What's New in 5.1

Table Of Contents

PRACTICE ANALYSIS MODULE: 2

Audit Log (formerly Practice Analysis) 2
Productivity Report 4
Practice Analysis Report 6
Monthly Goals Report 8

PATIENT FILE MODULE: 10

Export/Import & Patient File Merge 10
Import 10
Merge 11
Patient Status Report 12
New Patients Report 13
Referrals 14
Exclude Item Fees from Patient Insurance Limit 16
Medication Manager 17
Notes Manager : 18
Signatures: 18
Transgender & Non-Binary Status 19
Patient File Module Minor Changes: 19

TRANSACTIONS MODULE: 20

Case Acceptance Report 20
EDITING TREATMENT PRODUCER **21**
Optional Ortho Plan Fee Codes 22
Ortho Report 23
Updating Ortho Plan Doctor 24
Bulk Insurance Wizard 25
Multipage Predetermination 29
Insurance Attachments 30
Transaction Module Minor Changes: 30

SCHEDULER/ APPOINTMENT BOOK MODULE: 31

Review Work Schedules Report 31
Today's Work Schedules: 33
Search Blocked Off Time 34
Finding Appointments 35
Hide Inactive Producers on Schedule Setup 37
Swap Producer Chairs Utility 38
Disabling Short Notice for Past Appointments: 39
SCHEDULER MODULE MINOR CHANGES: **40**

GENERAL PROGRAM IMPROVEMENTS: 40

Practice Analysis Module

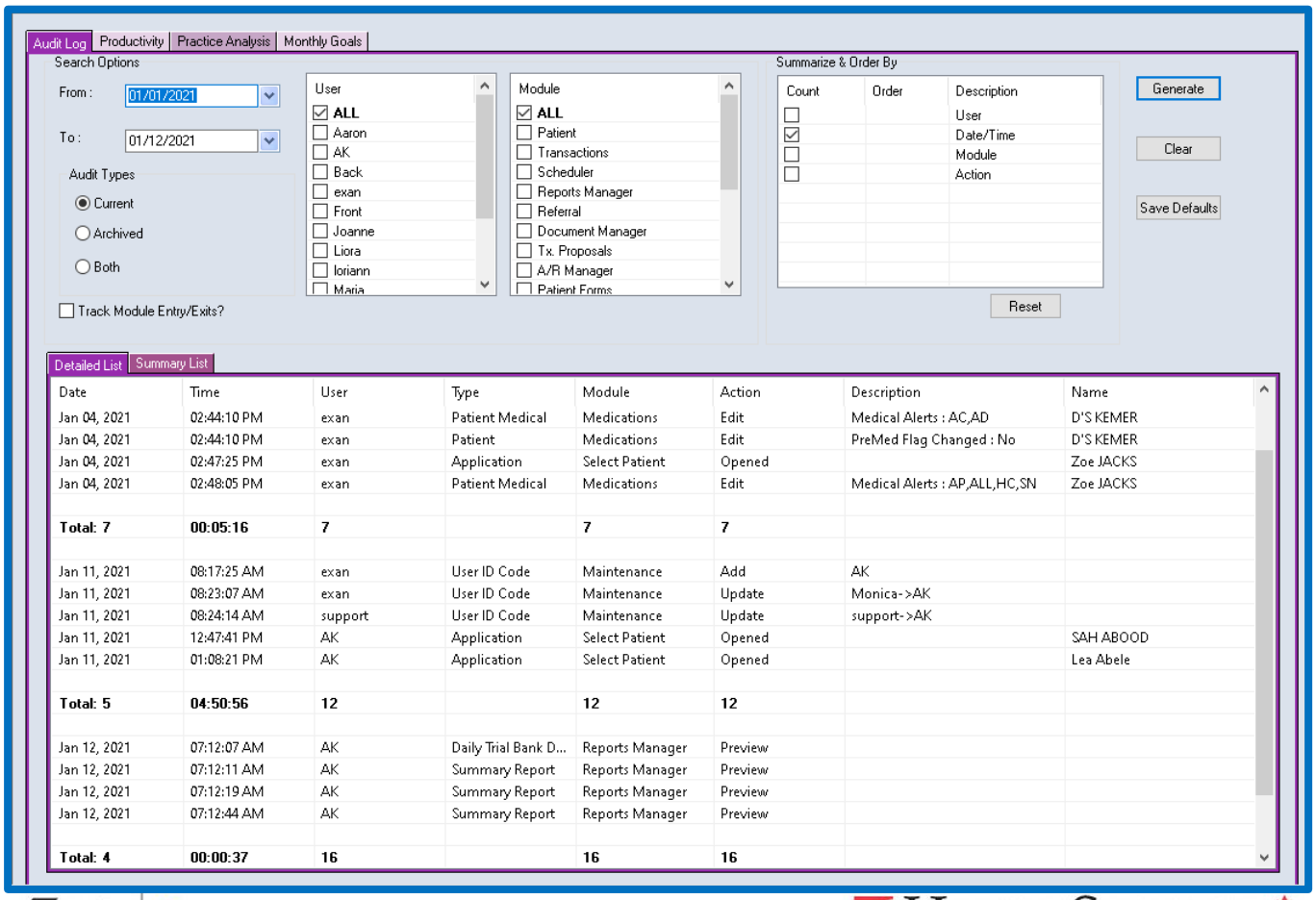
Audit Log (formerly Practice Analysis)

Online article: 5.1 - Audit Log - Power Practice

The Practice Analysis module added in version 4.8 has been expanded in this release. The old report has been renamed “Audit Log”. This report still functions as it used to under the previous name, Practice Analysis. Its focus is reporting on changes made in different parts of the program and by whom.

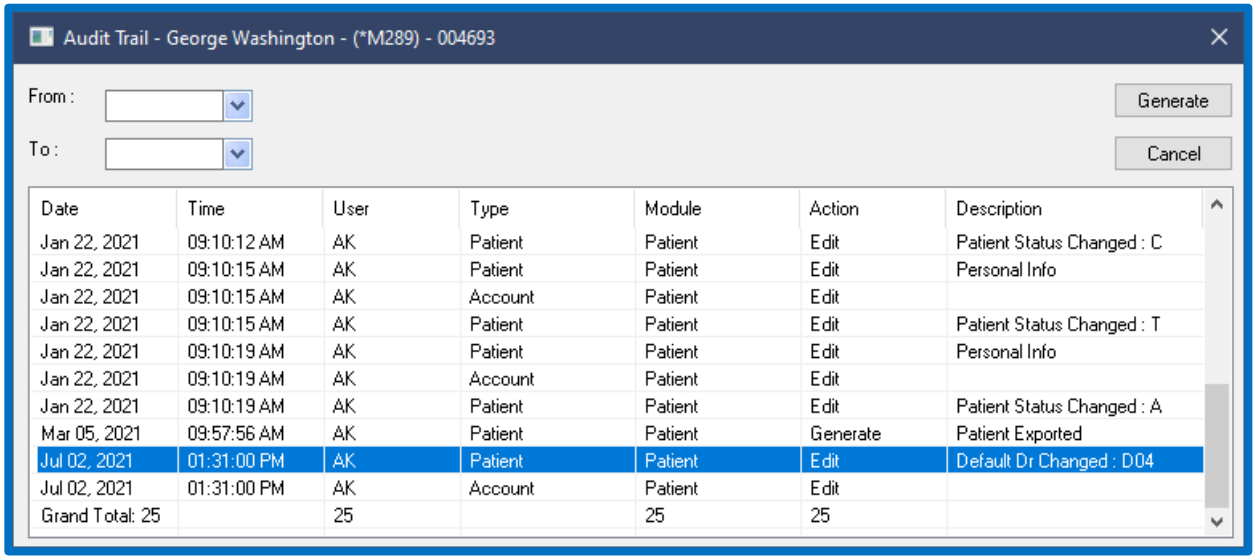
- Important Notes: For this feature to report accurately, the Extended Autditing must be turned on in the Environment Settings. You can contact Support to confirm it is set properly or get help enabling it. Version 5.0 and higher should already have this setting enabled.
- Only limited audit trails are available if set to standard.
- All staff should also log into Power Practice with their own User ID; if multiple stations are logged in with the same user, the program cannot separate who made the changes.

The image below demonstrates some of the types of results you can expect from this report. With Extended Auditing enabled, you will find a list of records of actions taken within Power Practice. You can breakdown and organize your results in a few different manners, the scope and content reported on is up to you.



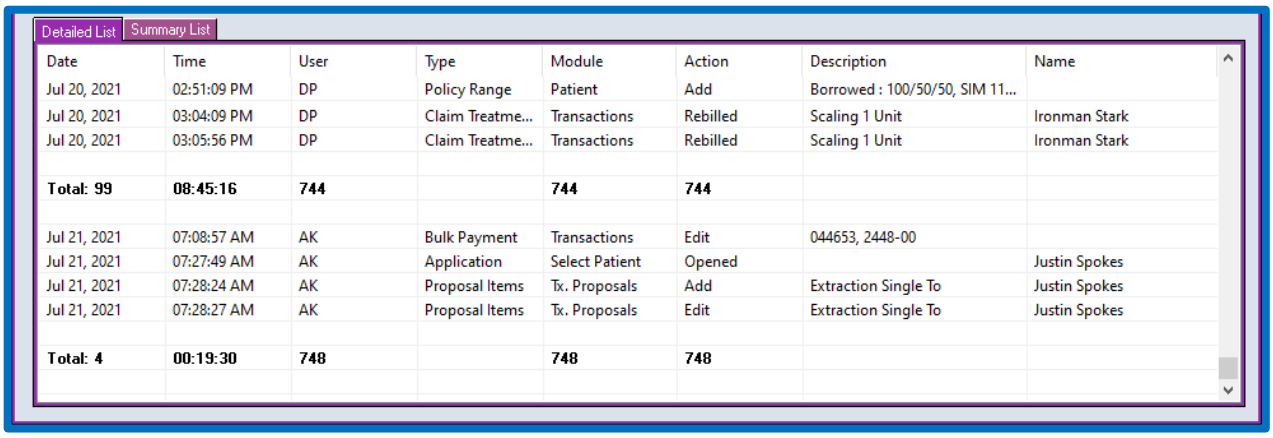
The module tracks a significant number of details, the only key component is to ensure all staff are using *unique login names* otherwise the information provided by this module will significantly loose accuracy. If multiple users are signed on with the same username, you will not be able to accurately separate the actions taken between users.

The Audit Log will provide valuable information on changes made throughout the program. For example, changing the patient default provider will be listed in the Audit Log report as well as the patient's own personal Audit Trail.



Date	Time	User	Type	Module	Action	Description
Jan 22, 2021	09:10:12 AM	AK	Patient	Patient	Edit	Patient Status Changed : C
Jan 22, 2021	09:10:15 AM	AK	Patient	Patient	Edit	Personal Info
Jan 22, 2021	09:10:15 AM	AK	Account	Patient	Edit	
Jan 22, 2021	09:10:15 AM	AK	Patient	Patient	Edit	Patient Status Changed : T
Jan 22, 2021	09:10:19 AM	AK	Patient	Patient	Edit	Personal Info
Jan 22, 2021	09:10:19 AM	AK	Account	Patient	Edit	
Jan 22, 2021	09:10:19 AM	AK	Patient	Patient	Edit	Patient Status Changed : A
Mar 05, 2021	09:57:56 AM	AK	Patient	Patient	Generate	Patient Exported
Jul 02, 2021	01:31:00 PM	AK	Patient	Patient	Edit	Default Dr Changed : D04
Jul 02, 2021	01:31:00 PM	AK	Account	Patient	Edit	
Grand Total: 25		25		25	25	

As of 5.1, the Audit Log's level of details has improved dramatically. You will find records of almost every action taken in this report. It captures patient file creation and modifications, Appointment creation, modification, and deletion. Transactions are also tracked so your entries, adjustments, reversals, and submissions are easy to review. You can even review Document Manager activity.

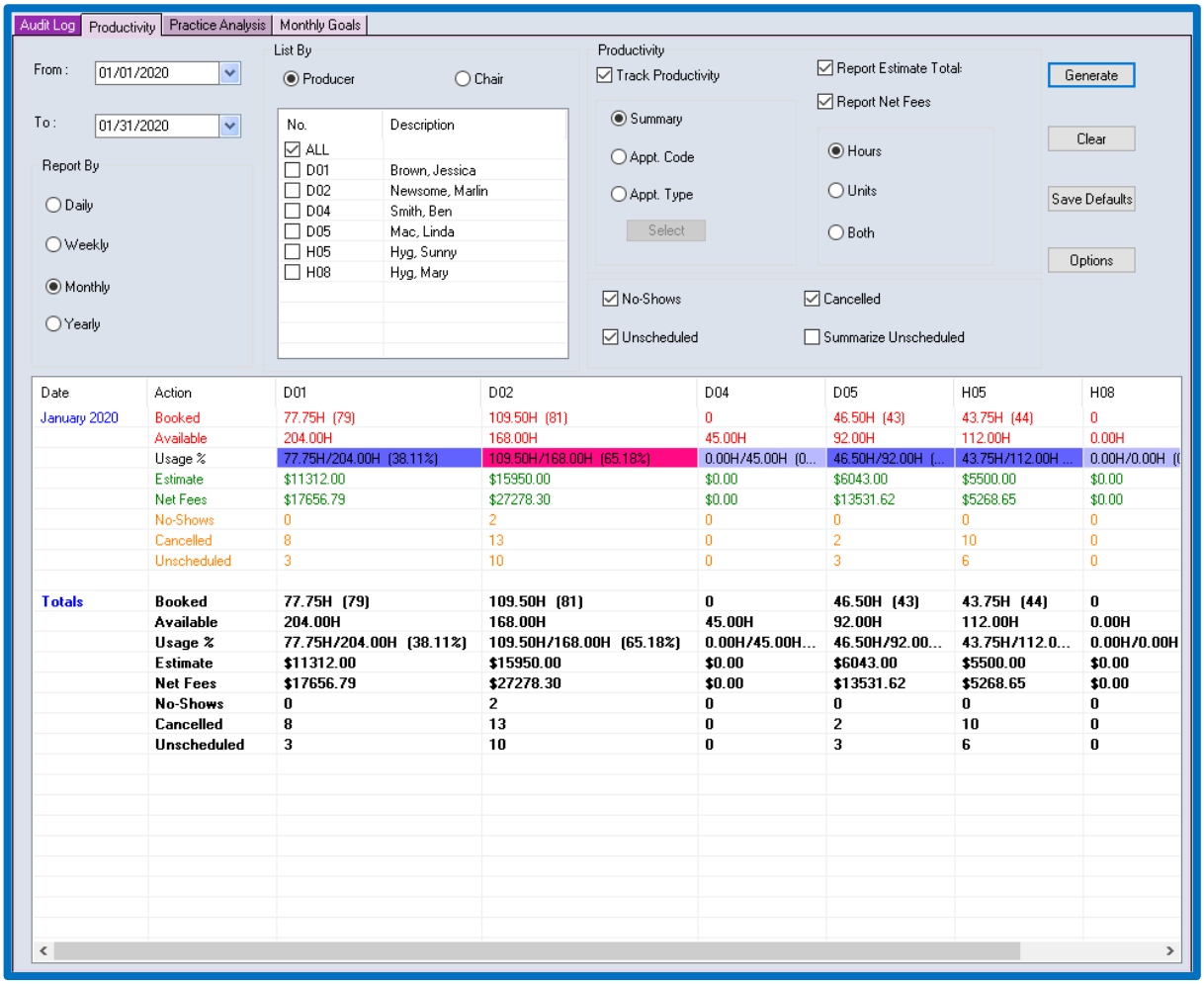


Date	Time	User	Type	Module	Action	Description	Name
Jul 20, 2021	02:51:09 PM	DP	Policy Range	Patient	Add	Borrowed : 100/50/50, SIM 11...	
Jul 20, 2021	03:04:09 PM	DP	Claim Treatme...	Transactions	Rebilled	Scaling 1 Unit	Ironman Stark
Jul 20, 2021	03:05:56 PM	DP	Claim Treatme...	Transactions	Rebilled	Scaling 1 Unit	Ironman Stark
Total: 99	**08:45:16**	**744**		**744**	**744**		
Jul 21, 2021	07:08:57 AM	AK	Bulk Payment	Transactions	Edit	044653, 2448-00	
Jul 21, 2021	07:27:49 AM	AK	Application	Select Patient	Opened		Justin Spokes
Jul 21, 2021	07:28:24 AM	AK	Proposal Items	Tx. Proposals	Add	Extraction Single To	Justin Spokes
Jul 21, 2021	07:28:27 AM	AK	Proposal Items	Tx. Proposals	Edit	Extraction Single To	Justin Spokes
Total: 4	**00:19:30**	**748**		**748**	**748**		

Productivity Report

Online article: 5.1 - Productivity Report - Power Practice

The Productivity tab of this module provides a reporting utility which can breakdown your producer's working hours in a clear and easy to follow way.



The focus of this tab is to clarify how each producer's hours were spent. It will present a total Booked value in units or hours, the total Available time (represented by the white space on a producer's column) and then finds a Usage % by comparing those two figures. It also provides some financial estimates for the given date range and breaks down cancellations of all kinds.

An important note to keep in mind: if your office regularly purges the Scheduler, this report will not be able to produce any meaningful results for past dates.

Another consideration to keep in mind is that the Available and Booked time estimates will consider **all** the producer's associated chairs. If your office has multiple chairs per provider, you may wish to run the report by Chair instead of Producer and specify which ones to refer to for data.

Setup:

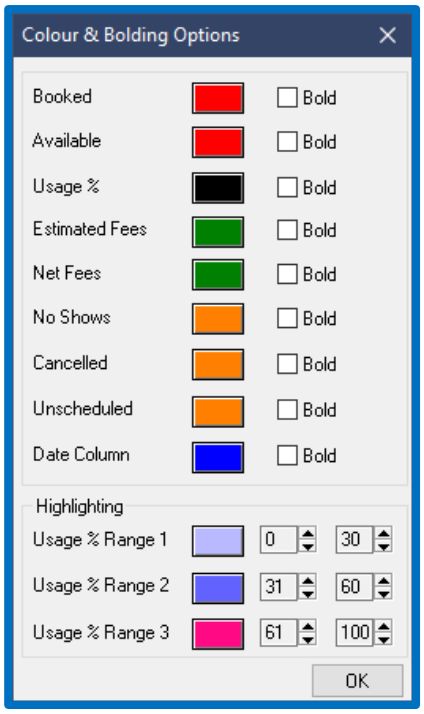
- The report is run by date range and can be broken down into Daily, Weekly, Monthly or Yearly results.
- It allows the user to report on all producers or chairs, or a select few via the checklist.
- You may wish to be very selective when choosing the producers or chairs to include as old, inactive producers can easily litter the report with irrelevant or inaccurate results.
- The information can be displayed in a Summary format, as shown in the image above, or in detail, broken down by Appt Code or Type.
- The Select button becomes available upon choosing the Code or Type options, enabling you to specify which Codes or Types you want to report on. This will help you focus your report.

Breakdown:

- You can choose which types of Unscheduled appointment types you want included or excluded. These include No-Shows, Cancellations, and the Unscheduled status. You can also summarize all of these into a single line, “unscheduled”.
- Estimate Total can provide a rough dollar figure based on the linked Planned treatments as well as the default appointment code estimates associated with each appointment code, if they are setup already.
- Net Fees will provide a more accurate dollar figure based on the treatments and payments made by the patients of that producer or chair.
- Results can be displayed in Units, Hours or both formats.

Options:

- The options button provides a few selections to colour code your results.
- Each line can be given a unique colour or left as the standard Black font.
- Bolding options are available for each line.
- The Usage Range % lines at the bottom are used to designate what each band or range of Usage percentages to colour code. In this example, usage rates of 0-30% will be presented in the soft lilac colour, while the 31-60 is shown in the darker purple and the final range, 61-100% at the end. These values refer to the difference between Available and Booked time for each producer.



For a more detailed discussion of this report and the available options, visit the linked online article provided at the start of this section.

Practice Analysis Report

Online article: 5.1 - Practice Analysis - Power Practice

The Practice Analysis tab is a new addition to this module. It will gather several key analysis points for the given date range and producers.

Audit Log | Productivity | Practice Analysis | Monthly Goals

Search Options

From : 01/01/2020

To : 01/15/2021

No.	Description
☑ ALL	
☑ D01	Brown, Mona
☐ D02	Anderson, Aaron
☐ D04	Daniels, Ben
☐ D05	Lyons, Linda
☐ H05	Hug, Sunny

Generate

Options

Defaults

Patients

Doctor	New	Inact./Closed	Diff	Visits
D01	116	31	85	476
D02	3	1	2	64
D05	6	0	6	6
Total:	**125**	**32**	**93**	**546**

Productivity

Prod	Booked	Available	Usage %	Unscheduled
D01	427.00H (41...	1917.00H	427.00H/1917....	369
D02	550.75H (40...	1869.00H	550.75H/1869....	369
D04	0.00H (0)	495.00H	0.00H/495.00H...	0
D05	488.50H (42...	1092.50H	488.50H/1092....	637
H05	611.00H (40...	1447.00H	611.00H/1447....	293
Total:	**2077.25H ...**	**6820.50H**	**2077.25H/6...**	**1668**

Case Acceptance

Type	Prod	Status	Total	Status	Total	%
Planned Treatments		**New**		**P->I/C**		
	D01	53	$19442.83	19	$8483.63	35.85%
	D02	5	$847.00	2	$166.00	40.00%
	D05	1	$64.00	0	$0.00	0.00%
	H05	3	$153.00	1	$94.00	33.33%
	H08	1	$350.00	1	$350.00	100.00%
Total:		**63**	**$20856.83**	**23**	**$9093.63**	**36.51%**

A/R

Prod	Honoraires	Labs	Adj	NET Fees	Payments	Adj	NET Pmts	A/R
D05	100177.90	5253.30	3191.05-	102240.15	96237.31-	462.60	96739.20-	5500.95
H05	15845.50	0.00	771.61-	15073.89	18591.61-	314.25	18532.71-	3458.82-
H08	11397.00	350.00	99.95-	11647.05	4359.30-	0.00	4359.30-	7287.75
Total:	**335024.68**	**333209.68**	**13910.70-**	**358786.12**	**345380.12-**	**2794.37**	**342611.20-**	**16174.92**
Goal				**1000000.00 ...**				

Patients:

- This section breaks down the patient related data. New files added, files closed or inactivated and their difference, as well as total visits.

