

GET YOUR
“NEXTPERTISE™”

ON

QSiDental | UGM

Presenter(s):

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Topic

Effective Dental Clinic Management for CPS

Level

Tuesday, November 13 – 11:00AM to 12:15PM

Things our lawyers make us say...

Neither QSiDental nor any presenter at the Users Group Meeting is engaged in rendering legal or other professional advice and this presentation is not a substitute for the advice of your attorney, accountant and/or other professional advisor.

Session Guidelines

- Turn off all cell phones & pagers
- Questions will be addressed at the end of the presentation
- Refrain from personal discussion

Effective Dental Clinic Management

- **CPS Scheduling**
 - Appointment Details
 - View Preferences
 - Right Click Options
 - Templates and Status Colorization
 - EDDA Scheduling Display
 - Appointment Search Ahead
 - Recall Plans

Effective Scheduling

- Appointment details
 - Photo
 - Health History status
 - Future Appointments
- Right Click Options
 - Status Colorization
 - Modify or cancel
 - Cut or Copy
 - Open Chart or View Pt Summary
- View Options
 - Work days only
 - Show production totals
 - Hide/Show patient names

Today ◀ Day ▶ ◀ Week ▶ ↻

Nov 20, 2012 Tuesday
 GEORGE MONTGOMERY (31)

20	New Patients
30	New Patients
40	New Patients
50	New Patients
9 AM	Restorations
10	Restorations
20	Restorations
30	Restorations
40	Restorations
50	Restorations
10 AM	Crown and Bridges
10	Crown and Bridges
20	Crown and Bridges
30	Crown and Bridges
40	Crown and Bridges
50	Crown and Bridges

Appointment Status, Block and Reserve Codes

Scheduling Codes

Appt. Status Codes Reserve Codes Block Codes

Code	Description	Color	Sequence
C?	Confirmed...	[Yellow]	
CP	Pt Running Late	[Brown]	
C	Unconfirmed	[Light Green]	0
C+	Confirmed	[Blue]	1
CI	Arrive	[Light Green]	2

Scheduling Codes

Appt. Status Codes Reserve Codes Block Codes

Code	Description	Color
R1	** New Patients **	[Light Green]
R2	** Emergency **	[Red]
R3	** Consultation **	[Pink]
R4	** Crn & Bridge **	[Light Blue]
R5	** Surgery **	[Purple]
R6	** Essential 30 **	[Orange]

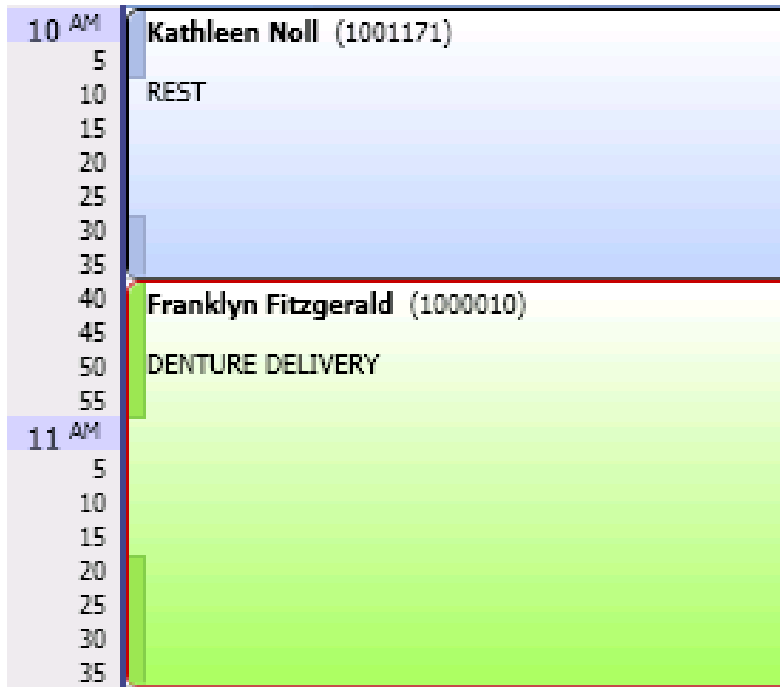
Scheduling Codes

Appt. Status Codes Reserve Codes Block Codes

Code	Description	Color
B1	-----	[Grey]
B2	-----	[Cyan]
B3	** VACATION **	[Pink]
B4	** NOT IN **	[Red]
B5	** STAFF MEETING **	[Yellow]
B6Lunch.....	[Teal]
B7	Surgery/Do Not Sched	[Olive]

