

Release Notes

DAISY 4.0

NEW FEATURES

- Inactivate/Reactivate accounts and patients
- Enhanced treatment planning
- AutoRemind electronic appointment confirmation



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DAISY 4.0 Update Release Notes

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CHAPTER 1

What's New in DAISY 4.0

New Features

Inactivate and Reactivate Accounts and Patients

Accounts and patients can now be inactivated so they do not clutter up reports and searches with irrelevant information. When an account or patient is inactivated, it remains in the DAISY database as an inactive record and can be easily accessed at any time. All account and patient history remains attached to the inactive account or patient record.

For more information, see “Inactivate and Reactivate Accounts and Patients” on page 5.

Treatment Plan Enhancements

Enhanced treatment planning in DAISY gives offices more flexibility, making it easier to handle extensive treatment plans and to present different treatment options to a patient.

Patients can now have multiple treatment plans, and treatment plans can be phased. Each phase can include multiple visits. Treatment plan information can be easily reorganized and sorted, and completed treatment can be hidden from view.

Treatment plan reports now accommodate multiple treatment plans. Each of the new reports includes a variety of selections that enable offices to print all phases, all visits, specific phases, specific visits, and specific procedures. For offices with multiple doctors or multiple locations, you can specify the provider who proposed treatment and choose which provider's information prints on the treatment plan.

Treatment plan status reports (TX Plan Status by Patient and TX Plan Status by Provider) have also been completely redesigned. In previous versions of DAISY, you could filter treatment plan status only by patient or by provider. Now you can filter treatment plan procedures by whether they are scheduled or unscheduled.

If a patient has multiple treatment plans, you can choose which planned treatment to display on the patient's chart. Tooth graphics and treatment history display only treatment associated with the selected treatment plan. The Planned



Treatment display setting also affects how you enter treatment if the patient has more than one treatment plan.

For more information, see “Treatment Plan Enhancements” on page 13.

AutoRemind

DAISY 4.0 introduces a new add-on that uses a partner service called AutoRemind, which enables dental offices to automatically remind patients of upcoming appointments, resulting in fewer missed appointments and a more consistent revenue stream for the practice. Reminders can be delivered by phone, e-mail, or SMS text.

This new service is fully integrated with DAISY, and database synchronization between the two programs takes place automatically every hour. This synchronization sends the latest appointment information to AutoRemind and updates the confirmation status in the DAISY schedule.

With AutoRemind, practices can decide when and how to send reminders. The look of e-mail reminder messages can be customized by adding a practice logo or other appropriate image.

Reminder schemes enable practices to define a process for sending reminders to patients who have upcoming appointments. DAISY provides the ability to create and name multiple reminder schemes so customized processes for different types of patients or for individual patients can be set up.

To help you manage confirmations, DAISY 4.0 provides a new filter in the Confirmation window that finds all appointments set up with AutoRemind or just those without.

For more information, see “Use AutoRemind” on page 41.

For more information about subscribing to this service, contact DAISY Sales at 503.765.3471 or daisysales@dmcdental.com.

Other Enhancements and Fixes

Accounts

- When a patient is moved to a different account, the patient’s treatment can be migrated to the new account as well. For more information, see “Migrate the patient treatment plan to a new account” on page 39.

Appointments

- In the Schedule window, the Confirmation icon has changed. For more information, see “Synchronize AutoRemind with DAISY” on page 47.
- When an appointment for a procedure is scheduled with a performing provider who is different from the one originally specified on the treatment

plan, the performing provider is automatically changed when the procedure is attached to the appointment.

- The appointment date of scheduled treatment plan procedures now shows in the Appt Date column in both the Treatment Plan and the Chart windows. For more information, see “Treatment Plan Enhancements” on page 13.

Chart

- The Appt column in the procedures list at the bottom of the Chart window has been renamed to TP Seq (treatment plan sequence). This column can be used to indicate the sequential order for procedures in the treatment plan. The name of this column has also changed in the Treatment Plan window.

Prescriptions

- Prescriptions now include the patient's birth date.

Recall Manager

- The patient's e-mail address in the DAISY Recall Manager window is now active. Clicking the e-mail address now opens an e-mail client with a message addressed to the patient.

Reports

- In the Practice Analysis report, the count column now reflects only the accounts that have balances.
- The Patient List report, located in the Patient folder in the Report Gallery, now includes:
 - The patient's e-mail address
 - The patient's reminder scheme, such as phone, e-mail, or SMS text. For more information about reminder schemes, see “Manage reminder schemes” on page 48.
- Treatment plan status reports, located in the Treatment Plans folder (Tx Plan Status by Patient and Tx Plan Status by Provider) in the Report Gallery, now include tabs for filtering primary benefits remaining (Pri. Benefits Remain) and secondary benefits remaining (Sec. Benefits Remain).
- A new Tx Plan Proc. By Prov. Not Done report, located in the Treatment Plans folder, groups by provider all of the treatment plan procedures that are not done.
- The Tx Plan Proc. Not Done report, located in the Treatment Plans folder, now groups information by patient rather than by procedure.

Transactions

- When a posted charge is reversed, the procedure's status changes to “Planned” if it was originally part of a treatment plan. Also, the Add Date for the procedure changes to the date the charge was reversed.



CHAPTER 2

Inactivate and Reactivate Accounts and Patients

Starting with DAISY 4.0, inactive accounts and patients can be deactivated so they do not clutter up reports and searches with irrelevant information. When an account or patient is inactivated, it remains in the DAISY database as an inactive record and can be easily accessed at anytime. All account and patient history remains attached to the inactive account or patient record.

Accounts and patients can also be quickly reactivated, keeping all account and patient history intact.

- When an account is inactivated, all patients associated with that account are inactivated as well unless they are associated with another active account.
- If an account has multiple patients, specific patients can be inactivated.
- If a patient on the account has an appointment scheduled, DAISY warns that the appointment will be deleted before the account is inactivated.
- Offices can continue to send statements for inactivated accounts that have balances.
- Inactivated accounts continue to show up in the Accounts Receivable report and in Statement Manager as long as they have a balance.
- Patients that are inactivated do not appear in Recall Manager, even if the recall is still attached to the patient.
- Recall and treatment plan reports are automatically filtered to exclude patients and accounts that are inactivated. However, using the Inactive tab in the Property Editor, report filters can be set to include inactive accounts or patients.
- DAISY users who have the “Allow deleting/removing Info?” permission can inactivate and reactivate accounts and patients.
- Deactivation and reactivation activities are logged in the DAISY Activity Log report (Report Gallery > System Lists > Activity Log). Log information includes when the activity occurred and who made the change.

Note. Patient and account records can still be deleted.



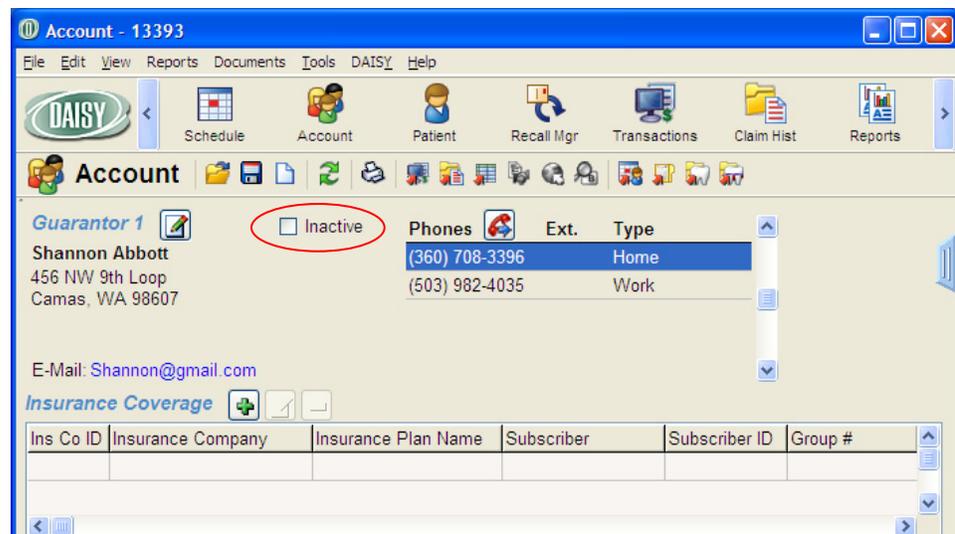
Inactivate an account

- When you inactivate an account, all patients associated with the account are inactivated as well unless they are associated with another active account.
- If a patient on the account has appointments scheduled, DAISY warns you that the appointments will be deleted before the account is inactivated.
- You can inactivate accounts with balances and continue to send statements for those accounts.

Note. You may want to remove the patient's insurance coverage before you inactivate an account.

◆ To inactivate an account:

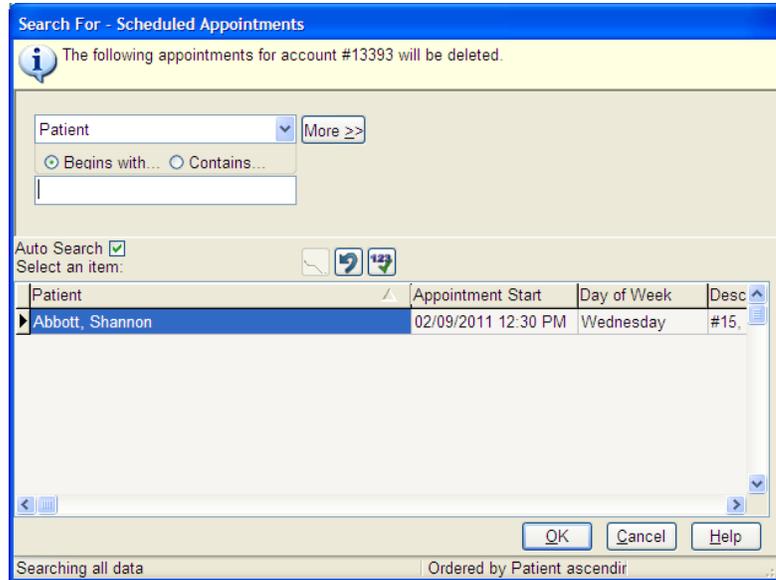
- 1 From the DAISY toolbar, click  .
- 2 Search for and select the account you want to inactivate, then click OK.
- 3 In the Account window, check the Inactive check box, then click  .



If no patients on the account have appointments, then the account is inactivated. If any patient on the account has appointments scheduled, DAISY warns you that the appointments will be deleted before the account is inactivated.

4 Do one of the following:

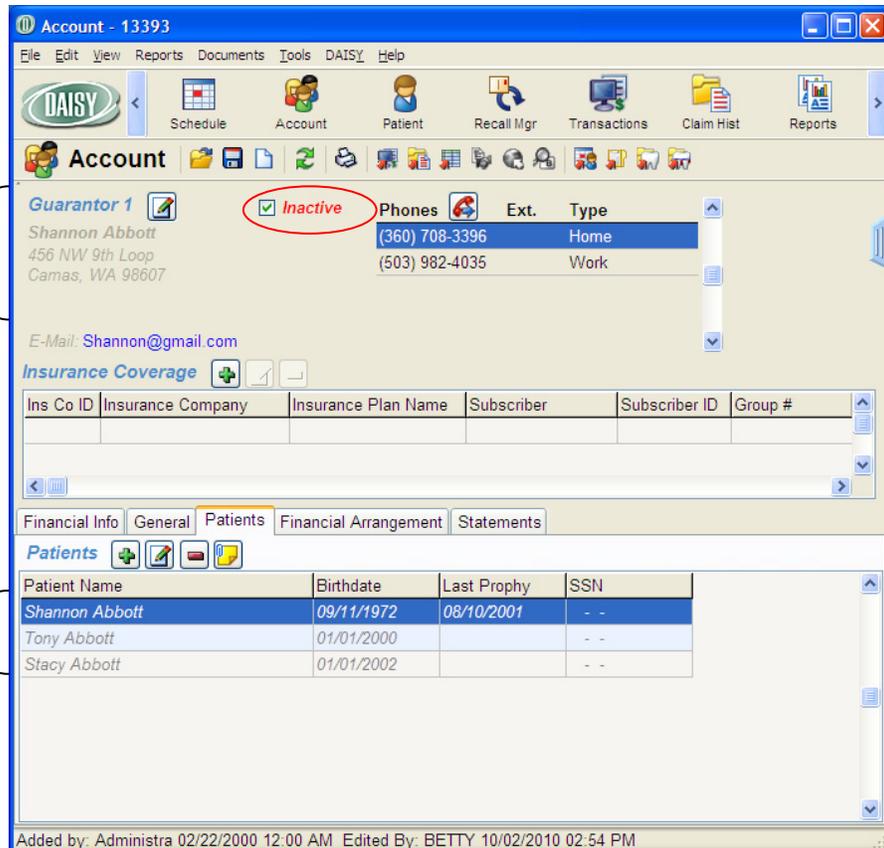
- Click OK to delete the appointments and inactivate the account.
- Click Cancel to keep the appointments scheduled and the account active.



DAISY grays out the guarantor information (except the e-mail address) and all patient information, and makes the Inactive check box name red.

Guarantor information on inactive accounts is grayed out

Patient information on inactive accounts is grayed out





Reactivate an account

- When you reactivate an account, all patients on the account are reactivated.
- All account history and history associated with patients on the account remains intact.

◆ To reactivate an account:

- 1 From the DAISY toolbar, click  .
- 2 In the Search For – Account window, check the Show Inactive check box.
- 3 Search for the account you want to reactivate.

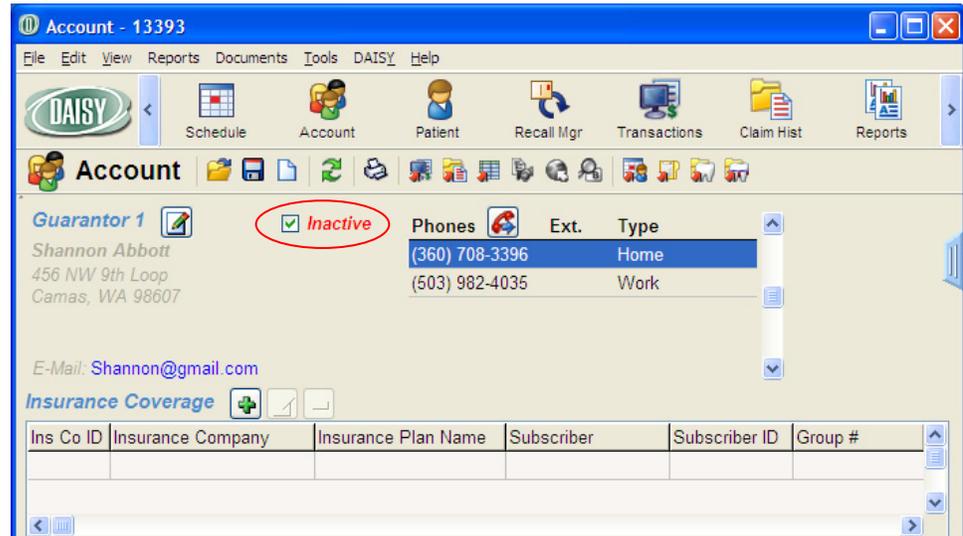
Inactive accounts are grayed out.

Inactive accounts
are grayed out

Guarantor 1	G1 Suffix	Acct No.	Acct Provide
Abbott, Shannon		13393	Smith DDS,
Abbott, Shannon		13393	Smith DDS,
Abbott, Shannon		13393	Smith DDS,
Abbott, Shirley		10510	Smith DDS,
Able, Daniel		12935	Smith DDS,
Able, Daniel		12935	Smith DDS,
Abrams, Moshe		13050	Smith DDS,
Account , Alexander D		14005	Smith DDS,
Account , Chad		14003	Smith DDS,

- 4 Select the account, then click OK.

5 In the Account window, uncheck the Inactive check box.



6 Click .

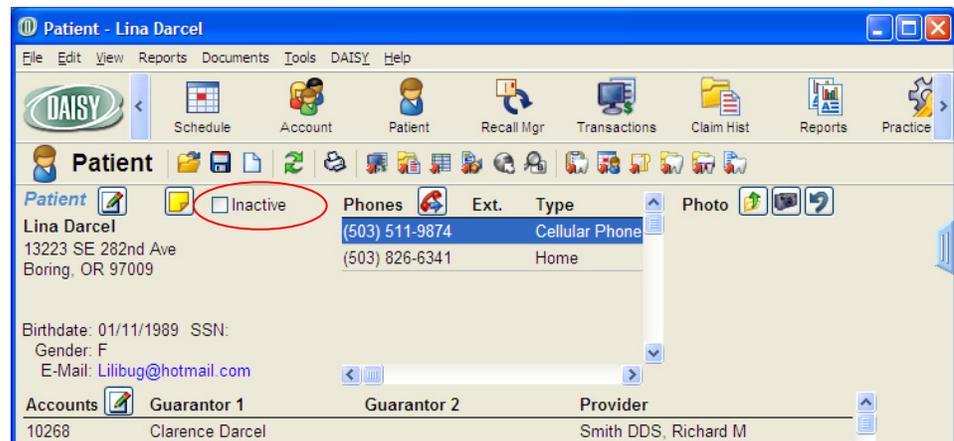
All patients on the account are reactivated and all history associated with the account is still attached to both the account and patients.

Inactivate a patient

- If a patient has appointments scheduled, DAISY warns you that the appointments will be deleted before the patient is inactivated.
- When you inactivate a patient, DAISY grays out the patient's information in the Account window.

