topsOrtho™

Training Manual

version 7.0

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Lesson 1 Introduction to the Mac & OS X

Lesson One Overview

This lesson focuses on basic computer operations. Topics include how to use the Apple menu bar, keyboard shortcuts, the topsOrtho menu and Screen Sharing.

Objectives:

To become familiar with the Mac computer, you will:

1A Learn about the Apple Menu Bar
Menu bars contain commands that tell the computer what to do.

1B Learn about Keyboard Shortcuts
The Mac computer allows you to perform many functions with keyboard commands rather than by clicking the mouse.

1C Introduction to the topsOrtho Menu Applications
You will view specific topsOrtho menus, their preferences, and learn how to set up your practice.

1D Become Acquainted with Screen Sharing
When you call tops Customer Support, a representative will be able to see your computer screen during the call. You give permission for this with a Screen Sharing option, located in the Help menu.

1A The Apple Menu Bar

Once you have turned on your computer, the desktop is displayed. You'll always see a menu bar across the top of the screen, beginning at left with the Apple menu. The menu bar items change to correspond with the active program. Menus contain several commands that are displayed once a menu bar item is clicked. These items tell the computer what to do. The following shows the basic Apple menu with no active programs.

Figure 1-1: *Apple Menu Bar*

Once you have opened a program its name will be displayed **in bold** to the right of the Apple icon.

Figure 1-2: *Opened topsOrtho Program Menu Bar*

Clicking on the Apple icon will display the following Apple menu commands, along with any available keyboard shortcuts.

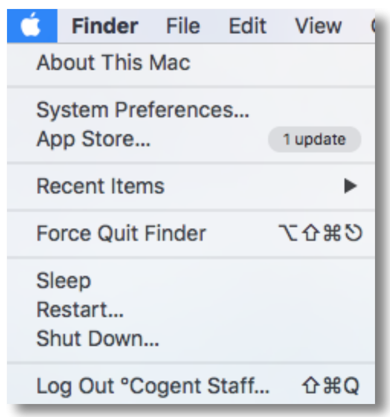


Figure 1-3: *Apple Menu Commands*

The following table describes the Apple commands in more detail. Two of these menu items should not be changed (as noted) unless you are advised by topsOrtho Customer Support to update your server.

Menu Item	Description
About This Mac	Displays Operating System version and information about the computer's speed, memory, etc.
Software Update...	Checks for software updates. DO NOT perform any updates to your server unless topsOrtho advises you to
App Store...	Opens Apple's App Store
System Preferences...	Allows for set up and customization of the computer
Dock	Allows you to position and modify the appearance of your dock, which gives you quick access to frequently used applications
Location	Network/internet connection information
Recent Items	Displays recent documents on the computer
Force Quit...	Closes the current program. Use when the "spinning color wheel" is present for extended amount of time
Sleep	Puts the computer to "sleep" or energy saving mode
Restart…	Restarts the computer
Shut Down…	Powers off the computer
Logs Out	Logs out of current user account

Closing a Window

Once you are finished with a window you may want to close it. A fast way to close a window is to single click the red button located in the top left corner of the win-
or use the keyboard shortcut Command + W.

Keyboard Shortcut
Command + W

on
dow

Figure 1-4: *Window Dialog Close button*

1B Keyboard Shortcuts

Keyboard shortcuts are an efficient way to navigate through windows and programs.

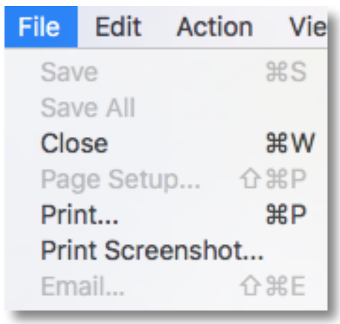
Keyboard shortcuts use the Command (⌘ icon) key, along with another key (or keys). Hold down the Command key and then press another key to tell the computer the function you would like to perform. There are two Command keys, located directly to the left and right of the space bar.

Standard Mac Keyboard Shortcuts	Function	Standard tops-Ortho Keyboard Shortcuts	Function
Command + A	Select All	Command + 1	Contracts/Transactions
Command + C	Copy	Command + 2	Claims
Command + O	Open	Command + 3	Appts/Recalls
Command + S	Save	Command + 4	Referrals
Command + P	Print	Command + 5	Forms/Letters/emails
Command + Q	Quit	Command + 6	Tx Phase Info
Command + V	Paste	Command + 7	Treatment Plan
Command + W	Closes Active Window	Command + 9	Images
Command + X	Cut	Command + 0	Treatment Notes
Command + Z	Undo	Command + N	New Patient
Command + M	Minimizes Active Window	Command + T	New Transaction
F3	Splits all windows	Command + U	Make New Appointment
F2	Splits windows within the current program	Command + L	New Form/Letter
F1	Clears all windows	Command + R	Referrer Information
Command + Option + 8	Turns on/off zoom	Command + B	Appointment Book
Command + Option + (+/-)	Zoom in/out	Command + Shift + F	Patient Flow

1C Introduction to topsOrtho Menu Applications

You will be introduced to four menu applications that are specific to topsOrtho. A brief description accompanies each drop down menu.

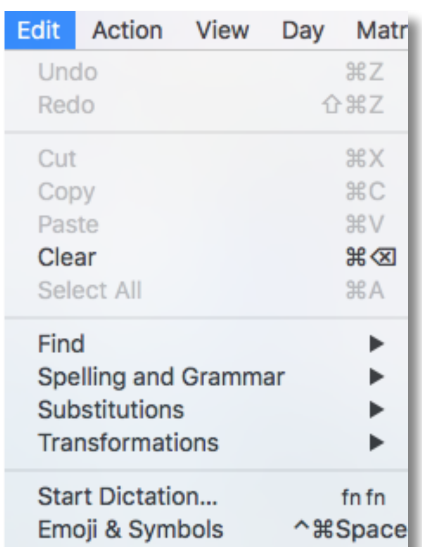
File menu



Save - Saves what you are currently working on. Usually not necessary to use in topsOrtho. This is more of a computer function.
Save all - Saves everything you are currently working on. Usually not necessary to use in topsOrtho. This is more of a computer function.
Close - Closes the program.
Page Setup - Change your page orientations and printer.
Print - Prints the current document.
Print Screenshot - Prints out a specific window in topsOrtho.
Email - Email from tops if the outgoing mail server is set up.

Figure 1-5: *File Menu*

Edit menu



Undo - Reverses the last operation that you performed.
Redo - Reapplies the last “undo” operation that you performed.
Cut - Cuts a selected item.
Copy - Makes a duplicate of a selected item.
Paste - Pastes the item that was cut or copied.
Clear - Removes a selected item in topsOrtho.
Select All - Selects everything in a document.
Find - Finds a word or phrase.
Spelling - Check the spelling of your document.
Spelling and Grammar - Check the spelling and grammar.
Substitutions - Includes Smart Copy & Paste, Smart Quotes, Smart Links.
Transformations - Options for making upper and lower case and capitalization.
Special Characters - Unique characters that are on your computer

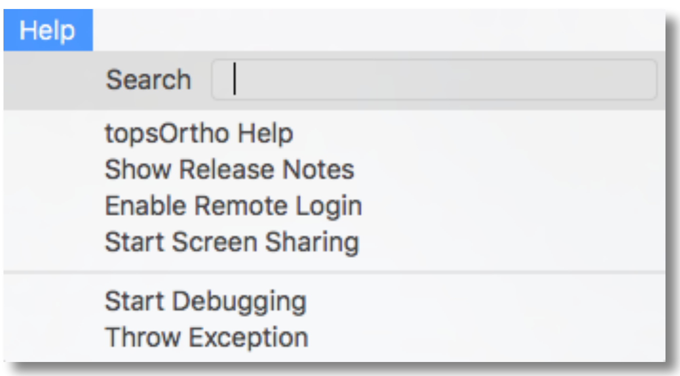
Figure 1-6: *Edit menu*

Window menu

Minimize - Places the window on the dock.
Save Window Size - Resize a window and saves the size.
Restore Default Size - Restore the window to its original size.
Bring All to Front - Brings all windows of an application forward.

Figure 1-7: *Window Menu*

Help menu



Search - Type in a topic.
topsOrtho Help - Contains topsOrtho support info.
Show Release Notes - Displays topsOrtho Release Notes.
Enable Remote Login - This begins the screen sharing process with tops Customer Support.
Start Screen Sharing - Use when sharing your computer with topsOrtho support.
Start Debugging - DO NOT USE - topsOrtho support only.
Throw Exception - DO NOT USE - topsOrtho support only

Figure 1-8: *Help Menu*

topsOrtho Release Notes lists any changes that have been made to your system after an update. They appear when you click Show Release Notes, and also the first time that topsOrtho is launched after an update. Please take the time to review the notes as they are very informative. If you want to view them later, they are always located at topsOrtho Help.

1D Screen sharing through Help menu

If you need assistance with any part of topsOrtho and have an active support agreement, you can screen share with tops Customer Support. This enables us to see your screen and resolve your problem. After you call, click on the Help Menu and follow the Customer Support rep's instructions.

Getting help from tops Customer Support:

1. Call tops support: +1 (770) 627.2527.
2. If screen sharing is required, from the topsOrtho menubar select Help.
3. Select Start Screen Sharing.

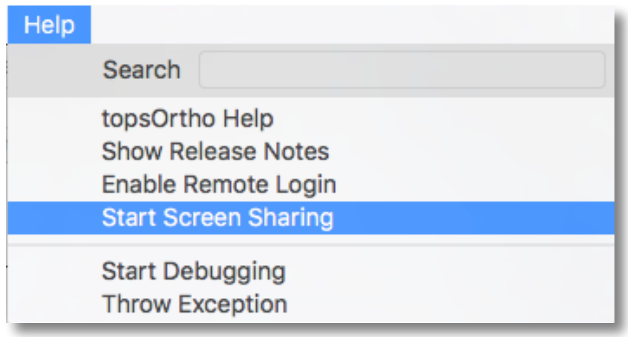


Figure 1-9: *topsOrtho Start Screen Sharing*

4. topsConnect will open and provide an ID and Password. Provide the numbers to the support team member to provide access to your computer.

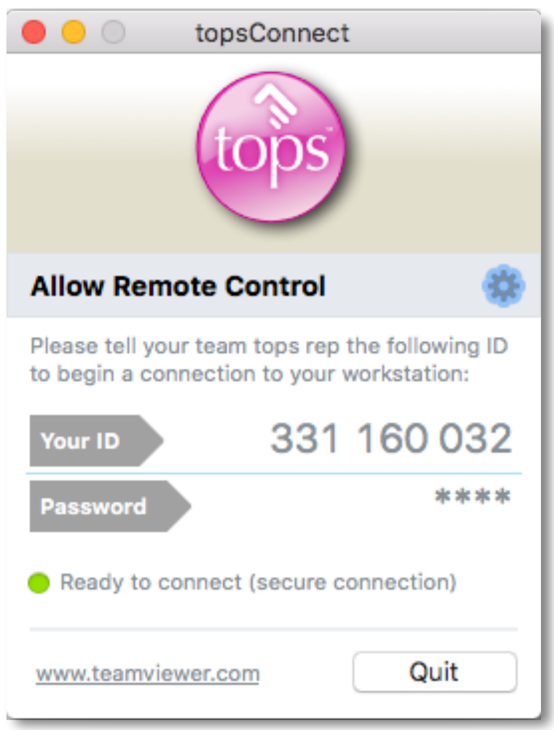


Figure 1-10: *Start Screen Sharing*

Summary

In this lesson, you should feel confident with:

- The Apple menu bar
- Opening the topsOrtho program
- Accessing keyboard shortcuts
- Obtaining the correct version and build of topsOrtho
- Recognizing topsOrtho menus

Lesson 2 Customizing with the topsOrtho Menu

Lesson Two Overview

This lesson focuses on customizing seven main options of topsOrtho.

Objectives:

To start customizing topsOrtho you will:

2A Open topsOrtho menu

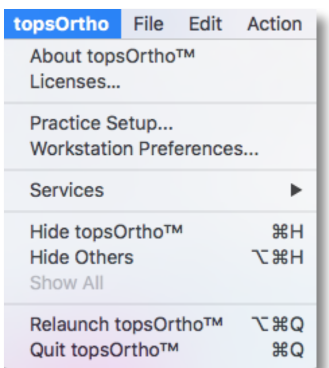
The menu items discussed are:

- Information
- Defaults
- Labels
- Locale/Format
- Fee Schedule
- Web
- topsCheck-In

2A Customizing topsOrtho Menu options

In this section we will review a limited number of topsOrtho customization features, with the balance covered in future lessons. To customize the way topsOrtho works in your practice, open the Practice Setup menu item. You must have the proper security permissions, as it requires a password.

To open Practice Setup, you must have the correct security permissions, and a password is required.



About topsOrtho - Displays version number.
Licenses - Displays current users and licenses.
Practice Set up - Modifiable menu about your practice.
Preferences - Customize your workstation.
Services - Allows access to additional tops Software programs.
Hide topsOrtho - Hide program from desktop.
Hide Others - Hide other programs from the desktop.
Show All - Display all programs on the desktop.
Relaunch topsOrtho - Relaunches the program.
Quit topsOrtho - Shut down the program.

Figure 2-1: *topsOrtho menu*

To open Practice Setup

1. From the tops menu, select ***Practice Setup...***
2. Enter your topsOrtho ***password*** and click ***OK***.

Information

The information window allows you to verify practice information that will be pulled into internal placeholders and set up your mail server if you plan on emailing statements. If any of the information in this screen is incomplete or incorrect, contact tops Customer Support at +1 (770) 627-2527 to make changes.

