# **RELEASE NOTES**

# DAISY 4.2

#### **NEW FEATURES**

- ✓ Electronic prescribing with eRx
- Integrated credit card processing with DAISY InCharge





# DAISY 4.2 Update Release Notes

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# CHAPTER 1 What's New in DAISY 4.2

# **New Features**

#### **Electronic Prescriptions**

DAISY eRx enables dental offices to send electronic prescriptions through Clinician, a service managed by Emdeon. This new feature makes it easier to track a patient's current medications and prescriptions, offers improved prescription security and auditing, and performs real-time eligibility checking that is fully compliant with HIPAA 5010.

For more information, see "Electronic Prescribing" on page 9.

If you are interested in subscribing to this service, contact DAISY Sales at 503.765.3471 (select option 1) or <u>daisysales@dmcdental.com</u>.

#### **DAISY InCharge**

DAISY InCharge integrates credit card and automatic clearing house (ACH) processing (also known as electronic check transactions) between DAISY 4.2 and TransFirst, a leading provider of payment processing services. With DAISY InCharge, dental offices no longer need to manage and balance two separate electronic transaction systems: using a credit card terminal and using DAISY to enter payments. In addition, dental offices can set up automatic recurring electronic payments as part of a financial arrangement on a patient account.

For more information, see "DAISY InCharge" on page 39.

If you are interested in enrolling in this service, contact the TransFirst DAISY InCharge team at <u>dmcdental@transfirst.com</u>.

#### **Password Reset**

DAISY administrators with Security Officer permissions can now reset user passwords to their original default password. For more information, see "Reset a user password" on page 67.



# **Other Enhancements and Fixes**

#### Accounts

• Accounts can now have financial arrangements with automatic payments that process on a specified due date for a specified amount and for the term of the agreement or until the account reaches zero. For more information, see "Set up an auto-pay financial arrangement" on page 47.

#### Appointments

- Treatment plan procedures attached to an appointment now retain the performing provider assigned to the planned treatment. After treatment plan procedures are attached to an appointment, users can change the performing provider.
- The Status History section in the More tab in the Appointment window now provides more detailed information about AutoRemind confirmations. For more information, see "Appointment status history" on page 73.
- The Utilization section of the Appointment window now displays the appropriate number of resource utilization blocks when an appointment is created from an appointment template.
- The resource bar on the left side of the Schedule window now shows the correct number of resource allocations.

#### Backups

• To enhance security and improve data recovery, all archived files are now encrypted and backed up daily. These files are normally stored in C:\Program Files\DMC\Archive. Note that with this new feature, the initial backup can take 30 minutes or longer on a device such as a flash drive. The initial backup on a new flash drive may take longer. To ensure data integrity, do not restart or turn off the computer while the backup is running.

#### **DAISY Chat**

• DAISY Chat is now available from the Help menu (Help > Chat with a DAISY Representative).

#### **Insurance Coverage**

- To help ensure that electronic claims process reliably, the words "none" or "unknown" can no longer be entered in the Subscriber ID text box. The Subscriber ID must now contain:
  - At least two characters
  - Valid characters only: 0-9, a-z, A-Z, #, space, . (dot), and (dash)

The Subscriber ID (assigned by the insurance company) can be entered in the Insurance Coverage window or when adding insurance coverage from the Account window. The Subscriber ID can also be viewed in Patient and Account windows.

#### **Medical Alerts**

- A Premed check box has been added to the Medical Alerts tab in the Patient window. When this is checked, a Premed status icon ( ) displays:
  - In patient-related windows, such as Patient History and the Appointment window
  - On appointments in the Schedule window
  - In the Confirm Appointments window
  - In the DAISY Recall Manager window
- Premed has been added to Medical Alerts sections in the following reports:
  - Patient Profile (R1003)
  - Patient Medical Alerts (R1023)
  - Appointment Detail (R3004)
  - Patient Notes (R3013)
  - Appointment Route Slip (R3015)

#### Persons

• To maximize collections and ensure that electronic claims process reliably, mailing addresses can now be verified in DAISY using information from the U.S. Postal Service. For more information, see "Verify mailing addresses" on page 63.

#### Patients

- The Reports menu in the Patient window now displays the full description of a selected prescription rather than the prescription type. For more information, see "Reports menu" on page 78.
- In the Patient History window, double-clicking a note icon ( ]) in the Note column opens the archived document.



- The Patient History window now differentiates between medications and prescriptions.
  - Issued prescriptions have an entry type of RX.
  - Reported medications have an entry type of MEDS.

#### **Personal Info**

• In the Personal Info window, when DAISY saves email addresses, they no longer change to uppercase.

#### Prescriptions

- "PRN" can now be entered in the Refills text box in the Prescription window to indicate that a prescription can be filled as needed.
- The Prescription window now has a Days Supply text box for entering the number of days supply of medication.
- Prescription ID is now called Prescription Type in the following windows:
  - Prescription
  - Search For Prescription Type
- In the Lookup List Maintenance window:
  - The Prescriptions tab is now called Prescription Type. In this tab, the Prescription ID text box is now called Prescription Type.
- In the Prescriptions tab in the Patient window:
  - The Printed Comments text box has been removed.
  - The Prescription ID column has been renamed Rx Type.
- The Prescription window now has a new drop-down list called Issue Method.
  - After you select an issue method for a prescription and save it, the prescription cannot be modifed.
  - If your office does not subscribe to DAISY eRx or does not have eprescribing enabled, leave the Issue Method blank to automatically default to Print when you print a prescription. For more information, see "Prescription printing (without e-prescribing enabled)" on page 74.
- Patient prescription types can now be filtered by days supply. For more information, see "Prescription searches" on page 76.
- Patient prescriptions can now be filtered by prescription status and issue type. For more information, see "Prescription searches" on page 76.

- The DAISY Quick Access toolbar has the following new buttons: ( ) to access a patient's prescriptions and ( ) to access a patient's current medications. These buttons are available in the following windows:
  - Treatment Plan
  - Patient
  - Patient History
  - Appointment Notes Review
  - Appointment
  - Confirm Appointments
  - Follow Up Appointments
  - Perio Exam
  - Chart

#### **Practice Settings**

- User accounts are no longer managed from the Security tab in the Practice window. The Security tab has been moved to the new User window, which can be accessed from the DAISY menu (DAISY > Configure > Users). For more information see "Manage user accounts" on page 65.
- The Prompt for Printing Options check box has been removed from the System Defaults tab in the Practice window. Printing options can no longer be disabled.
- You can now set up a default disclaimer for financial arrangements. By default, this disclaimer displays on all of the practice's financial arrangements. For more information, see "Set up a default disclaimer for financial arrangements" on page 69.

#### **Procedures**

• 2011-2012 CDT Oral Surgery procedure codes have been updated.

#### Reports

- When viewing a report, the scroll wheel on the mouse no longer zooms in on the report.
- A filter for "Yesterday" has been added to reports, such as the Account Ledger report and Mail Merge documents, that include an "In the Period" option.
- The Tx Plan Proc. Not Done report (R2003), located in the Treatment Plans folder in the Report Gallery, now shows a patient's accepted treatment plan procedures, even when those procedures are attached to a canceled or pending appointment. For more information, see "Treatment plan reports" on page 68.



- On a treatment plan pre-authorization, if the total of the primary and secondary pre-authorization amounts is greater than the procedure fee, then the amount displayed for the provider discount on the following reports will now be zero rather than a negative number:
  - Treatment Plan-Standard (R2002)
  - Treatment Plan by Appt (R2002)
  - Tx Plan No Fees on Proc (R2002)
  - Appointment Route Slip (R3015) Insurance
- The Medication Status report (R3001) is now called the Current Medications report. This report now has lines for patient signature and signing date.
- The Appointment Route Slip (R3015) now includes current medications.
- The Appointment Detail report (R3004) now shows current medications.
- In the Patient window, changes have been made to the Reports menu:
  - The Monthly Medication selection has been removed.
  - The Daily Medication selection has been changed to Current Medications.
- The Patient Chart report (R2601) now includes reported medications (called MEDS). This report is available from the Reports menu in the Patient History window. For more information, see "Patient Chart report" on page 75.
- Reported medications are now filtered in the following reports:
  - Prescription History (R3003)
  - Prescription Form (R2300, R2301)
- The Patient Profile report (R1003):
  - Includes the patient's emergency contact name and phone number
  - Includes lines for the patient signature and signing date
  - Excludes inactive accounts associated with the patient
  - Includes the patient's current medications
  - Can now be printed from the Patient window using the Print icon ( lag )
- The Financial Arrangement Summary report (R2113) can now be filtered for payments made with or without auto-pay. For more information, see "Financial arrangement summary report" on page 69.
- The Statement Audit Report (R2215), which is available from the Reports menu in the Daisy Statement Manager window, no longer includes Medicaid and Collection accounts.
- The Security Log report has been added to the Reports menu in the new User window. This report tracks password changes and password resets.

- The Activity Log report (R1101) now shows:
  - Prescription activity that takes place in DAISY with or without eprescribing enabled. Logged activities can include added, issued, and deleted prescriptions.
  - The transfer of unposted payments including the account information and the transaction amount.

#### Transactions

- Any personal payment, including cash, check, credit card, and ACH payments, can be transferred to another account. The payment does not have to be reversed. Payments from an insurance company or other third party cannot be transferred.
- When the Transactions window is refreshed, the Accounts/Patients tree retains its sort order.



# CHAPTER 2 Electronic Prescribing

DAISY eRx enables dental offices to issue electronic prescriptions through Clinician, a service managed by Emdeon. This feature enables you to access patients' existing drug prescriptions covered by insurance and order new prescriptions electronically. DAISY eRx also offers improved prescription security and auditing, and real-time eligibility checking.

With DAISY eRx, you can:

- Write and send e-prescriptions directly to the patient's pharmacy.
- Track a patient's current medications and prescriptions.
- Determine which medications are covered by your patient's insurance before you write the prescription.
- Download a patient's prescription history (if available) from Clinician into DAISY.
- View a patient's allergies, existing prescriptions, and potential drug interactions, before you prescribe a particular drug.
- Ensure that only authorized providers can issue a prescription.
- Write a prescription anytime or anywhere from your mobile device (smart phone or tablet) using the DAISY Mobile service.
- Authorize refills electronically requested by the pharmacy.



# How DAISY eRx Works

The new DAISY e-Prescribing window gives you direct access to Clinician, where you can issue and manage e-prescriptions, instantly access drug formularies and drug information, and review and download patient medication history (if available) into DAISY.



When e-prescribing is enabled, patient prescription information moves from Clinician to DAISY securely and automatically.

You can connect directly from DAISY to specific windows in Clinician. For example:

- To create a prescription from the Prescriptions tab in the Patient window, click .
- To connect to the Patient Chart window in Clinician from the Patient window, click in the Quick Access toolbar.

To enable you to view and manage prescription information in Clinician, the Prescriptions tab in the Patient window has changed. Also, the Patient window has a new Medications tab.

### **Changes to the Prescriptions tab**

The Prescriptions tab in the Patient window displays the patient's current and past prescriptions. This tab has the following changes:

- The Printed Comments text box has been removed.
- The Prescription ID column is now called Rx Type. In the Rx Type column:
  - eRx indicates an e-prescription issued through Clinician.
  - Rx indicates a prescription issued directly in DAISY.

When you view prescriptions that originated in DAISY (Rx), they automatically open in the DAISY Prescription window. When you view prescriptions that originated in Clinician (eRx), they automatically open in the Rx History Details window in Clinician. For more information on the Rx History Details window, see "Manage prescription history" on page 25.

**Note.** If e-Prescribing is not enabled, then prescriptions with an Rx type of eRx open in the DAISY prescription window for viewing only.

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• The Dispense column shows the amount of medication dispensed, such as the number of pills or the amount of liquid.



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• The Status column shows the current status of an e-prescription.

This prescription status	Indicates that
Active	The patient is currently taking the prescription.
Authorized	The provider approved the prescription.
Discontinued	The patient discontinued taking the prescription during the course of treatment.
Lapsed	The days supply specified for the prescription has been reached, such as 30-days supply.
Pending	The prescription was placed on hold in Clinician.
Void	The prescription was voided prior to being filled by the pharmacy.

This issue method	Indicates
Electronic	The prescription was issued as an e- prescription and sent directly to the patient's pharmacy.
Electronic/Print	The prescription was issued as an e- prescription and printed in the dental office.
Hand Written	The prescription was written on a prescription pad and given to the patient.
Print	The prescription was printed in the dental office and given to the patient to take to the pharmacy.
Reported	Self-reported medication that the patient is currently taking.
Sample	A medication was given to the patient in the office.
Telephone	The provider phoned in or faxed a prescription to the pharmacy.

• The Issue Method column shows the method used to issue the prescription or that the prescription was reported by the patient.

• The Type column shows whether the prescription is new or a refill.



### About the Medications tab

The new Medications tab in the Patient window displays the patient's current medications. If e-prescribing is enabled, then current medications download into this tab automatically from Clinician.

If a days supply has been specified for the medication and the supply has lapsed, DAISY automatically removes the medication from this tab.

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### **Changes to Patient History**

The Patient History window now differentiates between medications and prescriptions.

- Issued prescriptions have an entry type of RX.
- Reported medications have an entry type of MEDS.

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# **Enable electronic prescribing in DAISY**

To use DAISY eRx, your practice must have:

- An Emdeon Clinician username and password for each provider and staff member
- A Site ID number from Emdeon

When you subscribe to DAISY eRx, a DAISY representative adds the Emdeon usernames and passwords and the Site ID number to your practice settings.



Before you can connect to Emdeon Clinician to manage patient e-prescriptions, you must enable e-prescribing for the practice.

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- To enable electronic prescribing for the practice:
  - 1. From the DAISY menu, select Configure, then select Practice.
  - 2. In the Practice window, click the EDI tab.
  - 3. In the e-Prescribing section, check the Enabled check box.
  - 4. Click 🔚 , then close the window.