Productivity:

- This section breaks down producer bookings and availability, giving you a total chair usage percentage, as well as noting Unscheduled totals.
- It is important to note that Productivity refers to Scheduler records for its data. If you purge your scheduler and work schedule entries, your results will be affected. You can contact support for help increasing the maximum patient appointment limit.

Case Acceptance

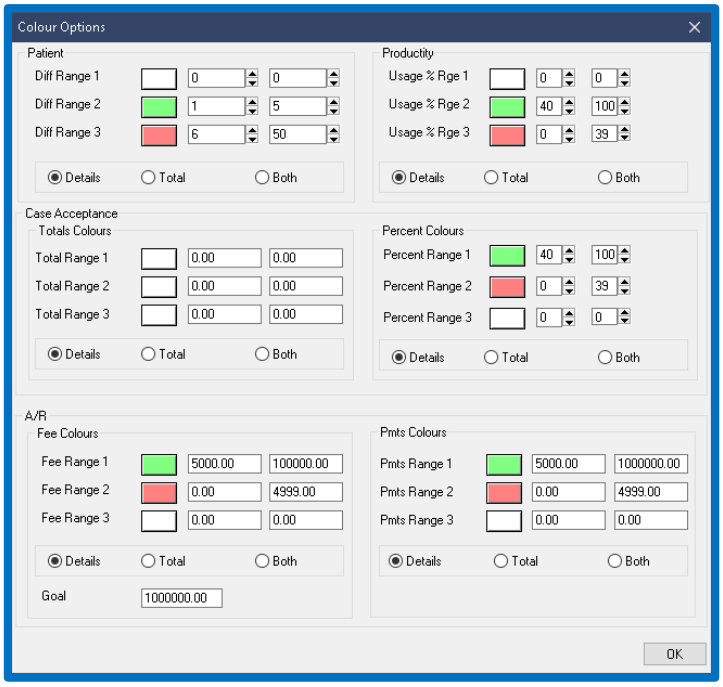
Type	Prod	Status	Total	Status	Total	%
Proposals		**New**		**Approved**		
	D01	10	$3170.33	9	$3159.23	90.00%
	H05	2	$282.00	1	$94.00	50.00%
	H08	1	$350.00	1	$350.00	100.00%
Total:		**13**	**$3802.33**	**11**	**$3603.23**	**84.62%**

Case Acceptance:

- This section refers to Treatment Proposals (shown above) created in said module, as well as Planned Treatments (as shown on the previous page).
- It tracks total cases or planned treatments, their dollar values associated, completion rates/acceptance rates and resulting values.

A/R:

- This section provides a quick glance at office A/R. The Honoraries column lists fees charged for treatment as well as office charges (take home bleaching kits, toothbrushes etc). Labs are parsed out for your ease, followed by adjustments, payments, and their respective net totals, and finally, the overall A/R.



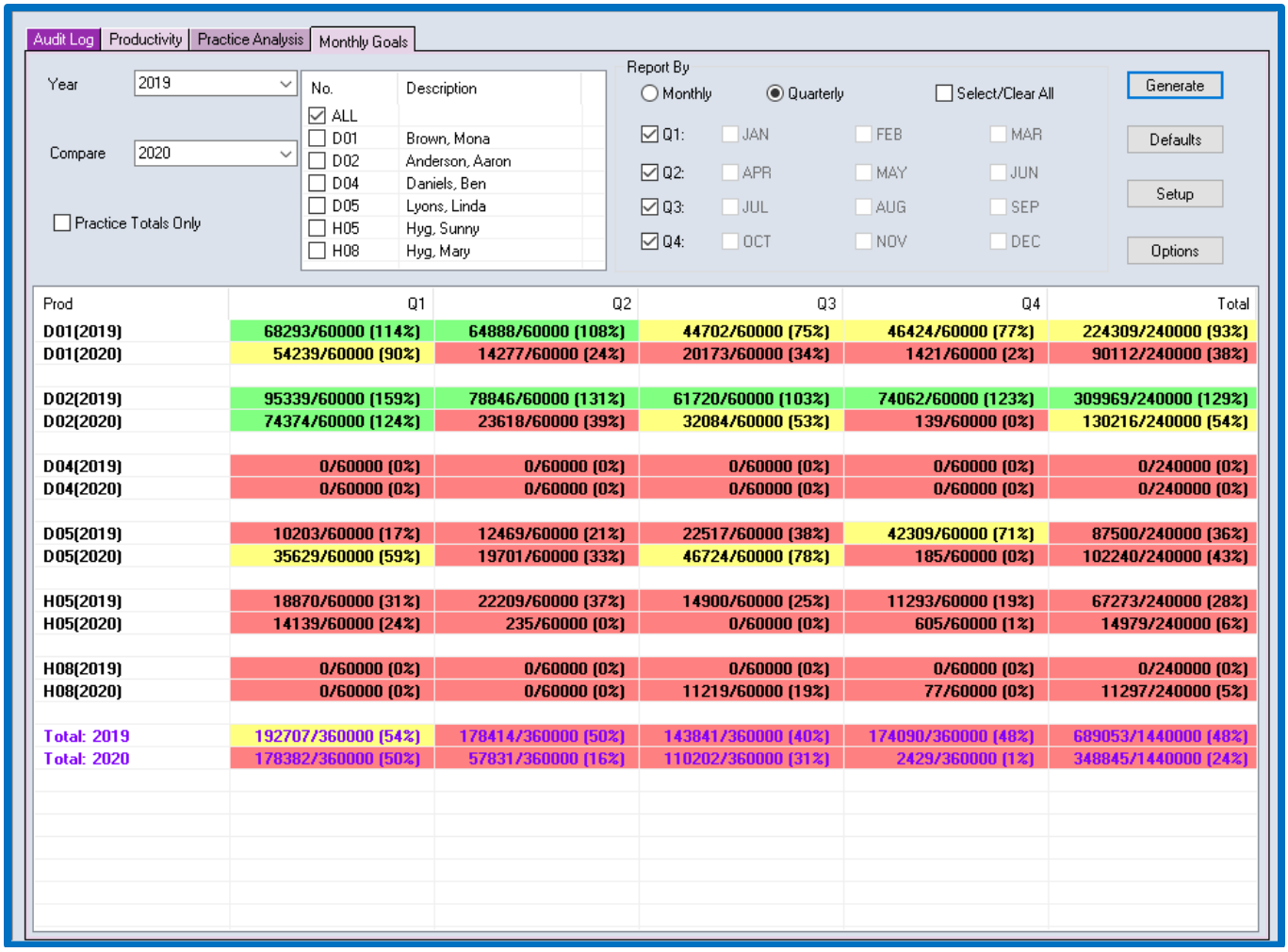
Options Button:

- The Options button in the upper right of this module window allows you to customize how your results are shown using ranges and colours to quickly identify whether your numbers are on target or too low.
- You can also choose not to display any results in colour, if you prefer a tidier view of your results.

Monthly Goals Report

Online article: 5.1 - Monthly Goals - Power Practice

The Monthly Goals tab added in version 5.0 will provide an easy-to-use reference on monthly financial goals. The report can be custom set to quickly identify whether you are on target or not.



Prod	Q1	Q2	Q3	Q4	Total
D01(2019)	68293/60000 (114%)	64888/60000 (108%)	44702/60000 (75%)	46424/60000 (77%)	224309/240000 (93%)
D01(2020)	54239/60000 (90%)	14277/60000 (24%)	20173/60000 (34%)	1421/60000 (2%)	90112/240000 (38%)
D02(2019)	95339/60000 (159%)	78846/60000 (131%)	61720/60000 (103%)	74062/60000 (123%)	309969/240000 (129%)
D02(2020)	74374/60000 (124%)	23618/60000 (39%)	32084/60000 (53%)	139/60000 (0%)	130216/240000 (54%)
D04(2019)	0/60000 (0%)	0/60000 (0%)	0/60000 (0%)	0/60000 (0%)	0/240000 (0%)
D04(2020)	0/60000 (0%)	0/60000 (0%)	0/60000 (0%)	0/60000 (0%)	0/240000 (0%)
D05(2019)	10203/60000 (17%)	12469/60000 (21%)	22517/60000 (38%)	42309/60000 (71%)	87500/240000 (36%)
D05(2020)	35629/60000 (59%)	19701/60000 (33%)	46724/60000 (78%)	185/60000 (0%)	102240/240000 (43%)
H05(2019)	18870/60000 (31%)	22209/60000 (37%)	14900/60000 (25%)	11293/60000 (19%)	67273/240000 (28%)
H05(2020)	14139/60000 (24%)	235/60000 (0%)	0/60000 (0%)	605/60000 (1%)	14979/240000 (6%)
H08(2019)	0/60000 (0%)	0/60000 (0%)	0/60000 (0%)	0/60000 (0%)	0/240000 (0%)
H08(2020)	0/60000 (0%)	0/60000 (0%)	11219/60000 (19%)	77/60000 (0%)	11297/240000 (5%)
Total: 2019	192707/360000 (54%)	178414/360000 (50%)	143841/360000 (40%)	174090/360000 (48%)	689053/1440000 (48%)
Total: 2020	178382/360000 (50%)	57831/360000 (16%)	110202/360000 (31%)	2429/360000 (1%)	348845/1440000 (24%)

Year/Compare:

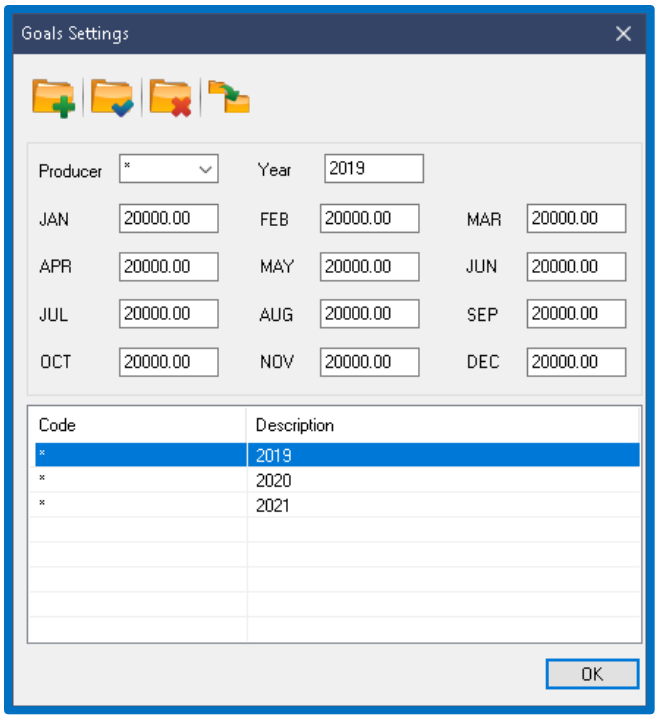
- We can select a year from the dropdown and compare it with another.
- These must be setup in the Setup button. Discussed shortly below.

Producers:

- You can select which producers to include in the report from the checklist.

Report By:

- You can choose how to present the data, Monthly or Quarterly.
- The selections here are as flexible as you need them to be. You can simply compare years or limit your scope to specifically compare two quarters or several months to one another.

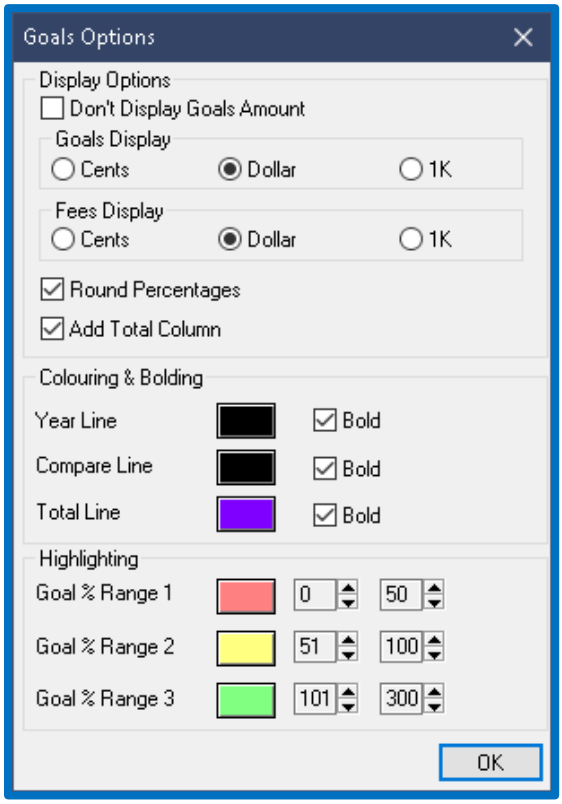


Setup Button:

- This button allows you to define your producer and year options.
- The producer dropdown can be set to All Producers, All Drs, All Hyg, or just one specific Producer.
- You must designate the Year for which these goals corelate.
- Finally, you can define the financial production goal for each month of the year.

Options Button:

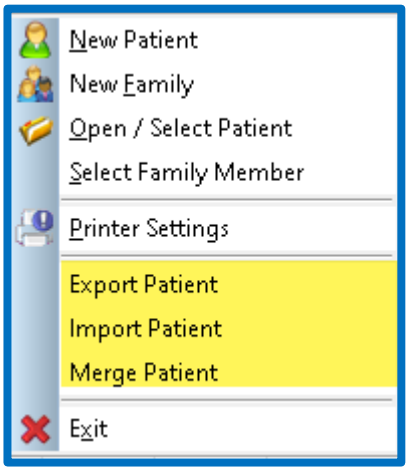
- The Options button allows you to colour code and refine your results displayed.
- You can choose to display them all as one colour or break them down by ranges.
- The tick boxes and bullet point selections are also completely optional.



Patient File Module

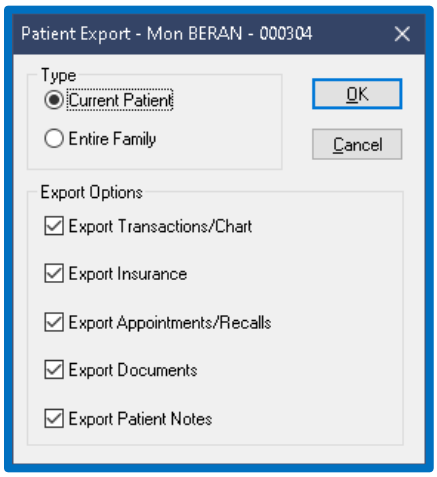
Export/Import & Patient File Merge

Online article: 5.1 - Export & Import Patients - Power Practice



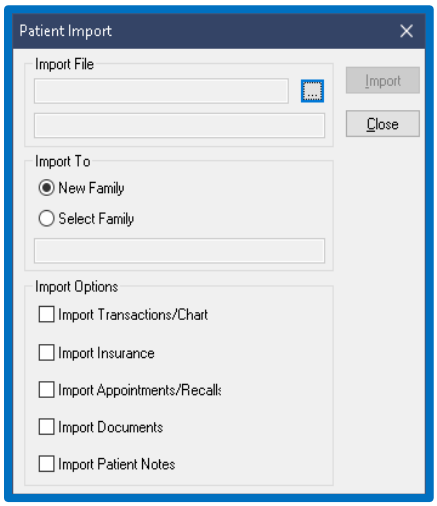
Offices can now export and import patient data with ease. To access these new features:

- Activate the target patient/family account.
- Visit the Patient Module.
- Right click anywhere in the background of the module.
- Select the File option, then Export, Import or Merge patient file.



Export

- You can choose to export the active patient, or the entire family at once.
- All tick boxes offered should be included as to maximize the accuracy of the patient file.
- The program will prompt you to Email the exported file immediately. This is a good option if you wish to send it to another office or store it in a new directory.
- Your exported patient or family data will default to saving in the data in your C:\Powerptx\Export folder.



Import

- The import process is very similar to the Export, we simply need to direct the program to the exported family file.
- You can designate where to add this new file, as an entirely new family or as members of an existing file.
- The family should be imported with the same settings that were used during export; typically, we include all tick boxes.
- After pressing Import, the file will be available in your system in the same state as it was exported from the other database.

Items not included in the export/import process: the dollar value of Payments/Charges/Adjustments (imported as $0 records), Ortho plans, Proposals, Links between Appointment and Recalls (your R lines will be red & unlinked), and finally Patient Forms (these can be exported/imported separately).

Merge

Online article: 5.1 - Patient Merge - Power Practice

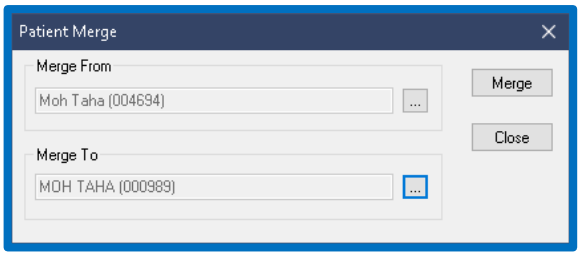
You can now combine two files in your database into one. This will be useful when tidying up your database of duplicate files. This option is best used when a patient has little to no information on one file, but a lot of history on the other. The utility was primarily designed to handle simple consolidation of duplicate files into a main master file so there are some key points to consider below.

Please note you cannot merge a patient file if they are already part of a family account which has Payments and Adjustment records. This is to preserve the ledger and A/R integrity of all accounts involved. A workaround method for such a patient, if desired, is to move them into their own family file first, then use the merge function.

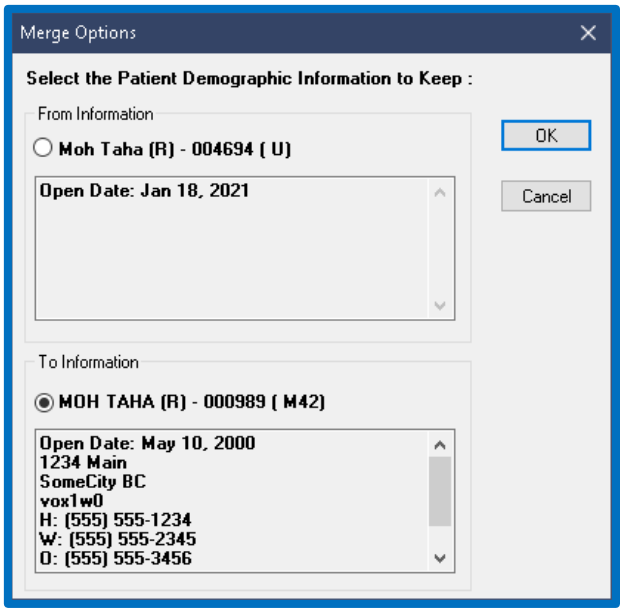
Single files can be merged into a family account without issue. They just cannot come from a family file with payments and adjustments on record.

Second, the patient files involved in the merge cannot have outstanding Check Out data to be processed.

The Merge operation will present the window shown on the right.



- You can set the From field to the patient file you wish to incorporate/absorb.
- Then set the Merge To field to the "good" file, the file you wish to keep.
- Once you press Merge the Merge Options window shown below is presented.
- Here you must select the demographic info (address, phone number etc.) you wish to keep.
- With your bullet selection set appropriately, press Ok to complete the operation.



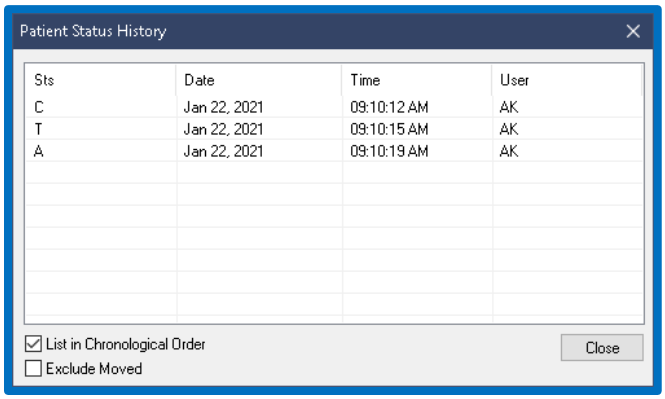
Patient Status Report

Online article: [5.1 - Patient Status Report - Power Practice]

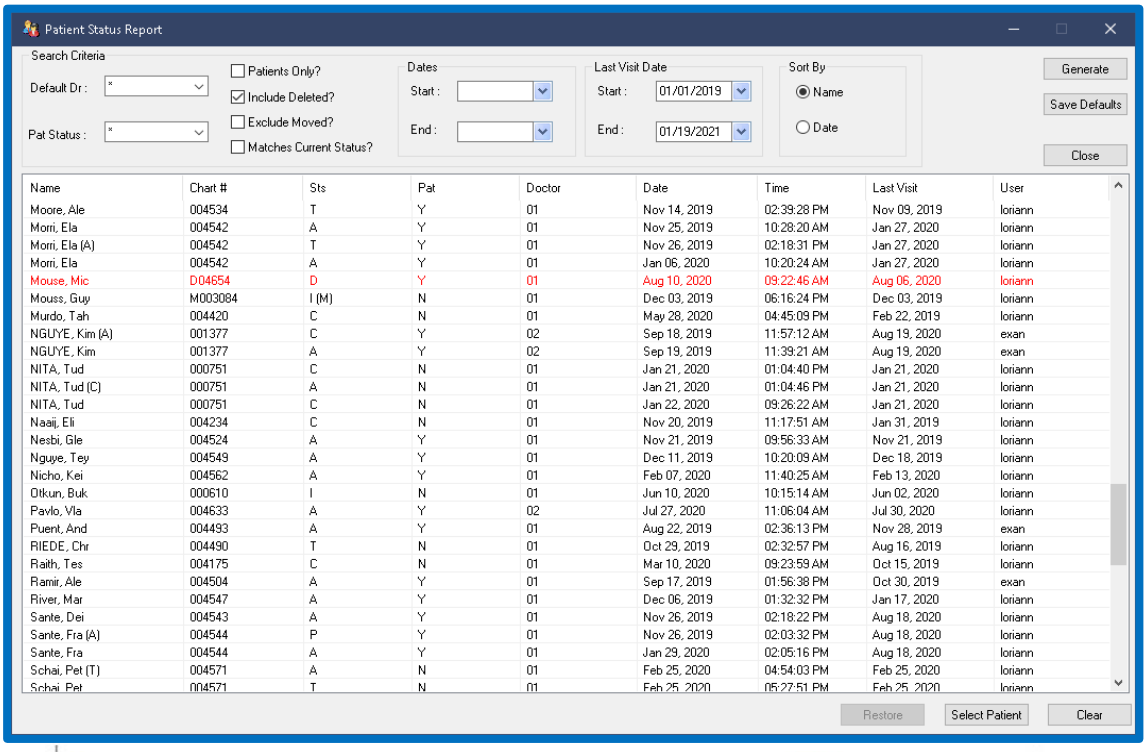
The Patient Status Report added in version 5.0 has been updated in this release. You can use it to track patient status changes via an individual Audit Trail, find and restore deleted patients, or use it to track Last Visit Dates.