◆ **To inactivate a patient:**

- 1 From the DAISY toolbar, click .**
- 2 Search for and select the patient you want to inactivate, then click OK.**
- 3 In the Patient window, check the Inactive check box, then click .**

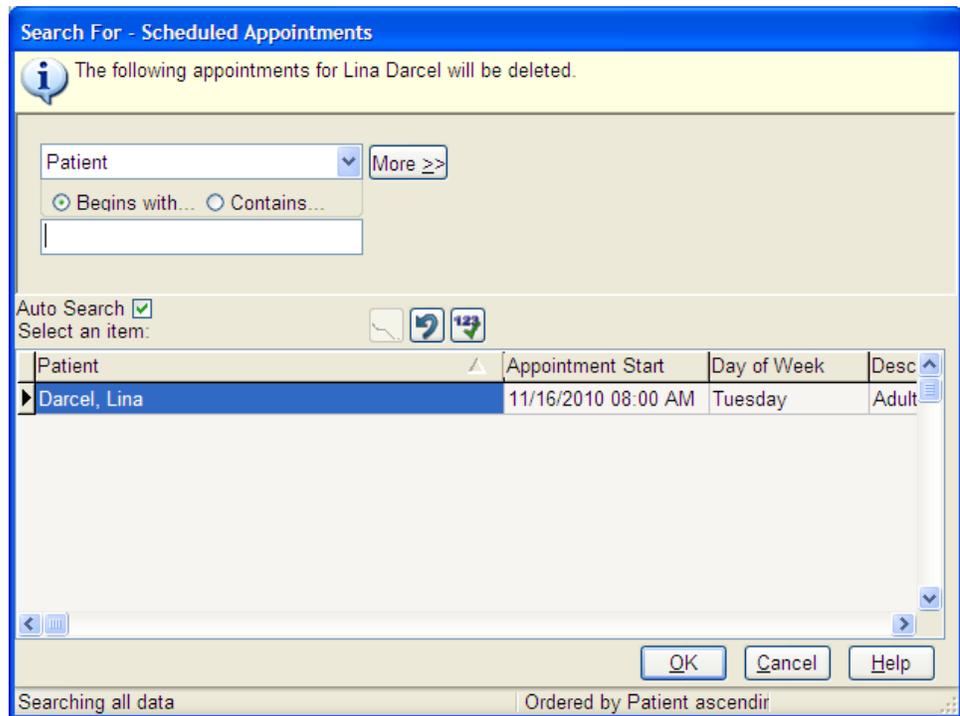




If the patient has no appointments, then the patient is inactivated. If a patient has appointments scheduled, DAISY warns you that the appointments will be deleted before the account is inactivated.

4 Do one of the following:

- Click OK to delete the appointments and inactivate the patient.
- Click Cancel to keep the appointments scheduled and the patient active.



DAISY grays out the patient information (except the e-mail address) and makes the Inactive check box name red.

Reactivate a patient

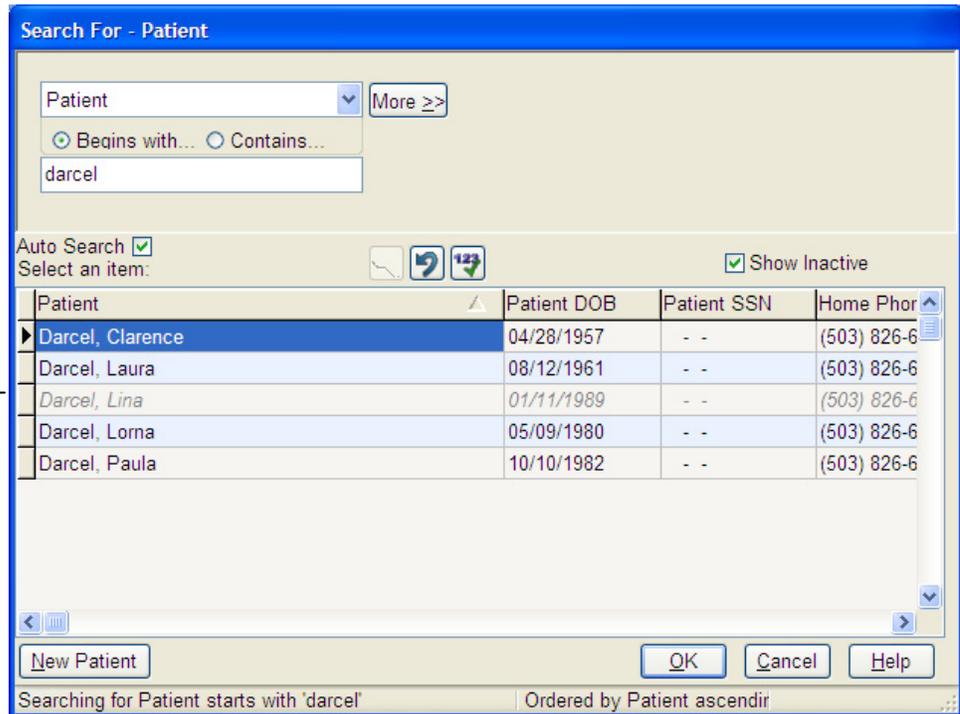
When you reactivate a patient, all history previously associated with the patient becomes available again.

◆ **To reactivate a patient:**

- 1 From the DAISY toolbar, click  .
- 2 In the Search For –Patient window, check the Show Inactive check box.
- 3 Search for the patient you want to reactivate.

Inactive patients are grayed out.

Inactive patients are grayed out



- 4 Select the patient, then click OK.
- 5 In the Patient window, uncheck the Inactive check box.
- 6 Click  .

All history associated with the patient is now viewable.



CHAPTER 3

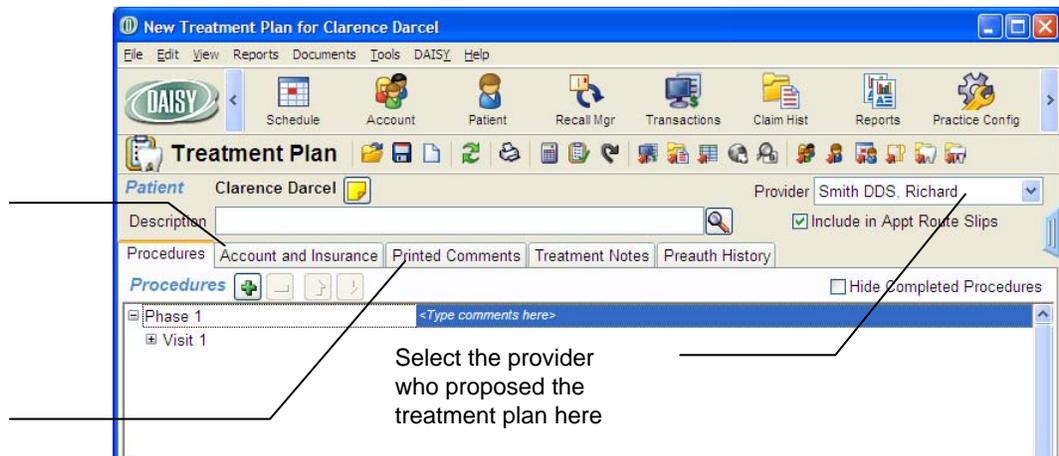
Treatment Plan Enhancements

DAISY 4.0 includes several enhancements for treatment plans. Patients can now have multiple treatment plans, and treatment plans can be phased. Each phase can include multiple visits. Treatment plan information can be easily reorganized and sorted, and completed treatment can be hidden.

- In the Treatment Plan window:
 - Account and insurance information has been moved to a new Account and Insurance tab to provide more room for phased treatment plans.
 - A Provider drop-down list enables you to select the provider who proposed the treatment plan.

View account and insurance information here

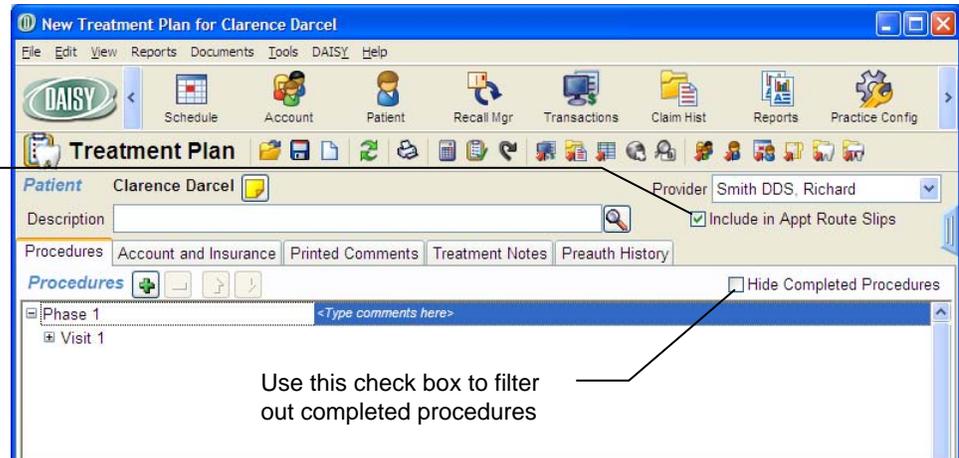
Use this tab to add comments to the printed treatment plan





- A new Hide Completed Procedures check box enables you to filter out completed procedures.
- Planned treatment can now be omitted from the appointment route slip.

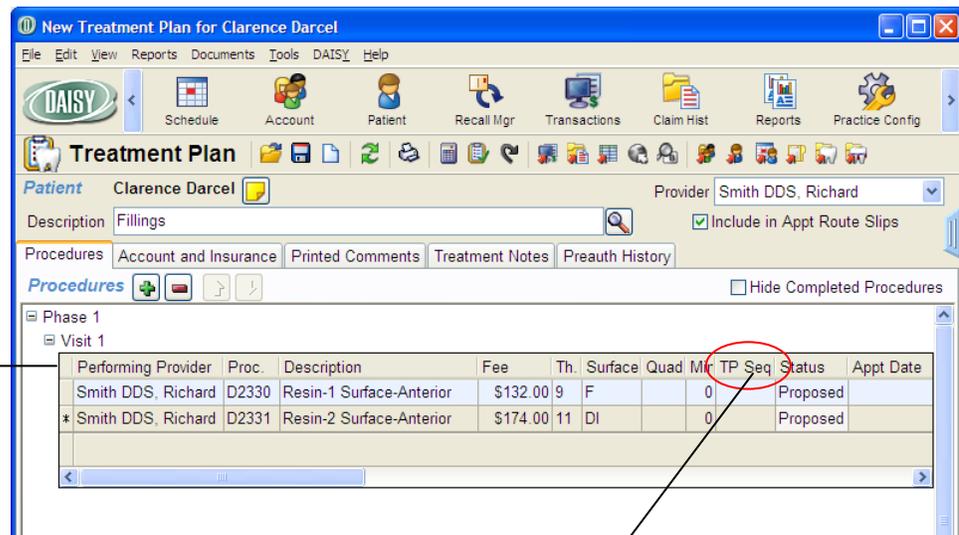
Uncheck this check box to omit planned treatment from the appointment route slip



Use this check box to filter out completed procedures

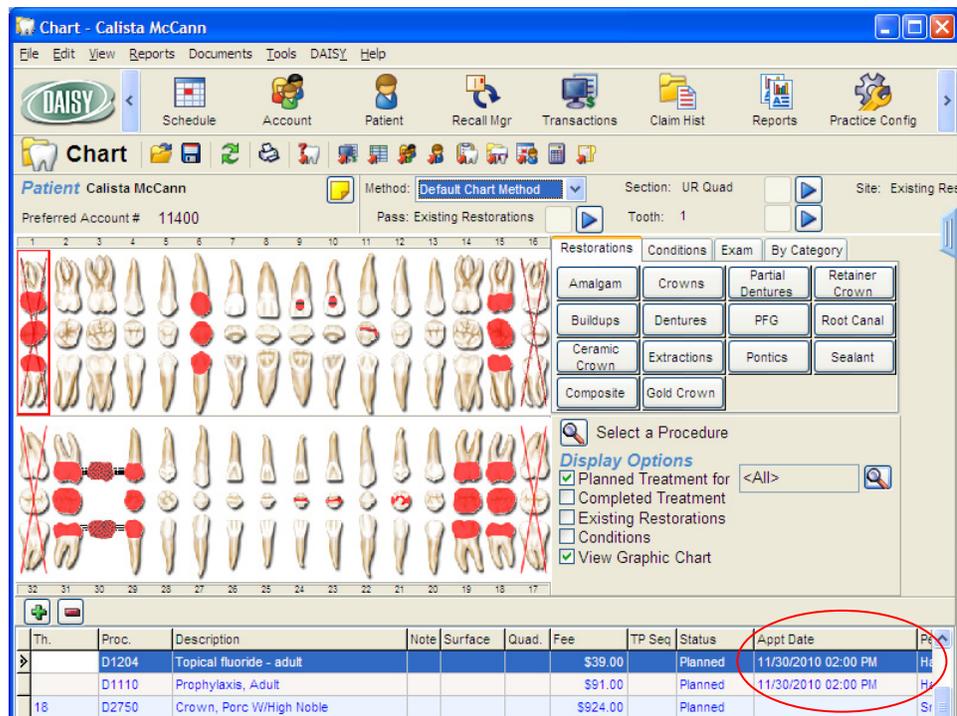
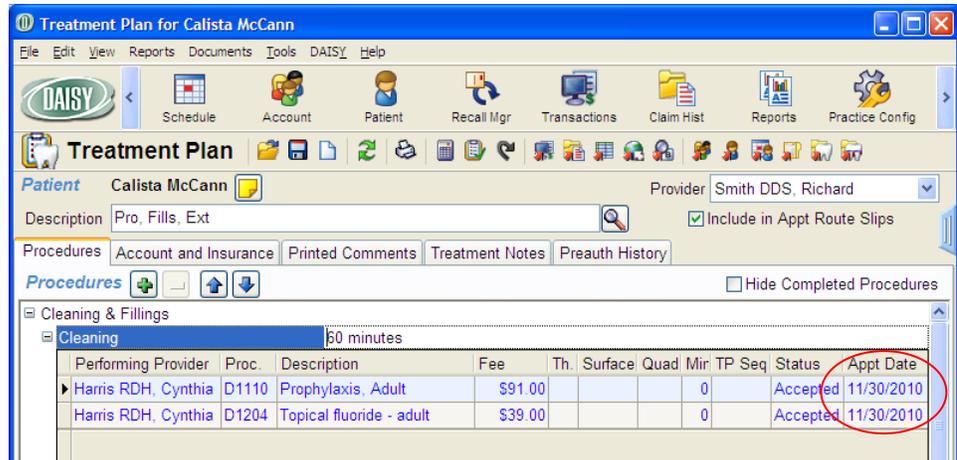
- Treatment plan information, such as providers, procedures, teeth, etc. can now be sorted by clicking on the column headings.
- Phases, visits, and procedures can be reordered using drag and drop or the new up/down arrows (↑ ↓).
- The Appt column has been renamed to TP Seq (treatment plan sequence). This column can be used to indicate the sequential order for procedures in the treatment plan.

Click column headings to sort treatment plan information



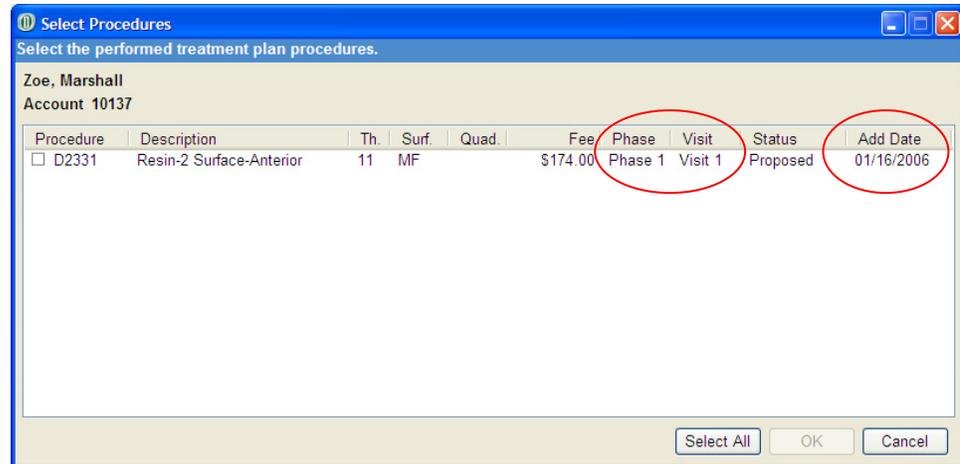
The Appt column has been renamed

- The appointment date of scheduled treatment plan procedures now shows in the Appt Date column in both the Treatment Plan and the Chart windows. To open the appointment, right-click the appointment date and select Open Appointment.





- The Select Procedures window now includes Phase, Visit, and Add Date columns. This window lists the patient's treatment in order of treatment plan, phase, visit, and procedure. For more information, see "Create a treatment plan" on page 17.



- Treatment plan reports have changed as follows:
 - Under the Reports menu in the Treatment Plan window, menu selections have changed to accommodate multiple treatment plans. Each of the new main menu selections, Treatment Plan and Treatment Without Fees, includes a variety of selections that enable you to print all phases, all visits, specific phases, specific visits, and specific procedures. For more information, see "Print a treatment plan" on page 26.
 - The treatment plan report now displays the financial and insurance information at the bottom of the report. The printer icon () prints the entire treatment plan. To print only parts of the treatment plan, use the Reports menu.
 - Printed comments can now be any length. Printed comments display below the financial and insurance information.
 - Completed treatment no longer prints on Treatment Plan reports.
 - In an office with multiple doctors or multiple locations, regardless of whom was listed as the performing provider, the old treatment plan report only listed the practice provider name. In the new report, a provider can be selected on the treatment plan. Provider information is pulled from the Provider window.
 - Treatment plan reports run from the Report Gallery now reflect the new multiple treatment plan capabilities in DAISY 4.0, such as multiple phases.
- The Patient History window shows all planned procedures, regardless of which treatment plan they are attached to.

Create a treatment plan

In this example, the treatment plan requires three visits in two phases. The resulting treatment plan will include fillings and wisdom tooth extractions.

◆ **To create a treatment plan:**

- 1 From the DAISY toolbar, click .
- 2 Search for and select the patient you want, then click OK.
- 3 Click .
- 4 Do one of the following:
 - If the patient does not have a treatment plan, go to step 5.
 - If the patient already has a treatment plan, click  to create a new treatment plan.
 - If the patient has two or more treatment plans, the Search For – Treatment Plan window opens. Click New Treatment Plan to create a new treatment plan.

Search For - Treatment Plan

Select the treatment plan you want to open for Darcel, Clarence.