**Note.** If you do not have the appropriate DAISY eRx access permissions, you see the Site ID text box and the Enabled check box grayed out. For more information on EDI access, see "Set up access permissions for DAISY eRx" on page 16.

# Set up access permissions for DAISY eRx

Only DAISY users with full access rights can change user account settings.

**Note.** Starting with DAISY 4.2, user accounts are managed from a new User window. For more information, see "Manage user accounts" on page 65.

- To set up user access permissions for DAISY eRx:
  - 1. From the DAISY menu, select Configure, then Users.
  - 2. Search for and select the user account, then click OK to open the User window.



3. Click the Security tab to view the user account settings.

4. To allow the user to manage e-prescriptions, check the Allow Managing Prescriptions check box.

Note. The user must first have the Allow Access to Patient setting enabled.

- 5. To allow the user to enable or disable DAISY eRx for the practice, change the EDI setting to Modify.
- 6. Click 🔚 , then close the window.

username and



# Connect to DAISY eRx

To get started, connect to DAISY eRx from the Patient window.

- To connect to DAISY eRx:
  - 1. From the DAISY toolbar, click 🗧 .
  - 2. Search for and select the patient, then click OK.
  - 3. In the Patient window, click the Prescriptions tab.

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You see the patient's prescriptions. This tab contains all of the prescriptions that have been issued to this patient, including current and past prescriptions.

Note. To view current prescriptions, click the Medications tab.

#### 4. In the Quick Access toolbar, click 💟 .

The e-Prescribing window opens. The first time you connect to DAISY eRx, you are required to install two e-prescription modules on each workstation.

From the Prescriptions tab, you can view all of the patient's prescriptions, including those created using DAISY eRx

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Do you want to install this software?
Name: <u>MeadCo's ScriptX</u>
Publisher: <u>Mead &amp; Company Limited</u>
Vore gptions
While files from the Internet can be useful, this file type can potentially harm your computer. Only install software from publishers you trust. <u>What's the risk?</u>
Connecting to e-Prescription services, please wait.

5. Click Install to install the first MeadCo's Scriptx software module.

You see an Advanced Printing installation dialog box.



6. Click Yes, Allow to enable e-prescription printing.

You see the eRx Patient Chart window.



# Add patient chart information

The first time you add an e-prescription for a patient, be sure the patient's phone number is in the Patient Chart in DAISY eRx. You might also want to add the pharmacy that the patient commonly uses.

Note. All of the patient's chart information updates automatically in the eRx Patient Chart when you update the Patient or Account window in DAISY.

- To add patient chart information:
  - 1. In the Home Ph. text box, type the patient's phone number.

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	Patient Ch	art for [Oli	ver Swift,54,Male,A	llergies: Has Al	ergies]			Print Sav	/e
	Patient Ord	ers Recurr	ing Rx Inbox	Identifiers	Drug Allergie	s Rx Histo	ory		
	Note: If any patient, ensure the order refl	guarantor, or in lects the most of	nsurance information current information.	n is changed, p	ease remembe	r to reprint any	unsent order	s. Reprinting will	
	Patient							Gua	rar
	•Bill Type:	Patient	·					Nam	ie
	•Last:	Swift		Suffix:	•			1 Gu	ara 🗏
	•First:	Oliver		MI:				Swift	1,01
	•DOB:	12/1/1957	Age: 54 YEA	ARS Gen	der: Male	-			
	•ID:	4010	S	SN: 123-45-67	89				
	•Address:	10505 SE 17t	h Ave.						
	Address 2:								
	•Zip/City/St.:	97222	Milwaukie		OR 🔻				
Type the patient's phone	Home Ph:	(503)225-6161	1			Cell:			
number here	Email:								
	Default Pharmacy:				P				
		[4325 82nd SE	E, Portland, (503)77	5-9603]					~
	<								>

2. Next to the Default Pharmacy text box, click *p* to open the Pharmacy Search window.

- **3.** In the Step 1 Search for a Pharmacy section, type the pharmacy information, then click Search.
- 4. In the Step 2 Select a Pharmacy section, choose the pharmacy, then click Select.

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	Step 1 - Search for a Pharmacy.									
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then click Search	• Pho	16:	I					- Soor	h Prost	, OI
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	Select	Pharma	<u>cy</u> <u>O</u>	rder Fax	Phone	Address		City	State	
	10	Walgreen Drug S	Store 03818	N N	(503)251-899	5 16200 N.E. GI	isan St.	Portla	nd OR	
		Walgreen Drug S	Store 03890	N N	(503)238-605	3 940 S.E. 39th	Ave.	Portial	nd OR	
	1 C	Walgreen Drug S	Store 04296	N N	(503)777-289	3 4420 SE Hold	ate Blvd	Portla	nd OR	
Choose the	0	Walgreen Drug S	Store 04353	N N	(503)775-960	3 4325 82nd SE		Portla	nd OR	
pharmacy here	C	Walgreen Drug S	Store 04495	N N	(503)295-648	) 2103 West Bu	irnside	Portla	nd OR	~
then click Select	<									>



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	Patient Chart for [Oliver Swift,54,Male,Allergies: Has Allergies]	int <u>S</u> ave
	Patient Orders Recurring Rx Inbox Identifiers Drug Allergies Rx History	
	Note: If any patient, guarantor, or insurance information is changed, please remember to reprint any unsent orders. Repri ensure the order reflects the most current information.	nting will
	Patient	Guarar
	Bill Type: Patient	Name
	●Last: Swift Suffix: 🔽	1 Guara
	First: Oliver MI:	Swiit, Of
	•DOB: 12/1/1957 🗞 Age: 54 YEARS •Gender: Male	
	•ID: 4010 SSN: 123-45-6789	
	Address: 10505 SE 17th Ave.	
	Address 2:	
	•Zip/City/St.: 97222 Milwaukie OR 🔽	
	•Home Ph: (503)225-6161 Cell:	-
	Email:	
The patient's	Default Pharmacy: Walgreen Drug Store 04353	
pharmacy is added	[4325 82nd SE, Portland, (503)775-9603]	*
here		>

The pharmacy is added to the patient chart.

5. Click Save to save the patient chart.

# Add patient drug allergies

Next, enter the patient's drug allergies and related allergens. This information automatically downloads into the Medical Alerts tab in the DAISY Patient window after you close the e-Prescribing window.

- To add drug allergies:
  - 1. In the eRx Patient Chart window, click the Drug Allergies tab.
  - 2. In the Allergies drop-down list, select Has Allergies.
  - 3. Click Add Allergen(s) to open the Allergy Search window.

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Allergie	s: Has A	Allergies	▼ Save							
Add	Allergen(	s)								
	Active	Descripti	ion		Onset	Туре	Adv	rse	Comment	
	Y	Egg/Poul	try		4/14/2012	2 All	ergen			
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- 4. In the Type drop-down list, select the type of allergen.
- 5. In the Description, type the allergen, then click Search.



6. In the Search results, check the appropriate allergens, then click Use Selected.

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	Step 1 - Search for a	n Allergy.						=
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Add Allergen(s						Sea	rch <u>R</u> eset	
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Γ Y	3 Allergy Meeting Search	h Criteria.						
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	tetracycline (bulk)							
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#### 7. Click Save.

The allergen is added to the patient chart.

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Allergies: Ha	s Allergies	Save	Back to Rx	Pad					Ξ
Add Allerg	en(s)	$\smile$							
Activ	e Descript	ion		Onset	Туре	Adv	erse	Comment	
Y	Egg/Pou	ltry		4/14/2012	Alle	ergen			
Г Ү	penicillin	V potassium		4/14/2012	D	rug			
Γ Y	tetracycl	ine		4/16/2012	D	rug			
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To delete an allergen, check the check box next to the item, then click Expire Selected

# Manage prescription history

With DAISY eRx, you can:

- Review the patient's prescription history before you issue a prescription.
- View current prescriptions issued by external providers and download them into the Medications tab in the Patient window in DAISY.
- Void, renew, or discontinue a prescription.
- View prescription details.

#### • To manage the patient's prescription history:

1. In the eRx Patient Chart window, click the Rx History tab.

You see all of the e-prescriptions issued to the patient by your office.

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Patient Chart for [Oliver Swift, 54, Male, Allergies: Has Allergies]												
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Reason to Discontinue:	1			Dis <u>c</u> ontir	nue							
Issued Authorized	ontinued Issue Method	Prescriber	Drug	SIG	Qty	Refills	Status	Days Left	Туре	Pharmacy	Address	
₩ 4/14/2012 7:21 PM	Electronic	Mayfield, William	Clindamycin 300 mg Cap	take 1 capsule (300 mg) by oral route every 6 hours	30	0	Active	4	New	ZZZ Training Pharmacy Nbr 1	2045 Midway Drive	
9/30/2009 9:00 PM	Reported	cardiologist	Adult Low Dose Aspirin 81 mg Tab, Delayed Release	take 1 tablet (81 mg) by oral route once daily			Active		Reported	ZZZ Training Pharmacy Nbr 1	2045 Midway Drive	×

#### 2. Click External Drug History to open the Patient Formulary History window.

You see all of the patient's current prescriptions issued by external providers.

**Note.** Not all insurance companies or employer group plans allow prescriptions issued by external providers to show in the patient chart.



- 3. To download these prescriptions into the Medications tab in the Patient window in DAISY, do one of the following:
  - To download all of the prescriptions, click Select All, then click Add Selected to History.
  - To add specific prescriptions, check the check box next to each prescription, then click Add Selected to History.

**Note.** For more information about the Medications tab, see "About the Medications tab" on page 14.

4. Click Close.

You see the Patient Chart window.

- 5. Do one of the following:
  - To void a prescription, check the check box to the left of the prescription, then click Void.
  - To renew a prescription, check the check box to the left of the prescription, then click Renew.
  - To Discontinue a prescription, such as when a patient has had an allergic reaction, check the check box to the left of the prescription. In the Reason to Discontinue text box, type the reason for discontinuing the medication, then click Discontinue.
  - To view a prescription's details, check the check box to the left of the prescription, then click Details.



The prescription details window shows you if the patient has allergies. You can also use the prescription details window to void, renew, or discontinue a prescription.



6. Click Cancel to return to the eRx Patient Chart window.



# Add reported medications

Next, enter any current medications that the patient reported. This information automatically downloads into the Medications tab in the DAISY Patient window after you close the e-Prescribing window.

- To add patient-reported medications:
  - 1. In the eRx Patient Chart window, click the Rx History tab.
  - 2. Click Reported Rx to open the Reported Rx window.
  - 3. Next to the Drug text box, click p to open the Drug Search window.

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Reported R Allergies]	x for [C	liver S	Swift,5	4,Male	,Allerg	ies: H	as <u>s</u> a	ve C <u>a</u> nce	2
•Drug: SIG:	Adult Low Do	ose Aspirin (81 mg) by	81 mg Tab oral route o	o, Delayed Re once daily	elease		٩	Drugs.con	1
Quantity:				Units of Meas	sure:		•		
Days Left:				Re	efills:	DAW			=
Days Supply:				Start E	Date: 10/10/	2011			
Comments:									
To:	Walgreen Dru	ug Store 04	4353[4325	82nd SE, Po	rtland]			-	ρ
Method:	Reported	tomonogor	mont						
Reported Prescriber (if different):		Ismanager							*

- 4. In the Description text box, type the name of the drug.
- 5. Click Select next to the drug the patient reported.
- 6. Enter other information about the medication, if available.
- 7. Click Save to close the window.

You see the eRx Patient Chart window.

# Add a prescription

After you add reported medications, if any, use the Rx Pad window to add a prescription.

- To add a prescription for a patient:
  - 1. Click New Rx.

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	Patient Chart for [Oliver Swift,54,Male,Allergies: Has Allergies]	^
	Patient Orders Recurring Rx Inbox Identifiers Drug Allergies Rx History	
	Start Date: Generate EMR Document	
prescription	View: Active Prescriptions  View: Reported R <u>x</u> External Drug <u>H</u> istory DUR Report	
	Void         Renew         Select All         Print List         Details         Customize Grid	Ξ
	Reason to Discontinue: Discontinue	
	lssued Discontinued Issue Prescriber Drug SIG Qty Refills Status Days Type Pharmacy Address Authorized	

You see the e-Prescribing Benefit Plans window.

- 2. Do one of the following:
  - Click Select next to the appropriate benefit plan to apply the insurance formulary to the prescription.
  - Click Use None to use no benefit plan.

In this example, no benefit plan information is available for Oliver Swift. The doctor clicks Use None.

• e-Prescribing								
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Benefit Plans								~
RxHub found no benefit p       Patient:     S       1       0       Available Plan(s)	olan informatio wift, Oliver (Male 0505 SE 17th A 00B: 12/1/1957	e <b>n. If the pa</b> e) ve. Milwauki	tient is eligi e, OR 97222	ble for Med	icaid, click Selec	t. If not, clic	k Use None.	
Patient Plan Name 1 Plans(s) Meeting Search	ch Criteria.	Me	mber ID 0	Group ID	Retail Pharmacy	/ Mail Ord	ler	
Oregon Health	Plan (Medicaid)				Y	N	Select Use None	
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You see the Rx Pad window for the patient.



3. In the Prescriber drop-down list, select the prescriber.

**Note.** You must select a prescriber before you can enter other prescription information.

- 4. Next to the Drug text box, click *p* to open the Drug Search window.
- 5. In the Description text box, type the name of the drug.
- 6. Click Select next to the drug you want to prescribe.

**Note.** DAISY eRx automatically issues a Drug Utilization Review (DUR) warning when appropriate. Click View to open the DUR Summary.