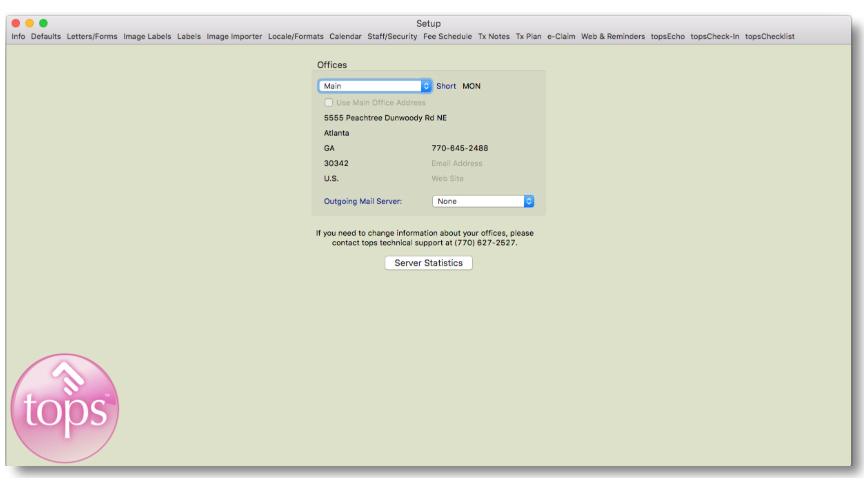


Figure 2-2: *Info window*

Defaults

The Defaults window contains information pertaining to financials, statements, appointment reminders and appointment slips. This information affects new accounts and is typically a one-time setup.

Figure 2-3: *Defaults*

Minimum Late Payment Fee - The minimum fee charged if payment is late.

Late Fee Percentage - The percentage amount of the outstanding charges you charge a patient if his payment is late. If you enter both a minimum late payment fee and a late fee percentage, topsOrtho will apply the higher amount to the statement.

Last Day Statements Cover - Which day do you want to be the last day in a billing cycle? You can modify this for individual patients if needed. This is also the day of the month you want statements generated.

Statement Frequency - How do you want your statements generated in topsOrtho?
- **Due Now >0** - Any past due amount will generate a statement. No future dues will be displayed on the statement.
- **Contract or Due Now >0** - Any amount due will generate a statement, but only if there is a contract or money is now due. Accounts with a credit will not receive a statement unless there is a contract. Future dues will be displayed on the statement.
- **Always** - A statement will generate, regardless if any money is owned or credited.
- **Never** - A statement will never be generated, regardless if any money is owed or credited.

Min Bal to Charge a Late Fee - The minimum amount the patient must owe in order to charge a late fee.

Min Bal to Print a Statement - The minimum amount the patient must owe in order for a statement to generate.

Appointment/Recall Reminders - Check default preferences, Email, Fax, SMS, Voicemail.

Initial Fee - The normal initial fee charged by your office.

Periodic Contract Fee - The most common monthly charge.

Extended Tx Per Visit Fee - The most common fee charged per visit over standard treatment length, regardless of when the patient has appointments.

Extended Tx Per Month Fee - The most common fee charged per month over standard treatment length, regardless of then the patient has appointments.

Broken Retainer Fee - The most common fee charged for a broken retainer.

Apply Late Fees on Statement to Non-Contract Patients - Patients that do not have a contract will be charged a late fee if the account is past due.

Show Late Fees on Coupons - Both the amount due now and the past due amount will appear on payment coupons. Coupons show monthly payments if paid by grace days and include the late fee if after the grace days.

Send Statement to Auto-Pay Accounts - Check if you want to send billing statements to Auto-Pay accounts.

Reminder for Next Appointment - Check if you want the next appointment to display on the Appointment Slip.

Reminder for Today's Payment - Check if you want the payment to display on the Appointment Slip.

Excuse for Today's Appointment - Check if you want an excuse to display on the Appointment Slip.

How topsOrtho generates statements

The following example gives you a better understanding of how statements are generated in topsOrtho:

Charge Date = 1 (the first day of the month)
Grace Days = 13 (number of days)
Statement Date = 15 (the 15th day of the month)
Last Day Statements to Cover = 15 (the 15th day of the month)

Take the Charge Date (1) + Grace Days (13) + 1 day for rollover = Date the late fees will charge, at the VERY END of the day (15th at midnight). The statements (including late charges) will be ready to print the morning of the 16th, but will be dated the 15th.

Labels

Labels give you the flexibility of adding, deleting and editing many of the labels that are used throughout topsOrtho. When you select a label category with the drop down arrow, click on the category that you would like to edit. If you are able to add or delete, the plus and minus symbol will be available on the bottom left of the window. If these symbols are grayed out, you may not add or delete an item.

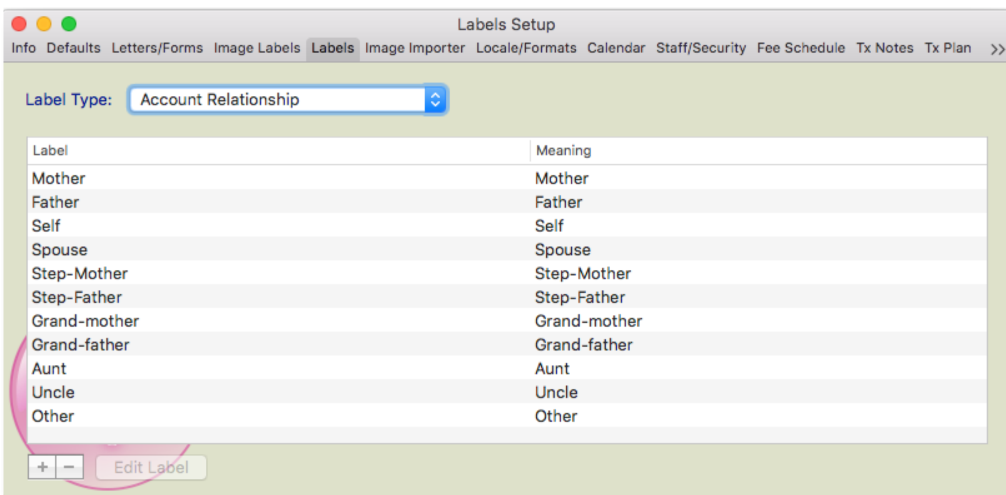


Figure 2-4: *Labels*

If you add or change a label, it is not necessary to add the meaning. The meaning is only used in topsOrtho to let you know the definition of the label. If you add a label, you already know the meaning.

Please DO NOT change the Treatment Status labels. They are used for reporting purposes.

Locale/Format
You can customize telephone formatting and specify the location of your practice for date and time formatting. You must also set the computer's location correctly. This is located under System Preferences, Date and Time. Click on Open International, select Formats, and choose your country.

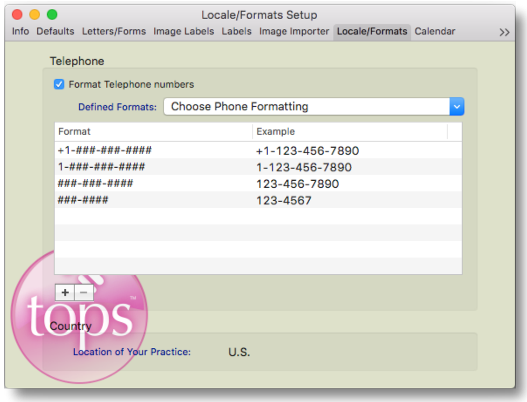


Figure 2-5: *Locale/Format* Fee Schedule

The Fee Schedule allows you to add transactions that you use in your practice. Transactions added to a patient's ledger are chosen from this list. You can add or modify–but not delete–any of the items on the list. You can also select Account Transaction Types to Exclude from Insurance Claims, where applicable. You will be asked for a security password.

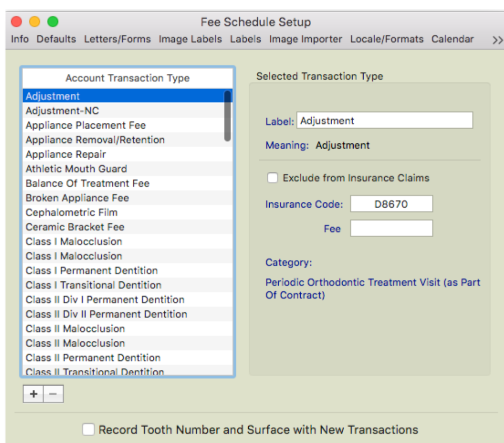


Figure 2-6: *Fee Schedule*

Account Transaction Type - List of all items for which your office charges a fee, including administrative fees.

Selected Transaction Type Label - Name of the new transaction.

Meaning - Insurance claim form definitions.

Exclude from Insurance Claims - Transactions to exclude from claims, e.g., Miscellaneous, Electric Toothbrush, Late Payment Fee, etc.

Insurance Code - Displays an insurance code, if applicable. You may not want to change this code unless insurance dictates, as claim forms are generated with the appropriate codes displayed. Only modify if the codes in your area are different.

Fee - Enter the fee, if it is applicable. This will display on a new transaction.

Web & Reminders Set up
This window allows you to integrate with third party integrations. Your user name and password are provided by these companies.

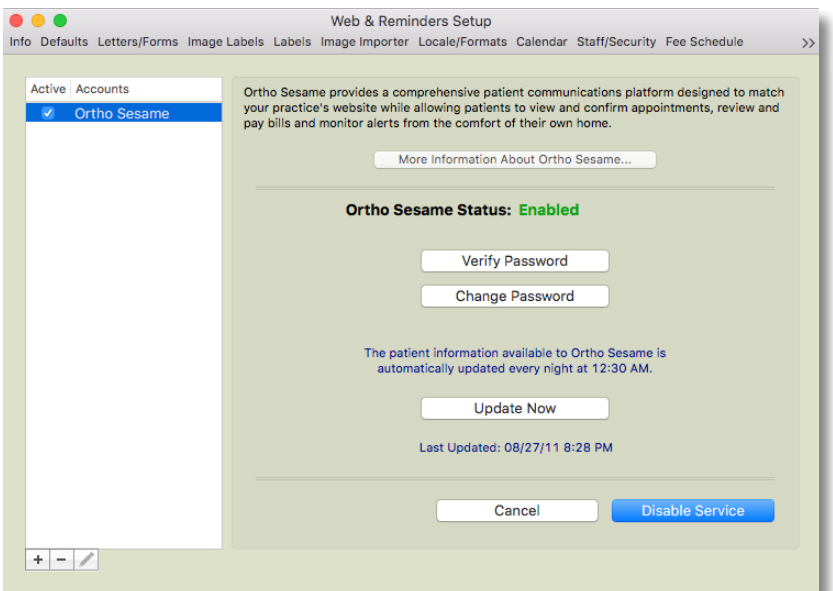


Figure 2-7: *Web & Reminders*

topsCheck-In

This window allows you to customize your check-in screen, including greeting, patient instructions, and language.

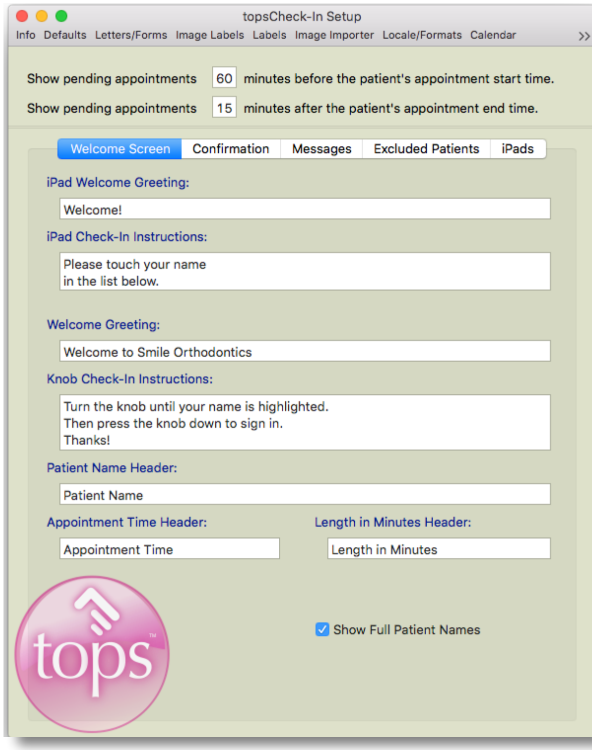


Figure 2-8: *topsCheck-In Welcome Screen*

Welcome Screen

iPad Welcome Greeting - What do you want to say at the top of the patient check-in screen?

iPad Check-In Instructions - Customize patient instructions for iPad.

Patient Name, Appointment Time, Length in Minutes headers - Displays as column headers.

Show Full Patient Names checkbox - Uncheck the box to display the patient's first initial of their first name and first three initials of their last name.

Confirmation

You can create customized instructions for confirmation when checking in.

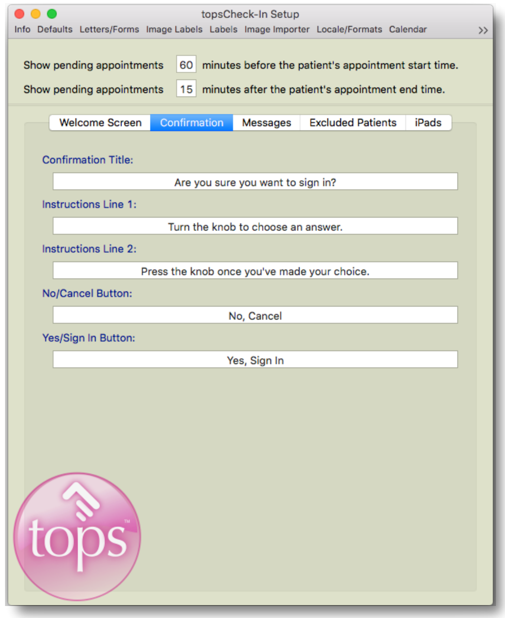


Figure 2-9: *topsCheck-In Confirmation*

Messages

This window allows you to customize greetings and messages for your patients. Messages will display in the language that you've selected in the Patient Information window. You can choose placeholders by clicking the drop-down arrow to the right of the placeholder item.

Figure 2-10: *topsCheck-In Messages*

Patient Greeting - You can modify the greeting according to your office preferences.

Early Message - Displays a message if a patient is early. You can select how much time is “early” and give the patient instructions.

Late Message - Displays a message if a patient is late. You can select how much time is “late” and give the patient instructions.

See Receptionist - Displays upon patient check-in if you have checked Requires Staff Attention in the Appointment Confirmation window.

Be Seated - Customize this message according to your office protocol.

Universal Notification/Information - Once checked in, reminds your patients of information specific to your practice (e.g., an upcoming open house, no cell phone policy, etc.)

Excluded Patients

Excluded Patients in topsOrtho is used to hold open specific chairs or times within your practice. For example, create a patient and name it Practice Patient. This patient can be used to block out times on your schedule if a staff member is absent for a portion of the day. This patient should be on the Excluded list, as you do not want the name visible on Patient Flow. If you use this, you will never be able to mark such an appointment as Completed. The appointment will always be listed as Pending in the Patient Information window.

