New Features, Bug Fixes and Updates for Version 4.3.4

Please note: It is worth all staff spending time familiarising themselves with the contents of this document to maintain a current level of training, especially in regard to the new triage functionality which is a mandatory requirement for NHS practices and very useful for private practices. This document includes the feature updates for the new version as well as the previous version (at the end of this document) for the benefit of those practices who did not previously update to 4.3.3 or who would like a reminder of the previous updates.

New Features

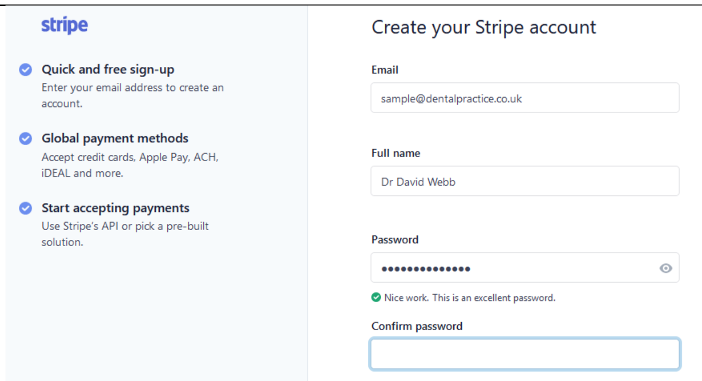
Online Payment Gateway

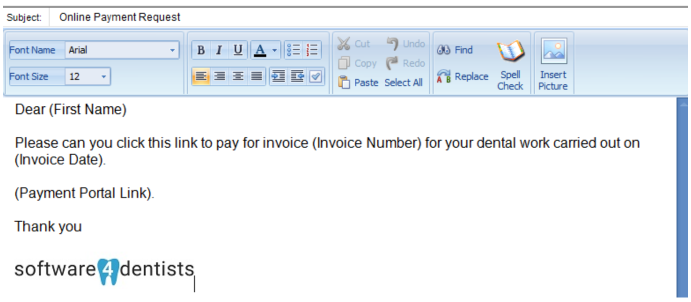
In order for payments to be taken online, we have created the Online Payment Gateway. This gateway has been based on the Stripe Payment Service as we have determined they offer the best rates to their customers. If your patient has not paid their invoice in full, or if they would rather pay online it using their own device, an invoice can immediately be sent to the gateway and the patient will receive an e-mail with a payment link in it. Clicking on the link, either on their home computer or smart phone will transfer them to the payment gateway where they can view their invoice and enter their card details to make a payment. If they use Apple Pay or Google Pay on their phone, they can also use that to make an instant no fuss payment. Once the payment is made, the data is transferred back to the Bridge-IT program which automatically allocates the payment to the relevant invoice and credits the patients account.

How does it work?

Here are some steps to demonstrate how the online payment gateway works.

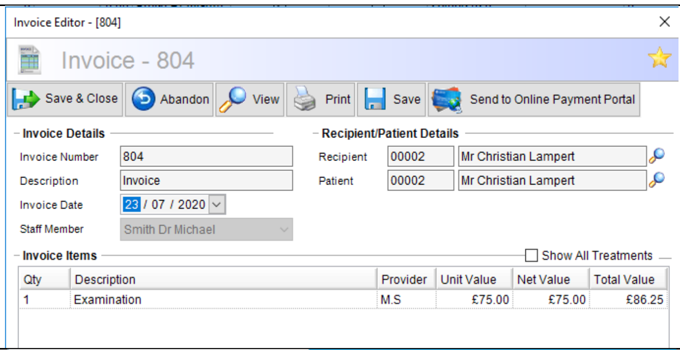
<table>
<tr>
<td>Step 1

Set up a Stripe account for the practice by visiting www.stripe.com</td>
<td>
</td>
</tr>
<tr>
<td>Step 2

Within V5, configure an e-mail that will be sent to the patient along with the request for payment.</td>
<td>
</td>
</tr>
</table>

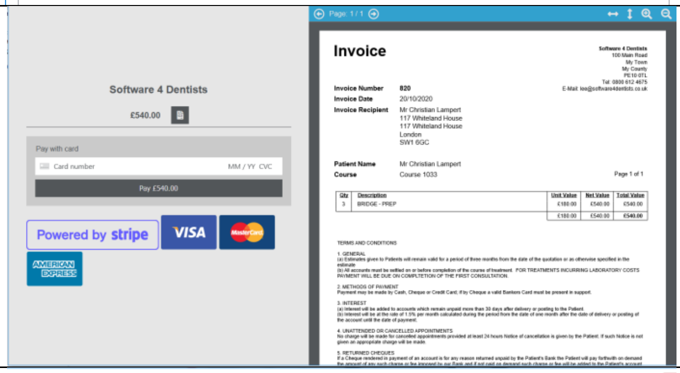
Step 3

Any invoice you create can immediately be sent for online payment by pressing the new “Send to Online Payment Gateway” button. This generates an e-mail to the patient with a payment link embedded within it.



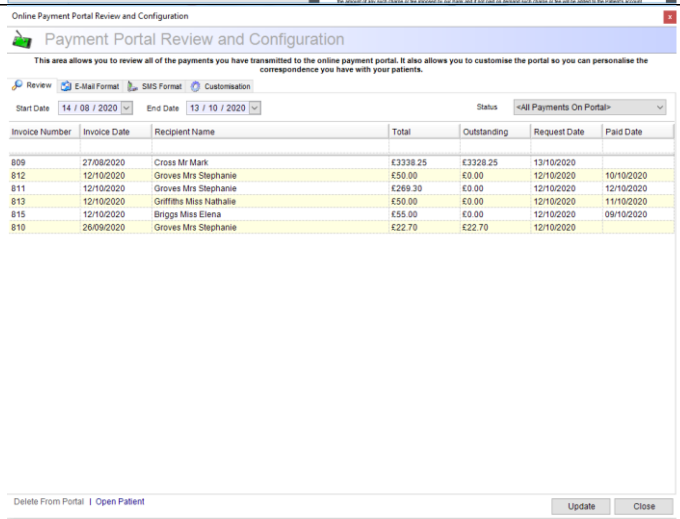
Step 4

Once the patient clicks the payment link they will automatically be transferred to the Online Payment Gateway where they can view their invoice and enter their card details to make a payment.



Step 5

The payment is uploaded back to V5 where the payment is allocated against the invoice. All invoices awaiting payment on the gateway, as well as those that have already been paid can instantly be viewed using the “Payment Gateway Review” area within the software.



How much does it cost?

For those customers who are already paying £55 per month for the web document portal, the new payment portal is available for just £15 per month. For customers who do not require the web form portal and only wish to use the payment portal, the cost is £40 per month.