To access this report, visit the Patient File Module and click on the open folder icon shown below. The window shown on the right will appear. Select Patient Status in the list.

- The tick box options help you narrow your search results down. You can filter the report by patient default Dr. or by patient status.
- You can still use this report to restore deleted patient files by highlighting the red line and clicking the Restore button. You will need the daily password code from Support.
- The Date fields will allow you to restrict the results to only include the status changes made within the designated date range.
- The Last Visit Date filter is now available for use in this report as well.



- This report also offers a Status History option in the right click menu, shown in the image above. You can review the history of status changes there.
- You can also access the Status History via right click menu anywhere in the Patient File module.

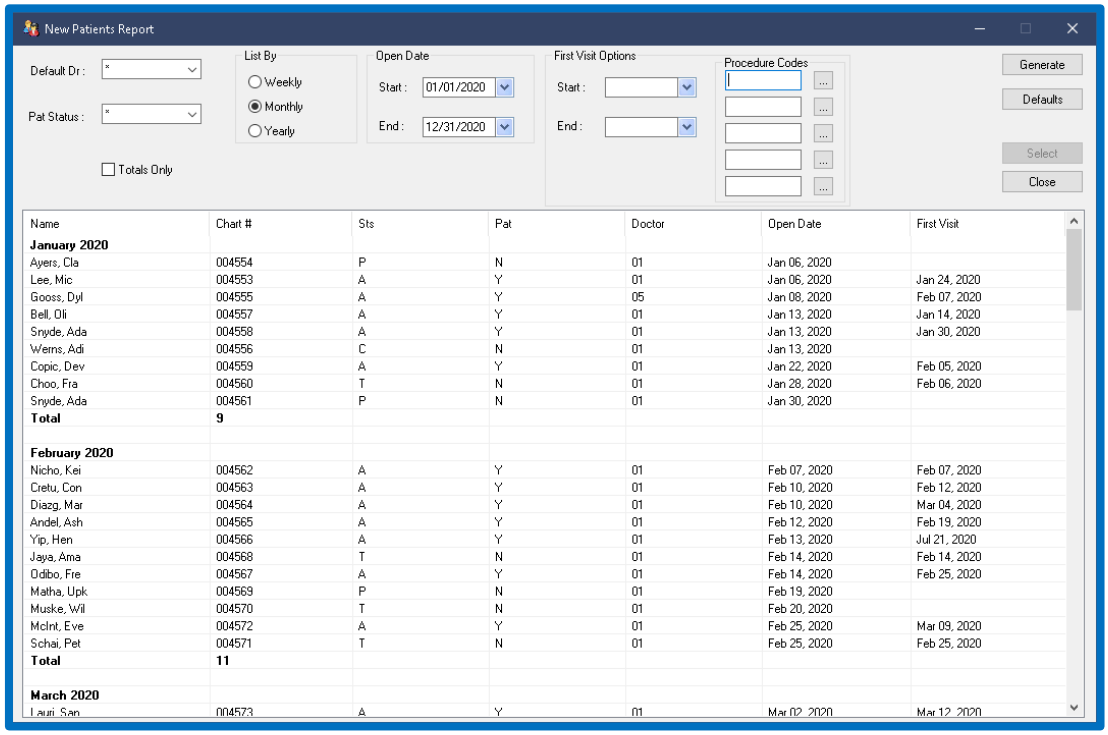


Name	Chart #	Sts	Pat	Doctor	Date	Time	Last Visit	User
Moore, Ale	004534	T	Y	01	Nov 14, 2019	02:39:28 PM	Nov 09, 2019	loriann
Morri, Ela	004542	A	Y	01	Nov 25, 2019	10:28:20 AM	Jan 27, 2020	loriann
Morri, Ela (A)	004542	T	Y	01	Nov 26, 2019	02:18:31 PM	Jan 27, 2020	loriann
Morri, Ela	004542	A	Y	01	Jan 06, 2020	10:20:24 AM	Jan 27, 2020	loriann
Mouse, Mic	D04654	D	Y	01	Aug 10, 2020	09:22:46 AM	Aug 06, 2020	loriann
Mouss, Guy	M003084	I (M)	N	01	Dec 03, 2019	06:16:24 PM	Dec 03, 2019	loriann
Murdo, Tah	004420	C	N	01	May 28, 2020	04:45:09 PM	Feb 22, 2019	loriann
NGUYE, Kim (A)	001377	C	Y	02	Sep 18, 2019	11:57:12 AM	Aug 19, 2020	exan
NGUYE, Kim	001377	A	Y	02	Sep 19, 2019	11:39:21 AM	Aug 19, 2020	exan
NITA, Tud	000751	C	N	01	Jan 21, 2020	01:04:40 PM	Jan 21, 2020	loriann
NITA, Tud (C)	000751	A	N	01	Jan 21, 2020	01:04:46 PM	Jan 21, 2020	loriann
NITA, Tud	000751	C	N	01	Jan 22, 2020	09:26:22 AM	Jan 21, 2020	loriann
Naaij, Eli	004234	C	N	01	Nov 20, 2019	11:17:51 AM	Jan 31, 2019	loriann
Nesbi, Gle	004524	A	Y	01	Nov 21, 2019	09:56:33 AM	Nov 21, 2019	loriann
Nguye, Tey	004549	A	Y	01	Dec 11, 2019	10:20:09 AM	Dec 18, 2019	loriann
Nicho, Kei	004562	A	Y	01	Feb 07, 2020	11:40:25 AM	Feb 13, 2020	loriann
Otkun, Buk	000610	I	N	01	Jun 10, 2020	10:15:14 AM	Jun 02, 2020	loriann
Pavlo, Vla	004633	A	Y	02	Jul 27, 2020	11:06:04 AM	Jul 30, 2020	loriann
Puent, And	004493	A	Y	01	Aug 22, 2019	02:36:13 PM	Nov 28, 2019	exan
RIEDE, Chr	004490	T	N	01	Oct 29, 2019	02:32:57 PM	Aug 16, 2019	loriann
Raith, Tes	004175	C	N	01	Mar 10, 2020	09:23:59 AM	Oct 15, 2019	loriann
Ramir, Ale	004504	A	Y	01	Sep 17, 2019	01:56:38 PM	Oct 30, 2019	exan
River, Mar	004547	A	Y	01	Dec 06, 2019	01:32:32 PM	Jan 17, 2020	loriann
Sante, Dei	004543	A	Y	01	Nov 26, 2019	02:18:22 PM	Aug 18, 2020	loriann
Sante, Fra (A)	004544	P	Y	01	Nov 26, 2019	02:03:32 PM	Aug 18, 2020	loriann
Sante, Fra	004544	A	Y	01	Jan 29, 2020	02:05:16 PM	Aug 18, 2020	loriann
Schai, Pet (T)	004571	A	N	01	Feb 25, 2020	04:54:03 PM	Feb 25, 2020	loriann
Schai, Pet	004571	T	N	01	Feb 25, 2020	05:27:51 PM	Feb 25, 2020	loriann

New Patients Report

Online article: [5.1 - New Patients Report - Power Practice]

The New Patient Report will help you quickly and easily identify your new patient totals based on Weeks, Months or Years. It can be accessed from the same Reports icon we used for the Patient Status Report, the open folder icon found atop the Patient File module.



Name	Chart #	Sts	Pat	Doctor	Open Date	First Visit
January 2020						
Ayers, Cla	004554	P	N	01	Jan 06, 2020	
Lee, Mic	004553	A	Y	01	Jan 06, 2020	Jan 24, 2020
Gooss, Dyl	004555	A	Y	05	Jan 08, 2020	Feb 07, 2020
Bell, Oli	004557	A	Y	01	Jan 13, 2020	Jan 14, 2020
Snyde, Ada	004558	A	Y	01	Jan 13, 2020	Jan 30, 2020
Werns, Adi	004556	C	N	01	Jan 13, 2020	
Copic, Dev	004559	A	Y	01	Jan 22, 2020	Feb 05, 2020
Choo, Fra	004560	T	N	01	Jan 28, 2020	Feb 06, 2020
Snyde, Ada	004561	P	N	01	Jan 30, 2020	
Total	**9**					
February 2020						
Nicho, Kei	004562	A	Y	01	Feb 07, 2020	Feb 07, 2020
Cretu, Con	004563	A	Y	01	Feb 10, 2020	Feb 12, 2020
Diazg, Mar	004564	A	Y	01	Feb 10, 2020	Mar 04, 2020
Andel, Ash	004565	A	Y	01	Feb 12, 2020	Feb 19, 2020
Yip, Hen	004566	A	Y	01	Feb 13, 2020	Jul 21, 2020
Jaya, Ama	004568	T	N	01	Feb 14, 2020	Feb 14, 2020
Odibo, Fre	004567	A	Y	01	Feb 14, 2020	Feb 25, 2020
Matha, Upk	004569	P	N	01	Feb 19, 2020	
Muske, Wil	004570	T	N	01	Feb 20, 2020	
McInt, Eve	004572	A	Y	01	Feb 25, 2020	Mar 09, 2020
Schai, Pet	004571	T	N	01	Feb 25, 2020	Feb 25, 2020
Total	**11**					
March 2020						
Lauri, San	004573	A	Y	01	Mar 02, 2020	Mar 12, 2020

Options:

- You can search by a default Dr. if your clinic sets this field accurately when creating patient files.
- Patient Status types are available as well. You can easily report on how many policy holder files were created, or temporary patients etc. The patient status report discussed previously would be a good place to track the status change history over time.
- Results can be broken down by weeks, months, or years. The image above shows a monthly breakdown.

Reporting Method:

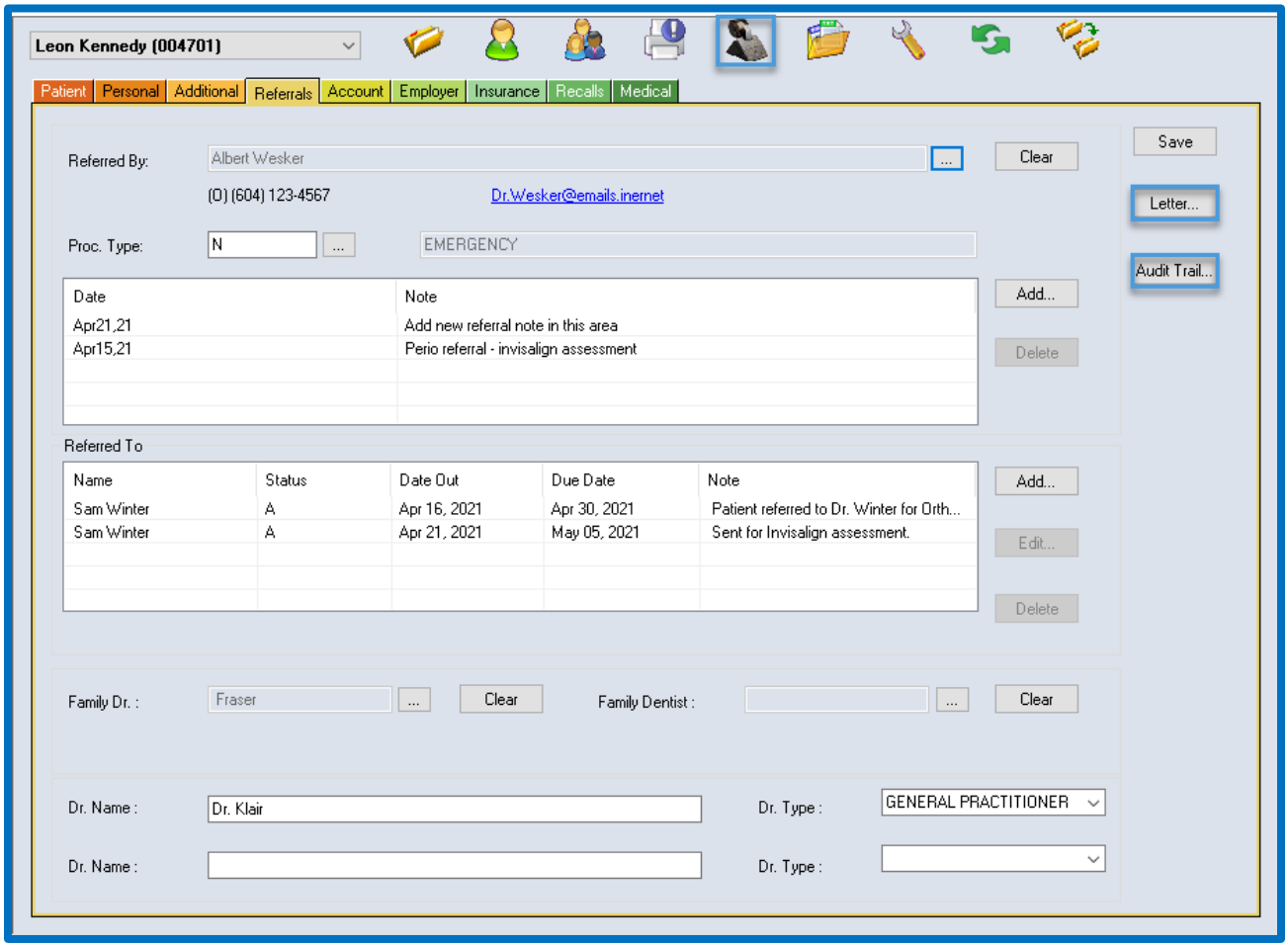
This report offers 3 options for accurately reporting on your new patient:

- Open Date – This method will simply refer to the date when the file was created.
- First Visit – A patient first visit is defined as the date your patient had any Completed status treatment posted on their file.
- Procedure Codes – Finally, the code option allows you to search within a given date range for instances of the codes selected. If you reserve a specific code for new patient visits, this would be the ideal place to use such a code.

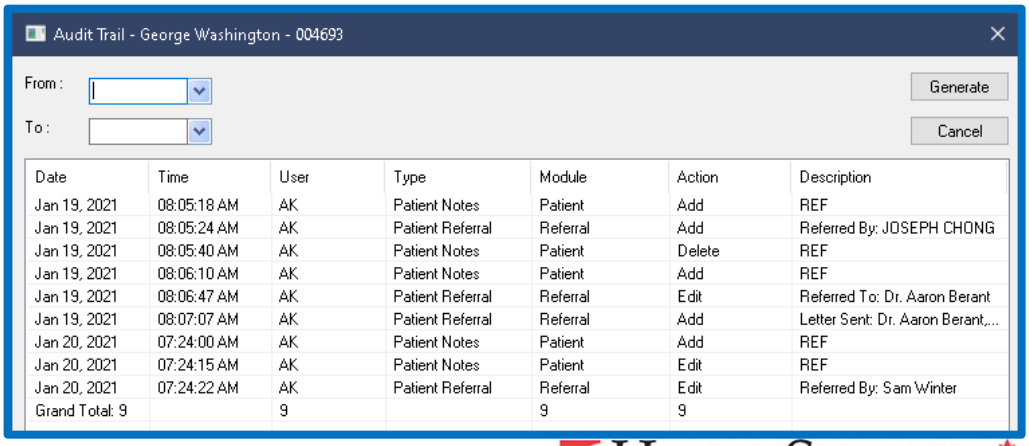
Referrals

Online article: [5.1 - Referral Revamp - Power Practice]

Referral options have been improved in this release. Most of these changes can be found on the Patient Referral tab of the Patient File module.

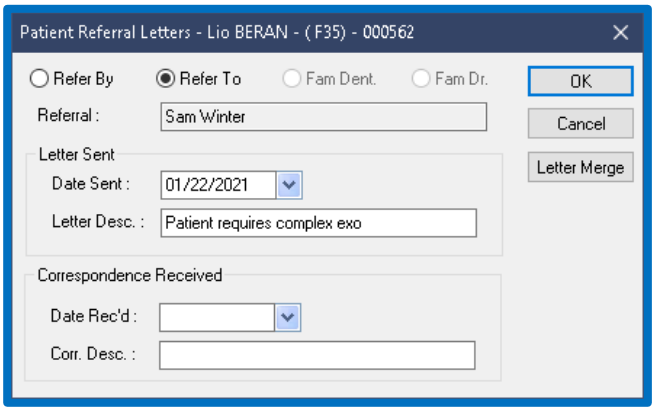


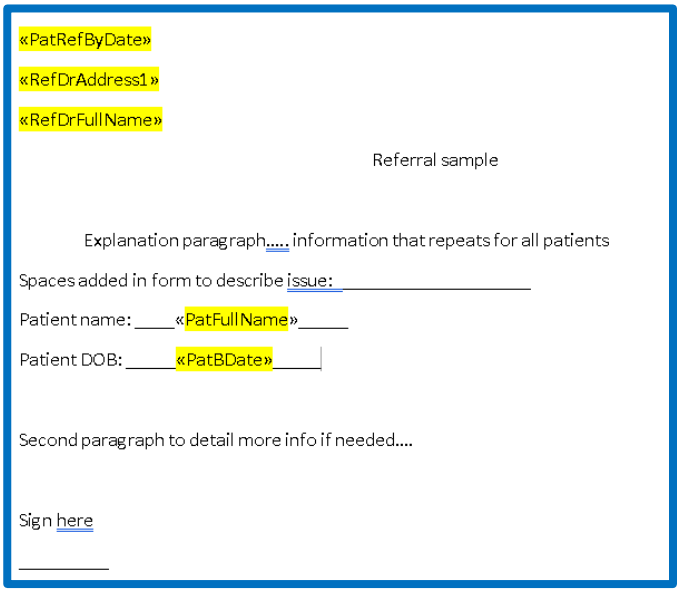
- The Referral tab can now provide an Audit Trail of referral history for each patient; shown below. You can reach this window via the Audit Trail button on the Referral tab, shown in the image above.



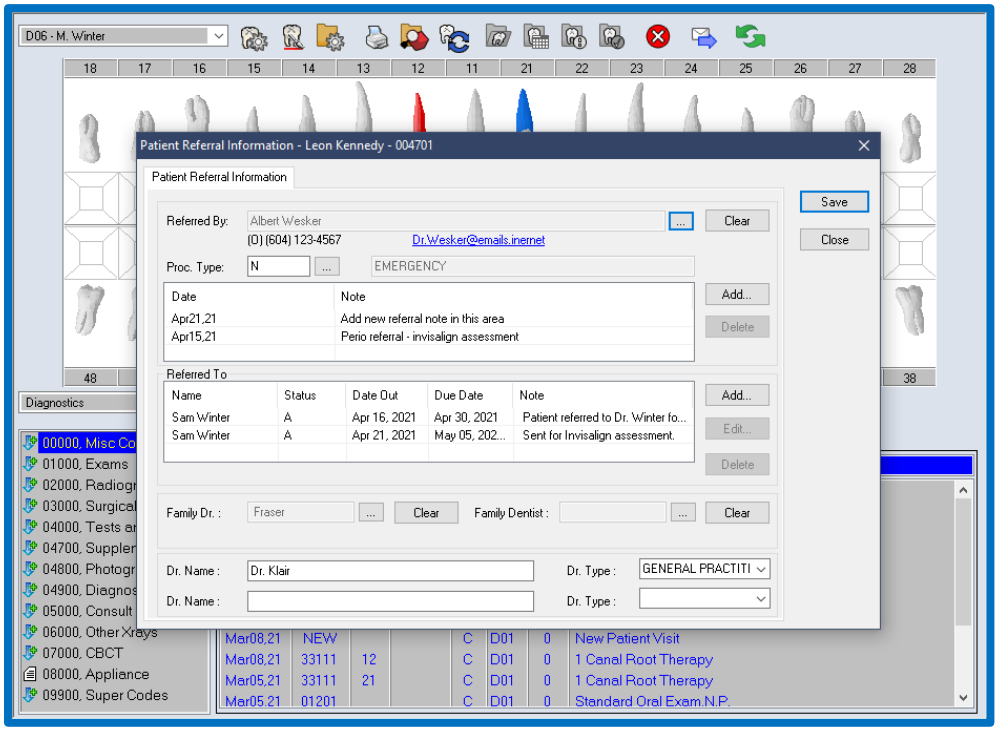
Date	Time	User	Type	Module	Action	Description
Jan 19, 2021	08:05:18 AM	AK	Patient Notes	Patient	Add	REF
Jan 19, 2021	08:05:24 AM	AK	Patient Referral	Referral	Add	Referred By: JOSEPH CHONG
Jan 19, 2021	08:05:40 AM	AK	Patient Notes	Patient	Delete	REF
Jan 19, 2021	08:06:10 AM	AK	Patient Notes	Patient	Add	REF
Jan 19, 2021	08:06:47 AM	AK	Patient Referral	Referral	Edit	Referred To: Dr. Aaron Berant
Jan 19, 2021	08:07:07 AM	AK	Patient Referral	Referral	Add	Letter Sent: Dr. Aaron Berant,...
Jan 20, 2021	07:24:00 AM	AK	Patient Notes	Patient	Add	REF
Jan 20, 2021	07:24:15 AM	AK	Patient Notes	Patient	Edit	REF
Jan 20, 2021	07:24:22 AM	AK	Patient Referral	Referral	Edit	Referred By: Sam Winter
Grand Total: 9		9		9	9	

- The Audit Trail will track new entries, notes, deletions, edits, and letters sent.
- The Referral Manager module can now print labels using the familiar label icon.





- Letter merges have been improved and expanded. You can now send Referral letters to the Referred By source, the Referred To source, Family Dentist and Family Doctor. These actions are all recorded in the Audit Trail. The Letter Merge feature is now available for all these options.
- The image above demonstrates the Letter Merge function in action.
- The data merge fields are highlighted in yellow for demonstration purposes only.



