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POWER PRACTICE 4.8 ENHANCEMENTS

Exan Group

HENRY SCHEIN®

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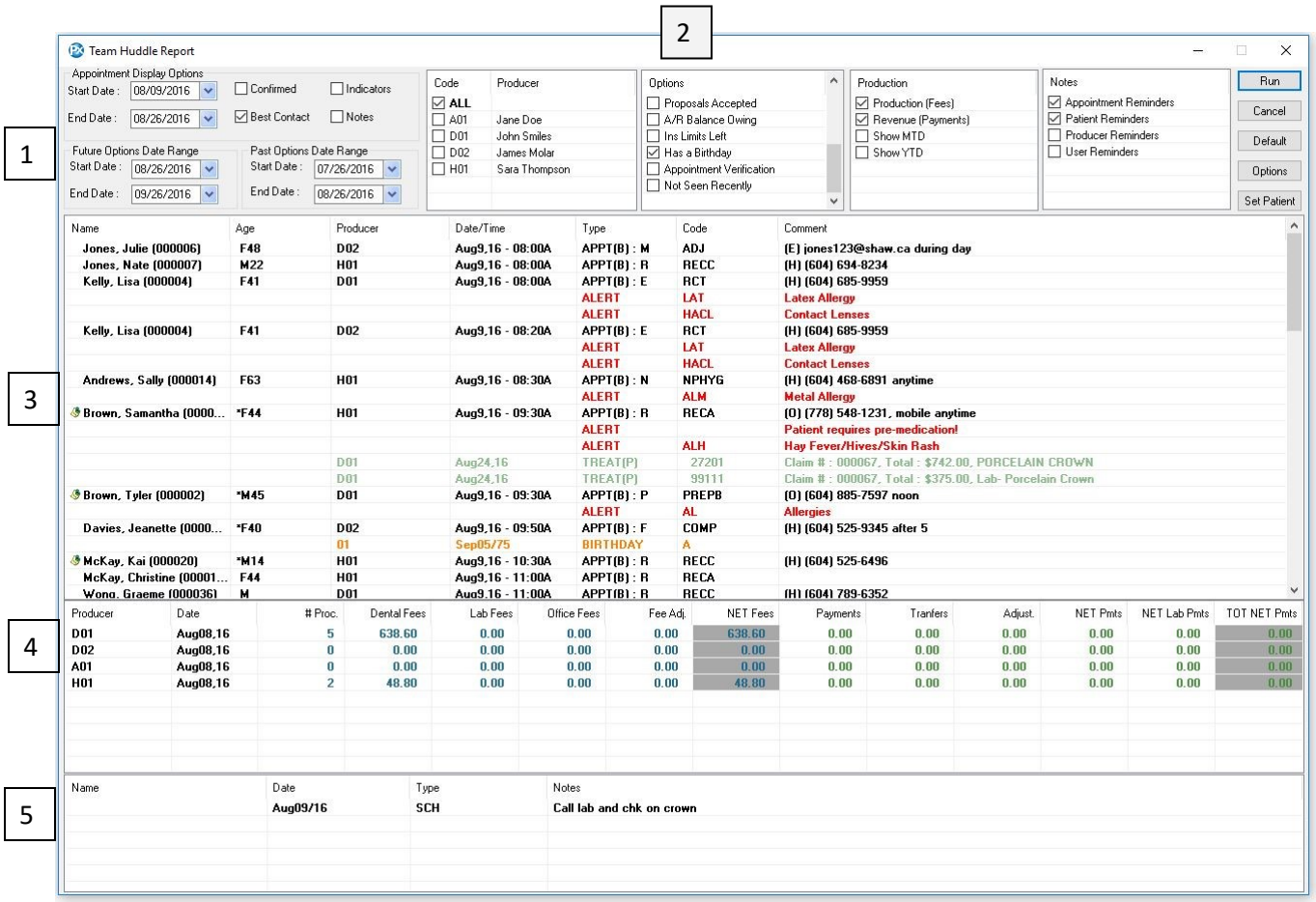
TEAM HUDDLE

This is a new reporting option that can be used in your morning meetings. Team Huddle is accessed through the Practice menu at the top of Power Practice. You can show appointments, patient alerts, scheduler notes, revenue.



1. Date ranges to set
2. Items to display
3. Display area for appointments and Options chosen
4. Display area for Production if chosen to display
5. Display area for notes if chosen to display

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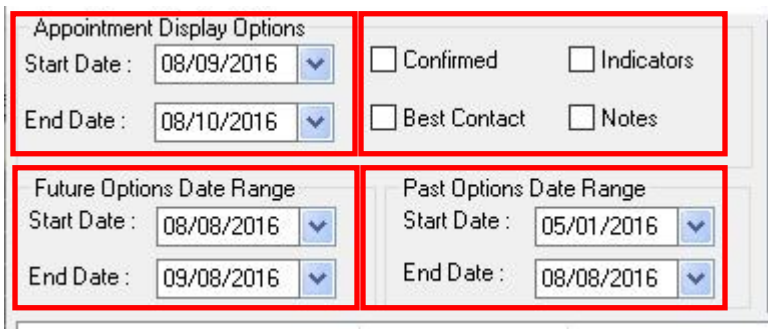
Team Huddle Features

Appointment Display Options

Choose the date range of the appointments to display. The default is today's date.

Future Options Date Range

Choose a date range to display future information of the Options chosen.



Tick boxes

Confirmed: show if appointments are confirmed or not

Best Contact: show patient's Best Contact information

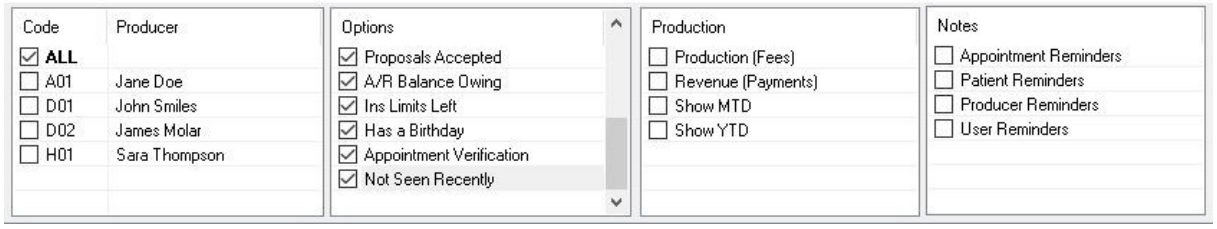
Indicators: show patient appointment indicators

Notes: show appointment notes

Past Options Date Range

Choose a date range to display past information of the Options chosen.

Information To Display



Code -Producer: choose All or individual producers

Options: choose what you want to view in the display area

Production: choose to view production or revenue. Will show Production/Revenue for the day before the Appointment Display Options Start Date that is chosen