COVID 19 Triage

The NHSBSA decided that rather than handling triage submissions within Compass they would like it handled within the practice management systems being used at the surgery. We have therefore worked tirelessly within a very short time frame to create a fully functioning triage system that complies with all the rules of the NHSBSA. **Please note:**, although this functionality is mandatory for NHS practices it will also be extremely useful for private only practices who are currently using various less than ideal methods to store their triage related data.

How does it work?

Step 1

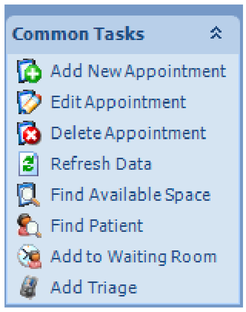
There are two ways of creating a triage from the diary.

1. If you are undecided as to whether to book an appointment and just want to triage the patient, select "Add Triage" from the "Common Tasks" area of the diary on the left (Method 1).

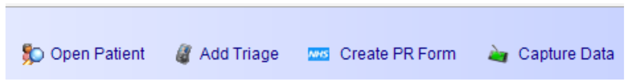
2. If the patient already has an appointment booked and you are triaging your patient before they come in, edit the appointment and select "Add Triage" from the "Common Tasks" area at the bottom of the dialogue (Method 2).

Please note: If you create a triage that is not attached to an appointment using Method 1, then go on to book an appointment with that patient within the next few days, the triage you took will automatically be attached to the appointment.

Method 1



Method 2

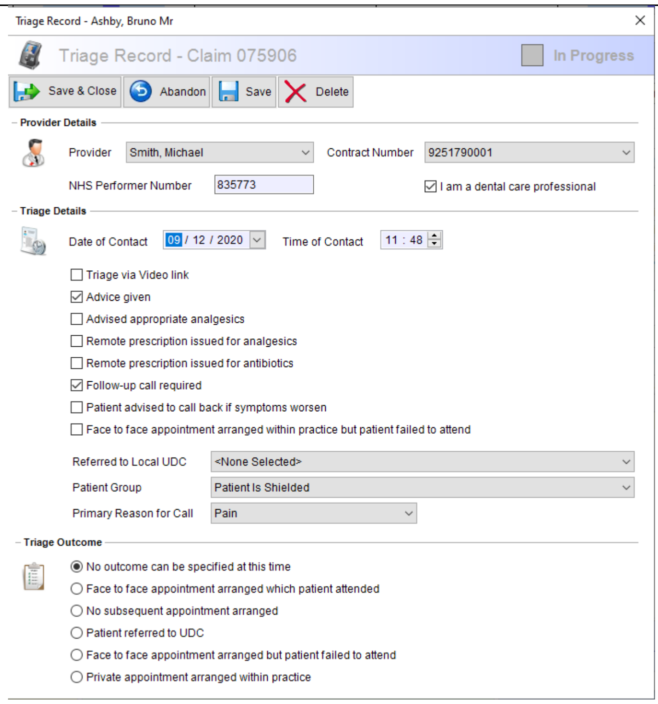


Step 2

The Triage dialogue will appear allowing you to record the details of the conversation with your patient and eventually the outcome of that triage. If it is uncertain what the outcome will be leave the outcome set to "No outcome can be specified at this time".

Each triage recorded is treated as an NHS claim and will be submitted over WebEDI along with your FP17/O claims on a regular basis. Only triage claims where the patient did not attend their appointment will ultimately be forwarded to the NHSBSA as the other triage data will be submitted on a completed FP17/O claim.

PLEASE NOTE: We have applied stringent rules to this system so it is not possible to submit a triage claim

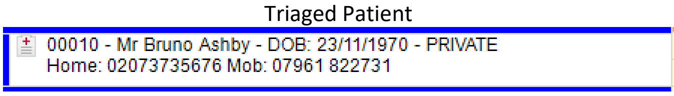


that is not in compliance with the NHS specification.

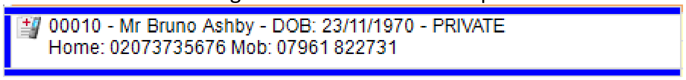
Step 3

An appointment that has a triage connected to it will show one of two icons in the diary. Either a standard triage icon, or a follow up icon which has a phone displayed against the triage icon.

Triaged Patient



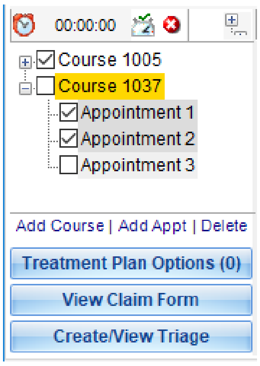
Triaged Patient with Follow Up



Step 4

A patient's triage claims can be all be viewed from the charting screen. You will notice the additional button "Create/View Triage" which, when selected, will display a configurable dialogue (Pic 2) allowing you to see triage's against each course and each provider. You can also create, edit and delete triage's from this area.
When an FP17/O is completed, any triage's taken will be allocated against that course of treatment and will appear in the FP17/O "Triage" tab (see Step 5).

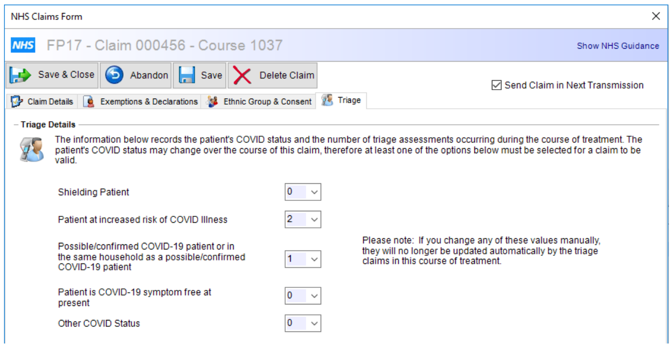
Pic 1



Pic 2

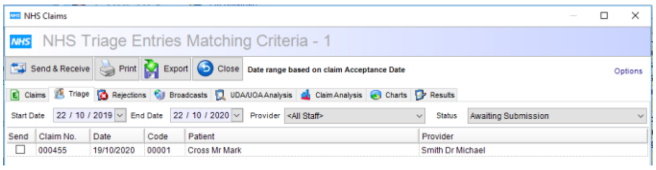
Step 5

All of the recorded triage entries will be accumulated and added to a new "Triage" tab on the FP17/O claim form. These results are also sent to the NHSBSA along with the individual triage claims that qualify for sending.
PLEASE NOTE: These entries are created automatically for you based on the individual triage claims. There should not be a need to manually change them. However we have made these boxes editable so if necessary it is possible to override the auto calculation of the software.