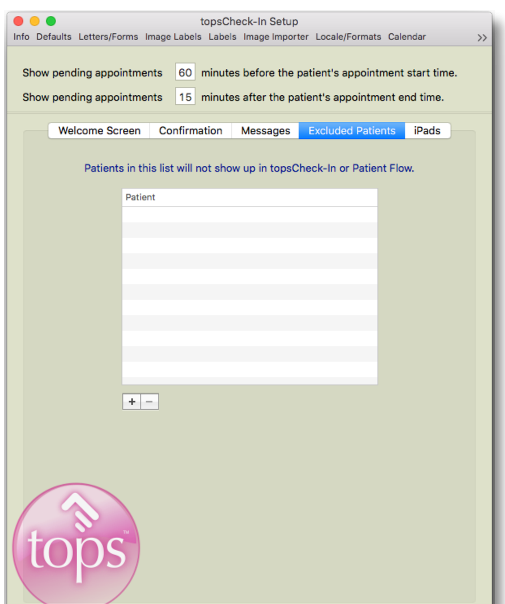


Figure 2-11: *topsCheck-In Excluded Patients*

Add a New iPad

Follow the instructions shown in the window to pair any iPad with your topsServer and use it as a check-in station.

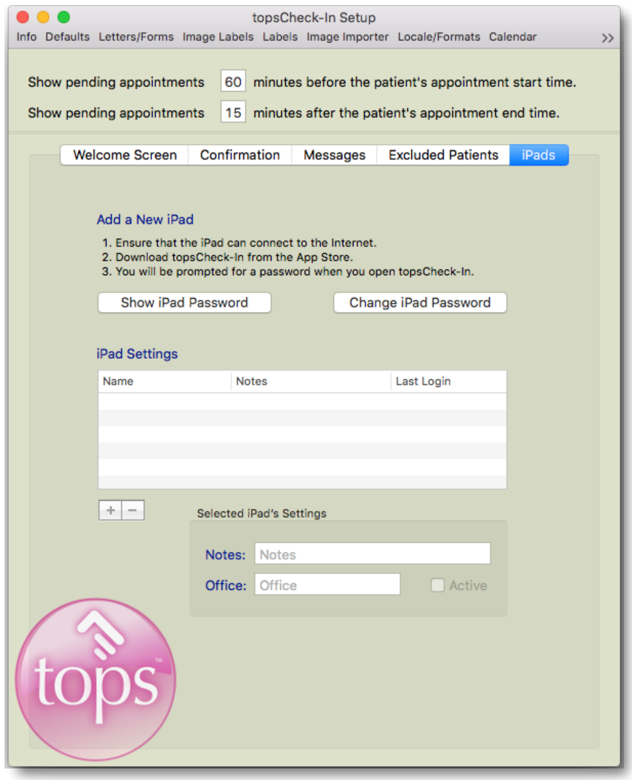


Figure 2-12: *topsCheck-In iPads*

Summary

In this lesson, you should feel confident with:

- Customizing topsOrtho using the topsOrtho Menu option

Lesson 3 Starting the Day with topsOrtho

Lesson Three Overview

This lesson focuses on the Patient Flow and Appointment Book features for existing patients.

Objectives:

To start the day with topsOrtho you will:

3A Start of Day duties. What topsOrtho does automatically
topsOrtho automatically performs the majority of duties usually associated with the start of the day, such as posting automatic payments, rolling contract charges and changing the date.

3B Learn how to open and manage Patient Flow
Patient Flow should be the first item that you open in topsOrtho each morning. This chart displays the patients that are scheduled for today. This window should remain open all day, in the clinic as well as the front desk.

3C Learn how to open the Appointment Book to schedule patients
The Appointment Book is the second window that you'll open in topsOrtho each morning. The Appointment Book allows you to manage all appointments in topsOrtho, from creating to rescheduling.

3D View Missed Appointments
topsOrtho has a list that allows you to see who missed an appointment for a specific date range. This list displays the patients that you need to call and reschedule.

3A Starting the Day - What topsOrtho Does Automatically

There are many things that go on behind the scenes with topsOrtho. We refer to these activities as “rollover.” Rollover handles things related to the passage of time:

- Advance the calendar
- Marks appointments as missed if the patient did not checked in
- Adds a recall for all patients who missed their appointments today
- Charges contract fees
- Generates insurance claims
- Records automatic payments
- Sends data to your website if you use T.LINK or Sesame
- Deactivates contracts that have been charged fully
- Charges late fees
- Generates statements
- Generates the daily backup file

Rollover is essentially invisible, but it is a critical part of topsOrtho that handles all of these necessary tasks for you.

3B Opening and Managing Patient Flow

Keyboard Shortcut
Command + Shift + F

This is the first window that you should open each day in topsOrtho. Patient Flow allows you to track patients that are on the schedule. If you have a patient check-in monitor, the patients can check themselves in when they arrive at the practice. If you elected not to have a check-in station, you can change the status of the patient when they check in at the front desk. Once you change the status, the clinic will be notified that there is a patient ready to be escorted back for treatment.

Upper Section

Middle Section

Lower Section

Figure 3-1: *Patient Flow*

Patient Flow Upper Section

This part of the window varies depending on which view you have selected.

View drop down menu

You can change the view of the Patient Flow window to show All, Reception, Treatment Coordinator, Missed or Clinical.

Doctor drop down menu

If there are multiple doctors, you can select which doctor's patients are visible on Patient Flow.

Summary

Indicates how many patients are Coming, Late, Waiting, Seated, and Done.

Add Chair button

Adds a chair to Patient Flow. Adding a chair does not affect the Appt Book.

Main drop down menu

If you have more than one office, you can select the office that you are currently working in or check the appointments in a satellite office.

Waiting to be Seen

Grouped images in the Reception View, patient is checked in and ready to be seen.

Ready to Check Out

Grouped images in the Reception View, patient is checked out and ready to have their next appointment scheduled and then marked as Checked Out.

Patient Flow Middle Section

Col

Column the patient is on in the Appointment Book.

Patient Name

Patient's name, click the double arrows to open contextual menu and jump to Patient Info section.

Status

Click the double arrows to change the status of a patient in your office. The default selections are Coming, Missed, Waiting, Seated, Done, and Checked Out. The assistant's initials will display once selected from the list.

HX

Will display a red rectangle, if patient has a Medical History Alert.

Open Checklist

Will display the number of open checklists. Double click the number to open the patient's checklist tab.

Approved Checklist

Will display the number of approved checklists. Double click the number to open the patient's checklist tab.

Dr/Asst

Initials of Dr. and Assistant (the assistant's initials are shown after patient is seated).

Procedure/Appt time/Length/Arrived/Waited/To Go

All pertain to the scheduled appointment and the amount of time spent in your office.

Patient Flow Lower Section

Financial Information

Current financial information, if applicable.

Med Hx/Financial/Schedule Alerts

Displayed from the Patient Information, Status Notes, Alerts Tab.

Next Procedure

When treatment notes are added to a patient, they are automatically displayed in this area. Or click the double arrows to add.

Add Transactions button

Click to add financial transactions.

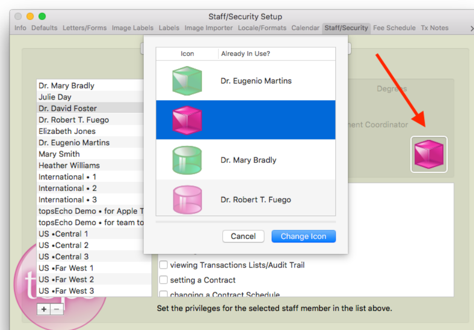
Search for Next Appointment button

If Next Appointment Information is entered, you can search for the patient's next appointment.

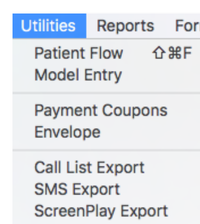
Make Recall button

If your patient cannot schedule an appointment you can create a recall.

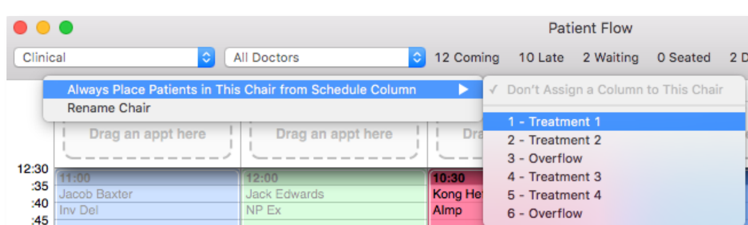
3C Set up Patient Flow



1. Open Practice Setup → Staff/Security Set up, select the doctor and click inside the small outlined box.
2. From the drop-down sheet, choose the Doctor Patient Flow ready indicator icon. Close Practice Setup.
   These are the only icons available and only doctors can choose icons.

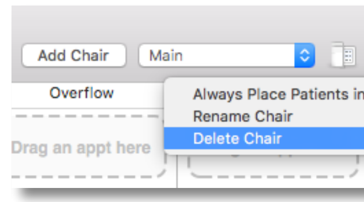


3. Open Patient Flow, from the topsOrtho menu, go to Utilities → Patient Flow, or use the shortcut Shift + Command + F.
4. Rename the chairs in Patient Flow. Select Clinical view and click the double arrows to the left of the column header.
5. From the drop-down menu select Rename Chair and enter the chair location. Do this one time only, for each chair.
   ALWAYS rename the chairs to the actual, physical location. The appointment book column name is the initial default, you must rename the chairs.
6. Lock chairs when patients are ONLY seen in a specific chair (i.e. New Patient Exams) from a specific Appointment Book column.



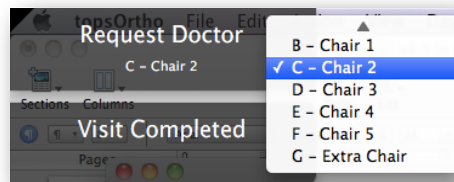
Lock by clicking on the double-arrows and select Always Place Patients in This Chair from Schedule Column. From the drop-down menu select the appropriate Appointment Book Column.

7. To add chairs select the Add Chair button. To delete chairs select the last chair column and click the double-arrows and select Delete Chair.



   You can only delete the outermost chair. Adding or deleting chairs in Patient Flow does NOT affect the Appointment Book.

8. Set up the Hot Corners, per clinical workstation. Hot corners make it quick and easy to call the doctor and dismiss the patient. Swipe the mouse cursor to the upper right or left, click the double arrows, and choose your clinical chair, where the workstation is located.



   Typically, you will set this up one time, because a workstation stays at a specific chair. If this is not the case for your office (e.g. you take laptops with you to satellite offices) you need to to set up when you change locations.

3D Utilizing Patient Flow

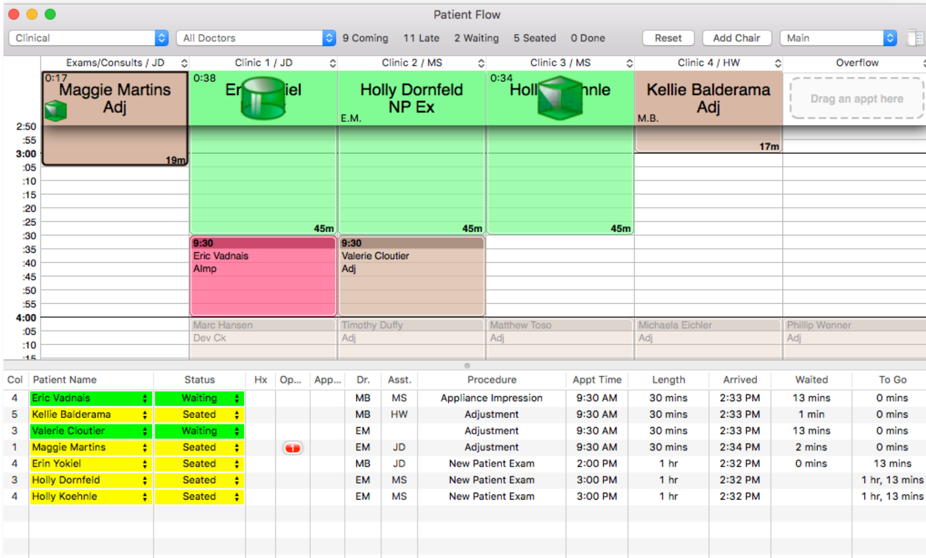
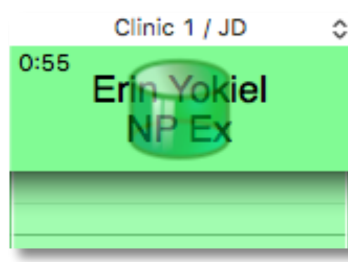
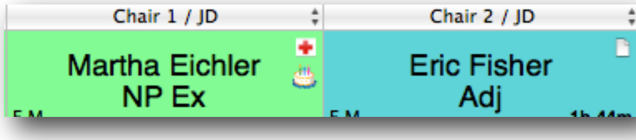


Figure 3-2: *Patient Flow Window Clinical*

1. After the patient is checked in, they will be shown as Waiting and the appointment will be in color (not muted) on the Schedule in Patient Flow.
2. To seat the patient, drag and drop the appointment into the appropriate chair. Remember, Patient Flow is designed so you always can see who is ready, who is waiting, and who is coming up next.
3. Select the assistant from the pop-up menu, the assistant's initials will show next to the Chair name (i.e. Chair 2/HR).
4. Right click and select Request Doctor or flick your cursor up to one of the hot corners and select Request Doctor. The doctor's icon will appear.
   What the icons mean:
   - Large, blinking or revolving icon is the where the doctor needs to go first
   - The icon begins revolving after 1 minute
   - More than one doctor, means there will be more than one icon
   - Other patients waiting for the doctor will display a minimized icon, it will enlarge and blink or revolve when they are next in line for the doctor
   - To cancel swipe to the upper left and tap Cancel Request
   - You can also right click to call or cancel request
   - Other smart view icons which appear when you have seated your patient include:
     - birthday cake = the patient has a birthday 30 days before/after today's date
     - white paper = financial alert
     - red cross means = health history alert



5. When the doctor is at the chair, simply swipe the cursor to the upper left again and tap to Cancel Request. This will trigger the next waiting patient's icon to call for the doctor.



You can also right click on a patient's appointment to view the contextual menu or click the double-arrows in the appointment list at the bottom of the window. There's always more than one way to do something in tops!