Notes: choose which notes to view

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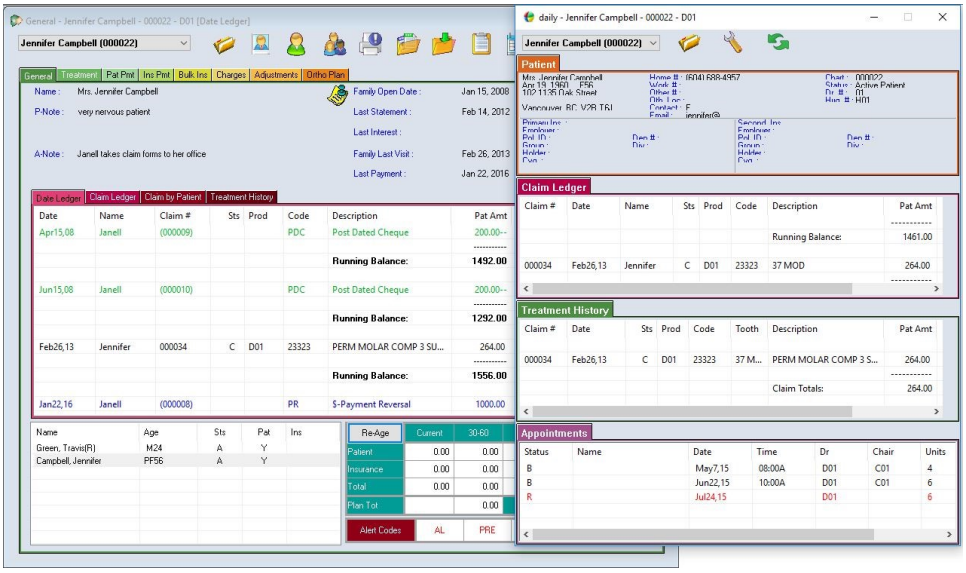
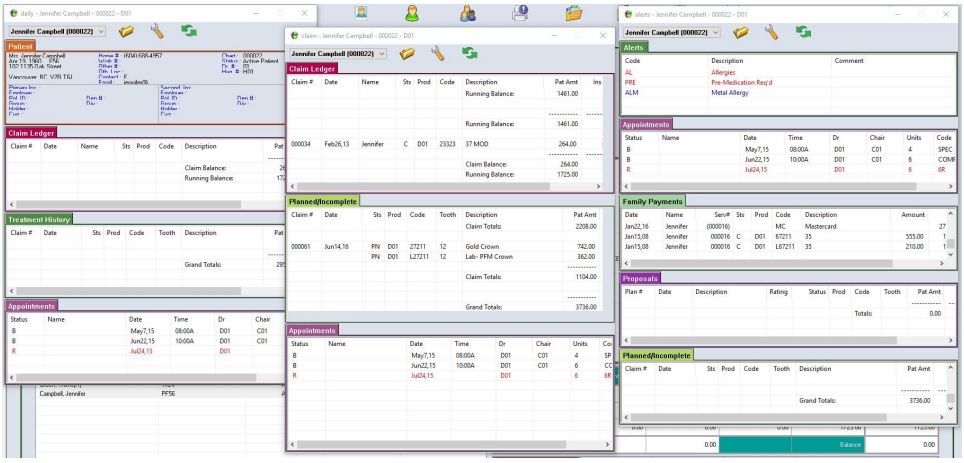
PATIENT INFORMATION SCREEN(S)

View more than one module or area of the program all on one screen. Choose up to 3 different "screen shots" to view. These screen shots can be moved around and have a right click menu to take you to other modules of Power Practice. This new option is user based so each user can have their own views.





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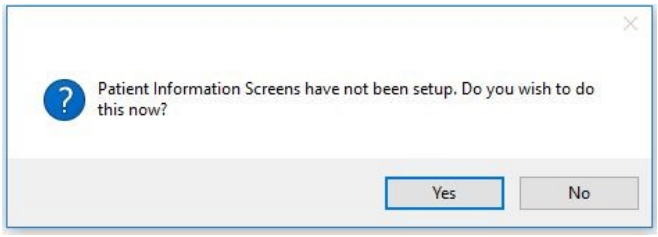
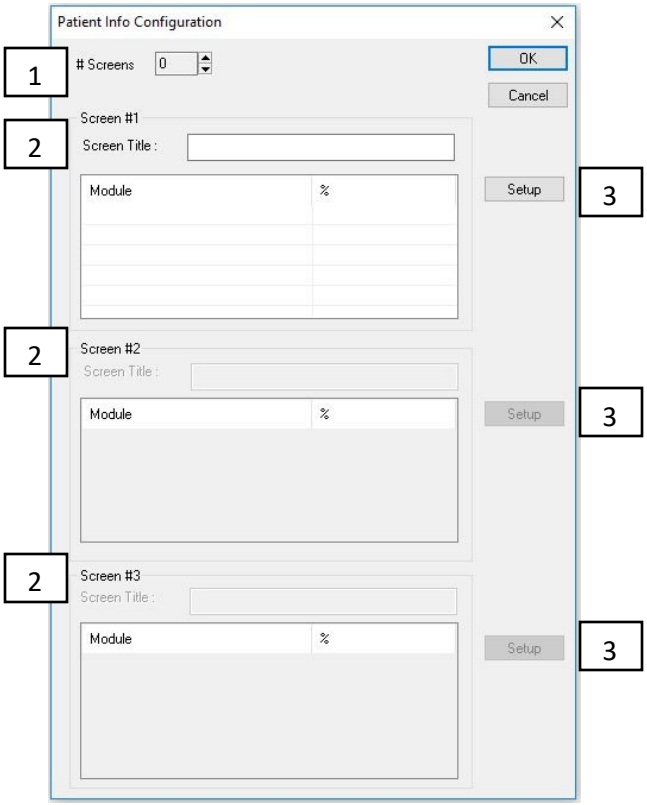
Patient Information Setup

Accessed under the **Patient** menu along the top of Power Practice, click on Patient Information. Click Yes to the following screen.



1. **# Screens:** Choose the number of screens you want to view
2. **Screen Title:** Each screen created will need a title
3. **Setup:** click this to set up each screen view



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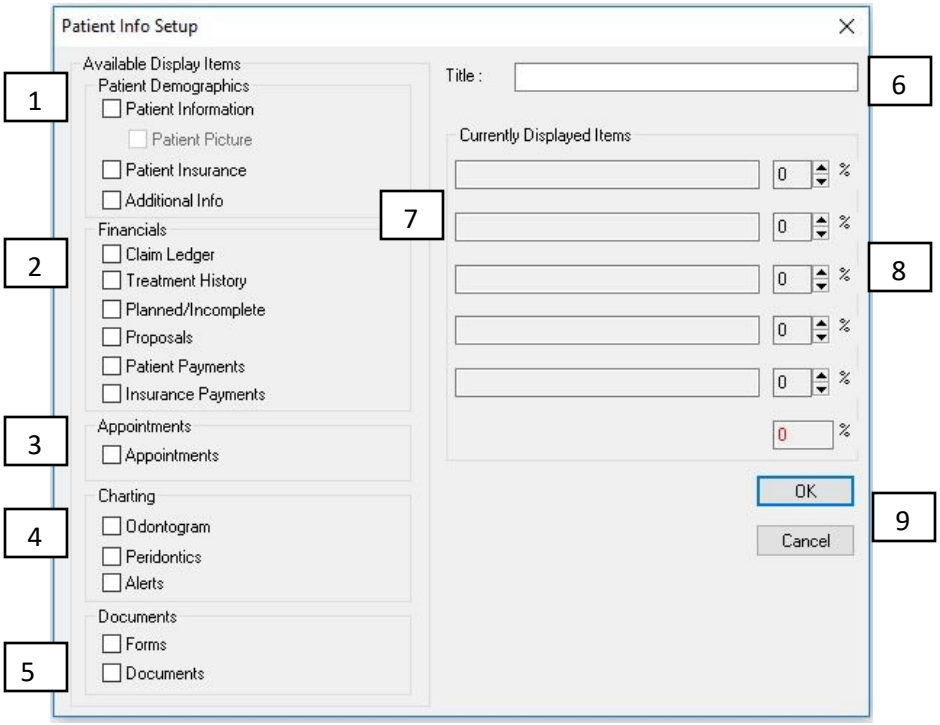
Patient Info Setup



Available Display Items

1. **Patient Demographics NOTE:** *These will show on one section of the screen and not in separate areas for each selection*

   Patient Information: Shows the patient personal information from the Patient module.

   Patient Picture: Shows the patient picture from the Patient module.

   Patient Insurance: Shows the patient insurance information from the Patient module.

   Additional Info: Shows the patient additional information screen from the Patient module.

2. **Financials**

   Claim Ledger: Shows the patient claim ledger from the Transactions module.

   Treatment History: Shows the patient treatment history from the Transactions module.

   Planned/Incomplete: Shows the patient Planned/Incomplete treatment from the Transactions module.

   Proposals: Shows the patient proposals from the Treatment Proposals module.

   Patient Payments: Shows the Family Payments from the Transactions module.

   Insurance Payments: Shows the Insurance Payments from the Transactions module.

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3. **Appointments**

   Appointments: Shows the patient Appointment History from the scheduler.

4. **Charting**

   Odontogram(if activated): Shows the odontogram for the patient.

   Periodontics(if activated): Shows the patient Periodontics module.

   Alerts: Shows the patient slerts from the Patient file and the Chart alerts (if activated).

5. **Documents**

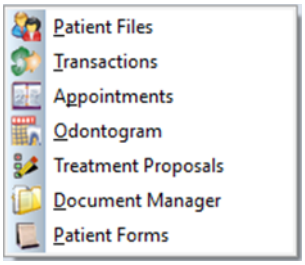
   Forms(if activated): Shows forms entered for the patient.