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•Drug:	Keflex 250 m	g Cap					- p		View Monograp
•SIG:	take 1 capsu Show Rx	le (250 mg) by Builder	v oral route ev	ery 6 hours					View Dosage <u>PDR.net</u> <u>Drugs.com</u>
	take 1 capsu	e (250 mg) by	oral route eve	ery 6 hours					
Quantity:	20		Units of	Measure:	122	▼ Wt:	lb 💌		
•Days Supply:	5			•Refills: 0	T DA	W			
Comments:								al	Click to add pati llergies to comm Add Allergy
	Max commer	t size is 210							
elssue To:	Walgreen Dr	ug Store 0435	3[4325 82nd 8	E, Portland]			* p		
Issue Via:	Electronic	T		• • • •	Do not save as Save as presci Save as facility	s preference riber preferenc / preference	e		

- 7. In the SIG drop-down list, select the appropriate directions.
- 8. Do one of the following:
  - In the Quantity text box, type the quantity of medication.
  - In the Days Supply text box, type the number of day's supply of medication.

**Note.** The days supply is automatically calculated based on the SIG and quantity, where appropriate. If the medication is a liquid, however, you must enter both the quantity of medication and the days supply.

9. In the Refills text box, type the number of refills for this prescription.

DAISY eRx automatically issues a Drug Utilization Review (DUR) warning when appropriate **10.** In the Issue To drop-down list, select the receiving pharmacy for this eprescription.

**Note.** The patient's default pharmacy displays automatically when you start a new prescription.

- Use this Issue Via option... When you... Electronic Send an e-prescription directly to the pharmacy. Electronic/Print Send an e-prescription directly to the pharmacy and print a copy for your records. Hand Written Issue a paper prescription in the office. This prevents DAISY eRx from sending the prescription to the pharmacy and documents that you wrote the prescription. Print Print the prescription in the dental office and give it to the patient to take to the pharmacy. Reported Record a medication that the patient reported. Sample Dispense the medication at the office. Telephone Phone in or fax a prescription to the pharmacy.
- 11. In the Issue Via drop-down list, select from the following options:

#### 12. Do one of the following:

- Click Issue to issue the prescription.
- Click Hold to put the prescription on hold.

#### 13. Do one of the following:

- If the medication has a contraindication or allergy alert, go to step 14.
- If the medication does not have a contraindication or allergy alert, go to step 15.



- 14. In the DUR Summary window, review the information, then do one of the following:
  - To issue the prescription, click Review & Return.
  - To change the medication, click Close to return to the RX Pad window.

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	The current	tly selected dru	g has generate	ed the followi	ng warnings fo	r this patient. A	fter taking the	se warnings ir	nto considerati	on, it may be	
	preterable	o chose a diffei	rent medication	1.							
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•											

You see a confirmation window.



#### 15. Close the e-Prescribing window.

**Note.** You cannot alter or delete an e-prescription after it is issued. You can, however, view the prescription's details. For more information, see "Manage prescription history" on page 25.

# Authorize a pending prescription

A prescription that has been placed on hold requires someone with the appropriate Clinician authorization permissions to issue the prescription.

**Note.** If you need to authorize prescriptions, or if you need your authorization permissions changed, contact your DAISY Security Officer.

When a prescription is placed on hold in Clinician, it displays with a status of Pending under the Prescriptions tab in the Patient window.

Patient - Oliver Swift									
<u>File Edit V</u> iew Reports	Documents	<u>T</u> ools DAIS <u>Y</u> <u>H</u> elp							
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Patient     Imactive     Phones     Ext.     Type     Photo     Imactive       Oliver Swift     (503)     121-4567     Cellular Phone     Cellular Phone       10505 SE 17th Ave.     Milwaukie, OR 97222     Photo     Imactive     Imactive								[	
Birthdate: 12/01/1957 Age: 54 Gender: M SSN: 123-45-6789 E-Mail: Accounts I Guarantor 1 Guarantor 2 Provider									
14424 Oliver Swift			Lorey DDS, Michelle P						
General Information Re	ferral Info	Insurance Coverage R	ecall Remind	lers/Tags	Nedical Alerts	Prescriptions	Medication	ns	
Rx Type	late	Medication	Dispense	Re	fills Provide	I SIG	Status	^	
eRx 0	4/22/2012	Peridex 0.12 % Mouthw	1	3	Mavfiel	d. V place 15 m	Pendina		
Rx 0	4/22/2012	Sudafed	21	0	Lorey [	DDS 3 times pe			
Rx 0	4/22/2012	Amoxicillin 500 mg	#8	0	Lorey [	DS Take 4 tab			
eRx 0	4/14/2012	Clindamycin 300 mg Ca	ar 30	0	Mayfiel	d, Vtake 1 cap	Lapsed		
Rx 1	0/10/2011	Amoxicillin 500 mg	#30	0	Lorey [	DS Take 1 tab			
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								~	
								>	
Added by: DMCHelp 03/2	Added by: DMCHelp 03/26/2012 01:09 PM Edited By: BETTY 04/16/2012 09:08 PM								

A prescription on hold in Clinician shows a status of Pending here

- To authorize a pending prescription:
  - 1. From the DAISY toolbar, click 🗧 .
  - 2. Search for and select the patient, then click OK.
  - 3. In the Patient window, click the Prescriptions tab.
  - 4. In the Prescriptions section, select the pending prescription.
  - 5. Click 📝 .


You see the Issue eRx dialog box.

Issue eRx	
Select the	user who can issue the prescription
Prescriber Password	BETTY 💌
	OK Cancel

- 6. In the Prescriber drop-down list, select the user who can issue the prescription.
- 7. In the Password text box, type the password for this DAISY user, then click OK.

You see the Patient Chart window in Clinician.

- 8. Click Rx Inbox to view pending prescriptions.
- 9. Check the check box next to the appropriate prescription.
- **10.** Click Authorize to issue the prescription.

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	Patient Chart for [Oliver Swift, 54, Male, Allergies: Has Allergies]											
	Patient Orders Recurring Rx Inbox Identifiers Drug Allergies Rx History											
	1 Rx(s) in list											
Click here to issue	Authorize Details Select All Print List Refresh Customize Grid											
the pending	Reasons for Denial:					▼ Deny						
prescription			4						~			
	lype Iran	smission Status	Received/Create	d Descripti	on Pharmacy	Prescriber	SIG	Qty	Refills			
	☑ New	Pending	4/22/2012 4:48 PI	Peridex 0. // % Mouthwas	12 Walgreen Drug Store h 04353	Mayfield, William	place 15 milliliters in the mouth by mucous membrane route 2 times per day (after meals), swish in mouth for 30 seconds then spit out	1	3			
	TIP! Sort multiple column	is simultaneously by	y holding down the	shift key and	clicking addition	al column heade	rs.					
									~			
	<								>			

## Create a list of drug and SIG preferences

Each time you issue a prescription, you have the option of adding the drug and the SIG to a list of preferences that you can use whenever you want to prescribe the same drug to one of your patients. You can create a preference list for the facility and one for each prescriber.

To select from the list of drug preferences, you click to the right of the Drug text box, then select the medication. Prescriber preferences appear in the top section of the list, and facility preferences show in the bottom section.

	e-Prescribing	
	<u>Elle Edit View Reports Iools DAISY</u> <u>H</u> elp	
	Schedule Account Patient Recail Mgr Transactions Claim Hist Reports Pre	actice List Maint Proced
	🚯 e-Prescribing 🖉 🖬 🗅 🎜 😂	
	Rx Pad for [Christine Zane,5/21/1953,59,Female,Allergies: <u>Has Allergies]</u>	Issue Hold
	Prescriber: Mayfield, William      Supervisor:	tory Reported Rx DUR Warnings
	Diagnosis:	View
	Keflex 250 mg Cap	View Monograph
Prescriber preferences —	SIG: Pentasa 500 mg Cap     Pentasa 500 mg Cap	PDR.net Drugs.com
appear above the line	•Quantity: Para Surak Warfarin 10 mg Tab	
	Capporter D:      Compositer D:	Click to add patient allergies to comments
Facility preferences —	Penicillin V Potassium 250 mg Tab	
appear below the line	Bredoisnnei 19.000 Jahrvin a Dose Pack	
	Issue To: ZZZ Training Pharmacy Nbr 1[2045 Midway Drive, Twinsburg]	
	Do not save as preference     Save as prescriber preference     Save as facility preference     Save as facility preference	
		>

To select from the list of SIG preferences, you click to the right of the SIG text box, then select the SIG. The top section shows SIGs that were attached to a drug in the list of drug preferences, and the bottom section shows standard SIGs for the selected drug.

- To add a drug and SIG to your list of preferences:
  - 1. From the DAISY toolbar, click 🗧 .
  - 2. Search for and select the patient, then click OK.
  - 3. In the Quick Access toolbar, click 门 to open the eRx Patient Chart window.
  - 4. In the eRx Patient Chart window, click the Rx History tab.
  - 5. Click New Rx.



- 6. Do one of the following:
  - Click Select next to the appropriate benefit plan to apply the insurance formulary to the prescription.
  - Click Use None to use no benefit plan.

You see the Rx Pad window for the patient.

7. Enter all of the information for the prescription.

**Note.** For more information about adding a prescription, see "Add a prescription" on page 29.

IIMSV DA <			-					200	1	
	Schedule	Account	Patient	Recall Mgr	Transactions	Claim Hist	Reports	Practice	List Maint	P
e Pres	scribing		23							
-										_
Rx Pa	d for [Oli	ver Swift,1	2/1/195	7,54,Male	,Allergies:	Has Allerg	ies		Issue Hold	
							<u>R</u> x H	listory	Reported Rx	
•Prescriber:		▼ DE	EA: 🔽 🤤	Supervisor:		•			DUR Warnings	
Diagnosis:							م •		2.6	
							- p		view	
•Drug:	Alt.								View Monograph	1
							-		View Dosage	
•SIG:	Show Rx	Builder							PDR.net Drugs.com	
		_								
Quantity:			Units of	Measure:		VVt:	lb 💌			
Days Supply:				•Refills:	DA	W				
								C alle	lick to add patie	nt
Comments:									Add Allergy	
	Max commen	t size is 210						Y		
Issue To:	ZZZ Training I	Pharmacy Nbr	1[2045 Midv	vay Drive, Twir	nsburg]		- p			
				6	Do not cave a	preference		-		
				3-	DU HULSave a	Character Chico				

Choose one of these options to add this drug and SIG to the preference lists

#### 8. Do one of the following:

- To add this drug and SIG to the preference list for the prescriber, choose Save as Prescriber Preference.
- To add this drug and SIG to the preference lists for the facility, choose Save as Facility Preference.
- 9. Complete the prescription.

The drug and SIG are added to the preference lists.

## View the status of e-prescriptions

The eRx Inbox provides information about the following:

- Prescriptions that the provider still needs to authorize
- Prescription renewals
- Prescriptions with errors that prevented the pharmacy from filling the order

DAISY automatically updates eRx status information every 10 minutes.

**Note.** To access the eRx Inbox, you must be assigned the "Allow managing prescriptions?" permission. For more information, see "Set up access permissions for DAISY eRx" on page 16.

• To view the eRx Inbox for the practice:

#### 1. From the DAISY Central window, do one of the following:

- Click the Check eRx Inbox link.
  - From the Daisy menu, select eRx Inbox.

DAISY Central												
File Edit View Reports D	AISY	Help										
CASY C Schedu	Acc App	ount oointment	*	Recall	Mgr Tra	ansactions	Clair	m Hist	Reports	Practic	e Lis	t Maint >
DAISY Central	Cha Pati	ent	•				Che	eck eRx	Inbox	<u>New ele</u>	ectronic re	e <u>mits</u>
Recent Items 📝	Insu	urance		ents for	All Resou	irces		~	• •			×
🗉 📑 Appointments	Con	figure	•		T	vpe	Descri	ption			Minutes	Status
🗊 🔝 Schedules	Clos	sing	•			21						
Patients	📓 Rep	orts										
Oliver Twist	B Doc	ument Mgr										
John Zane (	DAI	SY Central										
Lucas Amerson	) eRx	Inbox	<b>S</b>									
Christine Able	D 3D 1	Imaging	Ъ,									
Shannon Abbott	a car	Reuro DATEV T	aallaar									
John Vineyard	Con	ingure DAIST I	oolbar									
Gloria Chavaz	Cha	inge Osei										
Brian Taft	S CIID	inge Fassword										
	Lod	k DAISY										
🕀 👹 Accounts 🔮	🗾 Exit											
🕀 🛄 Ledgers		Name				1	Size	Туре		Date	Modified	
E Claims												
Insurance Coverag     Charts	es											-
Patient History												
,		Aging Su	immary									×
		Provider	Current	_ast Billed	Over 3	0 Over	60 C	Over 90	Over 120	Balance		~
		Smith DDS	\$13,590.57	\$58,678.23	64,176.4	2 \$25,278	.36 \$	603.02	\$435.291	62,761.89		
		Total	13,590.57	\$58,678.23	\$64,176.4	2 525,278	.36 \$	603.02	\$435.291	62,761.89		
												-
	>	d in since of	4/44/40 00	01.11			_	_				×
User: BETTY	Logge	ed in since 0	4/14/12 02	:04:44 pm								

**Note.** You can also add an eRx Inbox button ([c]) to the DAISY toolbar. If the eRx Inbox has at least one pending item, the icon is red; otherwise it is green.

If the eRx Inbox has at least one pending item, this link is red; otherwise it is green



2. In the Access eRx Inbox, type your DAISY password.

Access eRx	: Inbox
Select the u	user who is accessing the eRx Inbox
Prescriber Password	BETTY 💌
	OK Cancel

You see the e-Prescribing window with today's prescription status.

Note. If you are using Internet Explorer 9, you must click the Download /Update Scriptx Here link to enable you to print prescriptions from your computer.