Search by:

Add Date

Is on date

Auto Search

Select an item:

Add Date	Description	Acct No.	Est. Amt
11/23/2010	Prophy	10268	\$130.00
11/27/2010	Fillings and Extractions	10268	\$0.00

Searching for Add Date is on 12/30/1899 | Ordered by Add Date ascen

Click here to create another treatment plan for this patient



5 In the Treatment Plan window, click the Procedures tab.

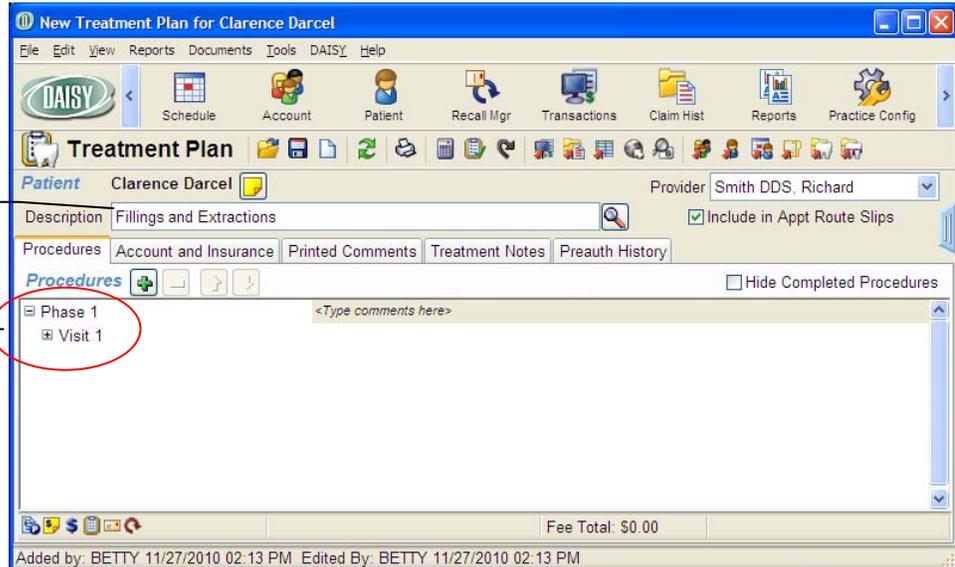
In the Procedures section, you see a treatment plan tree at left with two default entries: Phase 1 and Visit 1.

6 In the Description text box, type a name for the Treatment Plan.

For example, type Fillings and Extractions.

Use the Description text box to name the treatment plan

Use the treatment plan tree to organize treatment plan phases and visits



7 In the treatment plan tree:

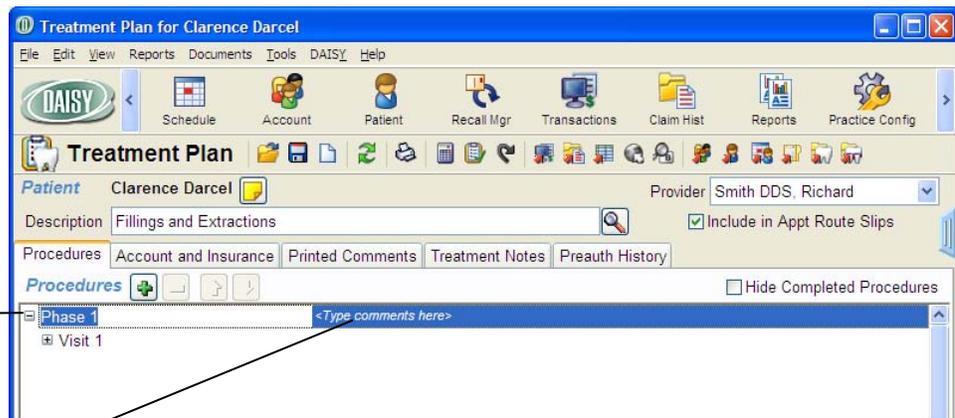
- Click the phase label and type a new name for the phase. For example, click Phase 1 and type Fillings.

Note. Renaming the phase is optional, but label names are required for all phases.

- In the <Type comments here> cell, type an optional comment.

To rename the phase, click "Phase 1" and type a new name

Use the comments text box to add comments or instructions

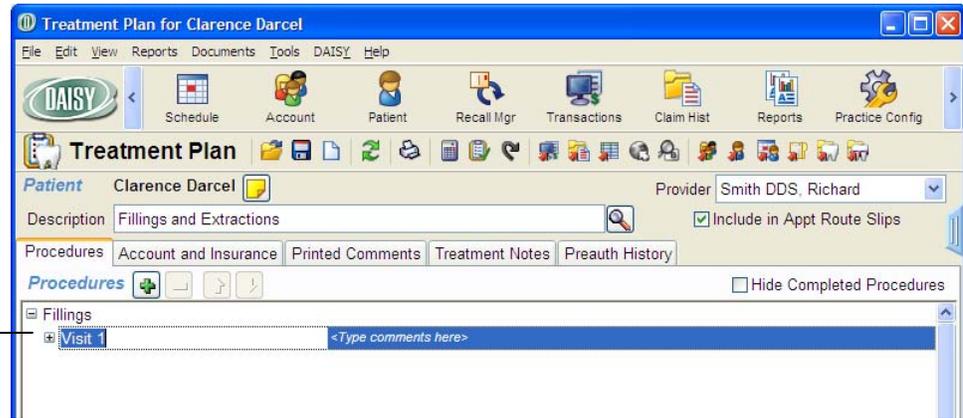


Note. Comments associated with phases do not print on the Treatment Plan report.

- Click the visit label and type a name for the visit. For example, click Visit 1 and type Fillings.

Note. Renaming the visit is optional, but label names are required for all visits.

Click "Visit 1" to rename the visit



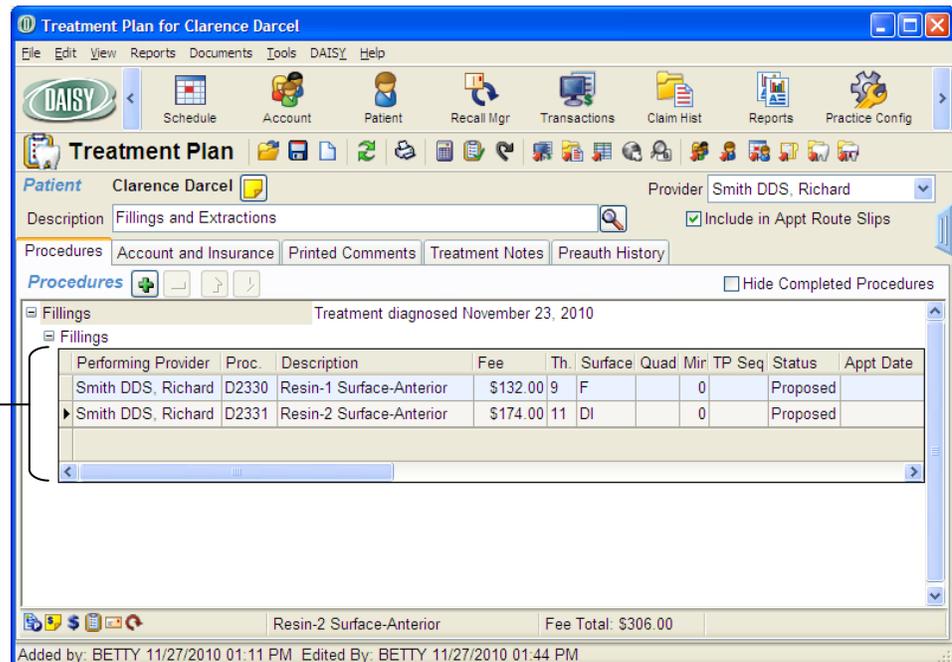
- In the <Type comments here> cell, type an optional comment.

Note. Comments associated with visits do not print on the Treatment Plan report.

- 8 Click  to add a procedure.

You see the procedure entry section. DAISY automatically associates the procedures with the first phase and the first visit.

Type procedures into the procedure entry section





9 In the Proc. column, do one of the following:

- Type the appropriate procedure code.
- Click , search for the appropriate procedure code, then double-click the code you want.

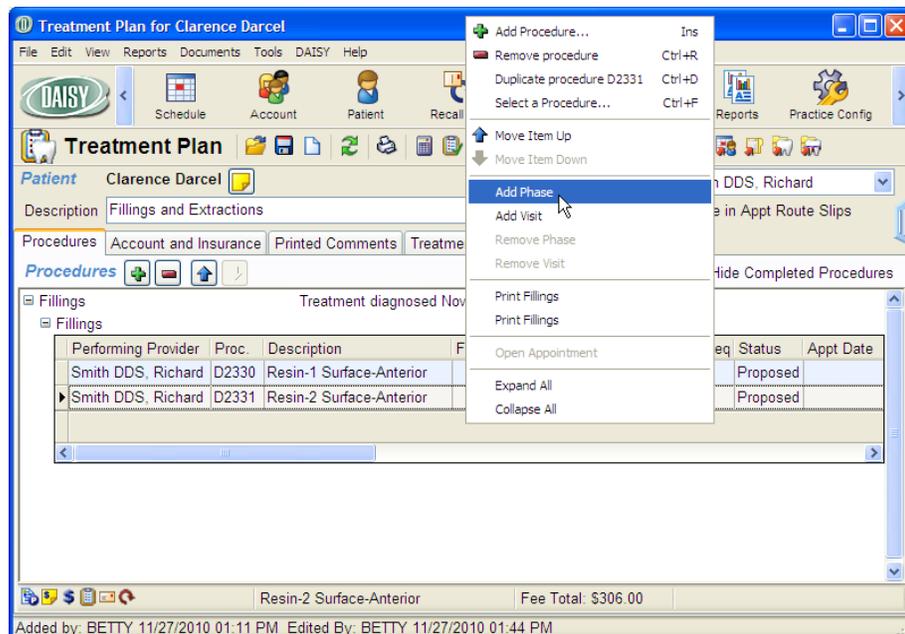
10 When appropriate, fill in the Tooth, Surface, and Quad columns.

DAISY automatically fills in the procedure's description, fee, and duration.

11 To enter additional procedures, repeats steps 8 through 10.

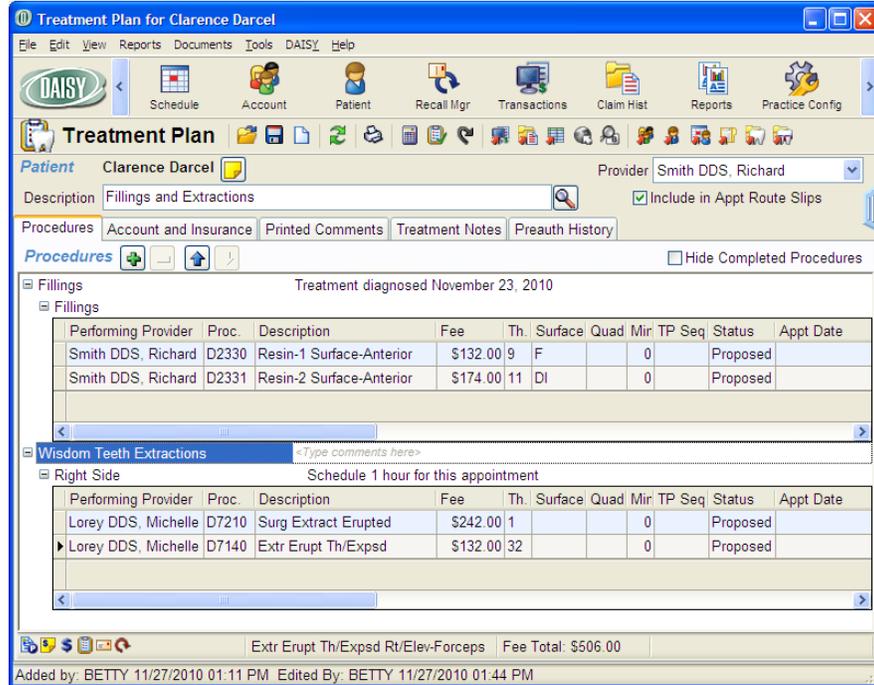
Note. You can also generate treatment plans from the Chart window in DAISY Chart. All treatment is initially placed in Phase 1, Visit 1 by default.

12 To create another phase, right-click in the Procedures section and select Add Phase.

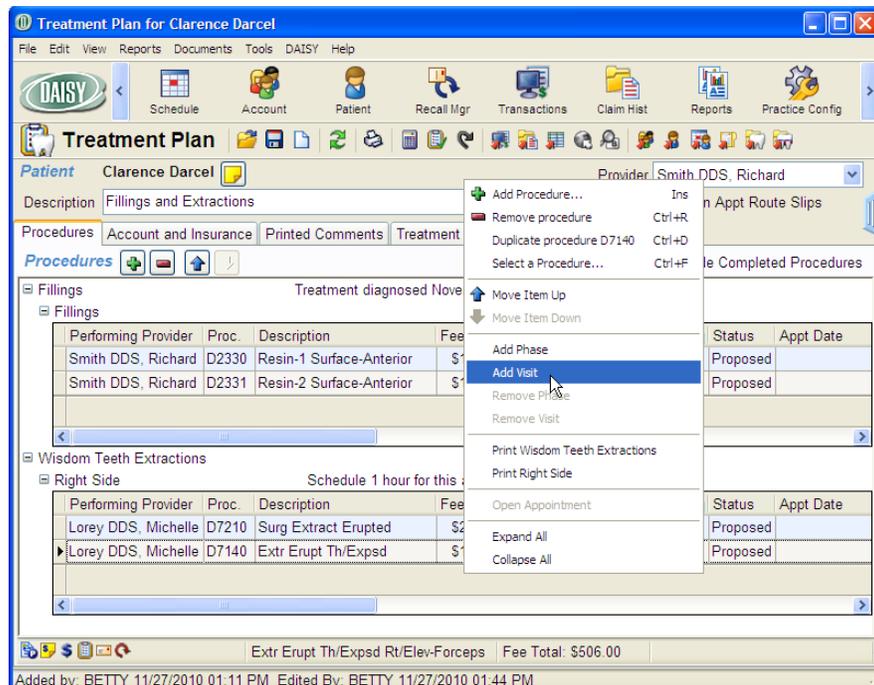


13 Repeat steps 7 through 11 to finish entering treatment for the first visit of this next phase.

For example, name the next phase Wisdom Teeth Extractions, and enter the information for the extractions visit.



14 To add another visit to the Wisdom Teeth Extractions phase, right-click in the phase's Procedures section and select Add Visit.





You see the visit added to the treatment plan tree under the appropriate phase.

Treatment Plan for Clarence Darcel

File Edit View Reports Documents Tools DAISY Help

Schedule Account Patient Recall Mgr Transactions Claim Hist Reports Practice Config List Main

Treatment Plan

Patient: Clarence Darcel Provider: Smith DDS, Richard

Description: Fillings and Extractions Include in Appt Route Slips

Procedures Account and Insurance Printed Comments Treatment Notes Preauth History

Procedures Hide Completed Procedures

Fillings Treatment diagnosed November 23, 2010

Fillings

Performing Provider	Proc.	Description	Fee	Th.	Surface	Quad	Mir.	TP	Seq	Status	Appt Date
Smith DDS, Richard	D2330	Resin-1 Surface-Anterior	\$132.00	9	F			0		Proposed	
Smith DDS, Richard	D2331	Resin-2 Surface-Anterior	\$174.00	11	DI			0		Proposed	

Wisdom Teeth Extractions

Right Side Schedule 1 hour for this appointment

Performing Provider	Proc.	Description	Fee	Th.	Surface	Quad	Mir.	TP	Seq	Status	Appt Date
Lorey DDS, Michelle	D7210	Surg Extract Erupted	\$242.00	1				0		Proposed	
Lorey DDS, Michelle	D7140	Extr Erupt Th/Expsd	\$132.00	32				0		Proposed	

Visit 2 <Type comments here>

Surg Extract Erupted Fee Total: \$506.00

Added by: BETTY 11/27/2010 01:11 PM Edited By: BETTY 11/27/2010 01:44 PM

Click "Visit 2" to rename the visit

15 Click the visit label and type a name for the visit. For example, click Visit 2 and type Left Side.

16 To enter procedures for this visit, repeat steps 8 through 11.

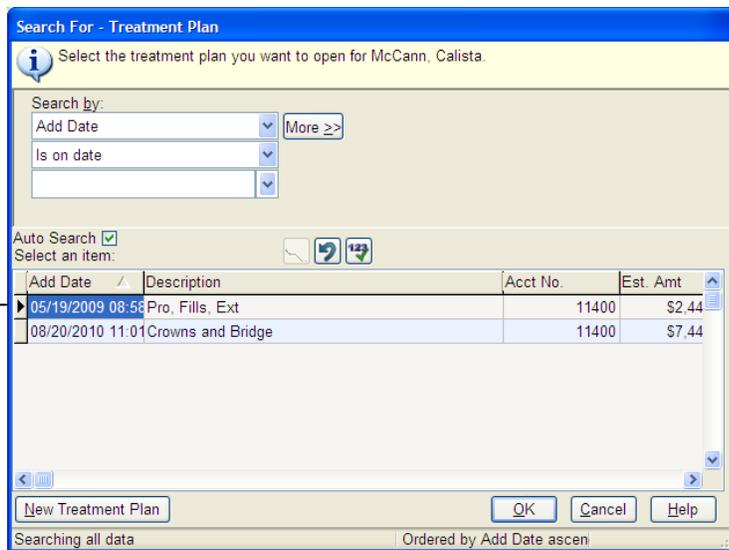
17 Click  to save the treatment plan.

Modify a treatment plan

◆ To modify a treatment plan:

- 1 From the DAISY toolbar, click .
- 2 Search for and select the patient you want, then click OK.
- 3 Click .
- 4 Do one of the following:
 - If the patient has one treatment plan, the Treatment Plan window opens. Go to step 5.
 - If the patient has two or more treatment plans, the Search For – Treatment Plan window opens. Select the treatment plan, then click OK.

