# VERSION 4.6 ENHANCEMENTS

# INDEX

INTRODUCTION	5
CHANGES IN SETTINGS	6
ALERTS	8
PATIENT INSURANCE	11
PENNY ROUNDING FOR CASH TRANSACTIONS	13
UPDATE FEES ON PLANNED TREATMENT	17
RECEIPT	17
APPOINTMENT BOOK	18
OFFICE COMMUNICATOR	22
ADDITIONAL FEATURES	24
FEE CATEGORY REPORT	26
PATIENT INSURANCE LIMITS REPORT	28
ENHANCED SUMMARY REPORT	30
PROCEDURE ANALYSIS REPORT	31
MONTHLY DEPOSIT SUMMARY	32
TOP REVENUE ACCOUNTS	33
HYGIENE BILLING	34
OTHER ENHANCEMENTS	36

CHART	38
SET UP	40
ODONTOGRAM	45
PRE-EXISTING CODES	47
PERIODONTICS	48
PATIENT ALERTS FOR CHART	49
TREATMENT PROPOSALS	50
PROPOSAL STATUSES	52
PROPOSAL OPTIONS	53
POSTING MULTIPLE RESTORATIVE PROCEDURES	54
COMMENTS SEARCH	55

#### **INTRODUCTION**

Power Practice Px has a brand new look. This User Manual introduces the new features and enhancements in Power Practice Px Version 4.6. In addition to a description of the general overall changes in each of the areas, you will find a "How To" section for the new features.



#### **CHANGES IN SETTINGS**

There are added features in the Options of Version 4.6.

Each module can change to your current patient, called *Single Patient Mode*. For example: if you change patients in the scheduler, the Patient File, Transactions or other patient specific modules already open in the Tasks bar will automatically change to that patient as well.

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This is set by clicking on **Options** (Menu or Icon) and choosing **User Settings**.





Put a check mark in

- 1. Single-Patient Mode.
- 2. Click Save.

To have specific modules open up when you start Power Practice Px; go to *Options* and choose *Startup...* or click the keys icon if you have it on your task bar.



- 1. In the *Startup Options* screen choose *Start Default Tasks*.
- 2. Under Module choose the screens you want to open when you log into Power Practice Px.
- 3. Click the Save button.

#### **Other Startup Options**

*Restore Previous Session* will restore the modules you had open when you last logged out of Power Practice Px.

*Save Window Position and Size* will reopen modules to the same size they were when you closed out. Choosing both *Restore Previous Session* and *Save Window Position and Size* will restore your last modules in exactly the same spot and size they were when you logged out of Power Practice Px. **Note:** In Windows, if one of the windows is maximized upon shut down, then when the program opens all windows will open in the maximized format. Above features apply if windows chosen are specifically sized.

# **ALERTS**

There is a new interactive report listing the alerts attached to patients in Power Practice Px as well as the Charting (if you have it).

- 1. In Patient File, Click on *Patient Reports*.
- 2. Select *Patient Alerts* and click OK.

Make the appropriate criteria selections and click Generate.

3. Right click on a patient in the list to bring up a menu with other options.

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To set a priority for an alert that will allow different levels to be displayed.

- 1. Click on *Maintenance Manager* icon, then click on the Patient tab.
- 2. Double-click on Patient Alert Codes.
- 3. The drop down beside *Priority* can be set for each alert.



In the *Scheduler* you can choose the priority level for the Medical Alert Pop-up.

- 1. Click on the *Scheduler* icon.
- 2. Click on Scheduler Options (the icon with the pencil).
- 3. Click on the *Settings* button.
- 4. At the bottom of the screen is the *Patient Alert Display*. Choose the priority level for the pop-ups you want to see. For instance, choosing Low Priority will display any Alerts set to Low Priority and above.

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When booking an appointment for a patient, a *Medical Alerts* box will pop up with the Alerts for that patient in different colours. A High Priority will be **red**, Low will be **blue**, and Normal will be **black**.



#### **PATIENT INSURANCE**

Two new columns have been added in the *Insurance tab*. Both areas are populated from the information entered in the *Patient Personal* tab.

- 1. On the policy list, there is a new column to display the policy holder's birth date.
- 2. In the dependents list there is a new column to indicate the patient status.

Additionally,

3. In *Patient Reports the Patient Information* report will now include any insurance comments attached to that patient's policy.

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# **INSURANCE PAYMENT TAB**

There is a new button option in the *Insurance Payment* and *Bulk Insurance* Tabs.

1. *Ins Details* allows you to quickly reference the selected patient's insurance details.

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# PENNY ROUNDING FOR CASH TRANSACTIONS

Power Practice can be set to handle rounding of cash payments now that the penny has been discontinued.

To activate this feature if you choose to use it, go into

- 1. *Maintenance* to the *Office* tab and double click on *Payment Codes*.
- 2. Highlight the Cash line and tick the box that says Allow Rounding?. Click the Blue Check to save it.

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PLEASE NOTE: If you have not already created codes for this that you are using manually, you will need to add 2 adjustments to Power Practice Px to be able to use this feature.

#### SETTING UP ADJUSTMENT CODES FOR PENNY ROUNDING

If you do not already have adjustment codes that you use for the Penny Rounding,

- 1. Go into Maintenance,
- 2. Go to the *Office* tab and double-click on *Adjustment Code*.



You will need to add 2 Adjustment Codes, one for Penny Round Down and one for Penny Round Up. To do this:

#### PENNY ROUND DOWN

- 1. Click on the Green Plus to add a new code.
- Fill in the Code, Description and Print Desc. We suggest using PRD for Penny Round Down.
- 3. Set Adj Type to Credit(-)
- 4. Click the **Blue Check** to save.



