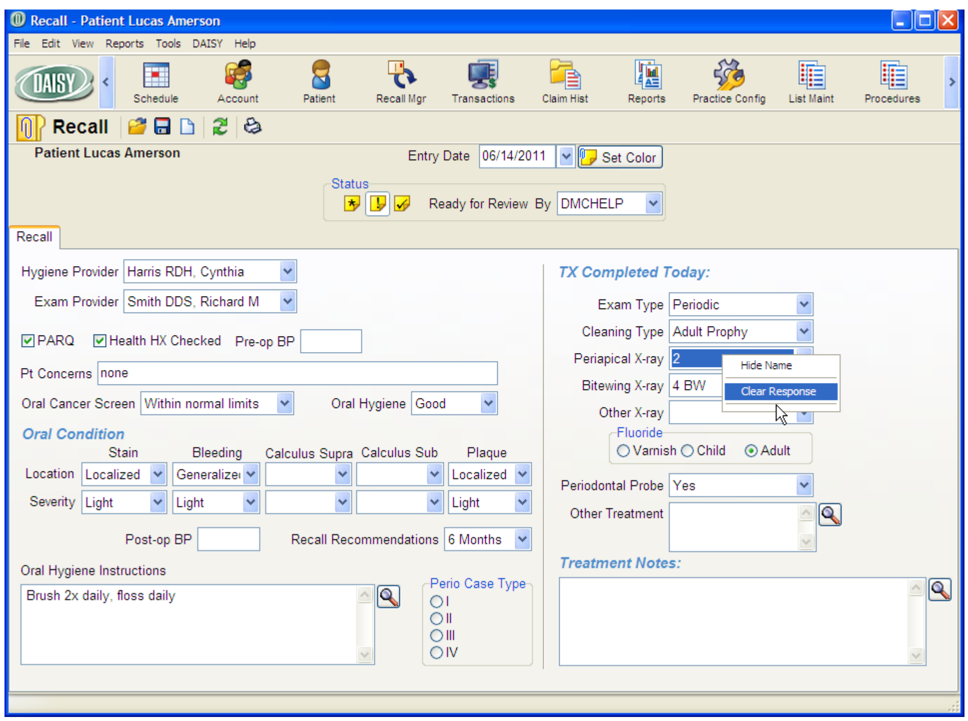
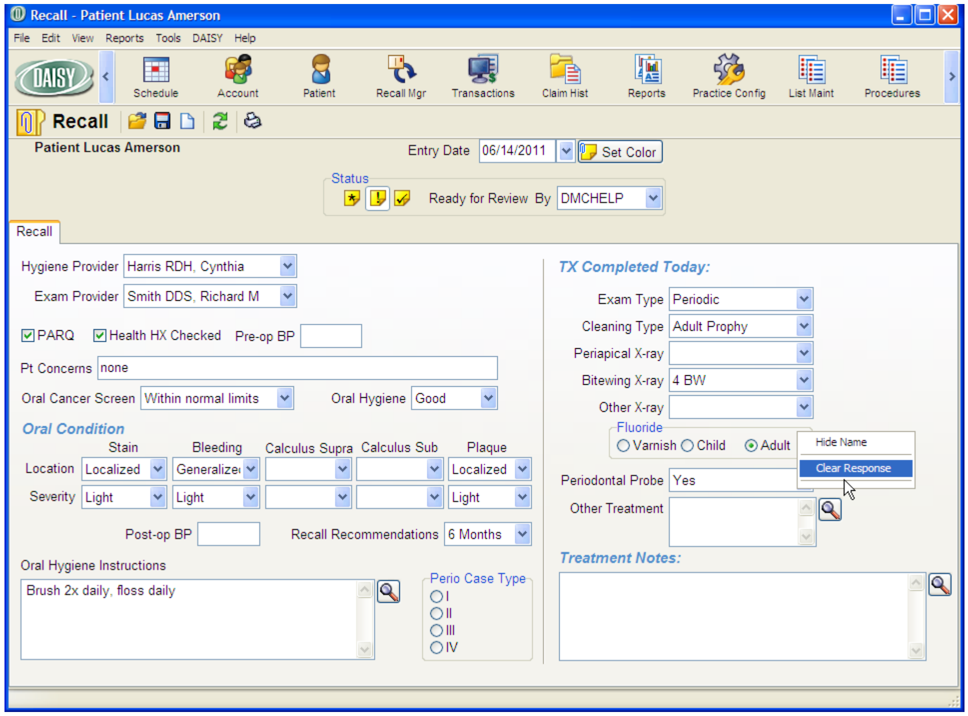
In the following example, Cynthia Harris is filling out a recall form for the patient Lucas Amerson. She incorrectly selected an option in the Periapical X-ray field and needs to clear it. She also needs to clear the selection under Fluoride.