   Documents: Shows documents scanned/added to the patient.

6. **Title:** Title given to the current screen view.
7. **Currently Display Items:** Shows items ticked from the left side menus.
8. **Percent dials:** All items chosen together must equal 100%. You can manually adjust them or use what the system chooses.
9. **OK and Cancel Buttons:** OK keeps your chosen settings. Cancel closes without saving your settings.

Right-Click Menu

Right-click anywhere on the Patient Information screen to bring up a menu.



Patient Files: Opens the current patient in the Patient Files module.

Transactions: Opens the current patient in the Transactions module.

Appointments: Opens the Appointment Scheduler with the current patient active.

Odontogram(if activated): Opens chart with the current patient.

Treatment Proposals: Opens the current patient in the Treatment Proposals module.

Document Manager: Opens the current patient's Document Manager.

Patient Forms: Opens the Forms module for the current patient.

NOTES: *Once the screen (s) has been set up, they can be changed by going into the Wrench. The screens can also be moved around and re-sized.*

The active patient in the Patient Information screen will not change as you change patients in other modules unless using "Single Patient" mode.

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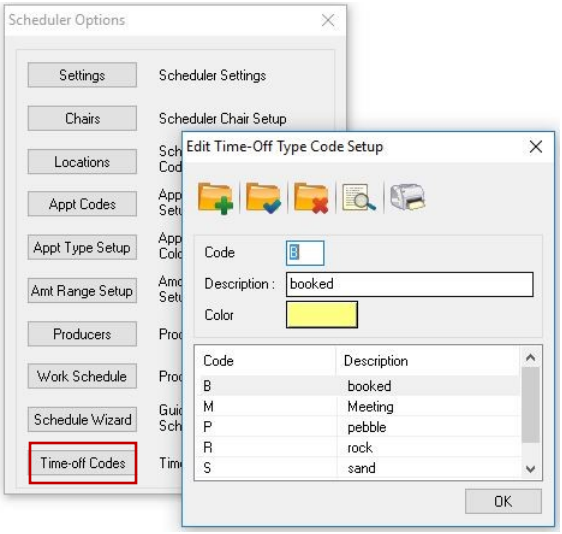
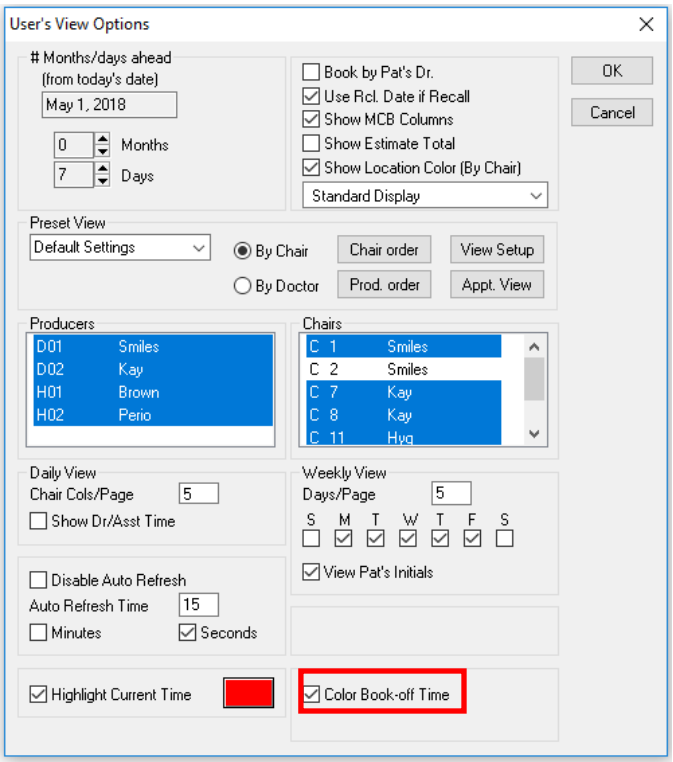
APPOINTMENT BOOK

Color Appointment Time Off

Choose the colors that you use to book off time for meetings or specific treatment slots.
In Scheduler Setup click on Time-off Codes.



To view, go into the scheduler's User View Options and select **Color Book-off Time.**



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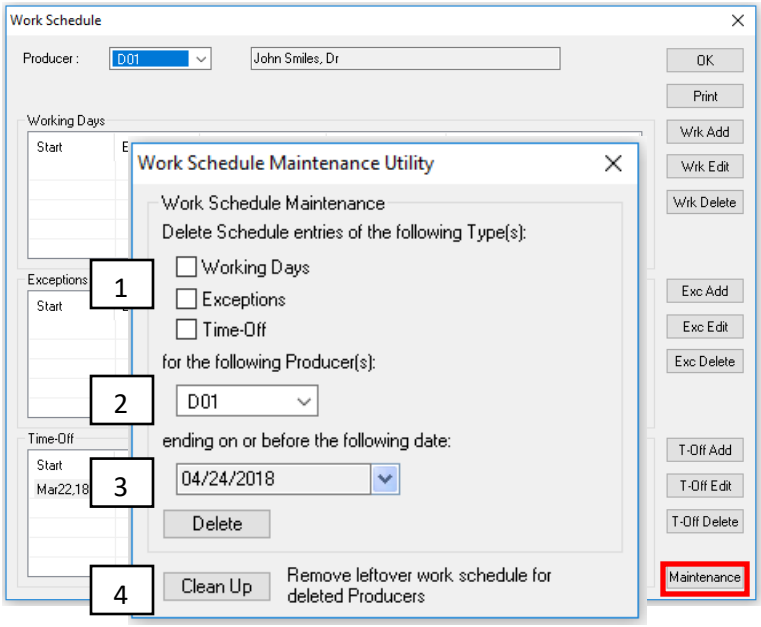
WORK SCHEDULE MAINTENANCE UTILITY

There is a utility to help you delete work schedule entries for one producer at a time or all producers. The utility is on the bottom right corner of the Work Schedule screen.



Delete Schedule entries of the following Type(s):

1. **Working Days –**Select this option to delete Working Days entries.
   Exceptions - Select this option to delete Exceptions entries.
   Time Off– Select this option to delete Time Off entries.
2. **for the following Producer(s):**
   Select a specific producer from the dropdown or Select * For all
3. **ending on or before the following date:** Select the date up to and including the date to delete to. When ready, select the **Delete** button.
4. **Clean Up** button. **Remove leftover work schedule entries for deleted producers** If a producer has been deleted instead of inactivated, this will delete any work schedule entries still attached to them.

Other Appointment Book Enhancements

- Unscheduling an appointment turns off the "Confirmed" flag.
- New item on the right-click menu. Change To: Unconfirm. Change To: Clear Status.
- Two new right-click items on the user menu, "Revert View Settings" and "Keep View Settings" to be used when a search or "go to appointment" causes only one column to show.
- When changing a Planned appointment to Booked, the linked treatment will follow.
- A date will now show the last time the scheduler was purged.