#### PENNY ROUND UP

- 5. Click on the Green Plus to add a new code.
- Fill in the *Code, Description* and *Print Desc*. We suggest using PRU for Penny Round Up.
- 7. Set Adj Type to Debit(+)
- 8. Click the **Blue Check** to save.

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- 1. Once these have been added to the system, go into *Transactions* to the *Wrench*.
- 2. Choose the *Rounding* tab.
- 3. Set your *Method*.
- 4. Set the *Round Up* and *Round Down* Codes that you've just created in Maintenance or that you are currently using.

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5. Choose the *Rounding Confirmation* your office wants. *Always Ask before Rounding* will pop up a confirmation box with each step asking if you want to continue. There is a final confirmation box with this option, showing you your choices and asking you to choose an option to continue.



*Show Rounding Results and Continue* will show you the results with just an OK button.

Both of these options will then pop up with an Allocations box to apply the adjustment and a Payment Apply box to apply the payment.

*Never Ask(Automatically Round)* will put the proper amount into the Amount box on the Patient Payment tab. It will then pop up with the Adjustment Allocations box and the Payment Allocations box.

*Always Ask before Adjusting* will pop up a box with an OK option.



 Choose the Adjustment Confirmation your office wants. Show Adjustment Results and Continue will show a pop up saying how much will be applied as an adjustment.

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?	Payment An Adjus SELECT: Yes No Cancel	Amount: \$10.38 has beeen Rounded TO: \$10.40, tment (PRU) of \$0.02 will be applied. Continue with Adjustment and Payment Add Payment Only Return to Payments Screen	
		Yes No Cancel	

*Proceed Directly to Adjustment Screen* will take you directly to the Adjustment Allocations with the amount to be applied.

7. *Default Rounding Amount to Total Owing* will go to the Adjustment Allocations box and the adjusted amount will be on the total amount owing on an account.

# **UPDATE FEES ON PLANNED TREATMENT**

On the right-click menu option in Planned Treatments is an *Update Fees* option. You can update the fees on the claim to match the Dr's current fees. Once chosen, you will be prompted to confirm your choice.

You can also find this on the right click menu of the *Interactive Treatment Status Report*.



#### RECEIPT

You now have the ability to email the receipt to the patient providing that patient has an email address on their patient file.

Receipt Printout - George R.	×
Receipt Printout - George R.         Print receipt for the date period :         From :       08/09/2012         To :       08/09/2012         Print practice name?       or         Do you wish to include payments only?         Do you wish to include future appointments?       Copies :         Use new layout?         Email Receipt?         Save to Drafts folder?	Cel efault
Comment1 :	
Comment2 :	

Be sure to choose the option Use new layout? to access the Email Receipt?.

#### **APPOINTMENT BOOK**

You will now be able to view up to 30 chairs in the Appointment User View.

To view a list of digitally stored Appointment Daysheets:

- 1. Click on Print Today's Appointments, choose Digital Copy.
- 2. Click View.

You can highlight the day you want to view and

3. Click *Details*.

Day End Report/Processing		$\mathbf{X}$
Day-end Date 08/07/2012 Day-end Date 08/07/2012 Day-end Creation Create Day-end Report Options For Billing Dr * Print Quick Day-end Separate Day-end Separate Day-end By Producer By Billing Dr. Print Procedure Description Print Tooth/Surface List in Chronological Order Don't Print Deleted Treatments	Additional Reports Report for Selected Dr. Only? Create Producer Summaries Print Producer Analysis Report Include YTD Totals Include Payment Analysis Print Revenue Distribution Report Print Office Reminders Report SAP Integration	
Day-end Processing  Perform Day-end Processing  Purge Appointment History	Number of Copies 1	
Print Today's Appointments 1	Appointment List History	l 🕑
Digital Copy View     Perform A/R Integrity Check 2	Date         Date/Time Created         3           May 11, 2012         Fri May 11 14:29:52 2012         3	Details Close

To book multiple *Planned* appointments without having to reopen the Appointment Detail window:

- 1. From the *Scheduler* screen, go to *Patient Profile*.
- 2. Click the *New* button.

3. Add in your appointment information and click the *Next* button. It will bring you right back to a blank Appointment Detail screen and you can add in your next appointment information.

Appointment Scheduler - BLANK B.			
BLANK B. (0 1 M8 ♥ W32 ♥ D7	Tue Aug 7, 2012 🗸	🥟 🔼 🔜 🥅 📝 🚳	\$0.00
Scheduler     Patient Profile     Appt. Search     Lists       Patient Information     Patient Name:     BLANK BLANK M32       Address:     City/Prov:       Other Contact :	Home #: Work #: Other #: Contact: H Email:	Chart: 000001 Status: Active Patient Dr #: 03 Hyg #: H01 Codes Account Balances Sep10,12 4H Y	More Info Purged Hist. Insurance Recalls Oth Contact
Appointment Detail - DLANK B. Apt. Date 08/07/2012 Chair C01 Time 12:00 AM Prod. H03	Status  Confirmed	Bal:         \$5151.22           OK         Bal:         \$938.00           Bal:         \$6089.22           Cancel         Bal:         \$0.00           Next         rity         New	2
Appt. Code Units Units Type Units O Procedure Notes		Total Edit 0 Delete View By ⊙ Patient Exclude Pas Appointment	Default Family t Booked

To choose different options for the display of patient names both on the *Scheduler* and on the *Daysheet*:

- 1. To set the way a patient's name displays on the scheduler go into *User View Options*.
- 2. Press the drop down arrow and select the display option you want.