Use the Add Date column to help select the correct treatment plan



Add Date	Description	Acct No.	Est. Amt
05/19/2009 08:58	Pro, Fills, Ext	11400	\$2,44
08/20/2010 11:01	Crowns and Bridge	11400	\$7,44

Note. If the patient does not have a treatment plan, DAISY creates a new treatment plan.

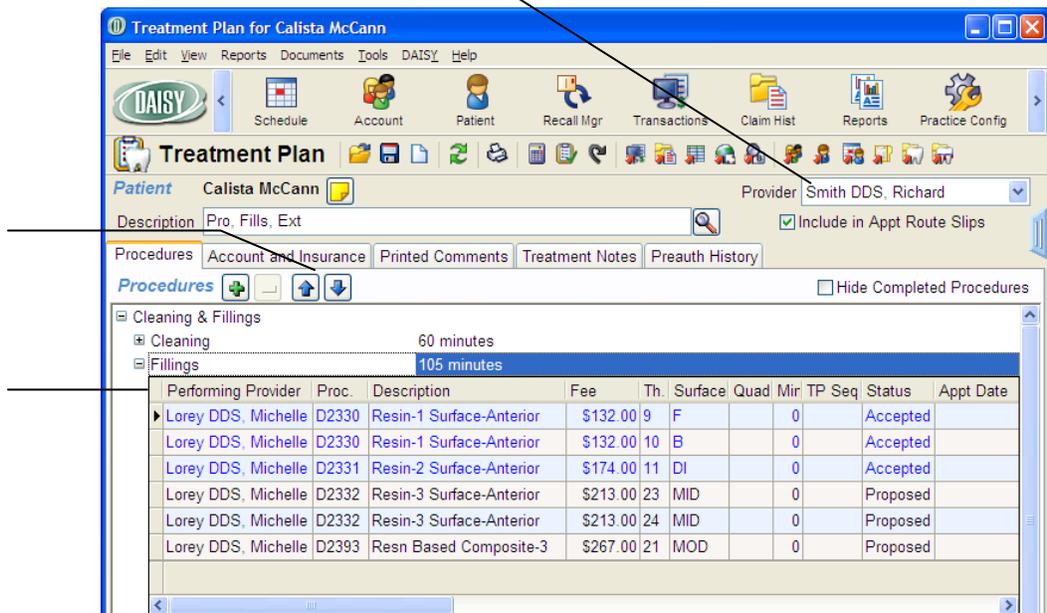


You see the Treatment Plan window.

Use this drop-down list to select a different provider

Use the arrows to reorder phases and visits on the treatment plan

To sort column contents, click the appropriate column heading



5 Modify the treatment plan as needed.

- To change the provider (which is the default provider associated with this patient’s account), select the provider from the Provider drop-down list. Provider information is pulled in from the Provider window. This provider’s name and address displays on the Treatment Plan report.
- To add treatment plan phases, visits, or procedures, see “Create a treatment plan” on page 17.
- To edit a procedure, click the appropriate procedure cell, then type or select the new information.
- To delete a procedure, see “Remove treatment plan information” on page 25.
- To move or reorder treatment plan information, see “Move or reorder treatment plan information” on page 24.

6 Click  to save the treatment plan.

Move or reorder treatment plan information

◆ **To move a visit or phase:**

- 1 **Open the treatment plan.**
- 2 **Click the phase or visit label name and hold down the mouse button.**
- 3 **Drag the phase or visit to the location you want, then release the mouse button.**
Visits associated with a phase move with it.
- 4 **Click  to save the treatment plan.**

◆ **To move a procedure to another phase or visit:**

- 1 **Open the treatment plan.**
- 2 **Do one of the following:**
 - Select the procedure and click the up/down arrow ( ).
 - Select the procedure and hold down the primary mouse button. Drag the procedure to the location you want, then release the primary mouse button.
 - To move more than one procedure at a time, press the <Ctrl> key and click each procedure you want to select, then either drag and drop the procedures to another visit or phase, or use the up/down arrows ( ) to move the selected procedures.
- 3 Click  to save the treatment plan.

Remove treatment plan information

◆ **To remove a phase from a treatment plan:**

- 1 **Open the treatment plan.**
- 2 **Right-click the phase label, then select Remove Phase.**
- 3 **In the Confirm dialog box, click OK.**

All visits associated with the phase are also removed.

Note. At least one phase is required for all treatment plans. To remove the last phase, delete the treatment plan.

◆ **To remove a visit from a treatment plan:**

- 1 **Open the treatment plan.**
- 2 **Right-click the visit label, then select Remove Visit.**
- 3 **In the Confirm dialog box, click OK.**

All procedures associated with visit are also removed.

Note. At least one visit is required for each phase. To remove the last visit, delete the phase.

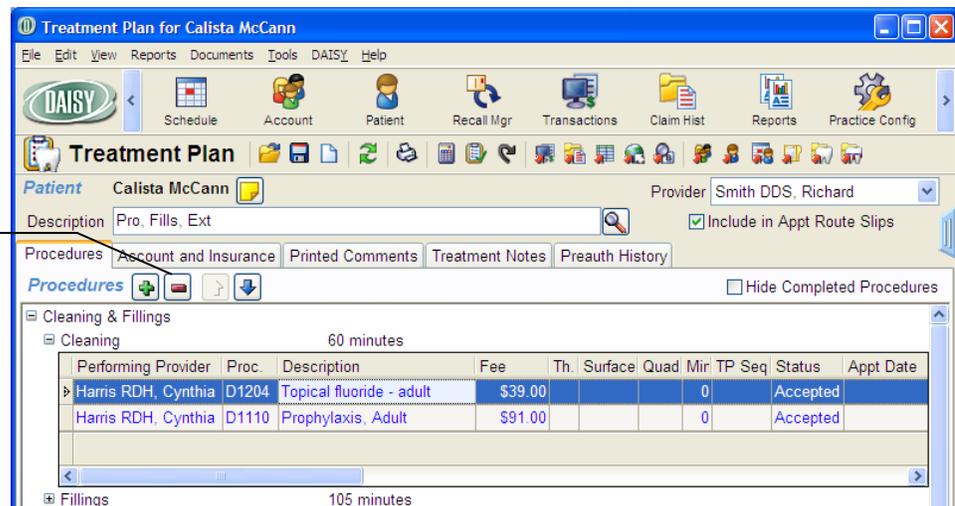


◆ **To remove a procedure from a treatment plan:**

- 1 **Open the treatment plan.**
- 2 **Click to expand the phase and visit tree to view the procedure.**
- 3 **Right-click the procedure description, then select *Remove procedure code*.**

Procedure code is the code number of the selected procedure, such as D1204.

To delete a procedure, you can also select the procedure, then click here



Print a treatment plan

You can print the following with or without individual fees:

- The entire treatment plan
- Individual phases and their associated visits
- Specific visits within a phase
- One or more procedures

Print a treatment plan with fees

In this example, the front office wants to print a complete treatment plan, including all phases and visits.

◆ **To print a complete treatment plan with fees:**

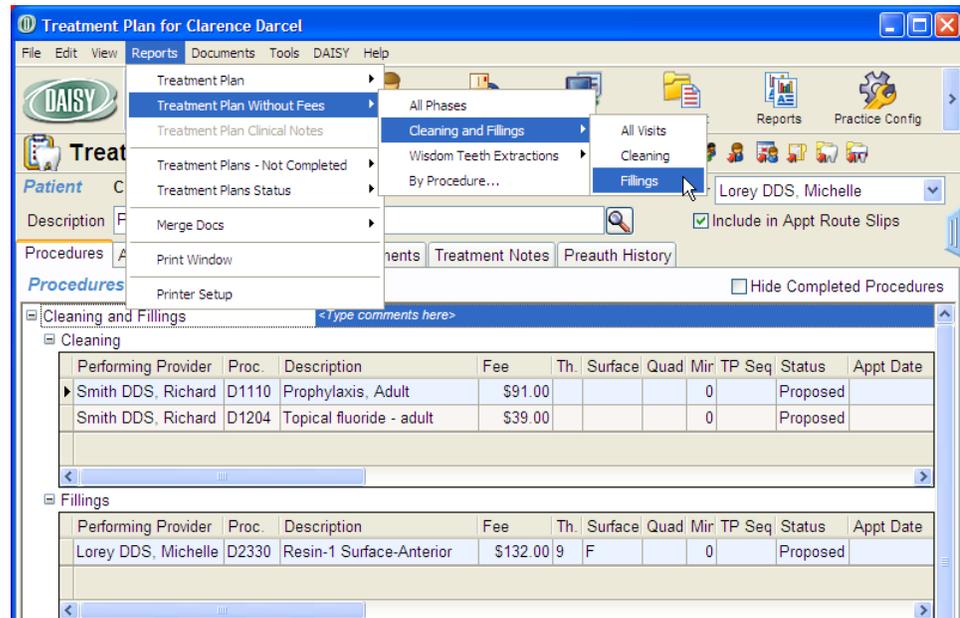
- 1 **Open the Treatment Plan window.**
- 2 **Do one of the following:**
 - Click  to print the entire treatment plan.
 - From the Reports menu, select Treatment Plan, then select All Phases.

Print a specific phase of a treatment plan

In this example, the front office wants to print a specific phase of a treatment plan, excluding fees. The phase name is Cleaning and Fillings, and the Visit name is Fillings.

◆ **To print a specific phase of a treatment plan, excluding individual fees:**

1 Open the Treatment Plan window.



2 From the Reports menu, select Treatment Plan Without Fees, then select *phase name*, then select *visit name*.

For example, select the phase name Cleanings and Fillings, then select the visit name Fillings.

3 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.

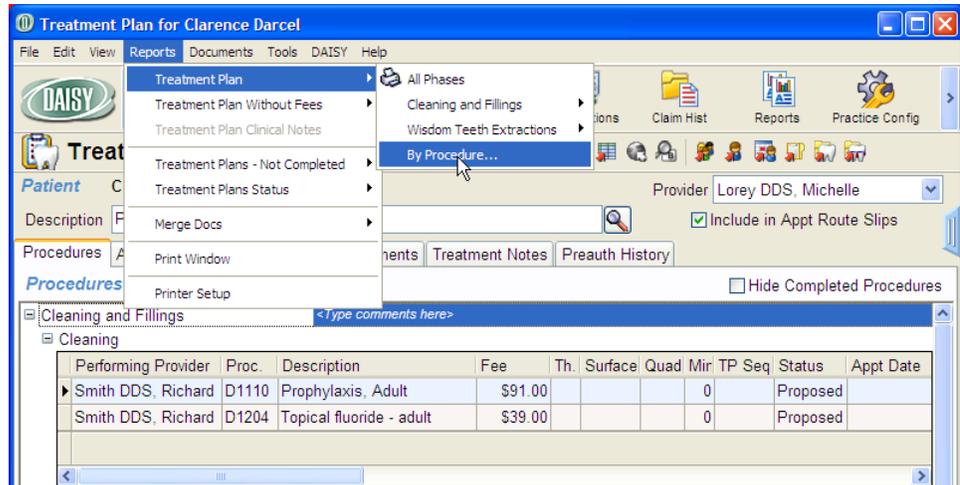


Print selected procedures in a treatment plan

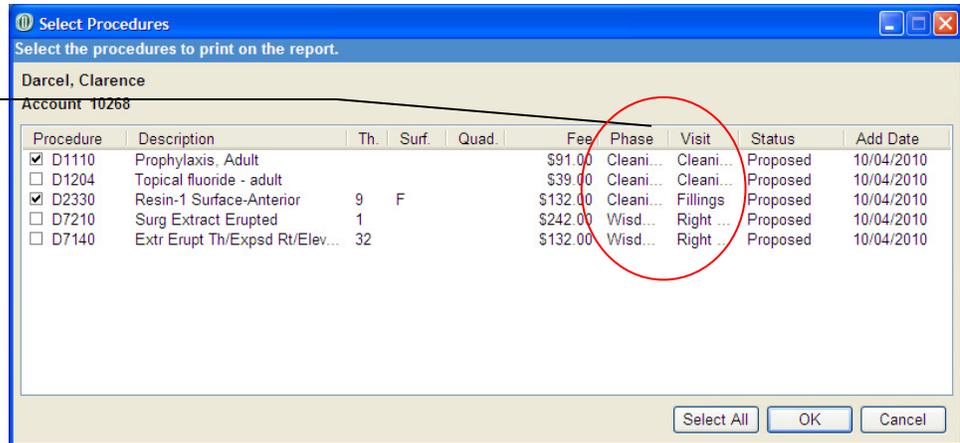
In this example, the front office wants to print only selected procedures in a treatment plan, including fees.

◆ **To print selected procedures, including fees:**

- 1 **Open the Treatment Plan window.**
- 2 **From the Reports menu, select Treatment Plan, then select By Procedure.**



- 3 **Place a check mark next to each procedure to print, then click OK.**



Procedures display in order of treatment plan, phase, visit, and procedure

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.

You see the report with the selected treatment plan procedures and fees.

Provider information and office location is pulled in from the Provider window

Financial and insurance information is now below treatment information

The printed comments section can now be any length

Treatment Plan							Centerpointe Dental Center	
Prophy, Fillings, and Extractions								
Patient Info			Account Info			Provider Info		
Clarence Darcel			Account # 10268			Michelle P Lorey DDS		
13223 SE 282nd Ave			Guar. #1: Clarence Darcel			2039 NE 128th Ave		
Boring, OR 97009						Portland, OR 97220		
Home: (503) 826-6341						(503) 483-6383		
Proposed Treatment								
Cleaning and Fillings								
Cleaning								
Code	Description	Tooth	Surface	Quad	Fee	Pri Ins Est (In/Ded)	Pat Resp.	
D1110	Prophylaxis, Adult				\$91.00	\$91.00 N	\$0.00	
Visit Sub-Total:					\$91.00	\$91.00	\$0.00	
Fillings								
Code	Description	Tooth	Surface	Quad	Fee	Pri Ins Est (In/Ded)	Pat Resp.	
D2330	Resin-1 Surface-Anterior	9	F		\$132.00	\$65.60 Y	\$66.40	
Visit Sub-Total:					\$132.00	\$65.60	\$66.40	
Phase Sub-Total:					\$223.00	\$156.60	\$66.40	
Financial Summary Estimate								
Total Fees:				\$223.00				
Estimated Primary Insurance				\$156.60				
Estimated Secondary Insurance				\$0.00				
Provider Discount				\$0.00				
Estimated Patient Responsibility				\$66.40				
Insurance Information								
Subscriber: Clarence Darcel				Primary Insurance				
Group No: NUR711								
Ins. Company: ADVANTAGE DENTAL PLAN INC								
Insurance Plan: Reardon Nursery Plan								
Annual Max:	\$1,500.00	Used:	\$0.00					
Remaining:	\$1,500.00							
Deductibles:			Paid:	0.00				
Patient:	\$50.00	Remaining:	\$50.00					
Comments:								
Treatment plans are valid for 90 days.								
* THIS IS ONLY AN ESTIMATE OF CHARGES AND INSURANCE PAYMENT. IT IS SUBJECT TO MODIFICATION DEPENDING ON UNFORESEEN OR UNDIAGNOSABLE CIRCUMSTANCES THAT MAY ARISE DURING THE COURSE OF TREATMENT. PATIENTS WHO CARRY DENTAL INSURANCE UNDERSTAND THAT ALL SERVICES WILL BE CHARGED DIRECTLY TO THE PATIENT. IT IS UNDERSTOOD THAT THE PATIENT RESPONSIBLE PARTY AGREES TO BE FULLY RESPONSIBLE FOR PAYMENT OF SERVICES.								
Signature of Responsible Party							Date	
Copyright 2010 DAISS Version 4.0 Printed: 10/03/2010 09:26PM Report: 2002							Page 1	



Generate treatment plan reports

In DAISY 4.0, treatment plan reports have been completely redesigned.

In previous versions of DAISY, treatment plan status reports (Tx Plan Status by Patient and Tx Plan Status by Provider) could only be filtered by patient or by provider. Now you can filter treatment plan procedures by whether or not they are scheduled or unscheduled and whether or not the patient has benefits remaining.

Note. Procedures attached to an appointment have a status of “accepted.”

In addition, the Tx. Plan Proc. Not Done report has three new parameter tabs:

- Tx Plan Add Date allows you to filter by the date that unscheduled treatment plans were added.
- Proc. Add Dt allows you to filter by the date that unscheduled treatment plan procedures were added.
- Tx Plan Provider allows you to filter by treatment plan provider.

View scheduled treatment plans

◆ **To view the status of all scheduled treatment plans:**

- 1 **Open the Treatment Plan window.**
- 2 **Do one of the following:**
 - To generate a summary report of scheduled treatment plan procedures, from the Reports menu, select Treatment Plan Status, then select Scheduled.
 - To generate a detailed report of scheduled treatment plans, from the Reports menu, select Treatment Plans – Not Completed, then select Scheduled.

You see a report containing all scheduled treatment plans.

View patients with unscheduled treatment plans

◆ **To view a list of patients with unscheduled treatment plan procedures:**

- 1 **Open the Treatment Plan window.**
- 2 **Do one of the following:**
 - To generate a summary report of unscheduled treatment plan procedures, from the Reports menu, select Treatment Plan Status, then select Unscheduled.
 - To generate a detailed report of scheduled treatment plans, from the Reports menu, select Treatment Plans – Not Completed, then select Unscheduled.

You see a report containing all unscheduled treatment plans.