EDDA Schedules

- Left borders display Asst/Dr/Asst time in darker bar
- Easy entry with validation



The 'Edit Appointment' dialog box displays the following information:

- Provider: MONTGOMERY, GEORGE (031)
- Location: DOWNTOWN CLINIC
- Date: 11/20/2012
- Patient:
Patient #: 1000010
Name: Franklyn Fitzgerald
Birth Date: 03/05/1922
Phone #1: 212-9716
Phone #2:
Appt Phone: (036) 212-9716
- Appointment:
Start Time: 10:40 AM
Units: 6 (1 hr 00 min)
EDDA Units: Assistant (3), Doctor (2), Assistant (1)
 Two-column appointment
Type: DENTURE DELIVERY
Description: DENTURE DELIVERY

Buttons: OK, Cancel

Scheduling Tools

Appointments for Kathleen Noll							<input checked="" type="checkbox"/> Account appointments
Patient Appointments	Date	Time	Patient	Provider	Confirmation	Description	
Appointment Search	11/19/2012	10:15AM-11:30AM	STEVE NOLL	SHARON MICHAELS	Appt Status - Unreachable	SINGLE CRN PREP	
	11/20/2012	10:00AM-10:40AM	KATHLEEN NOLL	GEORGE MONTGOMERY	Confirmed	REST	

Appointment Search

Appt phone: Location: MAIN LOCATION Days: Sun Mon Tue Wed Thu Fri Sat Clear

Start date: 10/27/2012 6 From: 6:00 AM Window of time:

End date: 10/27/2013 + To: 8:00 PM

Add	Patient	Provider	Appt Type	Units	Type of units	Coordination	New Search
<input type="button" value="Add"/>	<input type="text"/>	<input type="text" value="NUGGETT, KEN (300)"/>	<input type="text" value="No type"/>	<input type="text"/>	<input type="text" value="Open"/>	<input type="text"/>	<input type="button" value="New Search"/>

- Account/Family Appts
- Search Ahead
 - Multiple Patients or Providers
- Recalls
 - Single
 - Multiple

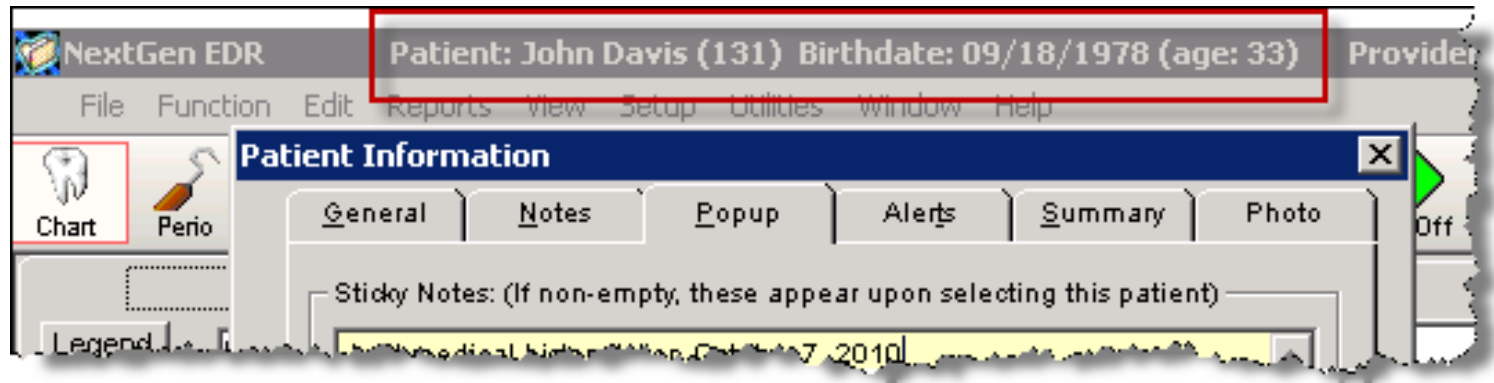
Recall	Provider	Date	Reason	Comment
1.	MONTGOMERY, GEORGE (031)	01/28/2013	3 mo perio recall(20)	
2.	DANIELS, DAWN (015)	04/29/2013	6 mo. prophy(10)	
3.		//		
4.		//		
5.		//		