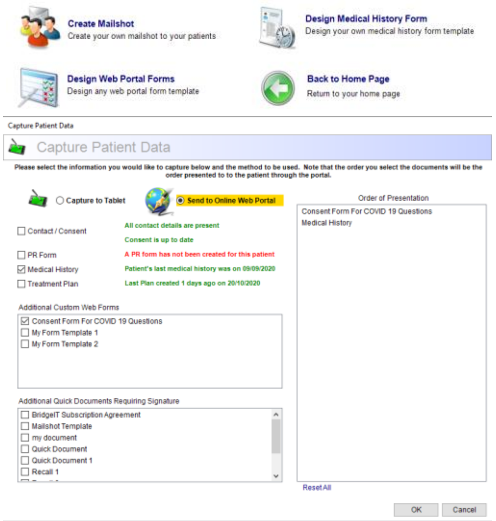
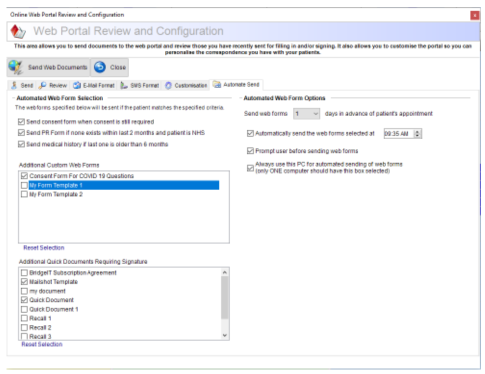
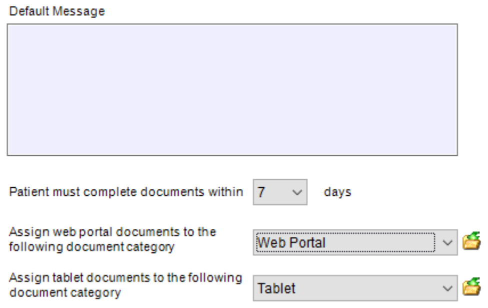
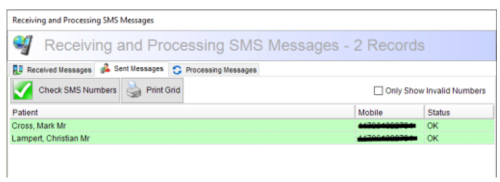
Step 6

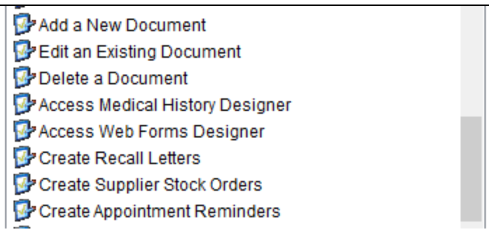
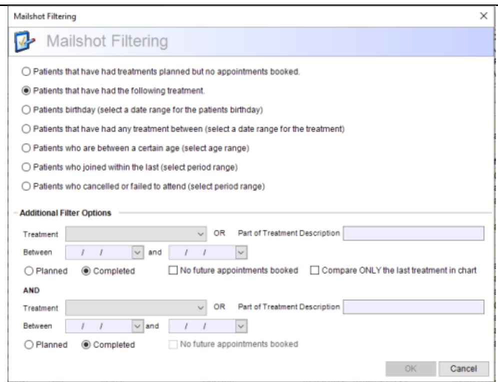
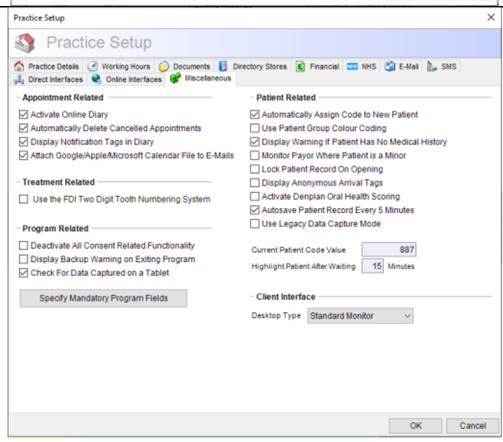
The triage claims are stored under a separate "Triage" tab in the NHS/Claims area. These will need to be submitted along with your usual claims on a regular basis. When you "Select All" on your "Claims" tab to send your standard FP17/O claims, the program will ask if you want to send the triage claims as well.

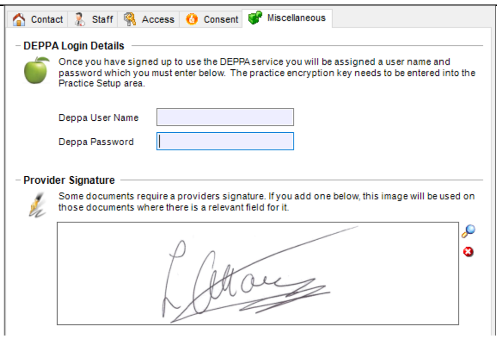


General Updates

4.3.4

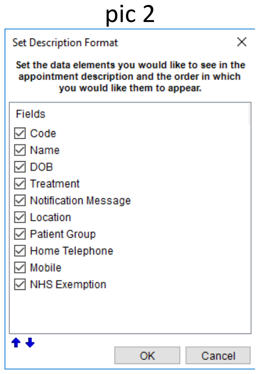
Description	How To Use	Example
In the previous version we introduced the medical history as a web form so it could be filled in online by your patients. In our new version you can create ANY web form and name it yourself. This will be useful for producing COVID-19 specific forms as these need to be sent far more frequently than medical histories.	Go to “Documents” on the left, and select “Design Web Portal Forms”. A dialogue will appear allowing to edit or add a new web form. Create the form in exactly the same way as the medical history and then select a name for your form in the right of the designer. This will then be available for sending to your patients.	
Automated and batch sending of web documents to patients due for an appointment. In the previous version, web documents had to be sent for each individual patient by going into their appointment. Now an entire day or week’s worth can be sent together, and the system can be automated to run at a specific time just like appointment reminders.	From the main menu at the top of the screen go to “Patient Portals” and then “Configure Web Forms Portal”. Under the “Automate Send” tab select the forms you want to be sent automatically and configure the auto send if you wish. Also on the “Send” tab you can select any patients that have appointments between the selected dates and send them manually.	
Rather than documents completed and/or signed from the web portal or on tablets being in the same list as all other documents under the “Documents” tab of the patient record, you can create and assign them to specific categories so you can easily filter the list in the patient “Documents” tab.	From the main menu at the top of the screen go to “Patient Portals” and then “Configure Web Forms Portal”. Under the “Customisation” tab, create a new category using the yellow folder, and then assign your web documents or tablet documents to that category.	
Facility to check that the mobile numbers you have been sending SMS texts to are correct. **PLEASE NOTE**: This function has only been built into the new version of the software, therefore it is not possible	Go to “SMS” from the menu at the top of the scree and select “View and Process SMS Messages”. Select the “Sent Messages” tab, and then press the “Check SMS Numbers” button. The status of	