◆ **To clear a response from a Details template:**

1. **From the DAISY toolbar, click .**
2. **Search for and select the patient.**
3. **Click the Add Note button.**
4. **In the Search For – Patient Details window, search for and select the appropriate template.**
5. **Enter clinical information in the template.**
6. **Do one of the following:**
   - To clear a response in a drop-down list, right-click on the drop-down list and select Clear Response.



- To clear a response from a radio button group, right-click in the group and select Clear Response.




7 **Make any additional changes, then click and close the window.**

**Note.** To clear a response in a clinical details form, right-click on the drop-down list or in the radio button group and select Clear Response.

# Generate a Referring Provider Envelope

A new Mail Merge template enables you to create a #10 business envelope addressed to a referring provider.

◆ **To generate an envelope for a referring provider:**

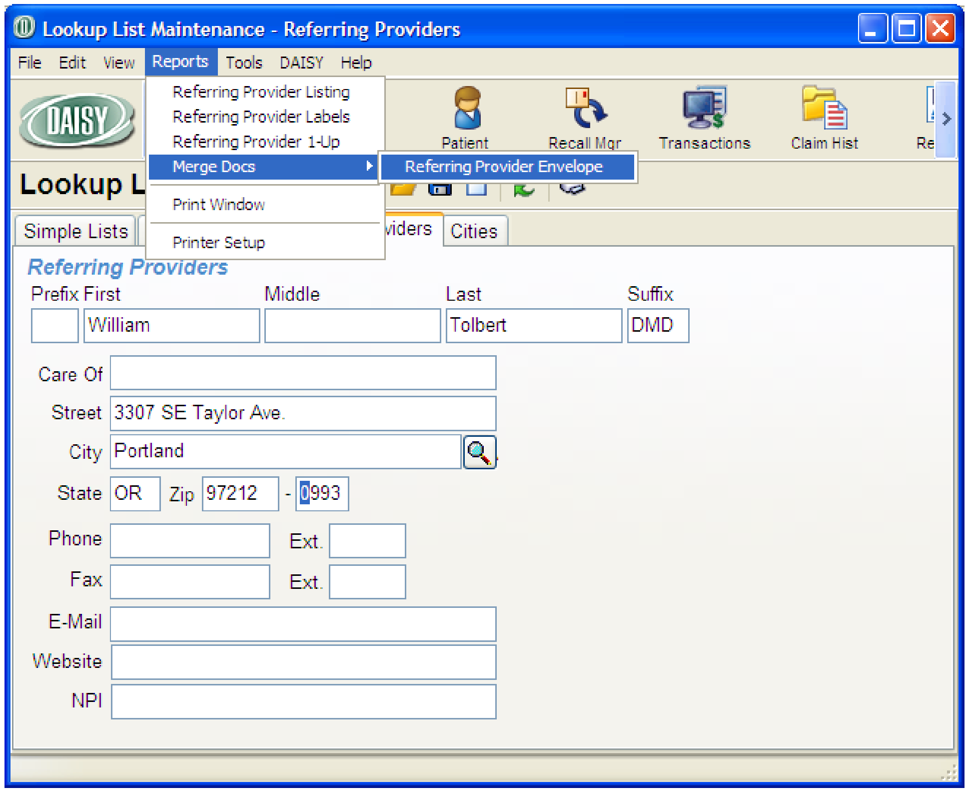
1 **From the DAISY menu, select Configure, then select List Maintenance.**

2 **Click the Referring Providers tab.**

3 **Do one of the following:**

- To select a referring provider, click to open the Search For – Referring Provider window, and select the provider.
- To add a new referring provider, click and type the name and address of the referring provider, then click .

4 **From the Reports menu, select Merge Docs, then select Referring Provider Envelope.**




5 **In the Print Options window, do one of the following:**

- Click Preview to preview the envelope in Microsoft Word.
- Click Print to print the envelope.

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