RELEASE NOTES

DAISY 4.2

NEW FEATURES

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

DAISY 4.2 Update
Release Notes

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 daisysales@dmcdental.com.

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 dmcdental@transfirst.com.

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 e-prescribing 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 ( )
- 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 e-prescribing 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

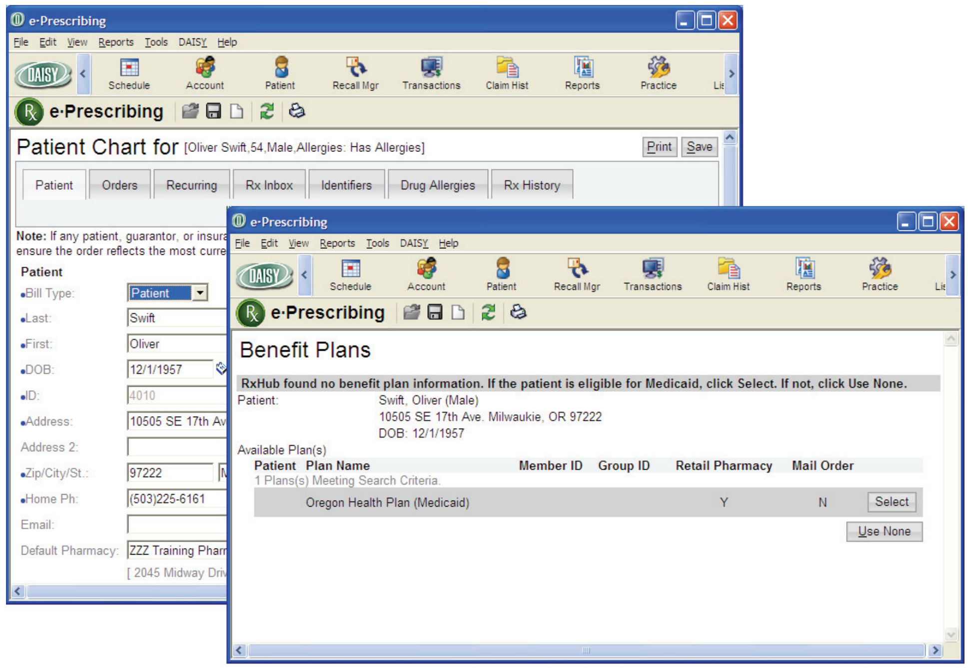
DAISY eRx enables dental offices to issue electronic prescriptions through Clinician, a service managed by Emdeon. This feature enables you to access patients' existing drug prescriptions covered by insurance and order new prescriptions electronically. DAISY eRx also offers improved prescription security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

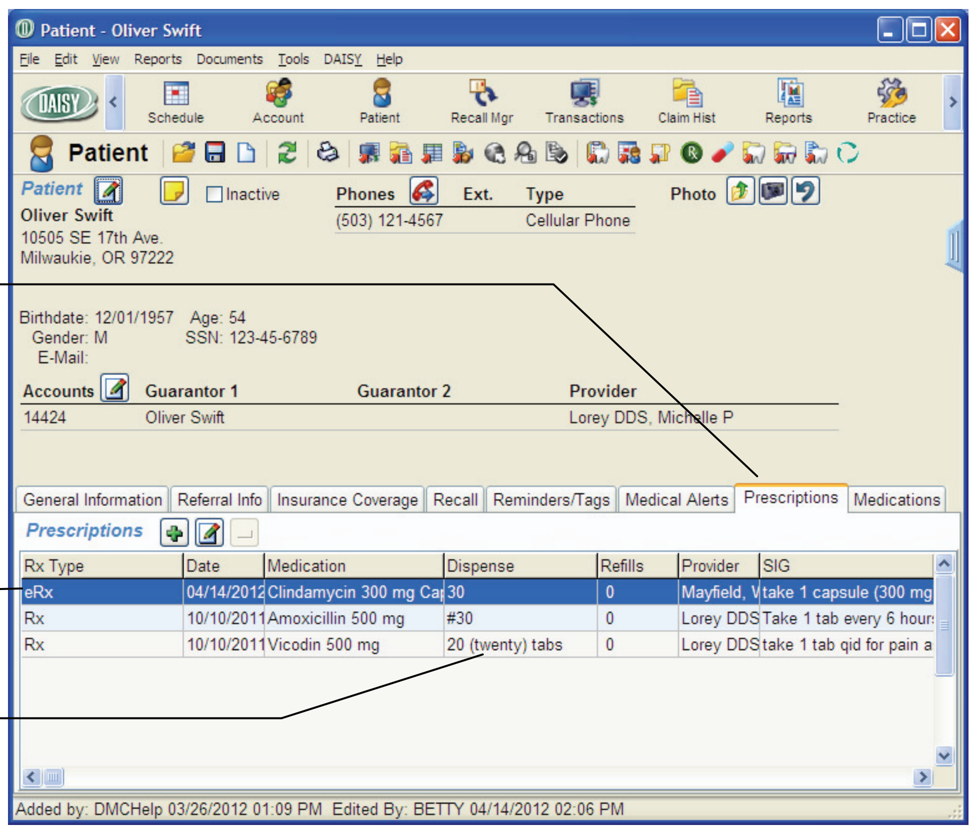
  When you view prescriptions that originated in DAISY (Rx), they automatically open in the DAISY Prescription window. When you view prescriptions that originated in Clinician (eRx), they automatically open in the Rx History Details window in Clinician. For more information on the Rx History Details window, 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.

From the Prescriptions tab, you can view all of the patient's prescriptions issued by the practice, including e-prescriptions issued through Clinician

This Rx Type indicates an e-prescription

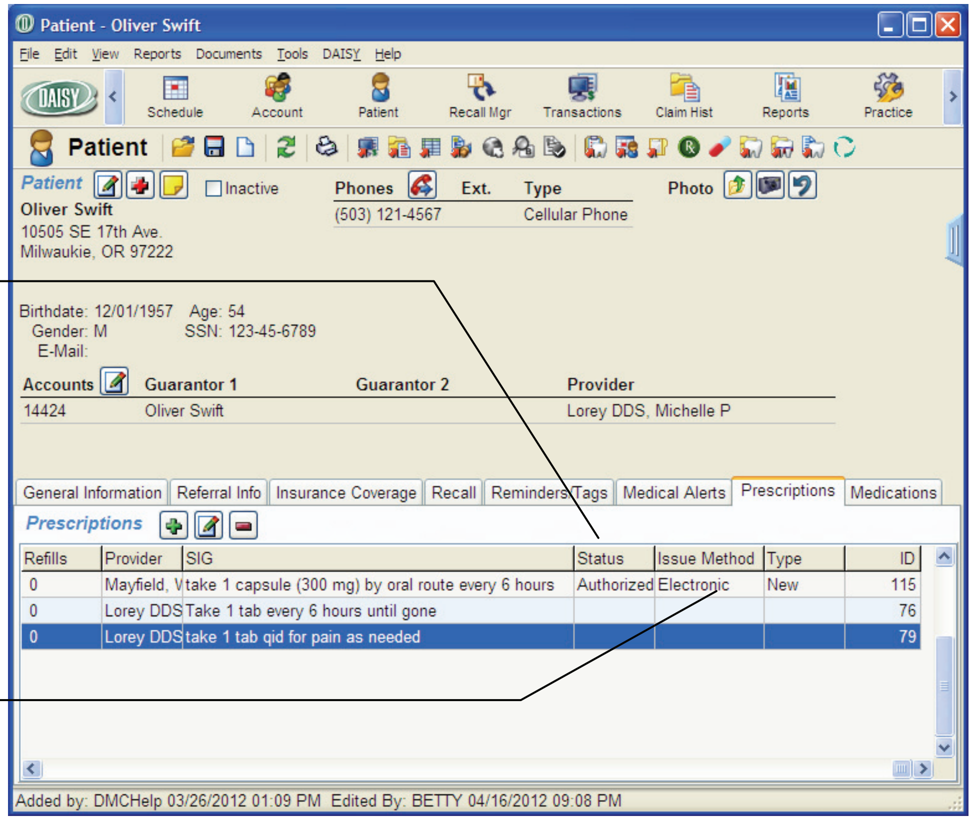
This column shows the amount of medication dispensed



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

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

This column shows the current status of an e-prescription



This column shows how the prescription was issued

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.

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

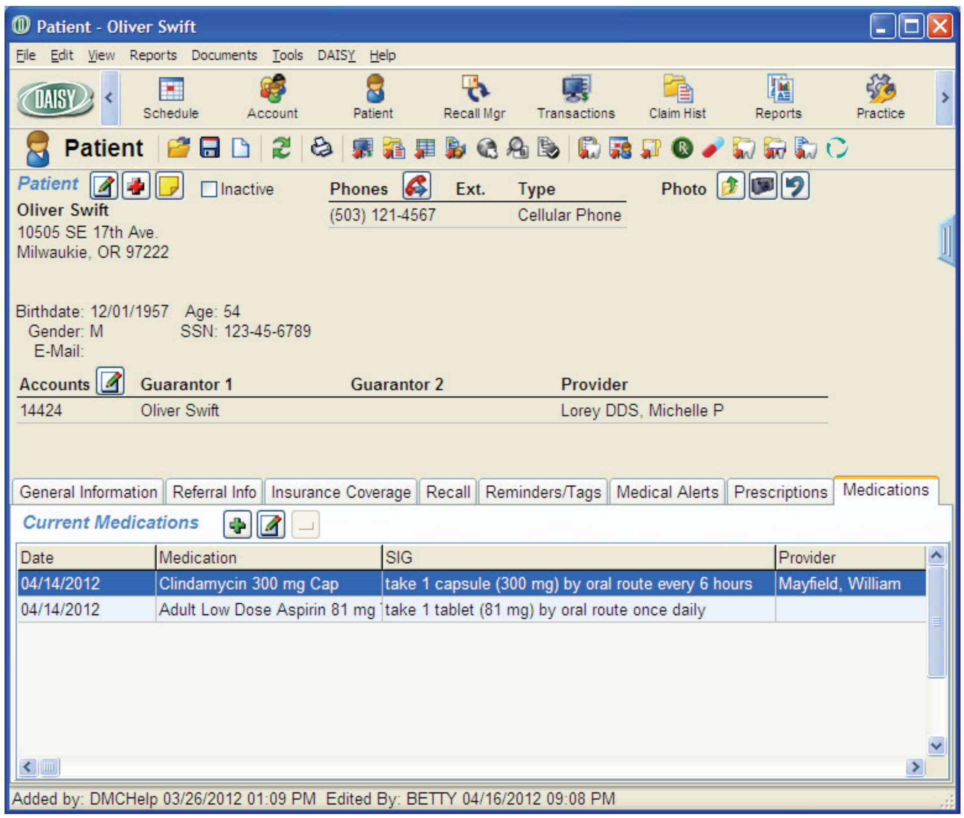
This issue method…	Indicates…
Electronic	The prescription was issued as an e-prescription and sent directly to the patient's pharmacy.
Electronic/Print	The prescription was issued as an e-prescription and printed in the dental office.
Hand Written	The prescription was written on a prescription pad and 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 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.

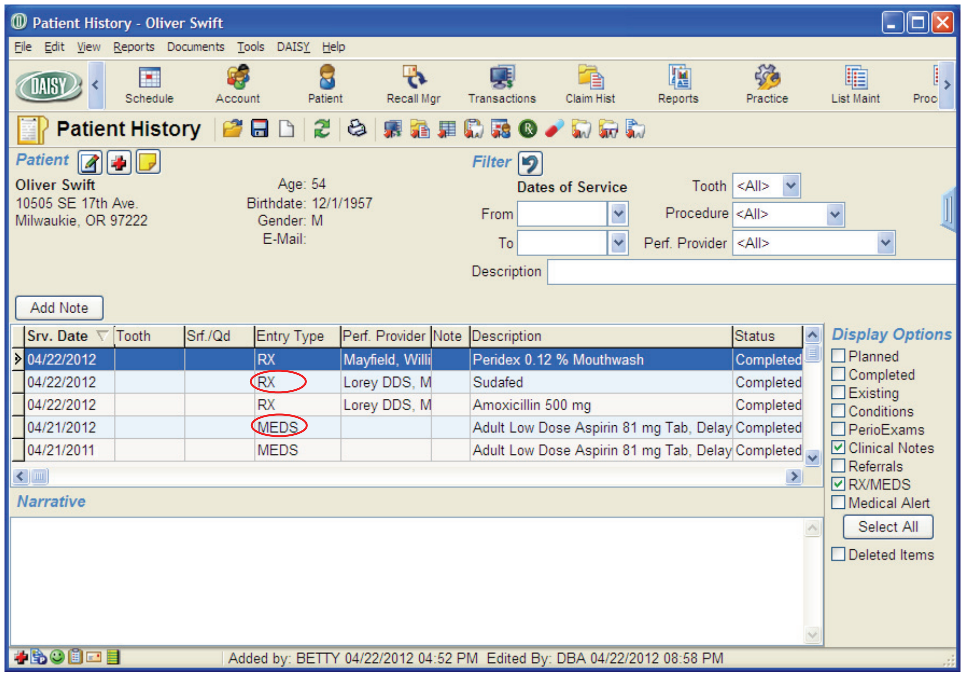
If a days supply has been specified for the medication and the supply has lapsed, DAISY automatically removes the medication from this tab.



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.



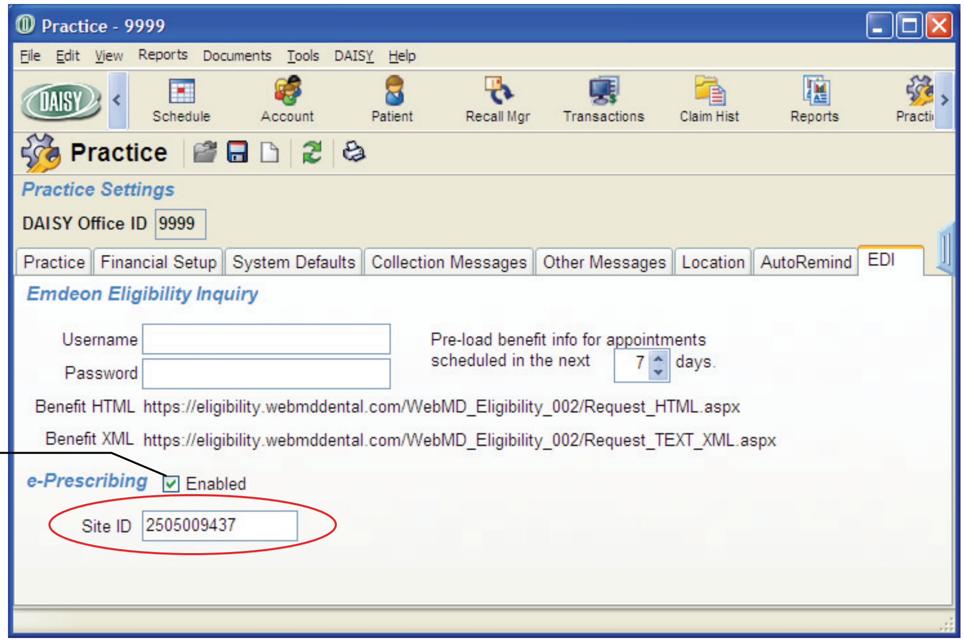
Enable electronic prescribing in DAISY

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.



Use this check box to enable and disable e-prescribing

◆ **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.

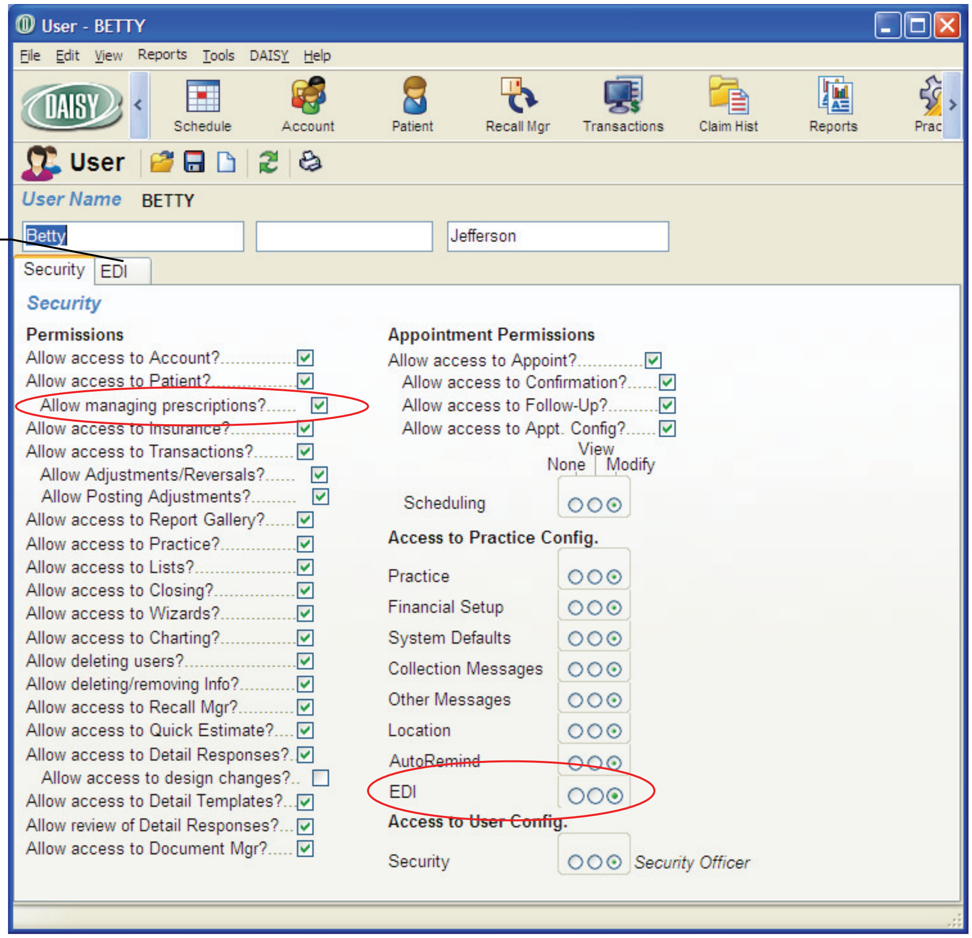
Note. Starting with DAISY 4.2, user accounts are managed from a new User window. For more information, see “Manage user accounts” on page 65.

◆ **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.

Click the EDI tab to view your DAISY eRx username and password from Emdeon



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.

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5. To allow the user to enable or disable DAISY eRx for the practice, change the EDI setting to Modify.

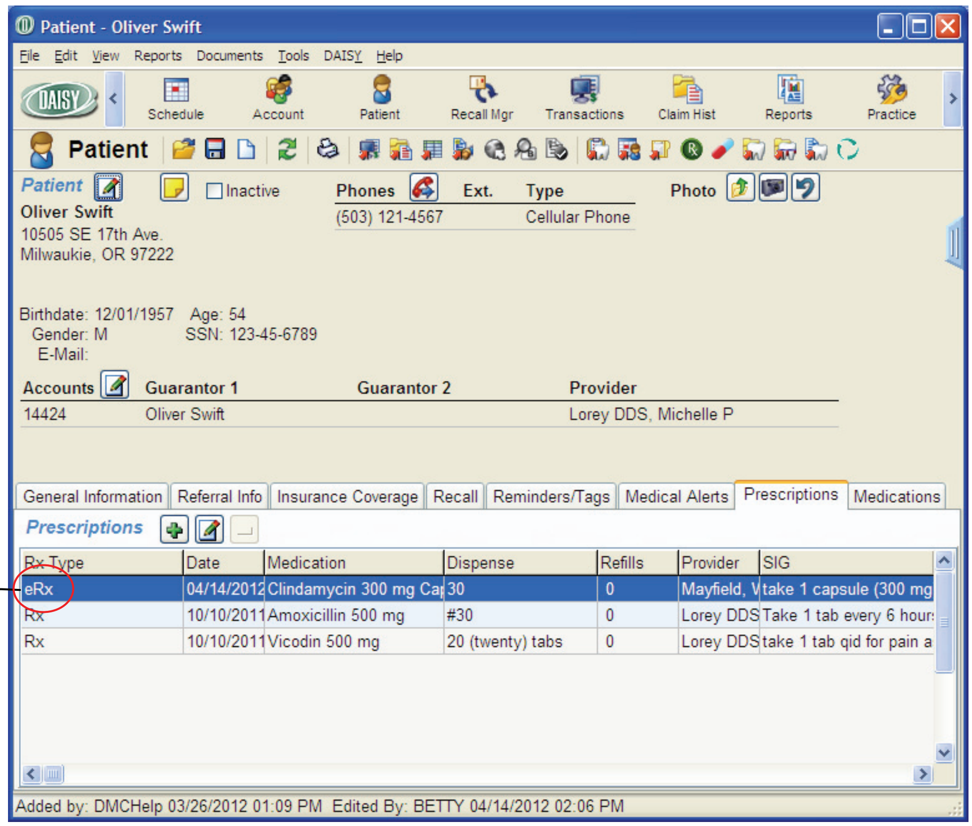
6. Click  **, then close the window.**

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.**



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

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.