Effective Dental Clinic Management

- **Time Savers**
 - **Information Validation**
 - **Document “create new” from button**
 - **Patient Information Summary Page access from Schedule Right Click**
 - **Batch Processing – routing slip and selected forms**
- **Reduce Errors / Increase Accuracy**
 - **Timer /Clock Feature**
 - **QSI Image (Apteryx)Synchronization**
 - **Improved data entry and tracking**
 - **Intake and Dismiss notes**
 - **Post codes or second notes from notes**
 - **Reporting and Tracking**
 - **Approval Management**

Validation of Information

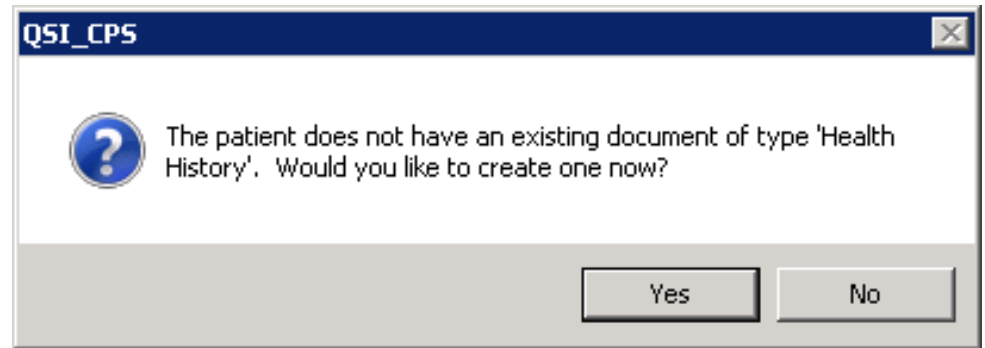
- Patient Title Bar
 - Quickly confirm the patient's identity using the title bar which now displays the patient's age and birthdate
 - Patient's name, age and birthdate display on the title bar even when the Patient Information screen is open.



Create new doc from toolbar button

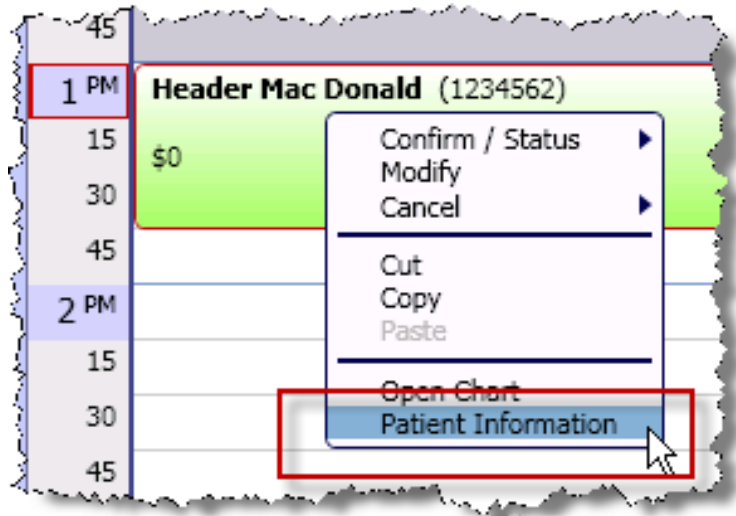
A custom toolbar icon that launches a specific document will now prompt the user to create a new one if no existing document is in the patient's record.

No longer have to look up with the “docs” button and choose from the drop down list.



Access Patient Summary from Schedule

- Open the Patient Summary screen directly from an appointment with the right-click menu.