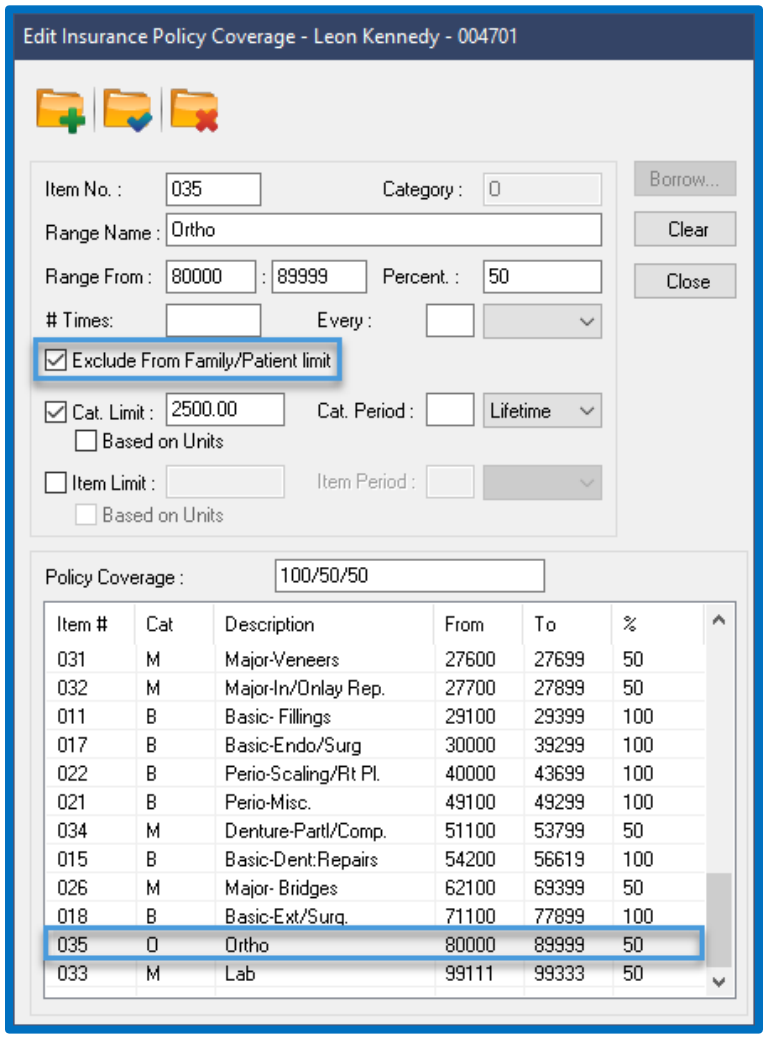
- You can now also manage your referral from the Odontogram. This option is found under the right click menu while using the Odontogram.

- As you can see, the module is fully accessible and functional, even when accessed indirectly via the Odontogram.

Exclude Item Fees from Patient Insurance Limit

Online article: 5.1 - Separate Ortho Patient Limit - Power Practice

Insurance coverage templates can now be updated to restrict certain items from reducing the overall patient insurance limit. This is a great option for insurance limits which affect an item limit but not the overall insurance balance.



To apply this setting:

- Visit the Patient File module.
- Visit the Insurance tab.
- Select the Coverage button.
- Highlight any line item to see the details.

If you are unfamiliar with this window, the Coverage button houses the templates from which patient/insurance splits are determined. Each line covers a range of codes and applies a coverage percentage estimate.

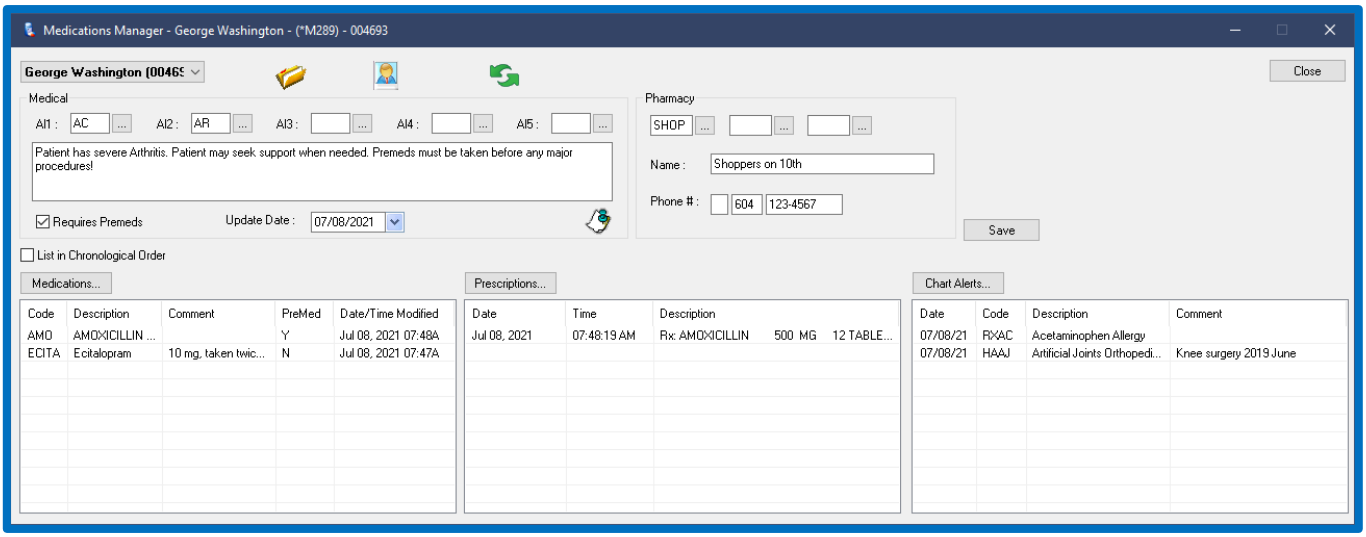
You can limit an item line or even an entire category using the tick box options along with some values.
In this image we see the Ortho line has been given a Category limit of 2500. It has also been set to not affect the overall patient/ins limits.

You can enable the check box for “Exclude from Family/Patient Limit on any line you wish.

Medication Manager

Online Video: Medications Module (Video) - Power Practice

The Medication module was added in version 5.0. It provides a unified health history profile for your patients. You can find this module under the Patient dropdown menu in the upper left of the program.



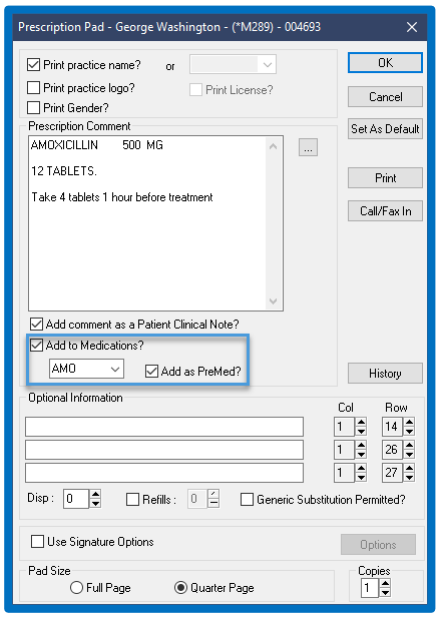
Gathering information that used to be scattered around the patient file, the new Medications Manager makes tracking patient health history a much simpler affair.

Alerts:

- Alerts 1-5 are the standard alerts previously found in the patient's Medical tab.

Pharmacy:

- The pharmacy information area has also been included in this module to further simplify medical information entry.



Medications:

- New to Power Practice, you can now track patient Medications and include detailed notes about them.

Prescriptions:

- The traditional Prescriptions function has also been migrated to this new module.
- You can also set your prescription to automatically add the information to the Medications list.

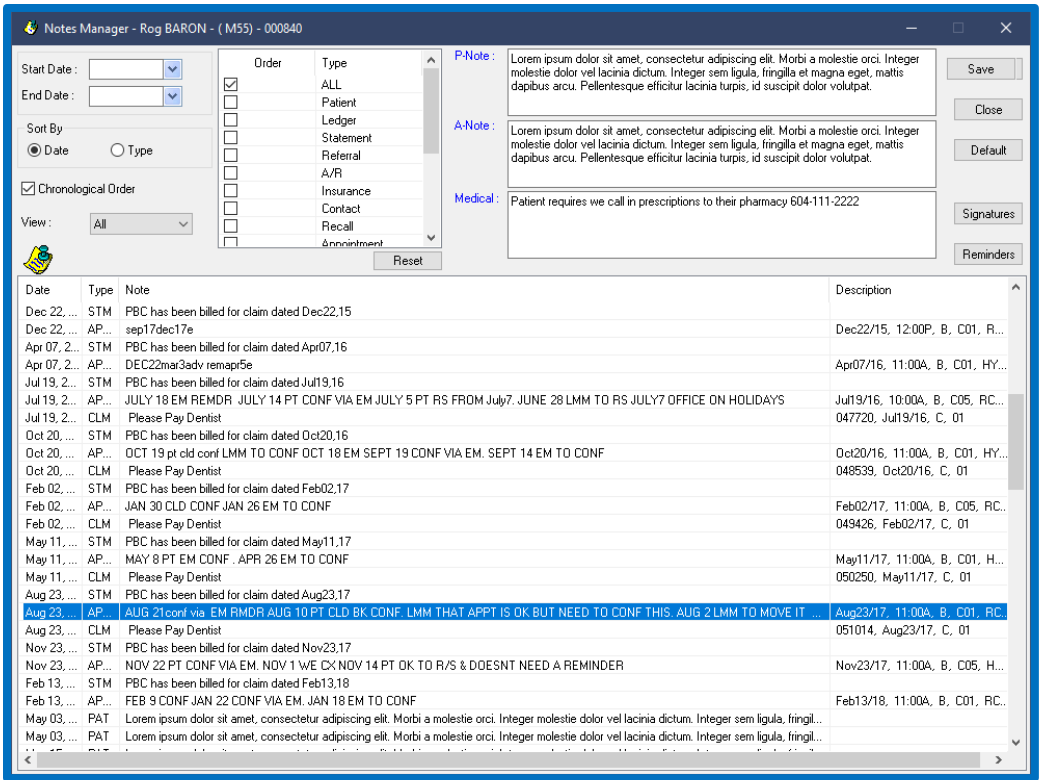
Chart Alerts:

- If your clinic uses the Power Chart module, the Chart Alerts system included will also be accessible from here.
- If you do not have Power Chart, this button will be grayed out.

Notes Manager

Online Video: Version 5 - Power Practice (Discussed in the 5.0 New Module and Patient Enhancements video)

Added in version 5.0, the Notes Manager module is a new, centralized location for tracking patient notes.



This module will allow you to search for notes by date and type, as well as presenting the P-note, A-note and Medical notes by default. The date fields are available in the upper left, accompanied by the tick boxes representing all the different note types available across the program.

It is a rather straightforward and simple to use module, but the video linked above will cover all the options available in much more detail if you would like to find out more.

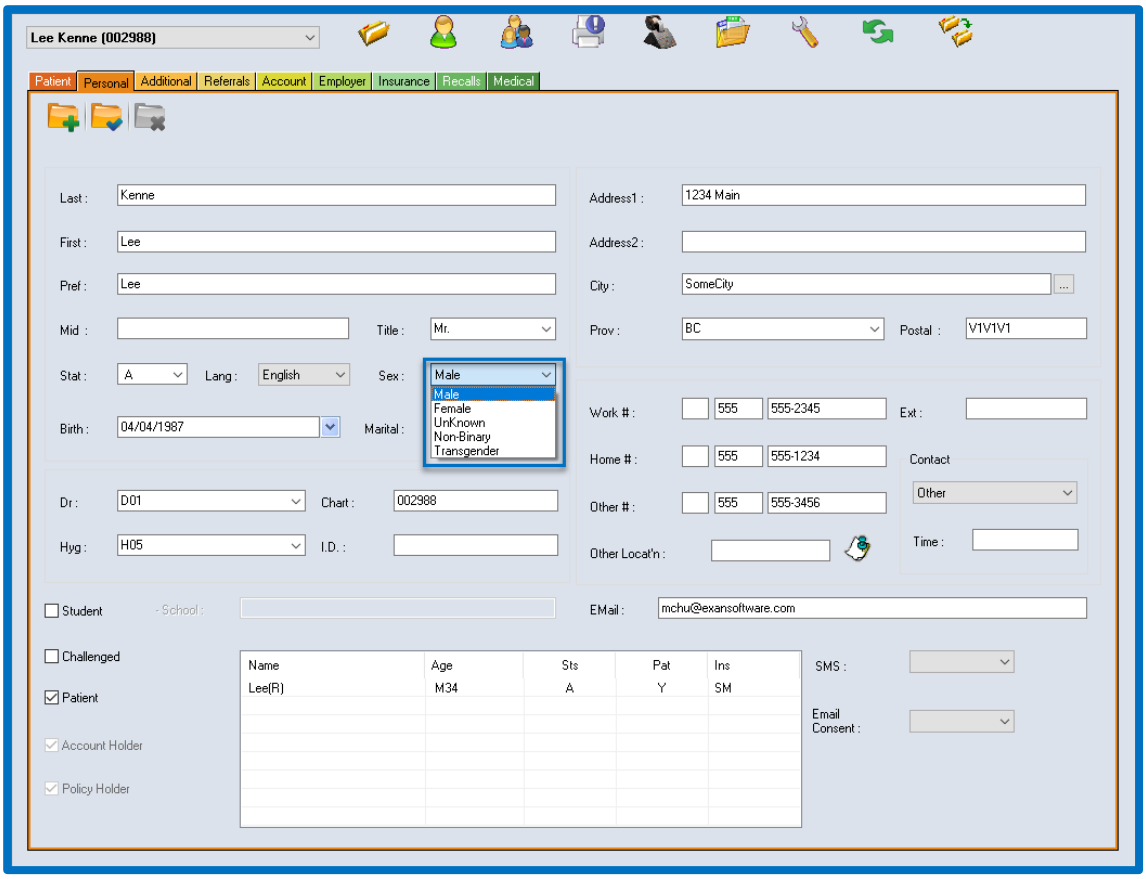
Signatures

Available on the far-right side, the Signatures button will link you to the new Signature Manager Report, another new addition from 5.0. You can read up on it by following any of the articles linked below:

Setup Digital Signatures - Power Practice
Creating User Signatures - Power Practice
Use Digital Signatures on Clinical Notes - Power Practice
Mark Notes for Review - Power Practice
Signatures Report - Power Practice

Transgender & Non-Binary Status

You now have the option to set the patient's Gender to Transgender, Non-Binary or Unknown. These options will be found in the Patient File module, under the Personal tab where we setup all the other personal details like birthdate, contact info and patient demographics.



Please note: *CDAnet currently requires the gender field be filled in and only recognizes Male or Female. This means insurance submissions for patients set to any other gender will likely be rejected.*

There is a chance EDI submission may no longer require a Gender designation as of March 2022. However, Power Practice has no control or influence over this decision, nor can we be certain of its delivery timeline.

Patient File Module Minor Changes:

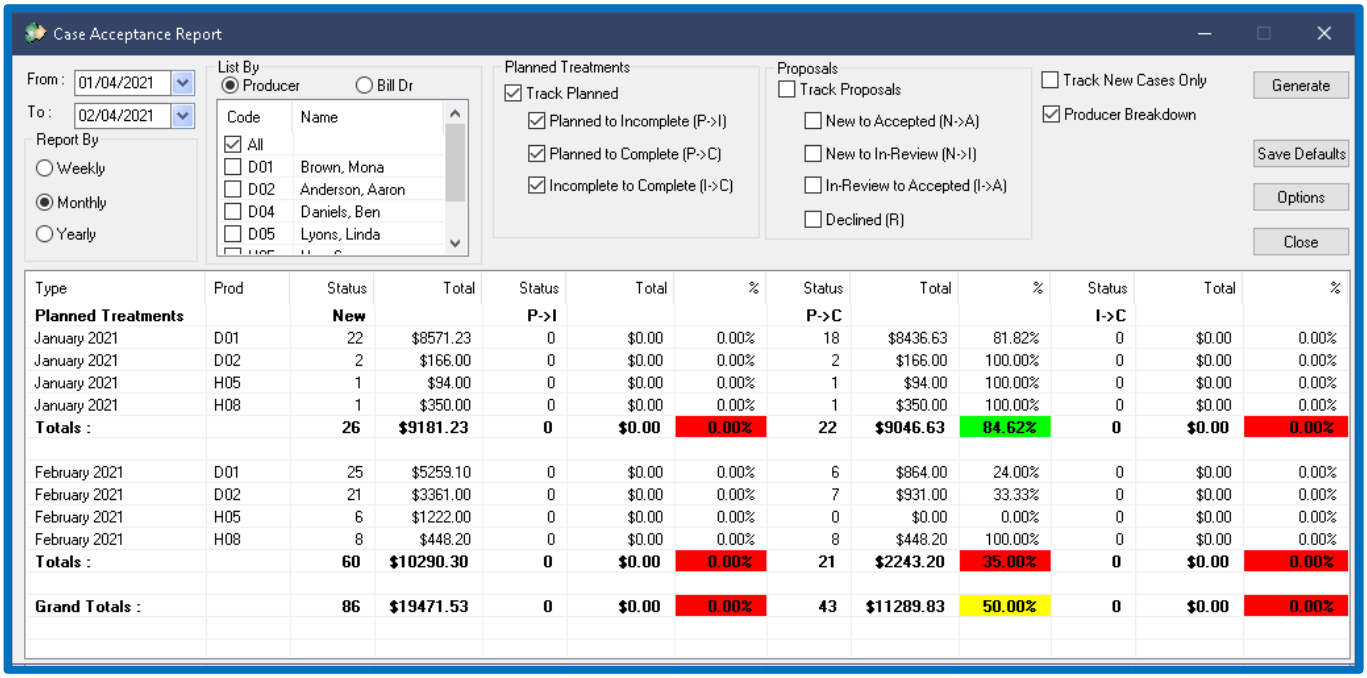
- Moved patients will now carry along all their Planned treatments.
- Patient Proposals will also follow moved patients.
- The Patient Alerts report can now be run with only the Pre-med option selected.
- As of version 5.1, user settings for the Patient File module can be set to "blank" or no selection as to avoid unintentionally assigning default producers to new patients. These options start blank and allow you to fill them in manually now. You do not need to set a default hygienist, *but you will still be required to set a Default Dr*.
- Alert History printouts will now include the patient's name.

Transactions Module

Case Acceptance Report

Online article: 5.1 - Case Acceptance Report - Power Practice

The new Case Acceptance Report will clearly display the acceptance rates for Planned and Proposed treatments.
The image below displays the report when run to show Planned statistics. You can access this report via the Month End Tasks icon atop the Transactions window.



Type	Prod	Status	Total	Status	Total	%	Status	Total	%	Status	Total	%
Planned Treatments		**New**		**P->I**			**P->C**			**I->C**		
January 2021	D01	22	$8571.23	0	$0.00	0.00%	18	$8436.63	81.82%	0	$0.00	0.00%
January 2021	D02	2	$166.00	0	$0.00	0.00%	2	$166.00	100.00%	0	$0.00	0.00%
January 2021	H05	1	$94.00	0	$0.00	0.00%	1	$94.00	100.00%	0	$0.00	0.00%
January 2021	H08	1	$350.00	0	$0.00	0.00%	1	$350.00	100.00%	0	$0.00	0.00%
Totals :		**26**	**$9181.23**	**0**	**$0.00**	**0.00%**	**22**	**$9046.63**	**84.62%**	**0**	**$0.00**	**0.00%**
February 2021	D01	25	$5259.10	0	$0.00	0.00%	6	$864.00	24.00%	0	$0.00	0.00%
February 2021	D02	21	$3361.00	0	$0.00	0.00%	7	$931.00	33.33%	0	$0.00	0.00%
February 2021	H05	6	$1222.00	0	$0.00	0.00%	0	$0.00	0.00%	0	$0.00	0.00%
February 2021	H08	8	$448.20	0	$0.00	0.00%	8	$448.20	100.00%	0	$0.00	0.00%
Totals :		**60**	**$10290.30**	**0**	**$0.00**	**0.00%**	**21**	**$2243.20**	**35.00%**	**0**	**$0.00**	**0.00%**
Grand Totals :		**86**	**$19471.53**	**0**	**$0.00**	**0.00%**	**43**	**$11289.83**	**50.00%**	**0**	**$0.00**	**0.00%**

Report settings:

- The date range and Report By options help you focus your report on exactly what you need.
- The list can be run by Producer or Billing Doctor to match your current clinical practices, and it can be run for all Producers or just a select few.

Planned Treatment:

- The primary checkbox, Track Planned, must be included.
- You have the option of including the different transition stages of a planned treatment to best suite your Office practices. If your office does not use the Incomplete status, for example, you should not include it in your report. This case is demonstrated in the image above wherein the P->I columns are completely empty.

Proposals:

- The primary checkbox, Track Proposals, must be included.
- The 4 different options encapsulate all stages of a Proposal so you can easily find exactly what you need.
- Track New Cases Only will exclude any proposals created outside of the designated date range.
- Producer Breakdown will present the data with the producer's associated to it. This is highly recommended if you wish to review each producers planned or proposed delivery rate. Leaving this option disabled will simply present the results of all producers combined.

Options:

- The settings in here will help you colour-code your results.
- You can define up to 3 ranges based on financial targets.
- You can also setup to 3 ranges based on acceptance percentage.