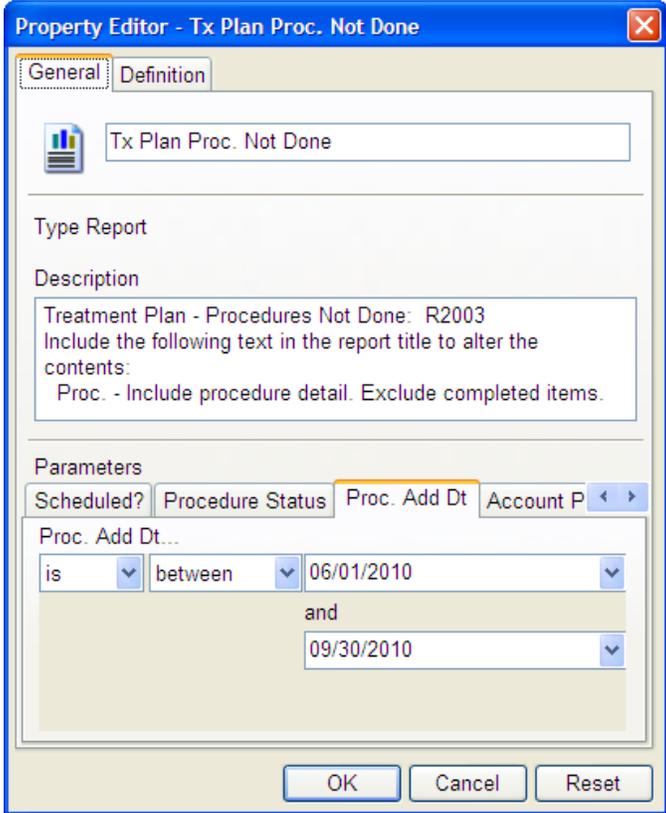
Note. Additional treatment plan status reports are available from the Report Gallery under the Treatment Plans folder.

View unscheduled treatment for a range of dates

In this example, the office wants to view all unscheduled procedures planned between 6/1/2010 and 9/30/2010.

◆ **To view a report of patients with unscheduled treatment plan procedures for a range of dates:**

- 1 From the DAISY toolbar, click , then double-click the Treatment Plans folder.
- 2 Right-click the TX Plan Proc. Not Done report and select Properties.
- 3 Click Reset to remove any filtering from the last time you ran the report.
- 4 In the Parameters section, select the Scheduled? tab.
- 5 Set the filters to Is Equal to N.
- 6 In the Parameters section, select the Proc. Add Dt tab.
- 7 Set the filters to Is Between, and type the date range.



Property Editor - Tx Plan Proc. Not Done

General Definition

Tx Plan Proc. Not Done

Type Report

Description

Treatment Plan - Procedures Not Done: R2003
Include the following text in the report title to alter the contents:
Proc. - Include procedure detail. Exclude completed items.

Parameters

Scheduled? Procedure Status Proc. Add Dt Account P < >

Proc. Add Dt...

is between 06/01/2010 and 09/30/2010

OK Cancel Reset

- 8 Click OK to save the filter setting.



9 Double-click the TX Plan Proc. Not Done report.

You see all treatment plan procedures added between 06/01/2010 and 9/30/2010 that have not been scheduled.

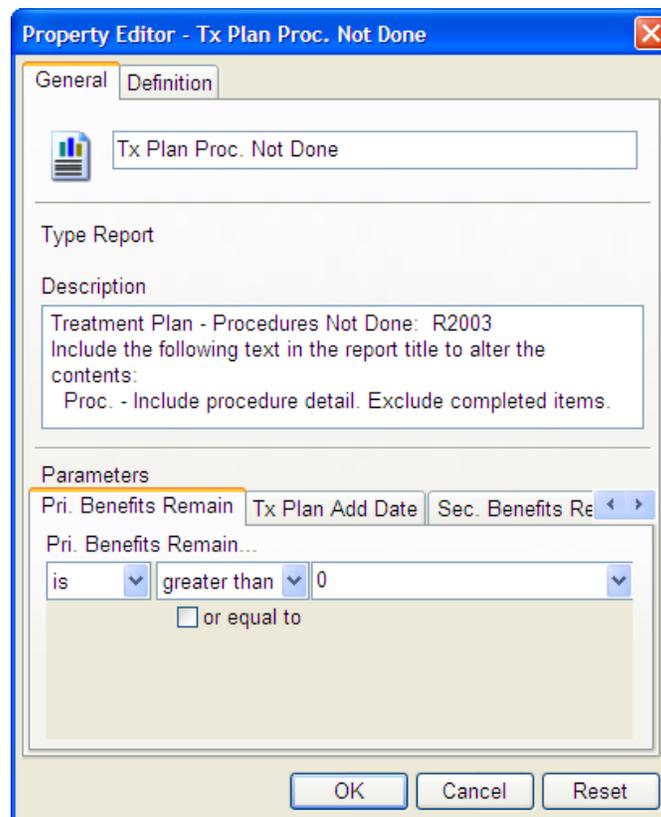
Report: 2003		Tx Plan Proc. Not Done					
Darcel, Clarence		Age: 53	Acct: 10268	Bal: \$1,526.00		<u>Pri. Ins.</u>	
13223 SE 282nd Ave		Home: (503) 826-6341	Last Svc: 01/24/06		Ben. Remaining:	\$1,500.00	
Boring, OR 97009		Work:	Next Svc:		Deduct. Remaining:	\$50.00	
					Annual Max	\$1,500.00	
Treatment Proposed: 10/04/10		Prophy, Fillings, and Extractions					
Procedure	Description	Status	Fee	Pri. Est	Sec. Est	Est. Pat. Resp.	
D1110	Prophylaxis, Adult	Proposed	91.00	91.00		0.00	
D1204	Topical fluoride - adult	Proposed	39.00	39.00		0.00	
D2330	Resin-1 Surface-Anterior	Proposed	132.00	65.60		66.40	
D7210	Surg Extract Erupted	Proposed	242.00	193.60		48.40	
D7140	Extr Erupt Th Expsd Rt/Elev-Fc	Proposed	132.00	105.60		26.40	
Total			\$636.00	\$494.80		\$141.20	
McCann, Calista		Age: 42	Acct: 11400	Bal: \$836.00		<u>Pri. Ins.</u>	
678 NW Banff Dr		Home: (503) 666-1493	Last Svc: 07/20/10		Ben. Remaining:	\$2,000.00	
Portland, OR 97229		Work:	Next Svc: 01/19/11		Deduct. Remaining:	\$25.00	
					Annual Max	\$2,000.00	
Treatment Proposed: 08/20/10		Crowns and Bridge					
Procedure	Description	Status	Fee	Pri. Est	Sec. Est	Est. Pat. Resp.	
D2740	Crown, Porc/Ceram Substr	Proposed	979.00	477.00		502.00	
D2740	Crown, Porc/Ceram Substr	Proposed	979.00	489.50		489.50	
Total			\$1,958.00	\$966.50		\$991.50	
Grand Totals:			2 Proposals	\$2,594.00		\$0.00	0 %
Averages per Proposal:				\$1,297.00		\$0.00	
<div style="border: 1px solid black; padding: 2px; display: inline-block;"> Note: Percent Completed refers to the percent of fees pertaining to completed procedures </div>							

View patients with outstanding treatment and remaining benefits

In this example, the office wants to view all patients with outstanding treatment who have remaining benefits.

◆ **To view a report of patients with treatment plan procedures not completed for a range of dates:**

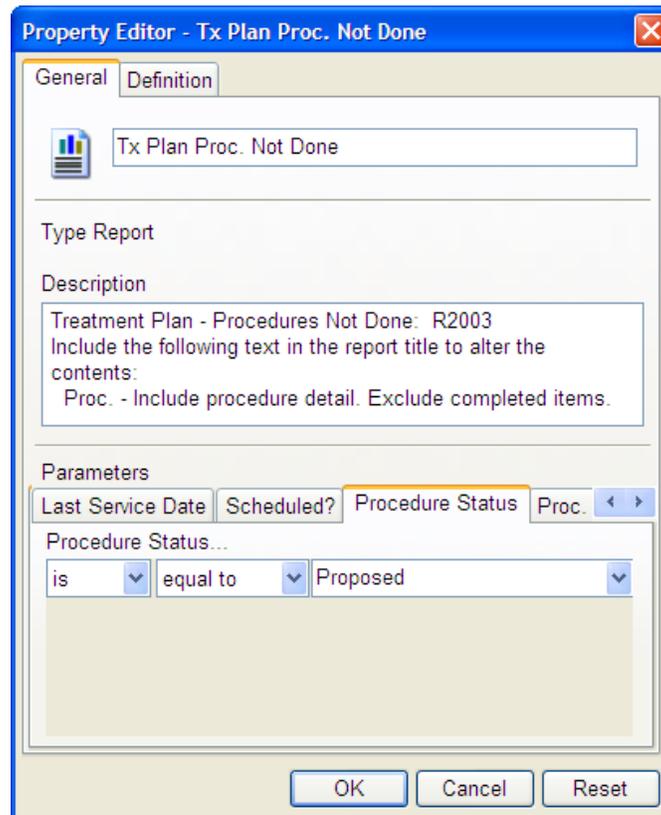
- 1 From the DAISY toolbar, click , then double-click the Treatment Plans folder.
- 2 Right-click the TX Plan Proc. Not Done report and select Properties.
- 3 Click Reset to remove any filtering from the last time you ran the report.
- 4 In the Parameters section, select the Pri. Benefits Remain tab.



- 5 Set the filters to Is Greater Than 0.



- 6 In the Parameters section, select the Procedure Status tab.



- 7 Set the filters to Is Equal to Proposed.
 8 Click OK to save the filter settings.
 9 Double-click the TX Plan Proc. Not Done report.

You see all patients with outstanding treatment who have remaining benefits

Delete a treatment plan

◆ To delete a treatment plan:

- 1 From the DAISY toolbar, click .
- 2 Search for and select the patient you want, then click OK.
- 3 Click .
- 4 Do one of the following:
 - If the patient has one treatment plan, the Treatment Plan window opens. Go to step 5.
 - If the patient has two or more treatment plans, the Search For – Treatment Plan window opens. Select the treatment plan, then click OK.

- 5 From the File menu, select Delete.
- 6 In the Confirm dialog box, click OK.

Note. The treatment plan is not deleted from the database; it is changed to inactive.

Manage planned treatment from the patient chart

If a patient has multiple treatment plans, you can choose which planned treatment to display on the patient's chart using the revised Planned Treatment display option. Tooth graphics and treatment history display treatment associated only with the selected treatment plan.

The Planned Treatment display setting also affects how you enter treatment if the patient has more than one treatment plan.

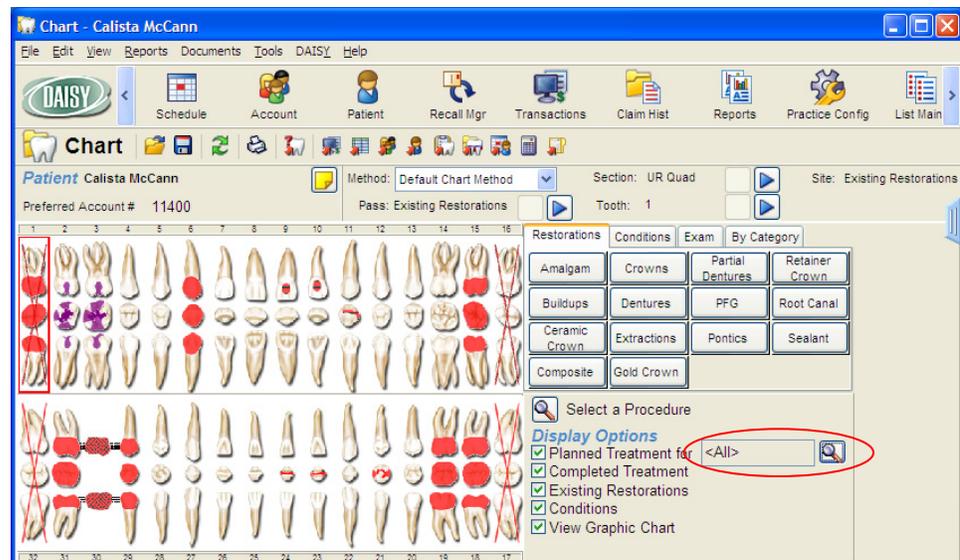
View planned treatment from the patient chart

If a patient has multiple treatment plans, you can choose which planned treatment to display on the patient's chart. When you first open a patient chart, the Planned Treatment defaults to <All>, which displays all planned treatment for the patient.

◆ To display selected treatment for this patient:

- 1 From the DAISY toolbar, click .
- 2 Search for and select the patient you want, then click OK.
- 3 In the Patient window, click  to open a chart for this patient.

By default, you see all planned treatment for the patient.



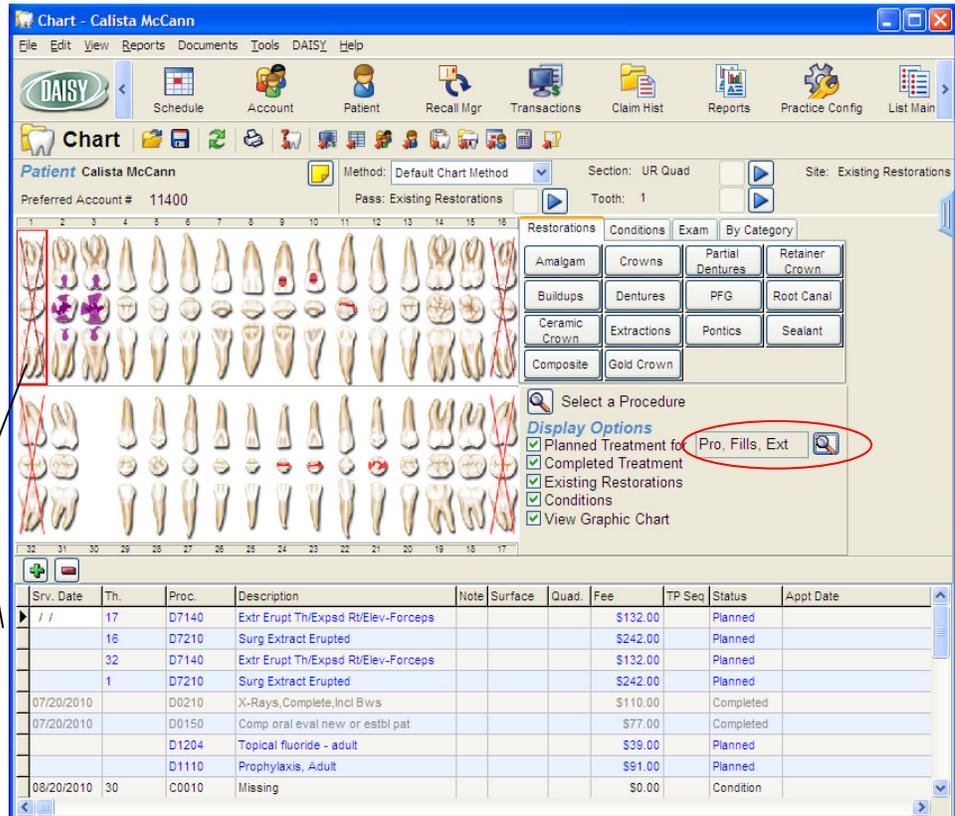
- 4 To the right of the Planned Treatment check box, click .



- In the Search for –Treatment Plan window, select the treatment plan you want, then click OK.**

In the following example, the hygienist selected the patient’s Pro, Fills, Ext treatment plan. You only see the treatment associated with this plan in both the tooth graphics section and the treatment history section of the window.

Tooth graphics and treatment history display only treatment associated with the selected plan



Modify a treatment plan from the patient chart

The Planned Treatment display setting also affects how you enter treatment if the patient has more than one treatment plan, and the Planned Treatment display option is set to <All>. DAISY will ask you to select which plan to add the treatment to, but only the *first* time you enter a procedure.

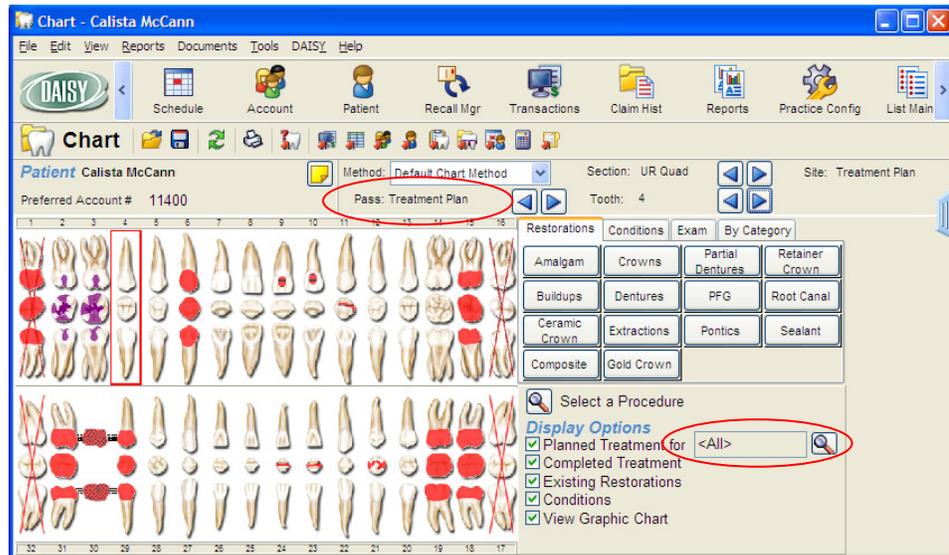
In this example, the patient has two treatment plans. The dentist wants to add a ceramic crown for tooth 4 to the Crowns and Bridge treatment plan.

- ◆ **To modify a treatment plan from the patient chart:**
 - From the DAISY toolbar, click .**
 - Search for and select the patient you want, then click OK.**
 - In the Patient window, click to open a chart for this patient.**

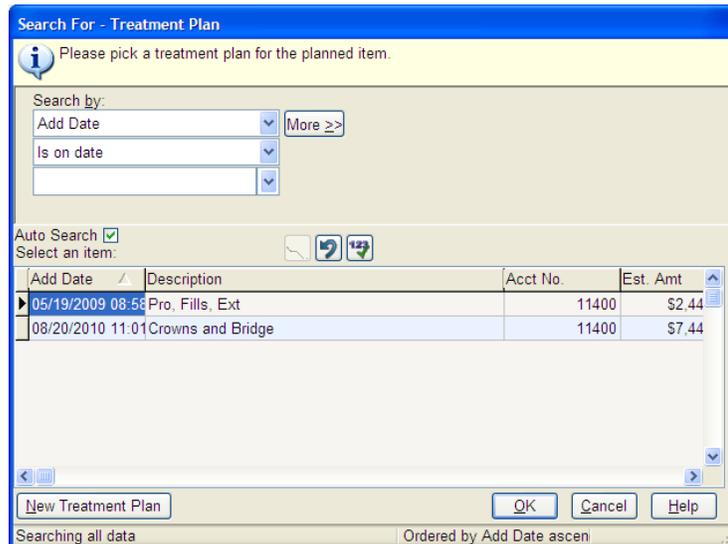
By default, you see the entire patient’s planned treatment.