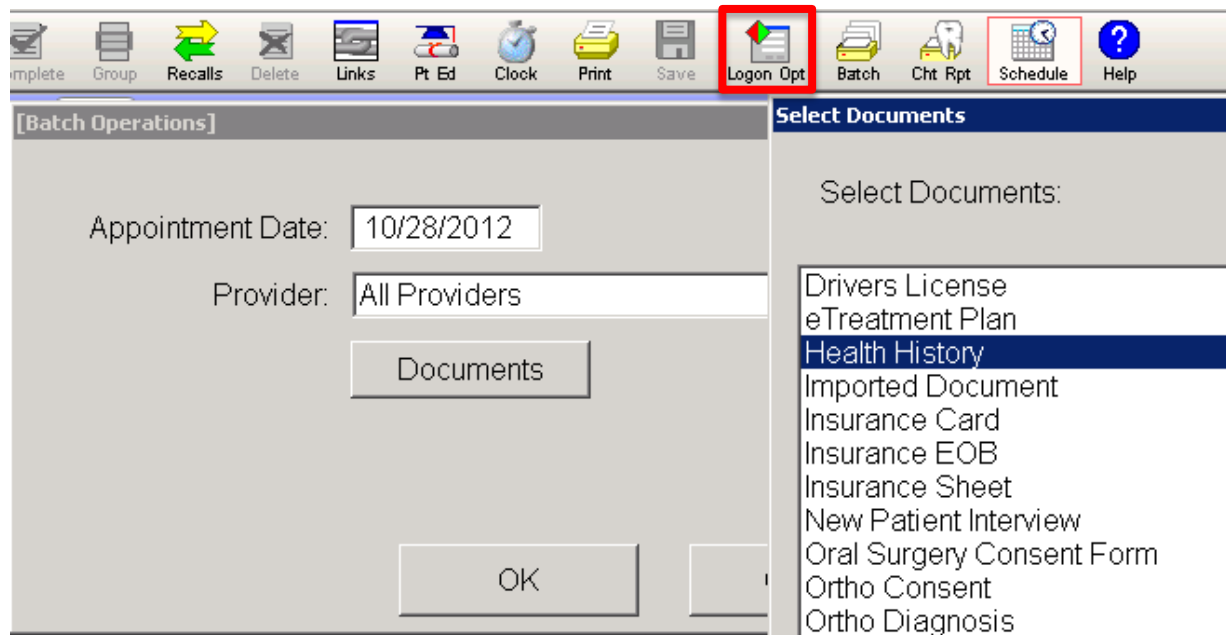


Patient #: 0001302
Patient Name: EMILY ALLEN
Home Phone: (714) 990-8765 Work Phone: (562) 890-7654
Last Visit Date: 04/28/2011
Next Appointment: 11/19/2012 09:00

	<u>Number</u>	<u>Most Recent</u>
Perio Charts:	0	None
PSR Charts:	0	None
Planned Services:	4	04/28/2011
Existing Services:	0	None
Completed Services:	6	04/28/2011
Notes:	1	08/12/2008
Periodic Exams:	2	04/28/2011
Detailed Exams:	0	None
Complete Series:	0	None
Panoramic Series:	1	08/12/2008
Bitewings:	1	08/12/2008
Prophies:	1	08/12/2008
Perio Maintenance:	0	None
Scaling/Root Planing:	0	None

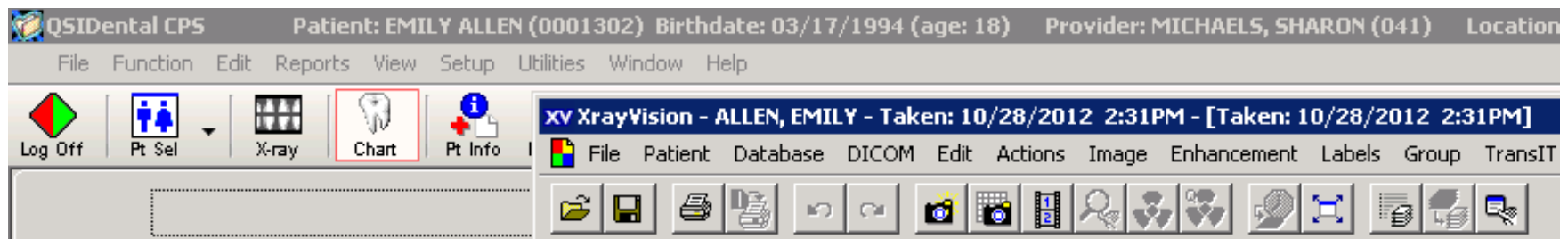
Batch Processing

- Print batch information and documents for patients with upcoming appointments through a simplified window.
- Select the appointment date, a specific provider if desired and the appropriate documents.
- The routing slip includes a graphical chart printout, all planned items, the last visit details plus any selected documents.



QSI Image (Apteryx) Synchronization

- Simplify access and increase accuracy as you work with Apteryx X-ray systems in connection with CPS. Apteryx will automatically close the patient x-ray record when you close the patient's chart in CPS.



Intake Note

SmartNote Replacements

*Med History	changes entered on p
Vitals	120/87
Currents Meds	none
*Time out	CPE/ JME
*Pain scale	2

*Pain scale

0
1
2
3
4
5
6
7
8
9
10

Multiple Accept Field

Chart Note

Description: Checkin/Intake

Note Date: 10/29/12 Entered: 10/29/12

Provider: MICHAELS, SHARON (041)

Tooth #s:

Medical history - changes entered on popup. Vitals - 120/87. Current Medications - none. Time out - CPE/ JME. Pain scale - 2.