Editing Treatment Producer

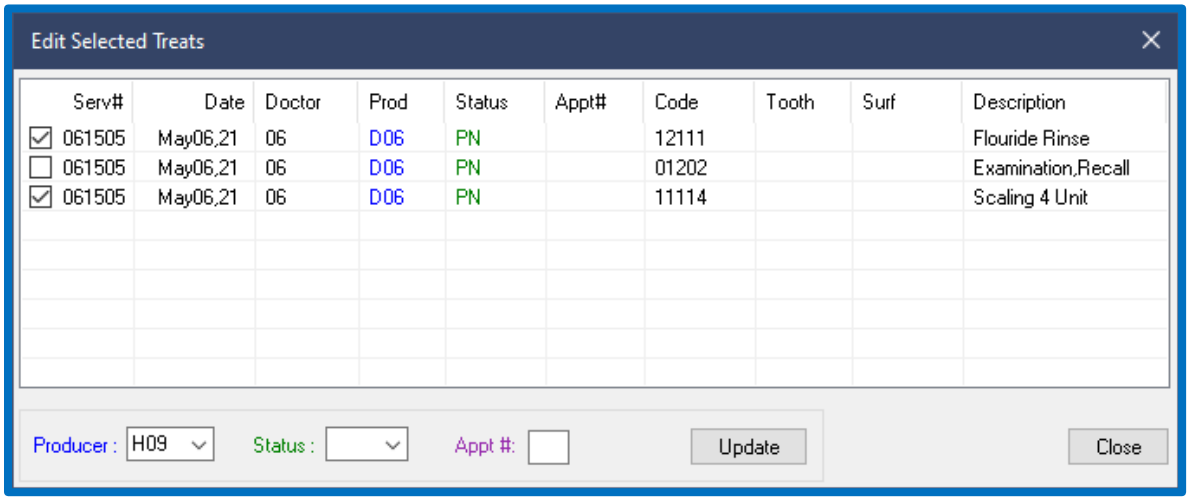
Online article: 5.1 - Changing Producers for Planned and Incomplete treatments - Power Practice

You can now edit the producer on Planned treatments instead of deleting and re-entering the data.

You can edit individual lines but simply double clicking them or choosing Edit Treats from the right click menu.

To Edit multiple lines:

- Left click your first treatment.
- Hold the Control key and left click the next item, repeating until all items are highlighted.
- Right click the collection and choose Edit Selected.
- A new window appears with options across the bottom for editing the Producer, Status and Appt#.
- Note how the check boxes can be used to identify which items are to be changed when the Update button is pressed.

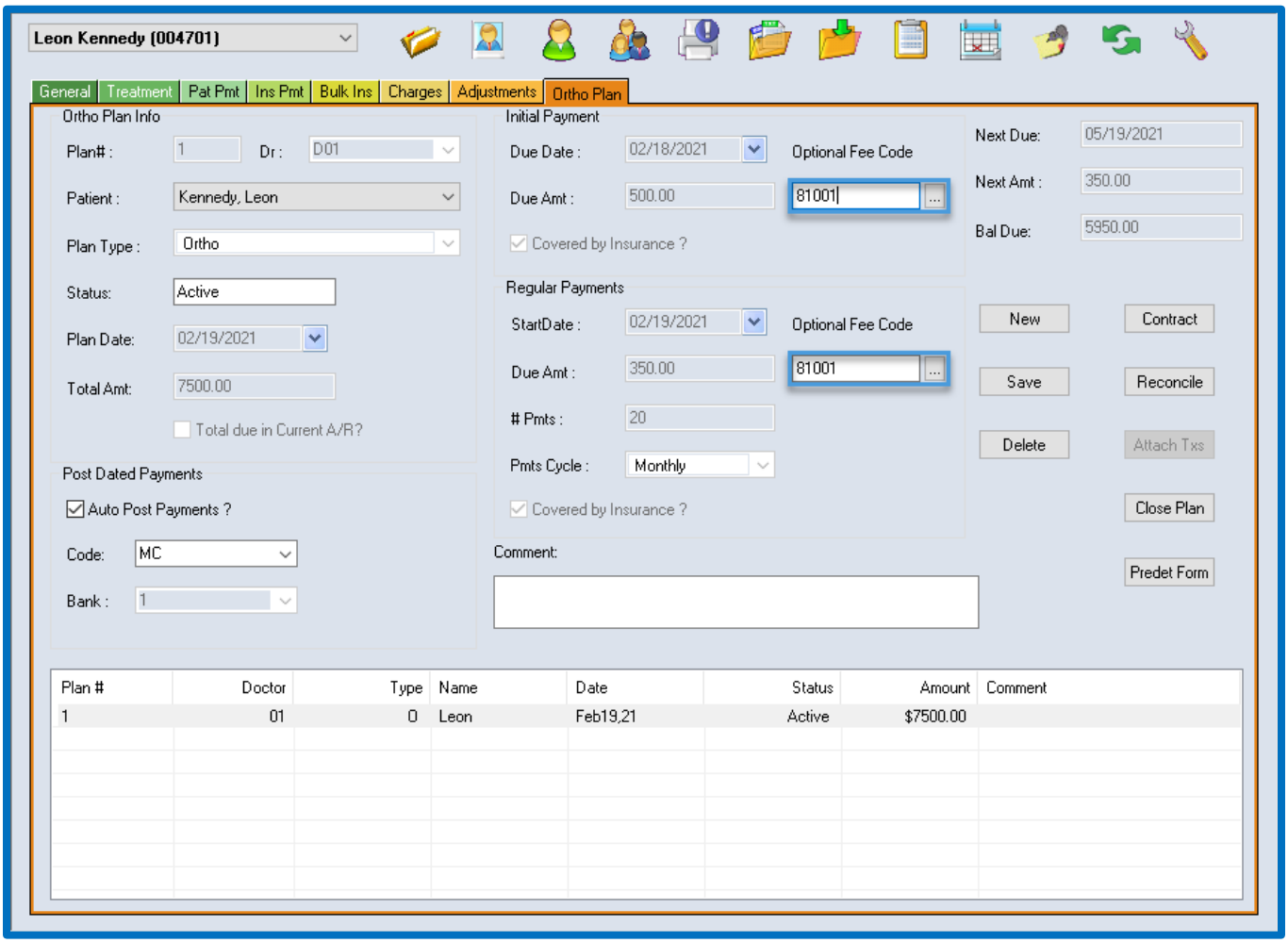


Optional Ortho Plan Fee Codes

Online article: 5.1 - Optional Ortho Codes - Power Practice

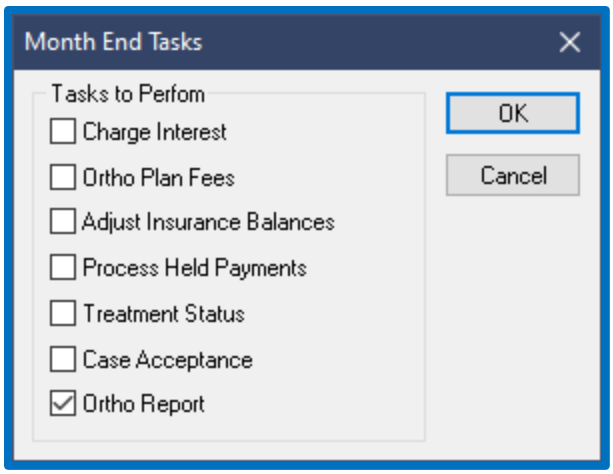
Ortho plans can now be setup to use an alternative fee code. This is to accommodate provinces with multiple or varying Ortho codes.

- So long as you set a code in the Optional Fee Code boxes, the program will differ to using those instead of the standard ortho codes.
- You can enter any codes you want into those fields, just be mindful of insurance submissions and coverage; the insurance will likely only cover the “proper” ortho fee codes for your province.
- You can set a unique code for the Initial Payment and the Regular Payments or repeat the same one. Again, the insurance coverage practices will act as your guiding hand.
- Filling in these fields negates the use of the standard 93331-93333 codes.
- Be sure to only fill these fields in if you need them, otherwise, leave them blank.



Ortho Report

Online article: 5.1 - Ortho Report - Power Practice

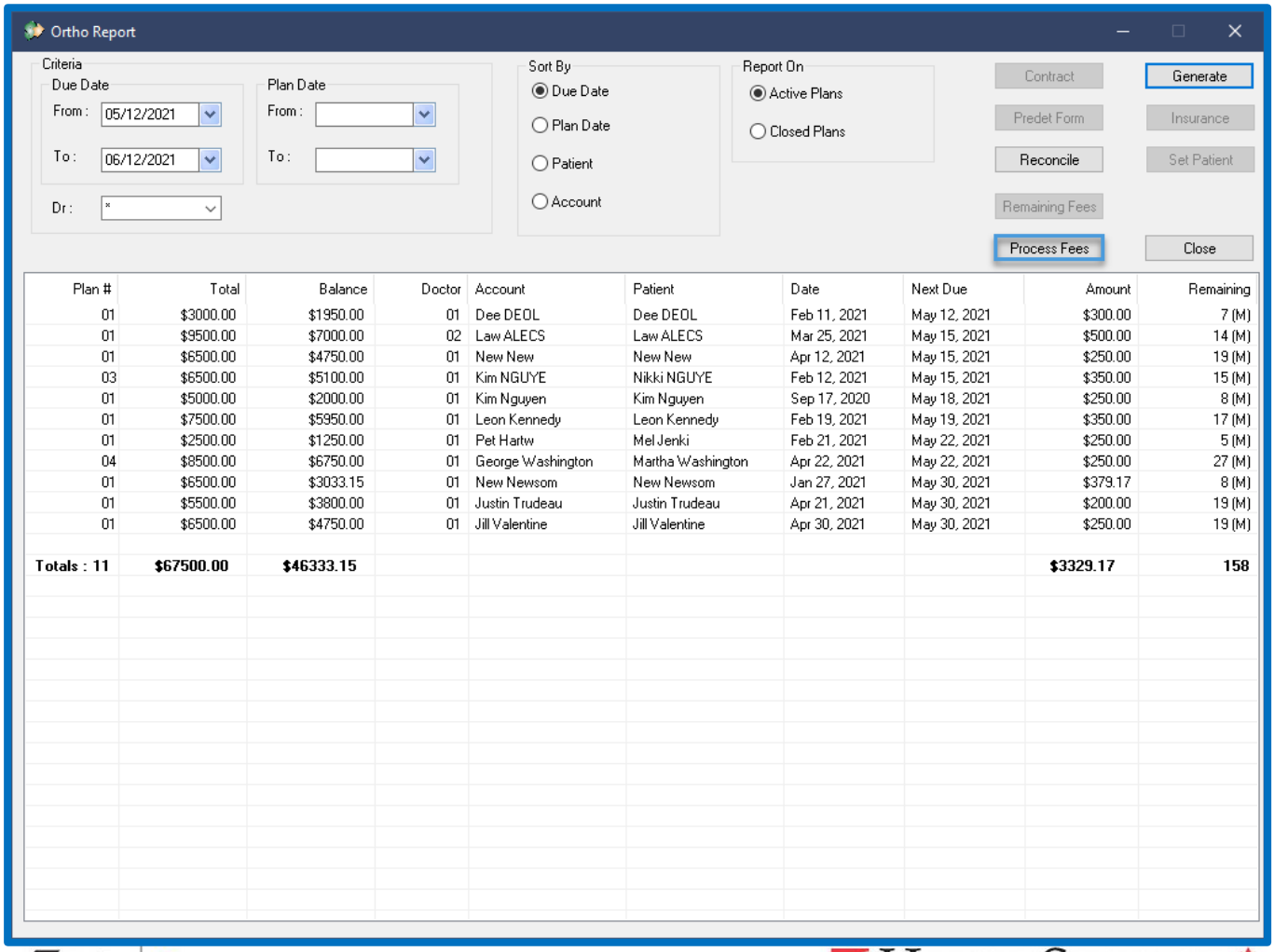


The newly added Ortho report will allow you to explore all your plans, be they active or closed. It will also allow you to process new fees, reconcile payment history, and print claim forms for submission.

You can access this report from the Transactions module, under the Month End Tasks icon in the upper right corner of the module window.

This report will significantly improve your team's Ortho plan management practices. It provides an easy to use searching method which can be filtered and sorted in a few ways; filters can be applied to Doctors, Ortho Fee Due Dates and whether they are active or closed plans.

You can even Process Fees from this report directly using the Process Fees button. This will serve the same function as the Ortho Plan Fees typically used to process outstanding monthly ortho charges.



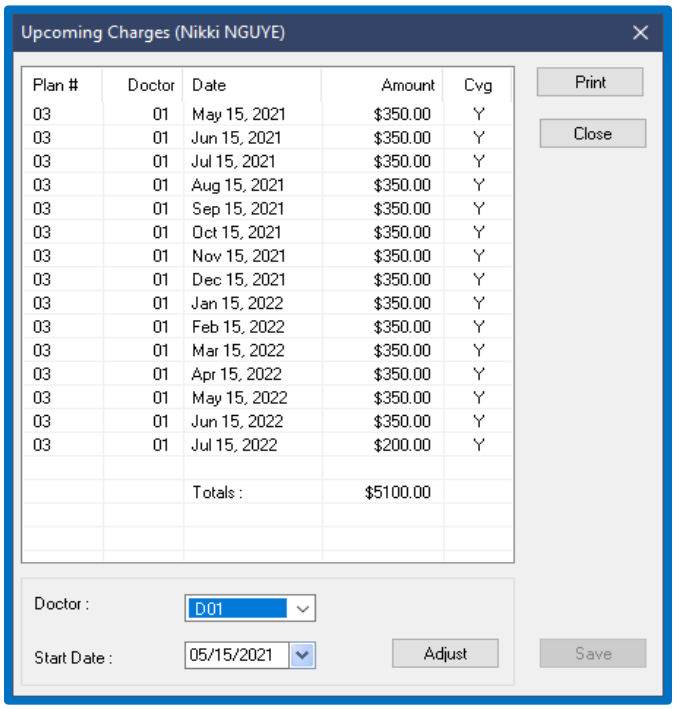
Plan #	Total	Balance	Doctor	Account	Patient	Date	Next Due	Amount	Remaining
01	$3000.00	$1950.00	01	Dee DEOL	Dee DEOL	Feb 11, 2021	May 12, 2021	$300.00	7 (M)
01	$9500.00	$7000.00	02	Law ALECS	Law ALECS	Mar 25, 2021	May 15, 2021	$500.00	14 (M)
01	$6500.00	$4750.00	01	New New	New New	Apr 12, 2021	May 15, 2021	$250.00	19 (M)
03	$6500.00	$5100.00	01	Kim NGUYE	Nikki NGUYE	Feb 12, 2021	May 15, 2021	$350.00	15 (M)
01	$5000.00	$2000.00	01	Kim Nguyen	Kim Nguyen	Sep 17, 2020	May 18, 2021	$250.00	8 (M)
01	$7500.00	$5950.00	01	Leon Kennedy	Leon Kennedy	Feb 19, 2021	May 19, 2021	$350.00	17 (M)
01	$2500.00	$1250.00	01	Pet Hartw	Mel Jenki	Feb 21, 2021	May 22, 2021	$250.00	5 (M)
04	$8500.00	$6750.00	01	George Washington	Martha Washington	Apr 22, 2021	May 22, 2021	$250.00	27 (M)
01	$6500.00	$3033.15	01	New Newsom	New Newsom	Jan 27, 2021	May 30, 2021	$379.17	8 (M)
01	$5500.00	$3800.00	01	Justin Trudeau	Justin Trudeau	Apr 21, 2021	May 30, 2021	$200.00	19 (M)
01	$6500.00	$4750.00	01	Jill Valentine	Jill Valentine	Apr 30, 2021	May 30, 2021	$250.00	19 (M)
Totals : 11	**$67500.00**	**$46333.15**						**$3329.17**	**158**

Updating Ortho Plan Doctor

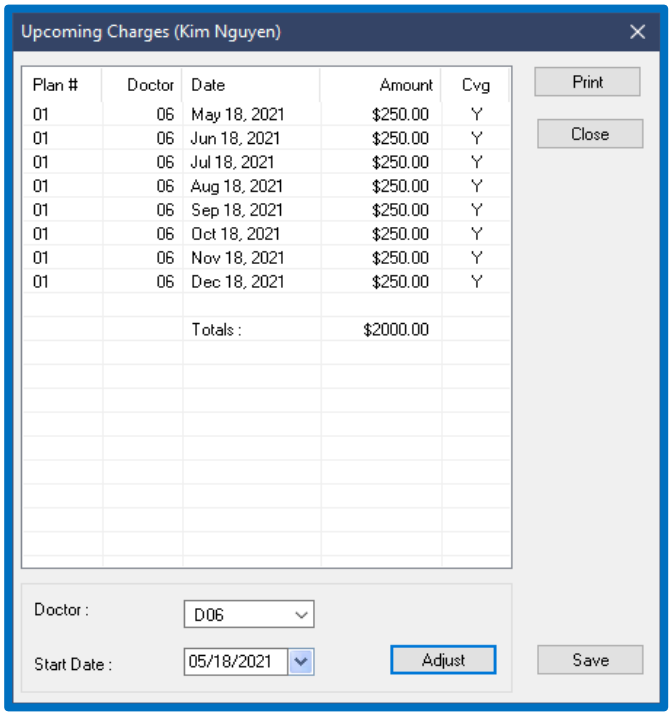
Online article: 5.1 - Ortho Report - Power Practice (see steps 27-28)

In this version, Ortho plans can even have their designated Producer changed without the need to close the entire plan and recreate it.

- Select a patient from the results list.
- Select the Remaining Fees button.
- Set the dropdown to your new Doctor.
- Select the date this change should take effect.
- Select Adjust.
- Save and confirm your action.



Plan #	Doctor	Date	Amount	Cvg
03	01	May 15, 2021	$350.00	Y
03	01	Jun 15, 2021	$350.00	Y
03	01	Jul 15, 2021	$350.00	Y
03	01	Aug 15, 2021	$350.00	Y
03	01	Sep 15, 2021	$350.00	Y
03	01	Oct 15, 2021	$350.00	Y
03	01	Nov 15, 2021	$350.00	Y
03	01	Dec 15, 2021	$350.00	Y
03	01	Jan 15, 2022	$350.00	Y
03	01	Feb 15, 2022	$350.00	Y
03	01	Mar 15, 2022	$350.00	Y
03	01	Apr 15, 2022	$350.00	Y
03	01	May 15, 2022	$350.00	Y
03	01	Jun 15, 2022	$350.00	Y
03	01	Jul 15, 2022	$200.00	Y
		Totals :	$5100.00	



Plan #	Doctor	Date	Amount	Cvg
01	06	May 18, 2021	$250.00	Y
01	06	Jun 18, 2021	$250.00	Y
01	06	Jul 18, 2021	$250.00	Y
01	06	Aug 18, 2021	$250.00	Y
01	06	Sep 18, 2021	$250.00	Y
01	06	Oct 18, 2021	$250.00	Y
01	06	Nov 18, 2021	$250.00	Y
01	06	Dec 18, 2021	$250.00	Y
		Totals :	$2000.00	

The options offered by this report allow you to manage your Ortho plans comprehensively from this central hub.

So long as the plan has been created in the Transactions module Ortho tab, you can use this report to:

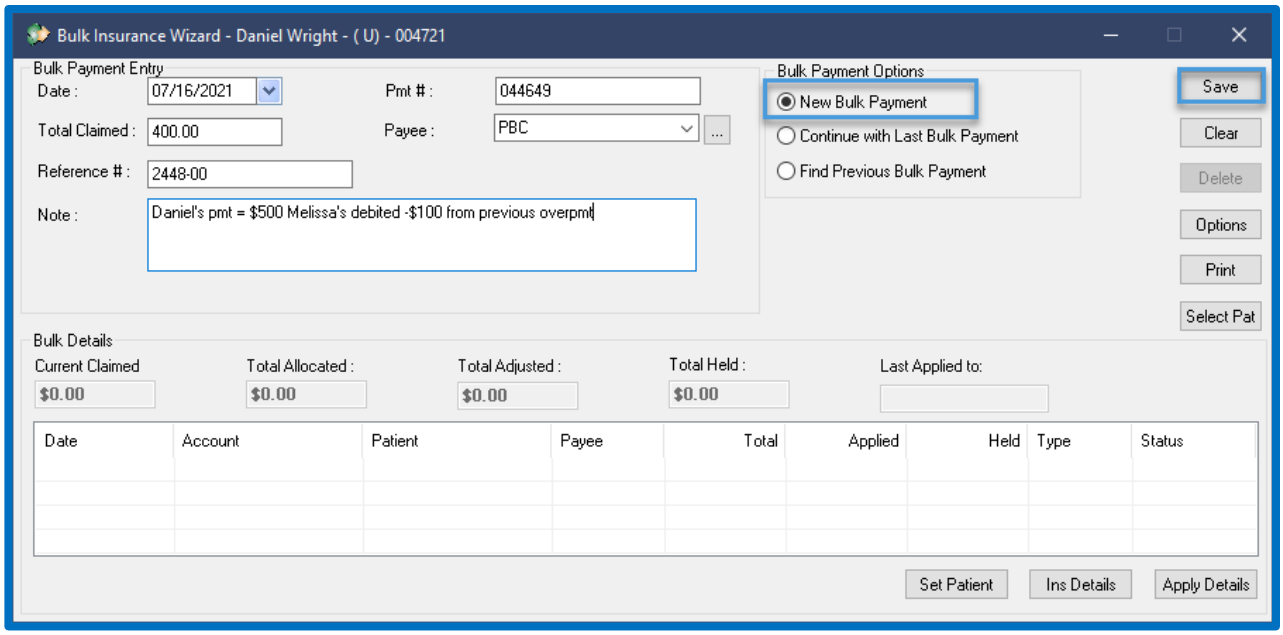
- Produce Contract forms for patients to sign.
- Predet Forms to send a new plan in for insurance estimates (some clinics prefer to build the plan first, then send the predet form. This auto-fills the form for you. Just be sure to close the plan after if not needed).
- Reconcile, will show fees billed and payments made.
- Remaining Fees, as discussed above, will allow you to swap producers for the plan.
- Process Fees will help you apply outstanding ortho charges.
- Finally, Insurance will give you a quick glance at the patient's policies.

Bulk Insurance Wizard

Online article: Bulk Insurance Wizard - Power Practice
Online video: Video: 5.0 Transaction Enhancements

Added in a previous release, the Bulk Insurance Wizard has seen some great improvements since release. The aim is to simplify and streamline Bulk Insurance Payments, making them easier than ever before. The linked article and video above discuss the module in detail and guide you through its use. This section will simply highlight the key features and enhancements added in this year's release.