6. Double click the appointment to go directly to the Treatment Notes.
7. To dismiss your patient, simply swipe to the upper right and tap Visit Completed and one more tap to confirm and Dismiss Patient.
8. Your Patient is now marked as Done and is visible in the Reception View and ready to be check out.
9. To check out the patient, the front desk staff will click the patient's image or click their name in the list and the Drawer will open. The front desk staff member can process transactions, search for and schedule appointments, or add recalls.
10. When a patient is ready to check out, from the middle section (list of names) under the Status column, click the double arrows and select Checked Out.

Middle Section

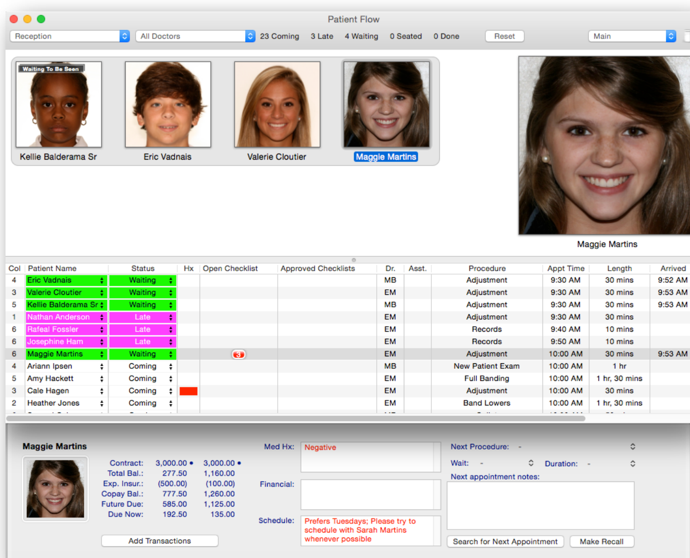


Figure 3-3: *Patient Flow Reception Window*

3E Opening the Appointment Book

The second item you should open at the start of the day is your Appointment Book. This displays the patients that have appointments for today as well as in the future. You can display the appointments in a daily or weekly view and use specific tools to navigate. There are several ways to create an appointment. Each will be discussed later.

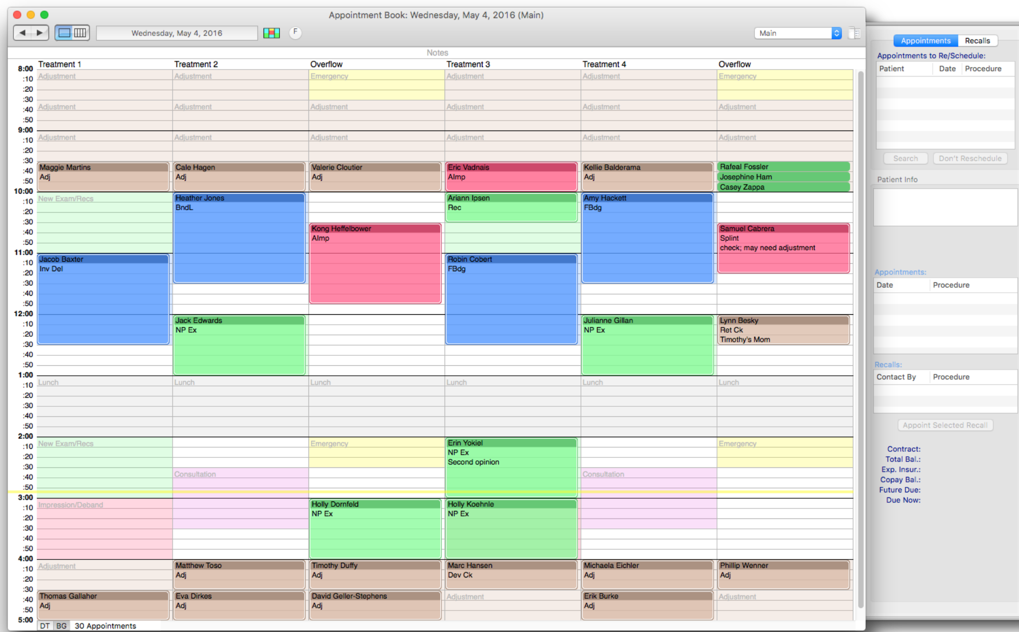


Figure 3-4: *Appointment Book*

Opening the Appointment Book

1. From the tops menu, select Day.
2. Select Appointment Book.

Keyboard Shortcut
Command + B

Navigating through the Appointment Book

The upper part of the Appointment Book allows you to navigate through your schedule and to select other options.

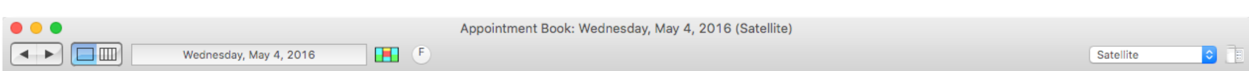


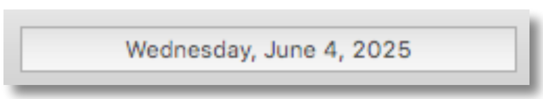
Figure 3-5: *Appointment Book Navigation Options*

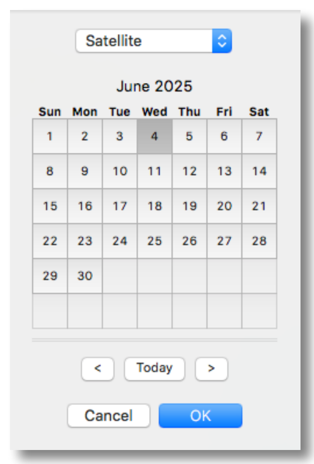
Arrows

The arrows move you through the schedule day-by-day.

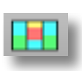
Schedule View
Switch your Appointment Book from a day or a week view.

Day/Date View
Clicking the date displays a calendar. From this calendar you can select any day you need to view, past, present or future.
Press the Down Arrow key on your keyboard to go back to today.





Template Selector

 This allows you to choose a template to apply.

Filter

Clicking the Filter button allows you to select the doctor whose appointments you would like to display. (This only applies to practices with more than one doctor.)

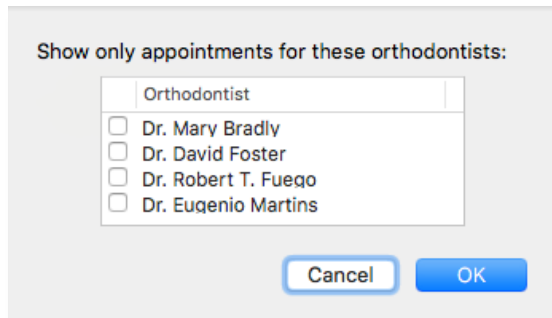


Figure 3-6: *Filter Options*

Office Location

Clicking the arrows allows you to select the office for which you want to view appointments.

Drawer

Clicking this icon opens/closes the Information Drawer on the Appointment Book. When you select a patient from the calendar, the drawer will display information about that patient. A **bolded** appointment represents today.

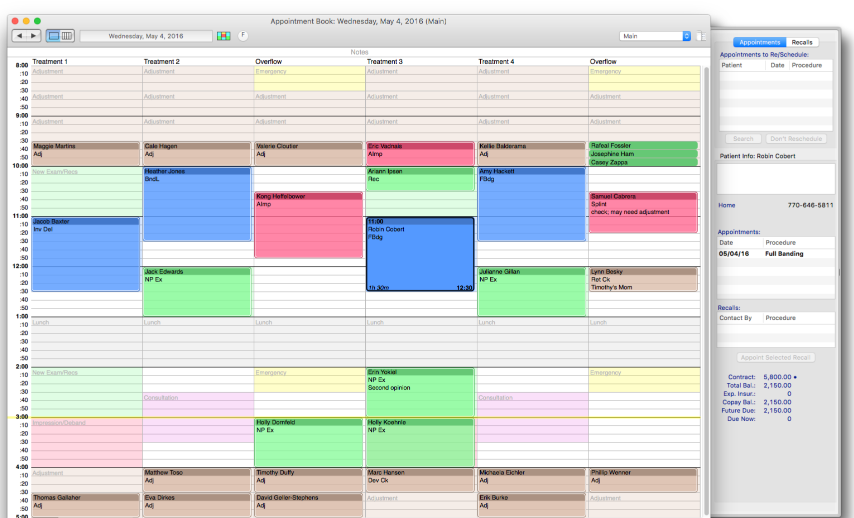


Figure 3-7: *Appointment Drawer*

Schedule Options

Clicking and holding the mouse, or right-clicking, on a patient's appointment displays contextual window options for that patient.

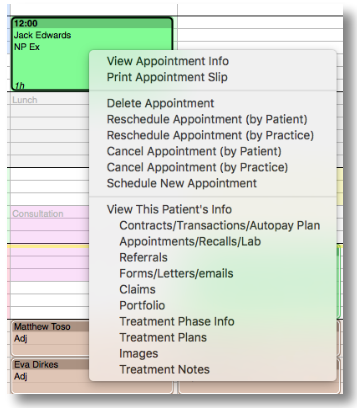
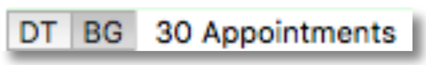


Figure 3-8: *Patient Options Shortcut*

DT (Doctor Time)



Clicking the DT icon will show/hide the doctor time to the left of the Appointment Book.

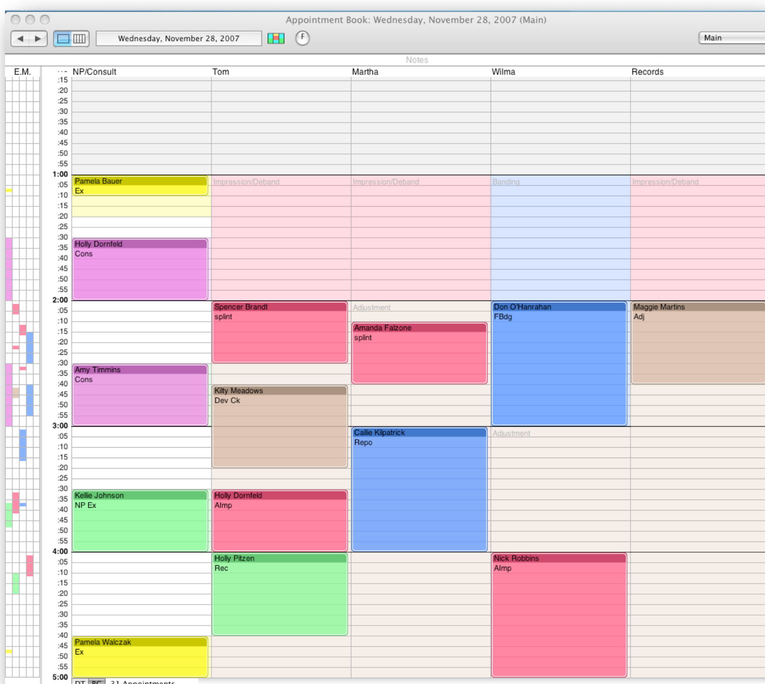
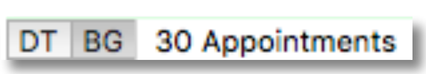
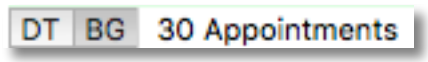


Figure 3-9: *Doctor Time Displayed in Appointment Book*

BG (Background)



Clicking the BG icon will show/hide the template background.

Number of Appts 

Displays the number of appointments for the day.

3F Viewing Missed Appointments

The third item that should be performed at the start of each day is viewing Missed Appointments. This list shows the patients that missed appointments for a specific day or a date range. With this information in hand, you can easily reschedule patients. After rollover, the Patient Information window will reflect the number of appointments the patient has missed.

Viewing Missed Appointments

1. From the tops menu, click Matrix.
2. Click Appointments.

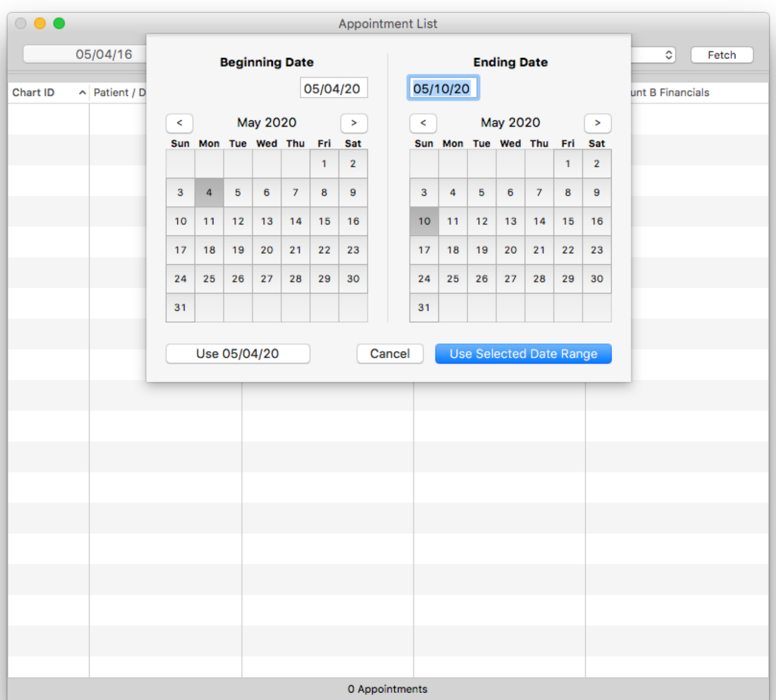


Figure 3-10: *Missed Appointment Date Range*

3. Select the Day (e.g.,yesterday) or a Date Range.
4. Click Use Selected Date Range. A list of appointments is displayed.
5. Click the first drop-down arrow (the box may show Scheduled).