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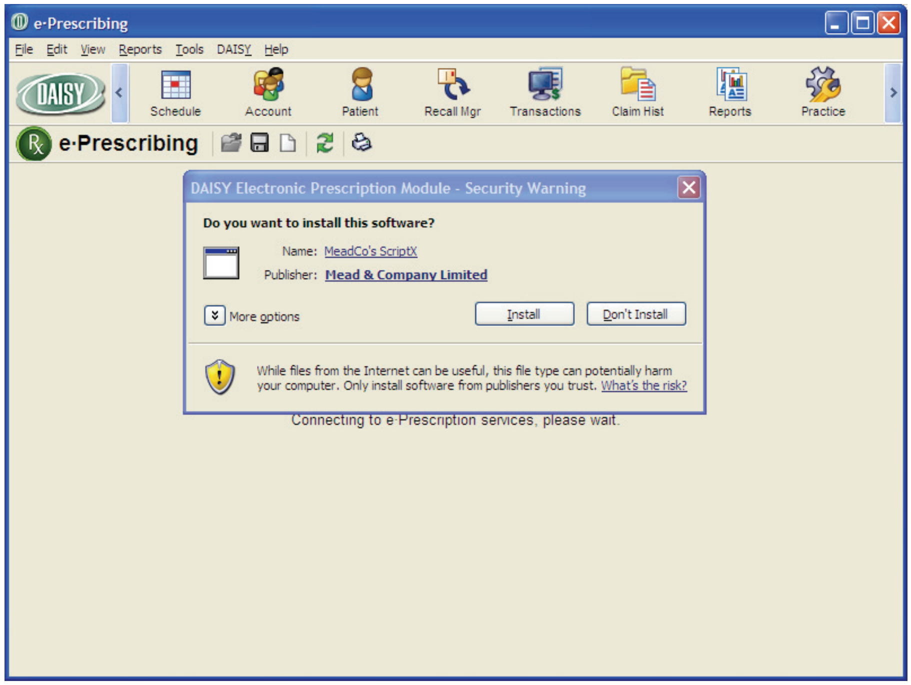
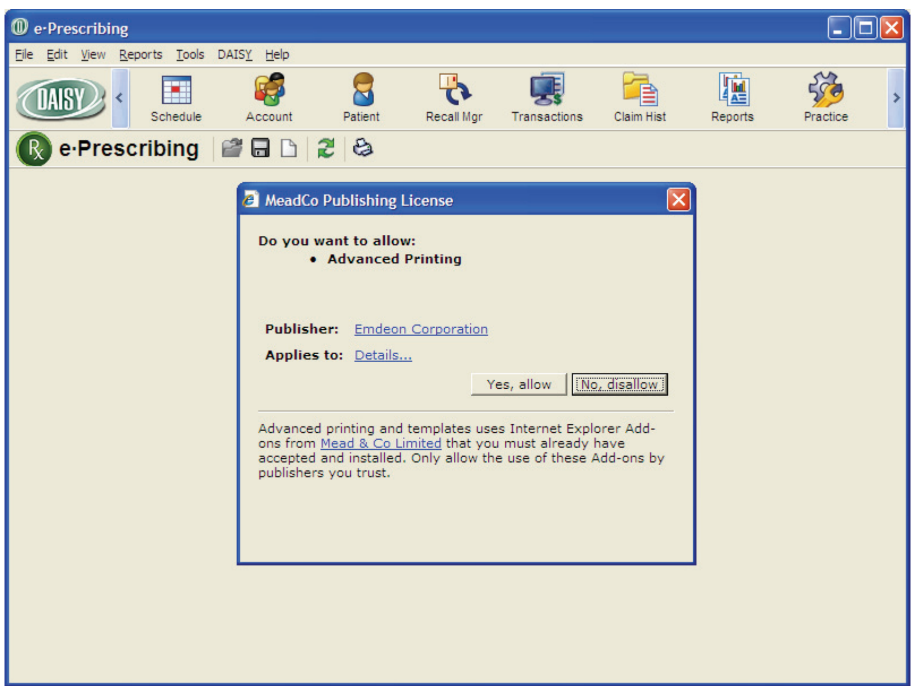
4. **In the Quick Access toolbar, click .**

   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.

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.

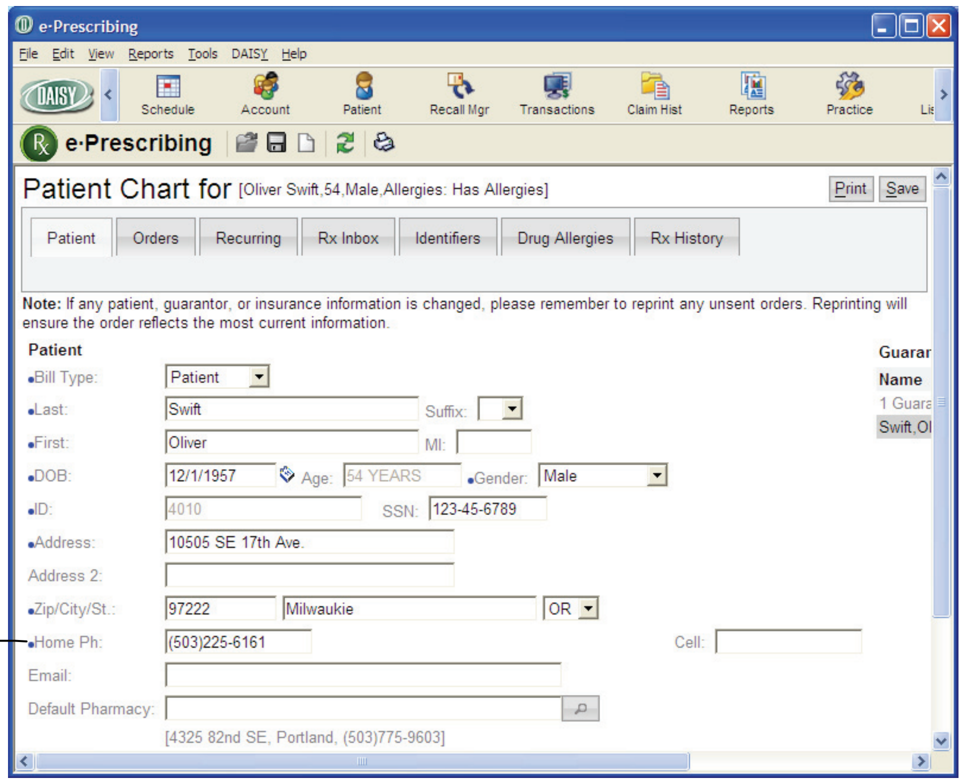
Add patient chart information

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.**



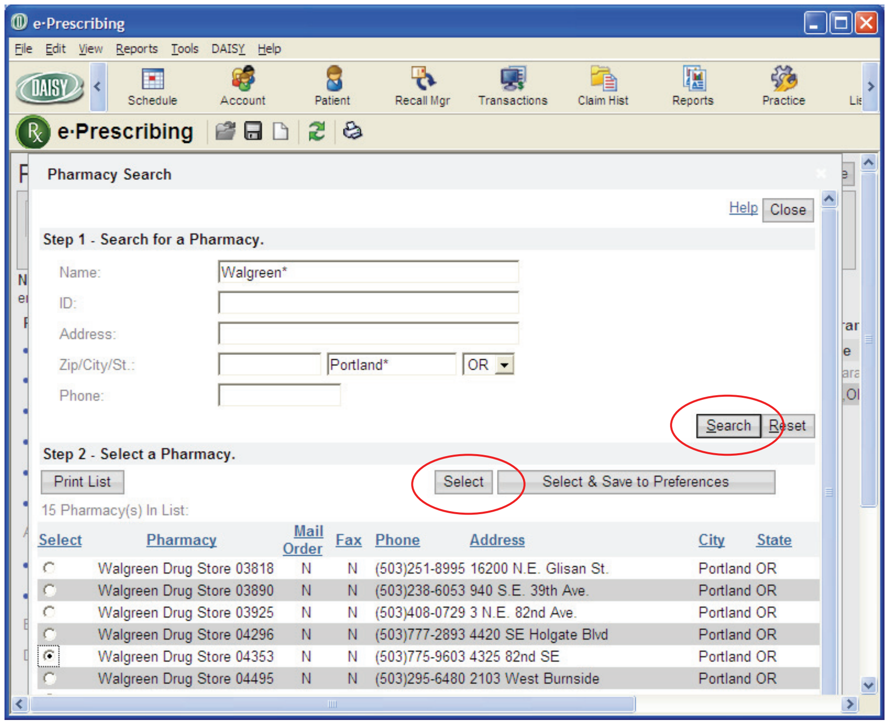
Type the patient's phone number here

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

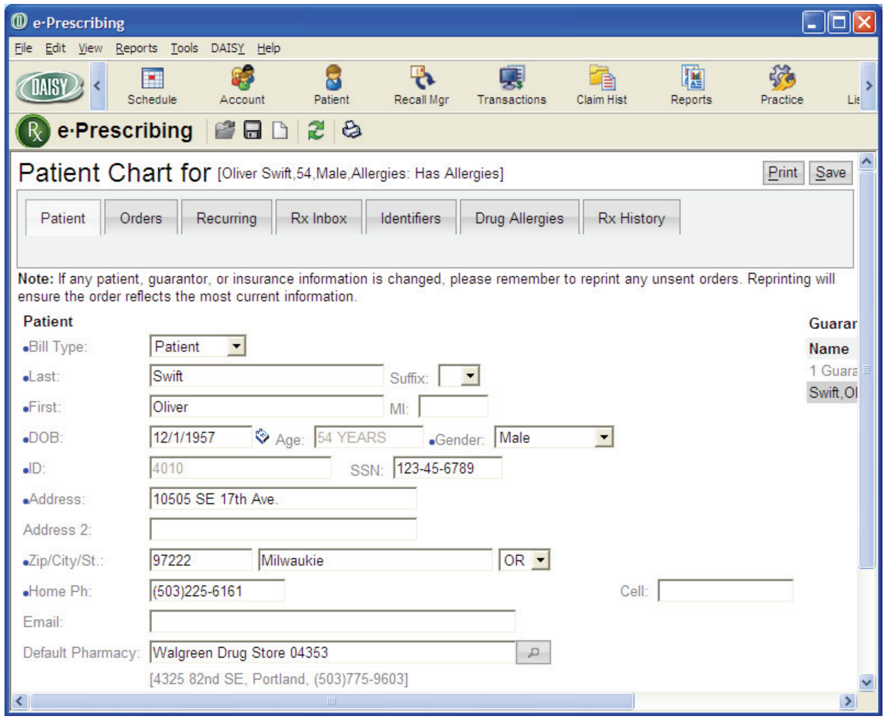
3. **In the Step 1 – Search for a Pharmacy section, type the pharmacy information, then click Search.**
4. **In the Step 2 – Select a Pharmacy section, choose the pharmacy, then click Select.**

Search for the pharmacy here, then click Search

Choose the pharmacy here, then click Select



The pharmacy is added to the patient chart.



The patient's pharmacy is added here

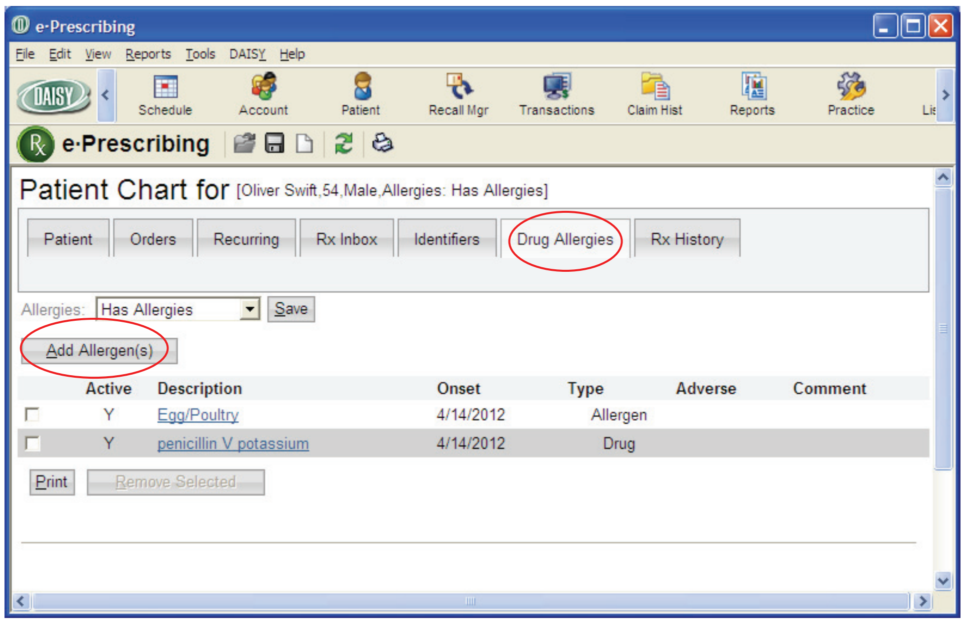
5. **Click Save to save the patient chart.**

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.

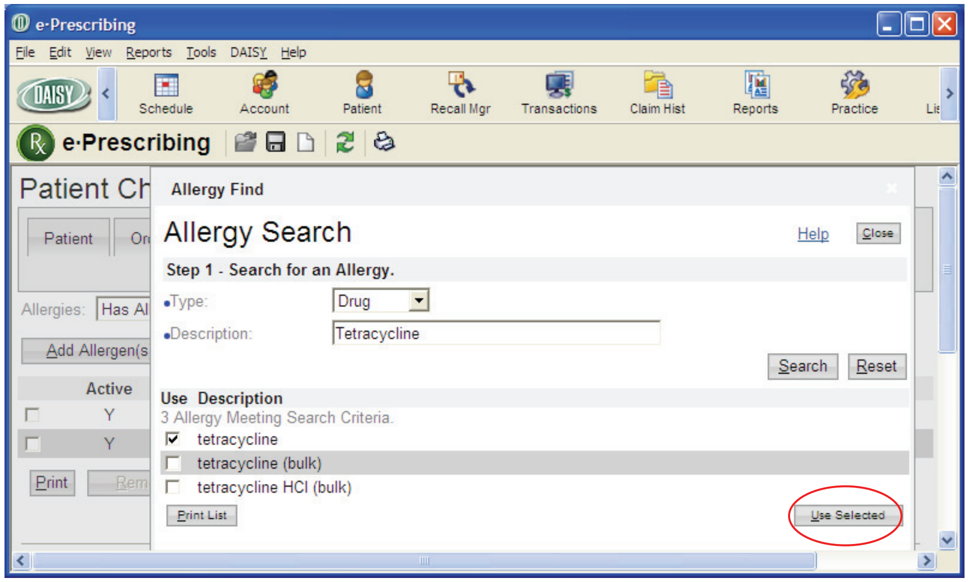
◆ **To add drug allergies:**

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.**



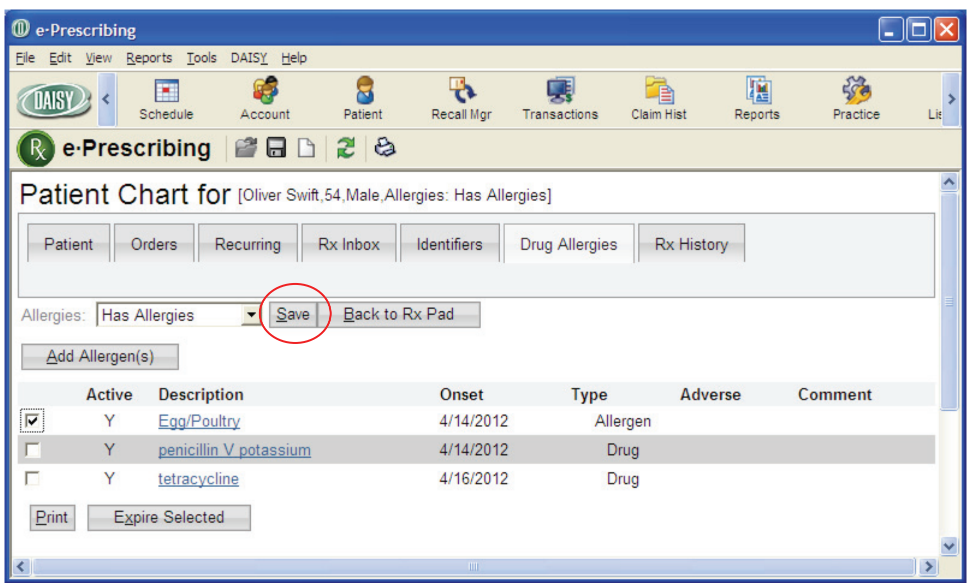
4. **In the Type drop-down list, select the type of allergen.**
5. **In the Description, type the allergen, then click Search.**

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



7. **Click Save.**

The allergen is added to the patient chart.



To delete an allergen, check the check box next to the item, then click Expire Selected

Manage prescription history

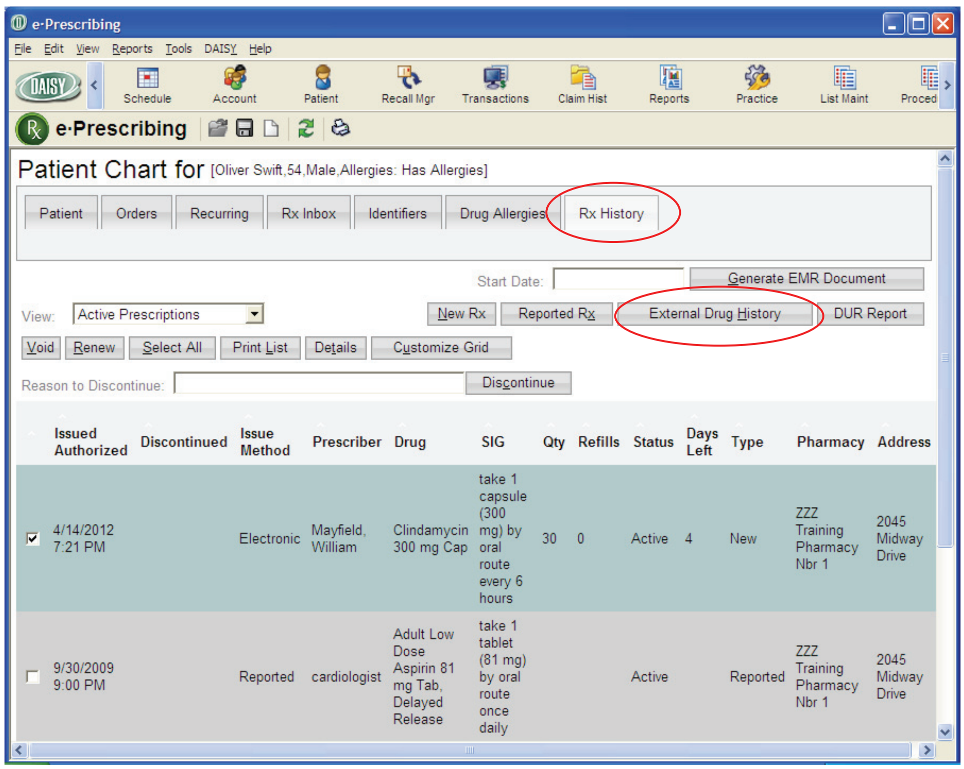
With DAISY eRx, you can:

- 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.



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.

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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.