		111			ſ	
Eile Edit View Reports Tools DATSY Help					Ŀ	JU
		<b>F</b>	Inc.	52		
Schedule Account Patient Recall Mg	yr Transactions	Claim Hist	Reports	Practice	List Maint	Pre
限 e Prescribing 📓 🖬 🗅 🎜 😂						
Home Orders • Reports • Rx • Patient • Admin	<ul> <li>Config/Setup</li> </ul>	▼ Logout				
Recent:		_				
Today's Status at Dentists Managen	nent Corp	Downlo	ad/update Scr	iptX here for IE	9 compatibili	ty.
						_
Order Status	2					
Standard Orders Entered Today	<u>U</u>					
Orders Transmitted Today	0					
Reports Status						
Reports Not Yet Viewed Or Printed (last 7 days)	<u>0</u>					
Abnormal Reports Not Yet Viewed Or Printed (last 7 days)	<u>0</u>					
Rx Status						
New Rx(s)	1					
Renewal Rx(s)	<u>0</u>					
Print Pending Rx(s)	<u>0</u>					
Errored Rx(s)	<u>0</u>					
Our Sponsors						
Quest		SI ahCo	rn			
Diagnostics		Laboratory Corporation of Arms				
						J) 🔤

# CHAPTER 3 DAISY InCharge

DAISY InCharge integrates credit card and automatic clearing house (ACH) processing (also known as electronic check transactions) between DAISY 4.2 and TransFirst, a leading provider of payment processing services. With DAISY InCharge, dental offices no longer need to manage and balance two separate electronic transaction systems: using a credit card terminal and using DAISY to enter payments.

This new DAISY feature:

- Automatically creates a payment transaction, helping you manage account receivables and reducing payment processing time
- Minimizes transaction errors caused by duplicate entry
- Prevents patient and staff fraud since all transactions are directly connected to the patient's account
- Eliminates maintenance costs and phone lines associated with a separate credit card terminal
- Fully complies with Payment Card Industry (PCI) and HIPAA regulations
- Supports automatic recurring electronic payments as part of a financial arrangement on a patient account

However, settlement batch reports as well as ACH returns and voiding transactions are handled on the TransFirst side via their Virtual Terminal web interface.

Credit card transactions automatically settle at midnight. ACH transactions automatically settle at midday.

**Note.** DAISY does not store user credit card or bank account information. Only the last four digits of the credit card or bank account number are stored in DAISY.



# Set up DAISY InCharge

Before you can use DAISY InCharge, you need to configure your practice to process electronic transactions as follows:

- Specify the credit cards that the practice accepts according to your contract with TransFirst. These card types will display on account statements.
- Set up the TransFirst connection in DAISY for each office location.

Note. A DAISY representative will help you set up this connection.

### Set up accepted credit card types for the practice

To use DAISY InCharge, you need to specify all of the credit card types that the practice accepts according to your contract with TransFirst. These credit card types will display on account statements.

- To set up the credit card types accepted by the practice:
  - 1. From the DAISY menu, select Configure, then Practice.
  - 2. In the Practice window, click the Financial Setup tab.
  - 3. In the Accepted Credit Cards on Statement section, check the check box for each credit card type that the practice accepts.

	Practice - 9999							
	<u>Eile E</u> dit <u>V</u> iew Reports Do	ocuments <u>T</u> ools [	DAIS <u>Y</u> <u>H</u> elp					
	CASE Chedule	Account	Patient	Recall Mgr	Transactions	Claim Hist	Reports	Practie >
	Geractice		8					
	Practice Settings							
	DAISY Office ID 9999							1
	Practice Financial Setup	System Defau	Its Collection	n Messages	Other Messages	Location	AutoRemind	EDI 👢
	Financial Setup		Sta	tement Op	tions			
	Finance Charges			Pay	ment Grace Perio	d 60	✓ days	
	Interest ORe	ebill Fee	Ac	count Balanc	e Write-Off Amoun	t \$2	.00	
	Annual Interest Percer	nt 18		Default	Payment Due Day	4	20	
	Minimum Einance Chara	e \$0.50	High	nlight Printed	Statement Messa	ges?		
	Winning Thance Charg	00.00	Prin	t Estimated F	Portions Due on St	atements?		
	Rebill Fee Amour	nt \$0.00	-A	ccepted Cred	it Cards on Staten	nent		
	Min. Balance to Incur Fee	s \$0.00		Discover	o Visa	n Express		
				Other				
Select each credit card								
type that I ransFirst will								
process								
	Financial Arrangeme	nt Default Dis	claimer					
	I understand that I am fina	incially responsil	ble for any and	d all unpaid a	mounts incurred in	treatment	I also underst	and that 🛆
	if my account remains un	paid and is forwa	irded to a colle	ection agency	/, I will be respons	ble for any	reasonable co	llection
	costs, including redsollab	ie attorney iees.						
								~
								.::

4. In the Other text box, type the name of one or more additional credit cards that the practice accepts, if any.

Use a space to separate the credit card names. You can type up to 25 characters, including spaces.

5. Click 🔚 to save the settings.

### Set up each office connection to TransFirst

Next, you need to set up a connection to TransFirst for each office location. Each location has its own TransFirst merchant ID and registration key.

**Note.** Please wait for a DAISY representative to help you set up this connection.

- 1. In the Practice window, click the Location tab.
- 2. In the Office Locations section, select a location.
- 3. In the DAISY InCharge section, do the following:
  - a Check the Enable Card Services check box.
  - **b** In the Merchant ID text box, type the TransFirst merchant ID for your practice.
  - c In the Registration Key text box, type the TransFirst registration number.
- 4. Repeat steps 2 through 3 for each additional office location.
- 5. Click 🔚 and close the window.

- To set up a credit card payment profile:
  - 1. From the DAISY toolbar, click 🦃 .
  - 2. Search for and select the account, then click OK.
  - 3. In the Account window, click the Payment Profiles tab.
  - 4. Click 🛖 .

#### DAISY 4.2 Update Release Notes

Set up access to TransFirst Virtual Terminal

You can access TransFirst Virtual Terminal directly from within DAISY. You use the Virtual Terminal to view settlement reports and other financial reports, including:

- Transaction summary and detail reports
- Settlement summary and detail reports
- Return lists
- Recurring payments detail and problem summaries
- ACH statements

For more information, see the TransFirst Virtual Terminal documentation.

- ◆ To access Virtual Terminal:
  - 1. From the DAISY menu, select Account, then TransFirst.
  - 2. In the Merchant ID textbox, type your TransFirst merchant ID.
  - 3. In the Password textbox, type your TransFirst password.

**Note.** For easier access, add the TransFirst button (

### Set up a payment profile

To process electronic transactions for an account, especially for recurring payments, you can save payment information, such as credit card or checking account numbers, in a payment profile. Each account can have one or more payment profiles. These profiles are Payment Card Industry (PCI) compliant.

**Note.** Users must have the "Allow access to Transactions" permission to set up, modify, and delete payment profiles.



5. In the Add a Payment Profile dialog window, click Credit Card.



#### 6. Do one of the following:

- Swipe the credit card through the credit card reader to feed in the credit card information, then go to step 12.
- If you are entering all card information manually, go to step 10.

Credit Card Payme	nt Profile
Swipe card or man	ually enter the card information.
Account # 1	1323 - Mora, Malcolm
Card Number	5428443005360073
Expiration Date	07 🕶 / 20 💌 MM / YY
Card Holder Name	Malcolm Mora
Zip Code	97230
Location	
Location	
	Submit Cancel

- 7. In the Card Number text box, type the credit card number.
- 8. In the Expiration Date drop-down list, select the month and year.
- 9. In the Card Holder Name text box, type the card holder name, if available.
- 10. In the Zip Code text box, type the billing address zip code for this credit card.

**Note.** DAISY automatically fills in this text box with the guarantor's primary zip code.

11. From the Location drop-down list, select the office where the payment is being made.



#### 12. Click Submit to save the profile.

- If the credit card is approved, you see the DAISY A/R dialog box with the word "Approved."
- If the credit card is denied, you see the DAISY A/R dialog box with the word "Denied."

#### 13. Click OK to close the window.

You see the new credit card payment profile.

	O Account - 11323	
	<u>Eile E</u> dit <u>V</u> iew Reports Documents <u>T</u> ools DAIS <u>Y</u> <u>H</u> elp	
	Schedule Account Patient Recall Mgr Transactions Claim Hist	Reports
	🥵 Account   🖆 🗔 🗅   🎘   🍪   🛒 💱 🛤 🏶 🗞 🗞   🐯   🐺 💭 🗑	
	Guarantor 1       Inactive       Phones       Ext.       Type         Malcolm Mora       (503) 796-6734       Home         234 NE Pacific       (503) 772-2477       Mr       Work	Į
View the last time that		
this profile was used for	E-Mail:	
a transaction and the	Insurance Coverage 🔮 🕜 😑	
status of that	Ins Co ID Insurance Company Insurance Plan Name Subscriber Subscriber ID	Group #
transaction here	6200 AMERITAS Graphic Art Center Plan Malcolm Mora 541868736	10-383822-2
		>
In a payment profile	Financial Info General Patients Financial Arrangement Statements Reminders Payment Pi	rofiles
you can edit only the	Payment Profiles 🖕 🔤	
Description column	Description Member Name Type Prior Trans. Date Prior Trans.	St Merchant Loc
	Mastercard:**0073 Exp:07/Malcolm Mora	Dental Office
Indicates that this is a		
profile		
	Added by: Administra 04/01/1989 12:00 AMI Edited By: BETTY 07/15/2012 09:57 PM	

### Set up an ACH payment profile

- To set up an ACH payment profile:
  - 1. From the DAISY toolbar, click 🥰 .
  - 2. Search for and select the account, then click OK.
  - 3. In the Account window, click the Payment Profiles tab.
  - 4. Click 🛟 .

5. In the Add a Payment Profile dialog window, click ACH.



6. In the Routing # text box, type the bank routing number.

ACH Payment Pro	file
Enter the check i	nformation.
Account #	13716 - Land, Mylan
Routing #	121212120 Check Type Account Type Ochecking
Bank Account #	34325467562 OBusiness OSavings
Check Signer	Mylan Land
Memo	
Location	Dental Office
	Submit Cancel

- 7. In the Bank Account # text box, type the bank account number.
- 8. In the Check Type section, choose the type of check to process.
- 9. In the Account Type section, choose the type of bank account.
- 10. In the Check Signer text box, type the name of the person who authorized the payment.

For example, the authorizer could be the patient or the person whose name is on the bank account. You can type up to 25 characters, including spaces.

11. In the Memo text box, type a memo about this profile, if needed.

The memo displays in the Comment column for this payment in the Ledger window.

12. From the Location drop-down list, select the office where the payment is being made.



#### 13. Click Submit to save the profile.

- If the routing number and bank account number are approved, you see the DAISY A/R dialog box with the word "Approved."
- If the routing number or bank account number are denied, you see the DAISY A/R dialog box with the word "Denied."

#### 14. Click OK to close the window.

You see the new ACH payment profile.

	Account - 13716					
	<u>File E</u> dit <u>V</u> iew Reports Docu	uments <u>T</u> ools DAIS <u>Y</u> <u>H</u> e	lp			
	CASE Contraction C	Account Patier	nt Recall Mgr	Transactions	Claim Hist	Reports
	🥳 Account 🧉	28	i 🔒 🖩 🖗 🔇	A 🗞 🐺	r 🗑 🗑	
	Guarantor 1 Mylan Land 393 NE Lewisville Hwy Battleground, WA 98604	Inactive PI	hones 🥵 Ex 60) 186-6661	t <b>. Type</b> Home		Į
To delete a profile, select the profile, then click here	E-Mail: Insurance Coverage					
	Ins Co ID Insurance Compa	any Insurance Pla	n Name Subscri	ber Su	bscriber ID	Group #
	Ciminancial Info. General Pa	ients Financial Arrang	rement Statemen	nts Reminders	Pavment P	rofiles
In a payment profile,	Promont Profiles		gennenn - otaternen	ita iterindere		
this column is the only	Payment Promes		I= I= :	1		
one that can be edited	Description	Member Name	Type Prior	Trans. Date	Prior Trans. 3	St Merchant Loc
	Savings:**4412	Mylan K Land	ACH			Dental Office
	Checking: 7562	Iviyian Land	ACH			Dental Office
Indiantee that this is an						
ACH novment prefile						
ACH payment profile						
	<					<u> </u>
	Added by: Administra 08/12/	2002 12:00 AM Edited	By: DMCHelp 06/2	29/2012 07·01 P	M	
	Added by: Administra 08/12/	2002 12:00 AM Edited	By: DMCHelp 06/3	29/2012 07·01 D	M	
	Added by: Administra 08/12/2	2002 12:00 AM Edited	By: DMCHelp 06/2	29/2012 07:01 PI	M	

### Delete a payment profile

When you delete a payment profile in the Account window, DAISY also inactivates the profile information on TransFirst.

- To delete a payment profile:
  - 1. From the DAISY toolbar, click 🥵 .
  - 2. Search for and select the account, then click OK.
  - 3. In the Account window, click the Payment Profiles tab.
  - 4. Select the payment profile you want to delete.

- 5. Click 👝 .
- 6. Click OK to close the DAISY A/R dialog window.

# Set up an auto-pay financial arrangement

You can use a payment profile to set up automatic recurring payments as part of a financial arrangement on a patient account.

- To set up a financial arrangement with automatic recurring payments:
  - 1. From the DAISY toolbar, click 🦃 .
  - 2. Search for and select the account, then click OK.
  - 3. In the Account window, click the Financial Arrangement tab.
  - 4. Click New to create a new financial arrangement.

Note. This also removes the previous financial arrangement.