🔜 Appointe	ment Scheduler - George R.		1	
George R.	(00001 🗸 M 8 🍦 🗤 31 🌲 D 3 🌲	Fri Aug 3, 2012 🛛 😽 🌈 🔝 📑	1 📅 📝 🗟 /	\$1854.00
Scheduler	Patient Profile Appt. Search Lists			
Time	BLANK	TW0	HYG	
08:00A :10	User's View Options			
20 30 30 50	# Months/days ahead (from today's date)         Aug 9, 2012         0       Months         0       Days         Preset View         All         O       Days         Producers         D01       BLANK, Inc         D02       Tw0         D04       Inactive         H01       HYG         H03       Hyg Billing	<ul> <li>Book by Pat's Dr.</li> <li>Use Rcl. Date if Recall</li> <li>Show MCB Columns</li> <li>Show Location Color (By Chair)</li> <li>Initials Only</li> <li>By Doc</li> <li>By Doc</li> <li>Trist First Ast First First Only Last Only</li> <li>Last, First First Only</li> <li>Last Only</li> <li>C 2 Tw0</li> <li>C 3 HYG</li> <li>C 22 Title</li> </ul>	OK Cancel	
	Daily View         Chair Cols/Page         Show Dr/Asst Time         Image: Disable Auto Refresh         Auto Refresh Time         Minutes         Image: Highlight Current Time	Weekly View Days/Page 5 S M T W T F S I V V V V V View Pat's Initials		

To choose the way you want the patient names to print out on the Daysheet :

Go to *Appt DaySheet* either by right-clicking on a blank spot on the scheduler to bring up a menu and choosing *Appt Daysheet Printout* or

1. Click on *Scheduler Reports & Utilities*.

2. Choose *Appt DaySheet*.

3. Press the drop down arrow and select the display option on the printout that you want.

2 🖨 D 7 🖨 <b>Tue Au</b>	g 7, 2012	<u> </u>	p 🔊 🛤		1	<b>2</b>
Scheduler Reports & Utili	TW(	)			HYG	
Reports       Utilities         Appt Report       A         Appt DaySheet       A         Confirmation List       A         Appt Verification       A         Appt Reminder       Patient Labels         Appt Backup Listing       A	ppointment Report ppointment Day Sł ppointment Confirm Appointment Confirm Date Range Fro Time Range Fro Time Range Fro Print Patient I Print Chair Es Print Run Da Print Thin Lin Print Indicato Print Indicato Print Bold Foo Page Orientatior Portrait	neet 2 nation List ay Sheets m 08/07/201 m 08:00 AM Doctor stimate(s) te nes rs nt	2 ▼ To 08/07/2 To 05:00 PP Lines Per Unit Cols Per Page ● By Chair Standard Display First Last Last, First First Only Chart Number On Initials Only	012 V 1 C By Doctor	OK Cancel Default	3
	Order           01                       Select Info to Di           Order           01           02           03	Chair # 01 02 03 22 splay Patien Appoir Appoir Chart : Chart :	Description BLANK TWO HYG Title	Sort/Select		

#### **OFFICE COMMUNICATOR**

Pre-set messages can now be created for the Office Communicator.

- 1. In *Maintenance* go to the *Office* tab.
- 2. Double Click on *Comment Codes*.



The Office Communicator can now also open as a pop-up window that can be resized and moved around your screen.

To set this up go to *Office* then *Office Communicator* and click on the *Options* button. Put a tick in *Use Popup Window For ALL message types?* 

H V H Mat	he MacDonald - (HDT)	
H		
E I		
H 1		
H V H Saly	Andrews - (H01)	
H 1 B 1		
8.1		
H Kall	teKay (H01)	
HV		
H Over	Inne McKay- (H01)	
H Red	whe Williams - 1921	
B I H I		
H 1 H 1		🖓 New Communicator Messages (ex 🍝 🔍 🎫
H. V		Time From Message
Jos Num Care		
The Prove Course		11/8.444

There is a right click menu in the new Communicator window that will take you to those specific settings.

Go To: New Message take you to a New Message screen.

*Options...* will take you to the basic Communicator Options Screen.

<b>م</b> (	lew Commu	nicator Messages (exan) 🛛 🗖 🗙
Time	From	Message
Settings	Options	Go To: New Message
History	Delete	Print Reply

*Settings...* is where you choose what message types you want to see, what columns you want to see and if you want to Show or Hide Buttons. Hide Buttons will take them off the bottom of the Communicator screen when it is in Pop-up mode.

Office Communicator Set	tings ×
Colour Lines by	OK
<ul> <li>Message Type</li> </ul>	
<ul> <li>Message Priority</li> </ul>	Close
Columns to Display	
✔ Date ✔ User	
Description Type	
Show Message Types	
Checkout Appt. Status	
✓ Proposals ✓ General	
✓ Hide Buttons	
Do not Display Automatically	

#### **ADDITIONAL FEATURES**

In the majority of the *Patient File, Transactions* and *Charting* tabs you will now have the ability to right click and select *View Appointments*.



This will open the following appointment list for the selected patient where you will have the ability to print list, add, edit, modify appointments and print or email appointment reminders.

Status	Name	Date	Time		)r	Chair	Units	Appt Type	Priority	New
В	Jane	Jul12,12	10:40A	H	401	C03	2	Н		
Р	Jane	Jul12,12		0	001	C01	2	E		E dù
В	Jane	Jul17,12	09:50A	0	001	C01	4	F		Euk
В	Jane	Jul30,12	09:50A	0	002	C02	5			
В	Jane	Aug1,12	10:20A	0	001	C01	2	E		Delete
R	Jane	Feb3,13		0	001		0	6K		
				9	Appt	Reminder				Exclude Past Book
				Ъ	<u>E</u> mail	Reminder	r			
					Print	List				
					Expo	rt List to B	Excel			

Right click on an appointment in the list to access a menu that will allow you to email your patient a reminder of their upcoming appointment.

There is a new *Held Payment* default option accessible through *Transactions*.