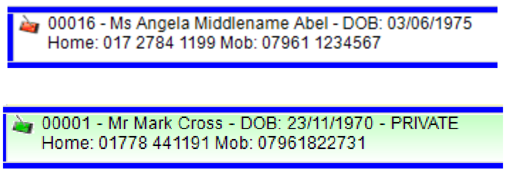
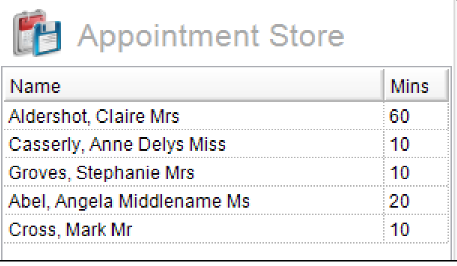
to check previous numbers, however any numbers used from the time you upgrade will be checkable.	each mobile number will be displayed and can be filtered by “Only Invalid Numbers” so you can contact those patients.	
New security tasks have been added so the practice manager can control access to both the medical history and web forms designer.	Go to “Security” on the left. If you don’t want a security group to be able to access these areas remove the tasks “Access Medical History Designer” and/or “Access Web Forms Designer”.	
New security task has been added to prevent users from changing clinical note templates.	Go to “Security” on the left. If you don’t want a security group to be able to access the clinical note template manager, remove the task “Manage Clinical Notes".	
When filtering a mailshot, there’s a new facility for comparing only the LAST treatment in a course of treatment.	Go to “Documents”, “Create Mailshot” and press the “Additional Filter options” button. When filtering by “Patients that have the following treatment”, you can tick the box to ONLY compare the last treatment in the course either completed or planned.	
When creating appointment related e-mails such as appointment reminders or appointment reminders, you can attach and ICS file which is compatible with a number of different mobile calendar programs including the standard Android and Apple calendars. This means patients who receive the e-mail can click on the attachment to automatically add the appointment to their calendar. PLEASE NOTE: ICS files may not work where the patient has installed a 3rd party calendar which is not compatible with the apple/android format.	If you want to attach an ICS file to your appointment reminders go to “File”, “Practice Settings” in the menu at the top of the screen. Select the “Miscellaneous” tab and tick the box “Attach Google/Apple/Microsoft Calendar File to E-Mails”.	

Automatically add the logged in providers signature to any word processor document you create in the software.	Create an image file (png, jpg, bmp) file of your signature. Go to “Staff Members” on the left, edit the staff member record and select the “Miscellaneous” tab. Browse to the image file and select it. Open your word processor document in the program and on the left choose “Provider Signature” to insert it into your document.	
On the cloud edition of the software you will no longer be able to upload files that are larger than 2MB. This is because an image file should never be larger than this size but we’ve add a number of instances where customers have been uploading huge files of many MB for a single one page document because of their scanner settings.	Automatic. If file is larger than 2MB the software will prevent a user from uploading the document.	

Appointment Diary Updates

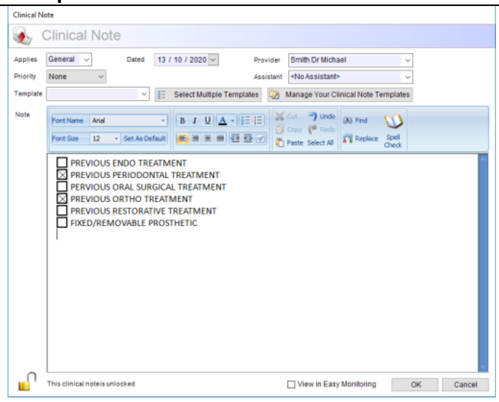
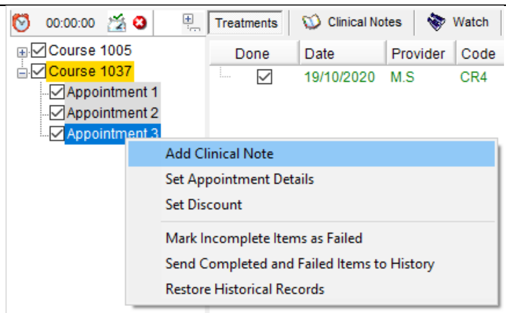
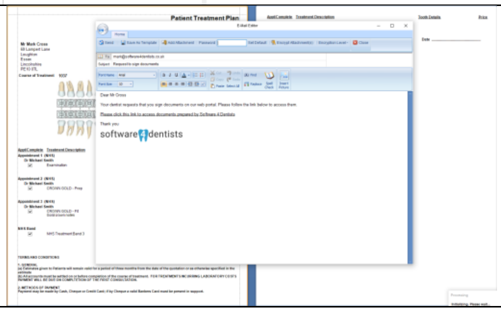
4.3.4

Description	How To Use	Example
Message entered against charted appointment in surgery can be added to description of appointment from the green notification tags.	In surgery, the dentist can double-click an appointment on the left of charting and enter additional appointment details to assist reception. The message that is entered on this dialogue can be added to the actual appointment description when an appointment is made for the patient (pic 1). To automatically add message to the appointment description, open any appointment and click on "Set Description Format" beneath the description box. Tick the new field "Notification Message" (pic 2). Please note you can order the fields in any way you like to make the description more readable. The next time you create an appointment from the green tag, any message connected to the appointment will become part of the description.	pic 1  pic 2 

An icon is displayed against all appointments where a “Web Form Document” has been sent and is waiting for entry on the web portal. The icon changes colour when the documents have been received.	Automatic when you send and receive web portal documents.	
The appointment store automatically shows the duration of the stored appointment takes, instead of having to hover over each entry to see the duration.	Automatic.	

Patient Record Updates

4.3.4

Description	How To Use	Example
Clinical notes can now have check boxes in them making it a lot easier to select conditions from a list.	Open a clinical note template where you believe check boxes may be useful. Position the cursor to where you want to place the check box, and press the “Insert Check Box” button which has the Tick symbol on the editor bar. Please note, the grid is unable to display check boxes, so they are replaces with “Y” or “N” in the text.	
For quickness, the ability to add a non-treatment specific clinical note to your patient has been added on the right click menu of the course appointment. This note, although attached to the appointment will not be attached to any treatment.	Right click on an appointment in the chart and select “Add Clinical Note” to create a general note that is not attached to a specific treatment.	
When sending a treatment plan to the web portal, you can now edit the e-mail that gets sent with it before it is transmitted. In the previous version you could not edit the e-mail.	Open the treatment plan and press the “Capture Signature via Web Portal” button. The e-mail being sent with the link will be displayed for editing before you press “Send” on the e-mail.	