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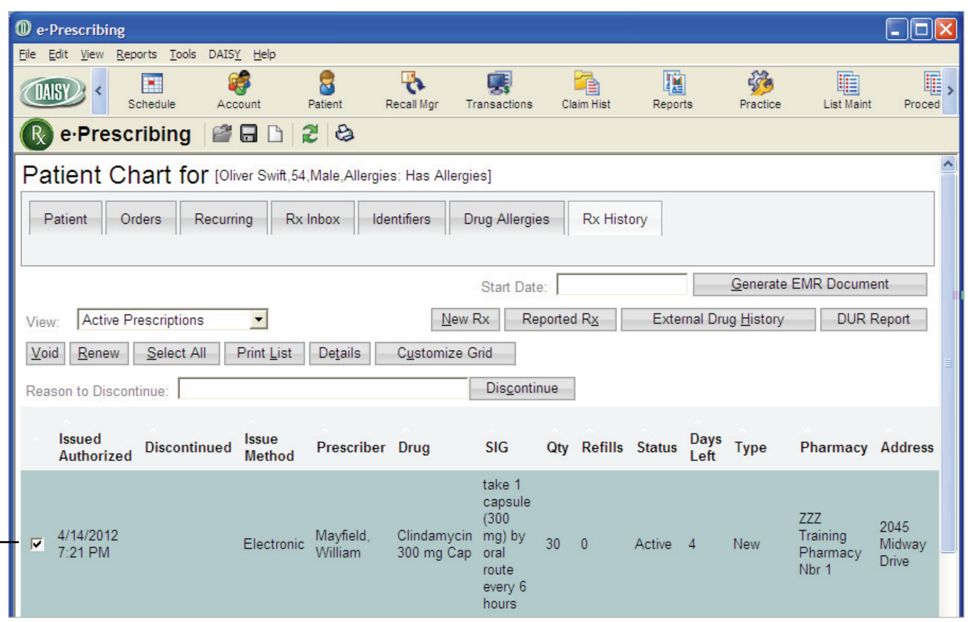
4. **Click Close.**

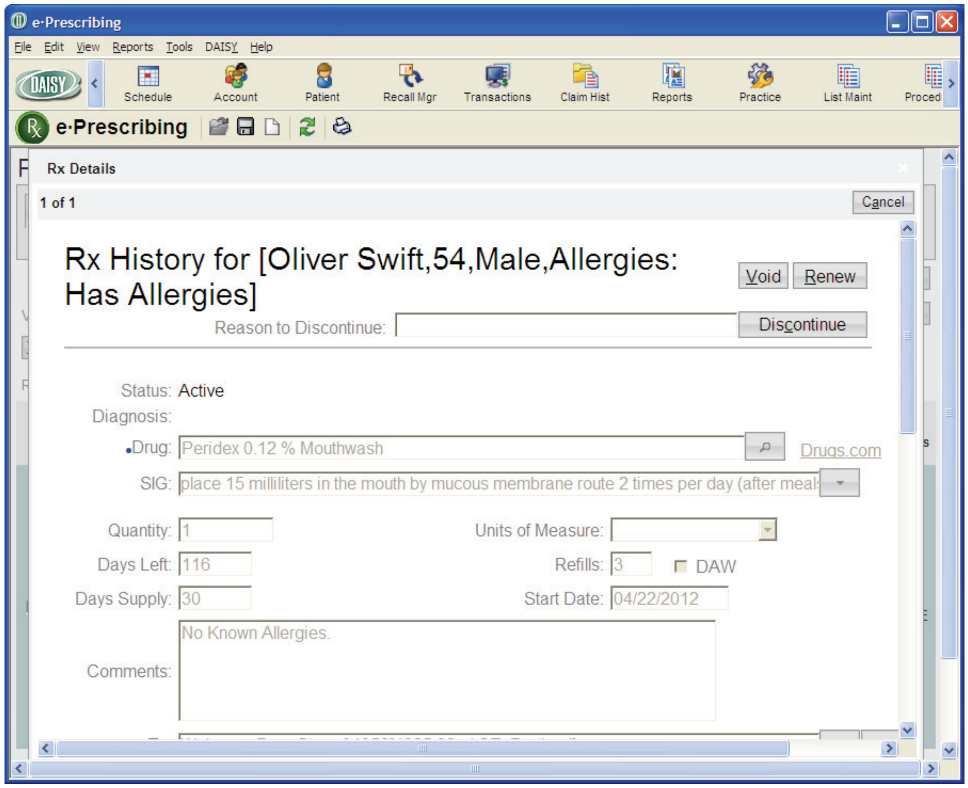
   You see the Patient Chart window.

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.



To view a prescription’s details, check here 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.

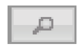


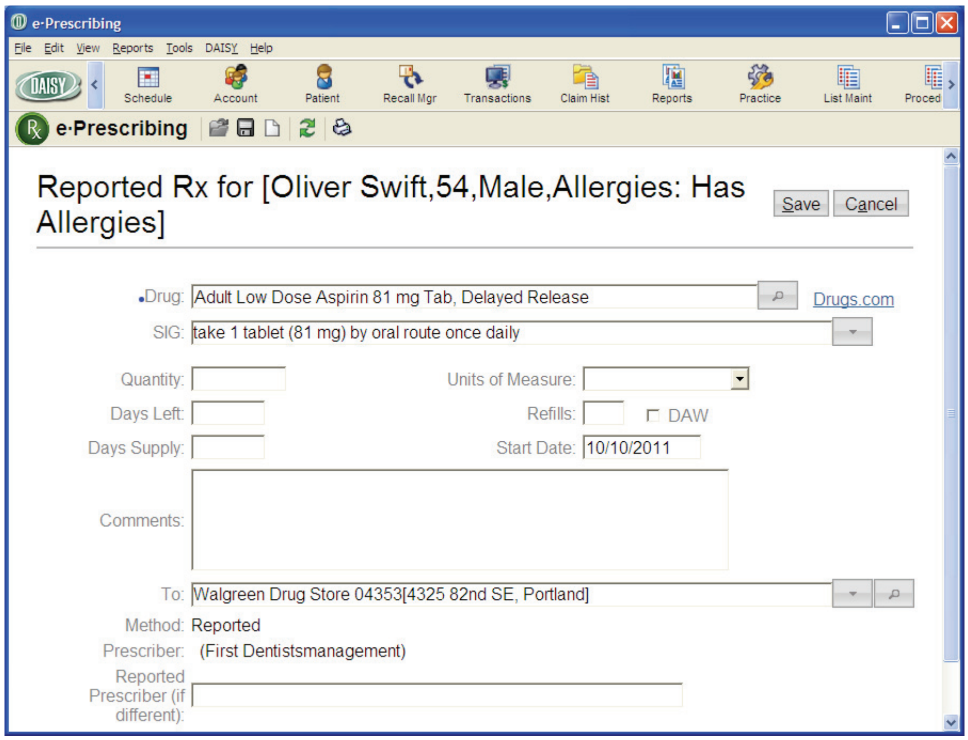
6. Click Cancel to return to the eRx Patient Chart window.

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**  **to open the Drug Search window.**



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.

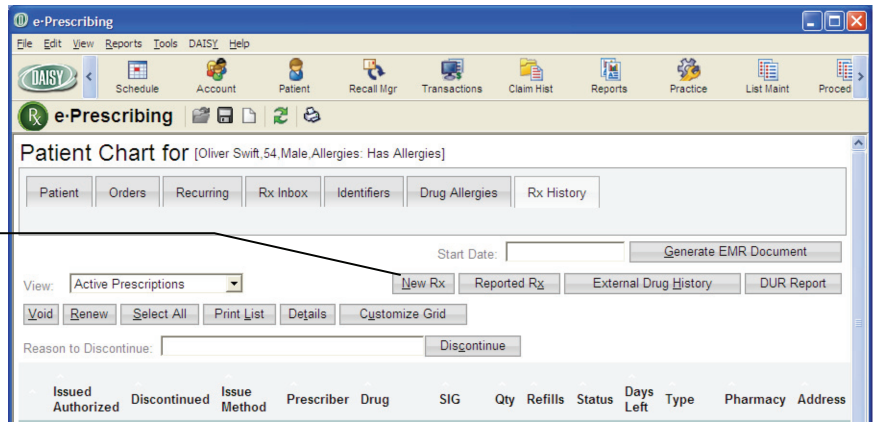
Add a prescription

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.**

Click here to add a prescription

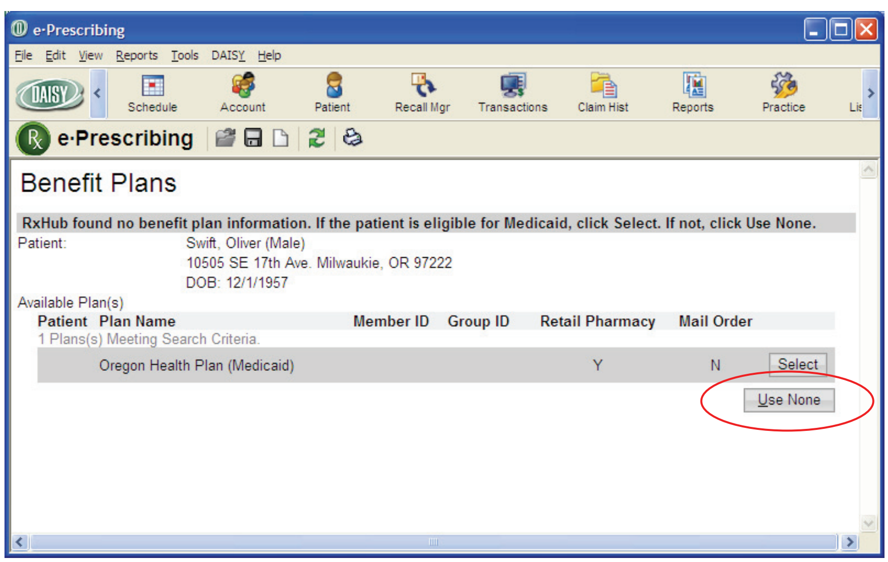


You see the e-Prescribing Benefit Plans window.

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.



You see the Rx Pad window for the patient.

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

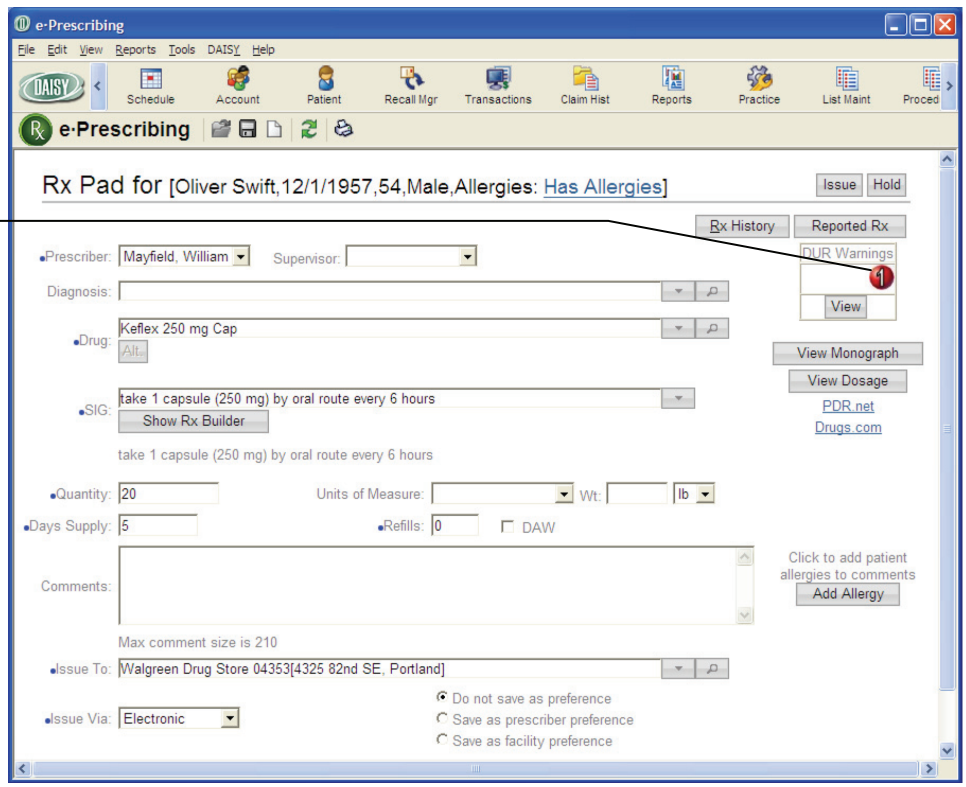
Note. You must select a prescriber before you can enter other prescription information.

---

4. **Next to the Drug text box, click 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.

DAISY eRx automatically issues a Drug Utilization Review (DUR) warning when appropriate



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.**

10. **In the Issue To drop-down list, select the receiving pharmacy for this e-prescription.**

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

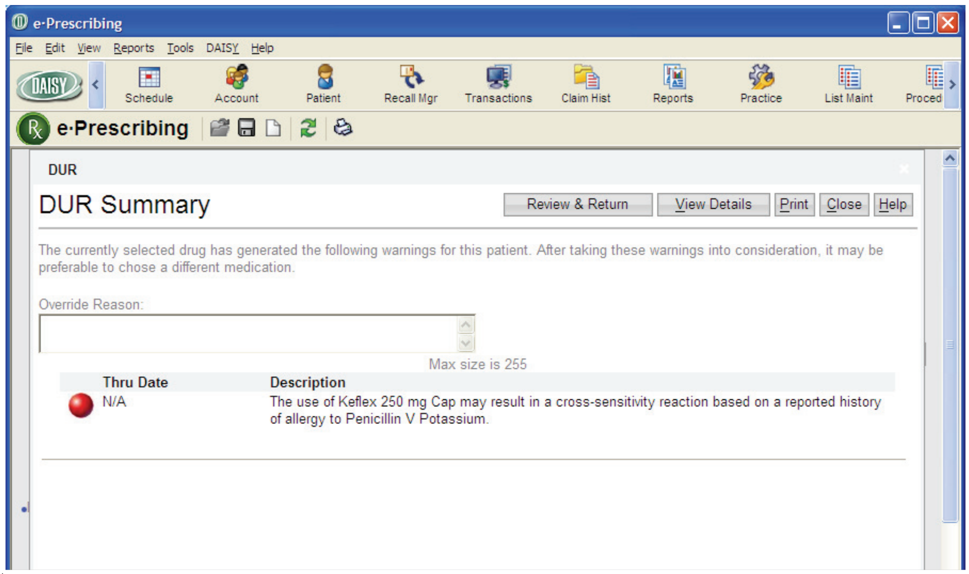
---

11. **In the Issue Via drop-down list, select from the following options:**

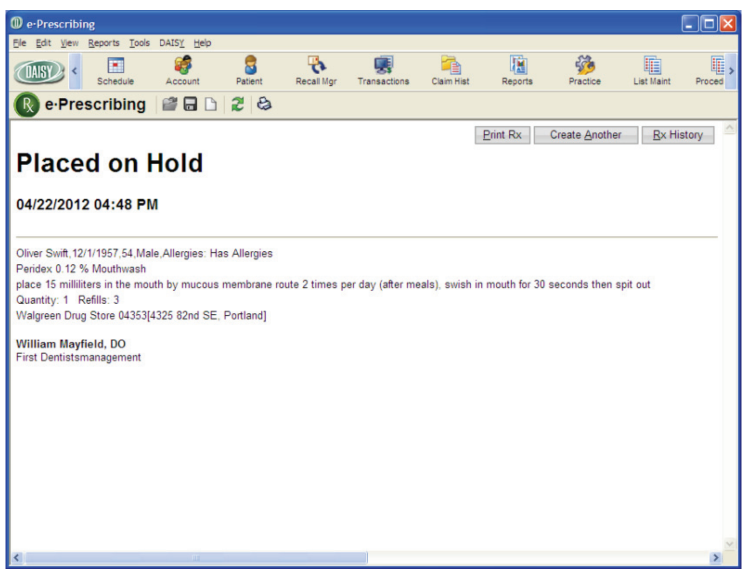
Use this Issue Via option…	When you…
Electronic	Send an e-prescription directly to the pharmacy.
Electronic/Print	Send an e-prescription directly to the pharmacy and print a copy for your records.
Hand Written	Issue a paper prescription in the office. This prevents DAISY eRx from sending the prescription 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.

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.



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.

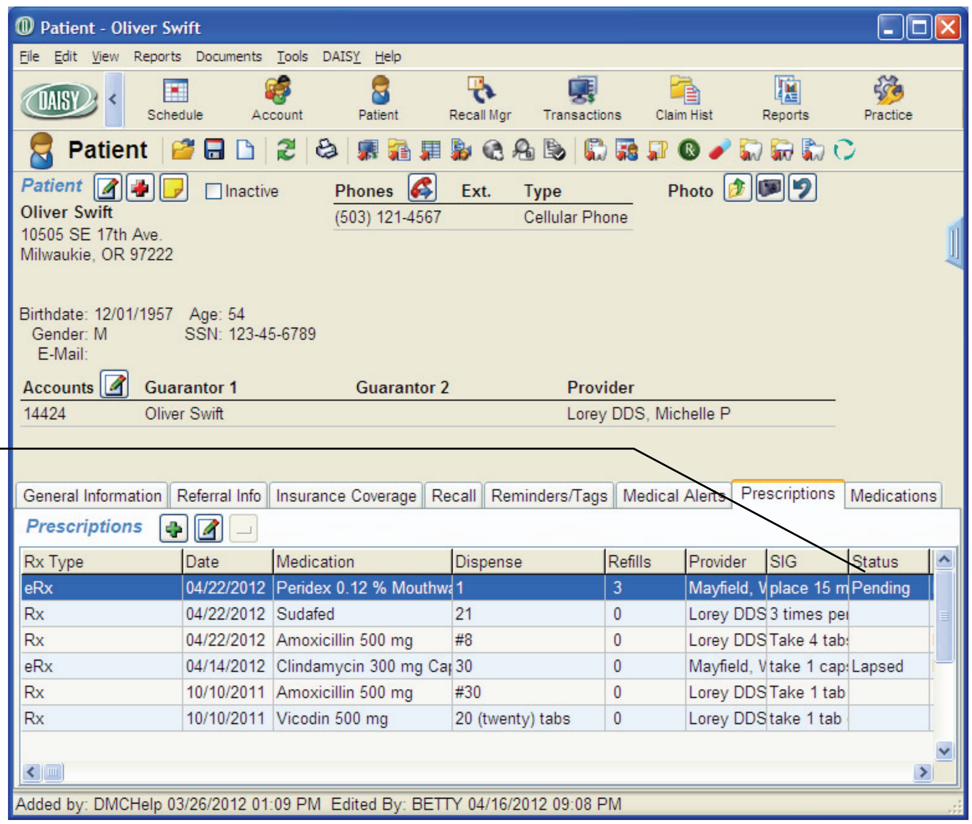
Authorize a pending prescription

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.

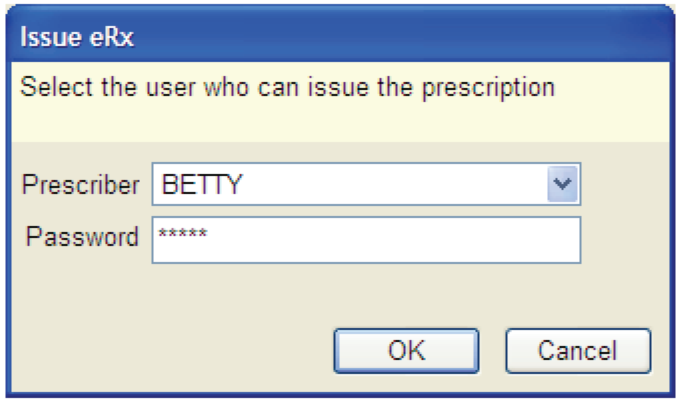
A prescription on hold in Clinician shows a status of Pending here



◆ **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.

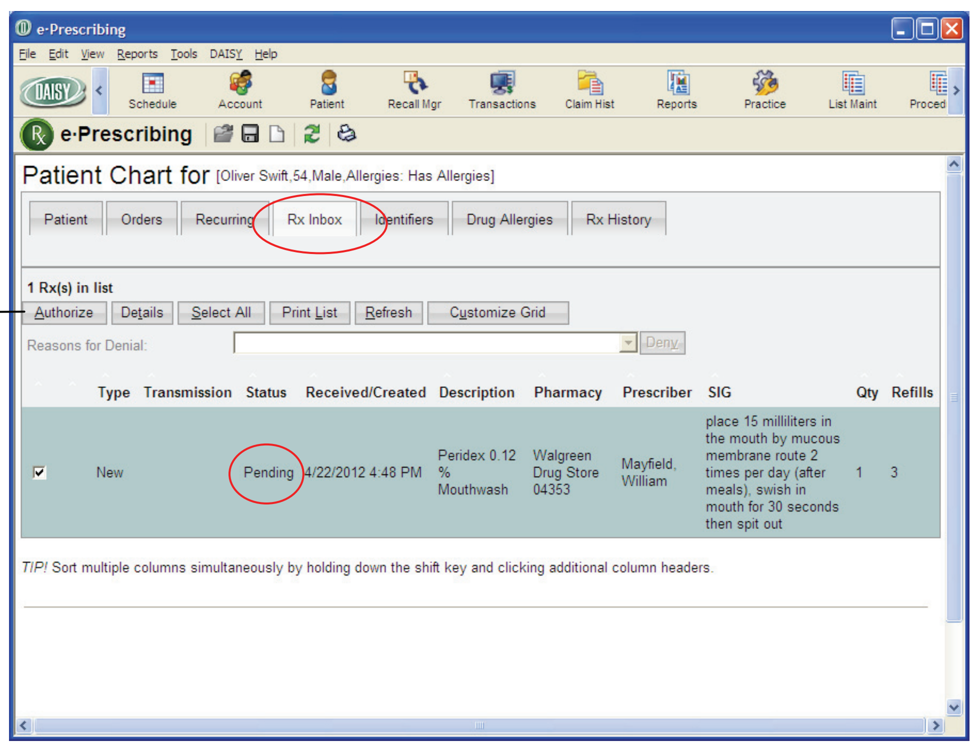


6. **In the Prescriber drop-down list, select the user who can issue the prescription.**
7. **In the Password text box, type the password for this DAISY user, then click OK.**

   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.**

Click here to issue the pending prescription



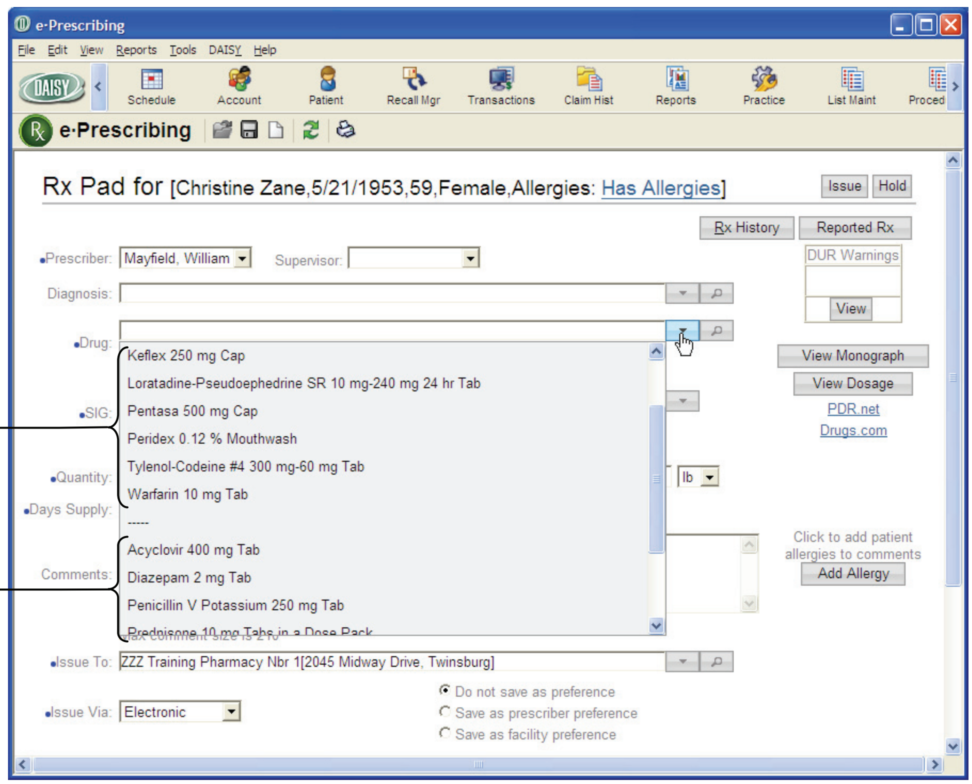
Create a list of drug and SIG preferences

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.