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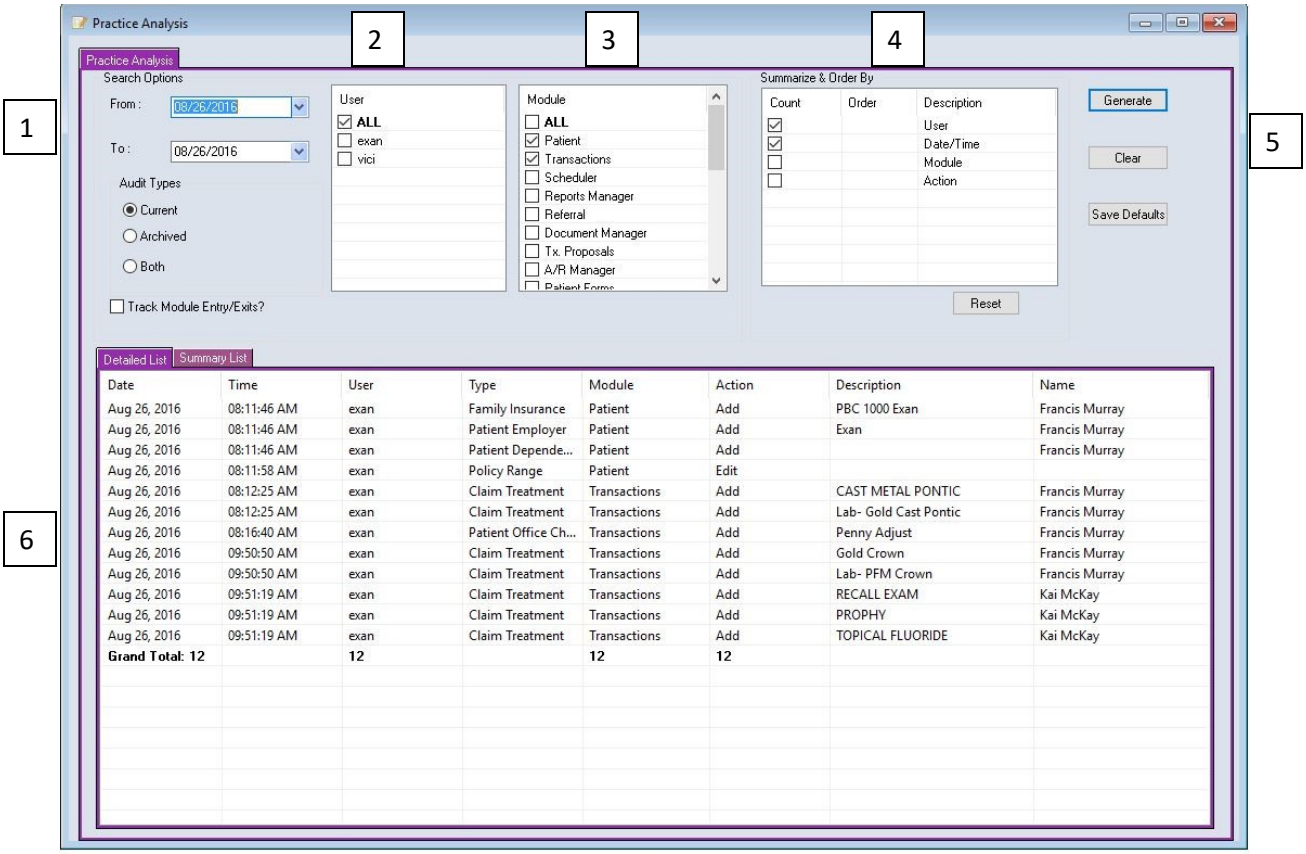
PRACTICE ANALYSIS

Designed for practitioners or office managers. Practice Analysis is used to track and analyze the movements of Power Practice staff.



1. Date range to search on.
2. Users to search on.
3. Modules to search on.
4. Summarize and Order By.
5. Generate-run the report, Clear-clear your selections, Save Defaults-save your settings as defaults.
6. Report display.

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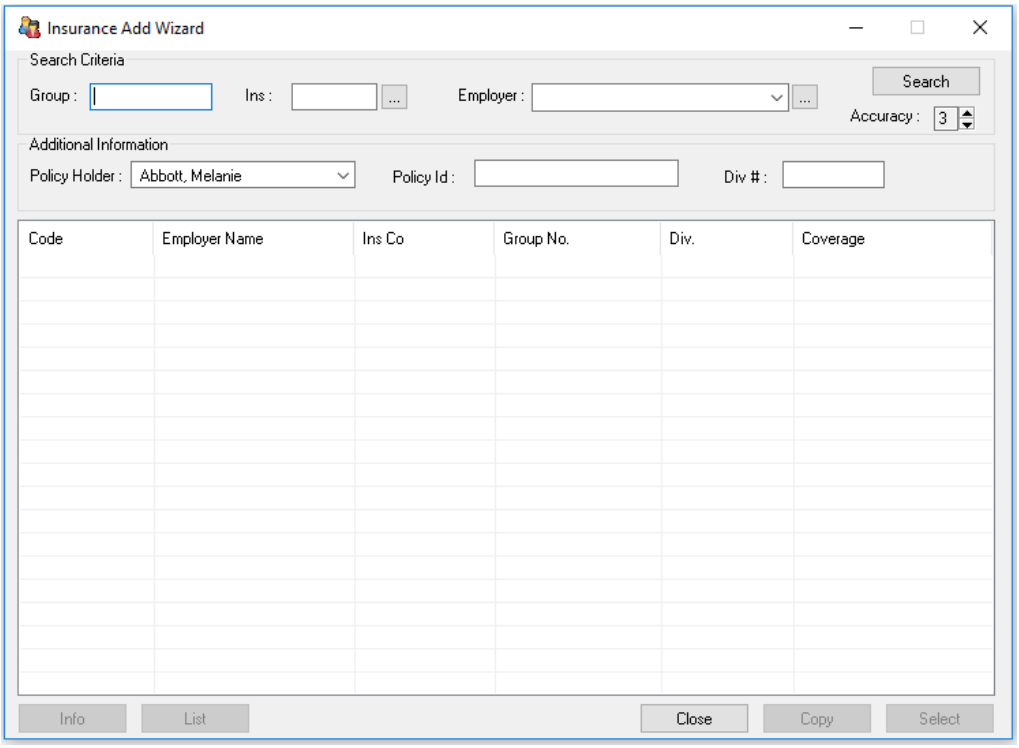
INSURANCE WIZARD

The Insurance Wizard will activate when you click on the icon to Create Record on the Insurance tab of the Patient File. You can search by Group, Ins (insurance company) or Employer.

You can add a policy that is new to your office with the Insurance Wizard.



Click on the Green Plus to Create Record. The Insurance Add Wizard will open with the Policy Holder showing the patient you've selected to add the policy to.

Search Criteria: Enter in a Group number, Insurance Company or an Employer name or a combination of the three to search on.
Accuracy: Set the accuracy of your search, do you want an exact match or a similar match?
Search: Click the Search button to generate your list.
Additional Information: Change the Policy Holder if it isn't the correct person, enter in their Policy ID and Division number if needed.
NOTE: *if the patient has an employer attached to them, then this will display in the Employer box.*

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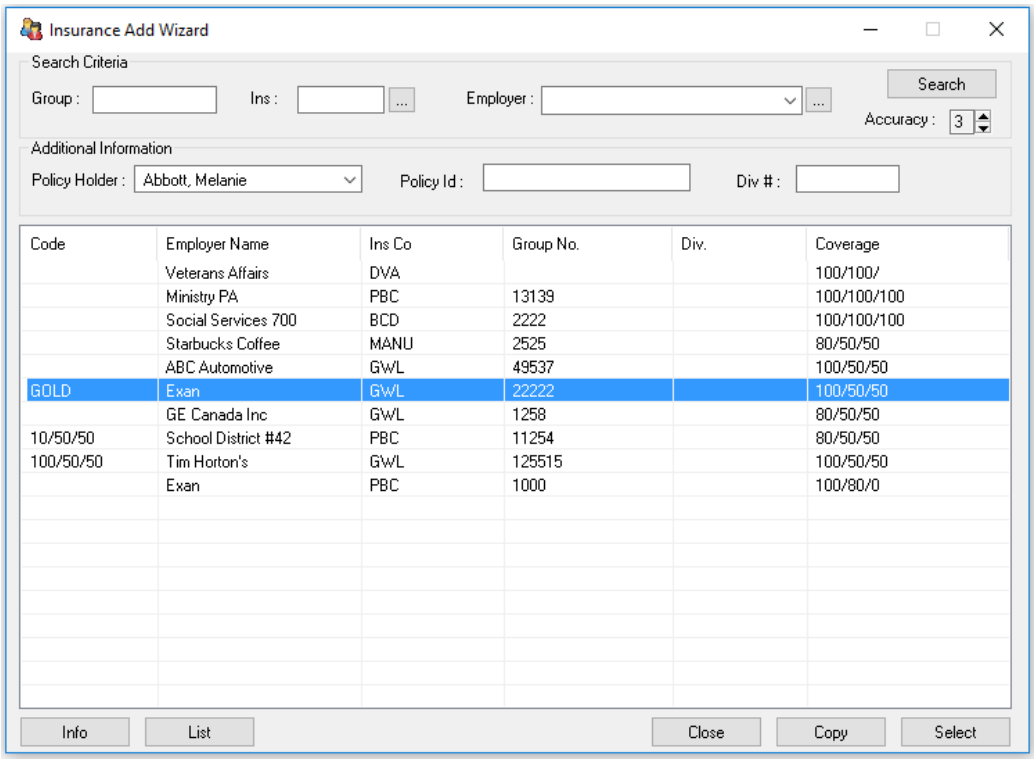
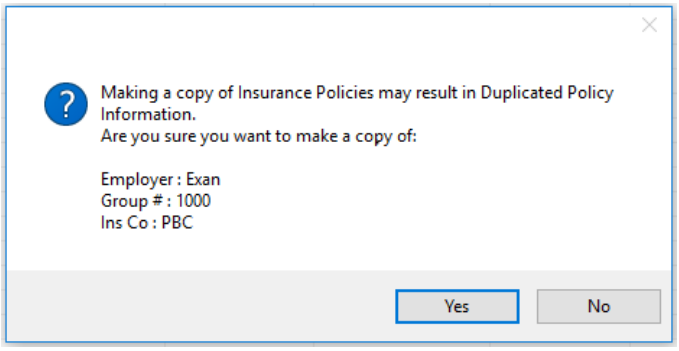