5. In the Auto-Pay Profile drop-down list, select the payment profile to use for auto-pay.

<b>V Account - 12513</b> ile Edit View Reports Documents Tools D.	AISY Help
Schedule Account	Patient Recall Mgr Transactions Claim Hist R
🥳 Account   🐸 🖬 🗅   🎜	😂   🗊 🖬 🖩 🗞 🕄 🖧 🗒   🖬 🗊 🗑
Guarantor 1 📝 🗌 Inactive	Phones 🛃 Ext. Type
Kelley Kane	(503) 322-6110 Home
Portland, OR 97220	(503) 002-5390 286 Work
E-Mail:	
nsurance Coverage 🛛 🙀 🗖 🖃	
Ins Co ID Insurance Company Insura	nce Plan Name Subscriber Subscriber ID Group
9278 GREAT WEST HEALTH Harry's	s Fresh Foods Pla Kelley Kane 544968053 16631
Financial Info General Patients Financia	al Arrangement Statements Reminders Payment Profiles
Financial Arrangement Auto-Pay Prof	ile Kelley's FSA's Mastercard:**3638 Exp:05/19 billed from D
Enter the amount owed \$300.25	Disclaimer 🔍 🖉 Automatically remove if balance goe
Enter the down payment \$50.00	I understand that I am financially responsible for any and
Select how to calculate the payment	unpaid amounts incurred in treatment. I also understand t my account remains unpaid and is forwarded to a collecti
Number of payments	agency will be responsible for any reasonable collection
Monthly payment \$83.83	costs, including reasonable attorney tees.
First Payment Due Date 08/20/2012	Summary
	Amount financed is: \$250.25
Payment Due Day 20 🟹	Total Of All Payments: \$251.50
/	Total FC/Rebill Fee: \$1.25
	OppugLiptorget Liste: 19%

Check this check box to clear the financial arrangement when the account balance reaches zero



## 6. To clear the financial arrangement when the account balance reaches zero, check the Automatically Remove If Balance Goes to Zero check box.

Clearing the arrangement prevents DAISY from withdrawing funds once the account balance reaches zero. DAISY clears the arrangement during autopay processing.

Note. You only see the check box if you select a payment profile.

- 7. To add to the default disclaimer for this financial arrangement, do one of the following:
  - Next to the Disclaimer text box, click , then select a canned disclaimer, and click OK.
  - In the Disclaimer text box, type a new disclaimer.

**Note.** By default, DAISY uses the disclaimer from the Financial Setup tab in the Practice window.

8. In the Enter the Amount Owed text box, type in the total amount owed.

This is the gross amount before deducting the down payment.

- 9. In the Enter the Down Payment text box, type in the down payment, if any.
- 10. In the First Payment Due Date and Payment Due Day text boxes (if you don't want to use the default dates), type in changes.
- 11. Under Select How to Calculate the Payment, do one of the following:
  - To calculate the payment by the number of payments a patient wants to make, choose Number of Payments. In the text box, type in a number of monthly payments. Click Calculate, then click Yes to save the arrangement.
  - To calculate a payment by the amount the patient wants to pay monthly, choose Monthly Payment. Type in the monthly payment amount. Click Calculate, then click Yes to save the arrangement.

In the Summary section, you see that the amount financed is calculated for you; it equals the Amount Owed minus the Down Payment. If you are assessing interest, you also see the default interest rate or rebill fee displayed in the Summary section.

**Note.** DAISY calculates the final payment amount when you click Calculate.

## **Process a credit card payment**

You can process a credit card payment from the following DAISY windows:

- Transactions
- Ledger
- Quick Estimate

You enter the payment either by swiping the credit card through a credit card reader connected to your computer, by typing in the credit card information, or by selecting a payment profile.

**Note.** For more information about payment profiles, see "Set up a payment profile" on page 42.

- To process a credit card payment:
  - 1. From the DAISY toolbar, click 🜉 .
  - 2. In the Transactions window, click By Account.
  - 3. Click the Payments tab.
  - 4. Do one of the following:
    - If the account is listed in the Accounts/Patients tree on the left-side of the window, click the account name.
    - If the account is not listed, right-click in the Accounts/Patients section and select Select an Account. Search for the account, then double-click the account name.
  - 5. Do one of the following:
    - From the Tools menu, select Credit Card Payment.
    - Swipe the credit card through the credit card reader to feed in the credit card information.

You see the Credit Card Payment dialog window.

Credit Card Payme	nt
Swipe card, use an	existing payment profile, or manually enter the card information.
Account # 1	0382 - Spring, Rachel
Payment profile	None
Card Number	5428443005360073
Expiration Date	07 V 20 MM / YY
Card Holder Name	Rachel Spring
Zip Code	
Amount	0.00
CVV2	
Location	Dental Office
	Submit



- 6. Do one of the following:
  - If you are entering all card information manually, go to step 7.
  - If you swiped the card, you see the card number, expiration date, and card holder name filled in. Go to step 10.
  - If you are using a payment profile for this account, select the profile in the Payment Profile drop-down list, type the payment amount in the Amount text box, then go to step 14.

**Note.** For more information about payment profiles, see "Set up a credit card payment profile" on page 42.

- 7. In the Card Number text box, type the credit card number.
- 8. In the Expiration Date drop-down list, select the month and year.
- 9. In the Card Holder Name text box, type the card holder name, if available.
- 10. In the Zip Code text box, type the billing address zip code for this credit card, if available.
- 11. In the Amount textbox, type the payment amount.
- 12. In the CVV2 text box, type last three digits on the signature panel on the back of the credit card, if available.
- 13. From the Location drop-down list, select the office where the payment is being made.

Note. DAISY defaults to this location the next time you make a payment.

- 14. Click Submit.
  - If the payment is approved, you see the DAISY A/R dialog box with the word "Approved."
  - If the payment is denied, you see the DAISY A/R dialog box with the word "Denied."

**Note.** For security reasons, you cannot post the same dollar amount on the same day from the same card.

15. Click OK to close the window.



In the Transactions window, you see the unposted payment in the Payments tab.

If you used a payment profile to make the payment, you also see "CC On File" in the Comment column.



## Print a credit card receipt

After you complete the credit card transaction, you can print a Visit Summary report that now includes a responsibility statement and signature line. This report can be used as a credit card receipt.

				Centerpoint 2039 N Portland (503)	enterpointe Dental Center 2039 NE 128th Ave Portland, OR 97220- (503) 483-6383			23456
	Activity for Guarantor Rachel S 78 NE 1 Portland Home pl Work pl	Account #10382 Spring 25th Place , OR 97230 hone (503) 5 hone (503) 9	82-5789 12-5522		•			
	Date	Patient	Code Description	1				Amount
	Payments 05/11/2010 07/10/2012	On Account On Account	Payment Check≓324 Payment Mastercard	÷				85.00 cr 1.03 cr
Visit summary reports now —	I agree to pa	ay \$1.03 according	to the card issuer agre	ement.				
have a credit card	Signature:	Comment	Test Dilled	On an 20	0		Or 120	Palaura
statement of responsibility	Account	\$211.00	S0.00	\$124.97	\$0.00	S0.00	\$0.00	\$335.97
and signature line	Last Paym Last Insuras Last Person Copyright 2012	ents nce Payment 01/ al Payment 07/ DAISY Version 4.2	(29/2009 \$265.0) (10/2012 \$1.0 Printed: 07/10/2012 08	) 3 Thank you ! :39PM	Report: 2142			Page l

- To print a credit card receipt:
  - 1. Open the Transactions window.
  - 2. Search for and select the account, then click OK.
  - 3. From the Reports menu, do one of the following:
    - Select Visit Summary.
    - Select Visit Summary with Patient Responsibility.
  - 4. Do one of the following:
    - To preview the report first, click Preview, then click 😂 to print it.
    - To print the report without previewing it, click Print.

### Void a credit card payment

You can void only credit card payments that are not settled and only for the full amount of the original payment.

You can void transactions from the Transactions and Ledger windows.

Note. TransFirst settles credit card transactions each day at midnight.

- To void a credit card payment from the Transactions window:
  - 1. Open the Transactions window.
  - 2. Search for and select the account, then click OK.
  - 3. Click the Payments tab.
  - 4. Right-click the credit card payment and select Remove.

Daisy removes the payment from the Transactions window.

**Note.** If TransFirst has settled the credit card payment, the right-click menu will not show a Remove option; you can only refund the amount. To refund a credit card payment, see "Refund a credit card payment" on page 53.

### Refund a credit card payment

After TransFirst settles a credit card payment, you can no longer void the payment. However, you can issue a refund for:

- Unposted credit card payments from the Transactions window
- Posted credit card payments from the Ledger window

Credit card refunds are issued to the cardholder who made the original payment.

**Note.** TransFirst settles credit card transactions each day at midnight. To void an unsettled credit card payment, see "Void a credit card payment" on page 53.

- To refund a credit card payment:
  - 1. From the DAISY toolbar, click 📃 to open the Ledger window.
  - 2. Search for and select the account, then click OK.



3. Right-click the credit card payment and select Refund to Credit Card.



You see the Credit Card Refund dialog window.

Credit Card Refund	×
Post Dt.: 7/12/2012	DOS/Recv.: 7/10/2012
Name: On Account	
Code: Payment	
Description: Mastercard	
Bill. Provider: Richard Smith DDS	
Treating Provider:	
Current Amount: \$1.03 CR	
Refund Amount 1.03	
	OK Cancel <u>H</u> elp

4. In the Refund Amount text box, type the refund amount, then click OK.

Note. You can do full or partial refunds.

You see the adjustment in the ledger as a Refund to CC and the transaction ID in the Comment column.

Ledger for	Account #	10382								
<u>Eile E</u> dit <u>V</u> iew	Reports D	ocuments <u>T</u> ools	DAIS <u>Y</u>	<u>H</u> elp						
	Schedule	Account	Pa	tient Recall Mgr	Tran	<b>R</b> sactions	Claim Hist	Report	s Pra	ictice L
Ledg	ger 📔	🖬 🗅 🎜	9	) 🗯 🖹 🎜 👬			R			
Account 103 Fee Schedul	8 <b>82</b> e: Basic		Guara Prov	ntor: Spring, Rachel ider: Smith DDS, Ri	chard M		Show	only charg leversals	es waiting	for insurance
Account Agi	ing						Paymen	t Estimate	s	
Current	Last Bill	Over 30 Over	er60 O	over 90 Over 120	Balance	e	Est. Insu	rance Port	ion Due:	\$422.00
\$212.03	\$0.00	\$123.94 \$	0.00	\$0.00 \$0.00	\$335.9	7	Est. P	atient Port	ion Due:	(\$86.03)
Post Dt.	DOS/Recv.	Name	Code	Description	Т	h. Srf./Qd	Amount	CR	Balance	ervice Date
3/29/2011	5/11/2010	Rachel Spring	D0120	Periodic oral eval #	est pt		\$52.00		\$354.00	
3/29/2011	5/11/2010	Rachel Spring	D0274	Bitewings-4 Films			\$68.00		\$422.00	
7/12/2012	5/11/2010	On Account	Payment	Check			\$85.00	CR	\$337.00	
7/12/2012	7/10/2012	On Account	Payment	Mastercard			\$1.03	CR	\$335.97	
7/15/2012	7/15/2012	On Account	Payment	Mastercard			\$1.03	CR	\$334.94	
▶ 7/15/2012	7/15/2012	On Account	Adj. 🤇	Refund to CC			\$1.03		\$335.97	
<										>
Color Key (	Reversal	Charge		Payment 🛛 🗖 Adji	ustment	📕 Re	bill Fee or F	inance Ch	arge	
5 5 🖃		Added	d by: BET	TY 07/15/2012 02:2	OPM E	dited By:	BETTY 07/1	5/2		

# **Process an ACH payment**

An automatic clearing house (ACH) payment is handled as an electronic debit to checking and savings accounts. You can make automatic clearing house (ACH) payments from the Tools menu in the following DAISY windows:

- Transactions
- Ledger
- Quick Estimate

You enter the payment either by typing in the bank routing and account information or by selecting a payment profile.

**Note.** For more information about payment profiles, see "Set up a payment profile" on page 42.

- To process an ACH payment from the Transactions window:
  - 1. From the DAISY toolbar, click 🜉 .
  - 2. In the Transactions window, click By Account.
  - 3. Click the Payments tab.
  - 4. Do one of the following:
    - If the account is listed in the Accounts/Patients tree on the left-side of the window, click the account name.
    - If the account is not listed, right-click in the Accounts/Patients section and select Select an Account. Search for the account, then double-click the account name.



#### 5. From the Tools menu, select ACH Payment.

You see the ACH Payment dialog window.

ACH Payment	
Use an existing p	payment profile or enter the check information.
Account #	11307 - Snider, Leona
Payment profile	None
Routing #	322288804 Check Type Account Type O Personal O Checking
Bank Account #	03378001186011111 OBusiness OSavings
Check Signer	Leona Snider
Amount	211.00 Check #
Memo	
Location	Dental Office
	Submit Cancel
	Submit

- 6. Do one of the following:
  - If you are entering all payment information manually, go to step 7.
  - If you are using a payment profile for this account, select the profile in the Payment Profile drop-down list, type the payment amount in the Amount text box, then go to step 16.

**Note.** For more information about payment profiles, see "Set up a credit card payment profile" on page 42.

- 7. In the Routing # text box, type the bank routing number.
- 8. In the Bank Account # text box, type the bank account number.
- 9. Under Check Type, choose one:
  - Personal to process a personal check.
  - Business to process a business check.
- 10. Under Account Type, choose one:
  - Checking for a checking account.
  - Savings for a savings account.
- 11. In the Check Signer text box, type the name of the person who authorized the payment.

For example, the authorizer could be the patient or the person whose name is on the bank account. You can type up to 25 characters, including spaces.

- 12. In the Amount text box, type the payment amount.
- 13. In the Check # text box, type the check number, if available.

Some individuals may want to void a personal or business check and use it as a record of the payment transaction.

- 14. From the Location drop-down list, select the office where the payment is being made.
- 15. In the Memo text box, type a memo about this transaction, if needed.

The memo displays in the Comment column for this payment in the Ledger window.

- 16. Click Submit.
  - If the ACH payment is approved, you see the DAISY A/R dialog box with the word "Approved."
  - If the ACH payment is denied, you see the DAISY A/R dialog box with the word "Denied."
- 17. Click OK to close the window.
- 18. In the Transactions window, you see the unposted payment in the Payments tab.



If you used a payment profile to make the payment, you also see "ACH On File" in the Comment column.



# Print a receipt for an ACH payment

After you complete the ACH payment, you can print a Visit Summary report that includes a responsibility statement and signature line. This report can be used as a receipt for the ACH payment.