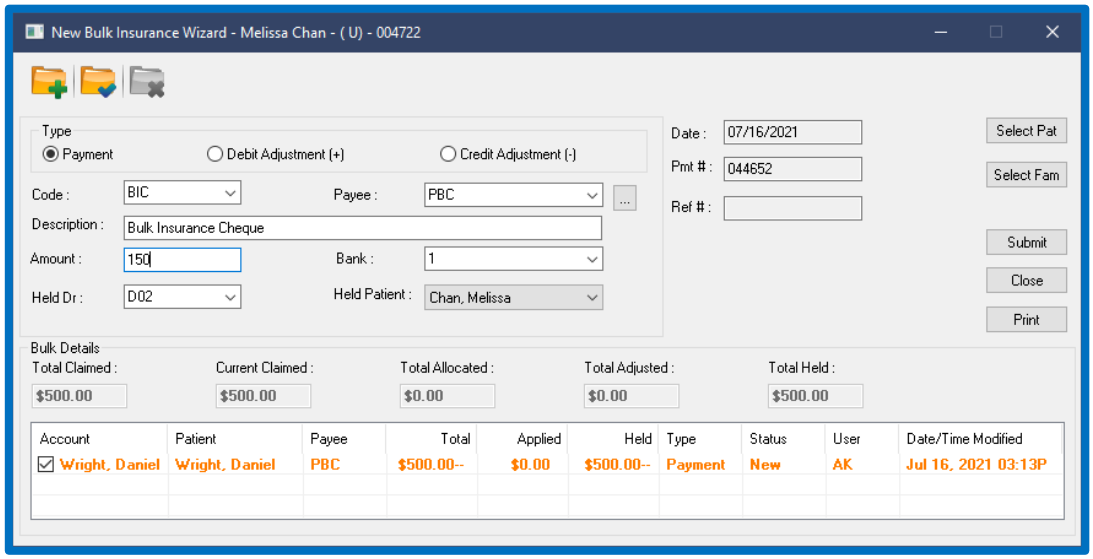
Accessible via the "Wizard" button on the Bulk Ins. tab of the Transactions module, the popup window presented offers a few options: you can start a New payment, Continue with the Last Bulk Payment, or Find Previous Bulk Payments. You should enter this module with the first recipient's file active.



New Bulk Payment:

- The process of entering a new payment begins by detailing the Total Claimed amount, the Payee, as well as an optional Reference number and Notes area.
- You can use these fields to keep things organized, allowing you to reference the original entry notes in the future. This is a great way to communicate details to future reviewers of the payment.
- The next step is selecting the Save button in the top right corner to begin logging the payments on the cheque.
- A new window interface will appear.

We will eventually return to this window once all payments are logged and ready for allocation. At that point we will get the chance to review the Bulk Details currently listed at $0.00 all the way across.

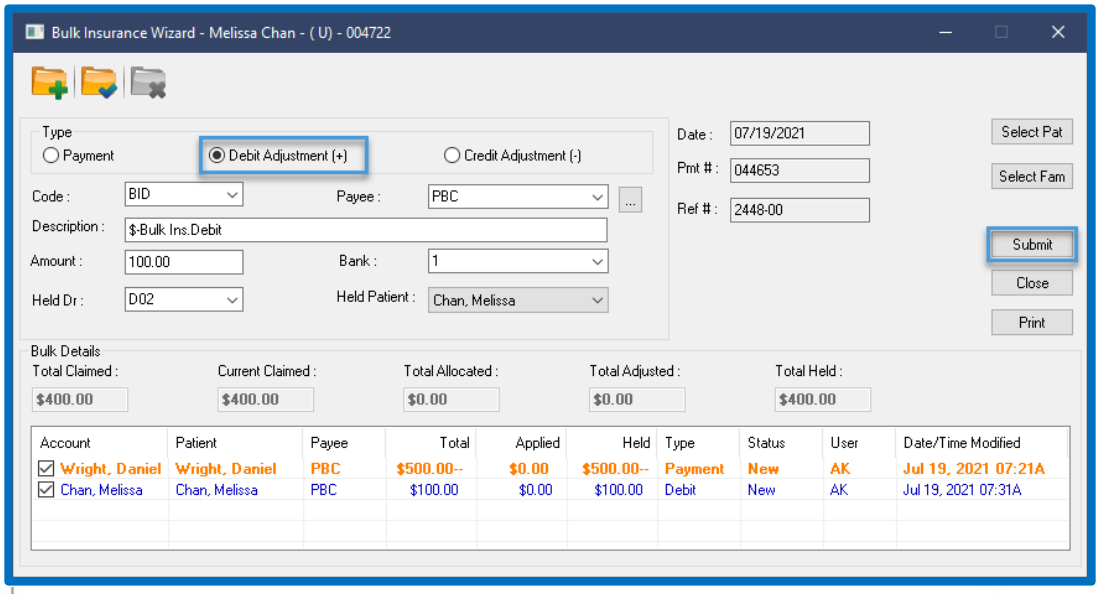


Payments:

- You can log the payments one-by-one in the new popup window.
- Enter the amounts listed next to the patient's name as you see them on the cheque.
- The three supported transaction types here are Payments, Debit Adjustments and Credit Adjustments. This will allow you to easily adapt to whatever entry is listed on the cheque.
- The Held Dr. and Held Patient drop-down menus are required fields. Typically, offices will use the practice owner as the Held Dr.
- Once you have filled in all the fields, select the Save folder icon, the blue tick mark in the top left. You should *not* use the Submit button on the right.
- This logs the payment information for further interaction later and presents the patient select window so you can proceed to the next payment.

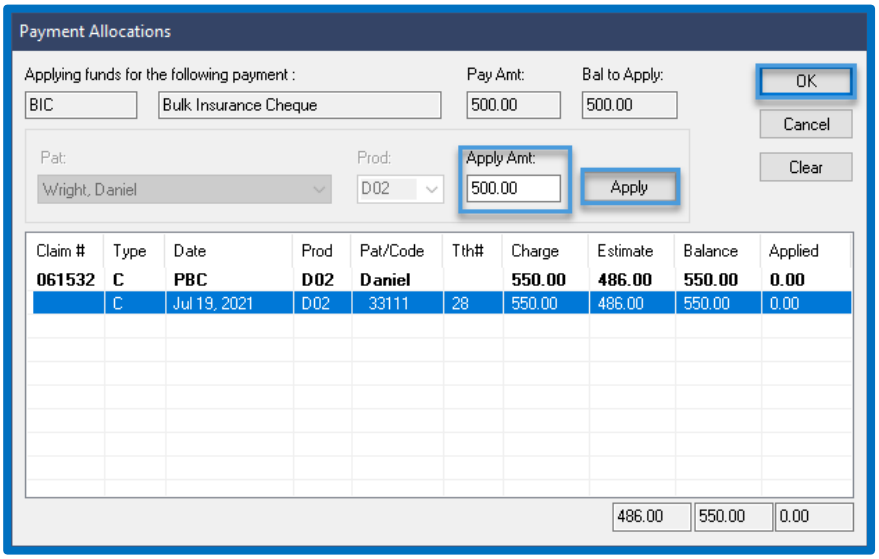
Adjustments:

- The Debit and Credit Adjustment options will behave as they normally would in the Adjustments tab.
- Once you have filled in the details, use the blue check mark folder to save the adjustment.

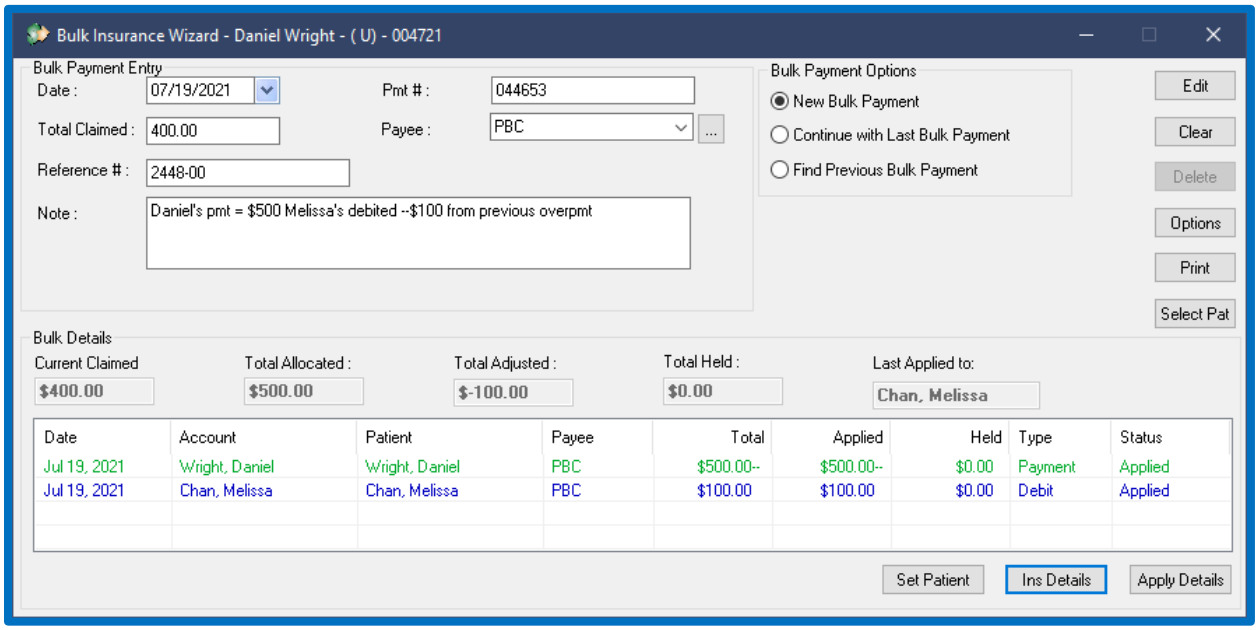


Allocation:

- Having listed all the payments and adjustments, you may proceed to the allocation process.
- Use the Submit button to “complete” the process and begin the allocations.
- This will immediately trigger the allocation window for the first listing on your Bulk entry.
- Allocate the payment or adjustment as normal. Select your treatments and enter the amounts, then apply.



When you are finished, the program window will return to the prior submission window. You can simply close that window to return to the initial starting page where we can review our cheque entry for accuracy.



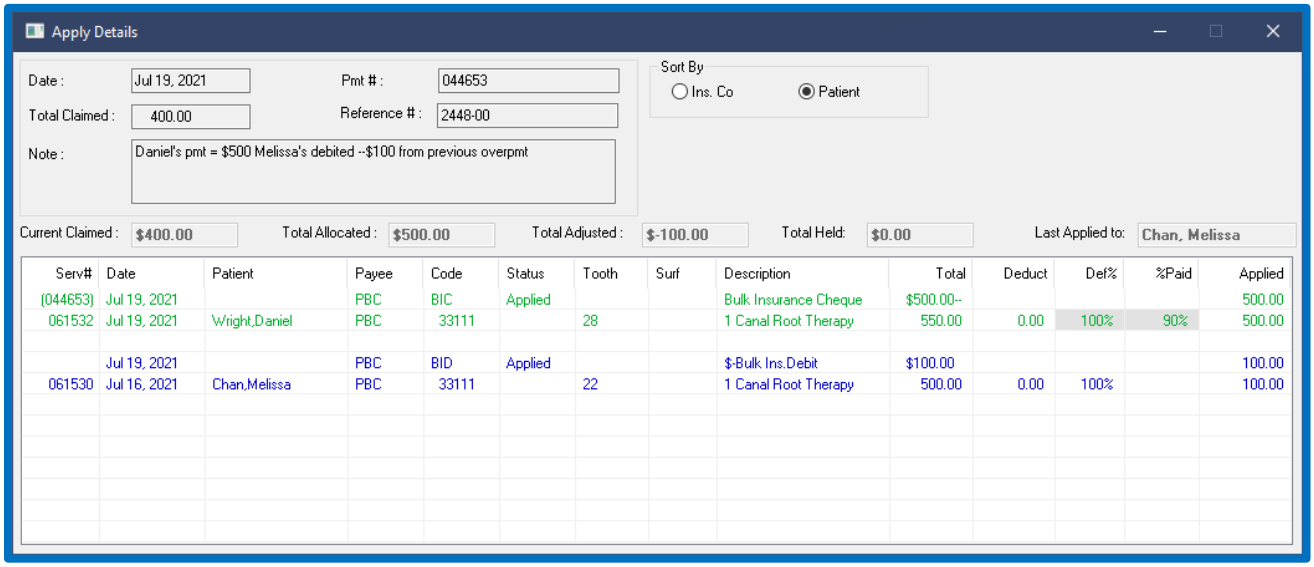
The main window of the Wizard is the final checkpoint in our cheque entry. It gives you a chance to review the Current Claimed, Total Allocated, Total Adjusted, Total Held, and finally, Last Applied to.

This should make it much easier to quickly review your work and make final adjustments. You can use the Edit button to return to the entries window. The print option is a great way to save a snapshot record of the entry as well.

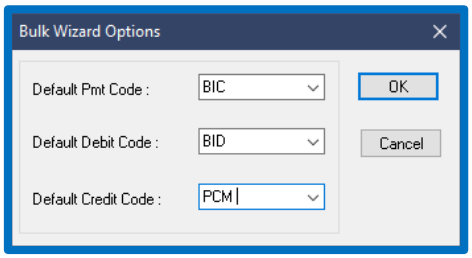
We will briefly discuss the remaining key points of this module next.

Apply Details:

The Apply Details window provides a greatly detailed allocation summary of your cheque entries.



You can track how each payment or adjustment was applied. The treatment lines that received the allocation will be listed under each. In this simple example, the payment and adjustment each only had one allocation target. You will often see payments distributed over multiple treatment lines, however.

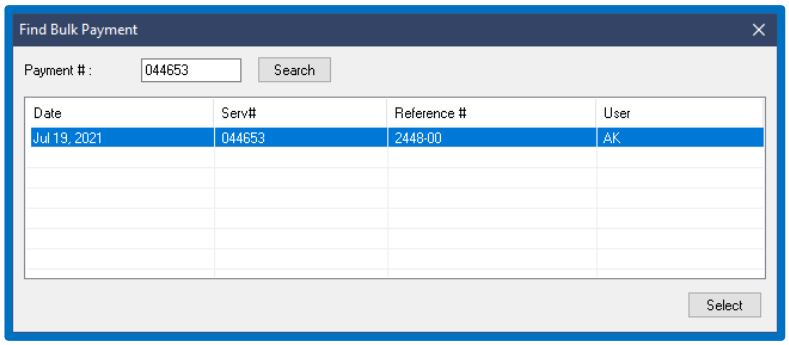


Options:

The Options button allows you to set default codes for the three main functions. It is highly recommended you set these to your preference.

Continue & Find Bulk Payment:

Selecting the Continue with Last Bulk Payment bullet will immediately pick up the last Bulk entry worked on for this machine. This is nice and straightforward when only one person is logging the payments.



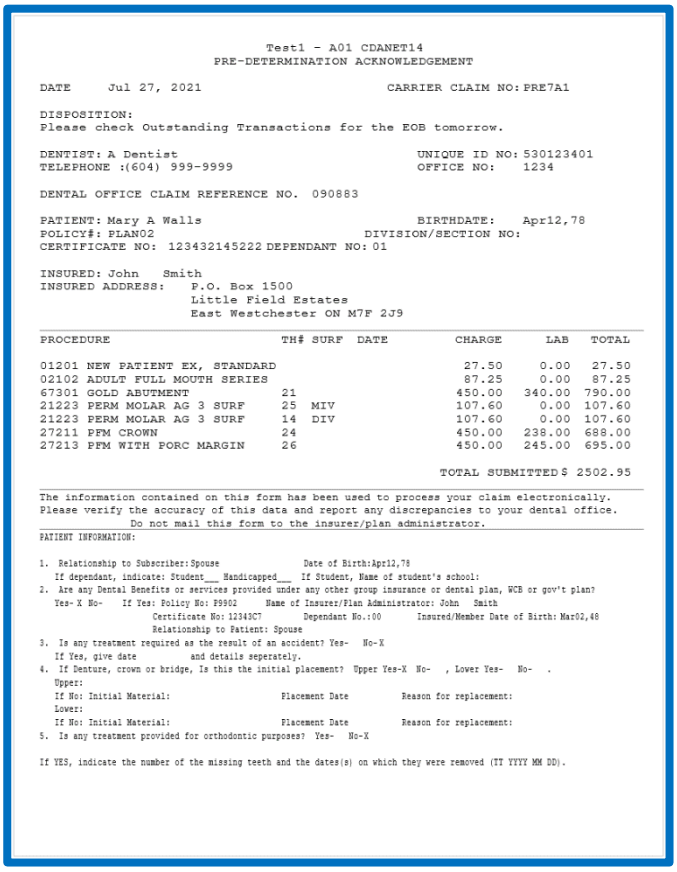
If the Continue bullet does not pickup the right entry, you can use the Find option to pick it up manually.

You will need the Payment number involved and the easiest way to find that is to visit the Ins pmt tab of the last recipient you entered a payment for on that cheque. The payment number will be listed on that tab and used to locate your old cheque.

Multipage Predetermination

Online article: [5.1 - Enabling Multipage Predeterminations - Power Practice]

Submissions for pre-approval have previously been limited to seven items per claim. You can now submit your entire treatment plan at once instead of manually breaking it up into separate seven item claims, so long as the insurance company supports the feature.



Test1 - A01 CDANET14
PRE-DETERMINATION ACKNOWLEDGEMENT

DATE Jul 27, 2021 CARRIER CLAIM NO: PRE7A1

DISPOSITION:
Please check Outstanding Transactions for the EOB tomorrow.

DENTIST: A Dentist UNIQUE ID NO: 530123401
TELEPHONE :(604) 999-9999 OFFICE NO: 1234

DENTAL OFFICE CLAIM REFERENCE NO. 090883

PATIENT: Mary A Walls BIRTHDATE: Apr12,78
POLICY#: PLAN02 DIVISION/SECTION NO:
CERTIFICATE NO: 123432145222 DEPENDANT NO: 01

INSURED: John Smith
INSURED ADDRESS: P.O. Box 1500
Little Field Estates
East Westchester ON M7F 2J9

PROCEDURE	TH#	SURF	DATE	CHARGE	LAB	TOTAL
01201 NEW PATIENT EX, STANDARD				27.50	0.00	27.50
02102 ADULT FULL MOUTH SERIES				87.25	0.00	87.25
67301 GOLD ABUTMENT	21			450.00	340.00	790.00
21223 PERM MOLAR AG 3 SURF	25	MIV		107.60	0.00	107.60
21223 PERM MOLAR AG 3 SURF	14	DIV		107.60	0.00	107.60
27211 PFM CROWN	24			450.00	238.00	688.00
27213 PFM WITH PORC MARGIN	26			450.00	245.00	695.00

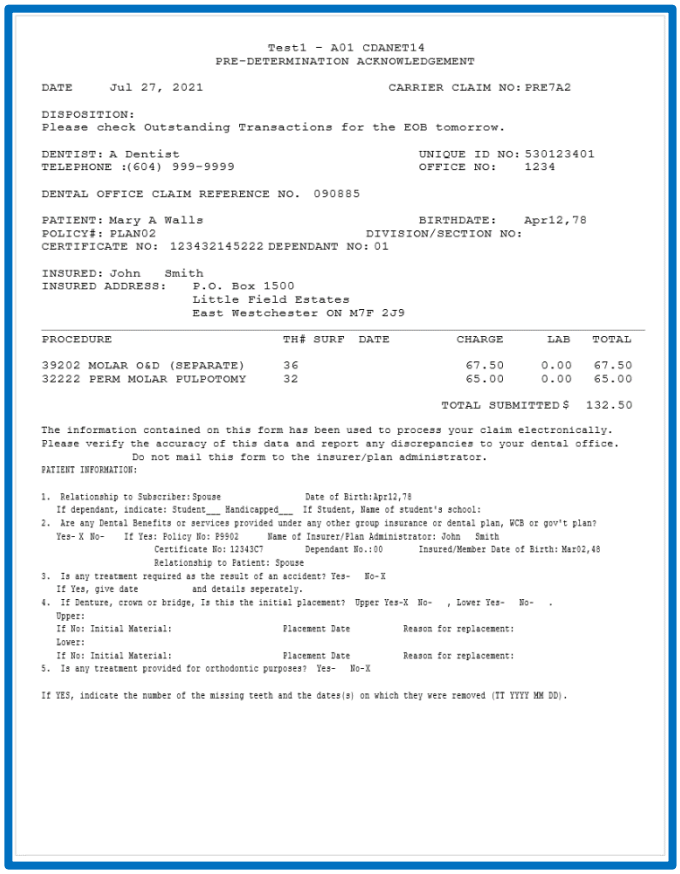
TOTAL SUBMITTED $ 2502.95

The information contained on this form has been used to process your claim electronically.
Please verify the accuracy of this data and report any discrepancies to your dental office.
Do not mail this form to the insurer/plan administrator.

PATIENT INFORMATION:

1. Relationship to Subscriber: Spouse Date of Birth: Apr12,78
If dependant, indicate: Student___ Handicapped___ If Student, Name of student's school:
2. Are any Dental Benefits or services provided under any other group insurance or dental plan, WCB or gov't plan?
Yes- X No- If Yes: Policy No: P9902 Name of Insurer/Plan Administrator: John Smith
Certificate No: 12343C7 Dependant No.: 00 Insured/Member Date of Birth: Mar02,48
Relationship to Patient: Spouse
3. Is any treatment required as the result of an accident? Yes- No-X
If Yes, give date and details seperately.
4. If Denture, crown or bridge, Is this the initial placement? Upper Yes-X No- , Lower Yes- No- .
Upper:
If No: Initial Material: Placement Date Reason for replacement:
Lower:
If No: Initial Material: Placement Date Reason for replacement:
5. Is any treatment provided for orthodontic purposes? Yes- No-X

If YES, indicate the number of the missing teeth and the dates(s) on which they were removed (TT YYYY MM DD).



Test1 - A01 CDANET14
PRE-DETERMINATION ACKNOWLEDGEMENT

DATE Jul 27, 2021 CARRIER CLAIM NO: PRE7A2

DISPOSITION:
Please check Outstanding Transactions for the EOB tomorrow.