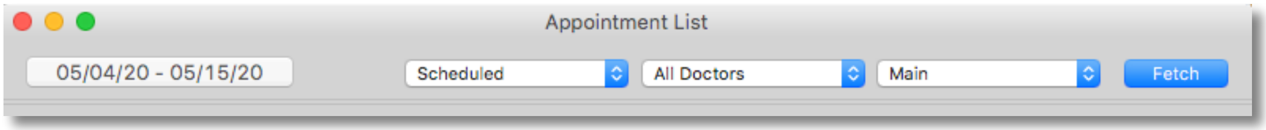


Figure 3-11: *Appointment Options*

6. Click Missed.

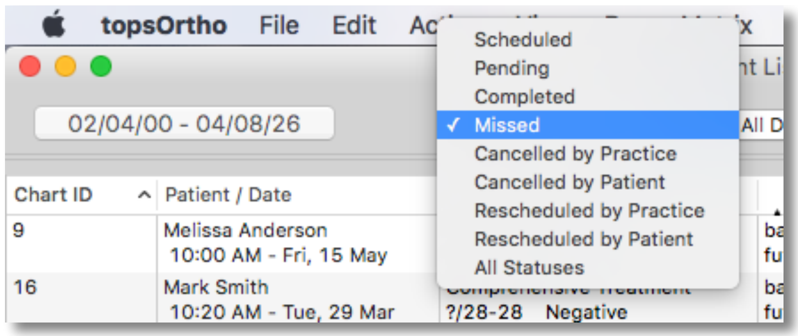


Figure 3-12: *Missed Criteria Selected*

7. Click the Fetch button to compile the list.

Viewing Telephone Numbers for Rescheduling
Any column with a triangle to its left can display a different header. Just click on the tri-angle and select a header from the list.

1. Select the Triangle to the left of Account A Financials, a contextual menu is displayed.

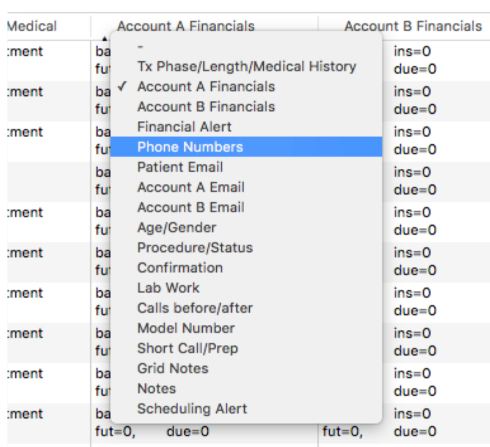


Figure 3-13: *Selecting Column Headers*

2. Click Phone Numbers. The list will show patients' telephone numbers.

Rescheduling appointments will be covered in Lesson Four.

Summary

In this lesson, you should feel confident with:

- Understanding topsOrtho automatic “rollover”
- Opening and understanding functions of the Patient Flow Window
- Opening and understanding sections of the Appointment Book
- Opening and customizing the Missed Appointment List

Lesson 4 Appointment Management

Lesson Four Overview

This lesson focuses on managing appointments. There are several ways to make appointments in topsOrtho and each one will be discussed. Also included in the lesson is rescheduling, canceling, tracking recalls and creating lists.

Objectives:

To manage the appointment book, you will

4A **Create Appointments**
There are several ways to create appointments within topsOrtho. Each will be discussed, along with examples of how you can use them.

4B **Manage Appointments**
Rescheduling and canceling appointments is an ongoing process. topsOrtho allows you to perform these tasks easily and efficiently. We will also discuss recalls and tracking your appointments with the use of lists.

Note: When entering information in a field within topsOrtho, use the ***Tab*** key on the keyboard to advance to the next field.

Use the ***Enter*** key to indicate that you are finished entering information in a window. You can select the blue button, or just press Enter.

4A Creating Appointments
There are several ways to schedule appointments in topsOrtho. Once you learn the different methods, you can decide which to use for any specific instance. The first way, using the search feature, is discussed below.

topsOrtho will not allow you to overlap appointments in the same column.

Scheduling Appointments - #1 - Appointment Search Window
The Appointment Search window offers the flexibility to refine your search any way you need. It's a quick way to search for an appointment if a patient calls you on the phone and needs to schedule a future appointment.

Appointment Search Window
This window can be accessed many ways in topsOrtho.

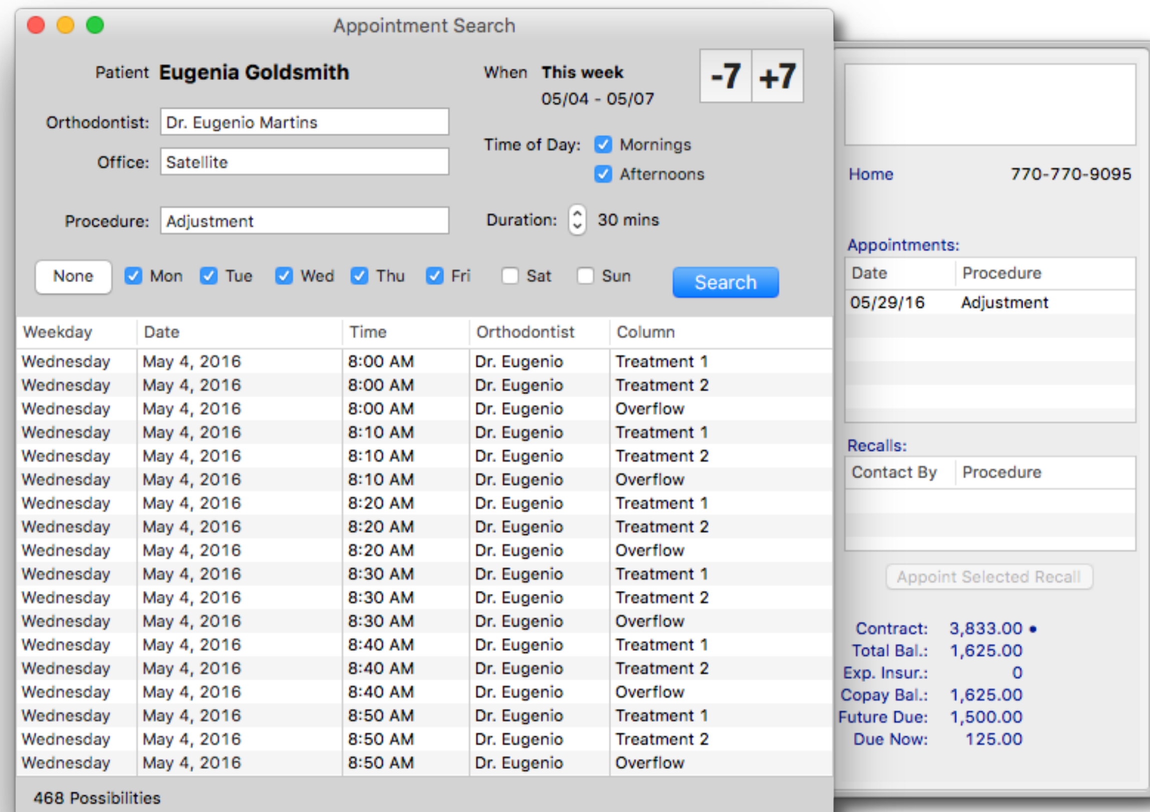


Figure 4-1: *Appointment Search window*

Opening the Appointment Search window:

1. From the tops Menu, click Action.
2. Click Make New Appointment.
3. Enter the Patient's name.

Keyboard Shortcut
Command + U

Always search for a patient's name by typing the first 3 characters of the first name and the first 3 characters of the last name. This will give you the most criteria to locate the name quickly.

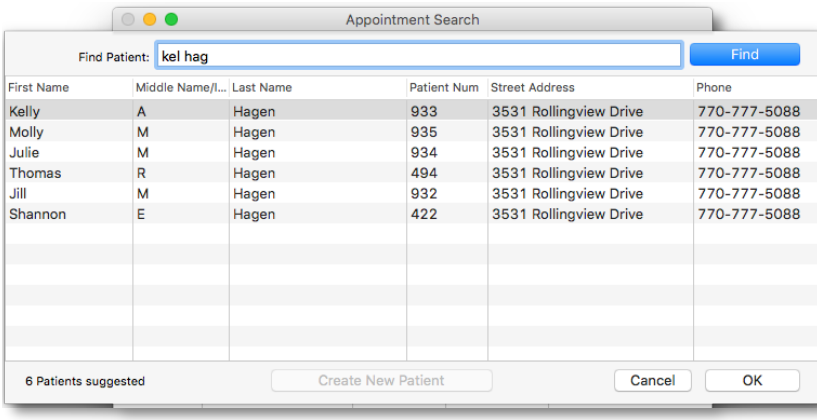


Figure 4-2: *Appointment Search for patient's name*

4. Click Find.
5. Click the Procedure Type and tab.

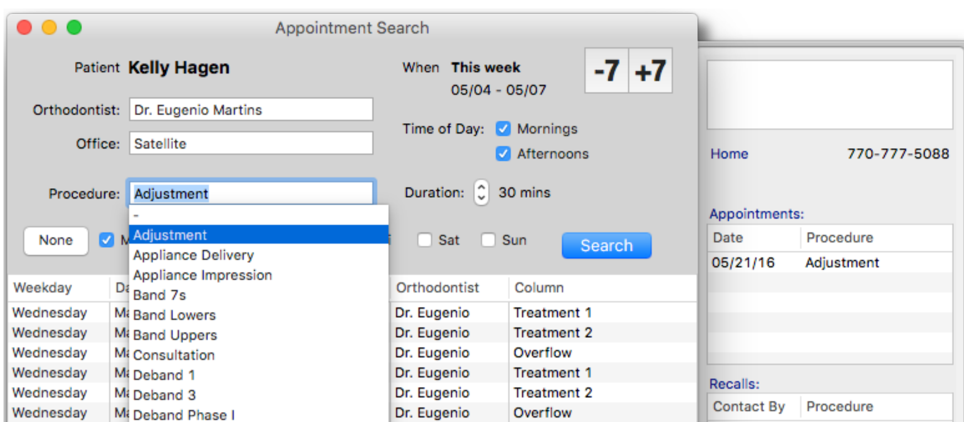


Figure 4-3: *Appointment Search Procedure*

6. Select the Search button to find the available dates and times.

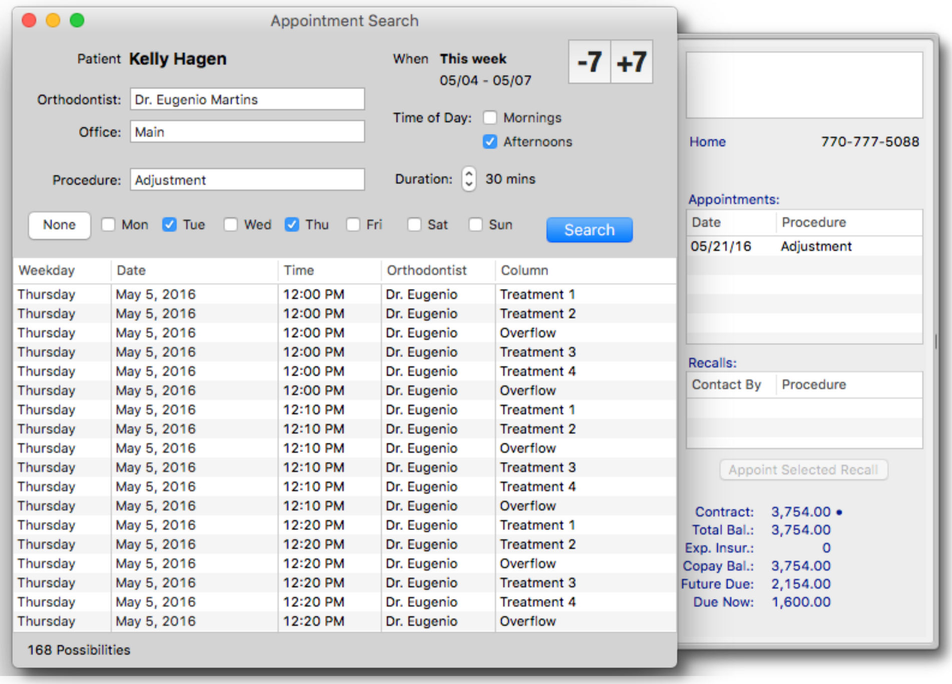
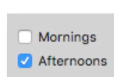


Figure 4-4: *Appointment Search Results*

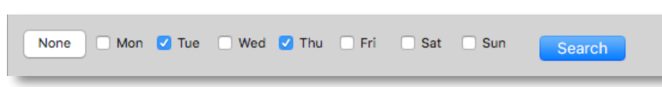
The upper part of the Appointment Search Window gives you the flexibility of choosing the search criteria that you need.

Click the appropriate icon to search forward or backwards one week at a time.

Select the appropriate timeframe.



Select the appropriate day(s) of the week.



Adding the Appointment on the Appointment Book

After finding the time you want, you need to add the appointment to your book.

1. Single click on the patient's preferred time. This will display a gray shadow indicating the time you have selected from the list.

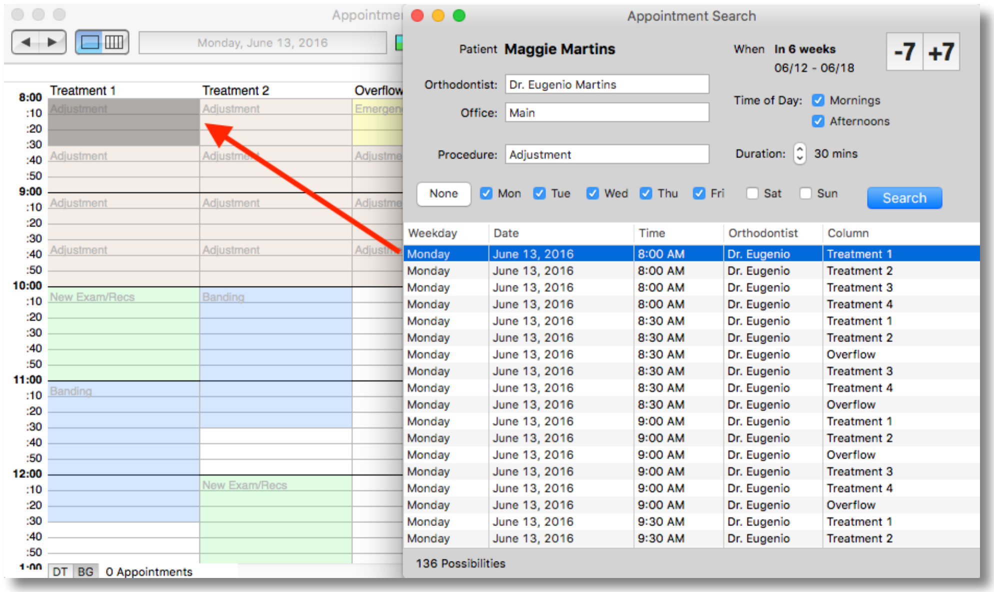


Figure 4-5: *Held Appointment*

2. Double click to set the appointment on the calendar. The Appointment Information window appears.

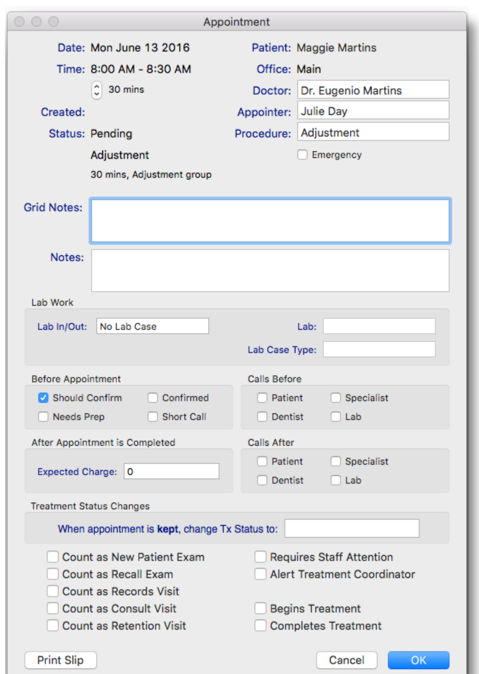


Figure 4-6: *Appointment Information window*

3. Add any information necessary.
4. Select OK**.** The appointment has been set and spotlighted to the book.

Appointment Information Window

The Appointment Information window contains information such as procedure type, lab work, whether the appointment needs prep, and if there are charges associated with the appointment. If the appointment is an emergency, it's important to check the appropriate box in the upper right corner of this window. This will be explained thoroughly in the Reports section. You can also print appointment slips for the patient from this window.