- 4 In the Pass navigation area, click the appropriate   buttons to select the Treatment Plan pass.

In this example, the pass has been set to Treatment Plan, and the Planned Treatment display option is set to <All> by default.

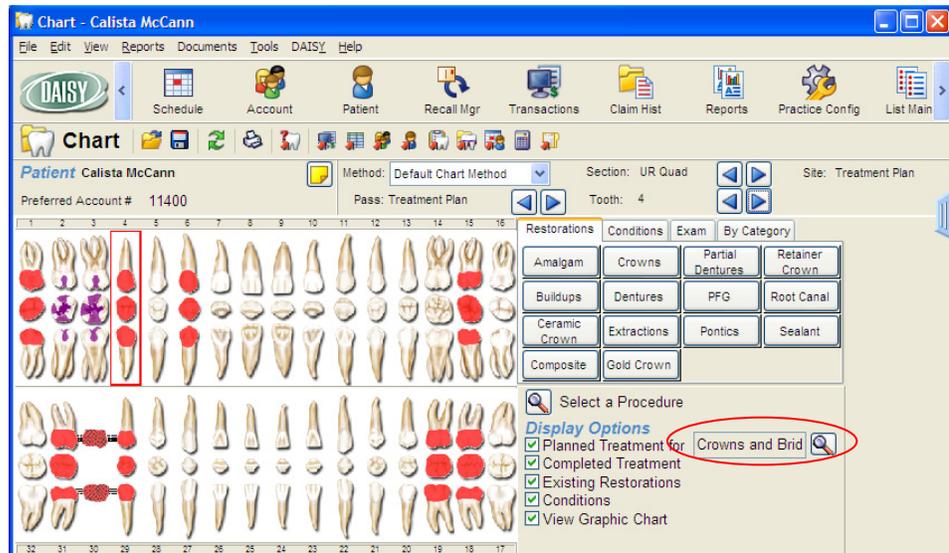


- 5 Click tooth 4, then click Ceramic Crown.
 You see the Search For – Treatment Plan window.
- 6 Select the treatment plan and click OK.





The Planned Treatment display option changes to the selected treatment plan, the tooth graphics section changes to display treatment associated with the plan, and the crown is added to tooth 4.



7 Click  and close the Chart window.

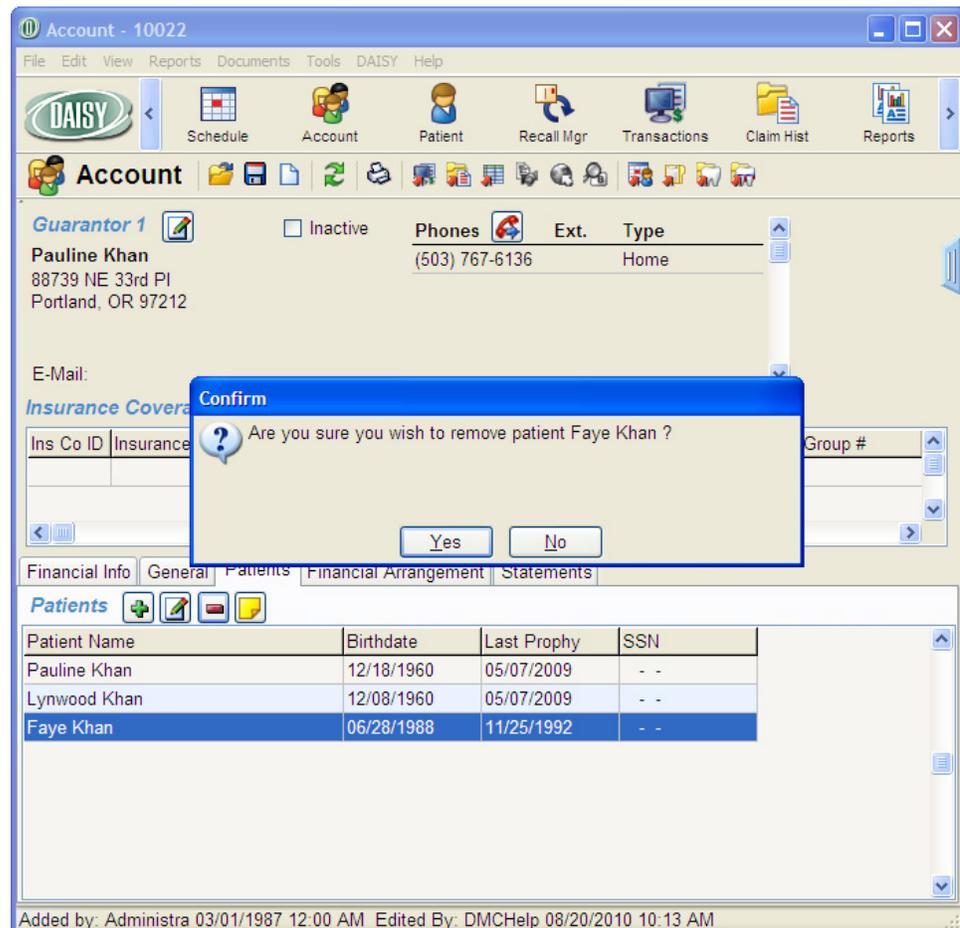
Migrate the patient treatment plan to a new account

In DAISY 4.0, when a patient is moved to a different account, the patient's treatment can be migrated to the new account as well. The patient must either be moved to an existing account, or you must create the account before you move the patient.

In this example, the patient will be moved to an existing account.

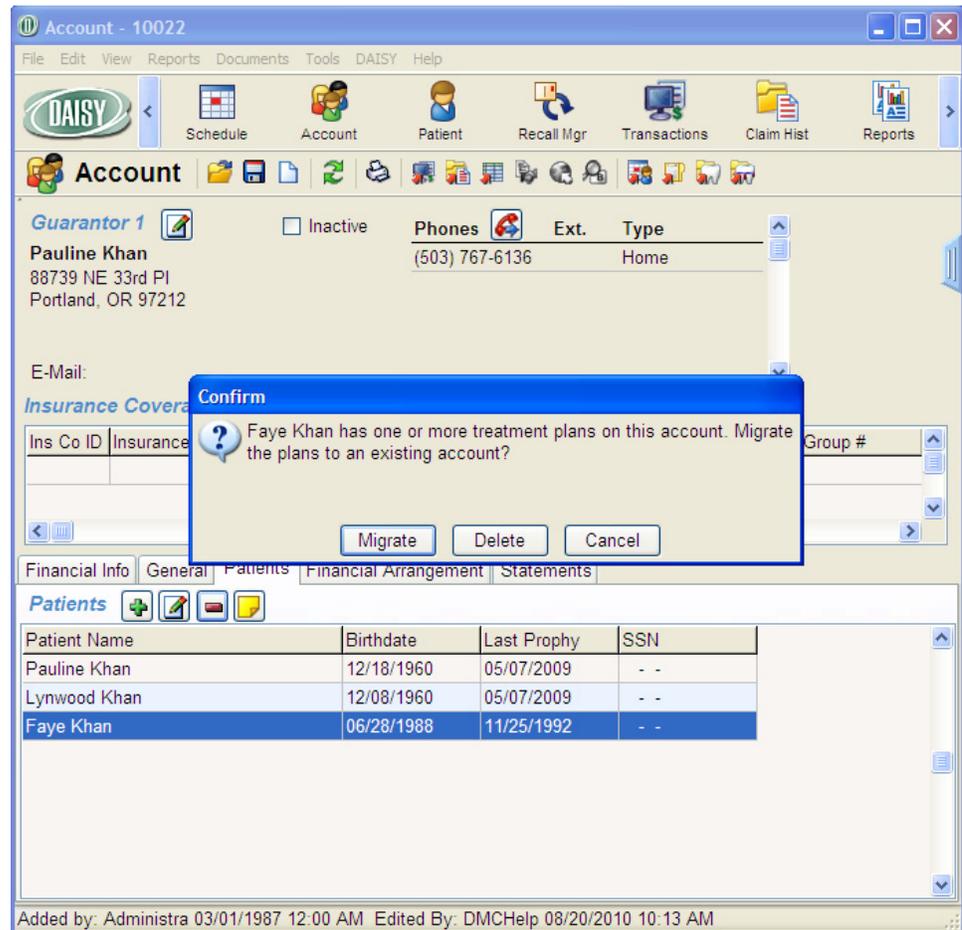
◆ To migrate a patient's treatment plan:

- 1 From the DAISY toolbar, click .
- 2 Search for and select the patient's current account, then click OK.
- 3 Click the Patients tab.
- 4 Select the patient and click .
- 5 In the Confirm dialog box, click Yes.





6 In the next Confirm dialog box, click Migrate.



7 Search for and select the patient’s new account, then click OK.

The patient and all associated treatment plans are moved to the new account.

CHAPTER 4

Use AutoRemind

DAISY 4.0 introduces a new add-on that uses a partner service called AutoRemind, which enables dental offices to automatically remind patients of upcoming appointments, resulting in fewer missed appointments and a more consistent revenue stream for your practice. Reminders can be communicated by phone, e-mail, or SMS text.

This new service is fully integrated with DAISY. Database synchronization between the two programs takes place automatically every hour. This synchronization sends the latest appointment information to AutoRemind and updates the confirmation status in the DAISY schedule.

With AutoRemind, you can decide when and how to send reminders. You can also customize the look of your e-mail reminder messages using your practice logo or another appropriate image.

You use reminder schemes to define a strategy for sending reminders to patients who have upcoming appointments. DAISY provides the ability to create and name multiple reminder schemes so you can set up customized strategies for different types of patients or for individual patients.

For more information about subscribing to this service, contact DAISY Sales at 503.765.3471 or daisysales@dmcdental.com.



Set up AutoRemind

Before you can use AutoRemind, you need to set up this service for your practice by:

- Registering for the AutoRemind service via the Internet.
- Setting up the AutoRemind connection in DAISY.

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

- Configuring your office's AutoRemind profile on the AutoRemind web site.
- Assigning AutoRemind access permissions for DAISY users.
- Setting up the reminder schemes your office wants to use to send reminders to patients.

Register for the AutoRemind service

◆ **To register for the AutoRemind service:**

- 1 Go to www.AutoRemind.us/trial.
- 2 Follow the instructions to sign up for an AutoRemind trial account.
- 3 Record the username and password you used to set up the account.

Within three days, your AutoRemind account information will be sent to Dentists Management Corporation (DMC), and you will receive an e-mail message that DMC has received this information. A DAISY representative will contact you to help you configure AutoRemind for your practice.

Set up the AutoRemind connection

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

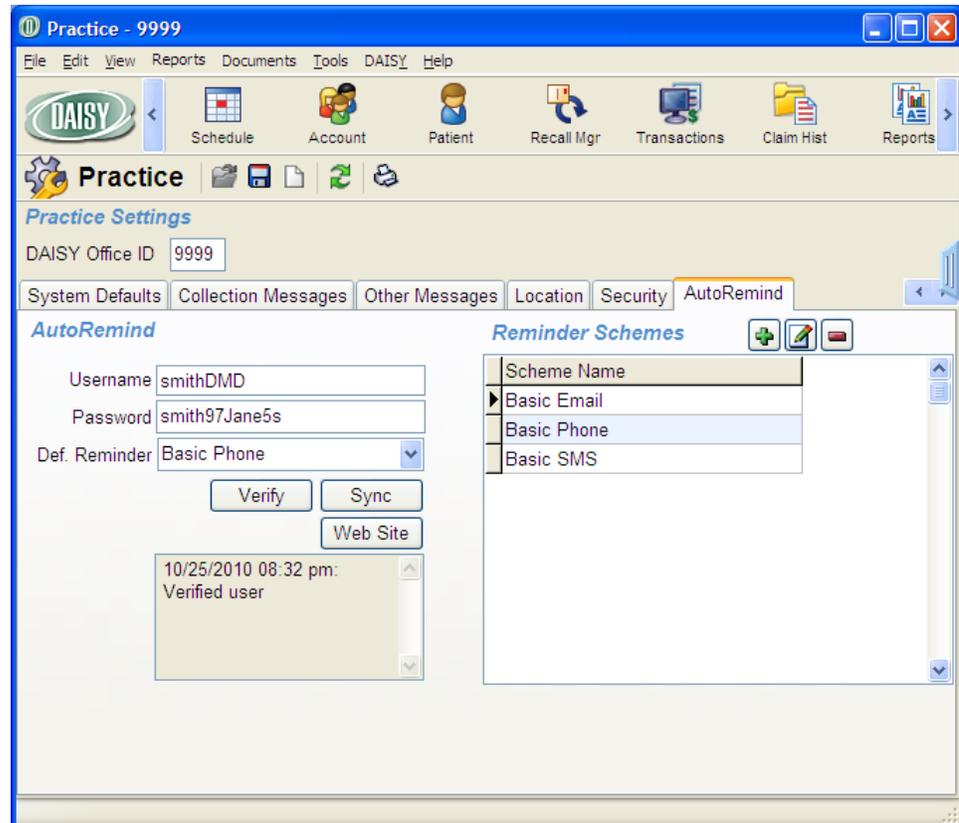
◆ **To set up the AutoRemind connection:**

- 1 From the DAISY menu, select **Configure**, then **Practice Config**.
- 2 Click the **AutoRemind** tab.
- 3 In the **Username** text box, type your AutoRemind username.
- 4 In the **Password** text box, type your AutoRemind password.
- 5 In the **Def Reminder** drop-down list, select the default reminder scheme.

For more information about reminder schemes, see "Set up a reminder scheme" on page 51.

- 6 Click **Verify** to connect to AutoRemind and verify that the password and username are correct.

DAISY displays the message “*date time*: Verified user” in the text box below the Web Site button.



Once you have connected, you can also use this window to manage your AutoRemind service:

Click this button...	To do this ...
Verify	Verify your AutoRemind connection and download new AutoRemind templates and offset settings
Sync	Send the latest appointment information to AutoRemind and update the confirmation status in the DAISY schedule
Web Site	Log in to the AutoRemind website to configure your reminder profile, monitor messages, and view service announcements



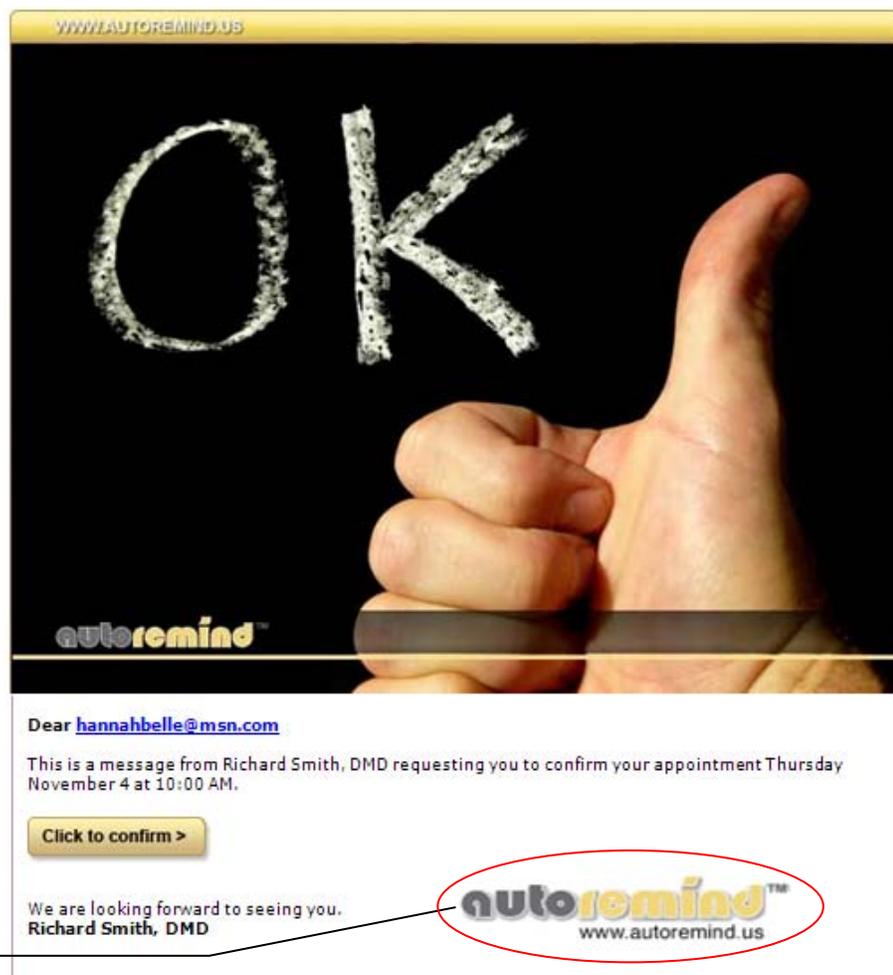
Set up the AutoRemind profile

The AutoRemind profile is managed from the AutoRemind website. Use the My Profile page to:

- Define when AutoRemind should not send out reminder messages. For example, you may not want to send reminders after 8:00 p.m. and before 9:00 a.m.
- Set the maximum number of voice call attempts per appointment.
- Upload a logo or other image to include in e-mail reminders. If you do not upload an image, AutoRemind uses a generic image.

The following is an example of an AutoRemind e-mail message:

From: Richard Smith, DMD [mailto:noreply@autoremind.us]
Sent: Thursday, October 28, 2010 10:04 AM
To: Hannah Campbell
Subject: Confirm appointment with Richard Smith, DMD



Your uploaded logo or other image replaces this generic image

◆ **To set up the AutoRemind profile:**

- 1 **From the DAISY menu, select Configure, then Practice Config.**
- 2 **Click the AutoRemind tab.**
- 3 **Click the Web Site button to open your default web browser and automatically log into your AutoRemind account.**
- 4 **In the top navigation, click the Profile link.**

AutoRemind :: - Windows Internet Explorer

http://backend.autoremind.us/main.php?p

File Edit View Favorites Tools Help

Home Profile Reminder log Message report Log out

My Profile

Company

Tax ID

Address

Zip

City

State

Country U.S.A.