Prescriber preferences appear above the line

Facility preferences appear below the line



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:**

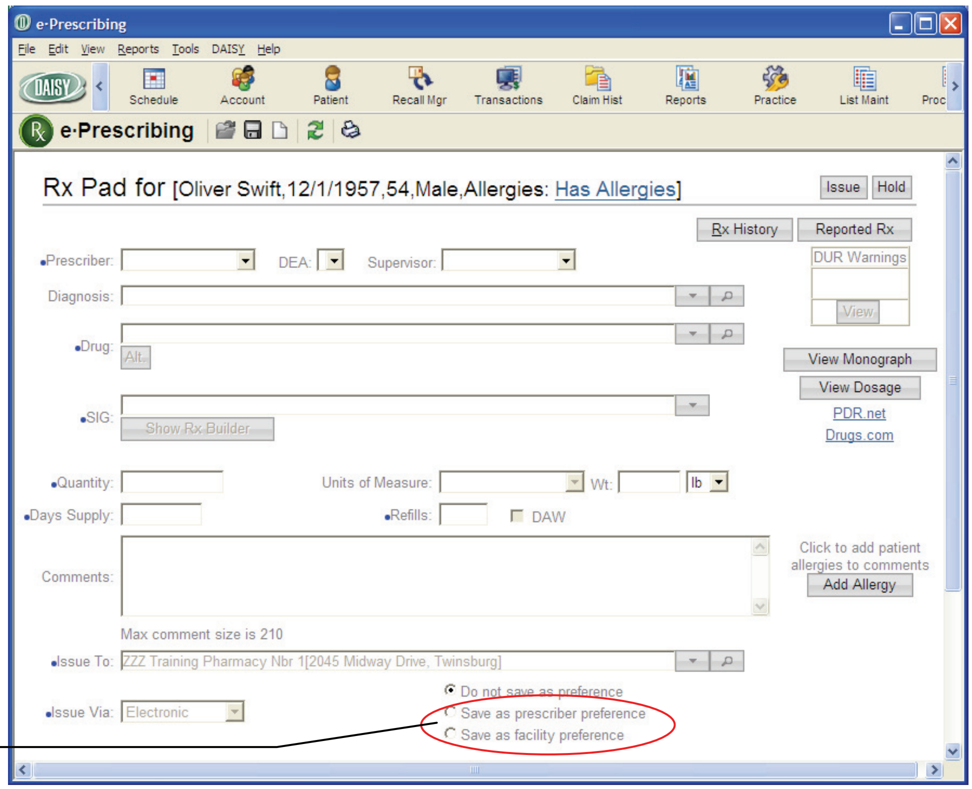
1. **From the DAISY toolbar, click [Patient icon].**
2. **Search for and select the patient, then click OK.**
3. **In the Quick Access toolbar, click [refresh icon] to open the eRx Patient Chart window.**
4. **In the eRx Patient Chart window, click the Rx History tab.**
5. **Click New Rx.**

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.



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

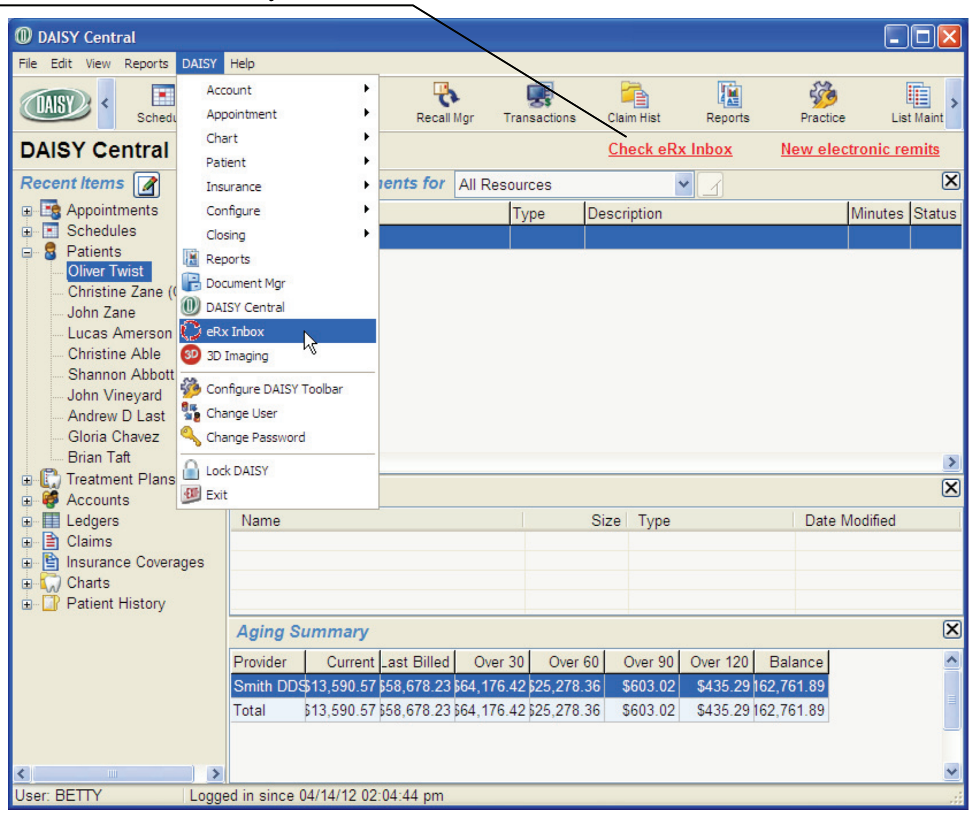
DAISY automatically updates eRx status information every 10 minutes.

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.

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



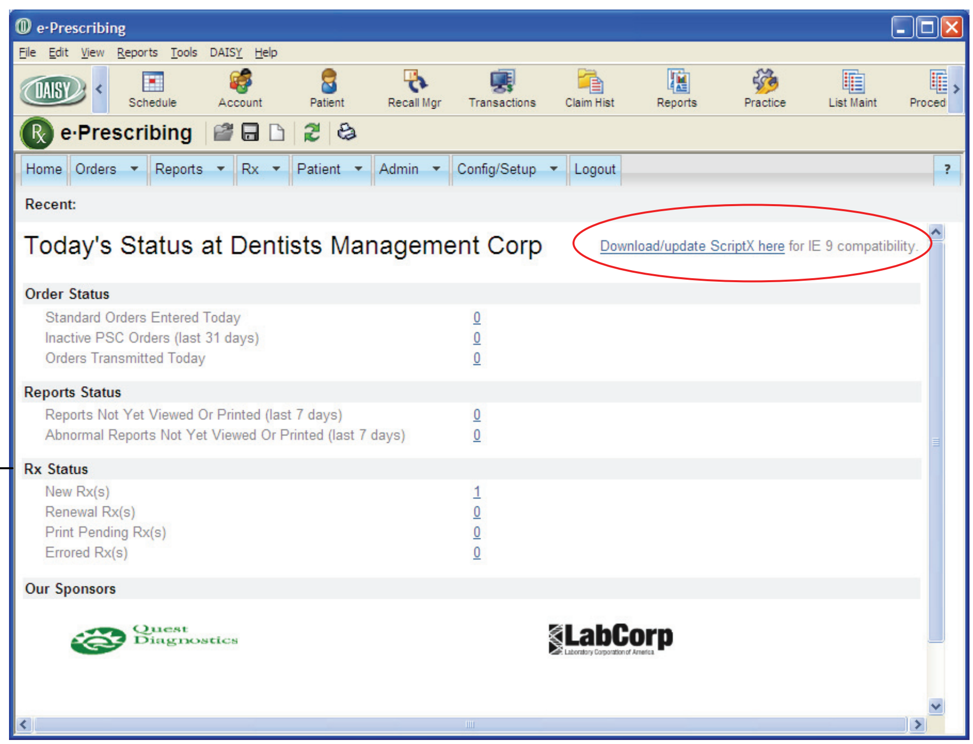
Note. You can also add an eRx Inbox button ( ) to the DAISY toolbar. If the eRx Inbox has at least one pending item, the icon is red; otherwise it is green.

---

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

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.



Information in this section applies to DAISY eRx

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.

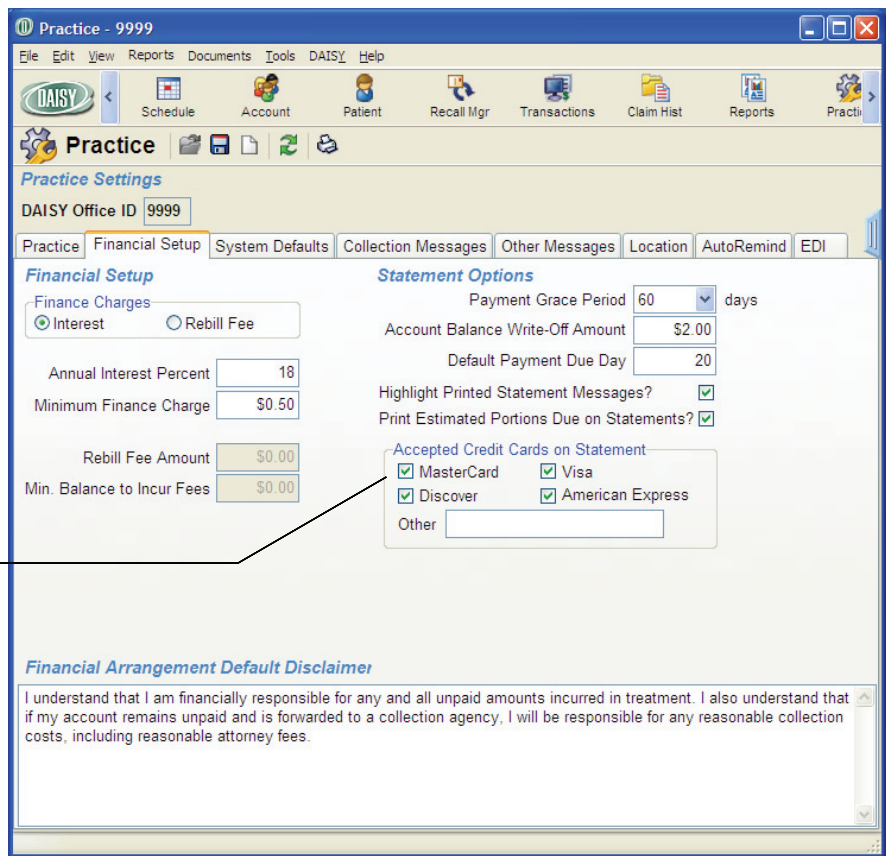
Note. A DAISY representative will help you set up this connection.

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.**



Select each credit card type that TransFirst will process

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.**

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 ( ) to the DAISY toolbar.

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.

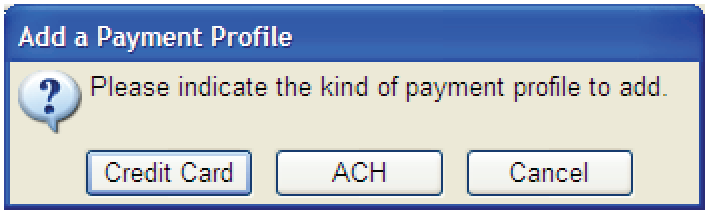
Note. Users must have the "Allow access to Transactions" permission to set up, modify, and delete payment profiles.

Set up a credit card payment profile

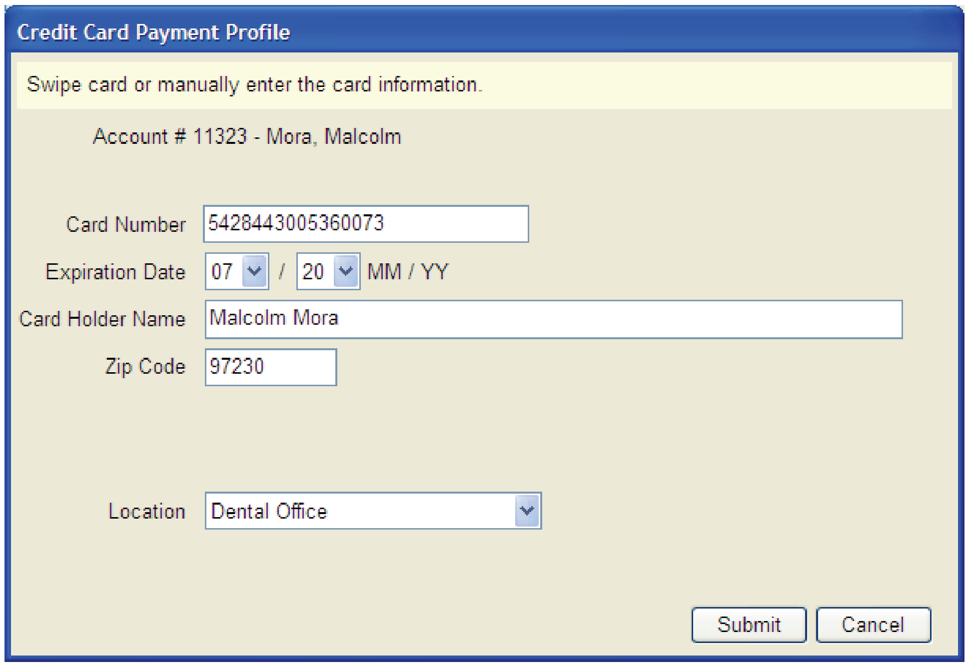
◆ **To set up a credit card payment profile:**

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 .**

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.



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.”

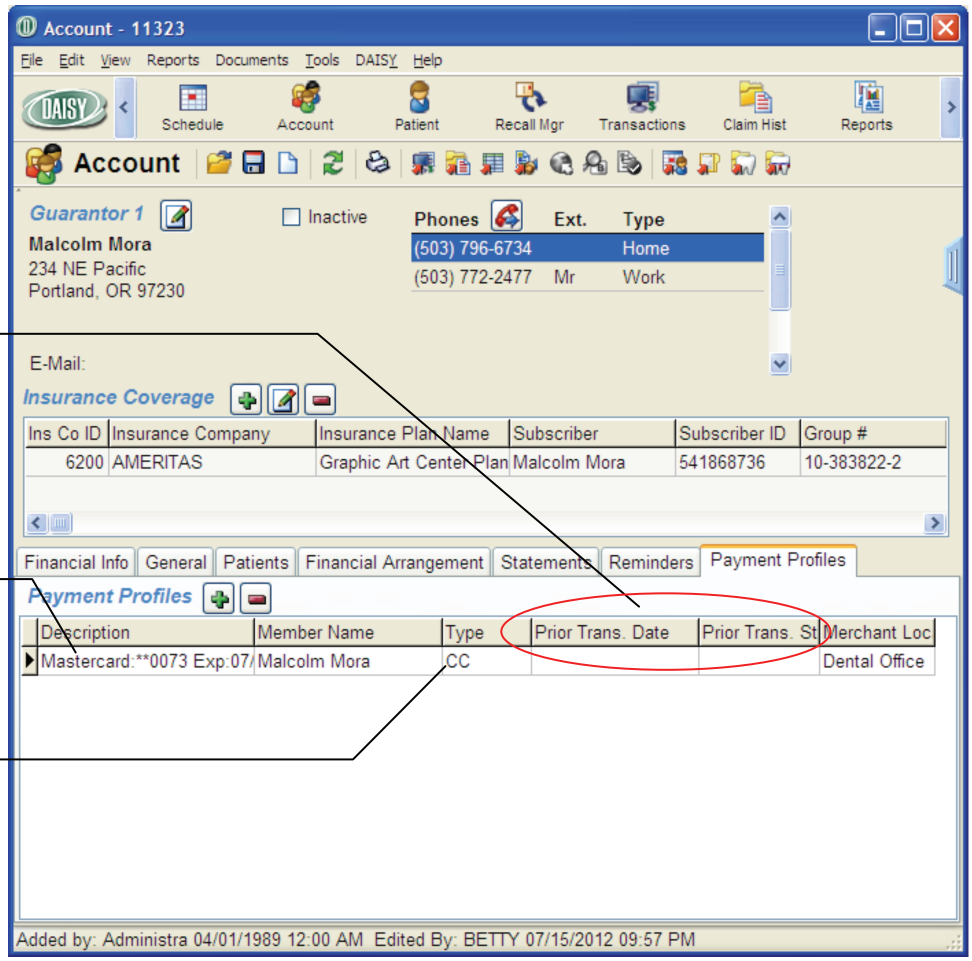
13. Click OK to close the window.

You see the new credit card payment profile.

View the last time that this profile was used for a transaction and the status of that transaction here

In a payment profile, you can edit only the Description column

Indicates that this is a credit card payment profile

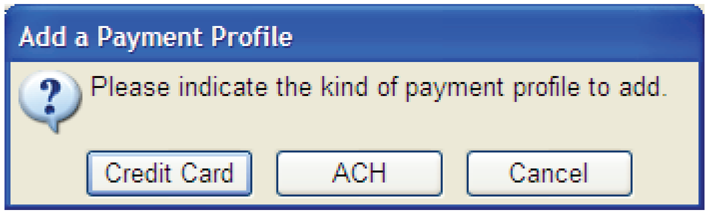


Set up an ACH payment profile

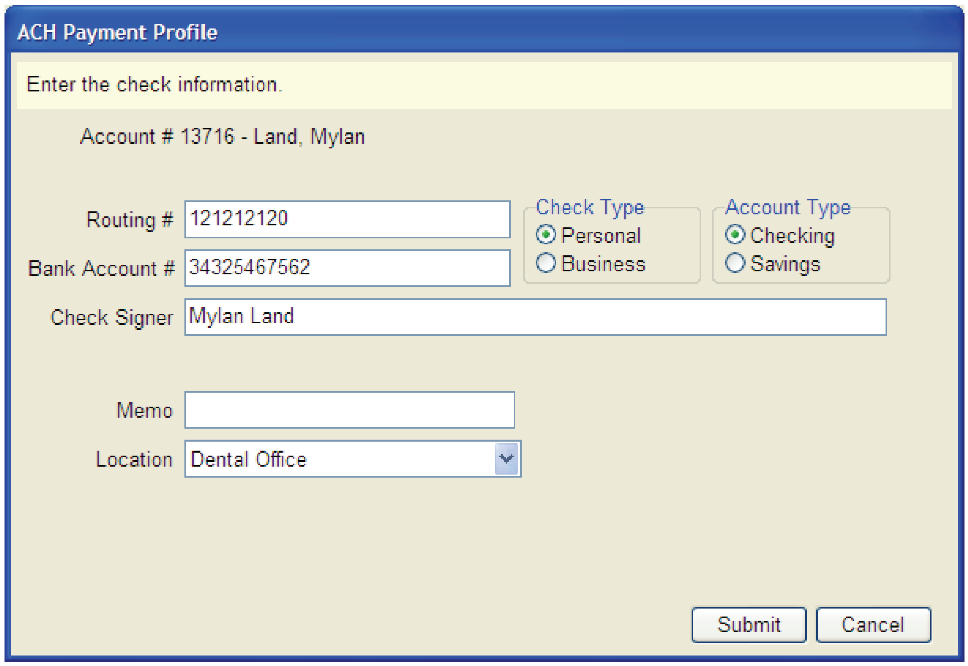
◆ **To set up an ACH payment profile:**

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.**



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.