1. Go to **Options/Settings**.

2. Choose the *Defaults Tab* and you now have the ability to choose a default Held Doctor.

You have 3 options:

a. *Resp. Patient's Doctor* – Will automatically place held payments under the selected patients default Dr. (Patient Files/Personal Tab).

b. *Default Dr.* – Gives you the ability to select one doctor to have all payments default to when going into held.

c. *No Default* – blank entry, will bring up the current box so you can select who it should be held for.

General - Jane J. [Claim Ledger]			
Jane J. (000010)	🛯 🚨 🚲 찉 📁	) 📂 🗎 🗮 🥩	<b>S</b> 🔧
Name : Jane Jones P-Note : A-Note : Date Ledger Claim Ledger Claim by Patient	Family Open D Last Statemen Last Interest : Family Last Vis Last Payment : reatment History	iate : May 08, 2012 t : May 11, 2012 iit : May 10, 2012 : Aug 08, 2012	180.50 722.00 350.00
	Display Options Defaults Settin Transaction Defaults Ledger Views Default View : Claim Ledger Display Treatments' Descripti Show Ledger Notes	ngs Ortho Plan	Save Close
	Show Offsetting Adjustments Default Fee Schd: R Lab Code: 99111 Default Clm Sts: C	in Ledger	
	Apply Patient : Claim Apply Insurance : Claim Go to Payments : No Doctor/Hyg Defaults Billing Dr. Selection : Patier	v v nčs Dr v	
	Default Billing Dr : Held Dr. Selection : Resp. Default Held Dr :	Patient's Dr  2	
	Default Hyg Selection : Patier	nt's Hyg	

#### **FEE CATEGORY REPORT**

In *Reports Manager* there is a new *Fee Categories Report* that allows you to run a report on specific procedure codes or office codes by attaching certain categories to the codes.

Before you attempt to run this report, you will need to set up the Fee Category Codes and then attach these codes to the specific procedure(s).

- 1. In *Maintenance*, go to the *Insurance* Tab.
- 2. Double Click on *Fee Category Codes*.
- 3. Create the code by clicking on the green plus.



#### Categories can

be linked to either selected Procedure Codes or Office Charge Codes.

1. In *Maintenance*, go to either the *Insurance* Tab for Procedure Codes or the *Office* Tab for Office Charge Codes. Search for the code and select it.

 In the Edit Procedure Code/Office Code dialogue window, *select the code*.
 Select the *Fee Category Code* from the drop down and save with the blue check.



#### To create the Fee Category Report

Go to the *Report Manager* and select the *Fee Categories Report*. Select your report criteria and either preview or print the report.



#### PATIENT LIMITS INSURANCE REPORT

In the *Patient File* under *Patient Reports* is a Patient Insurance Limits report. This interactive report will show insurance information on the patient such as their limit reset dates and their remaining balances.



To generate this report, choose your options. You can choose a specific Dr, Patient Status, Insurance Company, Group number and Reset date range. Once you've made your choices, click the Generate button.

					Patie	nt Insurance Limi	ts Report			- • ×
Search Criteria										
							Heset Dat	Generate		
Default Dr :	~	Patients Only? Ins :		Start :	Start :					
		_								Save Defaults
Pat Status :	~	Cove	red?	Group			End:	~		
										Chara
										Liose
Name	Sts	Pat	Cvg	Relation	Ins	Employer	Group	Limit Type	Remaining Limit	Reset Date
Andrews, Sally	Α	Y	Y	Self	GWL	Tim Horton's	125515	Patient Limit (12 Months)	\$ 875.50	Dec 31, 2013
Brown, Samantha	A	Y	Y	Self	MANU	Starbucks Coffee	2525	Patient Limit (12 Months)	\$ 2425.00	Dec 31, 2013
Brown, Samantha	A	Y	Y	Spouse	GWL	ABC Automotive	49537	Category B (12 Months)	\$ 1432.50	Dec 31, 2014
								Category M (12 Months)	\$ 724.80	Dec 31, 2014
Brown, Tyler	A	Y	Y	Spouse	MANU	Starbucks Coffee	2525	Patient Limit (12 Months)	\$ 3000.00	Dec 01, 2013
Brown, Tyler	A	Y	Y	Self	GWL	ABC Automotive	49537	Category B (12 Months)	\$ 1240.50	Dec 31, 2013
								Category M (12 Months)	\$ 1000.00	Dec 31, 2013
Campbell, Jennifer	A	Y	Y	Self	PBC	School District #42	0101	Patient Limit (12 Months)	\$ 1500.00	Apr 02, 2014
Davies, Jeanette	A	Y	Y	Self	CAL	Rona	6254	Category B (12 Months)	\$ 1000.00	May 01, 2014
								Category M (12 Months)	\$ 500.00	May 01, 2014
Green, Travis	A	Y	Y	Other	PBC	School District #42	0101	Patient Limit (12 Months)	\$ 1351.21	Apr 02, 2014
Kelly, Lisa	A	Y	Y	Other	GWL	Lexus Canada	1248	Patient Limit (12 Months)	\$ 952.32	May 30, 2014
Kelly, Mike	A	Y	Y	Self	GWL	Lexus Canada	1248	Patient Limit (12 Months)	\$ 1500.00	May 30, 2014
Williams, Gary	Α	Y	Y	Self	GWL	GE Canada Inc	1258	Patient Limit (12 Months)	\$ 3000.00	Apr 30, 2014
Williams, Rochelle	A	Y	Y	Other	GWL	GE Canada Inc	1258	Patient Limit (12 Months)	\$ 3000.00	Apr 30, 2014
									Select Patient	Clear
									Solost F duorit	Cicdi

Update... Change Limit Start Date... Ins. Details View Appointment List Notes... Print List

Export List to Excel

Right Click on a patient in the list to access a menu.

*Update...*This will pull up the selected patient's Dependent Limits box.

*Change Limit Start Date*...You can highlight a group of people or just one person and change the Limit Start Date.

*Ins. Details* - This will bring up the selected patient's Insurance Details.