DENTIST: A Dentist UNIQUE ID NO: 530123401
TELEPHONE :(604) 999-9999 OFFICE NO: 1234

DENTAL OFFICE CLAIM REFERENCE NO. 090885

PATIENT: Mary A Walls BIRTHDATE: Apr12,78
POLICY#: PLAN02 DIVISION/SECTION NO:
CERTIFICATE NO: 123432145222 DEPENDANT NO: 01

INSURED: John Smith
INSURED ADDRESS: P.O. Box 1500
Little Field Estates
East Westchester ON M7F 2J9

PROCEDURE	TH#	SURF	DATE	CHARGE	LAB	TOTAL
39202 MOLAR O&D (SEPARATE)	36			67.50	0.00	67.50
32222 PERM MOLAR PULPOTOMY	32			65.00	0.00	65.00

TOTAL SUBMITTED $ 132.50

The information contained on this form has been used to process your claim electronically.
Please verify the accuracy of this data and report any discrepancies to your dental office.
Do not mail this form to the insurer/plan administrator.

PATIENT INFORMATION:

1. Relationship to Subscriber: Spouse Date of Birth: Apr12,78
If dependant, indicate: Student___ Handicapped___ If Student, Name of student's school:
2. Are any Dental Benefits or services provided under any other group insurance or dental plan, WCB or gov't plan?
Yes- X No- If Yes: Policy No: P9902 Name of Insurer/Plan Administrator: John Smith
Certificate No: 12343C7 Dependant No.: 00 Insured/Member Date of Birth: Mar02,48
Relationship to Patient: Spouse
3. Is any treatment required as the result of an accident? Yes- No-X
If Yes, give date and details seperately.
4. If Denture, crown or bridge, Is this the initial placement? Upper Yes-X No- , Lower Yes- No- .
Upper:
If No: Initial Material: Placement Date Reason for replacement:
Lower:
If No: Initial Material: Placement Date Reason for replacement:
5. Is any treatment provided for orthodontic purposes? Yes- No-X

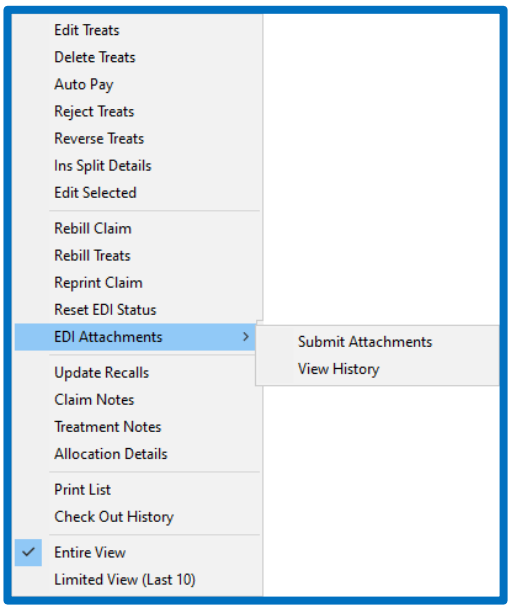
If YES, indicate the number of the missing teeth and the dates(s) on which they were removed (TT YYYY MM DD).

This feature will need to be enabled first, for the carriers that support it.
Follow the linked article above to get the details on how to do so.

In terms of compatibility and use cases, this feature follows a simple set of rules. If the patient only has one plan and that carrier allows multi-page predeterminations, the program will not stop you after 7 items. If primary and secondary can both handle multipage submissions, you will also be able to submit more than 7 items at once. However, new claims with the Multipage unticked will behave as normal and limits you to 7. If only 1 of the 2 carriers accepts multi-page predeterminations, you will still be limited to 7 items per claim, regardless of whether the carriers Coordinate Benefits or not.

Insurance Attachments

Online article: [5.1 - Insurance Attachments - Power Practice]

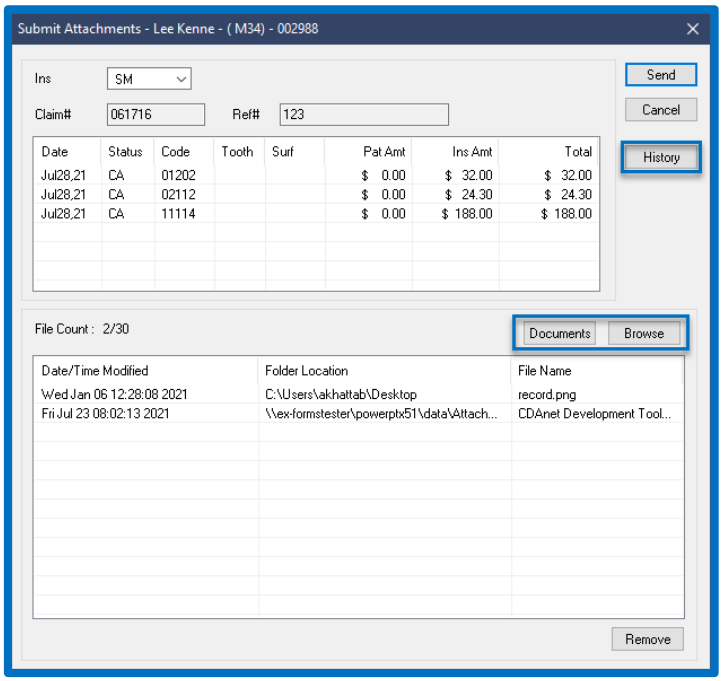


Certain carriers now allow the submission of supporting documents electronically. The Insurance companies that do and do not support the function will vary, so check in with our Support team for guidance.

The guide linked above will provide a detailed walkthrough of the feature, this section will briefly touch on the key components.

Usage & Requirements:

- First and foremost, your claim must be submitted electronically and have a valid, positive, EDI response like E or A (Explanation of Benefits and Acknowledged, respectively).
- If you right click a claim of this type, you will find a new menu option, EDI Attachments, displayed in the image above.
- This will present the Attachments window, shown on the right.
- You can quickly link any of the items in the patient's Document Manager module via the Document button.
- The Browse button allows you to search your computer for the files you wish to attach.
- When you've gathered what you need, you can use the Submit button to send all the files listed to the carrier.
-



Transaction Module Minor Changes:

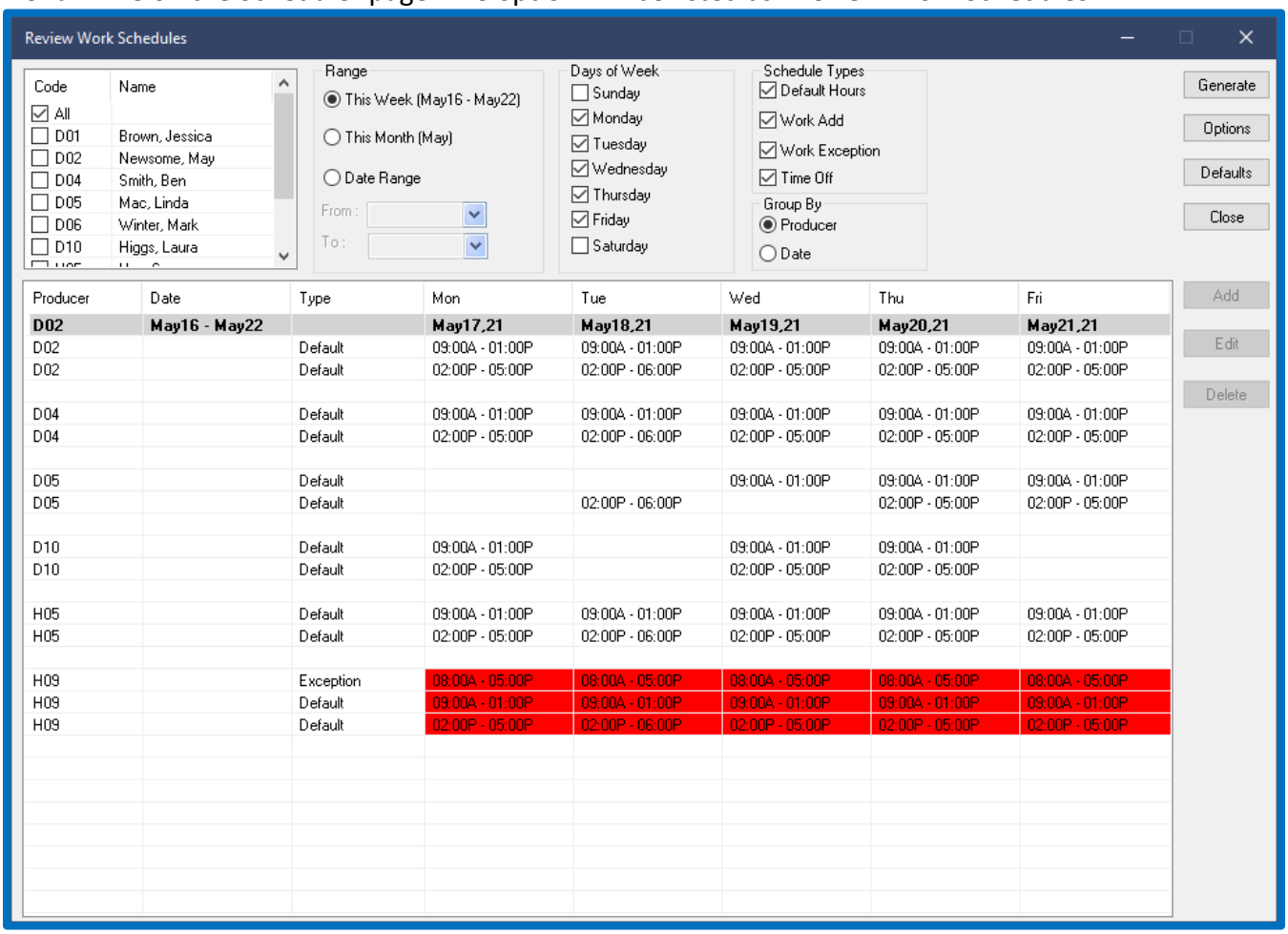
- Addressed issues related to reversing Coordination of Benefit claims.
- RAMQ/SYRA updated to utilize the latest XSD.
- Ortho Predetermination Forms can now be printed in French.
- Standard Dental Claim forms revised – S.I.N. no longer collected.
- Emailed statements will behave as expected regardless of Digital Printing settings selected.
- Future Appointments will now list in the proper chronological order on printed receipts.

Scheduler/ Appointment Book Module

Review Work Schedules Report

Online article: 5.1 - Review Work Schedules - Power Practice

Using this report, you can review any producer's default hours, as well as their custom Work Schedule entries such as, Work Add, Exceptions, and Time Off. You can access this module via the right click menu while on the Scheduler page. The option will be listed as "Review Work Schedules".



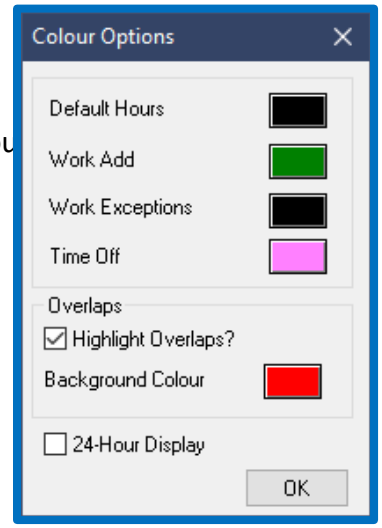
From the image above we can see how the report will typically behave. We find producer schedules listed for the timeline provided. I sorted them by Producer to keep things tidy. This at-a-glance view format makes quickly reviewing producer hours much simpler.

The last producer, H09, is showing red line entries. This is due to an Option enabled that highlights overlapping hours. This feature will be immensely helpful when trying to track down why a producer's scheduler columns are not responding to Schedule updates as expected; odds are there is a conflict in Working days/Exceptions and Time Off entries. Putting these principles into action, if you are trying to

“open” a producer’s column for a specific date and cannot seem to do so, running this report may elucidate why, pointing you to the conflict.

Report Selections:

- You can choose which producers you wish to review schedules for.
- The Date Range and Days of Week options helps limit your search window to keep your results under control.
- Schedule Types can be restricted to any of the options shown. If you are unsure what you are looking for, include all types.
- Results can be grouped by Producers or Dates.

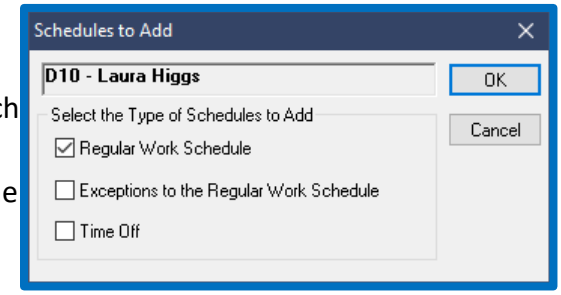


Options:

- The Options button offers a chance to colour code your results.
- Each type can be given its own colour to make reviewing results easier.
- The Highlight Overlaps? Option is highly recommended. It will flag any entries that crossover one another.
- 24-Hour Display is also on offer if you prefer.

Add/Edit/Delete:

- You can also modify work schedules from this report using the buttons on the right side.
- Choosing Add will present a selection window in which you designate what kind of addition this will be, Workdays, Exceptions or Time Off. This is shown in the image on the bottom left.

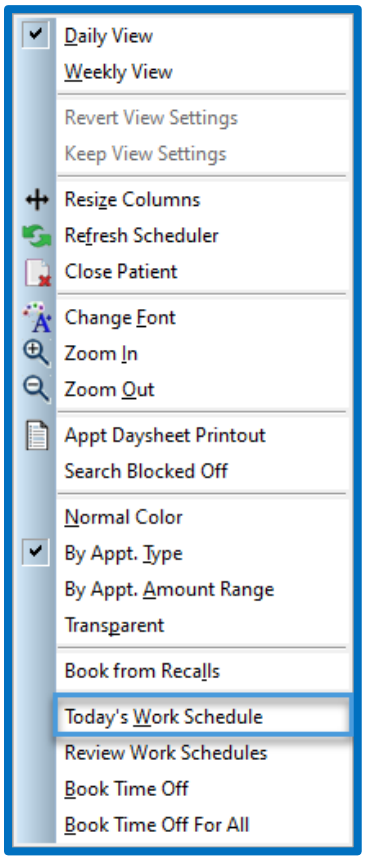


- The Edit button presents the producer’s standard hours for modification. This is shown below, the big window with multiple separated areas.
- The Delete button will not appear available until we highlight a line in the report which is not related to the default hours. The line must be a Time Off, Workday or Exception type. These can be deleted from the system entirely using this button.

The producer hours are set system wide.
Changes made within this module will be reflected on all other stations immediately. Be mindful of changes made as there is no easy way to restore or revert to old hours.

Today's Work Schedules

Online article: [5.1 - Today's Work Schedule - Power Practice]



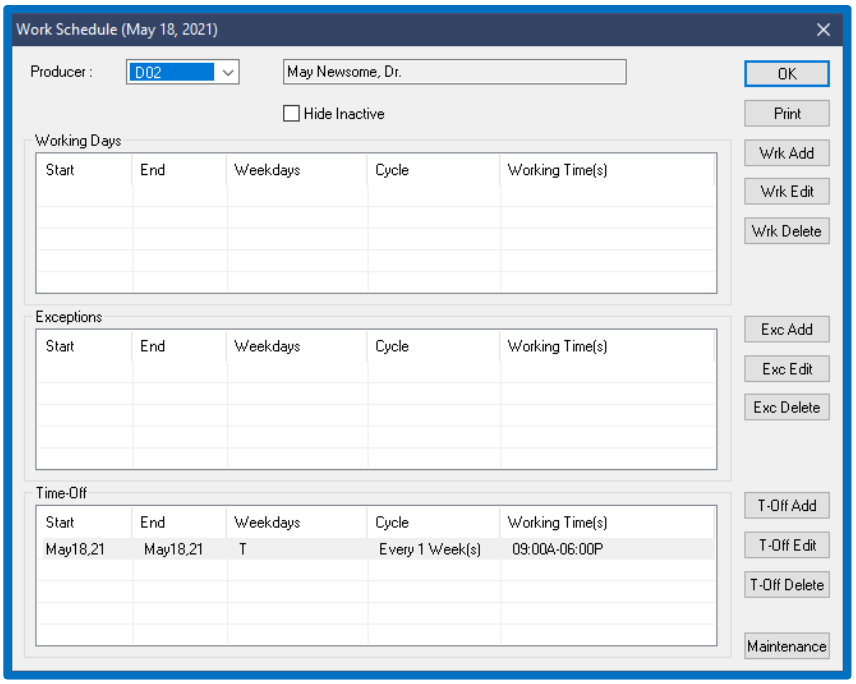
Continuing the theme of simplified Schedule management, the new update brings along a highly requested feature, the ability to immediately identify which work schedule entries affect the given date and column.

To utilize this feature, follow the steps below:

1. Set the Scheduler to the date you wish to review hours for.
2. Right click within the Scheduler columns.
3. Select Today's Work Schedules from the list.
4. Set your producer in the dropdown at the top left first.
5. The records shown will somehow affect the date. These can be single entries or ranged entries spanning a longer period.

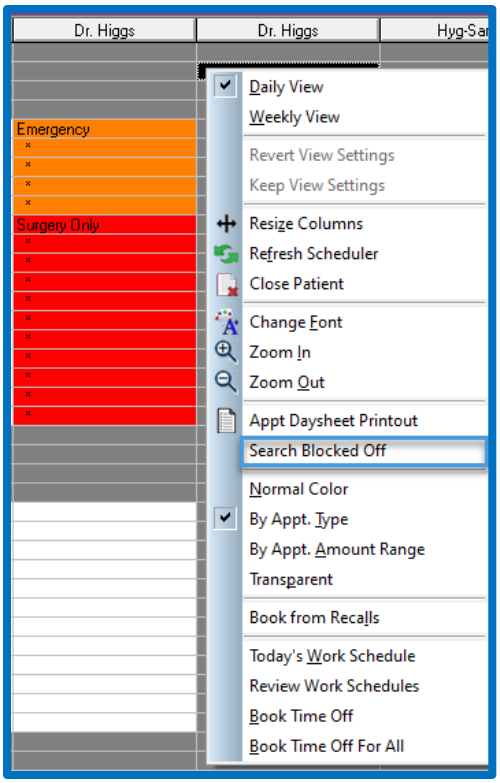
The image below demonstrates just how helpful this new utility can be.

Instead of sifting through dozens of work schedule entries for this producer, we can narrow down all schedule record entries to only those which affect the given date, shown in the title bar within brackets. You can then easily modify or delete the conflict entries, enabling you to successfully change the producer column availability.



Search Blocked Off Time

Online article: [5.1 - Search Blocked Off - Power Practice]



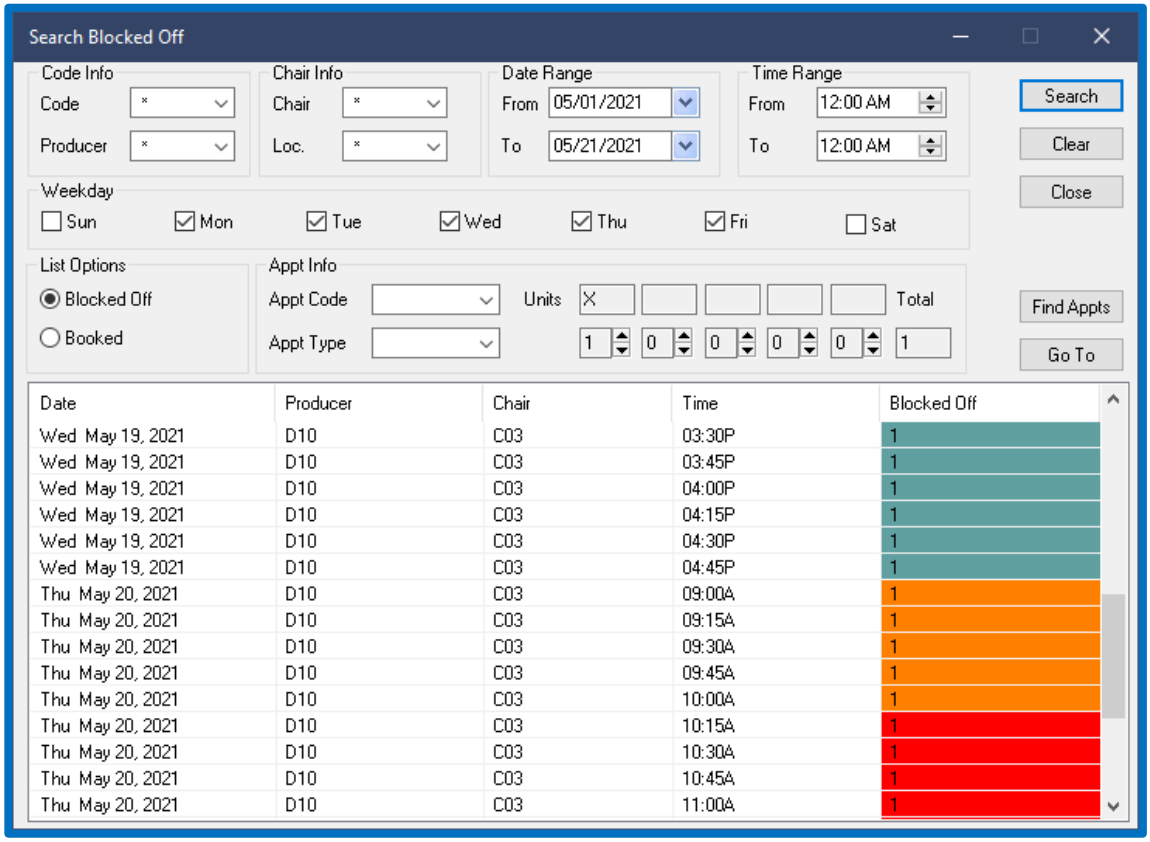
For offices that utilize the "Perfect Day" booking practice, the newly added Search Blocked Off report will give you some extra tools to manage your schedule with.

This report requires the use of Time Off types, a feature added in version 4.9 that allows you to colour-code your time off entries and designate them as a certain type. A quick example of this concept is shown on the right. The report can be accessed via the right click menu on the Scheduler, as shown in the image.

Most The newly added report has two search methods:

Blocked Off:

- This search method is shown in the image below.
- It presents all units of "blocked off" time in the given search parameters.
- It will not present any time off units that are not using a time off type.
- This search method is the opposite of its alternative, Booked, which presents Blocked Off time slots that have also been booked over with an appointment.