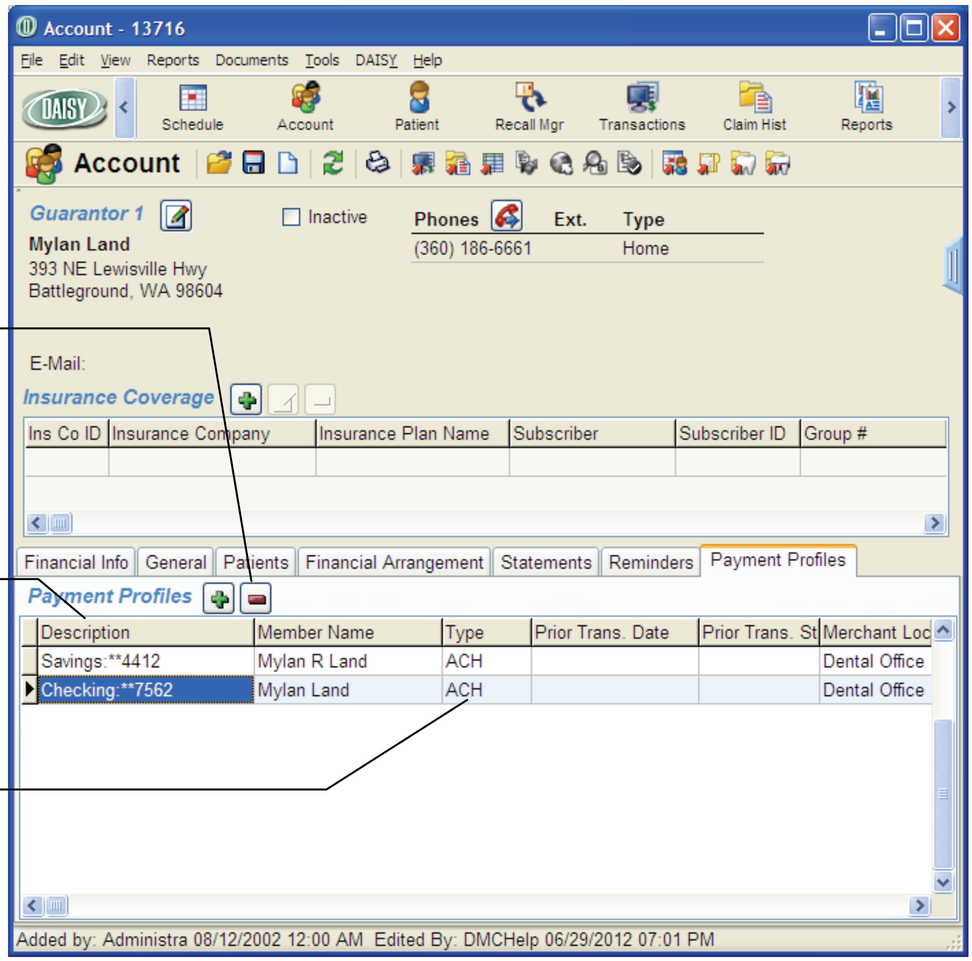
12. **From the Location drop-down list, select the office where the payment is being made.**

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.



To delete a profile, select the profile, then click here

In a payment profile, this column is the only one that can be edited

Indicates that this is an ACH payment profile

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.

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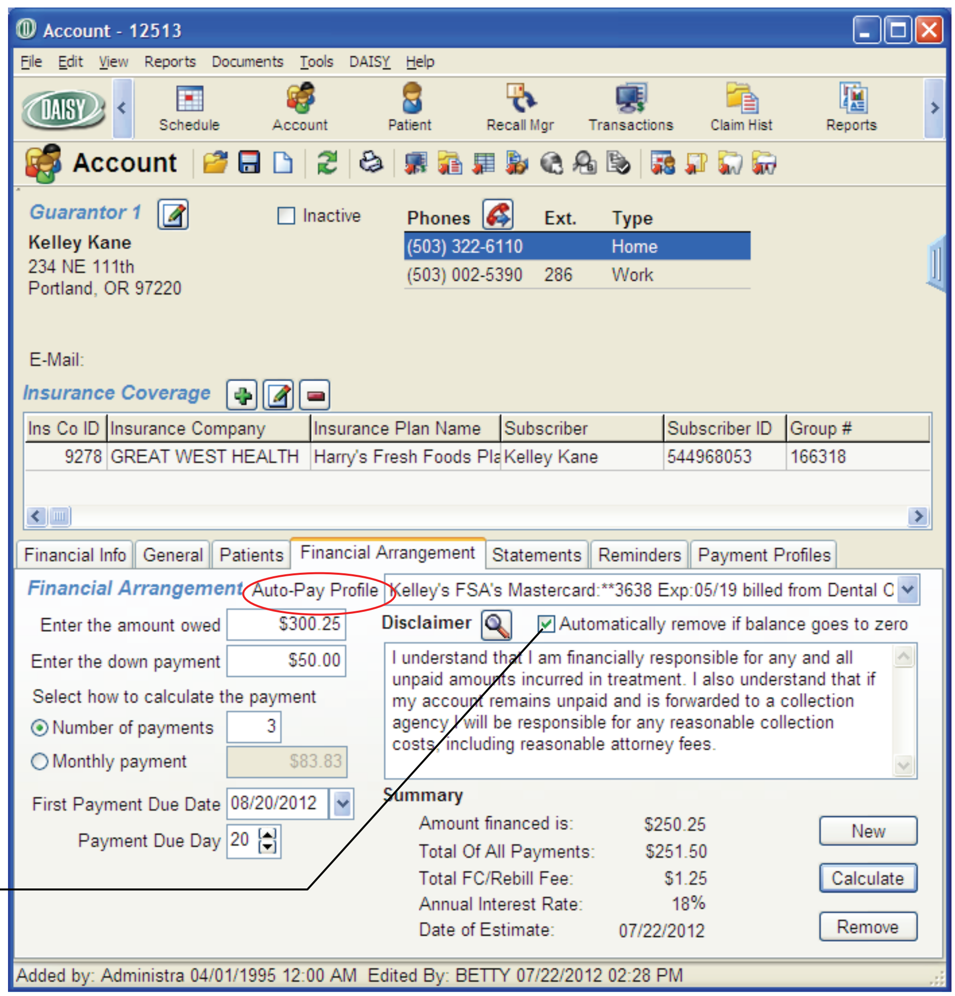
5. **In the Auto-Pay Profile drop-down list, select the payment profile to use for auto-pay.**



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 auto-pay 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

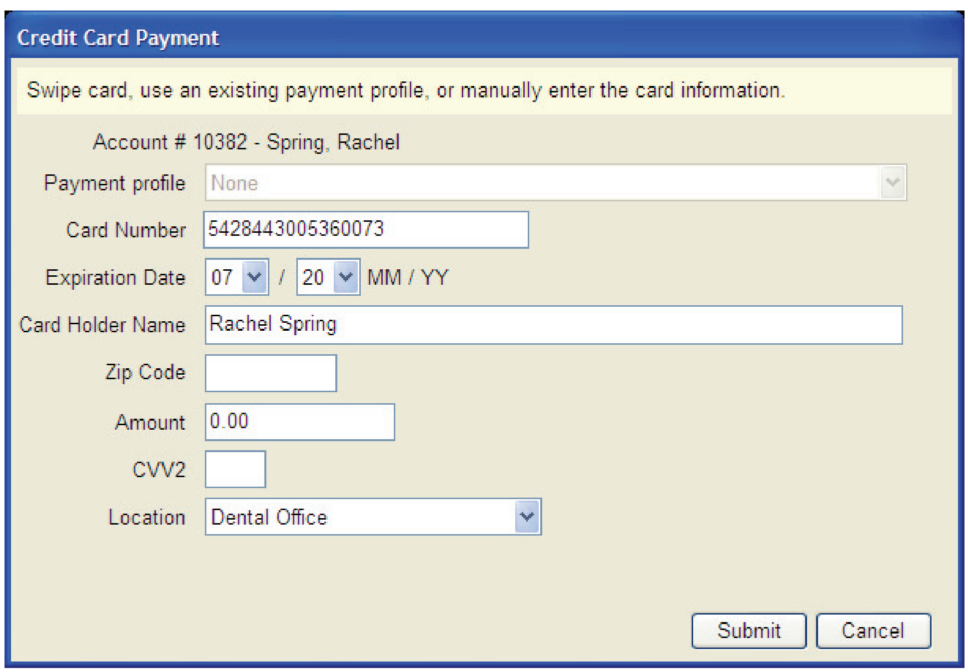
You enter the payment either by swiping the credit card through a credit card reader connected to your computer, by typing in the credit card information, or by selecting a payment profile.

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.



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.**

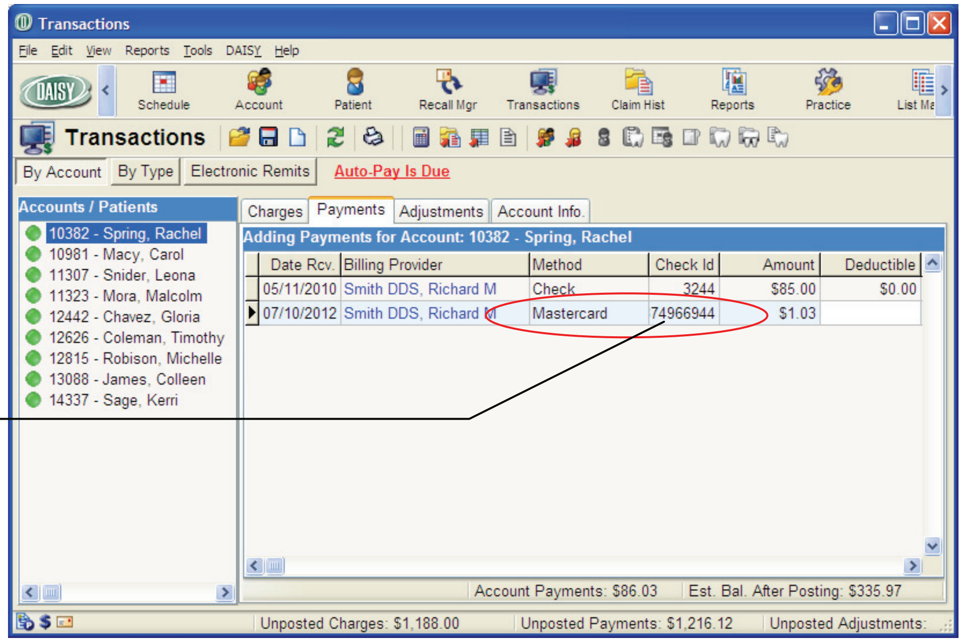
    Note. DAISY defaults to this location the next time you make a payment.

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.

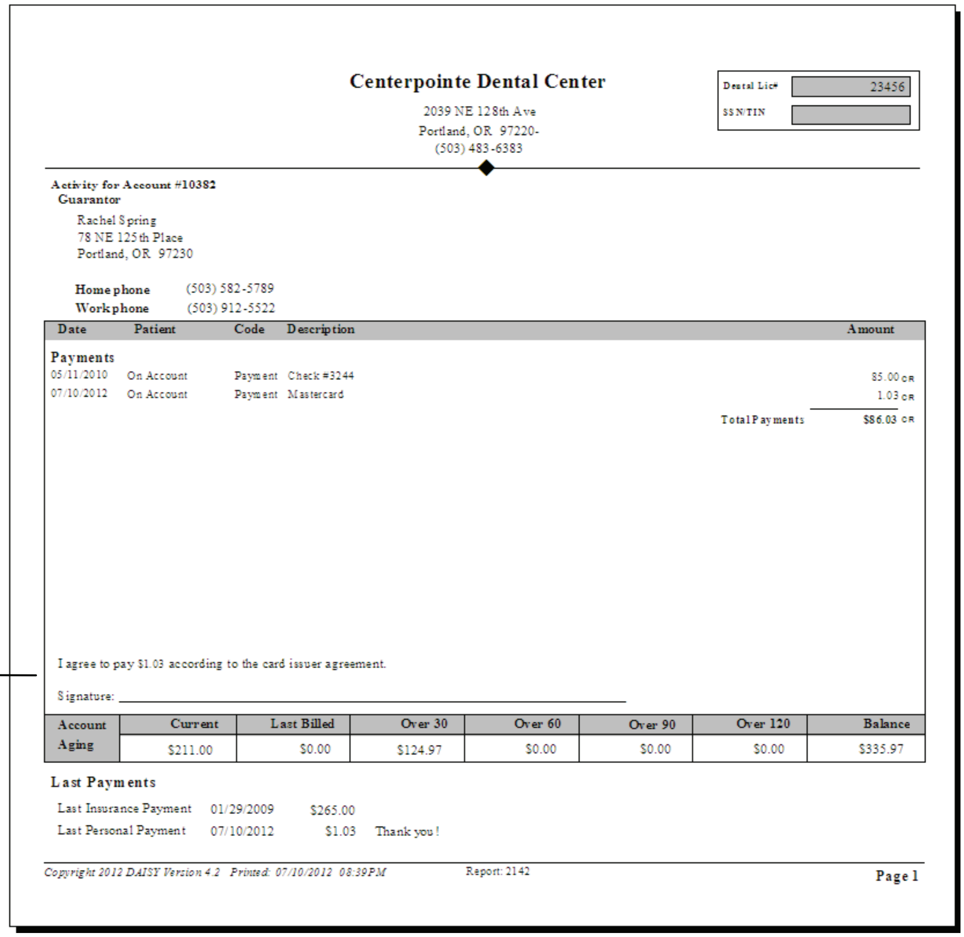


The transaction reference number displays here

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.



Centerpointe Dental Center
2039 NE 128th Ave
Portland, OR 97220-
(503) 483-6383

Dental Lic#	23456
SSN/TIN	

Activity for Account #10382
Guarantor
Rachel Spring
78 NE 125th Place
Portland, OR 97230

Home phone (503) 582-5789
Work phone (503) 912-5522

Date	Patient	Code	Description	Amount
Payments				
05/11/2010	On Account	Payment	Check #3244	85.00 CR
07/10/2012	On Account	Payment	Mastercard	1.03 CR
			Total Payments	**$86.03** CR

I agree to pay $1.03 according to the card issuer agreement.

Signature: ______________________________

Account Aging	Current	Last Billed	Over 30	Over 60	Over 90	Over 120	Balance
	$211.00	$0.00	$124.97	$0.00	$0.00	$0.00	$335.97

Last Payments

Last Insurance Payment	01/29/2009	$265.00	
Last Personal Payment	07/10/2012	$1.03	Thank you!

Copyright 2012 DAISY Version 4.2 Printed: 07/10/2012 08:39PM Report: 2142 **Page 1**

Visit summary reports now have a credit card statement of responsibility and signature line

◆ **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

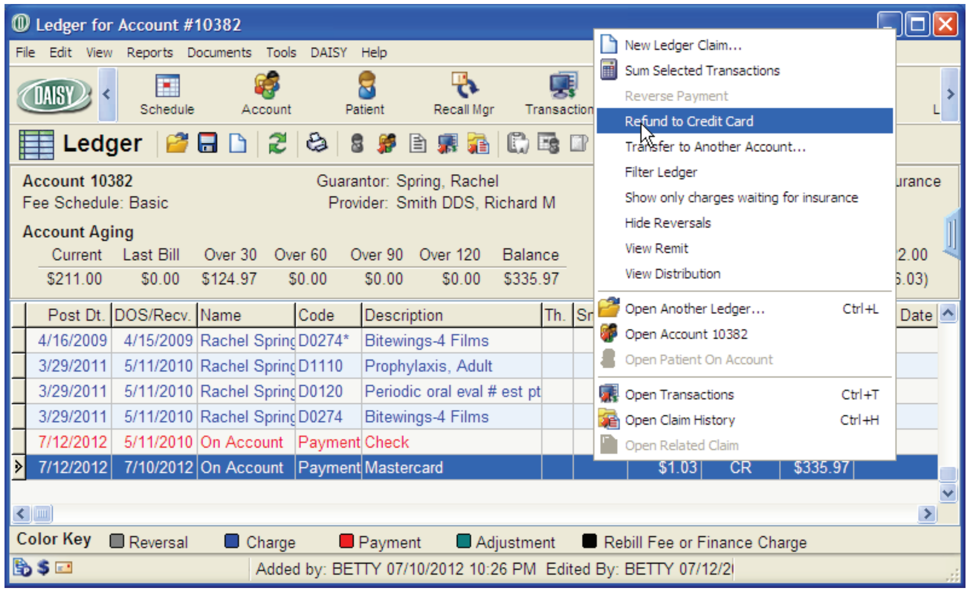
Credit card refunds are issued to the cardholder who made the original payment.

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.

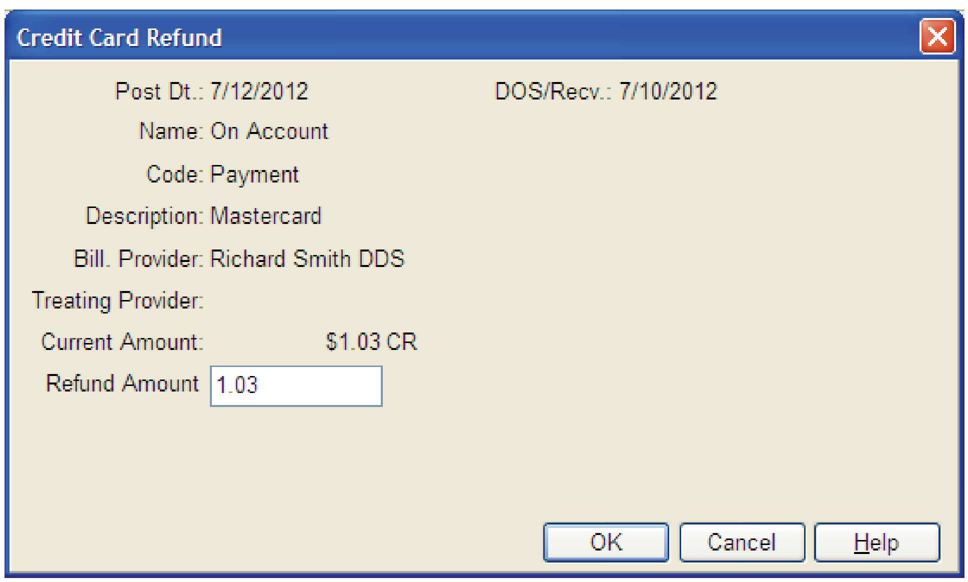
◆ **To refund a credit card payment:**

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.**



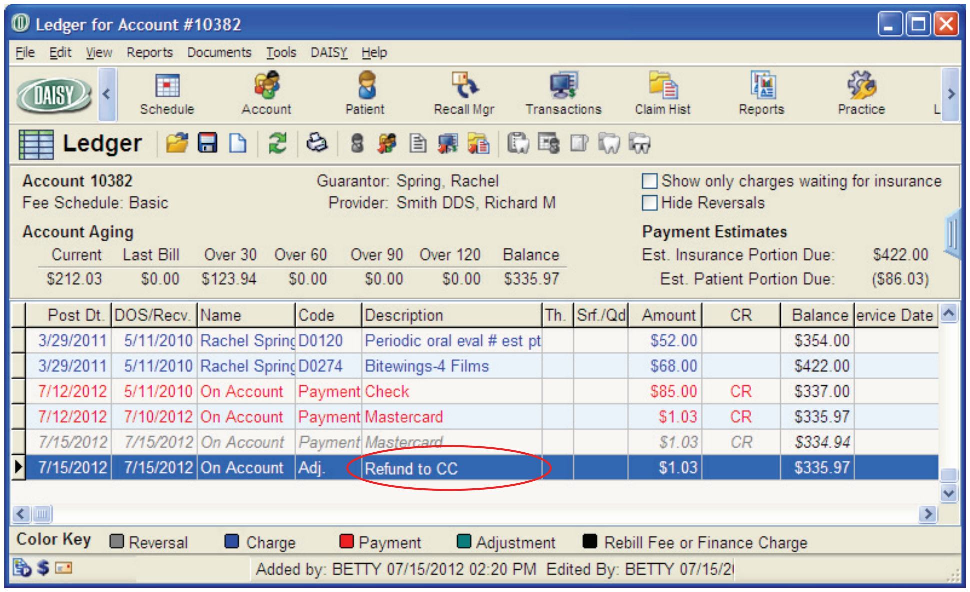
You see the Credit Card Refund dialog window.



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.



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.