NHS Updates

4.3.4

Description	How To Use	Example

Major update to triage functionality. See “New Features” above.		

Financial Updates

4.3.4

Description	How To Use	Example
New online payment gateway allows invoices to be paid online and monitored.	Once it’s set up, sending an invoice to gateway is as simple as pressing a “Send invoice to Payment Gateway” button on the invoice. See above “New Features” for details.	

Report Updates

4.3.4

Description	How To Use	Example
Patient Next Open Treatment report. Similar to the “Patients with open Courses” report, but this shows the next treatment that the patient is due in for, not just the fact that the course is open.	Go to “Reports” and select the “Patient” tab. Run the report from there.	
Triage Outcomes report. Gives a breakdown of the triage outcomes in both chart and report form.	Go to “Reports” and select the “Patient” tab. Run the report from there.	

Bug Fixes

4.3.4

Record	Description	Status
4.3.4.1	Earnings by provider report doesn't show patient names.	Fixed
4.3.4.2	Outstanding Courses of Treatment report shows failed treatments.	Fixed
4.3.4.3	Miscalculation on treatment option pricing when staged treatments are set to quantity pricing structure.	Fixed
4.3.4.4	Tasks can appear to freeze program if they appear on top of a modal form.	Fixed

4.3.4.5	Although you can update the base chart for whole tooth graphics, it’s not possible to update treatments that use the surface graphic.	Fixed
4.3.4.6	If you delete all the courses and appointments from the charting tab and then press "Add Appt" when there's no course created you get an error 91.	Fixed
4.3.4.7	When appointment status is updated by a received sms message, the appointment status is not shown on other pc's on the network.	Fixed
4.3.4.8	Expiry date for consent is not updated correctly when patients enters details using online web portal.	Fixed
4.3.4.9	If you set a treatment as General, and also set up stages, and also set it to be a quantity item it does not calculate the price correctly when the quantity is greater than 1.	Fixed

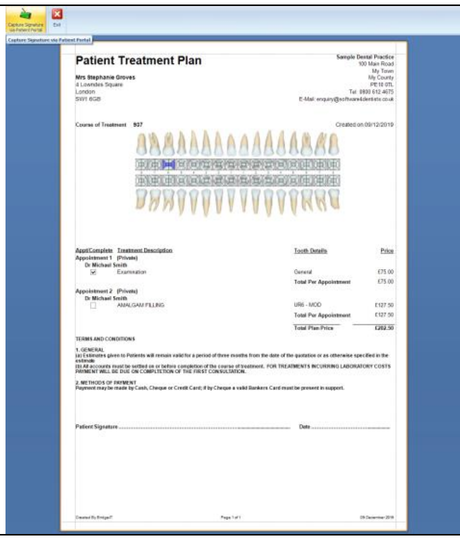
Existing Functionality You May Not Yet Be Taking Advantage Of

Online Web Forms

This new feature allows you to send your medical history form or any documents requiring a signature to a bespoke web portal that can be customised with your own practice logo and welcome message. The patient will receive an e-mail which will grant them access to those documents so they can fill in details at their leisure either on their home computer or any mobile device.

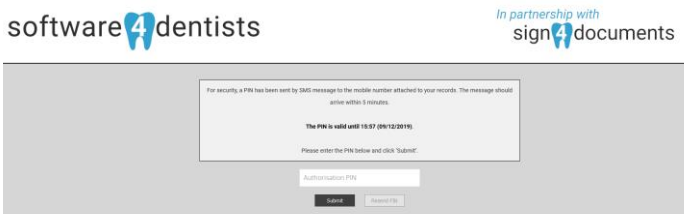
How does it work?

Here are some steps to demonstrate how online web signing works.

Step 1 You create your document in the normal way. In the illustration on the right we’ve created a Treatment Plan. However you can request the patient sign or fill in any of the following online: • PR Form • Treatment Plan • Medical History • Any letter template created within V5 At the top of the screen is a button that allows you to send the document to the web portal.	
Step 2 An e-mail is sent to the patient requesting that they click the web portal link so they can access their documents. Of course this e-mail can be customised with your own logo and wording within the software.	

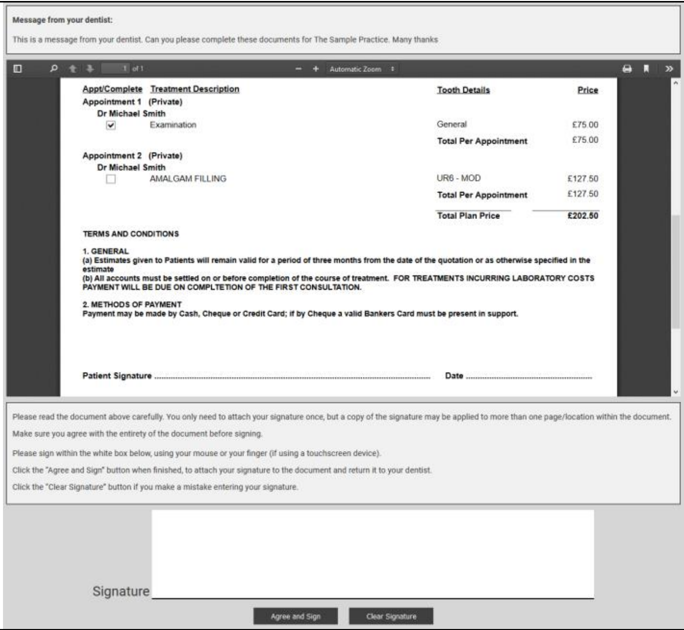
Step 3

Once the patient clicks on the link they will be taken to the web portal where a further security check will be performed. A text will be sent to the patient's phone with an authentication code which they must enter to access their documents. Again this portal can be configured with your practice logo within the software.



Step 4

The documents you have sent to the patient will be displayed and they can sign either using their mouse or more likely their mobile device on the screen. Once the document is signed they can either print it themselves or download it as a PDF file.



Step 5

The signed document is uploaded back to the V5 software and can be instantly viewed by going to the "Documents" tab in the patient record.