When a list is generated and a policy is highlighted, the bottom buttons will become active.

Info: Display the Policy Details of the policy highlighted.
List: Will list all patients who have the highlighted policy.
Close: Will close the Insurance Add Wizard.
Copy: Will create a duplicate of the highlighted policy. A warning message will display:



Select: Will select the current policy to add to the patient. This will also add any limits and deductibles related to the policy. ***NOTE:*** *You will need to go into the dependents and update their Pat Limit Balance as needed.*

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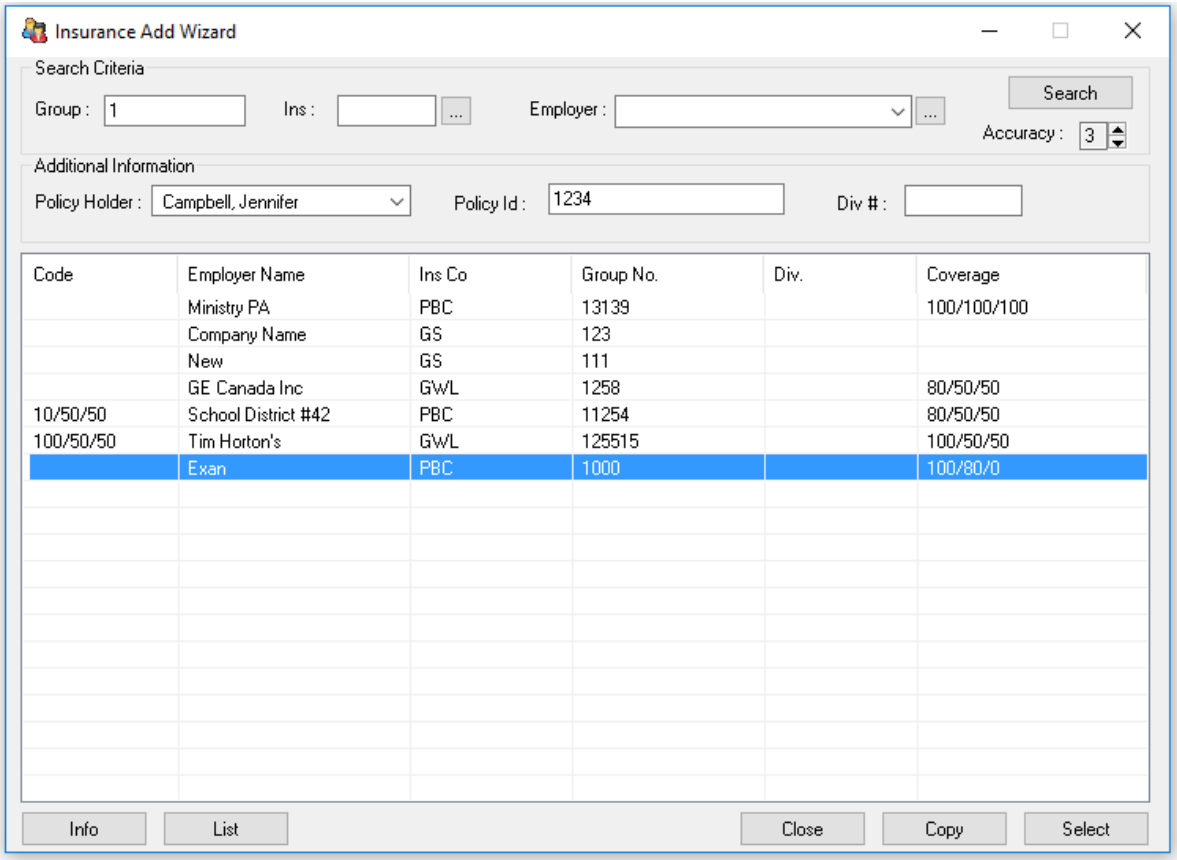
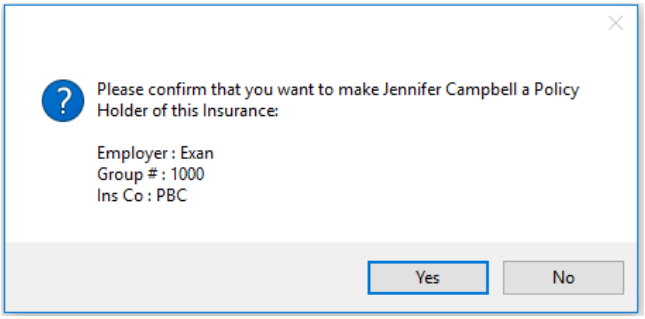
Adding an Existing Policy with the Insurance Add Wizard



1. Search for the policy you want to add by entering in one or all of the Search Criteria. Highlight it in the list.
2. Enter in the Policy ID and Div#.
3. Press the Select button. A confirmation message will pop up.
4. Choosing Yes will add the policy to the patient with the information you've entered.



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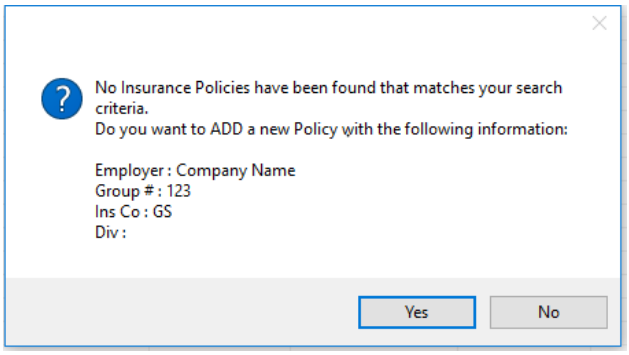
Adding a New Policy with the Insurance Add Wizard

A policy that is new to your office can be added with the Insurance Add Wizard.

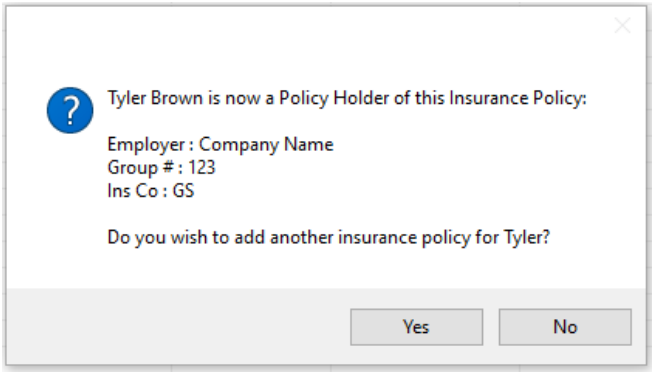
- Enter the information for the policy into the Search Criteria; Group , Insurance Company, Employer and the Additional Information; Policy Holder, Policy ID and Div# (if required).
- Select the Search button. This message will display:



If the information is correct, select Yes. You will then be asked if you wish to enter and limits and/or deductibles for this policy. You can then enter in the Patient Limits and Deductibles.

Next you will be prompted to add Policy Coverage Ranges. This is where you would Borrow a coverage template and adjust it for the policy.

Once all the policy information has been entered this message will display:



Selecting Yes will clear the Search Criteria to allow you to enter another policy.