	Centerpointe Dental Center	Deutal Lic#	23456						
	2039 NE 128th Ave Portland, OR 97220- (303) 483-6383	S\$ N/TIN							
	Activity for Account #11307 Guarantor Leona Snider 9876 Lake Haven Dr. Lake Oswego, OR 97035 Homenbone (503) 196-9941								
	Workphone (503) 566-9952								
	Date Patient Code Description		Amount						
	Payments 06/29/2012 On Account Payment ACH Acct.**4533		211.00 cR						
		Total Payments	\$211.00 CR						
Visit summary reports now have an authorization	I hereby authorize Centerpointe Dental Center to initiate debit(s) in the amount of \$211.00 to my checkir institution(s) identified by the routing number(s) above and banks to debit same to usuch account I ackm consideration hereof and I fuber agree that this authorization shall be non-revocable. I agree to pay merchant a returned item fee in accordance with the merchant's policy, which may be init I futher acknow ledge that I have completely read, understand, and received a copy of this agreement. Signature:	ng/savings accounts at the deposit owledge that I have received servi iated to my account for the items :	tory financial ices/goods in returned unpaid.						
line	Account Current Last Billed Over 30 Over 60 C	Ver 90 Over 120	Balance						
	S0.00 \$0.00 \$0.00	\$0.00 \$0.00	\$0.00						
	Last Payments Last Insurance Payment 06/26/1996 \$0.00 Last Personal Payment 07/15/2012 \$211.00 Thank you !	L ast Payments Last Insurance Payment 06/26/1996 \$0.00 Last Personal Payment 07/15/2012 \$211.00 Thank you !							
	Cogyright 2012 DAIST Version 4.2 Printed: 07/15/2012 07:11PM Report: 2142		Page 1						

- To print a receipt for an ACH payment:
  - 1. Open the Transactions window.
  - 2. Search for and select the account, then click OK.
  - 3. From the Reports menu, do one of the following:
    - Select Visit Summary.
    - Select Visit Summary with Patient Responsibility.
  - 4. Do one of the following:
    - To preview the report first, click Preview, then click 😂 to print it.
    - To print the report without previewing it, click Print.

### Void an ACH payment

You cannot void ACH payments in DAISY. To void an ACH payment, you must first log on to TransFirst Virtual Terminal and cancel the transaction, and then you remove it like any other transaction from the Ledger in DAISY.

You can cancel a transaction in TransFirst only if it has not been settled and only for the full amount of the original payment. After an ACH payment has been settled, you must issue a refund.

**Note.** ACH settlement occurs at midday.

For more information about voiding an ACH payment, see the Transfirst Virtual Terminal documentation.

### Manage ACH returns

ACH payments may be returned due to non-sufficient funds. To view returned ACH payments, you log on to the TransFirst Virtual Terminal and run the ACH Returns report. For more information about running the ACH Returns report, see the Transfirst Virtual Terminal documentation.

ACH returns also need to be reversed in the DAISY ledger.

- To reverse an ACH payment in the DAISY ledger:
  - 1. From the DAISY toolbar, click 📰 to open the Ledger window.
  - 2. Search for and select the account, then click OK.
  - 3. Right-click the ACH payment and select Reverse Payment.
  - 4. In the Payment Reversal window, optionally type a comment, then click OK.

Payment Reversal		$\mathbf{X}$
Use the <u>Transfirst V</u>	irtual Terminal_ to m	anage ACH payments
Post Dt.:	7/15/2012	DOS/Recv.: 6/29/2012
Name:	On Account	
Code:	Payment	
Description:	ACH	
Bill. Provider:	Richard Smith DDS	
Treating Provider:		
Current Amount:	\$418.00	
New Amount	\$0.00	
Comment		
		OK Cancel <u>H</u> elp

5. In the Confirm window, click No to complete the adjustment.



O Ledger for A	Account #1	4337									_ 0	×
<u>File E</u> dit <u>V</u> iew	Reports Do	ocuments <u>T</u> ools	DAIS <u>Y</u>	Help								
	Schedule	Account	Pa	tient Recall M	Agr Tra	<b>i</b> ansad	<b>c</b> tions	Claim Hist	Repor	ts Pri	ictice	L >
Ledge	er 📔	2 🗅	8	) 🎜 🗎 🗱	1 🗋	-8		<b>R</b>				
Account 1433 Fee Schedule:	7 Basic		Guara Prov	ntor: Sage, Kerri ider: Smith DDS,	Richard	М		Show	only charg Reversals	ges waiting	for insuranc	e
Account Agin	g Last Bill	Over 30 Over	er 60 C	over 90 Over 120	) Balan	ice		Paymen Est Insu	t Estimate	es tion Due:	\$0.00	1
\$0.00	\$0.00	\$0.00 \$	60.00	\$0.00 \$0.00	) \$0.	00		Est. P	atient Por	tion Due:	\$0.00	
Post Dt. D	OS/Recv.	Name	Code	Description		Th.	Srf./Qd	Amount	CR	Balance	ervice Date	•
2/13/2008	2/13/2008	Kerri Sage	D0140	Limited Eval - Fo	ocused			\$61.00		(\$82.00)		-
2/13/2008	2/13/2008	Kerri Sage	D0230	Intraoral Pa, Add	dl Film			\$19.00		(\$63.00)		
2/13/2008	2/13/2008	Kerri Sage	D0220	Intraoral Pa First	t Film			\$23.00		(\$40.00)		
2/13/2008	2/13/2008	Kerri Sage	D9951	Occlusal adjustr	ment - lim	14		\$40.00		\$0.00		
7/15/2012	6/29/2012	On Account	Payment	ACH				\$418.00	CR	(\$418.00)		
7/15/2012	6/29/2012	On Account	Adj. 🤇	Payment Revers	ial 🔿			\$418.00		\$0.00		
												~
						_			_		>	
Color Key 🔲	Reversal	Charge		Payment 📃	Adjustme	nt	Ret	oill Fee or F	inance Cl	narge		
\$ 🖬		Adde	d by: BET	TY 07/15/2012 0	8:39 PM	Edi	ted By: I	BETTY 07/	15/2			

You see the ACH payment reversed in the ledger.

# **Process auto-pay transactions**

When one or more auto-pay payments are due, you see an Auto-Pay Is Due link on both the Transactions window and the Daisy Central window.

DAISY Central								. 🗆 🔀	
<u>Eile Edit View R</u> eports DAIS <u>Y</u>	Help								
CARSY C Schedule	Account Patient	Recall Mgr	Transactions	Claim Hist	Reports	Prac	tice L	ist Maint	
DAISY Central 🟾 🕄	3	$\sim$	Auto-Pa	iy is Due	>	<u>New</u>	v electroni	ic remits	
Recent Items 📝 🛛 🗵	Today's Appointmen	nts for All R	lesources		• 7			×	
Appointments     Tra	Insactions								
Patients Ele El	dit <u>V</u> iew Reports <u>T</u> ools D	AIS <u>Y</u> <u>H</u> elp							
C Treatment Plans     Accounts     Malacim More	Schedule	Account Account	Patient	Recall Mgr T	Transactions	Claim Hist	Repo	orts Prac	tice List Ma
Malcolm Iviora	Transactions	2 🖬 🗅	28	1 👔 🚛 🖻	) 🥵 😫	8 D) E	i 🗈 🛱	R 1	
Leona Snider Bachel Spring	ccount By Type Electro	onic Remits	Auto-Pay Is	Due	•				
Michelle Robiso	ints / Patients	Charges F	Payments Ad	iustments Ac	count Info				
Carol Macy	0382 - Spring, Rachel	Adding Pay	ments for Ac	count: 10382	- Spring, R	achel			
John Zane	0981 - Macy, Carol	Date Ro	v. Billing Prov	ider	Method	c	heck Id	Amount	Deductible
Rhonda Vineyar	1307 - Snider, Leona 1323 - Mora, Malcolm	05/11/20	10 Smith DDS	, Richard M	Check		3244	\$85.00	\$0.00
Gloria Chavez	2442 - Chavez, Gloria	▶ 07/10/20 <sup>-</sup>	12 Smith DDS	, Richard M	Masterca	ard 74	1966944	\$1.03	
B Claims     Claims     B Claims     B Insurance Cover.     Charts     Patient History	2626 - Coleman, Timothy 2815 - Robison, Michelle 3088 - James, Colleen 4337 - Sage, Kerri								×
User: BETTY				Acces	unt Paymont	e: \$86.03	Fet Br	al After Postin	a: \$335.97
B. C		Unnested	Charges: \$1	ACC01	Unit r ayment	a. 900.03	C1 016 10	In Alter Postin	Adjustmente:

#### To process auto-pay transactions:

#### 1. In the Transactions or DAISY Central window, click Auto-Pay Is Due.

You see all of the auto-pay payments that are ready to be processed.

**Note.** Payments that are overdue for processing may have been declined. For more information, see the TransFirst Virtual Terminal documentation.

To process an auto-pay payment, the check box next to the auto-pay payment must be checked. All payments are checked by default.

 $_{
m 2}$  2. Uncheck any auto-pay payments that you do not want to process.

Please more t	e select the financial arrangements I than 3 days.	aving Auto-Pay due to be processed	now. Financial	arrangements showning Red are overdue b
Account	Guarantor	Amount Due	Date Due	Prior Transaction Info
13716	Land, Mylan	\$256.15	07/02/2012	06/02/2012
			/	
				OK Cancel

**Note.** Regardless of an account's balance, this dialog window does not show auto-pay accounts that are in collection.

3. Click OK.

In the Transaction window, DAISY creates an unposted transaction for each automatic payment. In the Comment column of each transaction you see "Auto-Pay."

After you process automatic payments, DAISY does the following:

- Calculates the next payment due date based on the prior due date, even if the prior payment was processed late or declined.
- If the prior payment's due date was on the 29th, 30th, or 31st of the month, and the next payment is due on a month that does not have as many days, DAISY sets the payment due date for the last day of the month.
- When an automatic payment is declined, it remains in the Process Auto-Pay dialog window, so you can include it the next time you process auto-pay payments.

To not process an auto-pay payment, uncheck the check box

Payments overdue for processing by more than 3 days display in red

This column shows last time that the payment profile associated with the financial arrangement was used for a transaction



# CHAPTER 4 Other Enhancements

## Verify mailing addresses

In the Personal Info window, you can now verify mailing addresses using information from the U.S. Postal Service (USPS). Verifying mailing addresses helps to maximize collections and ensure that electronic claims process reliably.

- To verify a mailing address:
  - 1. From the DAISY toolbar, click
  - 2. Search for and select the appropriate person, then click OK to open the Personal Info window.
  - 3. To the right of the Street text box, click Not Verified.

Personal I	nfo Christine Zane (Chris)
<u>File E</u> dit <u>V</u> iew	v <u>R</u> eports <u>T</u> ools DAIS <u>Y</u> <u>H</u> elp
DAISY	Schedule Account Patient Recall Mgr Transactions
🔓 Pers	onal Info. 🛛 😅 🗔 🗅 🛛 🎜 😂 🚜
Prefix First	Middle Last Suffix
Christin	ne Zane
Care Of	(Optional)
Street	345 S Mulino Rd
City	Canby
State	OR Zip 97013 - OMale
Nickname	Chris • Female
Birth Date	05/21/1953 SSN
E-Mail	
Employment	Not Applicable
Phone Nun	nbers 😝 😑
Туре	No. Ext.
Home	✓ (503) 872-6642
Primary pho	one for appointments Home
Reminder S	Scheme Use Practice Default Use AutoRemind
Practio	ce Scheme No Reminder
Added by: Adr	ministra 03/22/2005 08:57 AM Edited By: BETTY 03/30/2012 03:36 PM



- 4. Do one of the following:
  - If the address matches the information in the USPS database, you see that the address verified and the verification date. Close the window.

Personal I	Info Christine Zane (Chris)
<u>File E</u> dit <u>V</u> iew	v <u>R</u> eports <u>T</u> ools DAIS <u>Y</u> <u>H</u> elp
DAISY	Schedule Account Patient Recall Mgr Transactions
🧧 Pers	sonal Info.   🚰 🗔 🗅   🎜 😂 🛛 💰
Prefix First	Middle Last Suffix
Christi	ne Zane
Care Of	(Optional)
Street	345 S Mulino Rd
City	Canby Gender
State	OR Zip 97013 - OMale
Nickname	Chris
Birth Date	05/21/1953 SSN
E-Mail	
Employment	Not Applicable

• If the address cannot be verified, you see a warning. Click OK and close the window.

Personal I	nfo Christine	Zane (Chris)				×
<u>F</u> ile <u>E</u> dit <u>V</u> iew	<u>R</u> eports <u>T</u> ools	DAIS <u>Y</u> <u>H</u> elp				
DAISY	< Schedule	Account	Patient	Recall Mgr	Transactions	>
🧧 Pers	onal Info.	2 🖬 🔁	284	\$		
Prefix First	Mi	ddle	Last		Suffix	
Christi	ne		Zane			
Care Of				(Optional)		
Street	345 S Mulino Rd			Not verified		
City	Canby					
Warn	ing					
Nick Birth E	The U.S. Postal	Service indicate	es this addres	s may be unde	eliverable.	
Employ		<u>_</u>	K			

**Note.** A correct zip code is not enough to verify an address. The street address, city, state, and zip code must all be correct in the Personal Info window.

### Manage user accounts

Starting with DAISY 4.2, you manage user accounts from a new User window.

Note. Only DAISY users who have full access rights can change user settings.