Chart Details

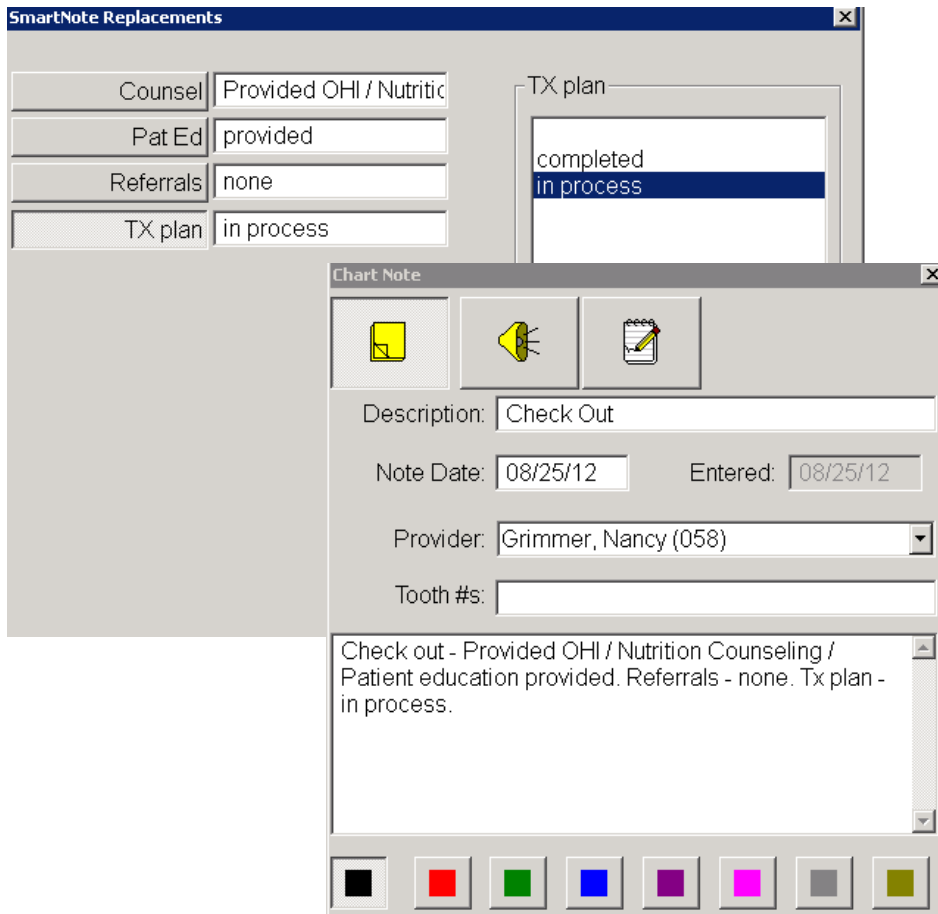
Teeth	Surfaces	Code
		Ck In

Services... Condition

Palette: Northside

Ck In	Exam	X-Rays
Resin	Amal	Sed Fill
Rt Canal	Endo-TX	Pulp

- Uses common “initial step” to insure entry.
- Include compliance questions and make entries mandatory with *.
- Can be customized to only what the practice feels is important.



Checkout Note

- Single point of repeated entry at end of visit so users do not forget.
- Completely customizable.
- Selections can auto post codes for tracking that go to QSI for easy reporting.
 - Patient Education Provided
 - Treatment Plan Status
 - Referrals

Date	User	Grp	P	Prov	Code	Description	Tooth	Surface	Type
08/25/12	CindyP			058		Check out - Provided OHI / Nutrition Counseling / Patient education provided. Referrals - none. Tx plan - in process.			Note
08/25/12	CindyP			058	D1330	Oral Hygiene Instructions			Completed
08/25/12	CindyP			058	D1310	Nutrit Couns For Control Of Dent Dis			Completed

Post Local or ADA Codes from Notes

- Codes can be posted from any note and they do not have to only be local or tracking codes, they can be actual ADA codes of items frequently missed.

SmartNote Replacements

Counsel	Provided OHI /Tobacco
Pat Ed	provided
Referrals	Periodontist;
TX plan	completed

TX plan

- completed
- in process

Date	User	Prov	Code	Description	Type
08/31/11	Allie	030	D1320	Tob Couns Control And Prev Of Oral Dis	Completed
08/31/11	Allie	030	D1310	Nutrit Couns For Control Of Dent Dis	Completed
08/31/11	Allie	030	8000	Referral to Specialist	Completed
08/31/11	Allie	030		Check Out	Note
Check out - Provided OHI /Tobacco Counseling / Nutrition Counseling / Patient education provided. Referrals - Periodontist;. Tx plan - completed.					