Appointment information may be automatically filled in according to the Practice Setup preferences. These preferences will be discussed in a future lesson.

Printing Appointment Slips

There are several places in topsOrtho from which you can print appointment slips for patients. If the Appointment Information window is open, you can easily print slips from there.

1. Click the Print Slip button on the bottom left. The appointment is spotlighted and the Print slip window opens.

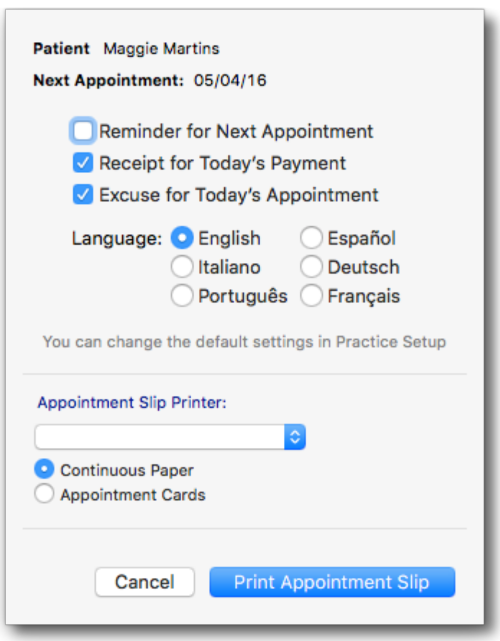


Figure 4-7: *Print Appointment Slips*

2. Select the type of slip you need to print.
3. Select Print Appointment Slip.


School/Work Excuse

Eugenio Martins, D.D.S., P.C.

1234 Main Street
Atlanta 30066
770-645-2488

Please excuse Savanna Lonsky, whose appointment was on Wed, Nov 28 and who left our office at 2:32 PM.

Thanks for understanding that some appointments must be scheduled during school or work hours.

Figure 4-8: *Appointment Slip Example*

4. Close any windows to display only the Appointment Book.

Scheduling Appointments - #2 Directly on the Appointment Book

Another way to schedule appointments is directly in the Appointment Book. Simply go to the correct day and in an open area of the calendar, click and drag the mouse. This is a good method to use if a patient has come in for an emergency and wants to wait to be seen.

1. Go to the correct day on the ***Appointment Book***.
2. Locate an appropriate open block of time.
3. Click and Drag over the amount of time necessary.

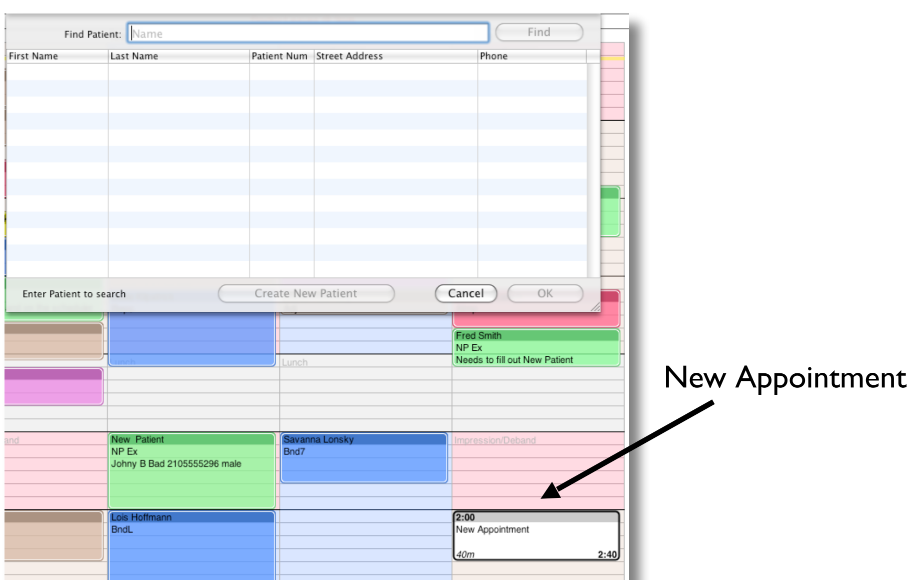


Figure 4-9: *New Appointment by Dragging*

4. Type in the patient's name.
5. Select Find.
6. Fill in the proper information on the Appointment Information window.

   If you dragged over a larger amount of time than an emergency appointment typically needs, a window will pop up to verify which timeframe you'd like.

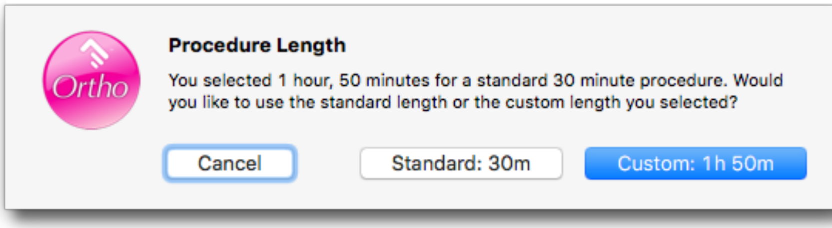


Figure 4-10: *Procedure Length Verification*

Scheduling Appointments - #3 From Patient Flow

The third way to create an appointment is through the Patient Flow window. Once the clinic has changed a patient's status to done, the treatment notes should already be entered. These notes will appear in the Patient Flow window and allow you to search for the next appointment.

Creating an Appointment from Patient Flow

1. Click on a Patient's Name. This will display treatment notes and next appointment date information on the lower right window. You do not have to ask the patient for this information.

Figure 4-11: *Patient Flow, Next Appointment*

2. Select Search for Next Appointment. The search window appears.

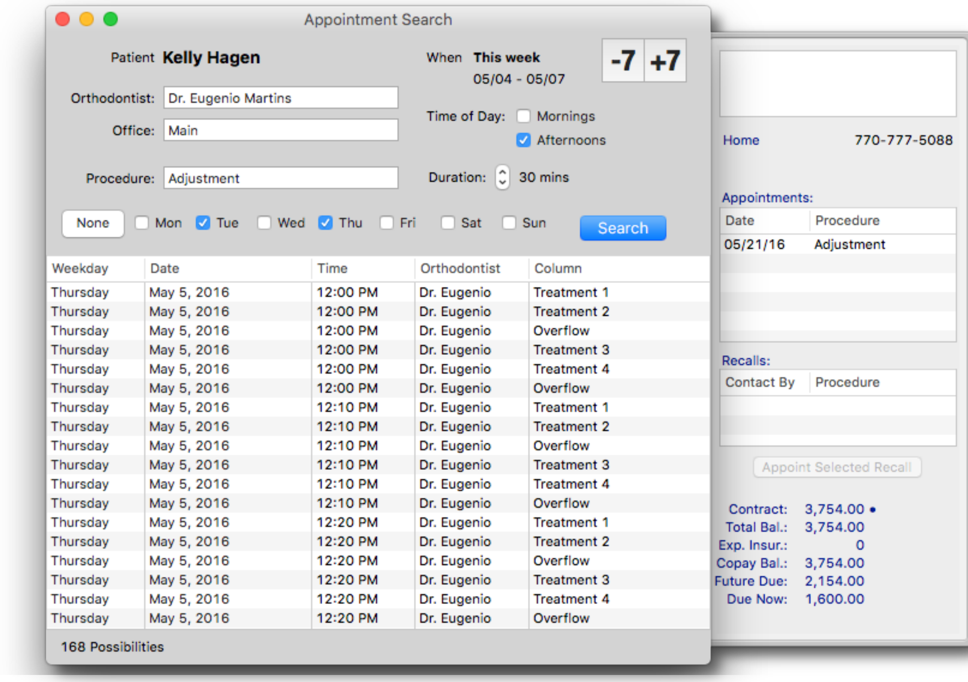


Figure 4-12: *Appointment Search Results*

The Appointment Search window is already set for the correct timeframe of 7 weeks based on the treatment notes from the Patient Flow window.

3. Choose the procedure type and Double Click on the Time.
4. The Appointment Information window displays the appointment.
5. Select OK to set and spotlight the appointment.

Scheduling Appointments - #4 from Patient Information

An appointment can also be made by using the Patient Information window. This window displays a patient's past and future appointments. We will focus more on this window a little later on; right now we'll only concentrate on the appointments section.

Scheduling Appointments from Patient Information

1. From the tops menu, select View.
2. Select Patient Info…
3. Search for the patient's name.
4. Select Find.

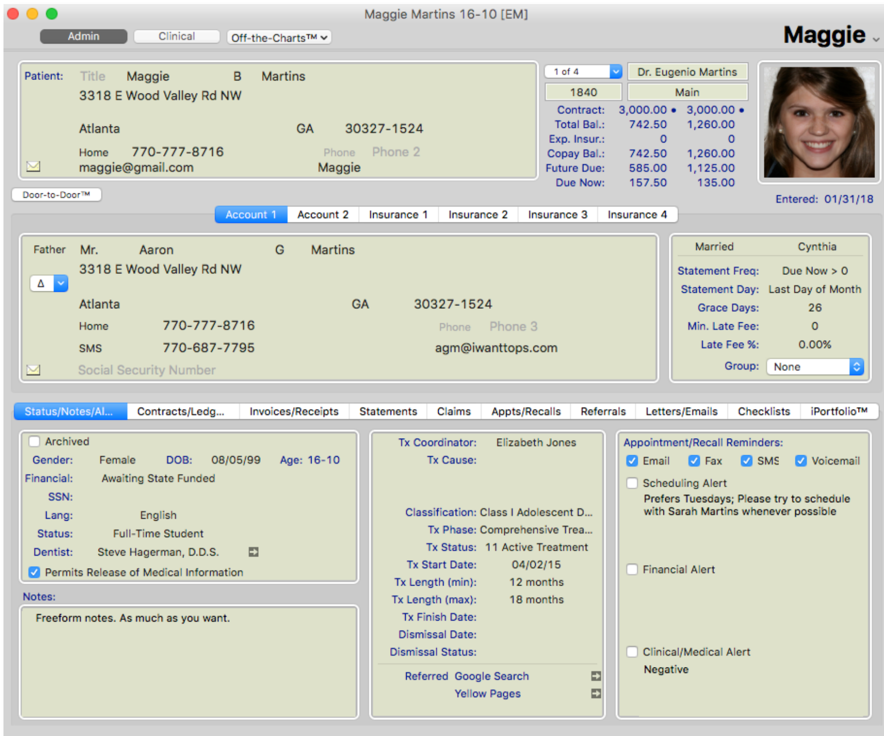


Figure 4-13: *Patient Information window*

5. From the lower section of the window, click the Appts/Recalls tab.

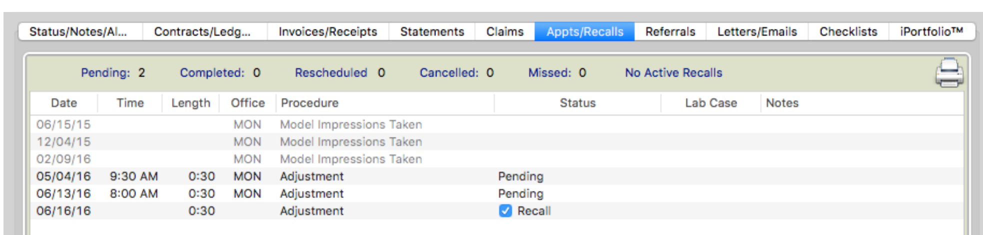


Figure 4-14: *Appointment ledger*

6. Double click on an appointment in the list.
7. The Appointment Book opens to the selected appointment and spotlights it.
8. Click and hold or right-click the selected Appointment. A contextual menu appears.

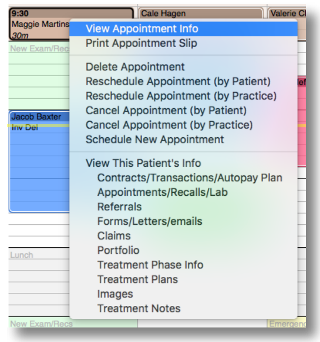


Figure 4-15: Contextual Menu

9. Click Schedule New Appointment.
10. The Appointment Search window opens.

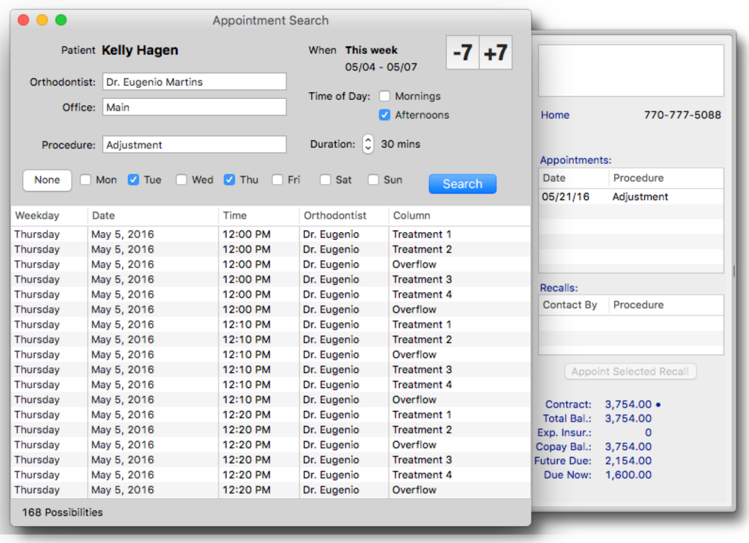


Figure 4-16: *Appointment Search window*

11. Modify the search criteria as necessary.
12. Click Search.
13. Double click to set and spotlight the appointment in the calendar.
14. Click OK in the Appointment Information window. The appointment has been added to the Patient Information window.