Booked:

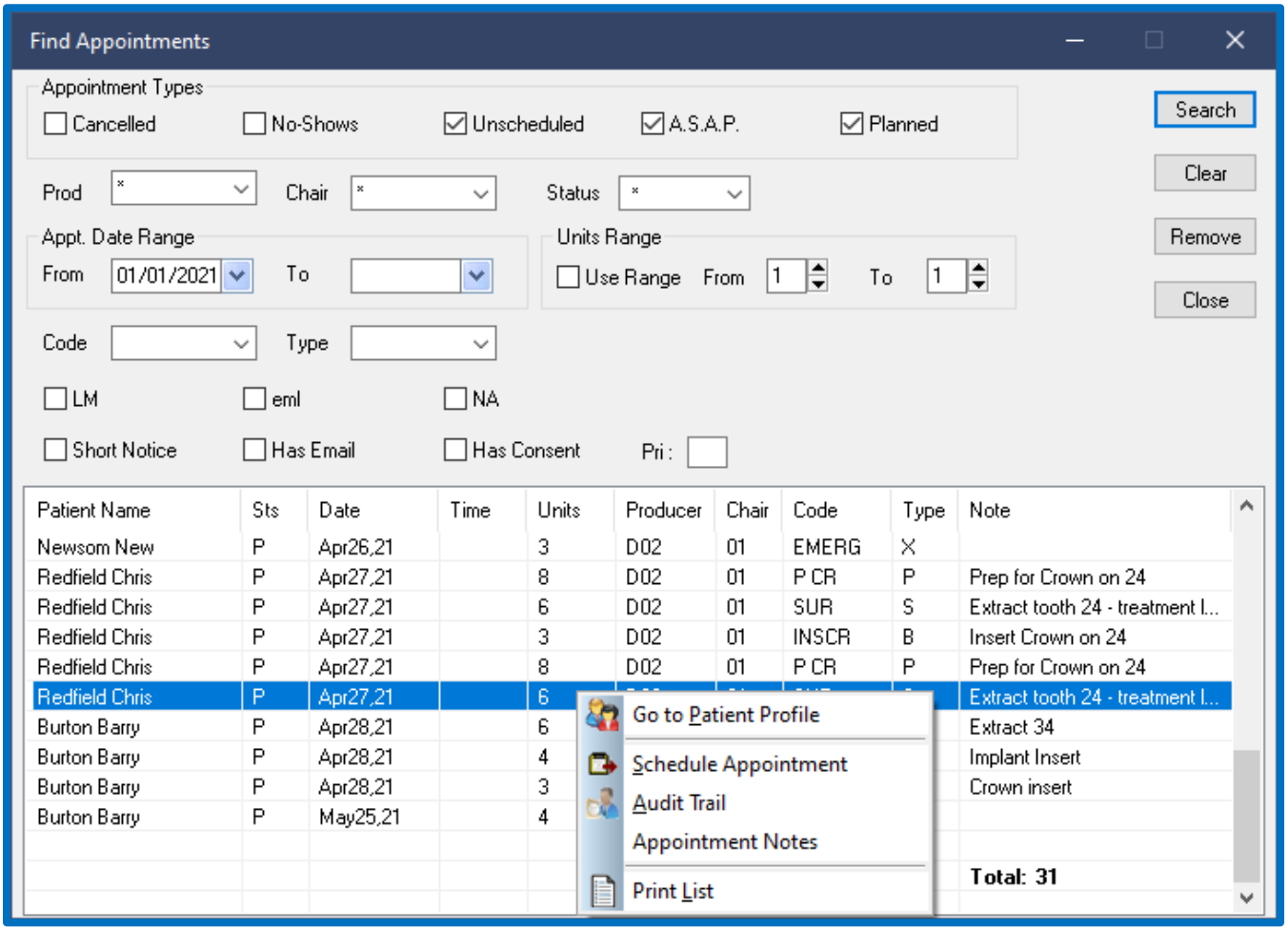
- This option will present any units wherein a Time Off type is in use, and there is also an appointment booking overlapping it.
- This is meant to help you find bookings made so you can more easily navigate your Perfect Day schedule.
- It is important to note that this search method will not find any results which belong on the alternative, Blocked Off, search method. These 2 are mutually exclusive.

Finding Appointments

Online article: [5.1 - Find Appts - Power Practice]

The Search Blocked Off report also houses an option to help you find appointments with which to fill-in gaps in your schedule. Given we wish to schedule an appointment within a specific time slot, we should set the Search Blocked Off report options to find "Blocked Off" slots, instead of "Booked" ones. This will help us find available spaces where we can book a new appointment.

So long as your search has returned some results, you can highlight any line in the list and select Find Appts to begin. The new report window shown below appears.



Appointment Types:

- You can designate which appointment types to include or exclude. I chose to leave out Cancelled and No-Shows, but you can set those however you wish.
- Similarly, Producer, Chair, Status and Dates can be set as shown in the image to maximize results.

Range options:

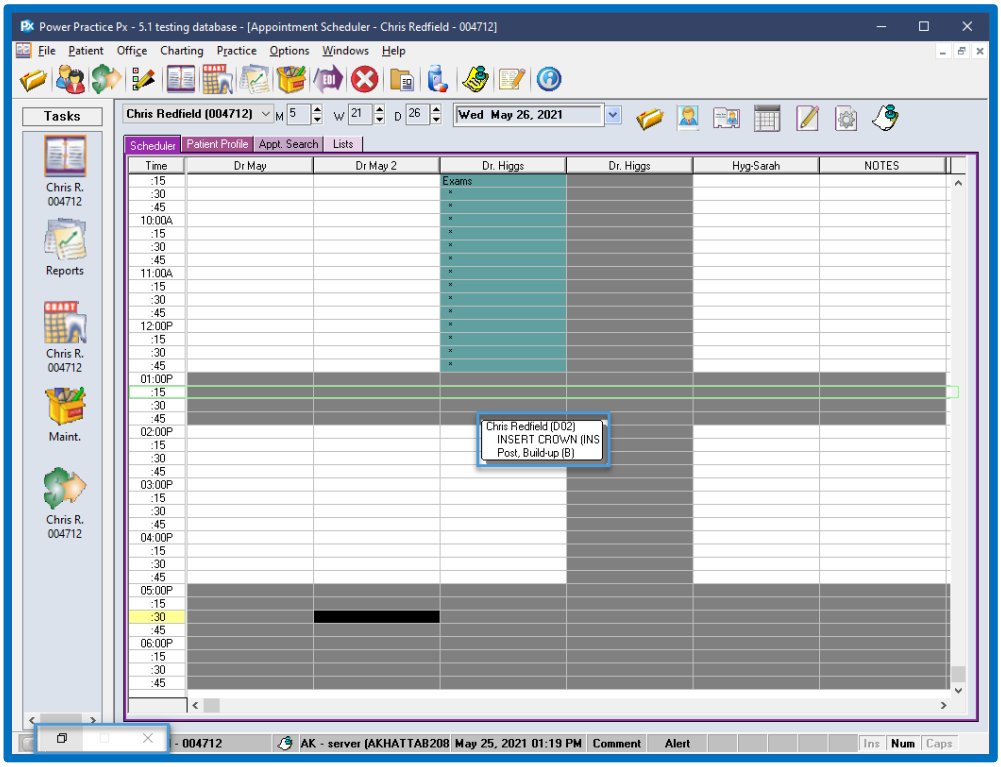
- Set a Date range to search for appointments within or leave the end date blank if you wish.
- The Unit Range option is ideal if you wish to find an appointment of an exact unit size. Leaving this blank will maximize results.
- Setting this field manually will restrict your results to only show appointments that fit the unit range set.

Code, Type, and tick boxes:

- Leaving the code and type blank is recommended, unless you are looking for a very specific appointment to book in the time slot.
- The tick boxes available will also filter your results so be sure to only include those you intended to.

Right Click Options:

- You can link directly to the Patient Profile to review old appointment history.
- Schedule will allow you to book the appointment immediately. Just be sure to minimize the Report windows so you can see the floating appointment box and position it more easily.
- The image below shows what you can expect. The floating appointment box in the middle of the screen can be double left clicked into an available unit slot.
- The bottom left corner shows the minimized report which you can restore using the squares icon.



Hide Inactive Producers on Schedule Setup

Online article: [5.1 - Hide Inactive Producers in Setup & Work Schedule Windows - Power Practice]

Even when producers are inactivated, there are still some areas of the Scheduler which lists them. This new option will allow you to hide such producers from those lists.

- The first option is found in the Producers window under the Paper and Pencil Settings area.
- The second option is found within the Work Schedules window.

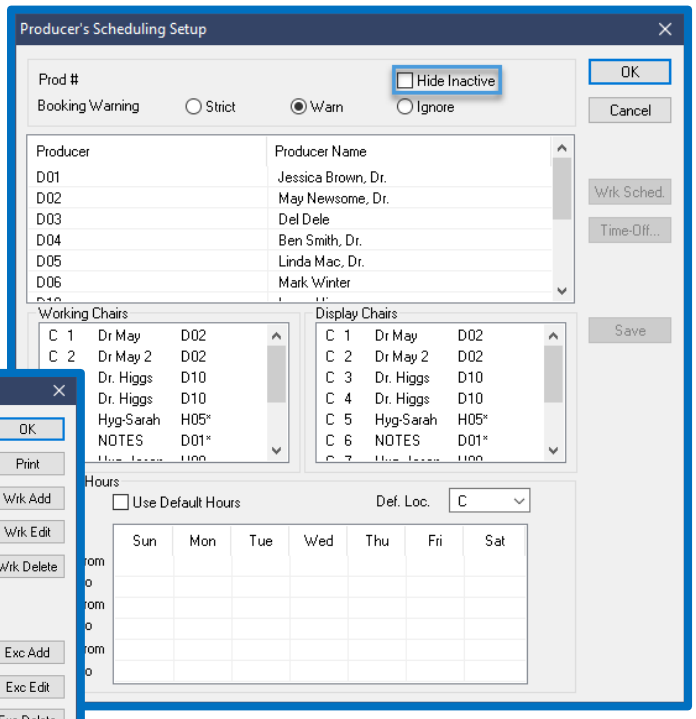
In both cases, you will need to enable the tick box each time you visit the window.

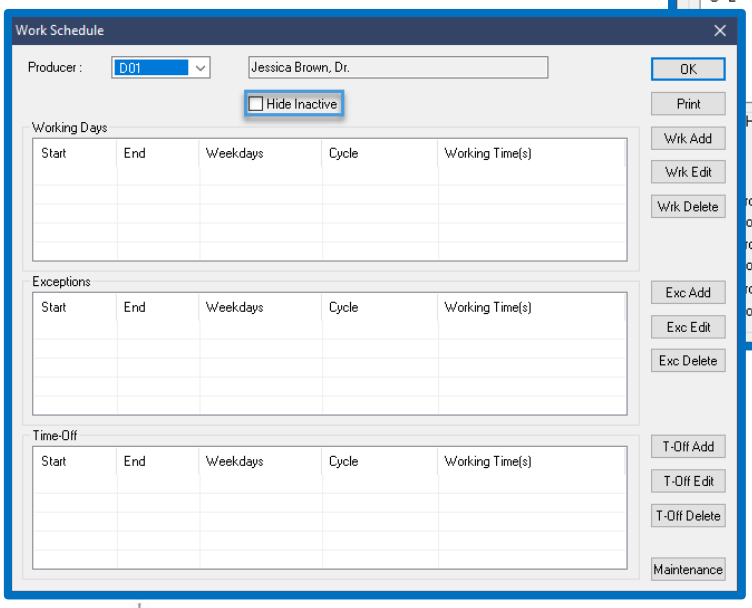
Note that this feature will only hide the producers in the window the setting was enabled for. This means your inactive producers will still populate the Maintenance Manager's Producer Codes area.

They will also still be listed on any reports that reference their A/R. This will not exclude the producers from reports which show "A/R for non-working Producers".

Inactivated Producers cannot be billed for new A/R, nor can they have an active chair or appointments booked under their name. Inactivating those producers who have left your practice may cut down on mistaken producer selections when posting treatments.

If you producer is not yet inactivated, call our Support team for the inactivation guide/instructions.



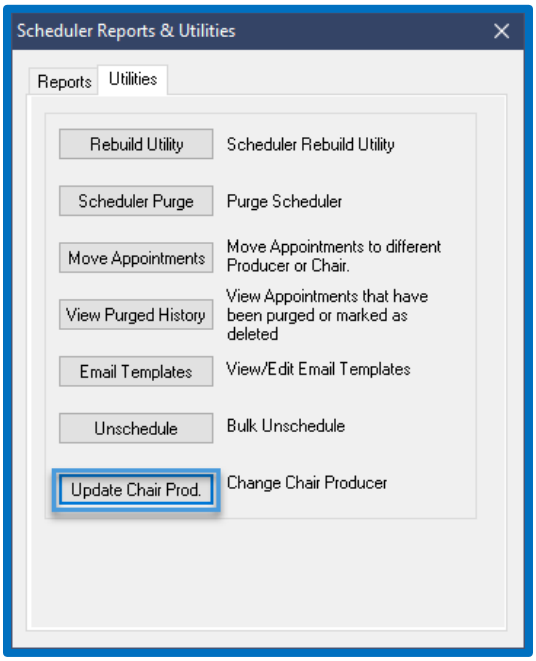


Swap Producer Chairs Utility

Online article: [5.1 Swapping Producer Chairs - Power Practice]

In the past, replacing a Producer on the Scheduler has been a complicated and lengthy task. This new utility will dramatically simplify the process of swapping producer chairs on your schedule.

Within the Scheduler module, look to the top right corner to find the Utilities icon. 



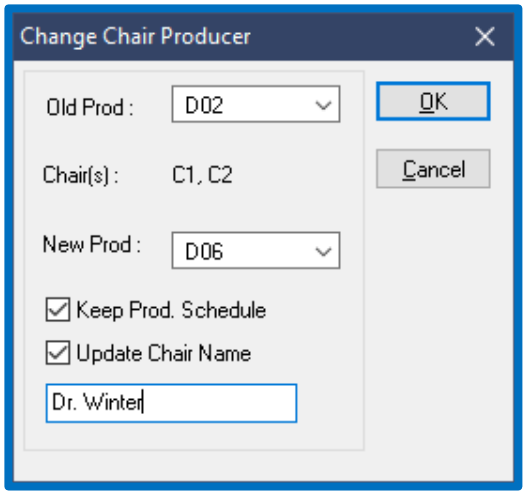
Switch to the utilities tab and select Update Chair Prod. from the list.

You will need to use the Daily Password to access this function. You can call our Support team as this password updates daily.

Finally, you are given an option to select the Old Producer, and the New one.

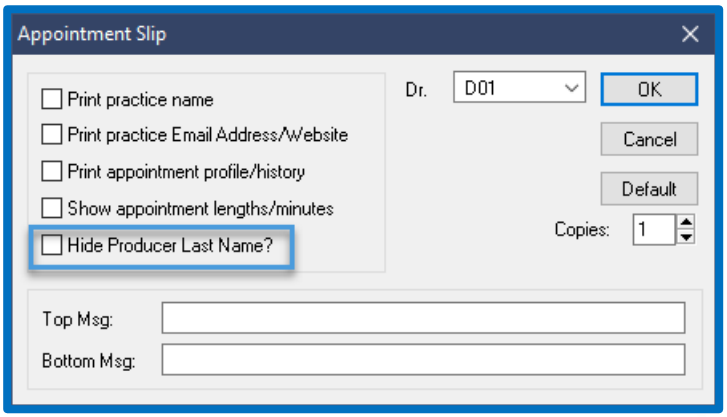
Simply set the dropdowns appropriately and proceed to the tick boxes.

You can keep the same Producer Schedule if they will be taking over the same hours as the previous producer. You can also choose to keep or Update Chair Name.



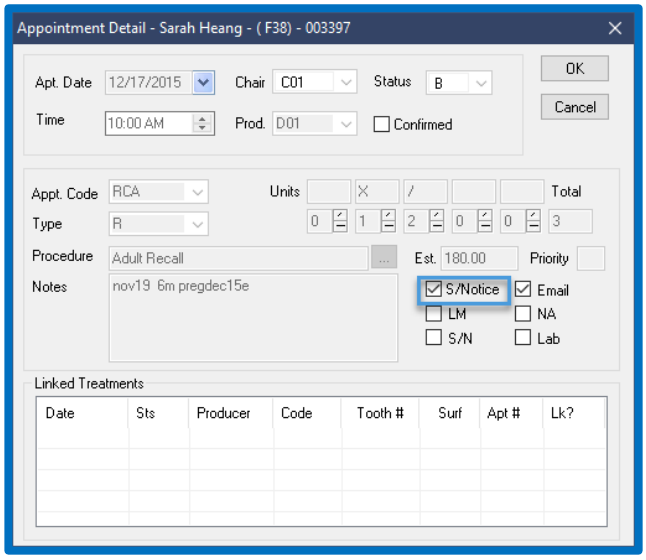
Upon confirming your selections and allowing the application some time to process the change you will find your Scheduler refreshes to update all the relevant information.

Appointments in the relevant columns will have had their producer changed automatically. If your chose to keep the scheduled hours, those too will have migrated under this producer's ID number.



Disabling Short Notice for Past Appointments

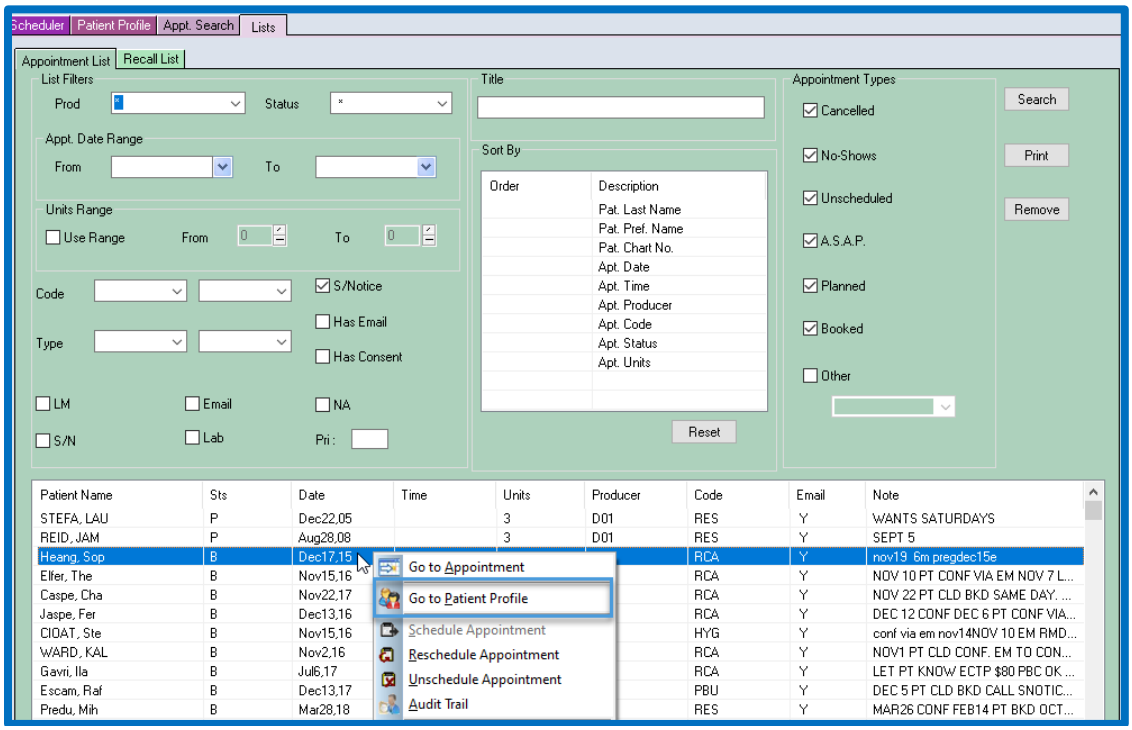
Patients who had the Short Notice flag enabled for their appointments can now have the setting removed even if the appointment is from a past date.



- Visit the Scheduler and activate your patient file.
- Select the Patient Profile tab on the Scheduler.
- Edit or double left click the appointment you wish to remove the Short Notice status from.
- Remove the checkmark from the S/Notice box shown above and press Ok.

This should help you keep the Short Notice lists accurate and effective.

You may prefer to reach the steps above by running the Appointment List report, right clicking your patient's name, and visiting the Patient Profile directly.



Please note, this is the only method by which you can disable the S/Notice tick box for now. You cannot, for example, edit the appointment details via double clicking an appointment box on the main Scheduler tab. You must use the Patient Profile area discussed above.

Scheduler Module Minor Changes:

- You can now use 6-week cycles when adding Working Days, Exceptions or Time off.
- Right clicking a patient's appointment offers a new option: List Family Appointments.
- Appointment Reminders can be set to hide Producer last names.
- You can now choose to hide Appointment Procedure, type, or both in your Scheduler view.

General Program Improvements

- The Info Manager module can now report on Proposals, added as a new category.
- The Referral Manager can now print Labels directly from the module using the familiar Label icon.
- You can now also right click a patient's name in the Referral Manager and set them as the active patient. This will help when navigating to patient files while reviewing various referral sources.
- Custom Reports can now use the Mail Merge option, just like the Info Manager can.
- Treatment Proposal searches can now be filtered by code.
- You can now access Patient Referrals straight from the Odontogram via a right click menu option labelled Patient Referrals.
- Patient Forms can now be set to always add as a new form entry.
- Alternatively, they can be set to always clear the form questions when sending a "New" form to a patient who has filled it out before.
- Fixed issue with report names greater than 25 characters.
- EDI Manager time stamps will now more accurately reflect the submission date and time.
- Items added to the Document Manager Forms section are now password protected.
- The Team Huddle Report can now be printed in colour.
- Bar graphs can now use custom colours and ordering method.
- Streamlined Insurance Details window so the user sees the same, "all in one" insurance window regardless of access point.
- The Insurance Billing Order window now lists the Policy Holder's name for your convenience.
- Safecom Imaging 2.1 integration complete.
- CADI Imaging Bridge improvements.
- DTX Studio Bridge implemented.
- CDA Fee Guide agreement implemented, appears during fee update process.