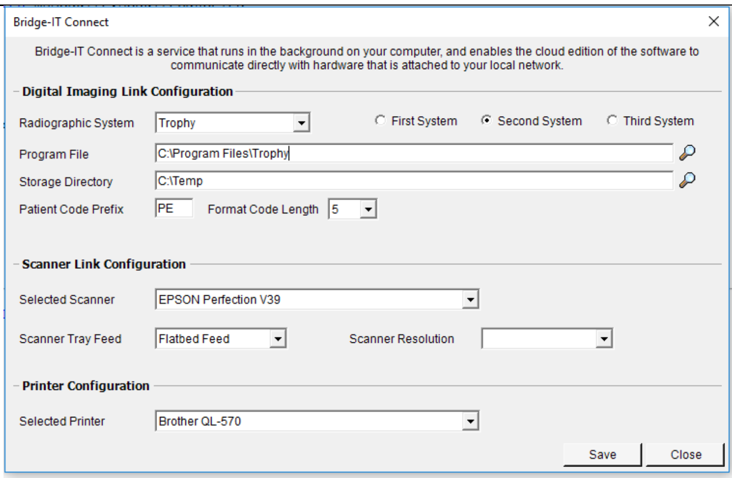
V5 Connect for Cloud Edition

It is now possible to connect hardware installed locally on your own computers to V5 running in the cloud using our new V5 Connect software. This program runs silently in the background and is able to link your hardware automatically including:

- Your digital x-ray system so you can link to radiography from the patient record.

- Your scanner so you can scan directly into the patient record instead of manually uploading scans.
- Your local appointment confirmation printer.

This feature can be made available to any customer on the cloud edition free of charge.



Online Patient Booking

As you know, customers want to do everything online these days so please take advantage of our cloud based patient booking system which is successfully being used by our customers today.

<u>What are the benefits of the Online Booking System?</u>

Patient Convenience - Patients can log onto the mydentalbooking.co.uk site from the comfort of their home or on their mobile device and book an appointment with their preferred dental provider.

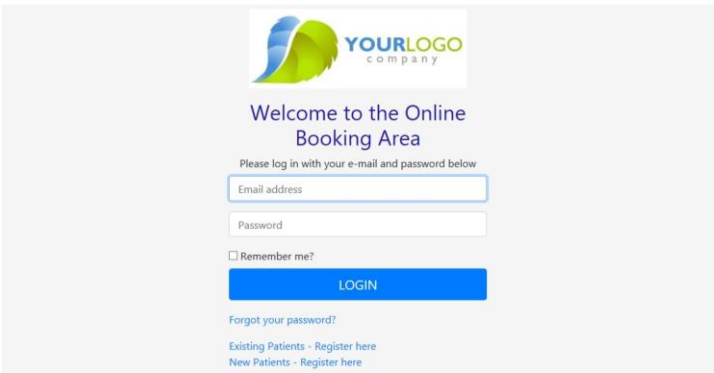
Profitable - Minimize the amount of provider downtime by having all their free appointment slots available for booking online.

Personalised Booking Site - Very configurable site that will display your own practice logo, your own welcome message etc, so your patients will feel like the booking system is an integral part of <u>your</u> practice.

Informative - Patients can view their online booking activity at any time and can easily see when their next appointments are due as well as a history of their previous appointments.

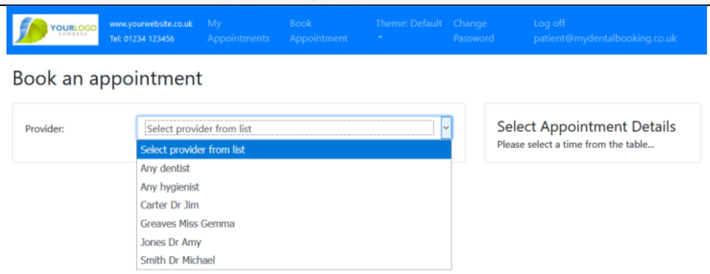
Step 1

On your web site create a button that says something like “To book an appointment click here”. That takes the patient to the online booking system which can be made to look like your own site using your own practice logo and welcome message. The patient logs in using their own e-mail address.



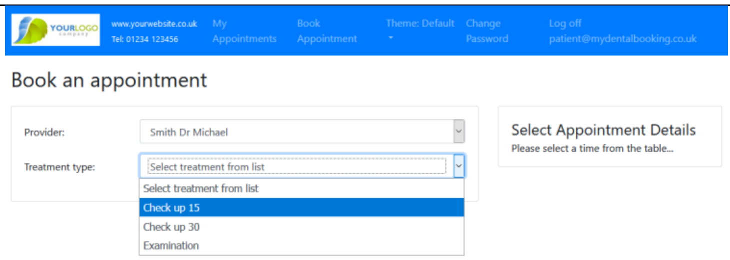
Step 2

The patient chooses which provider they would like to see. In V5 you can configure which providers may appear in this list.



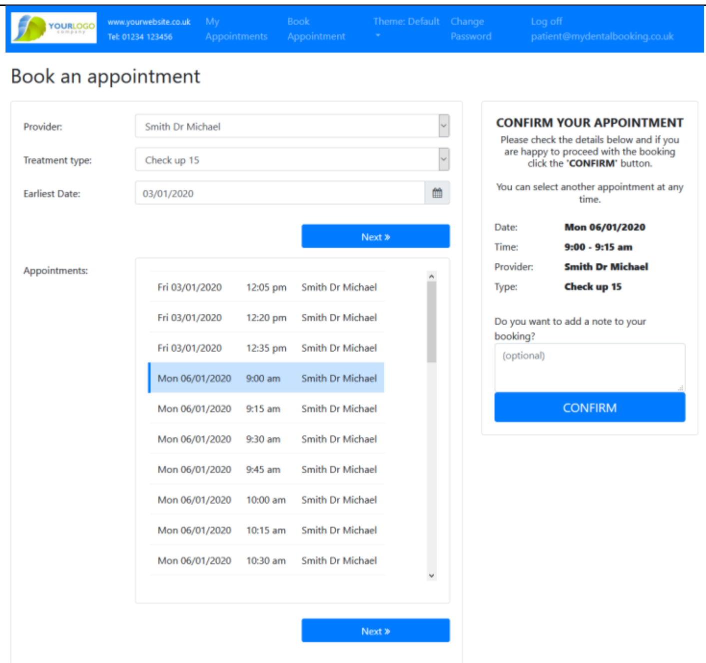
Step 3

The patient selects which treatment they would like to come in for. Again you can configure in V5 which treatment categories are available for online booking and how long the appointment should be.



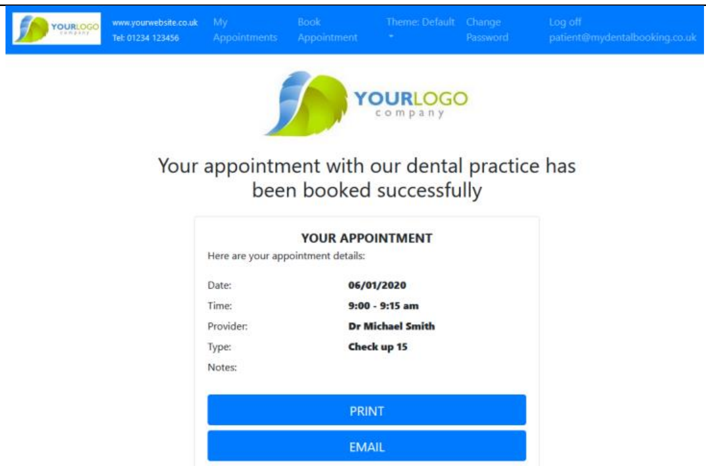
Step 4

The patient is presented with a list of available appointments and they choose the time that most suits them. The appointment slots listed mirror the available time slots in your V5 diary at the practice.