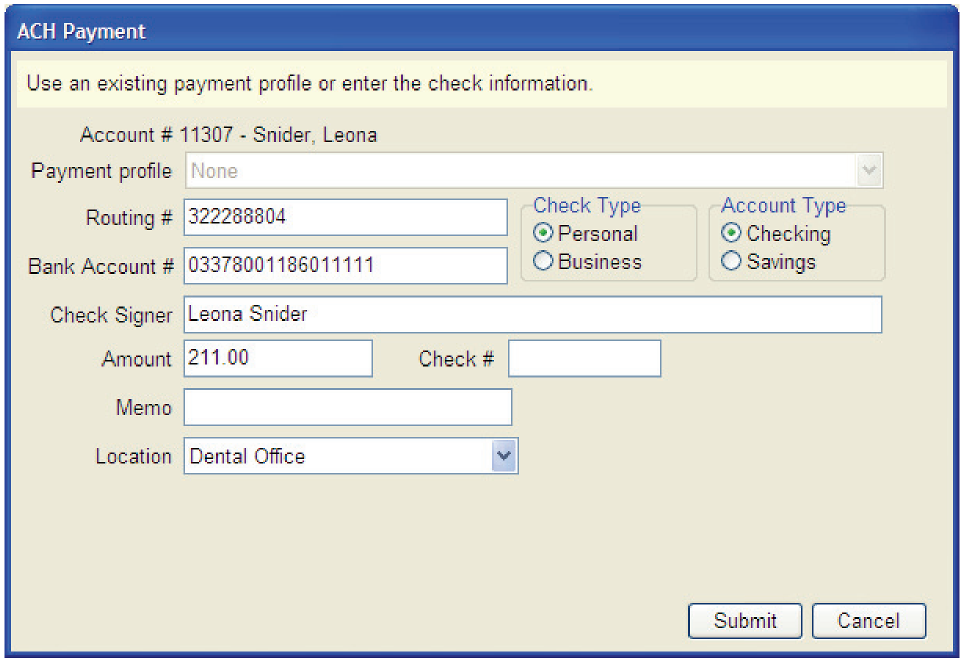
Note. For more information about payment profiles, see "Set up a payment profile" on page 42.

◆ **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.



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.

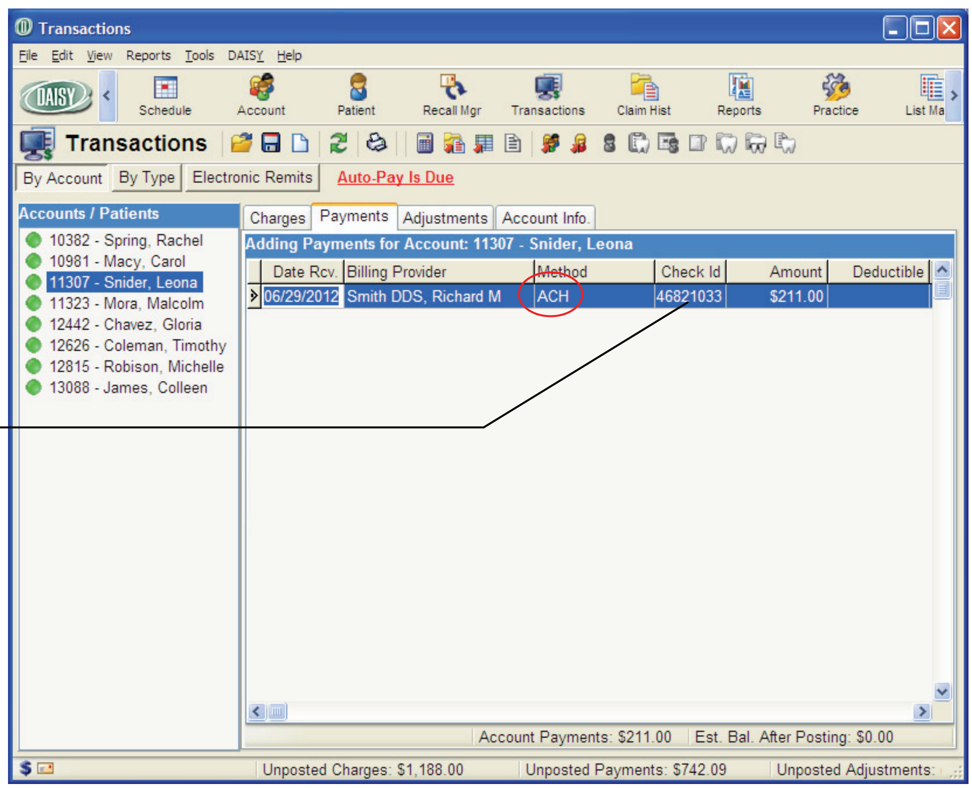
The memo displays in the Comment column for this payment in the Ledger window.

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.

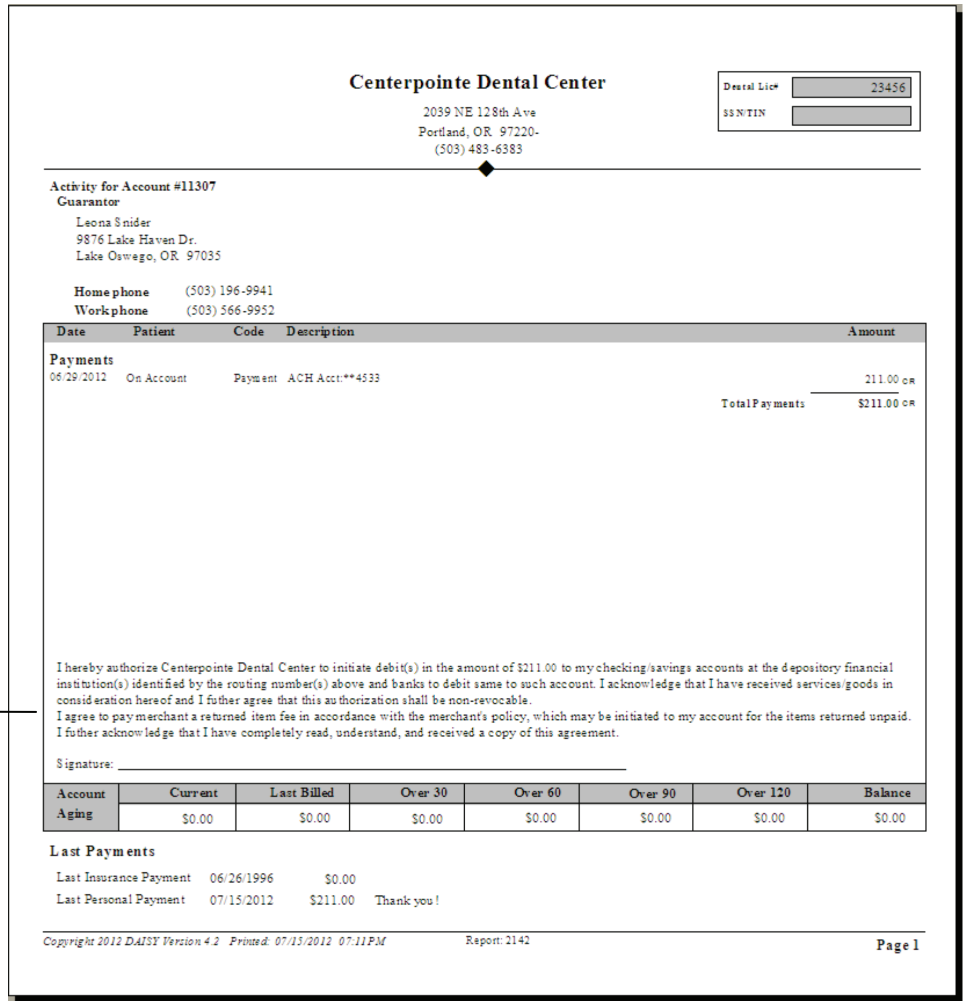


The transaction reference number displays here

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
2039 NE 128th Ave
Portland, OR 97220-
(503) 483-6383

Dental Lic#	23456
SSN/TIN	

Activity for Account #11307
Guarantor
Leona Snider
9876 Lake Haven Dr.
Lake Oswego, OR 97035

Home phone (503) 196-9941
Work phone (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

I hereby authorize Centerpointe Dental Center to initiate debit(s) in the amount of $211.00 to my checking/savings accounts at the depository financial institution(s) identified by the routing number(s) above and banks to debit same to such account. I acknowledge that I have received services/goods in consideration hereof and I futher 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 initiated to my account for the items returned unpaid.
I futher acknowledge that I have completely read, understand, and received a copy of this agreement.

Signature: ______________________

Account Aging	Current	Last Billed	Over 30	Over 60	Over 90	Over 120	Balance
	$0.00	$0.00	$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!

Copyright 2012 DAISY Version 4.2 Printed: 07/15/2012 07:11PM Report: 2142 Page 1

Visit summary reports now have an authorization statement and signature line

◆ **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.

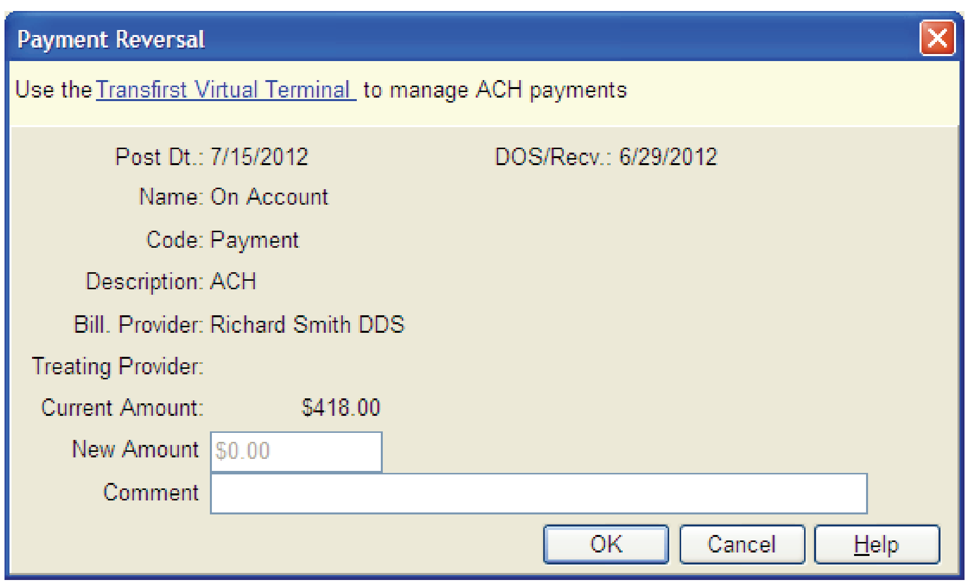
Manage ACH returns

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.

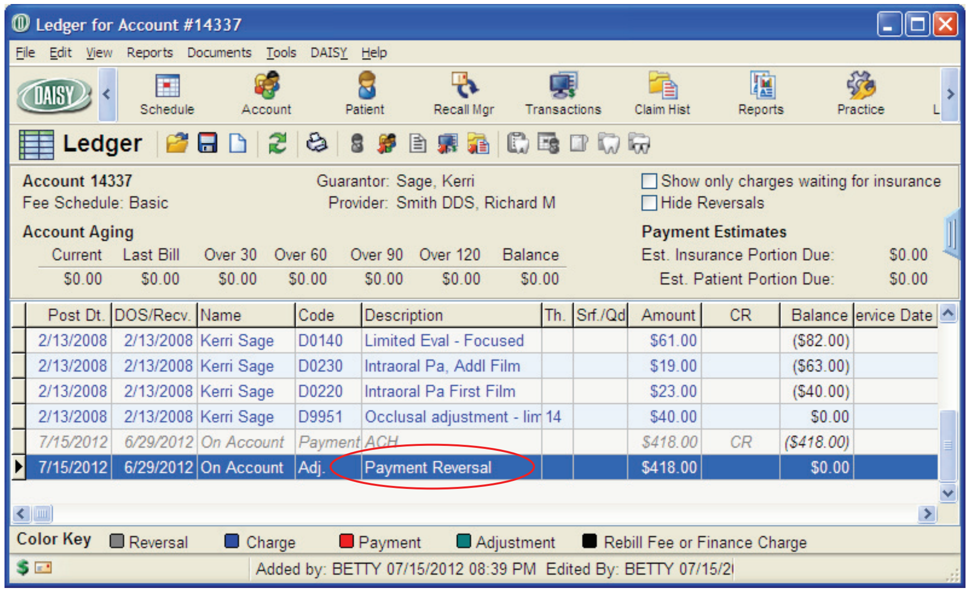
◆ **To reverse an ACH payment in the DAISY ledger:**

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.**



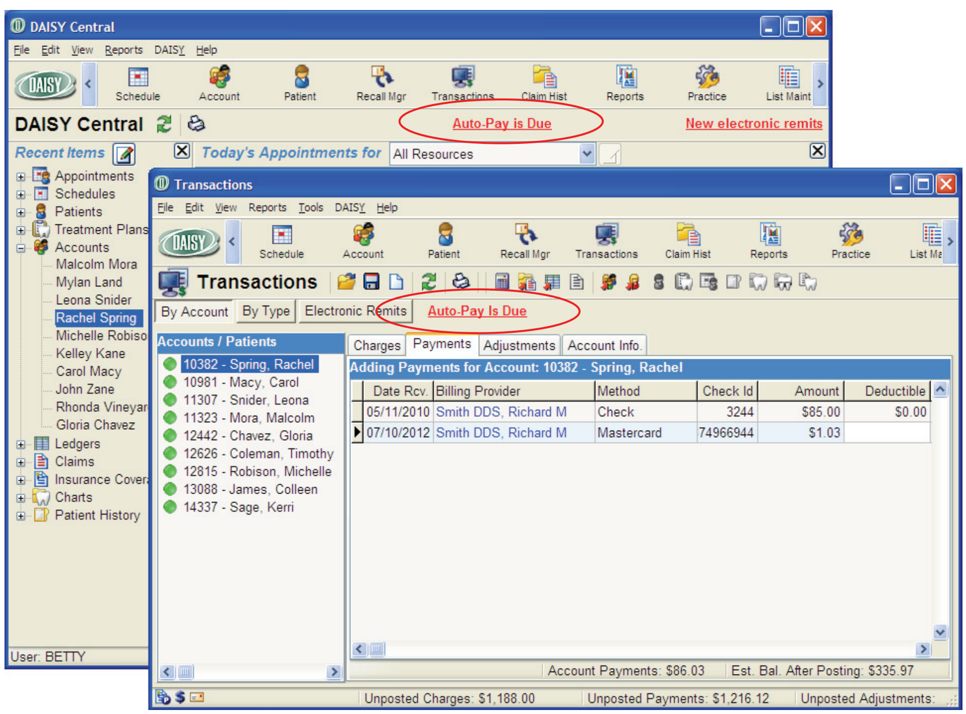
5. **In the Confirm window, click No to complete the adjustment.**

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.



◆ **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.

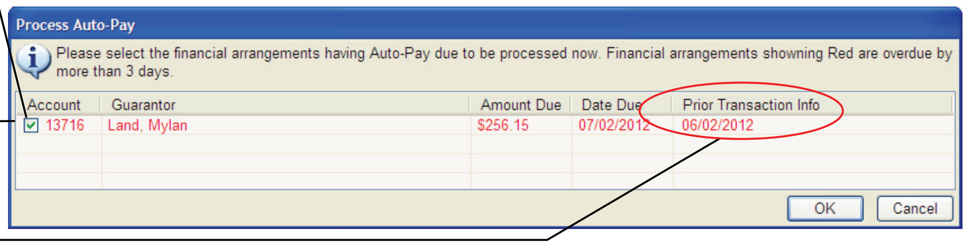
   To process an auto-pay payment, the check box next to the auto-pay payment must be checked. All payments are checked by default.

2. **Uncheck any auto-pay payments that you do not want to process.**

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



   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.

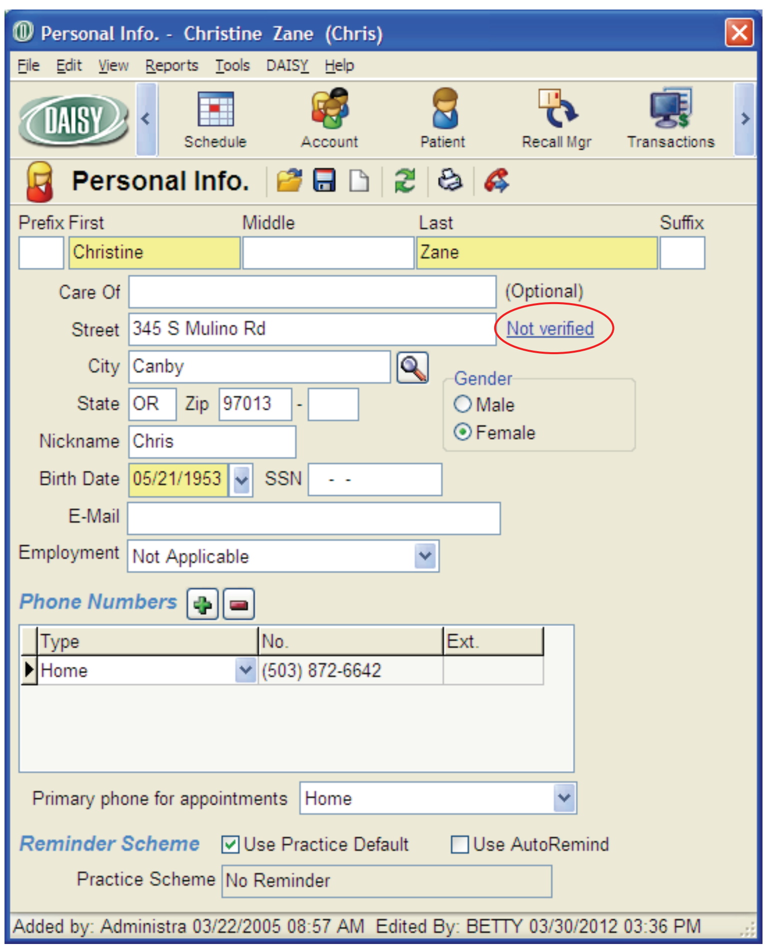
Other Enhancements

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.

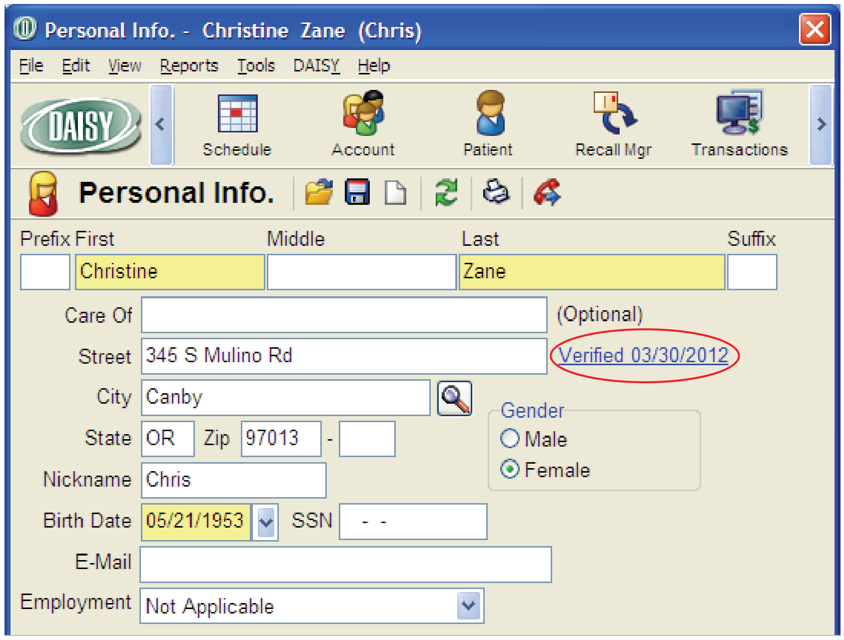
◆ **To verify a mailing address:**

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.**

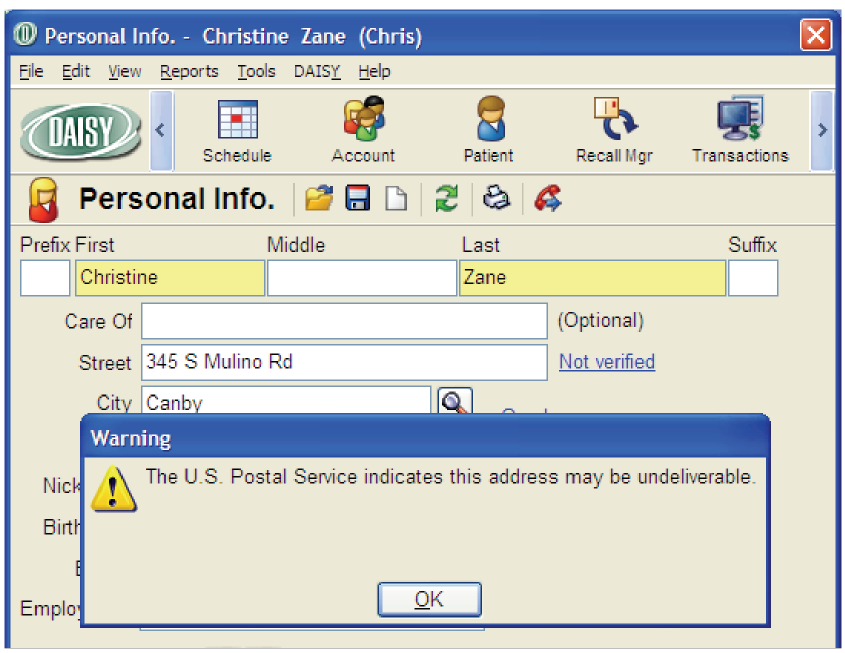


4. **Do one of the following:**

   - If the address matches the information in the USPS database, you see that the address verified and the verification date. Close the window.