Selecting No, will add the policy to the patient and close the Insurance Add Wizard.

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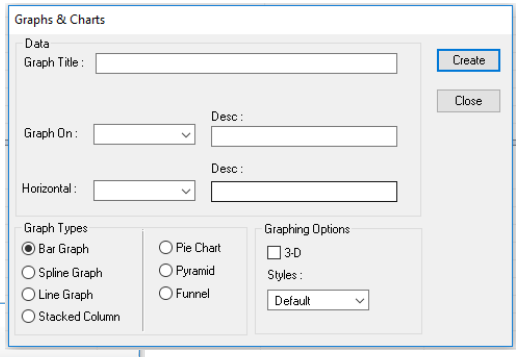
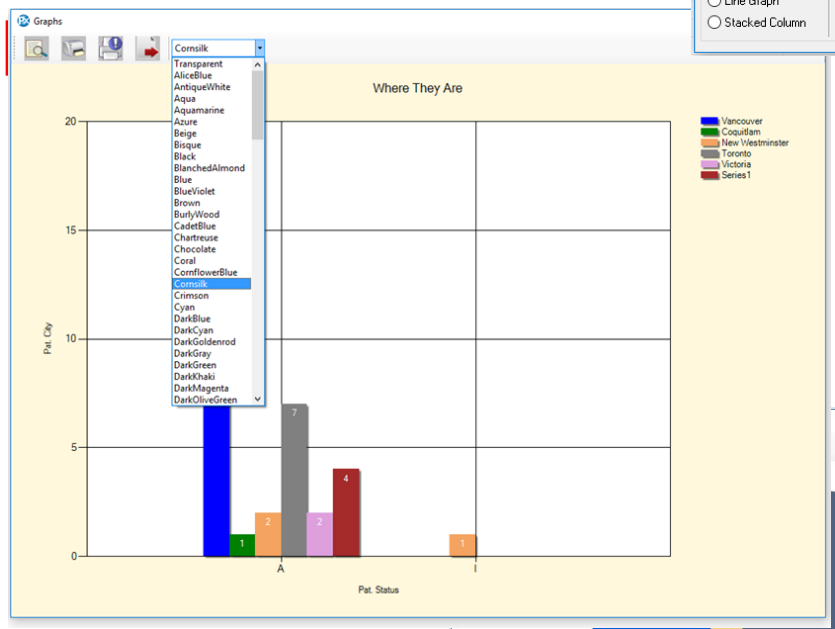
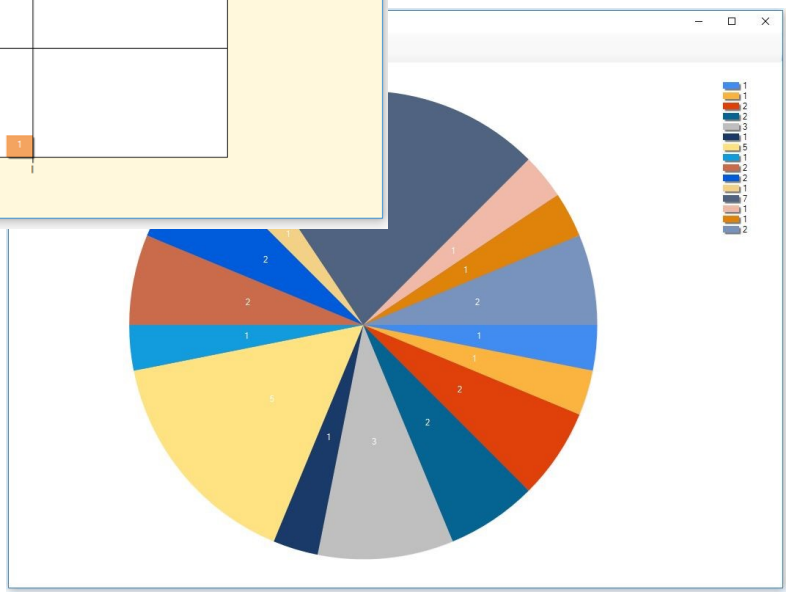
INFO MANAGER GRAPHS

Graphs can now be generated from the Info Manager. Create your report then select the Graph button. Design your graph with the options available including 3D. Select the Create button to see the graph.



At the top of the graph are icons for **Preview, Print, Print Setup, Save As** (save the graph as a jpg.) and a menu to select a different background color for the





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CUSTOMIZE PROPOSAL LETTERS, PAYMENT RECEIPTS, AND TAX RECEIPTS

Customize your proposal (estimate) letters, payment receipts and tax receipts with mail merge. You will need Microsoft Word for this feature.

A template for each area has been created for you and is available for use. This template can be adjusted or new one's can be created to match your office colors and fonts and logos can be added.

There is also an option to save these to the Document Manager.

NOTE: *Word should be linked to Power Practice to use this feature. A working knowledge of Word is needed if altering these documents.*

Proposal template that comes with Power Practice.

PROPOSED COURSE OF TREATMENT

John Smiles
1963 Lougheed Highway
Coquitlam, BC V3K 3T8

Sharon Maxwell
123 Stewart St.
Vancouver, BC V5Z1R6

Treatment Plan Date: October 07, 2016

Procedure Description	Code	Tooth	Surf	Pat Fee	Ins Fee	Total Fee
Gold Crown	27211	17		1104.00	0.00	1104.00
1 SIMPLE EXO	71101	18		117.00	0.00	117.00
Gold Crown	27211	16		1104.00	0.00	1104.00

ESTIMATED AMOUNT to be PAID by PATIENT	$ 2325.00
ESTIMATED AMOUNT COVERED by INSURANCE	$ 0.00
TOTAL ESTIMATED FEE	$ 2325.00

John Smiles * 1963 Lougheed Highway * Coquitlam, BC V3K 3T8
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www.powerpractice.ca

PROPOSED COURSE OF TREATMENT

John Smiles
1963 Lougheed Highway
Coquitlam, BC V3K 3T8

Sharon Maxwell
123 Stewart St.
Vancouver, BC V5Z1R6

Treatment Plan Date: October 07, 2016
Treatment Plan Number:

Procedure Description	Code	Tooth	Surf	Pat Fee	Ins Fee	Total Fee
Gold Crown	27211	12		1104.00	0.00	1104.00

ESTIMATED AMOUNT to be PAID by PATIENT	$ 1104.00
ESTIMATED AMOUNT COVERED by INSURANCE	$ 0.00
TOTAL ESTIMATED FEE	$ 1104.00

John Smiles * 1963 Lougheed Highway * Coquitlam, BC V3K 3T8
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Template color and font adjusted for Proposals.

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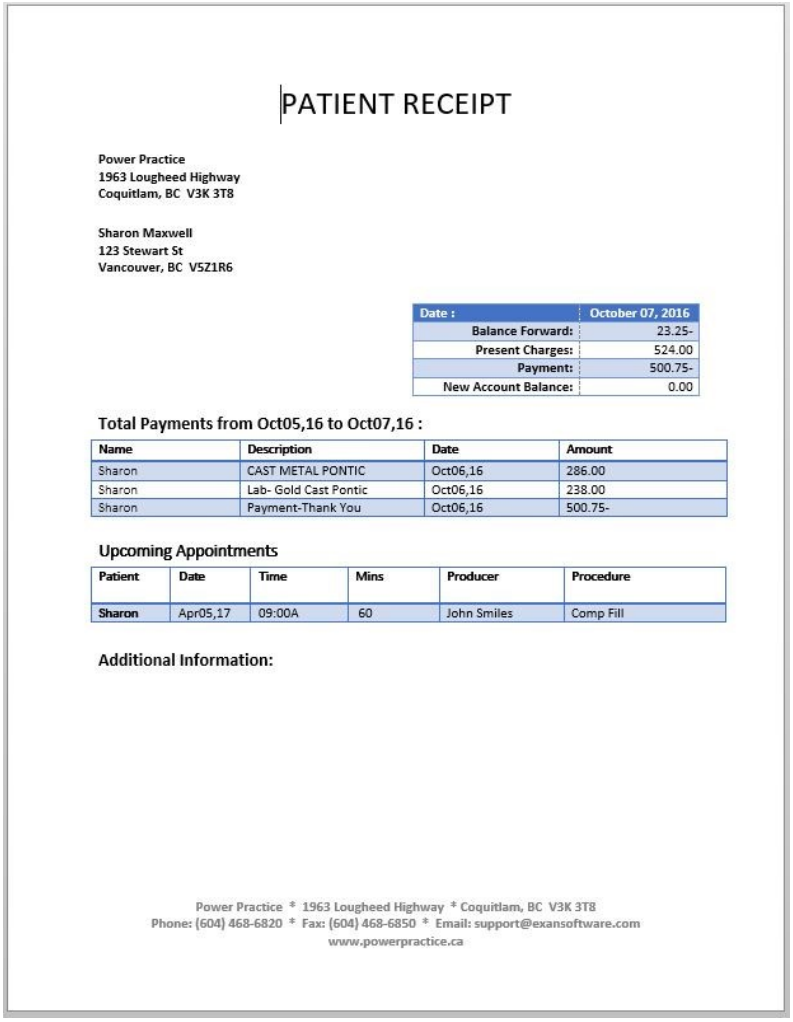
Patient Receipt from the template that comes with Power Practice.