OK Edit

Examples include:

- Interim Steps for Multi-Apppt Procedures
- X-rays taken
- OHI / Nutrition Counseling
- Tobacco Counseling

Tracking Codes - Products

- Post codes for products
 - Example - Sonicare TB or Home bleaching
 - Default Provider to a Non-clinical Provider

Add/Edit Note

ID: 184 Note Name: Recommended/Sold

Recommended {Recommend: Fluoride;, Floss;, Floss Threader;, "Stimudent;," Proxybrush}

Sold to patient - {Sold items: [TX=Sonic]Sonicare Toothbrush, [TX=6000]Home Bleaching Kit}

SmartNote Replacements

Recommend: Fluoride; Stimudent;
Sold items: Sonicare Toothbrush

Sold items:
Sonicare Toothbrush
Home Bleaching Kit

Multiple Accept Field

OK Edit

Chart Note

Description: Recommended/Sold

Note Date: 10/28/12 Entered: 10/28/12

Provider: MICHAELS, SHARON (041)

Tooth #s:

Recommended Fluoride; Stimudent,
Sold to patient - Sonicare Toothbrush

Edit Service

Service Code: SONIC ADA Code: 56789 Description: SONICARE TOOTHBRUSH

General Smart Codes Notes

Category: Miscellaneous Category

Service Type: Miscellaneous Others

Draw Type: (None) Draw Transparent

Draw Pattern:

Affected Area: Mouth Use only one code for multiple teeth

Standard Fee: 0

Active
 Allow Free Form Description

Service Normally Performed By:
 Dentist Hygienist

Default provider to: ROOM, CHAIR (099) Do not allow changing the defaulted provider

Date	User	Grp	P	Prov	Code	Description	Tooth	Surface	Type	Amount
02/29/08	2					Insurance Card			[SD] Insurance Card	
06/16/08	2					Health History			[FT] Health History	
02/04/09	2					Oral Surgery Consent Form			[FT] Oral Surgery Co...	
06/02/09	2					Pediatric Behavior Management			[FT] Pediatric Behavi...	
10/28/12	3			041		Recommended - Fluoride; Stimudent			Note	
						Sold to patient - Sonicare Toothbrush				
10/28/12	3			099	SONIC	SONICARE TOOTHBRUSH			Completed	99.00

Post a Note from a Note

- Post a note from another note
 - Insures that based on an initial note response if additional information is needed, a second note can be set to automatically pop up.
- Common Examples:
 - Anesthesia Used – if yes, a second note listing the anesthesia types and other pertinent details could follow.
 - Exam note could simply ask Soft Tissue Exam with options of WNL or Irregularities found. If irregularities, the second note could bring up all the Soft Tissue options to allow the provider to select.

Incomplete Treatment Report

- Get patients back in for Tx
- From and to Date
- Logged on Provider or All Providers
- Sort by Patient ID, Name or Provider ID
- Additional Notes

Printed by User Id: 3

QSI Open Item Dev/Pub (CPDP)

10/28/2012 08:31 pm Page 1 of 1

17822 E 17TH STREET, SUITE 101
TUSTIN, CA 92680
(714)731-7171

INCOMPLETE TREATMENT PLANS FOR PROVIDER 041

Patient	Date	Code	Type	Description	Tooth	Surface	Fee	Prov
0001300 ALLEN JOHN Next Appointment: None	06/04/10	02140	Planned	AMAL 1 SURF, PERM/PRIM	10	M	75.00	041
							Subtotal:	75.00
0001302 ALLEN EMILY Next Appointment: 11/19/2012 09:00	04/28/11	02330	Planned	ANTERIOR RESIN 1 SURF	10	M		
							Subtotal:	
0010920 JACOBSON ANDREW Next Appointment: None	07/14/11	02150	Planned	AMAL 2 SURF., PERM/PRIM	8	DI		
							Subtotal:	
0011040 ANDERSON WILLIAM	06/03/10	02810	Planned	CROWN 3/4 CAST METALLIC 1				
0011040 ANDERSON WILLIAM Next Appointment: None	06/03/10	02810	Planned	CROWN 3/4 CAST METALLIC 2				
							Subtotal:	
2002000 TEST JANE	06/06/11	02140	Planned	AMAL 1 SURF, PERM/PRIM	5	M		
2002000 TEST JANE Next Appointment: None	06/06/11	02140	Planned	AMAL 1 SURF, PERM/PRIM	11	M		
							Subtotal:	150.00
							Total Fee:	405.00