Step 5

The appointment is booked and the patient can either print or e-mail their confirmation. They can also view their appointment history on their home screen if they log in and want to check their appointment details.



Step 6

In V5, the receptionist can quickly review any appointments that have been booked online and then tick them to either accept the booking or reject the booking. In either case a SMS text or e-mail is sent to the patient informing them of this.

Integrated Card Payments

Remember we have integrated V5 with the Payment Sense portal to make taking card payments incredibly simple and seamless.

What are the advantages of using a payment system directly integrated with V5?

Save Time - Instead of entering payment details twice, once into the software and then again into a card machine, the data need only be entered once into V5 which then seamlessly transfers the payment to the PDQ.

Prevent Errors - How often have you had to compare the daily payments recorded in your software with the amounts entered onto the card machine? The Connect interface prevents human error, so the amount entered into V5 will always be the same as the payment you take.

I'm already with a payment provider. What are the advantages of switching to PaymentSense?

Save Money - PaymentSense will always try to beat or match your current rates and are able to do so for 4 out of 5 customers saving on average of 30 - 40% compared to their current provider.

How easy will it be to switch to using the integrated system between V5 and PaymentSense?

It's Simple. If you are already tied into a contract with your current provider PaymentSense will buy out your current contract up to a value of £3,000 (which basically covers almost every contract).

PaymentSense can have you up and running within 3-5 days of application approval (other competitors may take between 4-6 weeks).

If a PDQ ever fails a replacement is sent on the next working day.

That concludes the latest round up of changes. Please contact us to take advantage of features you have been missing out on.

V5 Development Team
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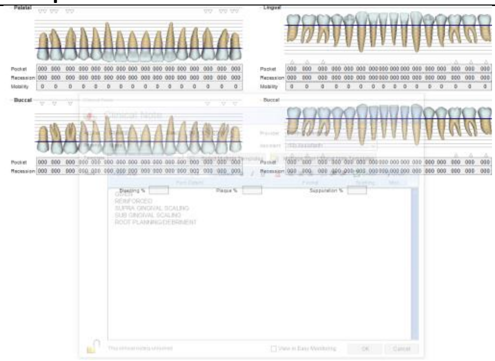
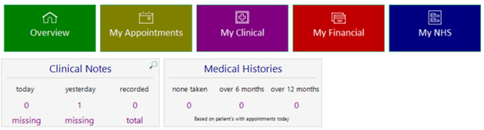
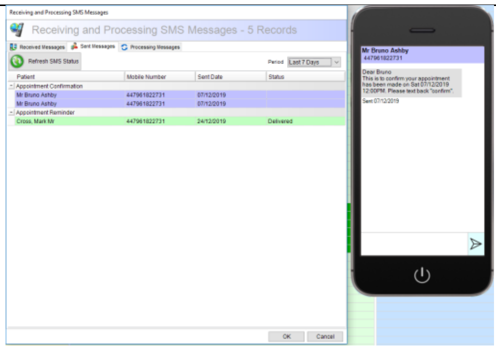
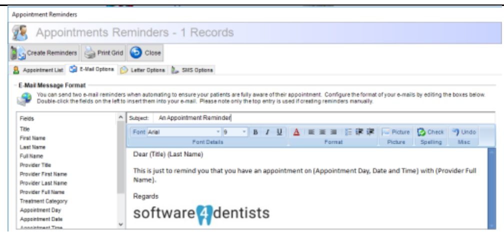
A Reminder of Bug Fixes and Updates for Version 4.3.3 (current version)

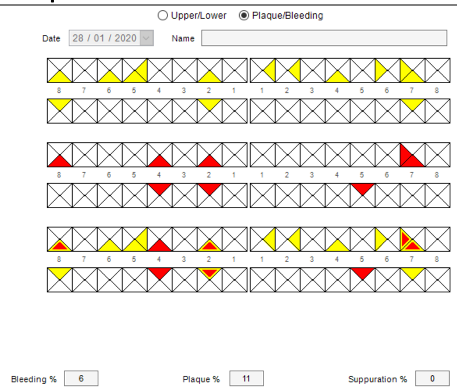
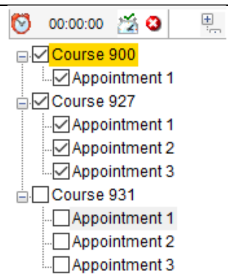
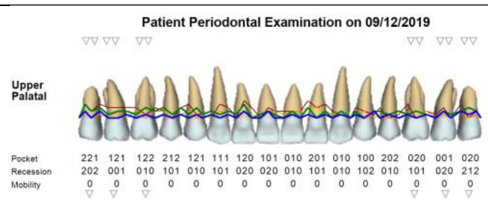
General Updates

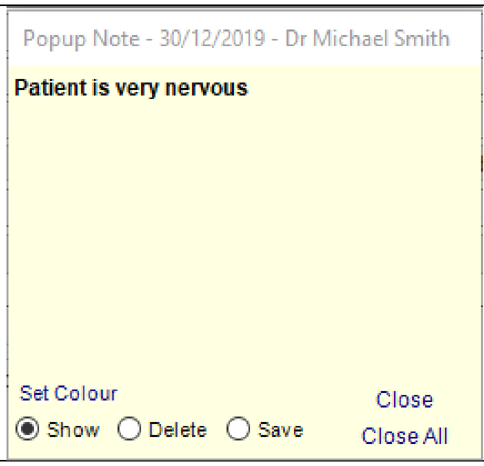
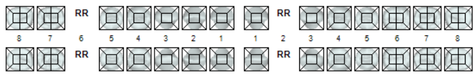
4.3.3

Description	How To Use	Example
Occasionally it is necessary for a dentist to view other parts of the patient record whilst in the middle of creating a clinical note. This meant closing the note, going to a different tab and then editing the note again to continue. Now the clinical note editor not shown modally so you can click off the note to other areas of the patient record whilst it is still open. The note will fade on the screen whilst it does not have the focus. Multiple notes can also be opened at same time. Returning to the note to give it focus will automatically make it tangible again.	With a clinical note open try selecting a different tab, such as the perio chart behind the note.	
When the dashboard was introduced in version 4.3.2 it was no longer possible to see the individuals who had no clinical note made on their visit. This has been rectified in version 4.3.3.	Select “My Clinical” on the dashboard and press the magnifying glass which appears next to the “Clinical Notes” widget.	
You can now check the delivery status of all your SMS messages to see whether the patient has received the message or not. This is useful for identifying wrong numbers within your system.	Select “Appointment Diary” or “SMS” from the menu at the top of the screen and then select “View and Process SMS Messages”. On the “Sent Messages” tab you will see all the texts that have been sent over a selected period. If you press the “Refresh Status” button the software will update the status of every message sent. This can take a while as it has to check each message individually.	
The e-mail image format stored within an e-mail template (for example for appointment reminders)	Automatic whenever you embed an image such as a practice logo in an e-mail.	