PATIENT RECEIPT

Power Practice
1963 Lougheed Highway
Coquitlam, BC V3K 3T8

Sharon Maxwell
123 Stewart St
Vancouver, BC V5Z1R6

Date :	October 07, 2016
Balance Forward:	23.25-
Present Charges:	524.00
Payment:	500.75-
New Account Balance:	0.00

Total Payments from Oct05,16 to Oct07,16 :

Name	Description	Date	Amount
Sharon	CAST METAL PONTIC	Oct06,16	286.00
Sharon	Lab- Gold Cast Pontic	Oct06,16	238.00
Sharon	Payment-Thank You	Oct06,16	500.75-

Upcoming Appointments

Patient	Date	Time	Mins	Producer	Procedure
Sharon	Apr05,17	09:00A	60	John Smiles	Comp Fill

Additional Information:

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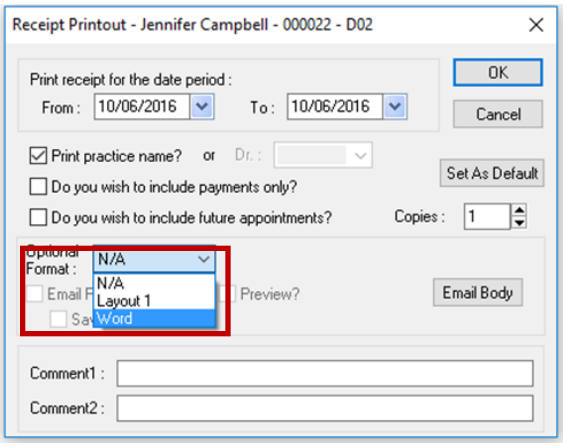
Using This New Feature

When you go to print, choose the third option under Optional Format for Word. Click OK.



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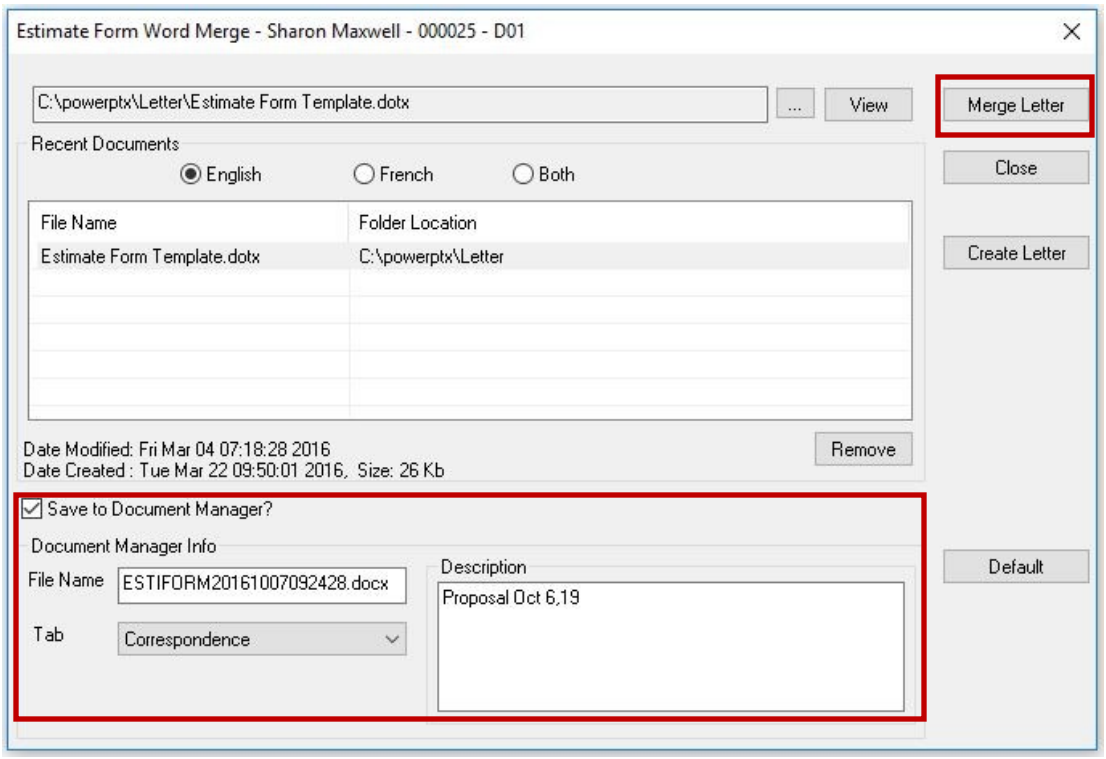

- Highlight the form template you want to use.
- Select the **Merge Letter** button and the receipt/proposal will open in Word.

If you are saving this to the Document Manager, tick **Save to Document Manager?** You can specify the tab to save to and add your own description. Default the folder you save the documents to by choosing the **Default** button.

The **Create Letter** button will open a Word document in Mail Merge format to create your own form.

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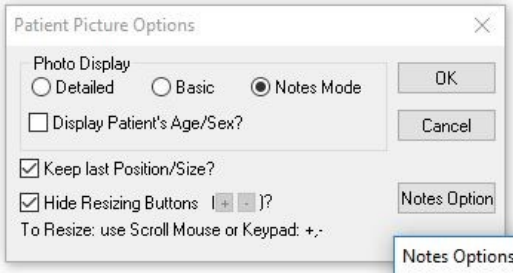
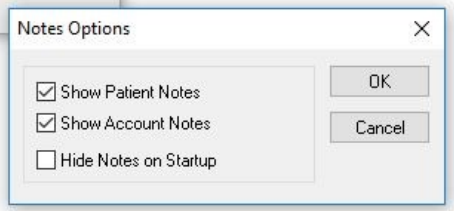
PATIENT PICTURE-NOTES

Add notes to the patient picture. You can also choose to view Patient Notes and Account Notes with the picture.

Right click on the patient's picture and choose Options from the menu.





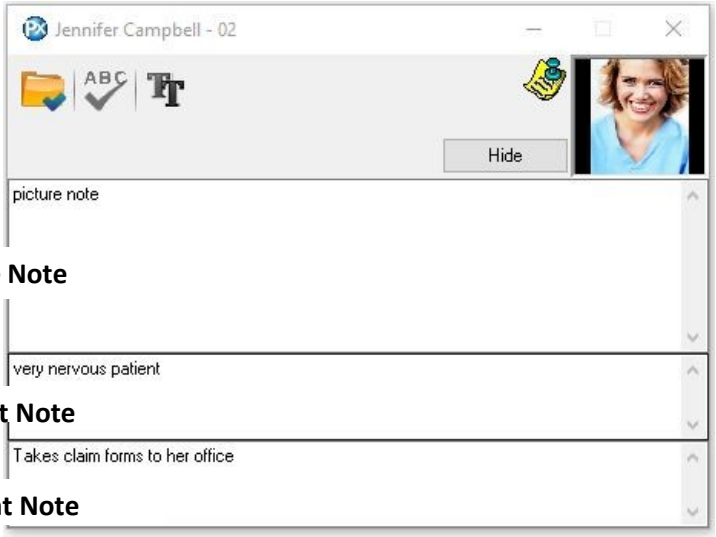
Patient Picture Options

Photo Display

Detailed displays a bigger picture and shows the picture notes at the bottom. Hover the mouse on the picture itself to show the Patient Note.