*View Appointment List* – This will bring up the selected patient's Appointment List.

*Notes...* This will bring up the selected patient's New Note box.

*Print List* – This will send the list to your printer

*Export List to Excel* – This will export the list to Excel if you have Excel linked to Power Practice Px.

You will now get a warning if you tick or untick the Frequency/Limit based on Calendar Year.



#### **ENHANCED SUMMARY REPORT**

1. Go to Reports Manager.

Double click on Summary Report.

The Summary Report has been adjusted from the Daily Summary Report. You can still get a daily Summary for the producers, but now you can get monthly or yearly totals as well. You choose the date range.



### **PROCEDURE ANALYSIS REPORT**

Two new features on the Procedure Analysis Report are the

- 1. default button. You can set your choices to default for the next time you use the report
- 2. and the option to choose to run the report's YTD(year to date) totals by fiscal or calendar year.



#### MONTHLY DEPOSIT SUMMARY REPORT

- 1. Go to Reports Manager.
- 2. Double click on Monthly Deposit Summary.

Select what you want to view and either preview, print or export to Excel. You can choose your order for Payment Codes or choose to only view specific codes.





# **TOP REVENUE ACCOUNTS**

In *Reports Manager*, under *Billings* is a *Top Revenue Accounts* Report.

You can choose to run it for all doctors or specify an Account Holder's Dr. You can List Top percent of accounts.

Do you want to include In Include Payment Adjustm List All Family Members? You can choose the date r to look at.	Top Revenue Accounts         Image: Construction of the second s	•		
Date: Sep 27, 2013 11:16:12 # Account Holder	Top Rev Date Range : Seg (For Best Contact#	venue Accounts 5 27, 2012 - Sep 27, 2013 All Doctors) Email	Include Pmt Adjustments?         Include Pmt Adjustments?         List Family Members?         Date Range         Start Date       08/31/2011         End Date       08/31/2012	
1 Campbell, Jennifer (PF53) Address: Family Members: 2 Williams, Gary (*M69) Address: Family Members:	(H) (604) 555-5555 Oak Street, Vancouver V2I Green, Travis (*M22) (W) (555) 555-5555, 19 da Lougheed Highway, Coqui Williams, Rochelle (F65)	email@address RT6J nytime email@address tlam J4SD8F	1,460.30 1	
	Displaying 2 of 6 Accoun	ts (Top 20%)	3,675.30 9	-

#### **HYGIENE BILLING**

Power Practice Px now has the ability to use a hygienist for billing claims. When available, a hygienist will also be able to bill claims electronically

**IMPORTANT NOTE**: YOU CANNOT HAVE THE SAME ID FOR A BILLING DOCTOR AND BILLING HYGIENIST. FOR EXAMPLE, YOU CANNOT HAVE A D01 AND H01 BUT YOU CAN HAVE A D01 AND H02.

- 1. Go to Maintenance.
- 2. From the Setup tab, choose Practice Address.

3. Choose *Hygiene Billing* (leave Hygiene EDI unchecked until it becomes available) and click **OK**.



- 1. Choose Producer Codes.
- 2. Either add a new hygienist or highlight one already entered.
- 3. Choose *the Fee Schedule* you want the hygienist to use when charging treatment.
- 4. Add in the hygienist's *billing number* and click the <u>blue check</u> to save the record.

1		Maintena	ance		
🥘 Setup 🥘	<u>Offi</u> ce 🍯 Pati	ent 🥥 Insuran	ce 🌙 Utilities		
Practice Address	1 Producer Codes	User Codes	User Group Code	s Printer Settings	
			Producer		×
	Prod. Type Hyg	gienist 🗸 ID. 🕻	Address		
	Last Name Hyg	giene	City		
	First Name Billi	ng	Prov.	✓ Postal	
	Middle Name		4 💾 <sup>6</sup>	Business Phone	
	Title			Home Phone	
3	Eee Schedule B		License# 0101		-B
	Specialist #	EDI:		Color1	
	Specialist #	BAM	" 0#/MSI#	Color?	
		Rilling	Prod # 02		
		Dining	griod # 02		
	Producer L	.ast Name	FirstName	CDA License #	Active
2	D01 S	Smiles	John	1234	<u>Y</u>
		lompson lygiene	sara Billing	0101	Y

This hygienist will now show in all the drop downs in billing doctor fields. When printing a claim form for a billing hygienist it will show a CDHA screen and print a CDHA claim form.

# OTHER ENHANCEMENTS Custom Reports

The patient's email address will now display on a custom report.

May/28/13	Responsible Patients			Page	1
Patient Name	<u>Sex/Age Sts. Dr. Chart No. Alerts</u>	<u>Fam. A/R</u>	<u>Home Ph.</u>	<u>WorkPhone</u>	Cont.
Mrs. Jennifer Campbell	F53 A 01 000022 E-mail: support@exansoftware.com	\$ 1,226.50	(604)555-5555		Н
Mrs. Julie Jones	Comment: very nervous patient F45 A 01 000006 E-mail: info@exansoftware.com	\$ 442.10	(604)555-5555		0

Printing labels is more uniform. The extra space has been removed.

Mrs. Jennifer Campbell 102 1135 Oak Street Vancouver, BC V2R T6J Mrs. Julie Jones 11548 Willow Avenue Toronto, ON T5R D3G

You can now search on blank criteria when using the "Is" or "Is Not" Condition.