has been changed from Base64 to embedded links to make images more compatible with a larger number of e-mail clients. Sometimes if the patient is using a web client such as gmail, images are shown as a series of numbers and letters instead of an image, although other mail clients such as yahoo or Outlook render the image perfectly. The new method should now work with all mail clients.		
Most in-built forms have been redesigned using DevExpress technology, the same component used in the report designer. This means that documents such as plans, estimates, options, invoices, receipts, statements etc can be edited using the report designer to make cosmetic alterations (for example adding a practice logo, changing the font used on a form etc).	This feature is best used under the oversight of Software 4 Dentists. If you want to make any changes please contact us and we'll assist you.	

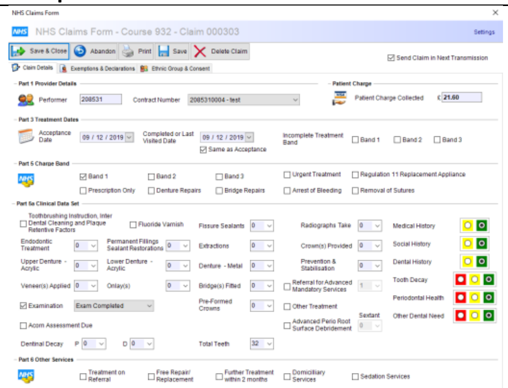
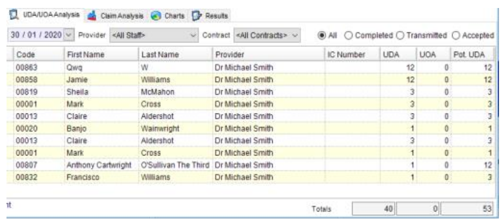
4.3.3

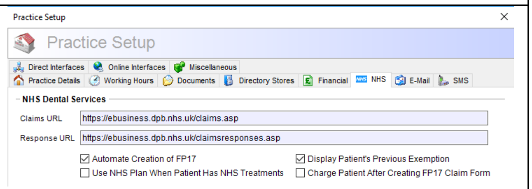
Description	How To Use	Example
New facility for recording plaque and bleeding in the 6 point perio chart. The old method still works (i.e. pressing the B and P keys on the chart), however this new function allows you to separate out the plaque and bleeding and overrides the existing functionality when used.	Open a patient record and visit the "Perio" tab. When you add a new 6-point perio chart you'll see an extra option for recording plaque and bleeding. Select this and then click the relevant surfaces on the first two charts. When printing both the current and previous plaque and bleeding scores will be shown for comparison.	
If you delete an appointment in a course, the other appointments will automatically rename themselves to follow on from the previous one. This prevents a course with "Appointment 1" and then "Appointment 3" because "Appointment 2" was deleted.	Automatic when you delete an appointment from a course. Please note, only appointments that have not been manually renamed will be changed.	
When you print a patient's 6 point perio chart, the values for the previous chart are also shown for recession and pocket depth in red and orange so that a comparison can be made.	Automatic when you print a 6 point perio chart.	

Appointment history groups events relating to a single appointment making it easier to separate appointments and what has happened to them in the grid view.	Automatic when you view the appointment history in a patient record.	
Pop up notes now show a “Close All” option, so instead of laboriously closing one at a time you can instantly close all notes. Also if you have pop up notes open and you perform an action such as creating a plan or charging the patient for treatments, the pop up notes will automatically hide themselves to prevent them being on top of dialogues.	“Close All” option will automatically appear on each pop up note.	
For practices with smaller screens that do not view the tooth roots in the charting area, if a retained root is charted a small RR graphic will appear on the tooth crown.	Automatic when charting a retained root.	

NHS Updates

4.3.3

Description	How To Use	Example
Full implementation of Welsh FP17 claim form.	Automatic if your NHS region is set to “Wales” under “File/Practice Setup”.	
Rather than only showing actual UDA values according to the current UDA of a claim, potential UDA values are now also calculated based on the treatments in the course that may not yet be completed. So if you have a course that consists of an exam and a filling, and you complete the exam but not the filling, although only a band 1 UDA 1 is currently done, the program will also show a potential UDA value of 3.	Automatic when the software creates an FP17 claim form. To view potential UDA’s go to “NHS/Claims” in the menu, then click on UDA analysis. There is a new Pot. UDA column and total. **<u>Please note</u>**: ONLY claims created AFTER the upgrade will show the potential UDA value as it’s only after the upgrade that it’s	

	performing this calculation when a claim is created.	
The program will normally notify you of the patient's previous exemption and ask if you would like to use the same exemption for the latest course of treatment. If you do not want the program to check the previous exemption you can turn it off.	Go to "File/Practice Setup" from the menu at the top of the screen and select the "NHS" tab. Untick the box "Display Patient's Previous Exemption".	
The NHS treatment plan has been updated to reflect the terms and conditions in the latest FP17DC form.	Automatic if you use the NHS treatment plan for NHS treatments which is built into the system.	

Bug Fixes

4.3.3

Record	Description	Status
4.3.3.1	When you press UNDO in charting as an NHS practice you can no longer add an appointment to a course unless you exit the patient record and go back in again.	Fixed
4.3.3.2	If "Access Patient Contact Details" is removed from a user's security group an error occurs when the patient record is opened.	Fixed
4.3.3.3	On the NHS claim form, the clinical dataset is recording the number of dentures created rather than the number of teeth the denture applies to.	Fixed
4.3.3.4	The green notification tags in the appointment diary can sometimes overlap other tags and position incorrectly, occasionally even covering the ability to select menu options from the navigation panel.	Fixed
4.3.3.5	When you add a drop down control to a medical history in the designer, after you add entries to the control and save the format the entries disappear. It only works if you re-edit the form and add the entries a second time.	Fixed
4.3.3.6	If you make an appointment longer in the diary by dragging the bottom border of an appointment, it records the appointment as being moved in the patient record.	Fixed
4.3.3.7	The tooth tooltips that appear when you hover over a tooth in the Treatment Options chart show treatments across all options rather than just the currently highlighted option.	Fixed
4.3.3.8	The re-check outstanding invoices does not pick up on all outstanding figures where the number decimals on the figure exceeds two.	Fixed