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



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.

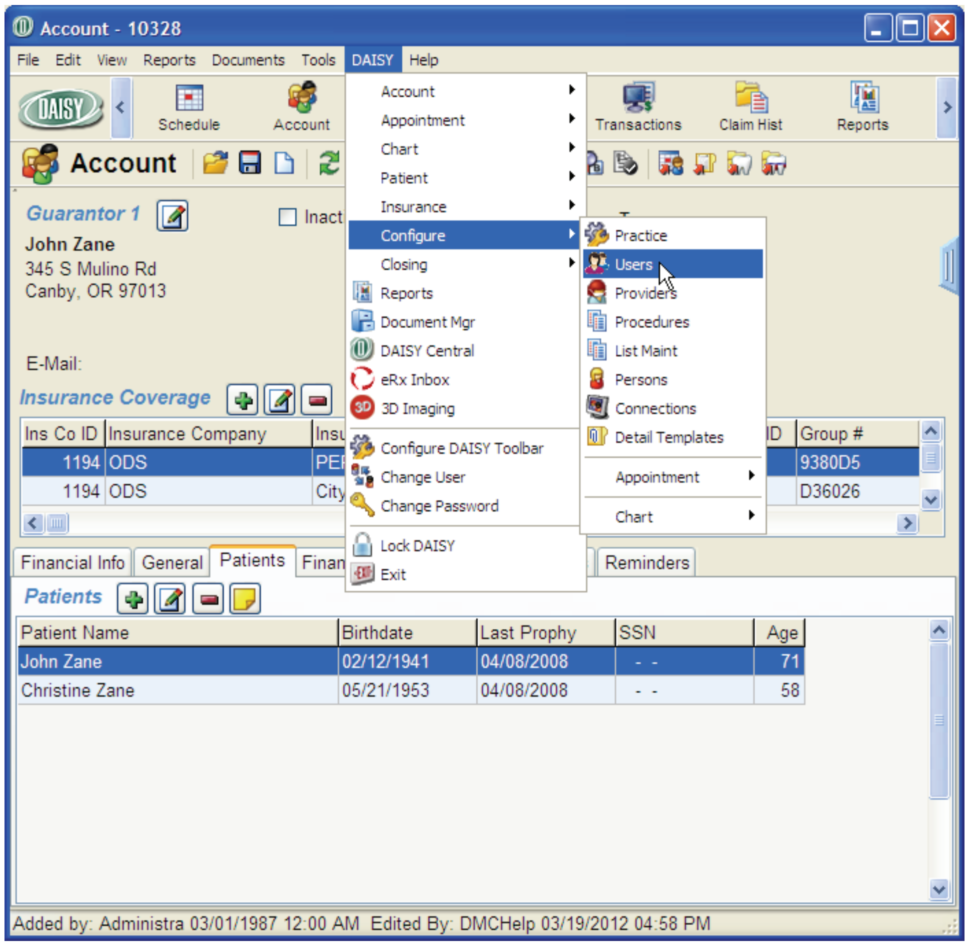
Manage user accounts

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.**

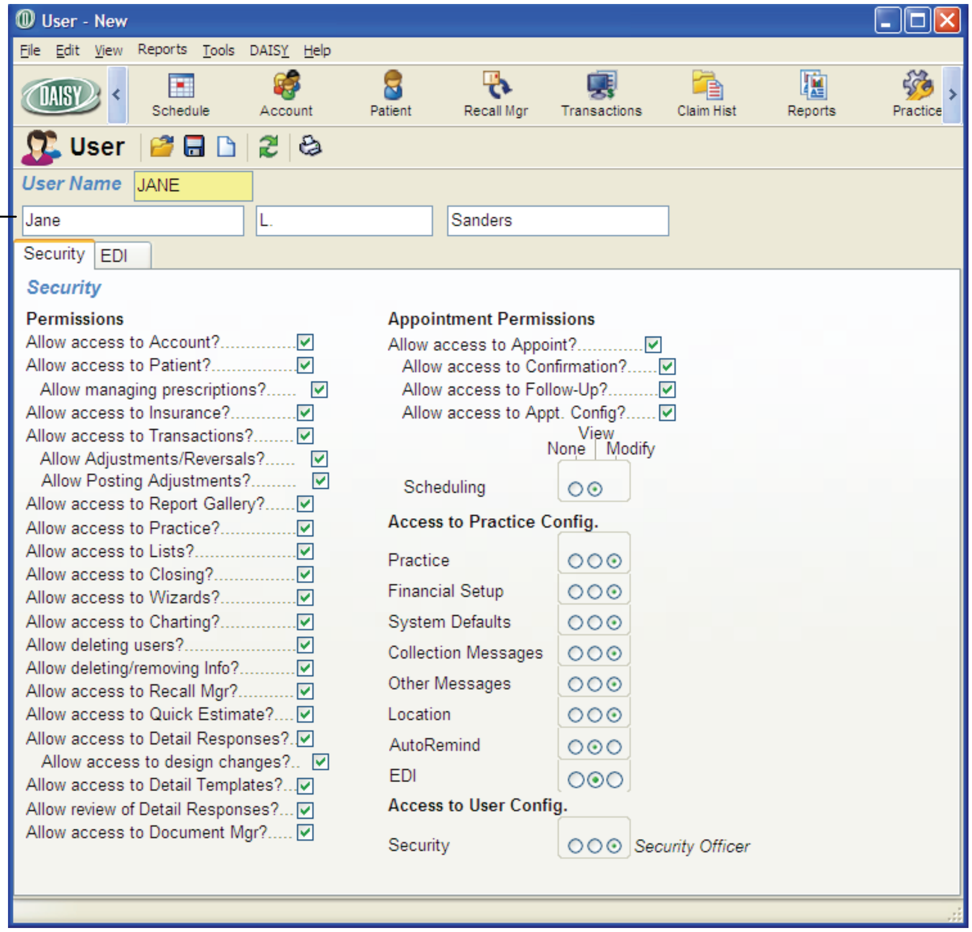


2. **Do one of the following:**

   - 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.

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



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.

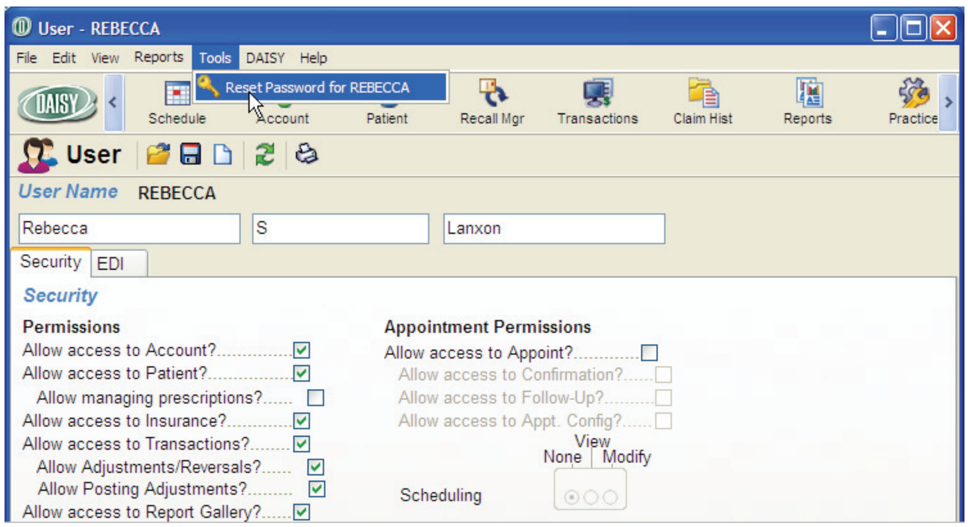
Reset a user password

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:**

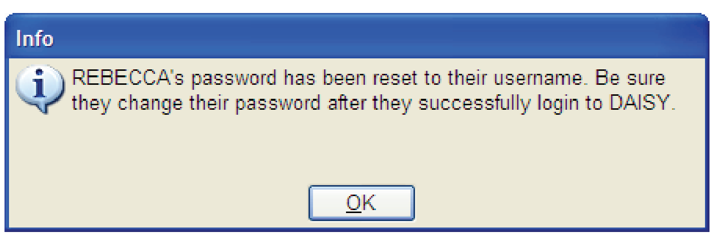
1. **From the DAISY menu, select Configure, then select Users.**
2. **Search for and select the user account whose password needs resetting.**
3. **Click OK to open the User window.**
4. **Click the Security tab.**



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.**

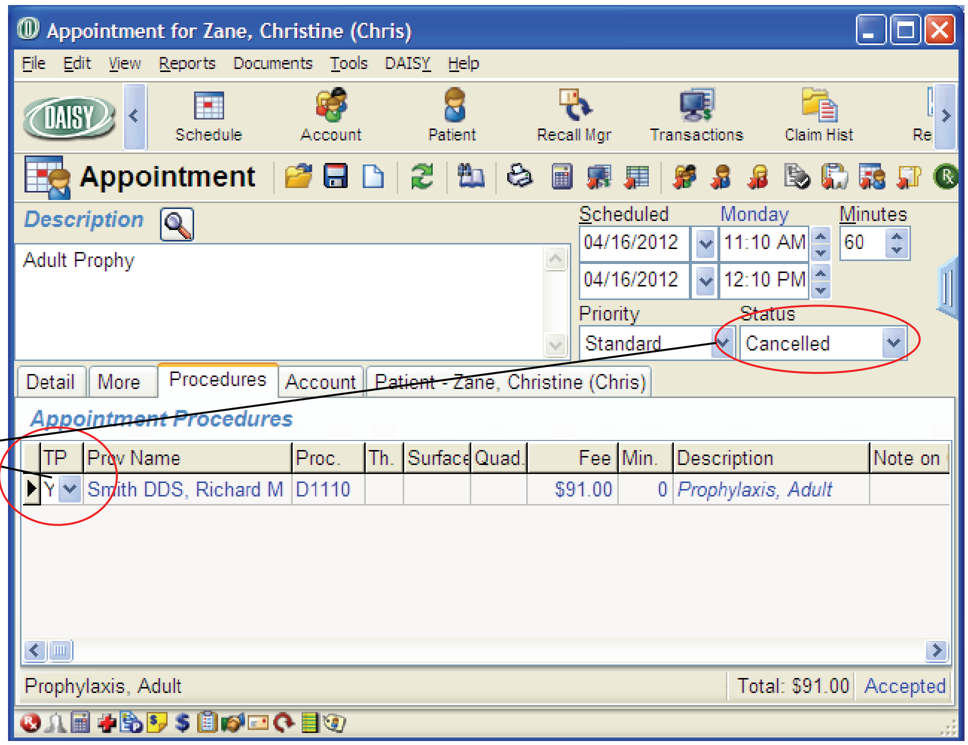


7. **Close the User window.**

Treatment plan reports

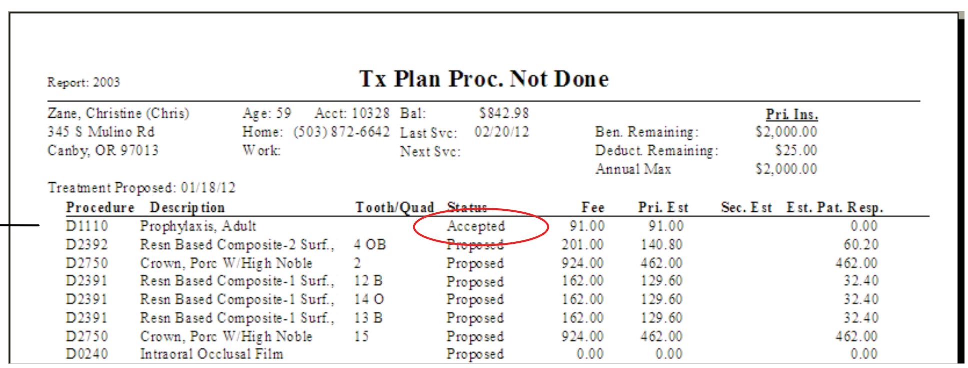
When you run the Tx Plan Proc. Not Done report (R2003), located in the Treatment Plans folder in the Report Gallery, it now shows a patient's accepted treatment plan procedures, even when those procedures are attached to a canceled or pending appointment.

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



The canceled appointment has a treatment plan procedure attached

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: 10328 | Bal: $842.98 | Pri. Ins.
345 S Mulino Rd | Home: (503) 872-6642 | Last Svc: 02/20/12 | Ben. Remaining: $2,000.00
Canby, OR 97013 | Work: | Next Svc: | Deduct. Remaining: $25.00
Annual Max $2,000.00

Treatment Proposed: 01/18/12

Procedure	Description	Tooth/Quad	Status	Fee	Pri. Est	Sec. Est	Est. Pat. Resp.
D1110	Prophylaxis, Adult		Accepted	91.00	91.00		0.00
D2392	Resn Based Composite-2 Surf.,	4 OB	Proposed	201.00	140.80		60.20
D2750	Crown, Porc W/High Noble	2	Proposed	924.00	462.00		462.00
D2391	Resn Based Composite-1 Surf.,	12 B	Proposed	162.00	129.60		32.40
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, Porc W/High Noble	15	Proposed	924.00	462.00		462.00
D0240	Intraoral Occlusal Film		Proposed	0.00	0.00		0.00

The accepted treatment plan procedures show on the Tx Plan Proc. Not Done report

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

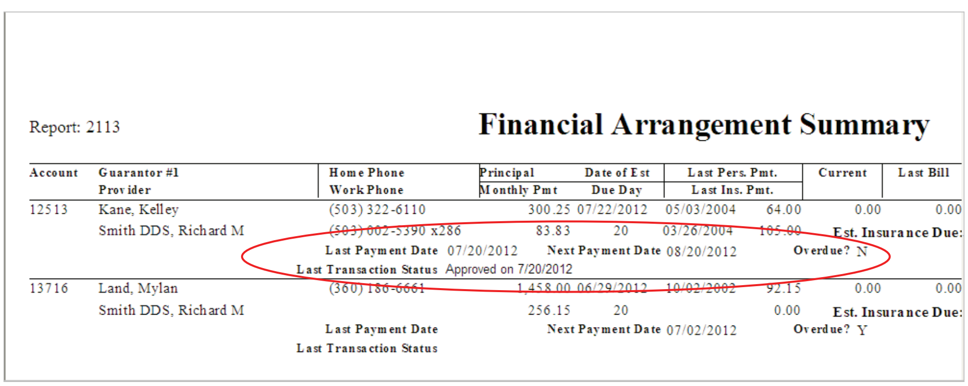
You can now filter the Financial Arrangement Summary report (R2113) for all payments, payments made with auto-pay, or payments made without auto-pay.

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



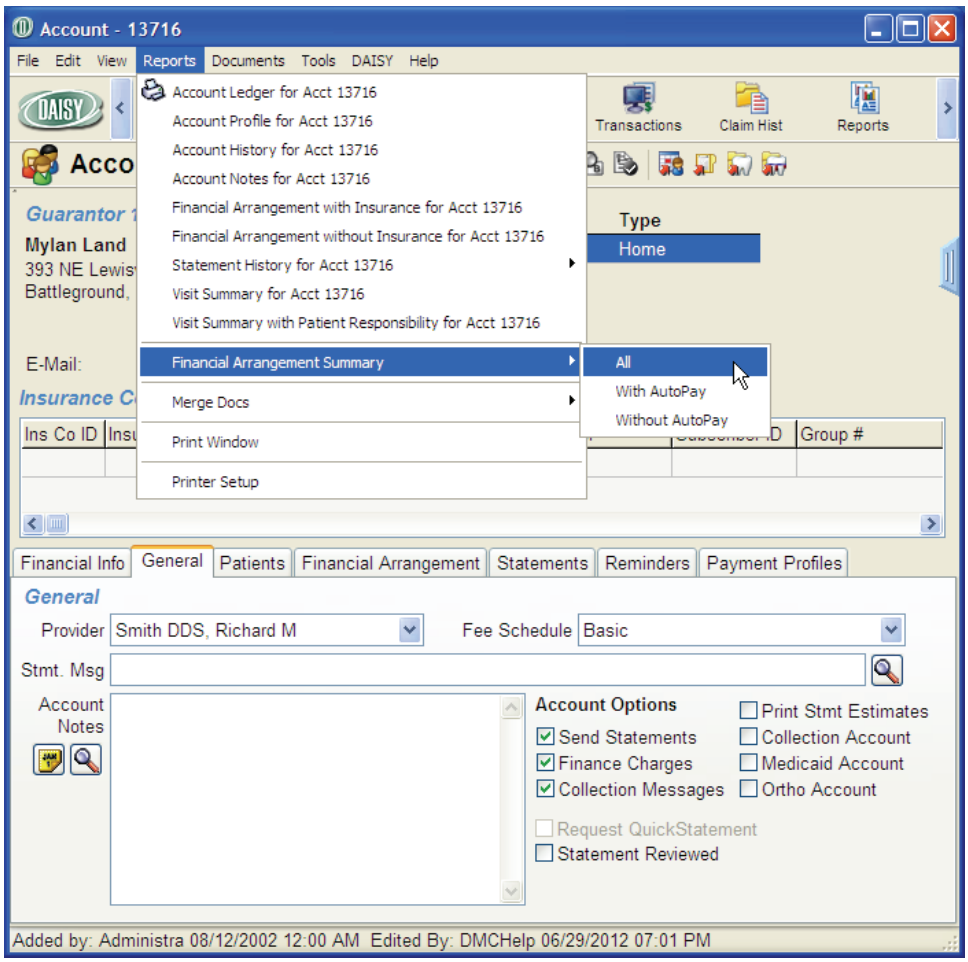
Report: 2113

Financial Arrangement Summary

Account	Guarantor #1 / Provider	Home Phone / Work Phone	Principal / Monthly Pmt	Date of Est / Due Day	Last Pers. Pmt. / Last Ins. Pmt.		Current	Last Bill
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. Insurance Due:	
	Last Payment Date 07/20/2012		Next Payment Date 08/20/2012				Overdue? N	
	Last Transaction Status Approved on 7/20/2012							
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		256.15	20		0.00	Est. Insurance Due:	
	Last Payment Date		Next Payment Date 07/02/2012				Overdue? Y	
	Last Transaction Status							

◆ **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.



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

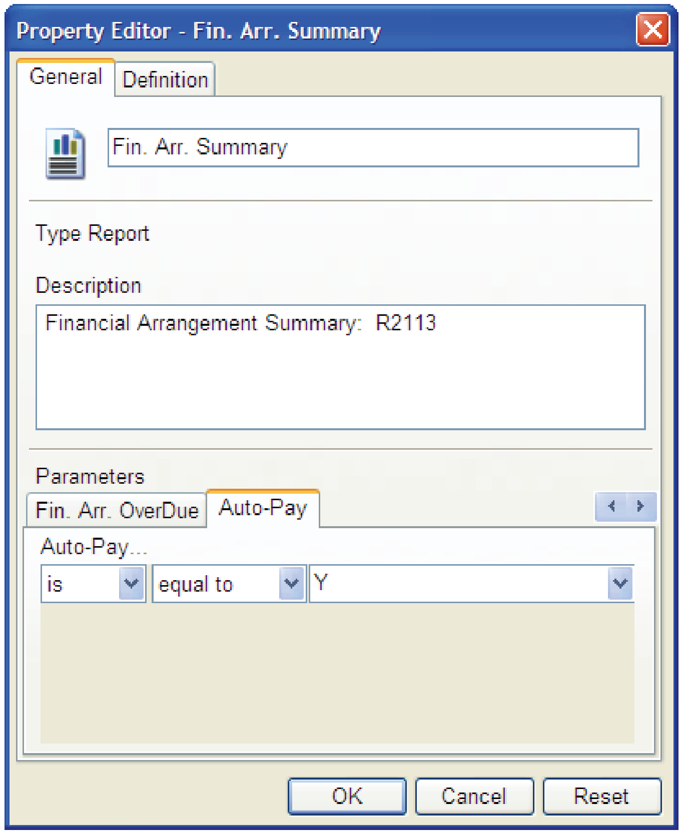
Note. You can also filter and run the report from the Report Gallery.

◆ **To run the Financial Summary Report from the Report Gallery:**

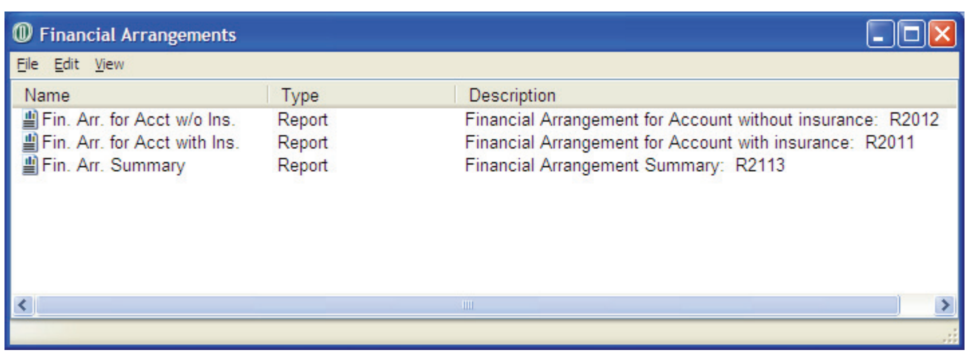
1. **From the DAISY toolbar, click .**
2. **Double-click the Financial Arrangements folder.**
3. **Right-click the Fin. Arr. Summary report and select Properties.**
4. **Click Reset to remove any filtering from the last time you ran the report.**

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.