Timezone Pacific Time with DST

E-mail Smith@wcdental.com

Supplier dmcidental

Configure your messages

Block AutoRemind from issuing messages between : PM and : AM

Voice call The maximum number of voice call attempts I allow per appointment are . Multiple calls are made with an hour in between, but only if selected and if voice mail can not be detected.

Email Upload the logo or image that you would like to be included in email reminders:

(Instructions: upload a JPG format file in the size of 200*60 pixels)

Text (email and Text Messages) The company name that will be included in messages will be: Dr Jane Smith
(Instructions: changes to this name can be made in the first field on this page named "Company" located under My Profile)

Internet 100%

Set up the practice's AutoRemind settings here



- 5 **In the Configure Your Messages section, do the following:**
 - Select the time range when AutoRemind should not send reminder messages.
 - Choose the maximum number of voice call attempts to allow per appointment.
 - Optionally upload your practice's logo or other image to include in e-mail reminders. Images must be 200 x 60 pixels and JPG format.

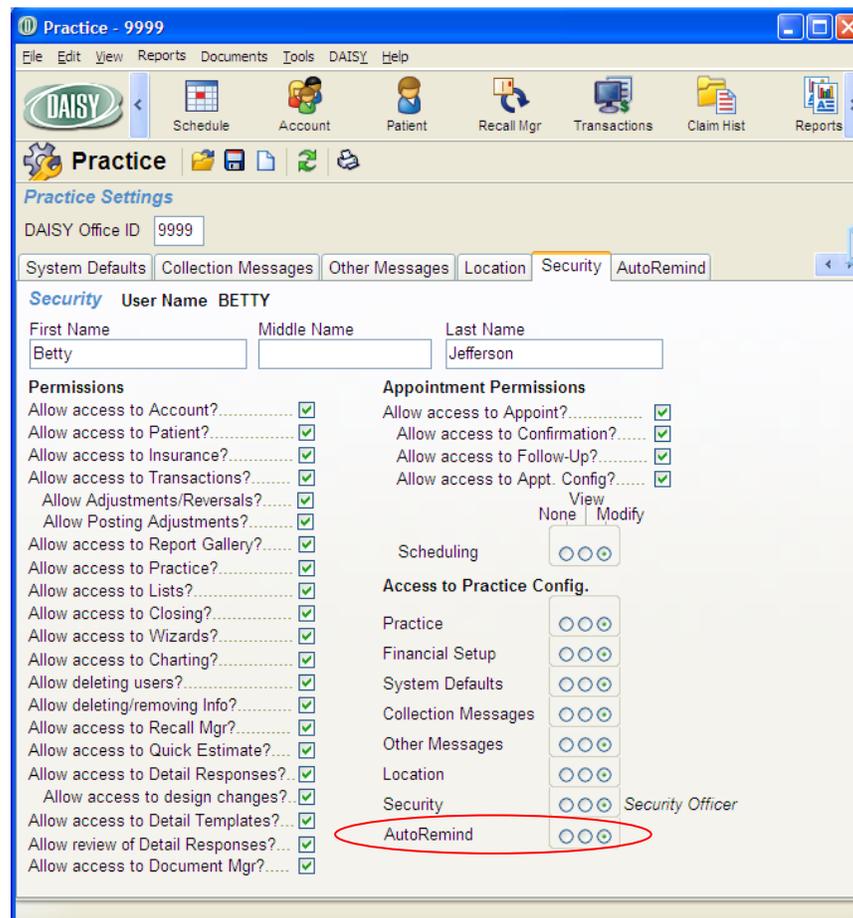
Note. If you do not upload an image, AutoRemind uses a generic image.

- 6 **Click Update and close the browser window.**

Set up access permissions for AutoRemind

- ◆ **To set up a user to modify practice settings for AutoRemind:**
 - 1 **From the DAISY menu, select Configure, then Practice Config.**
 - 2 **Click the Security tab to view your practice's security settings.**

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



- 3 Click  to open the Search For – User window.
- 4 Search for and select the user whose permissions need to be modified.
- 5 Click OK.
- 6 In the Practice window, in the Access to Practice Config. section, change the AutoRemind setting to Modify.
- 7 Click  and close the Practice window.

Synchronize AutoRemind with DAISY

AutoRemind and DAISY need to stay in regular contact with each other to ensure that each has the same appointment and confirmation information.

Database synchronization between the two programs occurs automatically every hour. You can also choose to synchronize AutoRemind manually with your DAISY database.

Synchronization sends the latest appointment information to AutoRemind and updates the confirmation status in the DAISY schedule. In DAISY 4.0, the confirmation status displays as bell icon on an appointment.

When the Confirmation icon is green, the appointment has been confirmed through personal contact



If the bell is...	The appointment status is...
White	Unconfirmed
Green	Confirmed through personal contact. Personal contact includes responding to an automated call or to an email message
Yellow	Message left
Red	Could not confirm

◆ To manually synchronize DAISY and AutoRemind:

- 1 From the DAISY menu, select Configure, then Practice Config.
- 2 Click the AutoRemind tab.
- 3 Click the Sync button to upload updated appointment information and download the latest confirmation results.

Note. You can also manually synchronize DAISY and AutoRemind by selecting Sync AutoRemind from the Tools menu in the Schedule and Confirm Appointments windows.



Manage reminder schemes

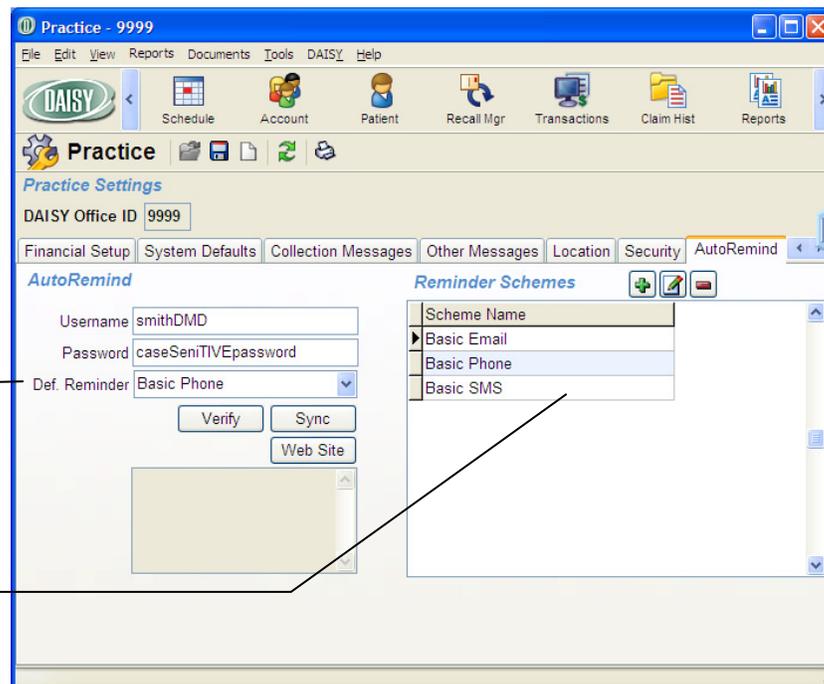
A reminder scheme defines a strategy for sending reminders to patients who have upcoming appointments. For example, one strategy might be to send a confirmation e-mail seven days prior to an appointment, asking for the patient to confirm that appointment. If the patient does not confirm, then the patient will receive a phone call the night before the appointment at 5:00 p.m.

DAISY provides the ability to create and name multiple reminder schemes so you can set up customized strategies for different types of patients. When you sign up for AutoRemind, your practice is provided with the following default reminder schemes:

- **Basic E-mail** – AutoRemind sends the patient an appointment confirmation via e-mail four days before the appointment. If the appointment is not confirmed, then it makes a voice call two days before the appointment. AutoRemind also sends a final reminder via e-mail one day before the appointment.
- **Basic Phone** – AutoRemind uses the primary contact phone number in the patient's Personal Info window to make a confirmation voice call two days before the appointment.
- **Basic SMS** – Uses the primary contact phone number if it is a cell phone. Otherwise it uses the *first* cell phone number in the Phone Numbers list. AutoRemind sends a confirmation text message four days before the appointment. If the appointment is not confirmed, then it makes a voice call two days before the appointment. AutoRemind also sends a reminder text message two hours before the appointment.

Use this drop-down list to specify the default reminder scheme for the practice

To start, DAISY provides you with three basic schemes



During initial setup, you select a default reminder scheme for your practice. If a patient is set up to use AutoRemind, all appointments set up for the patient will automatically use the default reminder scheme, unless an alternate scheme is selected for the patient.

Reminder schemes include reminder templates and reminder offsets.

Reminder templates

Reminder templates define the type of message, such as Confirm Appointment, and the language, such as US English. In each reminder scheme, a template defines the message content and the type of media (phone, e-mail, SMS text) that will be used to send the appointment reminder. For example, the practice may have one reminder template for e-mail reminders, and another one that asks the patient to confirm an appointment via an SMS text message.

- Confirm appointment templates generate messages that ask the patient to respond. For example:
 - If the template is a voice confirmation, patients are asked to press 5 to confirm that they received the message. AutoRemind considers this a personal contact confirmation. If the patient responds, the confirmation status displays as a green bell icon on the appointment in the DAISY schedule.
 - If AutoRemind makes the call, and the patient does not answer but AutoRemind can still leave a message, then it treats this result as a personal contact confirmation. The confirmation status displays as a green bell icon on the appointment in the DAISY schedule.
 - If the voice call is answered, but 5 is not pressed, then AutoRemind calls again every hour until the maximum number of voice call attempts allowed per appointment is reached. For more information about how to set the maximum voice call attempts allowed, see “Set up the AutoRemind profile” on page 44. The confirmation status displays as a red bell icon on the appointment in the DAISY schedule.
- Personal reminder templates do not ask the patient to respond. Once the reminder is delivered, AutoRemind changes the appointment’s confirmation status to “left message”. The confirmation status displays as a yellow bell icon on the appointment in the DAISY schedule. For more information about confirmation statuses, see “Synchronize AutoRemind with DAISY” on page 47.

Note. If the appointment’s confirmation status is already set to “personal contact”, AutoRemind will not set the status back to “left message”.



Reminder offsets

Reminder offsets define the timeframe in which you want to send your reminder prior to the appointment. Offsets tell AutoRemind how far in advance to send the reminder, such as seven days before the appointment. Different offsets can be attached to different templates. For example, you might want to e-mail patients a week in advance, but text message patients only a day or an hour in advance.

If the time for sending the reminder falls into the range when AutoRemind is blocked from sending messages, then AutoRemind will send the reminder one hour and 15 minutes before the block begins. For example:

- If the office has blocked the sending of reminders between 8:00 p.m. and 8:00 a.m. and a patient is supposed to receive a reminder two hours before their 8:00 a.m. appointment, then AutoRemind will send the reminder at 6:45 p.m. the prior evening.
- If the appointment is on Monday, and the patient is supposed to receive a phone call two days before, but the office has blocked calls on Saturday, then AutoRemind will call the patient on Friday.

Each scheme can have one or more templates and offsets. Using combinations of templates and offsets, a practice can build a variety of reminder schemes that address patient needs.

Set up a reminder scheme

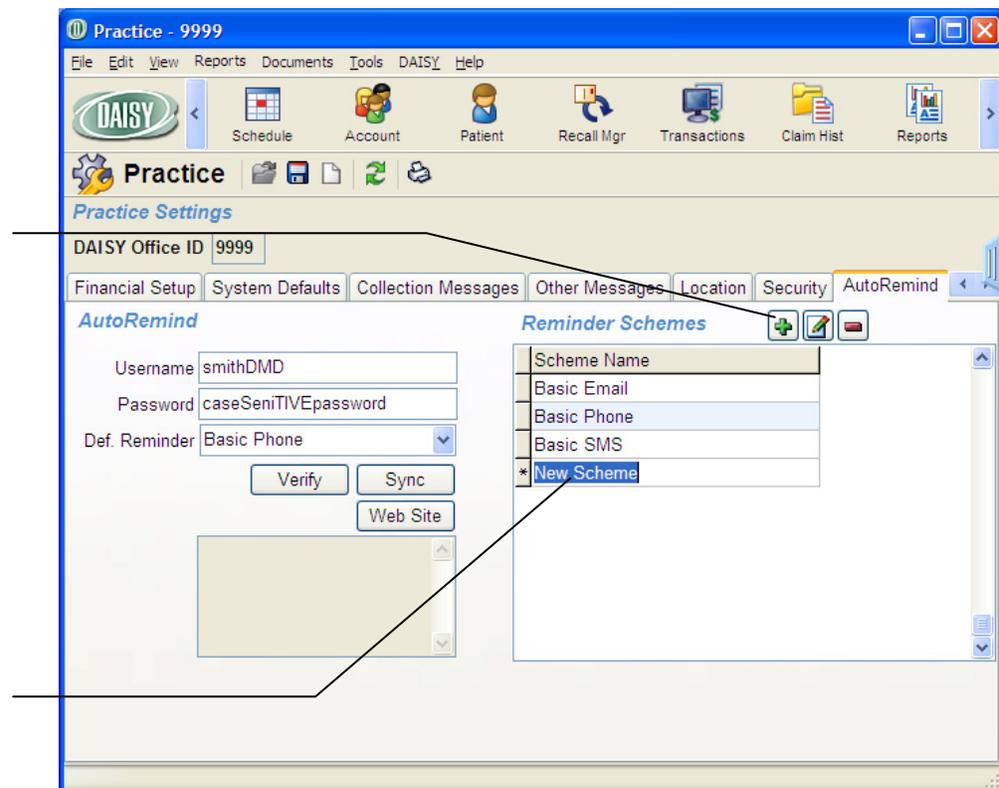
In this example, the front office wants to create a reminder scheme that sends a confirmation text message a week before the appointment, then follows that with an 8:00 a.m. reminder on the day of the appointment, if the patient has not confirmed.

◆ **To set up a reminder scheme:**

- 1 From the DAISY menu, select **Configure**, then **Practice Config**.
- 2 Click the **AutoRemind** tab.
- 3 In the **Reminder Schemes** section, click  to add a reminder scheme.
- 4 In the **New Scheme** cell, type the name of the new reminder scheme.

Choose a name that is descriptive of the scheme's strategy. For example, a scheme called "Confirm Appt SMS" could be set up to send a text message in US English a week before the appointment. If the patient does not confirm, then the scheme will send a reminder at 8:00 a.m. the day of the appointment.

Click here to add a
Reminder Scheme



Type the name of the
new scheme here

- 5 In the **Scheme Name** column, select the new scheme, then click  to add reminder templates and offsets to the scheme.

You see the Reminder Scheme window for the selected scheme.



- 6 In the **Reminder Template** column, click a blank row and select the appropriate reminder template from the drop-down list.
- 7 Tab to the **Reminder Offset** column and select the appropriate offset from the drop-down list.

Add templates and offsets for the new scheme here

Reminder Template	Reminder Offset
Confirm Appointment - Sms - US-EN	The day of the appointment at 8:00 AM
Confirm Appointment - Sms - US-EN	7 days before appointment

- 8 To add another template and offset, click .
- 9 Repeat steps 6 through 7.
- 10 Click and close the Reminder Scheme window.
- 11 To add another Reminder scheme, repeat steps 3 through 10.
- 12 Close the Practice window.

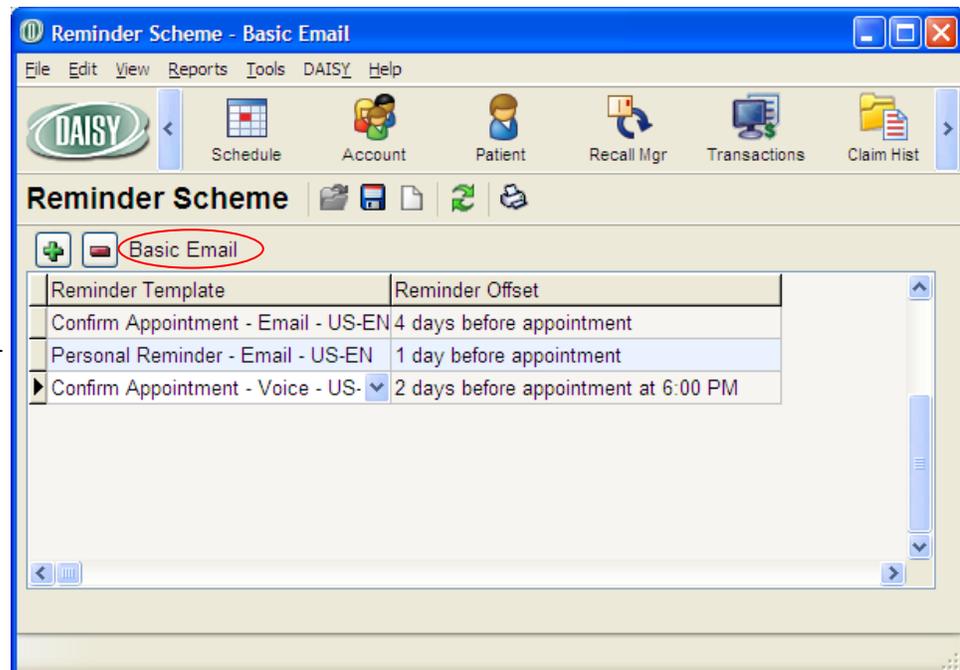
Note. Reminder schemes can be entered in the Reminder Scheme window in any order.

Modify a reminder scheme

◆ To modify a reminder scheme:

- 1 From the DAISY menu, select **Configure**, then **Practice Config**.
- 2 Click the **AutoRemind** tab.
- 3 In the **Reminder Schemes** section, select the scheme, then click  to edit the scheme.

You see the reminder templates and offsets associated with the scheme.