Summary Report: Incompleted Treatment Plans

From: 07/01/2011 To: 08/31/2011 All Providers

Sort by: Patient Id Patient Name Provider Id

Additional Notes:

Print Close

Timer Feature



Manage and track the timing of activities, giving you a better sense of and control over the flow. In addition to a traditional clock, you can:



- Use the timer feature to manage timing of procedures or activities such as anesthesia or fluoride treatments
- Use the stopwatch feature to track procedures or activities such as wait time

Approval Management

- Office Managers can now review charts that have items that have not been approved. They can easily determine if a provider is not completing the required chart approvals.

Advanced Search Options

Display patients with charts needing approval

Chart items entered by:

Chart items entered on my behalf.

Chart items entered on behalf of anyone.

Include inactive patients

Hide personal information

Last Name	First Name	Birth Date	Person #	Home Phone	Entry Date	User
Dacaney	Gerald	11/04/1940	193	(404) 999-9999	6/7/2011	Charles Cook
Dacaney	Gerald	11/04/1940	193	(404) 999-9999	6/7/2011	Joseph Barclay
Hathaway	John	10/03/1967	220	(715) 847-8837	6/9/2011	Joseph Barclay
Anton	Mary	10/19/1959	93	(404) 298-3479	6/8/2011	Maureen Brown
Knealy	Ralph	11/13/1987	91	(214) 854-7574	6/23/2011	Bentz, Bruce
PACE	SUSAN	04/01/1942	12	(215) 467-9937	7/6/2011	Joseph Barclay
PACE	SUSAN	04/01/1942	12	(215) 467-9937	7/6/2011	Charles Cook

Effective Dental Clinic Management

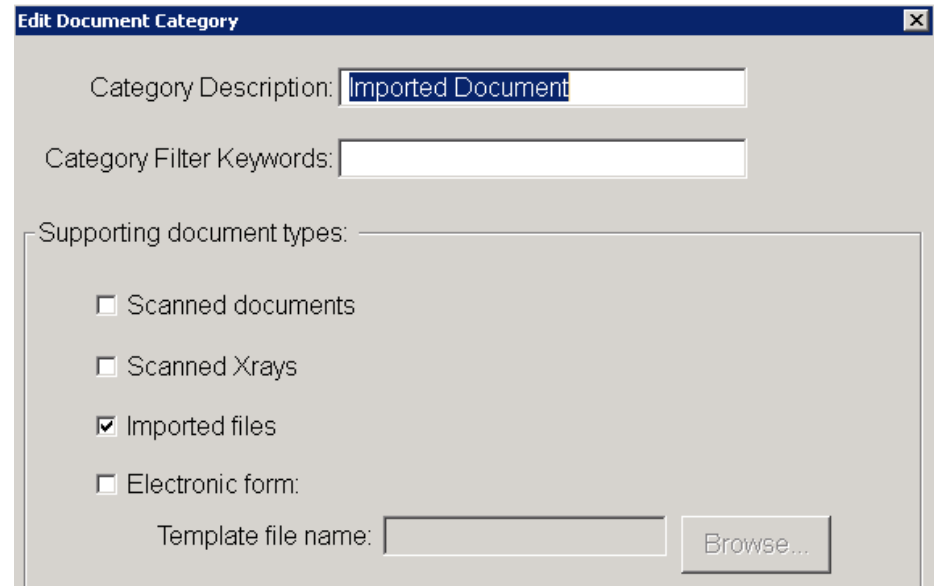
Forms and Reports

- Improved File Import Options
- Reasons to use Fill-in Forms
- New Form Features
- User Access Report
- Patient Access Report

Importing Documents

Increase the information contained within the electronic chart by importing PDF and multiple page TIFF files, for example, emailed files or insurance documents.

- No longer limited to image file types
- Multiple pages now supported
- The file type will be opened by the supporting program i.e. Adobe PDF
- Can be helpful in transferring paper chart details for new clients.



Edit Document Category

Category Description:

Category Filter Keywords:

Supporting document types:

- Scanned documents
- Scanned Xrays
- Imported files
- Electronic form:

Template file name:

Reasons for using Fill In Forms

- Fill In Forms
 - Form data creates a table in the database that allows use of third party reporting tools to capture the data for reports.
 - More data fields now available to import from the database.
 - Fill in forms can allow a copy forward option which will save time and improve accuracy.
 - Form fields can be set to mandatory and form cannot be saved with missing data.
 - Form entries can actually create a note from the form details.