		New Repo	rt Maker		×
1. Report Title : Bl	ank Criteria				Close
2. Report Type :	Detailed Report? Recalls Appointments Claims/Treatments Office Charge Payments Adjustments	3. Sort By Order 1 2	Pat. Last Name Pat. Last Name Pat. First Name Pat. Preferred N Pat. Chart Number	Reset Available : Report Merge Letters Labels	Bun
Make the selection(s Select the File, the C 4. File Type Family Patient Recall Appointment Claim/Treatment	of what to search on for riteria, the Condition, and Criteria : Pat. Chart Num Pat. Sear Pat. Birthdate Pat. Birthdate	ame	6. Condition e Is (= Is No Betw 7. Value(s): Help	) it (not =) ie Of (a or b) een (from/to)	
Selections Made :	Edit Mode			New	
File Type Patient	Criteria Pat. Birthdate	Condition Is	Value	Save	

### **NOTES**

The fonts in the Notes areas of Power Practice and Power Chart can be customized for each user. Go into a patient's Note.

- 1. Click on the Font button.
- 2. Choose your font, font style and size.
- 3. When a note is highlighted or edited, you will see it with the font choices you've made.



# CHART

#### **INTRODUCTION**

All Chart Modules are now part of Power Practice Px. This enhancement means various features are now merged to make the Charting aspect of Power Practice Px flow more smoothly.

The Version 4.6 desktop combines the Charting and Practice Management Icons onto one *Tool Bar*. For example you can move from the Scheduler to Perio to the Odontogram to Patient File by clicking on any of the selected icons.

Once Version 4.6 is loaded on each computer, each *Login* will require some set up. This is especially important in the operatories as the ability to move through the charting tasks now incorporates the *Tool Bar*.

#### USER SPECIFIC SET UP: Desktop, User, Start Up



To customize your **Desktop**, click on **Options** and select **Desktop**.

The Tool Bar orientation has a selection of either a *Horizontal* or *Vertical* orientation.

Ele <u>Patient</u> Office Charting Practice <u>O</u>		
Tark         Contractores - learner           Image: Contractores - learner         DB: -1.5 seare:           Image: Contractores - learner         DB: -1.5 seare	Implete         Option         Option         Option         Description           Implete         Imp	Image Status (block         Status (block           60         50

1. Horizontal orientation

#### 2. Vertical orientation



Each user has the ability to create a unique toolbar with their preferred icons for Charting and Power Practice Px.

To customize the toolbar:

- 1. Click on the Setup button.
- 2. Select from *Available Buttons*.
- 3. Choose *Add* to add it into *Current*.

	Options		×	
Desktop Environment Sta Enable/Disable Desktop C I Tool Bar	ation User Chart Settir Options Tool Bar Orientation	ngs Startup Options	Save	×
Dynamic Task Bar Desktop Window Customize Tool Bar Icons Se	Horizontal     Vertical	Available Buttons:	Current: Add >> < <delete Question Update New Patient New Patient New Patient New Patient New Patient New Patient New Patient New Patient New Patient New Patient</delete 	OK Cancel Reset Defaults Move Up Move Dn

Most commonly used Icons in the Operatory:

- 1. Open Patient
- 2. Scheduler
- 3. Imaging
- 4. Optio(Patient Education)
- 5. Doc Manager
- 6. Odontogram
- 7. History
- 8. Perio Charting
- 9. Communicator
- 10. Optional: Cadi-Images



#### **USER SETUP**

Each *User* can have each module change to the current patient, called *Single Patient Mode*. For example: if you change the patient in the Scheduler, the Patient File, Transactions or other patient specific modules that are open in the Task bar, they all will automatically change to that new person as well.

Power Pract	iceX - Smiles Dent	al Clinic						
File Patient	Office Charting	Practice Ontic	ons Windows Help					
	<u>مه</u> د کو ا	*						
	pr 1 🖑 1 👸		🛐   📭   😿   🎢					
Tasks	💭 General -	Julie Jones - 0000	06 - D01 [Claim Ledger]					
	Julie Jon	es (000006)	- 6	( 🚨 🚨	s 🎄 😬 I	🖻 🞽	🔲 👿 🥩	S 🔧
	General	Treatment Payme	nt Ins Pmt Bulk Ins Charges	Adjustments Orth	io Plan			
000006	Name :	Mrs. Julie Jon	es		👌 🕹 🕹 🕹 🕹	Date: Ja	an 15, 2008	
	P-Note		🖓 Patient - Julie Jones -	000006 - D01				
- <b>W</b>	A-Note		Julie Jones (000006)	- 1	🔎 🚨 🚵 🧖	} 🔊 🥬	/ 🔧 💁 🌮 /	
Julie J.			Patient Personal Add	litional Referrals A	ccount Employer Insuran	ce Recalls Medic	al	
000008	Date L	edger Claim Ledge	Mrs. Julie Jones		Home # : (604) 555-5555		Chart : 000006	
2.2	Claim	# Date	May 04, 1968 F44	🔛 Appointm	ient Scheduler - Julie Jone	s - 000006 - D01		
	00001	9 Sep06,1	2	Julie Jones	(000006) 🔻 M 9 🌲 V	/ 36 🗘 D 6 🌲	Thu Sep 6, 2012 💉	· 💋 🔍 🖃 🔚 📝 -
Julie J. 000006	(0000	12) Sep06,1	2	Scheduler	Patient Profile Appt. Search	h Lists		
			Primary Ins. :	Time	D01-1		D01-2	H01
			-	A00:80		J. J (	(D01)	
			Employer :	-10		Tool	th ache, unner left (AG)	
			Pol. ID :	:10		Too	th ache, upper left (AG)	
			Pol. ID : Group :	:10 :20 :30		Tool I V	ith ache, upper left (AG)	
			Employer: Pol. ID : Group : Holder:	:10 :20 :30 :40		Too I V	th ache, upper left (AG)	
			Employer: Pol. ID : Group : Holder : Cvg. :	:10 :20 :30 :40 :50 09:004	(A) M. A (D01)	Too I V	th ache, upper left (AG)	
			Employer: Pol. ID : Group : Holder : Cvg. : A-Note :	:10 :20 :30 :40 :50 09:00A :10 :20	(A) M. A (D01) 45 (RCT) PEN		th ache, upper left (ÅG)	

This is set by clicking on *Options* (Menu or Icon) and choosing *User Settings*.