#### • To manage a user account:

1. From the DAISY menu, select Configure, then select Users.

Account - 10328				
File Edit View Reports Documents Tools	DAISY Help		-	
Schedule Account	Account Appointment	+ + +	Transactions Claim	Hist Reports
Account 🔐 🖬 🗅 🏾	Patient	•	b 🕒 💀 🖬 🗑	<b>i</b>
Guarantor 1 A Inac John Zane 345 S Mulino Rd Canby, OR 97013 E-Mail: Insurance Coverage A A Inac Ins Co ID Insurance Company Ins 1194 ODS PE 1194 ODS Cit	t Configure Closing Reports Document Mgr DAISY Central RX Inbox 20 3D Imaging Configure DAI Configure DAI	F I ISY Toolbar vord	Practice Providers Procedures Procedures List Maint Connections Detail Templates Appointment Chart	D Group # 9380D5 D36026
Financial Info General Patients Fina	n 🌆 Exit		Reminders	
	1	,		
Patient Name	Birthdate	Last Prophy	SSN	Age
John Zane Christine Zane	02/12/1941 05/21/1953	04/08/2008 04/08/2008	•••	71 58
				#
Added by: Administra 03/01/1987 12:00 /	AM Edited By: D	MCHelp 03/19	)/2012 04:58 PM	<u> </u>

#### 2. Do one of the following:

- Search for and select the user account, then click OK to open the User window.
- To add a user account, click New User to open the User window.



3. Click the Security tab.

<u>File E</u> dit <u>V</u> iew Reports <u>T</u> ools DAIS <u>Y</u> <u>H</u> elp					
CASE Count	Patient Recall Mgr	Transactions	Claim Hist	Reports	Prac
🕵 User  🗃 🗅 🎜 😂					
User Name JANE					
Jane L.	Sanders				
Security EDI					
Security					
Permissions	Appointment Permis	sions			
Allow access to Account?	Allow access to Appoi	int?	2		
Allow access to Patient?	Allow access to Con	firmation?	. 💌		
Allow managing prescriptions?	Allow access to Foll	ow-Up?			
Allow access to Insurance?	Allow access to App	ot. Config?			
Allow access to Transactions?	1	View None Modify			
Allow Posting Adjustments?	0.1.1.5				
Allow access to Report Gallery?	Scheduling	00			
Allow access to Practice?	Access to Practice C	onfig.			
Allow access to Lists?	Practice	000			
Allow access to Closing?	Financial Cature	000			
Allow access to Wizards?	Financial Setup	000			
Allow access to Charting?	System Defaults	000			
Allow deleting users?	Collection Messages	000			
Allow access to Recall Mar?	Other Messages	000			
Allow access to Quick Estimate?	Location	000			
Allow access to Detail Responses?.	AutoRemind	000			
Allow access to design changes? 🗹	Autorenning	000			
Allow access to Detail Templates?	EDI	$\left[ \bigcirc \odot \bigcirc \right]$			
Allow review of Detail Responses? 🔽	Access to User Confi	g.			
Allow accord to Decument Mar2					

4. Do one of the following:

- If you are adding a new user account, type the new user name, first name, middle name, and last name.
- If you are modifying a user account, go to step 5.
- 5. Select or modify the appropriate permission and access settings.
- 6. Click 🔚 , then close the window.

**Note.** DAISY logs changes to security settings in the Activity Log and the Security Log.

To add an account, type the new user account name and the user's full name here

### Reset a user password

DAISY administrators with Security Officer access can now reset a user account to its original default password.

**Note.** Users cannot reset their own passwords, and only DAISY support representatives can change the password on a user account that has the Security Officer permission.

- To reset a user password:
  - 1. From the DAISY menu, select Configure, then select Users.
  - 2. Search for and select the user account whose password needs resetting.
  - 3. Click OK to open the User window.
  - 4. Click the Security tab.

User - REBECCA						
File Edit View Reports Tools DAISY Help						
CASE Content of the second sec	EBECCA Patient	Recall Mgr	Transactions	Claim Hist	Reports	Practice >
💯 User 🧉 🖬 🗅 🎜 😂						
User Name REBECCA						
Rebecca S	La	anxon		]		
Security EDI						
Security						
Permissions	Appointm	ent Permi	ssions			
Allow access to Account?	Allow acce	ess to Appo	int?			
Allow access to Patient?	Allow ac	cess to Co	nfirmation?[			
Allow managing prescriptions?	Allow ac	cess to Fol	low-Up?[			
Allow access to Insurance?	Allow ac	cess to Ap	pt. Config?[			
Allow access to Transactions?			View None Modify			
Allow Adjustments/Reversals?			None Mouly			
Allow Posting Adjustments?	Schedul	ing	000			
Allow access to Report Gallery?						

5. From the Tools menu, select Reset Password for user name.

In this example, the user name is REBECCA.

6. In the Info dialog box, click OK.



7. Close the User window.



## **Treatment plan reports**

Г

When you run the Tx Plan Proc. Not Done report (R2003), located in the Treatment Plans folder in the Report Gallery, it now shows a patient's accepted treatment plan procedures, even when those procedures are attached to a canceled or pending appointment.

For example, the following canceled appointment for Christine Zane has one accepted treatment plan procedure attached:

	Appointment	for Zane, Ch	ristine (Chri	s)				
	<u>File E</u> dit <u>V</u> iew I	<u>R</u> eports Docum	ents <u>T</u> ools D	AIS <u>Y</u> <u>H</u> elp				
		Schedule	Count Account	Patient	Recall Mgr	Transactions	Claim Hist	Re Re
	📑 Appoi	ntment	2 🔒 🎽	2 🛍 2	a 🗐 🛒 🖡	II 🗱 👪 🗯	🖹 🔝 🚺	78 🖓 🔞
	Description	9			Sched	uled Mond	lay <u>M</u> ir 0 AM <u>60</u>	nutes
	Adult Prophy				04/16/	2012 🗸 12:10	) PM 🍨	
					Priority Stand	/ Sta	itus	
	Detail More	Procedures	Account Pa	tient - Zane, Cl	nristine (Chris	5)		
	Appointmen	t Procedure	S					
The canceled	TP Prov Nan	ne	Proc. Th.	Surface Quad.	Fee M	lin. Description	n	Note on
appointment has a	🕨 Y 💌 Smith Dl	DS, Richard M	I D1110		\$91.00	0 Prophylaxi	s, Adult	
procedure attached	<							>
	Prophylaxis, Ad	ult				Tot	al: \$91.00	Accepted
	Q ⊥ □ <b>→</b> B	\$ 1 1 1	9 🛛 🕄					

You see that the accepted procedures attached to Christine's canceled appointment show on Tx Plan Proc. Not Done report (R2003):

	Report: 2003	Tx	Plan Proc. Not	Done			
	Zane, Christine (Chris)	Age: 59 Acct: 1032	8 Bal: \$842.98			Pı	ri. Ins.
	345 S Mulino Rd	Home: (503) 872-664	2 Last Svc: 02/20/12	Ben.	Remaining:	\$2,0	00.00
	Canby, OR 97013	Work:	Next Svc:	Dedu	ct. Remaining	: \$	\$25.00
				Annu	al Max	\$2,0	00.00
	Treatment Proposed: 01/18	/12					
	Procedure Description	n Toot	h/Quad Status	Fee	Pri. Est	Sec. Est	Est. Pat. Resp.
he accepted treatment —	D1110 Prophylaxis,	Adult	Accepted	91.00	91.00		0.00
lan procedures show	D2392 Resn Based	Composite-2 Surf., 4 OE	Proposed	201.00	140.80		60.20
an procedures show	D2750 Crown, Pore	W/High Noble 2	Proposed	924.00	462.00		462.00
n the Tx Plan Proc.	D2391 Resn Based	Composite-1 Surf., 12 B	Proposed	162.00	129.60		32.40
lat Dana rapart	D2391 Resn Based	Composite-1 Surf., 14 O	Proposed	162.00	129.60		32.40
	D2391 Resn Based	Composite-1 Surf., 13 B	Proposed	162.00	129.60		32.40
	D2750 Crown, Pore	W/High Noble 15	Proposed	924.00	462.00		462.00
	D0240 Intraoral Occ	clusal Film	Proposed	0.00	0.00		0.00

## Set up a default disclaimer for financial arrangements

You can now set up a default disclaimer for financial arrangements. By default, this disclaimer displays on all of the practice's financial arrangements.

**Note.** You may also type a different disclaimer on individual financial arrangements.

- To set up the default disclaimer for financial arrangements:
  - 1. In the Practice window, click the Financial Setup tab.
  - 2. In the Financial Arrangement Default Disclaimer section, type the disclaimer that you want to show on every financial arrangement by default.
  - 3. Click 🔚 to save the settings.

### **Financial arrangement summary report**

You can now filter the Financial Arrangement Summary report (R2113) for all payments, payments made with auto-pay, or payments made without auto-pay.

**Note.** For more information on auto-Pay, see "Set up an auto-pay financial arrangement" on page 47.

In the Account window, you run the report from the Reports menu.

On the report you see the following information for accounts with financial arrangements that have auto-pay:

- Last Payment Date
- Next Payment Date
- Last Transaction Status
- Overdue

	2113		Financi	ial Arr	angem	ent S	Summ	ary
Account	Guarantor #1	Home Phone	Principal	Date of Est	Last Pers.	Pmt.	Current	Last Bill
	Provider	Work Phone	Monthly Pmt	Due Day	Last Ins.	Pmt.		
12513	Kane, Kelley	(503) 322-6110	300.25	07/22/2012	05/03/2004	64.00	0.00	0.00
	Smith DDS, Richard M	(503) 002-5390 x286	83.83	20	03/26/2004	105.00	Est. Insu	rance Due:
	$\langle$	Last Payment Date 07/2 Last Transaction Status App	20/2012 Next roved on 7/20/2012	Payment Date	08/20/2012	01	rerdue? N	>
13716	Land, Mylan	(360) 186-6661	1,458.00	06/29/2012	10/02/2002	92.15	0.00	0.00
	Smith DDS, Richard M	Last Payment Date Last Transaction Status	256.15 Next	20 Payment Date	07/02/2012	0.00 Ov	Est. Insu rerdue? Y	irance Due:


- To run the Financial Arrangement Summary report:
  - 1. From the DAISY toolbar, click 🥰 .
  - 2. From the Reports menu, select Financial Arrangement Summary, then select one of the following:
    - All to include all financial arrangements.
    - With Auto-Pay to include only auto-pay financial arrangements.
    - Without Auto-Pay to exclude auto-pay financial arrangements.

Account - 1	3716	
File Edit View	Reports Documents Tools DAISY Help	
	Account Ledger for Acct 13716	🛒 🚰 🔝 🔍
UAID Y	Account Profile for Acct 13716	Transactions Claim Hist Reports
Acco	Account History for Acct 13716	
	Account Notes for Acct 13716	
Guarantor 1	Financial Arrangement with Insurance for Acct 13716	Туре
Mylan Land	Financial Arrangement without Insurance for Acct 13716	Home
393 NE Lewis	Statement History for Acct 13716	
Battleground,	Visit Summary for Acct 13716	
	Visit Summary with Patient Responsibility for Acct 13/16	
E-Mail:	Financial Arrangement Summary	LA LA
Insurance C	Merge Docs	With AutoPay
Ins Co ID Insu		Without AutoPay
	Printer Setup	
<		>
Financial Info	General Patients Financial Arrangement Statement	s Reminders Payment Profiles
General	L II II.	
Provider Sn	nith DDS. Richard M V Fee Schedule	Basic
Start Mag		
Stmt. Ivisg		
Account	Acco	unt Options Print Stmt Estimates
	⊻ Se	nd Statements Collection Account
	⊻Fir IZ Co	Inance Charges Medicaid Account
	Re	quest QuickStatement
	L Sta	atement Reviewed
Added by: Adm	inistra 08/12/2002 12:00 AM Edited By: DMCHelp 06/29	9/2012 07:01 PM

3. In the Print Options window, click Print to print the report.

Note. You can also filter and run the report from the Report Gallery.

- To run the Financial Summary Report from the Report Gallery:
  - 1. From the DAISY toolbar, click 🚺 .
  - 2. Double-click the Financial Arrangements folder.
  - 3. Right-click the Fin. Arr. Summary report and select Properties.
  - 4. Click Reset to remove any filtering from the last time you ran the report.

#### 5. Click the Auto-Pay tab.

#### 6. Choose the filters you want to apply.

In the following example, the filters are set to show all auto-pay payments.

Property Editor - Fin. Arr. Summary	×
General Definition	_
Fin. Arr. Summary	
Type Report	
Description	
Financial Arrangement Summary: R2113 Parameters	
Fin. Arr. OverDue Auto-Pay	
Auto-Pay	
is 💙 equal to 💙 Y	
OK Cancel Reset	

- 7. Click OK.
- 8. In the Financial Arrangements window, double-click the Fin. Arr. Summary report.

Financial Arrangements		
<u>File E</u> dit <u>V</u> iew		
Name	Туре	Description
≝ Fin. Arr. for Acct w/o Ins. ≝ Fin. Arr. for Acct with Ins. ≝ Fin. Arr. Summary	Report Report Report	Financial Arrangement for Account without insurance: R2012 Financial Arrangement for Account with insurance: R2011 Financial Arrangement Summary: R2113
<		



## **Account Statements**

When an account's financial arrangement includes automatic payments, the account's statements and statement previews include:

- "Auto-Pay" next to the payment type, such as ACH, Visa, or MasterCard
- The sentence "Financial arrangement payment will be automatically billed on *next due date,*" and the amount of the payment

**Note.** If the final payment is less than the regular monthly payment, then the statement will show the correct payment amount.

			M 2: P	alcolm Mora 34 NE Pacific ortland, OR 97230		
Centerpointe De 2039 NE 128th Portland, OR 9	ental Center Ave 7220		H	AS YOUR ADDRESS CH.	ANGED?	
MAKE SURE THE AI APPEARS IN THE E	DDRESS ABOVE INVELOPE WINDOW		PL	EASE PRINT THE ACCO TURN WITH TOP PORT	UNT NUMBER ON YOUR CHE ION OF THE STATEMENT	CK AND
PAGE 1	TE DATIENT		DESCR	PTION		ACCOUNT #1132
6/1/2012 6/1/2012	On Account	Payment ADI	Previo ACH A Transf	us Balance Auto-Pay -Thank Yo er	u!	1,272.00 1,072.00 3 200.00
6/1/2012	On Account	Payment	ACH A	Auto-Pay -Thank Yo	u!	1,072.00
	1.5	Financial an	rangement payr	nent will be automat	ically billed on 08/02/12	337.58
CURRENT	OVER 30	o charge of 1.5%	ver 60	OVER 90	OVER 120	NEW BALANCE
2,	328.00	0.00	0.00	0.00	0.00	2,328.00

Accounts with auto-pay financial arrangements include the next billing date and the billing amount

## **Appointment status history**

When you view the Status History section in the More tab of the Appointment window, you now see more detailed information about AutoRemind confirmations.