Basic mouse over will show the picture note. No other notes will display.

Notes Mode Will show the Picture Note, Patient Note and Account Note in separate areas with a smaller patient picture in the right hand corner.



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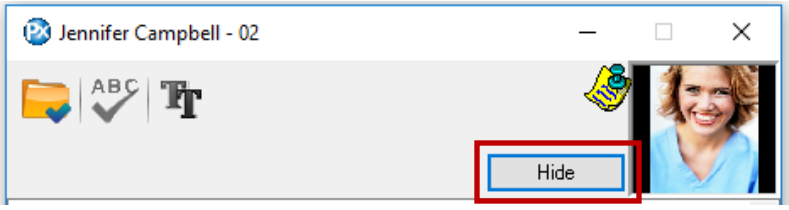
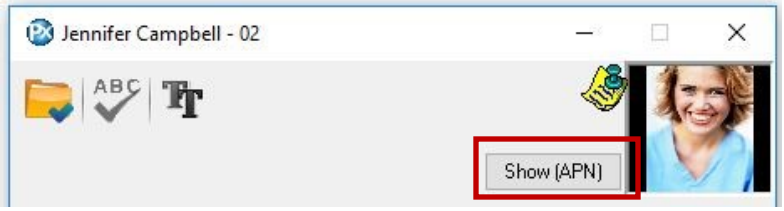
When you select the **Hide** button, it will change to **Show.** The letters in brackets will display if there is **A**ccount Note, **P**atient Note or Patient Picture **N**ote.





OTHER POWER PRACTICE ENHANCEMENTS

- Procedure Analysis and Payment Analysis can now be defaulted to print with both the Day End and Month End instead of just one or the other. Proposals can be submitted to the insurance electronically through Itrans.
- Claims can now be sent electronically for billing hygienists.
- Treatment Status (in Transactions under Month End Tasks) now has List By Summary.
- Coverage Templates in Maintenance can be copied and the new one adjusted.
- Statements-buttons have changed.
  - OK was changed to Print.
  - Cancel changed to Closed.
  - Statements can now be cancelled if the process has been started.
- Forms can now be sorted newest first

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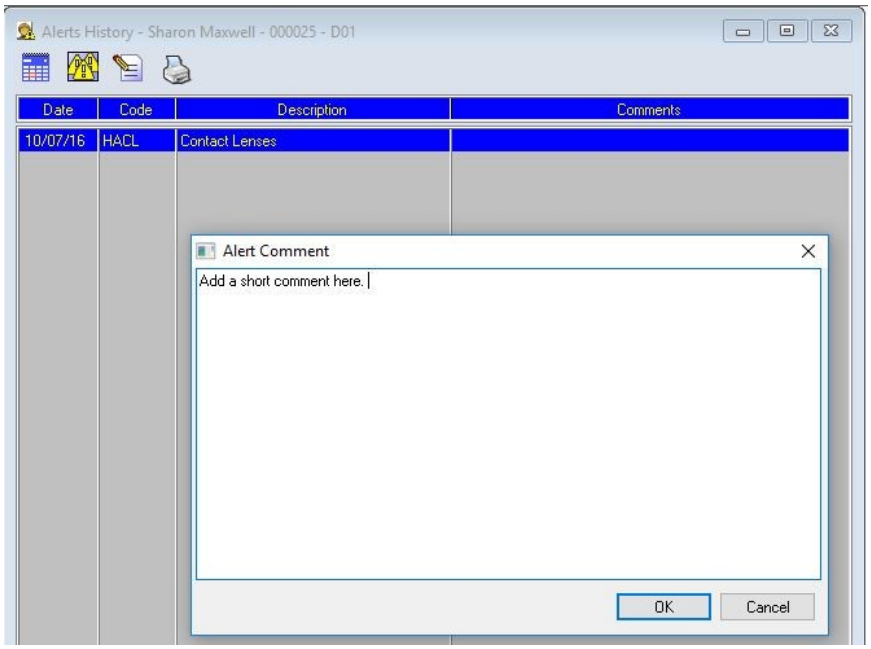
CHART-Medical Alert Comment

You can now add a SHORT comment to medical alerts in Alerts History.



- Highlight the **Alert** you want to add the note to. Select the **Edit Note** icon or double click on the Alert to open the **Alert Comment** box.

PERIO

New option on the **Perio Date Compare**. A drop-down menu to **Show: Normal, Highlight Differences, Differences Only.**

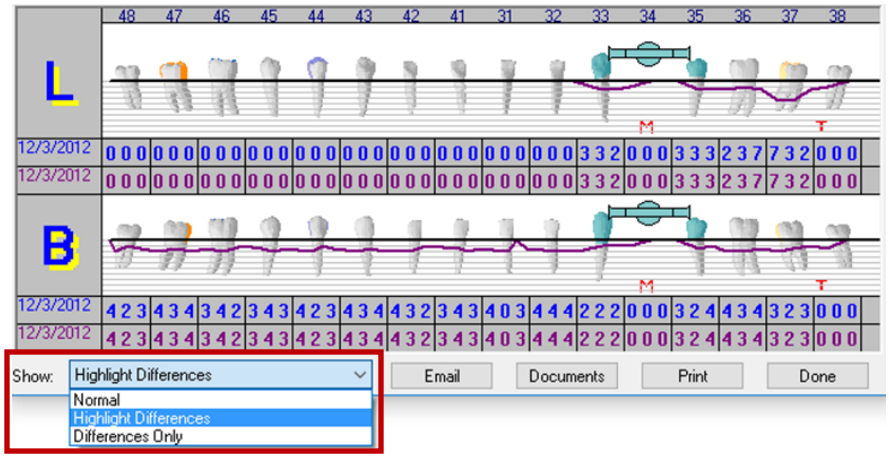


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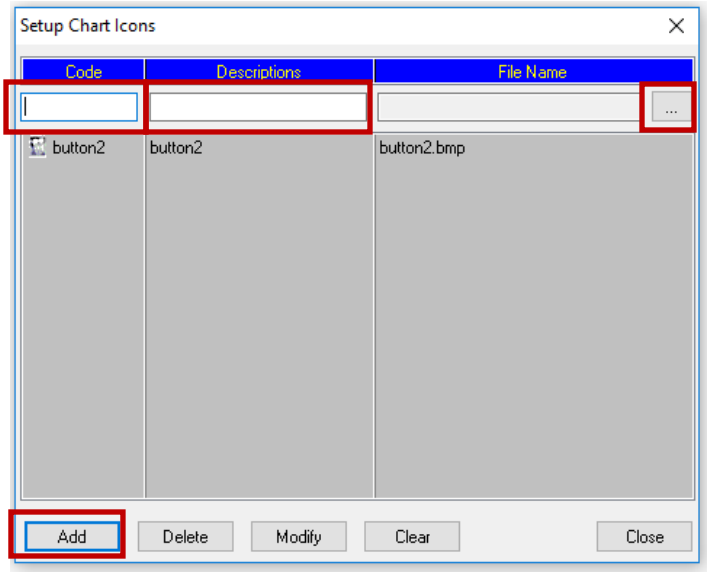
CHART ICONS-For Comments

Add your own icons to display with Chart Comments.

- From the **Chart** menu, choose **Setup Chart Icons.**
- Type the **Code** for the icon. (Up to 10 characters)
- Add a short **Description**.
- Select the **ellipse** button (…) and browse to the icon you want to use.
- Select the **Add** button.



In **Comments History** or when adding **Clinical Notes** you can choose the icon you've added from the Icon drop-down menu.

NOTE: *The icon must be .bmp format and cannot be larger than 16X16 pixels.*

OTHER CHART ENHANCEMENTS

- Automatically clear Caries and Fractures set as conditions from tooth when posting fillings or crowns. Set this up in **Customize Chart Settings**. "Automatically Remove Conditions" with options of "Never" , "Ask", "Always".
- Root canal colors can be changed.
- You will be asked to check out Planned Treatment if linking that treatment to a Planned Appointment.
- Can add a short comment to Alerts History.
- Can submit Proposals electronically from the Odontogram