New Form Features

- More data can be added to the form from the database.
- Data captured on the form can create conditions, codes and notes.

CLINICAL EVALUATION:

Food Impaction Areas:

Fractured Fillings:

Abrasions/Abirractions:

Potential Cusp Fracture Areas:

7.	Are any of your teeth sensitive?	<input type="radio"/> Yes	<input type="radio"/> No
	Under what conditions?	<input type="checkbox"/> Hot	<input type="checkbox"/> Cold
8.	Have you ever had teeth removed?	<input type="radio"/> Yes	<input type="radio"/> No
9.	If teeth were removed were they replaced	<input type="radio"/> Yes	<input type="radio"/> No
	What was used to replace the missing teeth?	<input type="checkbox"/> Permanent Bridge	
		<input type="checkbox"/> Removable Partial	
	* Year the teeth were replaced (approximate dates for all replacements)	<input type="checkbox"/> Complete Denture	
10.	Have you ever had any root canals to save abscessed teeth?	<input type="radio"/> Yes	<input type="radio"/> No

User Access Report

User Activity Report

From: To:

User(s): All Users

Notes:

NextGen EDR

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USER SUMMARY REPORT FOR USER JAMES LASAPONARA (2)

Date	Patient	Area	Comment
09/04/2012 12:59:11		Logon	Logon
09/04/2012 12:59:14	Brown, Mary (331)	Patient Access	Accessed
09/04/2012 12:59:56	Doe, Jane (130)	Patient Access	Accessed
09/04/2012 13:00:06	Doe, Jane (130)	Patient Access	Accessed
09/04/2012 13:00:14	Doe, Jane (130)	Tooth Chart	New item added
09/04/2012 13:00:21	Doe, Jane (130)	Tooth Chart	Item modified
09/04/2012 13:00:21	Doe, Jane (130)	Tooth Chart	New item added
09/04/2012 13:00:22	Doe, Jane (130)	Tooth Chart	Operatory note
09/04/2012 13:00:58	Doe, Jane (130)	Tooth Chart	Item deleted
09/04/2012 13:00:58	Doe, Jane (130)	Tooth Chart	Item deleted
09/05/2012 06:50:00		Logon	Logon
09/05/2012 06:50:00	Doe, Jane (130)	Patient Access	Accessed
09/05/2012 16:15:18		Logon	Logon
09/05/2012 16:24:04	Thomas, Sandra (112)	Patient Access	Accessed
09/05/2012 16:25:58	Thomas, Sandra (112)	Patient Access	Accessed
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added

Patient Access Report

Patient Activity Report

From: To:

Patient:

Notes:

NextGen EDR 09/28/2012 02:31 pm Page 1 of 4

()

USER SUMMARY REPORT FOR SANDRA THOMAS (112)

<u>Date</u>	<u>Patient</u>	<u>Area</u>	<u>Comment</u>
09/05/2012 16:24:04	Thomas, Sandra (112)	Patient Access	Accessed
09/05/2012 16:25:58	Thomas, Sandra (112)	Patient Access	Accessed
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	Operatory note
09/05/2012 17:20:32	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:32	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:32	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted

James Lasaponara (2)
 James Lasaponara (2)
 James Lasaponara (2)
 James Lasaponara (2)
 James Lasaponara (2)
 James Lasaponara (2)
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 James Lasaponara (2)
 James Lasaponara (2)

Showcase Your Practice with Video Presentations



- Customized for your practice.
- Play in reception area
- Encourages referrals
- Professional, non-intrusive way to introduce:
 - The doctors & the dental team.
 - High-tech equipment and special procedures.
 - Financial policies, case illustrations and more.

Patient Education



SideKick
Chair-side Patient Education

Chair-side Dental Patient Education Program

More Features Than All The Competition Combined:

- Print Any Screen
- E-mail Any Screen
- Office Profile
- Pause & Play Tool
- Drawing Tool
- Customizable Menus
- Smile Imaging
- Movies Play Sequence
- Quick Appliance
- Bilingual Content
- Audible Content
- Add Your Own Procedures

- Higher Tx acceptance as the education establishes a higher comfort level with patients
- Education videos allow your patient to take advantage of downtime in the chair
- Provides an opportunity to sell optional treatment
- Helps the patients to ask pertinent questions

Any Questions?