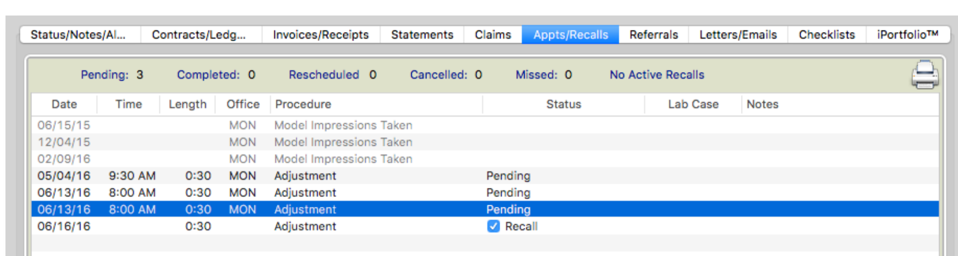


Figure 4-17: *Added Appointment*

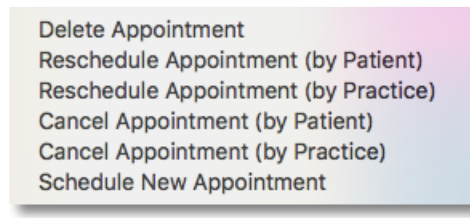
4B Managing Appointments

You have learned several ways to make new appointments. Managing these appointments are just as easy. We will discuss canceling, rescheduling, and tracking appointments. To track appointments, you will be introduced to both lists and reports.

Canceling Appointments

When you cancel an appointment, topsOrtho will ask for a little more information, which provides valuable data to the doctor. Was it cancelled by the patient or the practice? How many times has the patient cancelled a consultation?

1. Locate the appointment on the calendar that the patient wishes to cancel.
2. Click and hold or right-click on the patient's appointment.
3. Select the appropriate cancel information. A recall dialog appears for additional information.



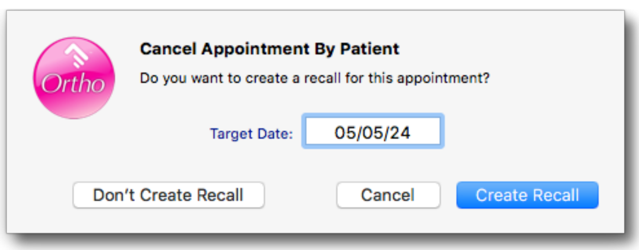


Figure 4-18: *Cancel Appointment by Patient*

4. Fill in the target date.
5. Click Create Recall. The appointment will be added to the recall list.
6. Open Patient Information. (Command + I) and search for patient.
7. Click Appts/Recalls tab. The cancelled appointment is displayed.

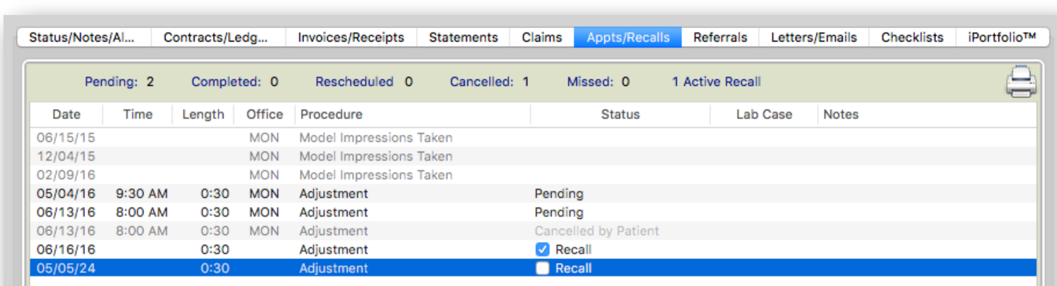


Figure 4-19: *Patient Information window*

This window is a quick way to see the appointment status of a patient. The Patient Information window will be discussed in more detail in Lesson Six.

Rescheduling Appointments

Rescheduling appointments in topsOrtho can be handled by dragging and dropping, or searching from the Appointment Book drawer.

Drag and Drop - Option #1

If a patient calls in the morning and asks you to reschedule their appointment for later in the day the best method to use is drag and drop.

1. Open the Appointment Book to the desired day.
2. Click and drag the appointment to an open location on the calendar. The appointment has been rescheduled.

Drag & Drop - Option #2

If a patient has an appointment for tomorrow and would like to reschedule to a date in the future, again drag and drop is an efficient way to handle this request.

1. Locate the patient's future appointment.
2. Click on the patient's appointment. This places the patient's information in the appointment drawer. A bolded appointment represents an appointment scheduled for today.
3. Go to the desired day in the calendar.
4. Drag the appointment from the Drawer to the new time The appointment has been rescheduled.

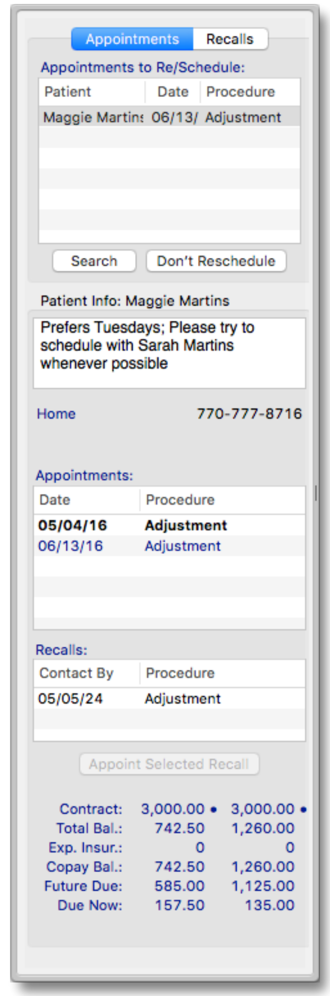


Figure 4-20: *Appointment Drawer*

Drag and Drop - Option #3

You can drag an appointment into the Appointments to Re/Schedule pane within the Appointment Drawer. Once you navigate to the desired day and time, simply drag the appointment onto the appointment book. Using this method displays the option of rescheduling by patient or practice for tracking purposes. The original time will be in gray, indicating a hold on the appointment in case the patient changes her mind and would like the original time.

1. Locate the patient's future appointment. The appointment drawer is open.
2. Drag the appointment into the Appointments to Re/Schedule pane. The pane turns yellow.

3. The Reschedule Appointment window appears.

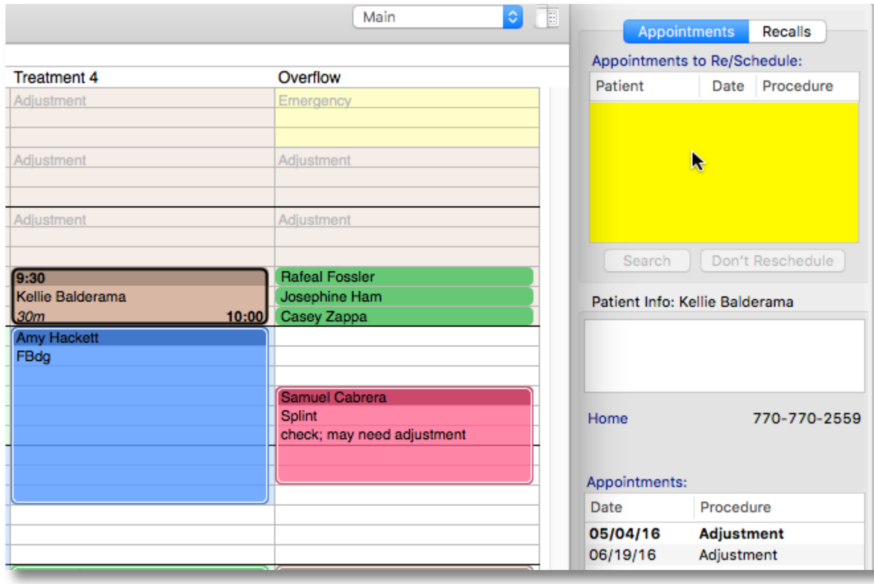


Figure 4-22: *Appointments to Re/Schedule*

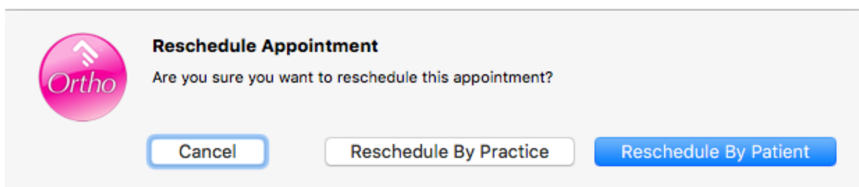


Figure 4-23: *Reschedule Appointment Window*

4. Select Reschedule by Practice or Patient. The appointment is placed in the pane with the original appointment displayed in gray.

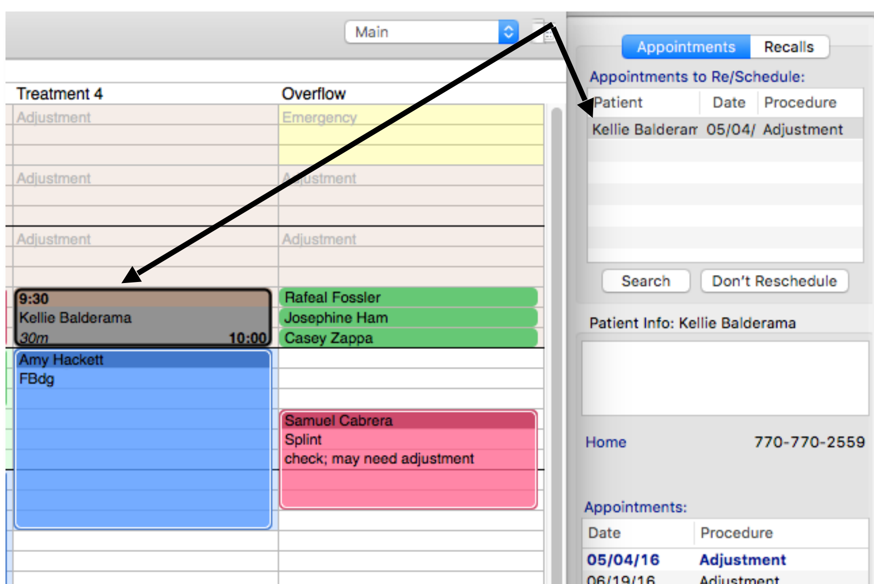


Figure 4-24: *Reschedule Appointment*

Using Search or Don't Reschedule

Once the appointment is in the Drawer, you are able to search for a new day and time or if the patient changes their minds, simply click Don't Reschedule to leave the appointment on the original day and time.

1. Click Search under the appointment in the drawer to display the Appointment Search window.
2. Select the criteria to search for an appointment slot (as described in Topic 4A, Creating Appointments).

OR

1. Click Don't Reschedule to leave the appointment in the original location.

Drag and Drop - Option #4

You can also drag an appointment directly from the Patient Information Window onto the calendar. This is useful when a patient calls and cannot remember when his next appointment is. Open the patient information window, arrange the calendar to be side by side and drag the appointment to the new day and time. topsOrtho will mark the appointment as Rescheduled by Practice.

1. Open Patient Information (Command + I).
2. Click Appt.Recall/Lab tab.
3. Place the Appointment Book side-by-side.
4. Navigate to the desired day.
5. Click on the appointment to be rescheduled.
6. Drag the appointment to the new day and time.

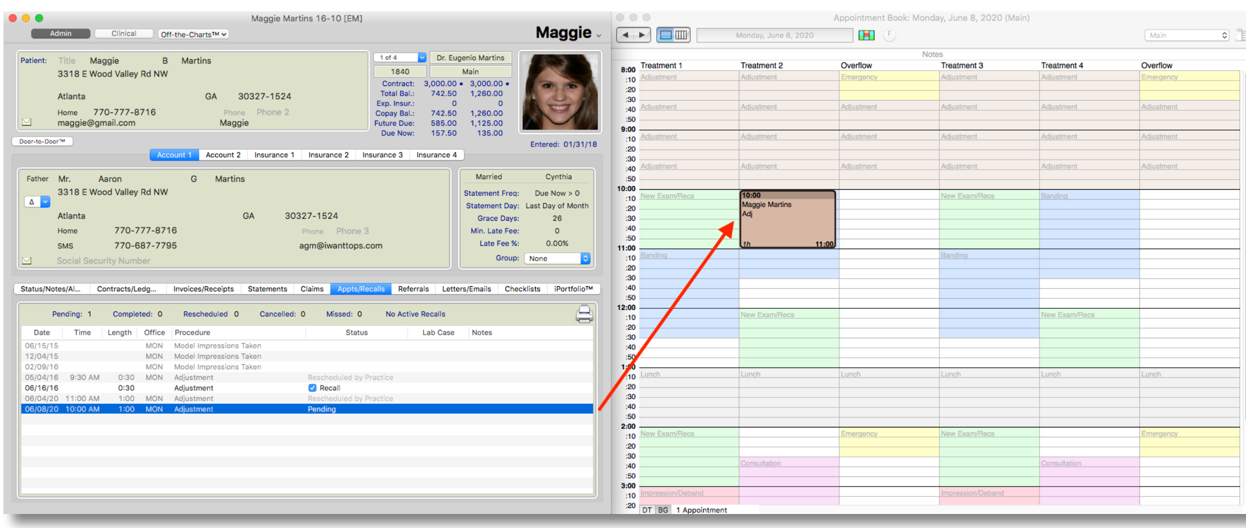


Figure 4-25: *Rescheduled appointment*

Rescheduling Appointments using the Contextual Menu

As with canceling an appointment, you are able to reschedule an appointment using the contextual menu. This option also tracks the appointment status in the Patient Information window.