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



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.

Malcolm Mora
234 NE Pacific
Portland, OR 97230

HAS YOUR ADDRESS CHANGED?

Centerpointe Dental Center
2039 NE 128th Ave
Portland, OR 97220

MAKE SURE THE ADDRESS ABOVE
APPEARS IN THE ENVELOPE WINDOW

PLEASE PRINT THE ACCOUNT NUMBER ON YOUR CHECK AND
RETURN WITH TOP PORTION OF THE STATEMENT

PAGE 1

ACCOUNT #11323

TRANSACTION DATE	PATIENT		DESCRIPTION	AMOUNT
			Previous Balance	1,272.00
6/1/2012	On Account	Payment	ACH Auto-Pay -Thank You!	1,072.00
6/1/2012		ADJ.	Transfer	3,200.00
6/1/2012	On Account	Payment	ACH Auto-Pay -Thank You!	1,072.00

Financial arrangement payment will be automatically billed on 08/02/12 337.58

A finance charge of 1.5% (18% annually) is added to all balances over 60 days old.

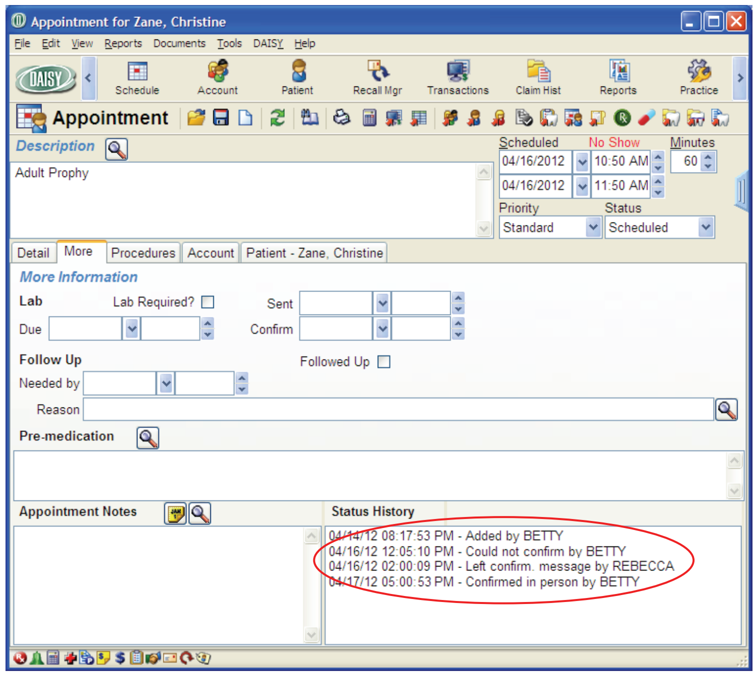
CURRENT	OVER 30	OVER 60	OVER 90	OVER 120	NEW BALANCE
2,328.00	0.00	0.00	0.00	0.00	2,328.00

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.

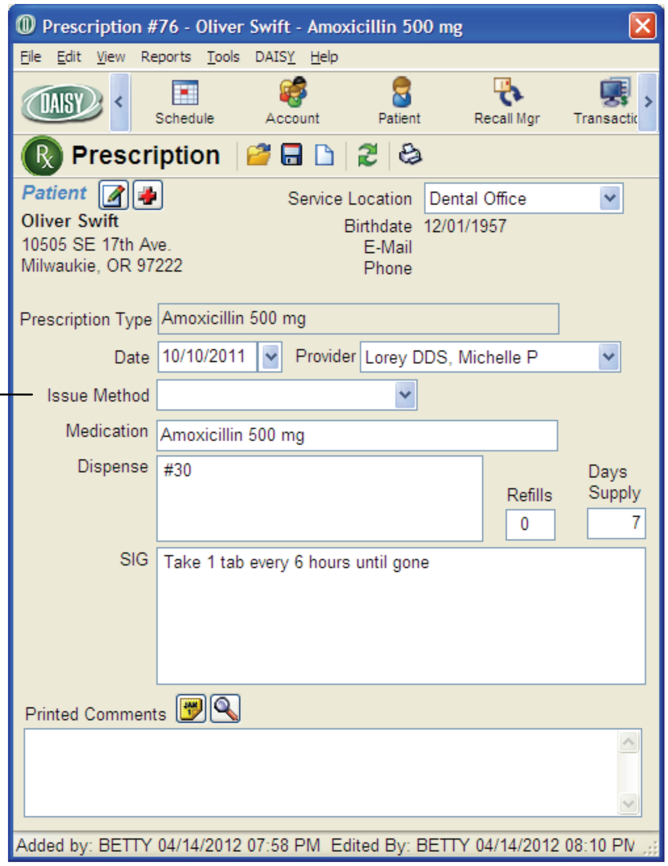
Prior to 4.2, the confirmation always read “Confirmed by *username*.” Starting with 4.2, confirmations are more specific, such as “Personal confirmation by RemindSvc.”



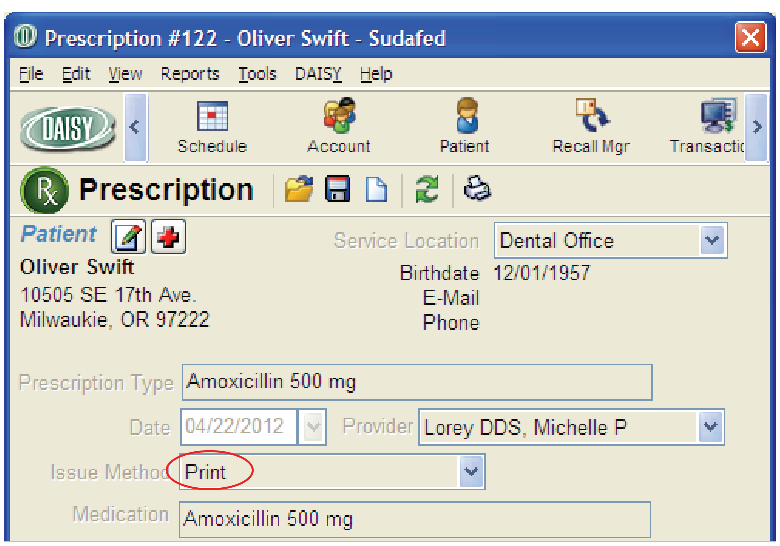
Prescription printing (without e-prescribing enabled)

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.

If Issue Method is blank, then DAISY defaults to Print



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

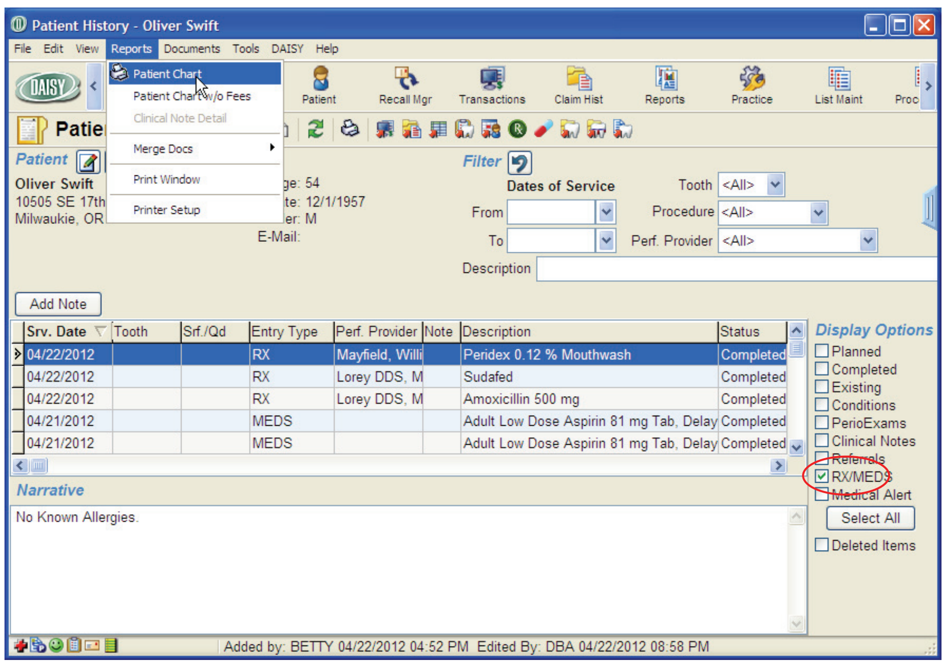


Patient Chart report

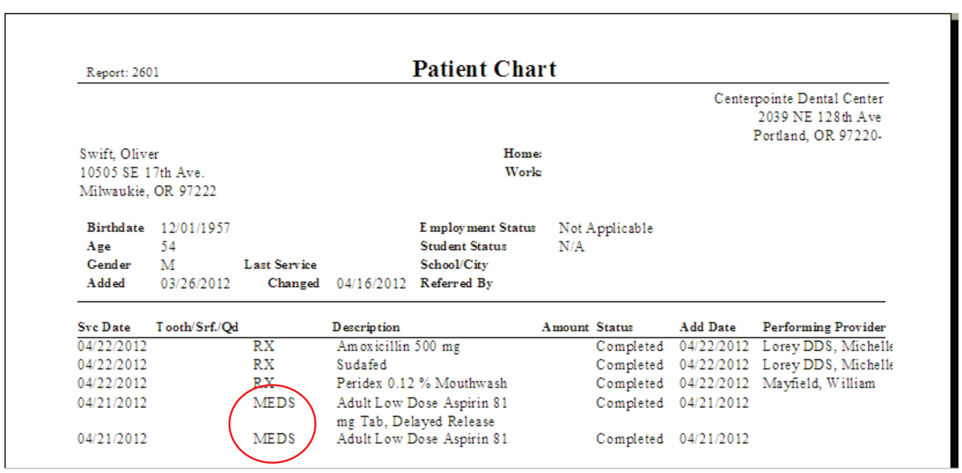
The Patient Chart report (R2601) now includes reported medications (called MEDS). This report is available from the Reports menu in the Patient History window.

◆ **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.**



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



Report: 2601

Patient Chart

Centerpointe Dental Center
2039 NE 128th Ave
Portland, OR 97220-

Swift, Oliver
10505 SE 17th Ave.
Milwaukie, OR 97222

Home:
Work:

Birthdate	12/01/1957			**Employment Status**	Not Applicable
Age	54			**Student Status**	N/A
Gender	M	**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		RX	Peridex 0.12 % Mouthwash		Completed	04/22/2012	Mayfield, William
04/21/2012		MEDS	Adult Low Dose Aspirin 81 mg Tab, Delayed Release		Completed	04/21/2012	
04/21/2012		MEDS	Adult Low 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.

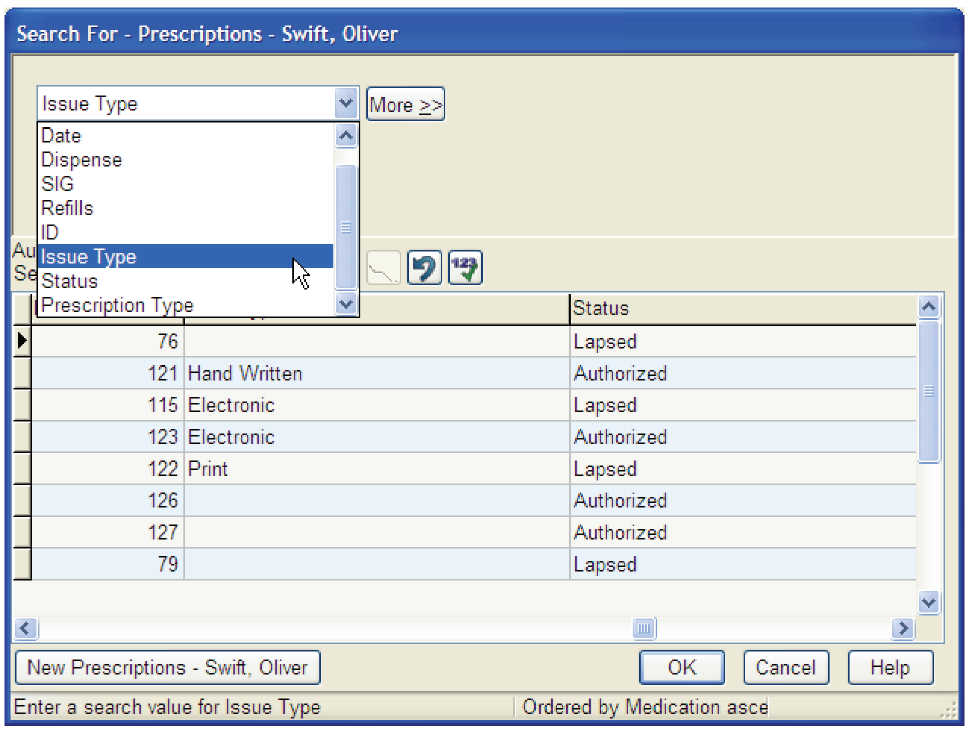
Search for patient prescriptions

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.**



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:**

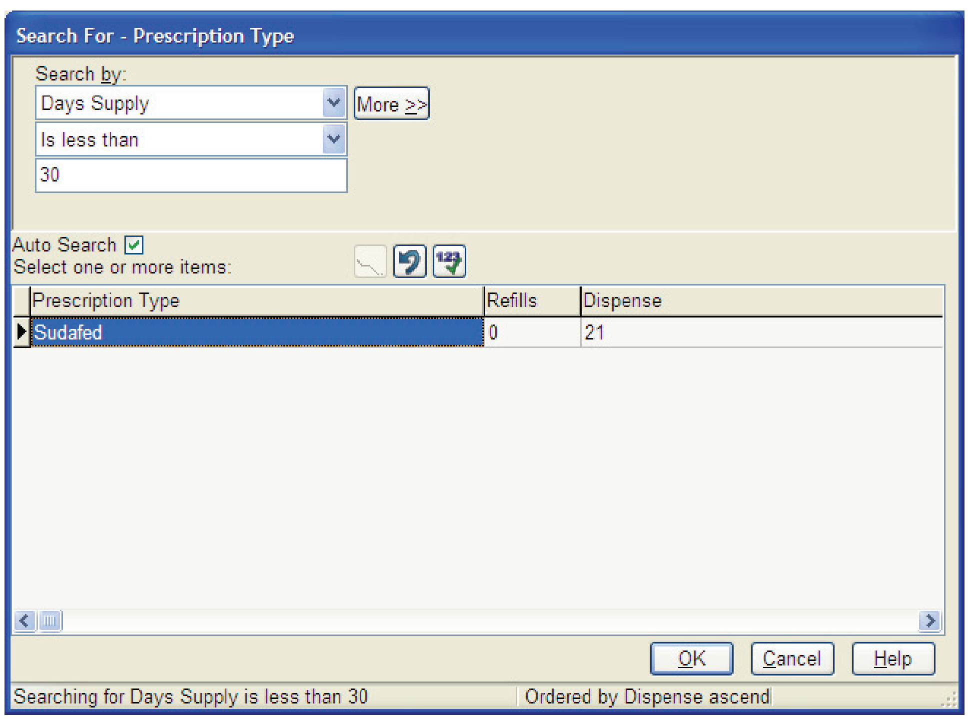
1. **From the DAISY toolbar, click .**
2. **Search for and select the patient, then click OK.**
3. **In the Quick Access toolbar, click to open the Search For – Prescriptions window.**
4. **In the drop-down list, select Status.**
5. **Click either Begins With or Contains.**
6. **Type the status of the 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:**

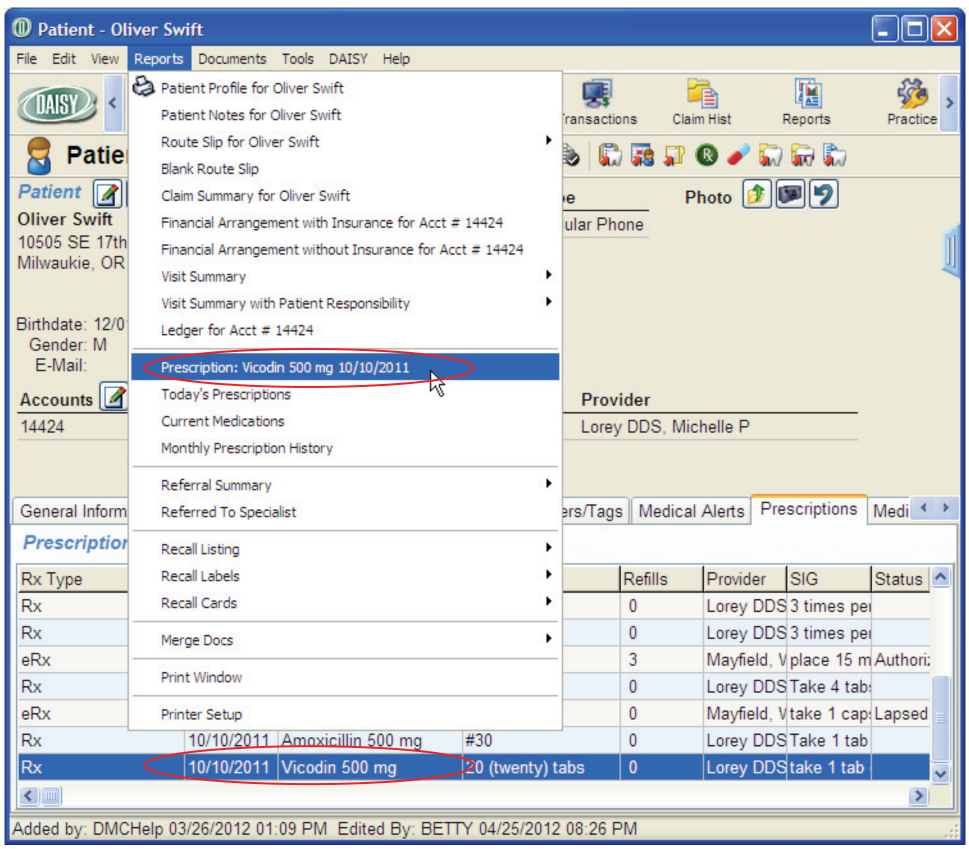
1. **From the DAISY toolbar, click .**
2. **Search for and select the patient, then click OK.**
3. **Click the Prescriptions tab.**
4. **In the Prescription tab, click to open the Search For – Prescription Type window.**
5. **In the Search By drop-down list, select Days Supply.**



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:



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.

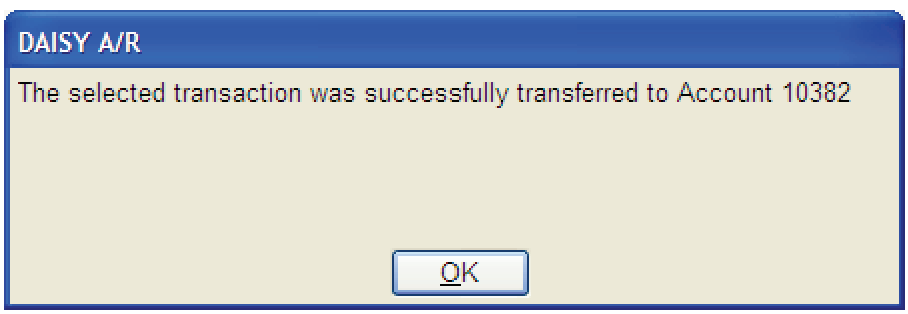
Note. When you transfer a personal payment to another account, all related refunds, if any, transfer with it.

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.



6. **Click OK to close the dialog window.**

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

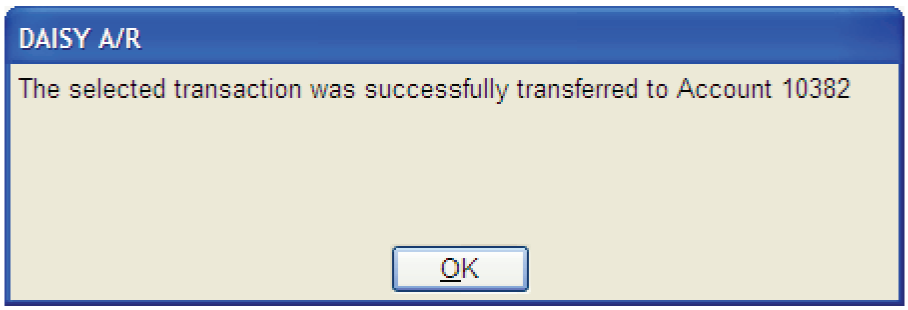
Note. The Activity Log records the transfer of unposted payments, including the account information and the transaction amount.

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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