Power PracticeX - Smiles Dental Clinic	
<u>File Patient Office Charting Practice</u>	Options Windows Help
🤣 🎝 🔝 🦿 🖉	Desktop
	Environment
Tasks	Mag Station Settings
	Q User Settings
	Chart Settings
	Startup

Put a tick mark in

- 1. Single-Patient Mode.
- 2. Click Save.

#### **STARTUP SETUP**

Based on your *User Login*, you can now have specific modules open up when you start Power Practice Px. Go to *Options* and choose *Startup...* 



1. In the Startup Options screen, choose Start Default Tasks.

2. Under **Module**, choose the screens you want to open when you log into Power Practice Px.

3. Click the Save button. The last Module you choose will be the first one you see when you re-open Power Practice Px.

#### **Other Startup Options**

*Restore Previous Session* will restore the modules you had open when you last logged out of Power Practice Px.

*Save Window Position and Size* will reopen modules to the same size they were when you closed out.

Choosing both *Restore Previous Session* and *Save Window Position and Size* will restore your last modules in exactly the same spot and size they were when you logged out of Power Practice Px. (Note: In Windows, if one of the windows is maximized upon shut down, when the program opens all windows will open in the maximized format. Above features apply if windows chosen are specifically sized).

# **ODONTOGRAM**

A *Date* column has been added to the *History Listing* in the Odontogram.



A New Right Click option enables you to

- 1. Add a New Appointment.
- 2. View Appointment List.



The Pre-existing Screen has been updated to give the user the ability to enter the following:

- 1 Multiple treatments at one time; e.g. RCT and PFM.
- 2. Additional treatments; Implant crowns, posts, and sealants.
- 3. The addition of the *All* checkbox will select all five surfaces of a restoration.

Conditions for 15 Shifted: Tipped:	<u> </u>
Mesial Distal Lingual Buccal Mesial	🗖 Distal 📄 Lingual 📄 Buccal
Rotated:     Others;       Mesial     Distal       Tooth Watch Surfaces:     Partial Eruption       M     O       D     B	tema 🦳 Missing 📄 Impacted vding 📄 Root Tip
Pre existing Treatment: Condition Porcelain Porcelain Fused V Stainless Steel Root Canal Implant Crown Post Sealant Custom Conditions; Setup	Caries C
<	el Next>>>

# PRE-EXISTING/CUSTOM CONDITIONS SETUP

3 new pre-existing codes have been added to chart. Go to Charting, Preexisting/Custom Conditions Setup.

0.	0.		•	1	In.	<u>O</u> dontogram
(				[	0	Periodontics
Setup Preexisting Co	odes and Cust	om Conditions				Patient <u>H</u> istory
Preexisting Codes	x		Custom Conditions:	S	2	Survey
Amalgam:	21501	Change	Condition 1:		2	<u>A</u> lerts History Comments History
Composite:	23701	Change	Condition 2:		<b>6</b>	P <u>a</u> tient Picture
Gold:	24301	Change	Condition 3:	1	<i>1</i> 17	<u>X</u> -Ray Images
Porcelain:	02551	Change	Condition 4:		<b>*</b>	<u>3</u> D Image
Fused Porcelain:	27250	Change	Condition 5:			Provider Setup/Selection
Stainless Steel:	22351	Change				Extra Alerts Codes Setup
Implant:	06999	Change		_		<u>C</u> omments Setup
Root Canal:	33009	Change				Preexisting/Custom Conditions Setup
	Custom				ŀ	Survey Setup
	Colour					P <u>r</u> inter Setup
Implant Crown:	27209	Change				Import
Post:	25779	Change				
Sealant:	13499	Change				

1. Pre-existing codes for Implant Crown, Post and Sealant are new. You will need to enter in the 3 codes shown to be able to use them.

# PERIODONTICS

You can now edit or add to an existing Perio Chart within the same day. If you close the Perio Chart without saving there is now a warning.

# **CHART NOTES AND COMMENTS**

In the Comments History you can now show note types with an icon.

- 1. In the Chart History, click on the View Options.
- 2. Put a tick in Show Note Type Indicator.



In all notes areas of Chart, you can choose how you want to view them. The font and Size are customizable to who you log into the program as.

Site Display Type	Comments Others Creation Date 08, Cincal V Modity Date 08,	- D01 - Smiles John 16/2013 -	
cno	ose your o	wn joni	ana size
		Font	
	Font	Font style	Size
	Eucla Collegativ	Italic Bold	28
	Lucida Console	Italic Bold	24 26
	Lucida Handwritir		36
	Lucida Sans Unicode Waanata		48 72 ¥
	S - 77	Sample	
		AaDh	1417
		Aubo	yy2
		Script	
		Western	~
	Show more forts		
	and the second sec		

# **PATIENT ALERTS FOR CHART**

You can now access *Chart Alerts* from Power Practice Px.

- 1. Go to the *Additional* tab or *Medical* tab in the *Patient* file.
- 2. Click the *Chart Alerts* button.

New Additional - Jane Jane J (000025) Patient Personal Addi	J - 00025 - D01	1
Patient Comments:		Save
Office Codes	0f2:	
Patient Alerts Al1 : AF	Al2:	Chart Alerts
Medical Med/Gov't Cd1 : Med/Gov't Cd2 : RAMQ Expiry Date (mmyy) : Open Date : Pre-Determination Pre-Det #1 :	Select Alert	Extract Tth Teeth Apt History Oth Contact Custom

From the *Chart Alerts* you can Define new codes and Remove those that you no longer use.

# **TREATMENT PROPOSALS**

Treatment Proposals can now be created from within the Odontogram .