Prior to 4.2, the confirmation always read "Confirmed by *username*." Starting with 4.2, confirmations are more specific, such as "Personal confirmation by RemindSvc."

Appointment for Zane, Christine
Elle Edit View Reports Documents Tools DAISY Help
Schedule Account Patient Recall Mgr Transactions Claim Hist Reports Practice 2
🔣 Appointment   🥔 🖬 🗅   🎜 🛍   ঌ 🗃 🥵 🚛 🖉 🎗 🔉 🕼 🖏 🖏 🖓 🥔 🥒 🤅
Description
Adult Prophy
Standard V Scheduled V
Detail More Procedures Account Patient - Zane Christine
More Information
Lab Lab Required?
Follow Up Followed Up
Needed by
Reason
Pre-medication
<u>^</u>
×
Appointment Notes 🕎 🔍 Status History
04/14/12 08:17:53 PM - Added by BETTY
04/16/12 02:00:09 PM - Left confirm. message by REBECCA
04/17/12 05:00:53 PM - Confirmed in person by BETTY



# **Prescription printing (without e-prescribing enabled)**

If your office does not subscribe to DAISY eRx or does not have e-prescribing enabled, leave the Issue Method blank to automatically default to Print when you print a prescription.

	Prescription #	76 - Oliver	Swift - Amo	kicillin 500 mg		×		
	<u>File E</u> dit <u>V</u> iew Re	ports <u>T</u> ools	DAIS <u>Y</u> <u>H</u> elp					
		Schedule	Account	Patient	Recall Mgr	Transactic		
	R Prescr	ption	2 🔒 🎽	23				
	Patient Oliver Swift 10505 SE 17th Av Milwaukie, OR 97	/e. 222	Service	Location Denta Birthdate 12/01/ E-Mail Phone	I Office 1957	¥		
	Prescription Type	Amoxicillin	500 mg					
	Date	10/10/2011	Provide	er Lorey DDS, M	ichelle P	~		
If Issue Method is blank,	- Issue Method							
Print	Medication	Medication Amoxicillin 500 mg						
	Dispense	#30			Refills	Days Supply 7		
	SIG	Take 1 tab	every 6 hours	s until gone				
	511.10							
	Printed Comment	s 🕑 🖄						
	Added by: BETTY	04/14/2012	07:58 PM E	dited By: BETTY	04/14/2012	08:10 PN 🤐		

After you print the prescription, you see Print in the Issue Method drop-down list and the Prescription window becomes read-only.

Prescription #	122 - Oliver Sv	vift - Sudafe	d		×
<u>F</u> ile <u>E</u> dit <u>V</u> iew Rep	ports <u>T</u> ools DAI	(S <u>Y</u> <u>H</u> elp			
	Schedule A	ccount count	Patient	Recall Mgr	Transactic
Prescri	ption 🛛 🚰	🗖 🗅 🛛 🕄	9		
Patient 📝 👍	]	Service Loc	ation Der	ntal Office	~
Oliver Swift		Birth	ndate 12/0	1/1957	
10505 SE 17th Ave Milwoukie OR 972	e. 222	E	-Mail		
Willwaukie, OK 572		۲	none		
Prescription Type	Amoxicillin 500	mg			
Date	04/22/2012 🗸	Provider L	orey DDS,	Michelle P	~
Issue Method	Print		*		
Medication	Amoxicillin 500	mg			

## **Patient Chart report**

The Patient Chart report (R2601) now includes reported medications (called MEDS). This report is available from the Reports menu in the Patient History window.

#### • To view entry types in the Patient Chart report:

- 1. From the DAISY toolbar, click 🗧 .
- 2. Search for and select the patient, then click OK.
- 3. In the Patient window, click 🔐 to open the Patient History window.
- 4. In the Display Options section, check the RX/Meds check box.
- 5. From the Reports menu, select Patient Chart.

Patient History - Oliver Swift							_	
File Edit View Reports Documents Too	ols DAISY Help							
Patient Chart Patient Chart Patient Chart	s Patient	Recall Mgr	Transactions	Claim Hist	Reports	Practice	List Maint	Proc
Clinical Note Detail	1 2 3	- 🗊 👬 🚛	🕼 💀 🛛 🖌	P 🖬 🖬 🕻	J			
Patient			Filter 🍞					
Oliver Swift Print Window	ge: 54	_	Dates	of Service	Tooth	<all> 🗸</all>		1
10505 SE 17th Milwaukie, OR Printer Setup	te: 12/1/195 er: M	7	From	~	Procedure	<all></all>	~	
	E-Mail:		То	~	Perf. Provider	<all></all>	~	
			Description					
		en er here	le ru			10		
Srv. Date V Tooth Srf./Qd	Entry Type Per	Provider Note	Description			Status		ptions
<u>&gt; 04/22/2012</u>	RX Ma	yfield, VVilli	Peridex 0.12	% Mouthwas	h	Completed		be
04/22/2012	RX Lore	ey DDS, M	Sudafed			Completed	Existing	cu
04/22/2012	RX Lore	ey DDS, M	Amoxicillin 5	00 mg		Completed	Condition	าร
04/21/2012	MEDS		Adult Low Do	se Aspirin 81	mg Tab, Delay	Completed	PerioExa	ams
04/21/2012	MEDS		Adult Low Do	ise Aspirin 81	mg Tab, Delay	Completed 🗸	Clinical N	Votes
						>	Referrals	•
Narrative							Medical	₽ Alert
No Known Allergies.						~	Select	All
							Deleted	Itomo
								items
						~		
🕂 🔁 🖾 🗖 🖬 🖬 🖬 Add	ed by: BETTY 04/	22/2012 04:52	PM Edited By:	DBA 04/22/2	012 08:58 PM			

You see the Patient Chart report with both prescriptions and medications.

				I attent Cha				
							Center	2039 NE 128th Ave Portland OR 97220-
Swift Olive	ar .			Home				
10505 SE 1	7th Ave.			Work				
Milwaukie,	OR 97222							
Birthdate Age	12/01/1957 54			Employment Status Student Status	Not A N/A	.pplicable		
Gender	М	Last Service		School/City				
Added	03/26/2012	Changed	04/16/2012	Referred By				
Svc Date	Tooth/Srf./Qd		Description		Amount	Status	Add Date	Performing Provider
04/22/2012		RX	Amoxicillin	500 mg		Completed	04/22/2012	Lorey DDS, Michelle
04/22/2012		RX	Sudafed			Completed	04/22/2012	Lorey DDS, Michelle
04/22/2012		RY	Peridex 0.12	? % Mouthwash		Completed	04/22/2012	Mayfield, William
04/21/2012	(	MEDS	Adult Low I mg Tab, Del	Dose Aspirin 81 laved Release		Completed	04/21/2012	-
04/21/2012		MEDS	Adult Low I	Dose Aspirin 81		Completed	04/21/2012	



## **Prescription searches**

DAISY 4.2 has new search capabilities to help you locate a patient's prescriptions and prescription types.

### Search for patient prescriptions

You can now search for a patient's prescriptions by:

- Prescription status, such as lapsed, authorized, or pending
- Issue type, such as electronic, handwritten, or print
- To search for a patient's prescriptions by issue type:
  - 1. From the DAISY toolbar, click 🗧 .
  - 2. Search for and select the patient, then click OK.
  - 3. In the Quick Access toolbar, click 💿 to open the Search For Prescriptions window.
  - 4. In the drop-down list, select Issue Type.

Se	earch For - Preso	criptions - Swift	, Oliver		
	Issue Type Date Dispense SIG Refills		More ≥>		
Au Se	Issue Type Status Prescription Typ	e	v v	Status	~
Þ	76			Lapsed	
	121	Hand Written		Authorized	_
	115	Electronic		Lapsed	=
	123	Electronic		Authorized	
	122	Print		Lapsed	-
	126			Authorized	
	127			Authorized	
	79			Lapsed	
					~
<	J				
	New Prescriptions	- Swift, Oliver		OK Cancel Help	
Er	nter a search value	e for Issue Type		Ordered by Medication asce	

- 5. Click either Begins With or Contains.
- 6. Type the name of the issue type, such as Electronic.
- 7. Select the result you want, then click OK to open the prescription.

- To search for a prescription by status:
  - 1. From the DAISY toolbar, click 🗧 .
  - 2. Search for and select the patient, then click OK.
  - 3. In the Quick Access toolbar, click 💿 to open the Search For Prescriptions window.
  - 4. In the drop-down list, select Status.
  - 5. Click either Begins With or Contains.
  - 6. Type the status of the prescription, such as Lapsed.
  - 7. Select the result you want, then click OK to open the prescription.

### Search for prescription types

You can now search for a patient's prescription types by days supply.

- To search for a patient's prescription types by days supply:
  - 1. From the DAISY toolbar, click 🗧 .
  - 2. Search for and select the patient, then click OK.
  - 3. Click the Prescriptions tab.
  - 4. In the Prescription tab, click 🔹 to open the Search For Prescription Type window.
  - 5. In the Search By drop-down list, select Days Supply.

Search For - Prescription Type			
Search <u>by:</u> Days Supply V More >>	)		
Is less than	J		
30			
Auto Search 🗹 Select one or more items:	12		
Prescription Type	Refills	Dispense	
▶ Sudafed	0	21	
		OK	Cancel Help
Searching for Days Supply is less than 30	Orde	red by Dispense asce	end .:



- 6. Select whether the days supply is less than, greater than or equal to the number of days you are searching for.
- 7. Type the number of days.
- 8. Select the result you want, then click OK to open the prescription type.

## **Reports menu**

In the Patient window, the Reports menu now displays the description of a selected prescription rather than the prescription type. For example, if you select the patient's prescription for Vicodin 500 mg issued on October 10, 2011, you see:

🔘 Patient - Oli	iver Swift						
File Edit View	Reports Documents Tools DAISY Help		_				
TAIDY	Patient Profile for Oliver Swift					1	šē .
UAID \	Patient Notes for Oliver Swift		ransaction	ns (	Claim Hist	Reports	Practice
Patie	Route Slip for Oliver Swift	+			P 🚯 🥒		d
	Blank Route Slip		S QUA	40 4	•••		
Patient	Claim Summary for Oliver Swift		e		Photo [		
Oliver Swift	Financial Arrangement with Insurance for Acct # 14424		ular Pho	ne			
10505 SE 17th Milwaukie OR	Financial Arrangement without Insurance for Acct # 14424						
WillWadkie, Ork	Visit Summary	+					4
	Visit Summary with Patient Responsibility	۲					
Birthdate: 12/0	Ledger for Acct # 14424						
E-Mail:	Prescription: Vicodin 500 mg 10/10/2011						
Accounts 📝	Today's Prescriptions		Provi	der			
14424	Current Medications		Lorev	DDS. I	Michelle P		
	Monthly Prescription History						
	Referral Summary	•					
General Inform	Referred To Specialist		ers/Tags	Medi	cal Alerts	Prescription	is Medi < ≯
Prescription	Recall Listing	+					
Rx Type	Recall Labels	+		Refills	Provid	er SIG	Status 🔺
Rx	Recall Cards	۲		0	Lorey	DDS 3 times	pei
Rx	Merge Docs	•		0	Lorey	DDS 3 times	рег
eRx			-	3	Mayfie	eld, V place 1	5 m Authori:
Rx	Print Window			0	Lorey	DDS Take 4 t	tab:
eRx	Printer Setup			0	Mayfie	eld, Vtake 1 o	ap:Lapsed
Rx	10/10/2011 Amoxicillin 500 mg #30			0	Lorey	DDS Take 1	tab
Rx	10/10/2011 Vicodin 500 mg 20 (twent	y) t	abs	0	Lorey	DDS take 1 t	ab 🗸
<							>
Added by: DMC	Help 03/26/2012 01:09 PM Edited By: BETTY 04/25/2	012	2 08:26 PI	M			

## Transfer payments to another account

If you accidentally enter a personal payment, such as a credit card payment, ACH payment, check, or cash payment on the wrong account, or post a payment to the wrong account, you can now transfer the payment to the correct account. You do not need to reverse the payment.

You can only transfer personal payments to another account. Payments from an insurance company or other third party cannot be transferred.

**Note.** When you transfer a personal payment to another account, all related refunds, if any, transfer with it.

#### Transfer an unposted payment

- To transfer an unposted payment:
  - 1. Open the Transactions window.
  - 2. Search for and select the account, then click OK.
  - 3. Click the Payments tab.
  - 4. Right-click the payment and select Transfer to Another Account.
  - 5. Search for and select the account, then click OK.

You see a transfer confirmation.

DAISY A/R
The selected transaction was successfully transferred to Account 10382
<u> </u>

6. Click OK to close the dialog window.

DAISY opens the Transactions window and you see the transferred payment for this account.

**Note.** The Activity Log records the transfer of unposted payments, including the account information and the transaction amount.



## Transfer a posted personal payment

- To transfer a posted personal payment:
  - 1. Open the Ledger window.
  - 2. Search for and select the account, then click OK.
  - 3. Right-click the payment and select Transfer to Another Account.
  - 4. Search for and select the account, then click OK.

You see a transfer confirmation.

5. Click OK to close the dialog window.

In the Ledger window, you see a payment reversal on the original account.

**Note.** The Activity Log records the transfer of unposted payments with account information and the transaction amount.



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902152 (05/12)