The Basic E-mail scheme has three reminder templates and associated reminder offsets

- 4 In the **Reminder Schemes** window, do one of the following:
 - To change the reminder template, click the template and select a different one from the drop-down list.
 - To change the reminder offset, click the offset and select a different one from the drop-down list.
 - To add a reminder template, click . Click the template column and select the appropriate template. Tab to the Reminder Offset column and select the appropriate offset.
 - To remove a reminder template and its offset, click the template, then click . In the Confirm dialog box, click Yes.
- 5 Click  and close the **Reminder Scheme** window.
- 6 Close the **Practice** window.



Set up automatic reminders for a patient

Once the practice's AutoRemind settings are complete, you are ready to start using AutoRemind. Whenever you set up an appointment for a patient or you access a patient's information, you can set up the patient to receive automatic reminders. A patient can be set up to use the practice's default reminder scheme, or you can select a personal reminder scheme for the patient.

Once a patient is set up for automatic reminders, any appointment you set up for the patient is automatically assigned that patient's default reminder scheme.

Set up the practice's default reminder scheme for a patient

◆ **To use the practice's reminder scheme for a patient:**

- 1 From the DAISY toolbar, click  .
- 2 Search for and select the patient you want, then click OK.
- 3 In the Patient window, click  to edit the patient's personal information.

Personal Info. - Gary Austin

File Edit View Reports Tools DAISY Help

DAISY Schedule Account Patient Recall Mgr Transactions

Personal Info. Save Print Refresh Undo Redo

Prefix First Middle Last Suffix

Care Of (Optional)

Street

City

State Zip -

Nickname

Birth Date SSN

E-Mail

Employment

Phone Numbers

Type	No.	Ext.
Cellular Phone	(971) 775-6301	
Home	(503) 896-6918	

Primary phone for appointments

Reminder Scheme Use Practice Default Use AutoRemind

Practice Scheme

Added by: BETTY 09/20/2007 08:54 AM Edited By: DMCHelp 08/26/2010 08:03 AM

Check here to enable AutoRemind for this patient

- 4 In the **Reminder Scheme** section, check the **Use AutoRemind** check box to use the practice's default reminder scheme for this patient.

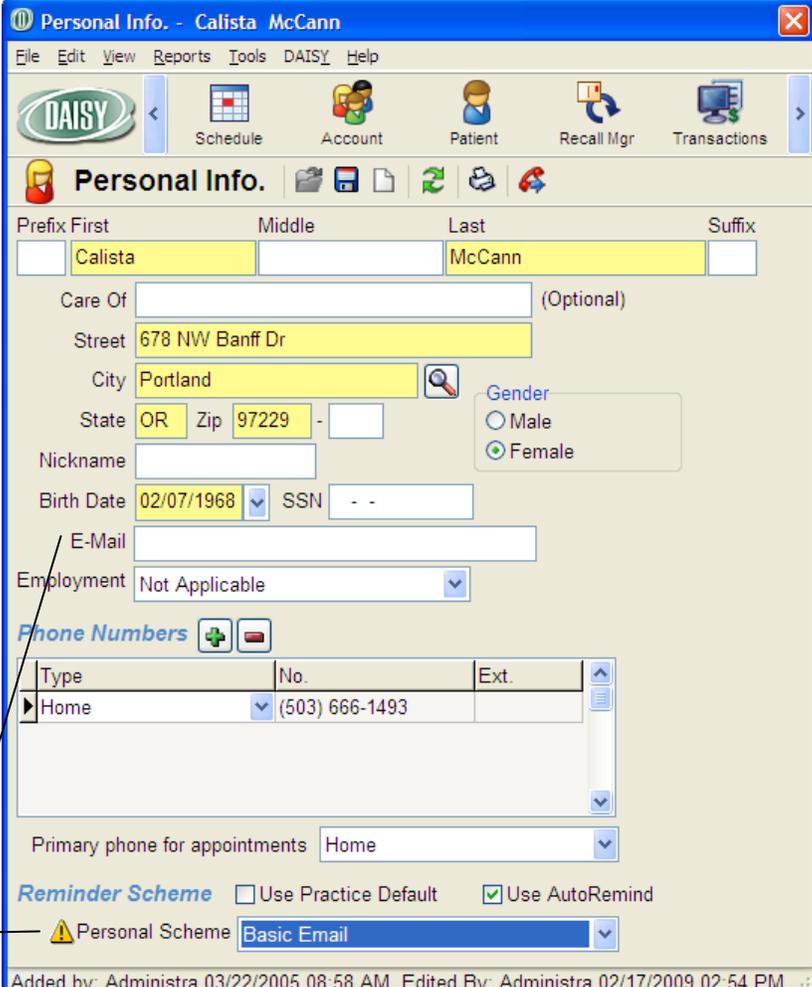
Note. For more information about setting up the default reminder scheme for the practice, see "Manage reminder schemes" on page 48.

- 5 Click  and close the **Personal Info** window.

Set up a personal reminder scheme for a patient

- ◆ To set up a personal reminder scheme for a patient:

- 1 From the DAISY toolbar, click .
- 2 Search for and select the patient you want, then click OK.
- 3 In the **Patient** window, click  to edit the patient's personal information.
- 4 To enable AutoRemind for this patient, check the **Use AutoRemind** check box.
- 5 In the **Reminder Scheme** section, uncheck the **Use Practice Default** check box.



Personal Info. - Calista McCann

File Edit View Reports Tools DAISY Help

DAISY Schedule Account Patient Recall Mgr Transactions

Personal Info.

Prefix First Middle Last Suffix
 Calista McCann

Care Of (Optional)

Street 678 NW Banff Dr

City Portland

State OR Zip 97229 -

Nickname

Birth Date 02/07/1968 SSN - -

E-Mail

Employment Not Applicable

Phone Numbers

Type	No.	Ext.
Home	(503) 666-1493	

Primary phone for appointments Home

Reminder Scheme Use Practice Default Use AutoRemind

⚠ Personal Scheme Basic Email

Added by: Administra 03/22/2005 08:58 AM Edited By: Administra 02/17/2009 02:54 PM

If the Personal Scheme requires information that is not available, you see a warning icon



- 6 In the Personal Scheme drop-down list, select the reminder scheme to use for this patient.**

Note. If the selected Personal Scheme requires information that is not available in the patient's Personal Info, such as Basic E-mail for someone who does not have an e-mail address, you see a warning icon next to the Personal Scheme drop-down list.

- 7 Click  and close the Personal Info window.**

Note. Because DAISY is integrated with AutoRemind, changes in the Personal Info window, such as phone number or e-mail address, upload automatically to the AutoRemind service.

Add AutoRemind to a specific appointment

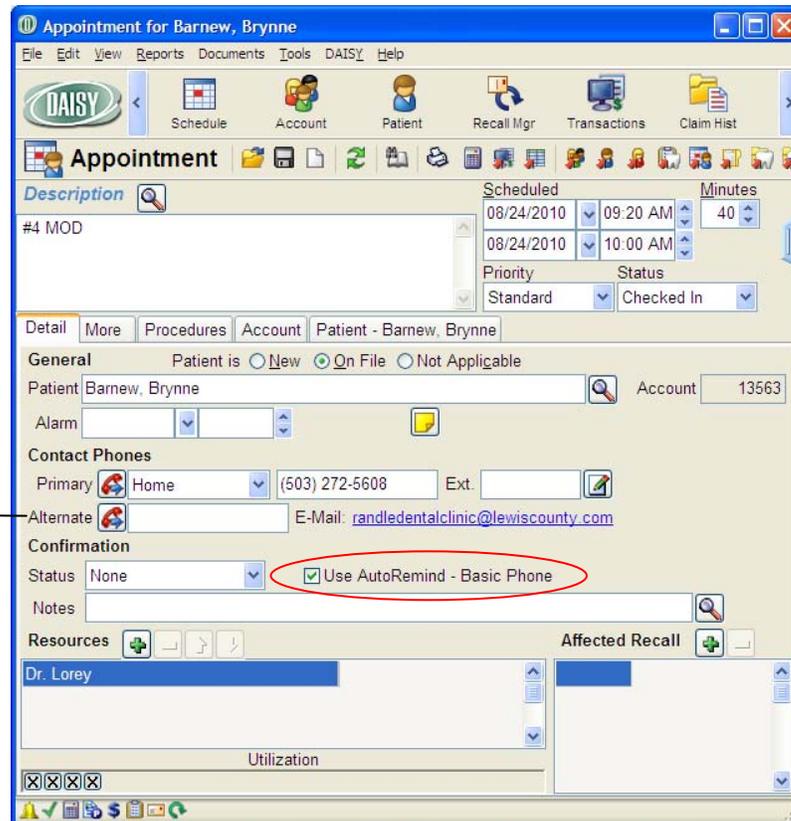
A specific appointment can be set up to use AutoRemind.

- If the patient is not set up to use AutoRemind, DAISY applies the practice's default reminder scheme to the appointment. For more information, see "Manage reminder schemes" on page 48.
- If the Use AutoRemind check box is checked in the Patient's Personal Info window, then all appointments created for the patient will automatically use that patient's reminder scheme. For more information, see "Set up automatic reminders for a patient" on page 54.

◆ **To add AutoRemind to a specific appointment:**

- 1 From the DAISY toolbar, click  to open the appropriate schedule.
- 2 In the Schedule window, double-click the appointment to open it.
- 3 In the Confirmation section, check the Use AutoRemind – *scheme name* check box.

Scheme name is the name of reminder scheme associated with this patient.



Appointment for Barnew, Brynne

File Edit View Reports Documents Tools DAISY Help

DAISY Schedule Account Patient Recall Mgr Transactions Claim Hist

Appointment

Description #4 MOD

Scheduled 08/24/2010 09:20 AM 40 Minutes
08/24/2010 10:00 AM

Priority Standard Status Checked In

Detail More Procedures Account Patient - Barnew, Brynne

General Patient is New On File Not Applicable

Patient Barnew, Brynne Account 13563

Alarm

Contact Phones
Primary Home (503) 272-5608 Ext.
Alternate E-Mail: randledentalclinic@lewiscounty.com

Confirmation
Status None Use AutoRemind - Basic Phone

Notes

Resources Dr. Lorey Affected Recall

Utilization

AutoRemind never uses the alternate phone number to send an appointment reminder

- 4 Click  and close the Appointment window.

Note. AutoRemind can also be added to a specific appointment from the Confirm Appointments window.



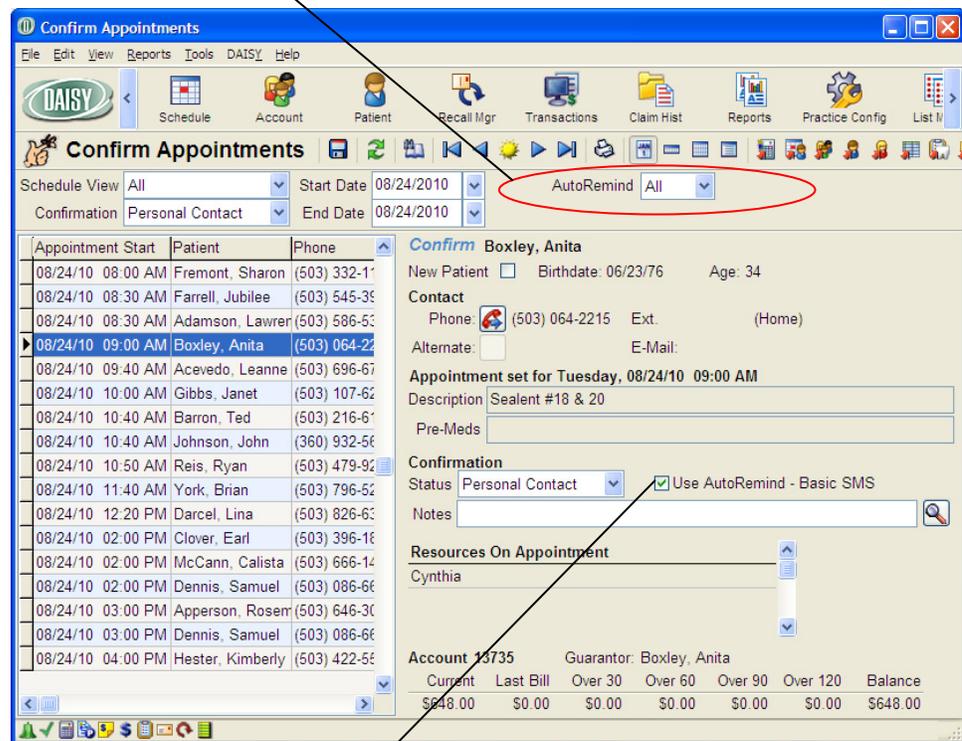
View the status of AutoRemind appointments

In DAISY 4.0, the Confirm Appointments window has changed to include an AutoRemind filter. You can use this filter to easily view the confirmation status of appointments with AutoRemind or just those without. For example, you may want to view the day's appointments that are not set up with auto-reminders so you can call the patients directly.

◆ **To view the confirmation status of AutoRemind appointments:**

- 1 **From the DAISY menu, select Appointment, then select Confirmation to open the Confirm Appointments window.**
- 2 **In the AutoRemind drop-down list, do one of the following:**
 - Select Yes to view the confirmation status of AutoRemind appointments.
 - Select No to view the confirmation status of appointments that are not set up for AutoRemind.
 - Select All to view the confirmation status of all appointments.

Use this filter to find all appointments with Autoremind enabled or just those without it



Check this check box to enable AutoRemind for the selected patient

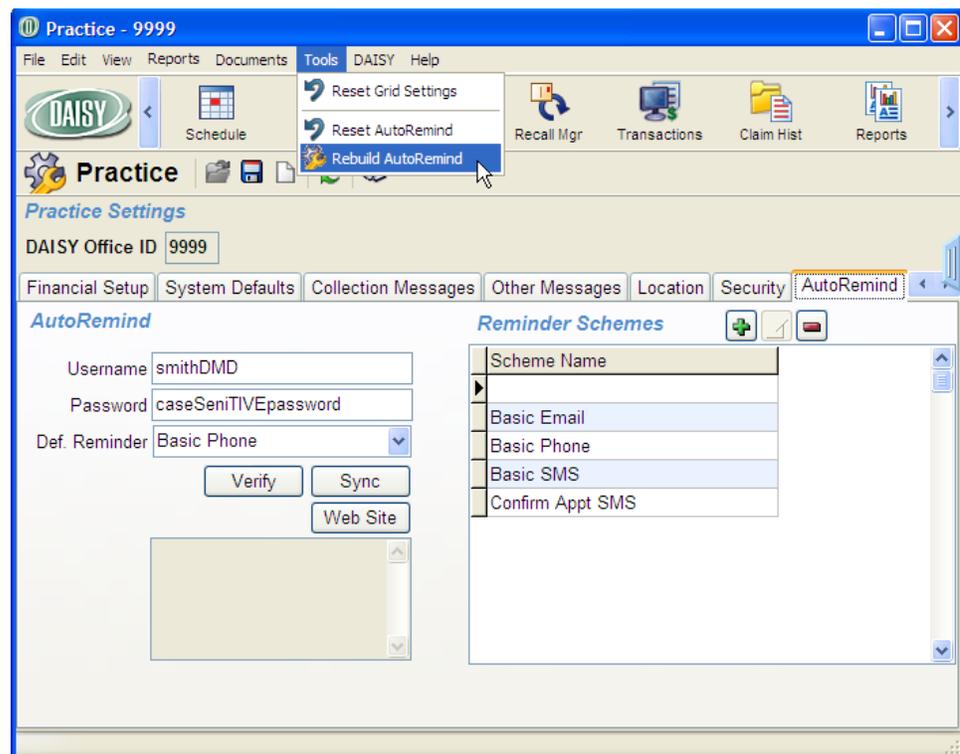
Rebuild AutoRemind Data

If AutoRemind data becomes corrupted on the AutoRemind website, you can use this procedure to rebuild the information stored there.

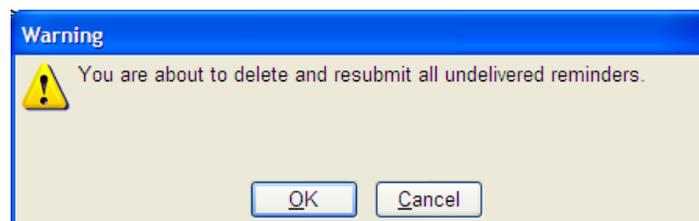
Note. You must have Modify access permissions to perform this task. For more information, see “Set up access permissions for AutoRemind” on page 46.

◆ **To rebuild data on the AutoRemind website:**

- 1 From the DAISY menu, select **Configure**, then **Practice Config**.
- 2 From the **Tools** menu, select **Rebuild AutoRemind**.



- 3 In the Warning dialog box, click **OK**.



When complete, you see the message “Rebuilding Reminders Completed.” in the text box below the Web Site button.

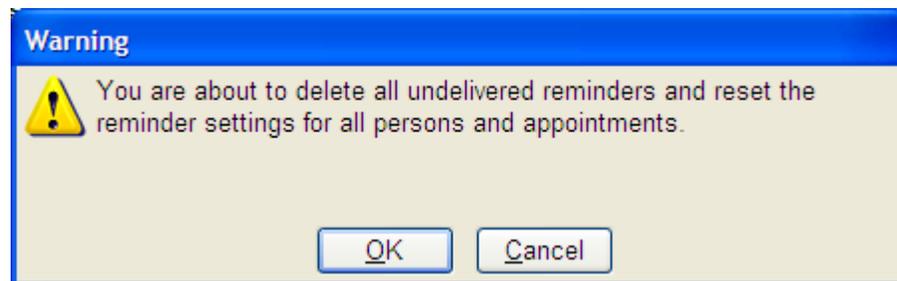


Discontinue the AutoRemind service

If you want to discontinue the AutoRemind service, you can use this procedure to remove all AutoRemind data from DAISY and from the AutoRemind website.

Note. You must have Modify access permissions to perform this task. For more information, see “Set up access permissions for AutoRemind” on page 46.

- ◆ **To discontinue the AutoRemind service:**
 - 1 **From the DAISY menu, select Configure, then Practice Config**
 - 2 **From the Tools menu, select Reset AutoRemind.**
 - 3 **In the Warning dialog box, click OK.**



All reminder data is removed from AutoRemind in DAISY and the AutoRemind website.



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