1. To create a proposal, click on the *Proposals* tab. Choose the procedure you want to post from the *Quick Buttons*.

2. Right click on the *Odontogram* and choose one of the following three actions; *Add to Temporary List, Add to a New Proposal, Add to an Existing Proposal* 



1. Choosing *Add to a New Proposal* will add the procedure to the right hand side under the blue bar as a new proposal.

2. Choosing *Add to Existing* Proposal will add the procedure to the proposal you have highlighted on the right hand side under the blue bar.

Irea	Code Site	osals Surf.	Description	Date	Code	Site	Surf.	Prod.	Description			
				000001 08/23/12	33111	11		D01	Add to New Proposal PERM RCT 1 CANAL			
				000002 08/23/12 08/23/12 08/23/12	27213 99111 33111	11 11 11	MIDBL MIDBL	D01 D01 D01	Add to Existing Proposal PORC CR W PORC MARGIN Lab- Cm Porc/Ceram/4m PERM RCT 1 CARAL			

3. Choosing *Add to Temporary List* will add the procedure to the left hand side under the purple bar to use for creating different combinations of treatment.

From the *Temporary list* you can create proposal options for the patient.

4. Highlight the procedure(s) you want to put into a proposal, right click.

5. Choose *Add to New Proposal* and a new option will be created on the right hand side under the blue bar.



6. Choose *Add to Existing Proposal* and the highlighted treatment on the left side will be added to the existing proposal on the right hand side under the blue bar.

						Add to New Pro	posal						
				6		Add to Existing	Proposal						
Teeler	Remove from List		st										
Trea	unents	Prop	osals			Sort List By		•					
	Code	Site	Surf.		De	scription	Date	U	bde	Site	Surf.	Prod.	Description
	27213	11	MIDBL	PORC C	:R W	PORC MARGIN	000001						Add to New Proposal
	33111	11		PERM F	RCT 1	CANAL	08/23/12	33	111	11		D01	PERM RCT 1 CANAL
	23602	11		COMP B	BUILD	UP							
							000002						Add to Existing Proposal
							08/23/12	27	213	11	MIDBL	D01	PORC CR W PORC MARGIN
							08/23/12	99	111	11	MIDBL	D01	Lab- Crn Porc/Ceram/-Im
							08/23/12	33	111	11		D01	PERM RCT 1 CANAL
							08/23/12	23	602	11		D01	COMP BUILD UP

# **Proposal Statuses**

When a proposed treatment option is either *Accepted*, *In Review*, or *Rejected*, the status can be changed by a Right Click.

If *Accepted*, the proposal will move to the treatment tab as *Planned*. If *In Review* (presented, no decision made), the proposal will remain as is. If *Rejected*, the proposal will be removed from the Proposals tab.



**Please note:** When adding a new proposal or making changes to an existing one, that information will also update in the Treatment Proposals module of Power Practice Px.

# **Proposal Options**

1. The *Options* on the right click menu of the Proposals area will bring up the *Proposal Options*.

2. Choose which Treatment Statuses you want to view along with the Treatment Proposals.

3. You have an option for Default Billing Dr/Provider. The default is Transaction Settings.

4. You can now view Fee Columns on the Proposals Tab.

F	Proposal Options
	Treatment Statuses to View
2	Pre Existing In Process
	Treatment Plan Completed
	_ Default Billing Dr/Provider
3	Transaction settings
	Currently Selected Provider (from Dropdown)
	Add Labs when Required
	Ask
4	Show Fee Columns
	Accept Course



Trea	tments	Proj	posals										
	Code	Site	Surf.	Description	Date	Code	Site	Surf.	Prod.	Pat	Ins	Total	Description
	20111	12	I	1 TTH CARIES CTRL	000001								
	27201	21	MIDBL	PORCELAIN CROWN	10/08/12	20111	12	- I	D01	0.00	70.70	70.70	1 TTH CARIES (
					10/08/12	27201	21	MIDBL	D01	275.20	275.20	550.40	PORCELAIN CR
								Totals:		275.20	345.90	621.10	
									4				

# **Posting Multiple Restorative Procedures**

You can now select multiple teeth and surfaces when posting amalgams and composites, Power Chart will pick the correct codes.

Choose your code, choose your teeth and surfaces and either Complete, Incomplete or Plan them all together. You will not need to post each tooth individually.



# **Chart Alerts**

You can now print a list of your Chart Alerts.

	Setup Alerts	×
Code	Descriptions	
Priority	Normal V	
-		
ALH	Hay Fever/Hives/Skin Rash	<u>^</u>
ALM	Metal Allergy	
CISCH	Chemotherapy	
CISRT	Radiation Therapy	
HAAD	Autoimmune Disease	
HAAJ	Artifical Joints	
HAAN	Anemia	
HAART	Arthritis	
HABD	Bleeding Disorder/Clotting	
HAC	Cancer	~
Add	Delete Modify Print Close	

# **Comments Search**

You can now search on your pre-set comments in Chart. You can search by Code or Description. This is found in the *Comment Templates* button when you add a new Comment.

Site: Othe	HS Y	Creation Dates		$\sim$		
		Creation Date:	09/06/2013	E 📑 🖻 🕞 🕻	а 🐉 1	fr
Display Type: Clini	cal 🗸	Modify Date:				-
		tomatic Search Code CBTX CBFL COMPCL COMPCL	Tooth prepared for Used Discussed FGC vs PFM: D Show Pt photo of wear on etch, bond, flowable, com	ct Comment Se Description size and cords in Hemodert wiscursed with pt how with PFM or teeth and discursed why they sho cosite-shade: occlusal adjustment occlusal occlusal occlusal adjustment occlusal occlusal occlusal occlusal adjustment occlusal occlusal occlusation	arch Se aith Trazz own the o suid be t	Accept Cancel arch By Code Description
	Cle	ar 🗌 İnsert	New Line Between Comm	ents		