1. Locate a patient's appointment.
2. Click and hold or right click on the appointment to display the contextual menu.
3. Select Reschedule Appointment by Patient or Practice. The Reschedule verification window appears.

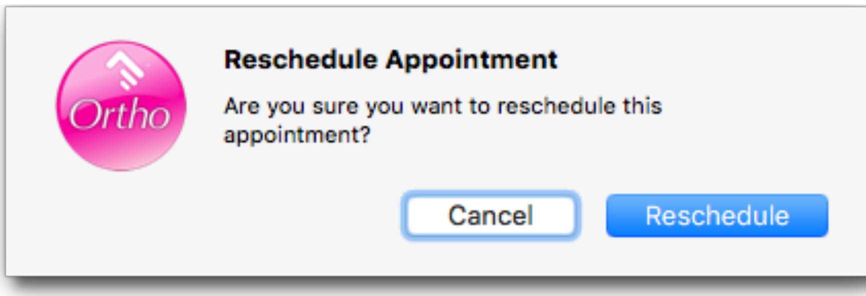


Figure 4-26: *Reschedule Appointment Verification*

4. Click Reschedule.
5. The appointment is grayed out and placed in the Appointment Book Drawer to search. Follow the above steps to search for an appointment.

Deleting Appointments

There will be times when you must delete a scheduled appointment from the Appointment Book. The contextual menu is an efficient way to do this. Please note that topsOrtho will not keep track of deleted appointments.

Deleting an Appointment

1. Locate the patient's appointment on the Appointment Book.
2. Click and hold or right click to display the contextual menu.
3. Click Delete Appointment.
4. Click Delete.

Tracking Appointments

It's easy to track appointments in topsOrtho, since it gives you the flexibility to create lists and reports with your specified criteria. For example, you can view missed appointments, create recalls, view appointments requiring lab requests, etc. You'll never have a patient fall through the cracks!

Recalls

If a patient misses an appointment, topsOrtho automatically creates a recall for him when rollover occurs. This allows you to create a list the next day of the patients to call and reschedule. You can also create a manual recall if a patient calls to cancel an appointment but doesn't have his schedule with him to provide a date and time. Creating a manual recall will remind you to call him back to reschedule. You'll also want to create a recall if you delete an appointment without rescheduling it.

Creating a Manual Recall

1. From the tops menu, click Action.
2. Click New Recall…
3. Search for patient.

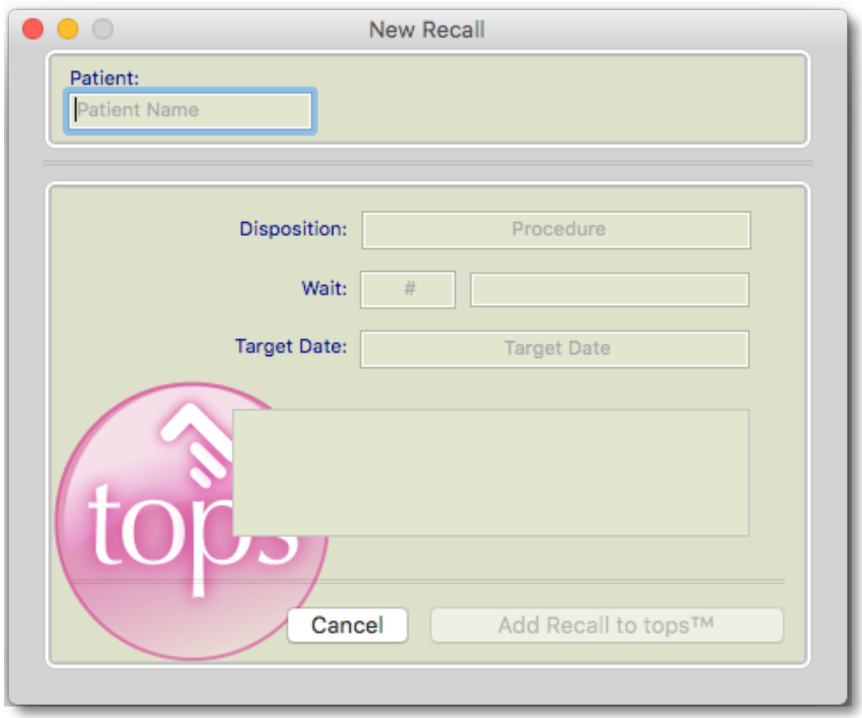


Figure 4-27: *New Recall*

4. Choose the patient from the list (if required) and click OK.
5. Press tab to move to the next field.
4. Select the Disposition from the list, press tab.
5. Enter the number you would like to wait until you call the patient back, press tab.
6. Select time period; e.g., days, weeks, months years, press tab.
7. The Target Date automatically fills in based on the time period selected. You can change this information.
8. Tab and enter any relevant notes.
9. Click Add Recall to topsOrtho. The recall has been created.

Viewing Recalls

topsOrtho allows you to view recalls two different ways, from the Appointment Book drawer or by creating a list.

Viewing Recalls from the Appointment Drawer

1. Open the Appointment Book (Command + B).
2. Open the Appointment Drawer on the top right (if required).
3. Click the Recalls tab at the top of the drawer. Click the column headers to sort.
4. Select Patient and their information will appear below.
   If you double-click on a recall in the drawer, Patient Information will automatically open, displaying the Appt/Recalls tab.

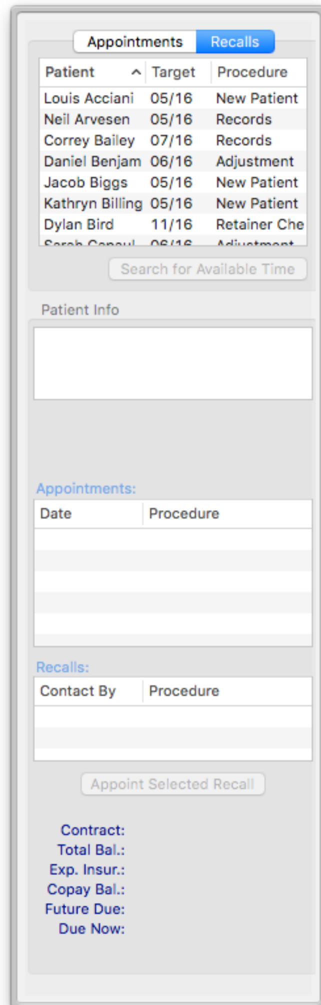
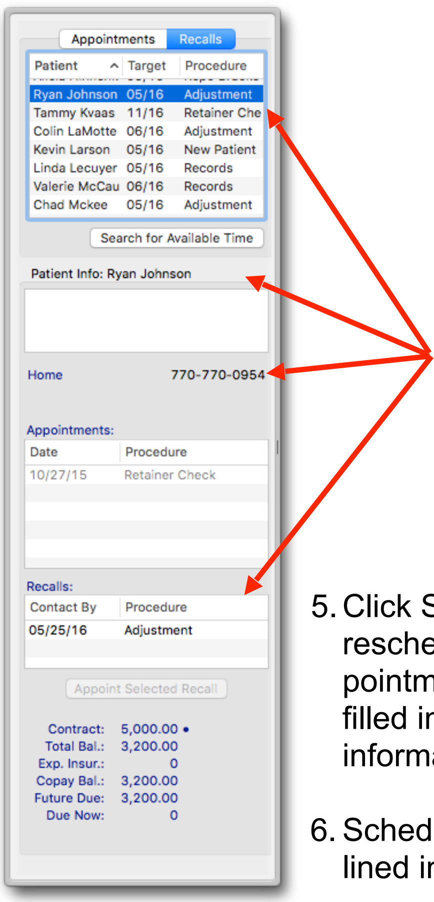


Figure 4-28:
Appointment Book Drawer Recalls



5. Click Search for Available Time to reschedule the patient. The Appointment Search window appears filled in with the appropriate recall information.

6. Schedule the Appointment as outlined in Topic 5A.

Figure 4-29: *Patient Recall Information*

Viewing Recalls from a List

Another way to view your recalls is from a list within topsOrtho. When using the list feature, you can customize the list according to your needs. For example, you can select a specific date range for recalls, sort the list by patient name or date of appointment, modify column headers, or choose many other options.

Viewing a List of Recalls

1. Click Matrix from the menu bar.
2. Click Recalls.

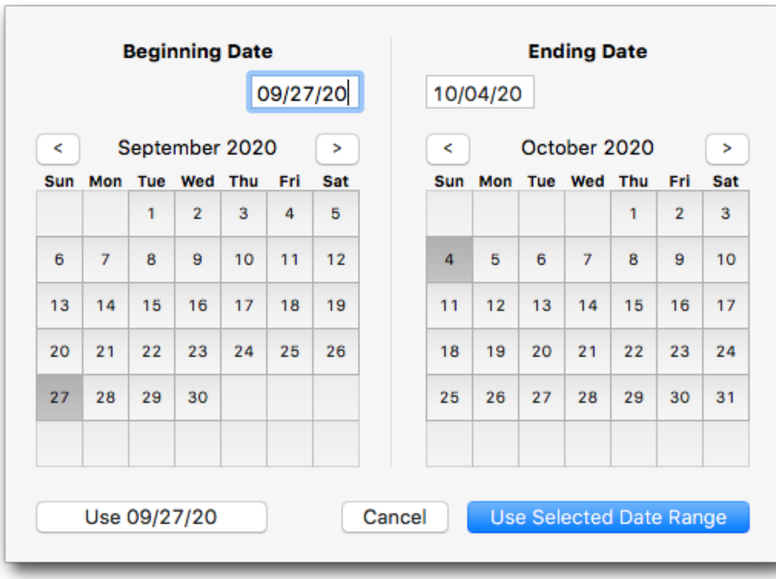


Figure 4-30: *Recall List Date Range*

3. From the Beginning Date and Ending Date Calendar, select the ***Date Range***. Click on the desired date.

   If you just want the starting date, you can click the Use MM/DD/YY button located at the left of the window.

4. Click Use Selected Date Range. The recall list will compile.

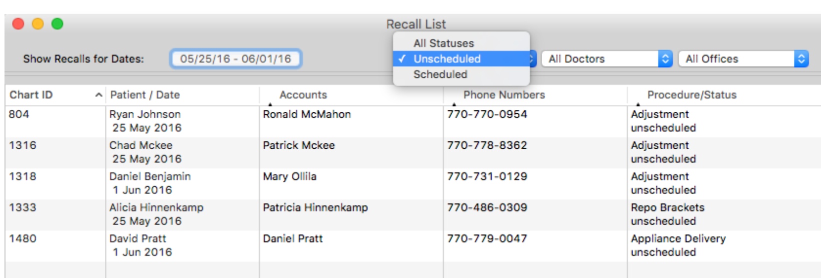


Figure 4-31: *Recalls for a Specific Date Range*

Customizing the Recall List

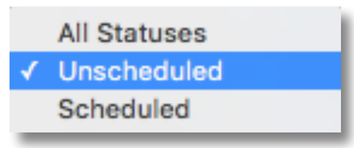
Once the Recall List has compiled for the date range desired, you can change the way you view the list.

Show Recalls for Dates:

If you have selected the incorrect date range, you can click on the date range button and the calendar will reappear for you to select the desired date range.

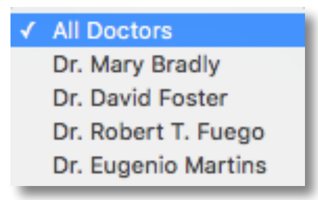
Unscheduled

You can selected All Statuses or Scheduled Recalls to view on your list. The default is Unscheduled



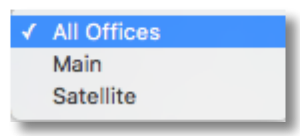
Doctors

If there is more than one doctor in your practice, you can select the doctor from the drop down list.



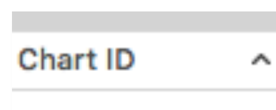
All Offices

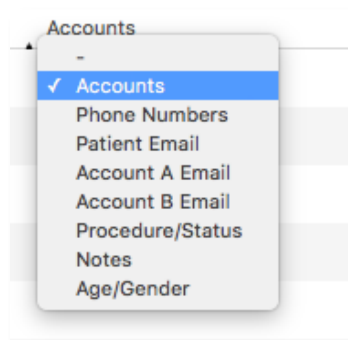
If you have more than one practice you can select the practice from the drop down list.



Sorting Columns

Any column can be sorted. The arrow to the right of the header name indicates how the list is currently being sorted, either ascending or descending.





Column Headers

You can select the column header from a drop down list if you see a small triable located to the left of a column header. Click on the triangle to see the available column header choices.

Printing Envelopes or Labels from the Recall List

You can print envelopes or labels from the Recall List. You can print a single address or multiple addresses.

Selecting several envelopes or labels in a continuous list

1. Click the first patient's name.
2. Hold the Shift key down and click on the last name you want printed. All of the names between the first and last will be selected.

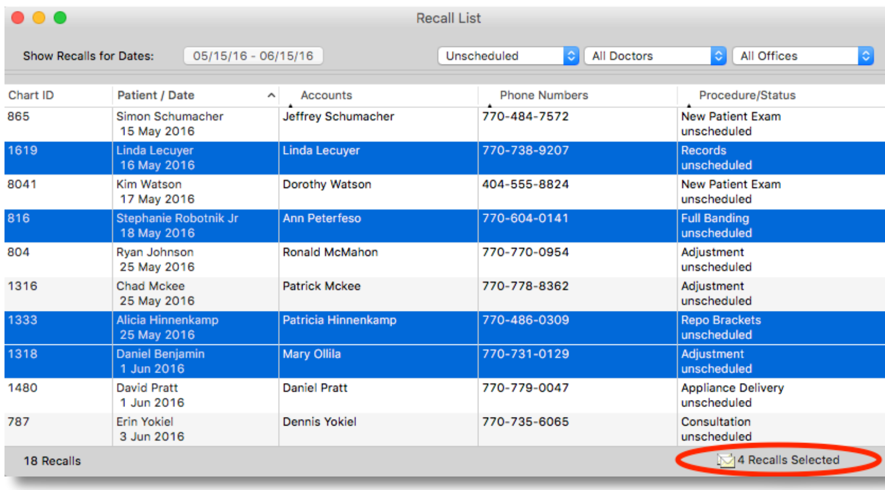


Figure 4-32: *Continuous patients selected*

Selecting non-contiguous envelopes or labels

1. Click the first's patient name.
2. Hold down the Command key and click on the remaining patient names to select.

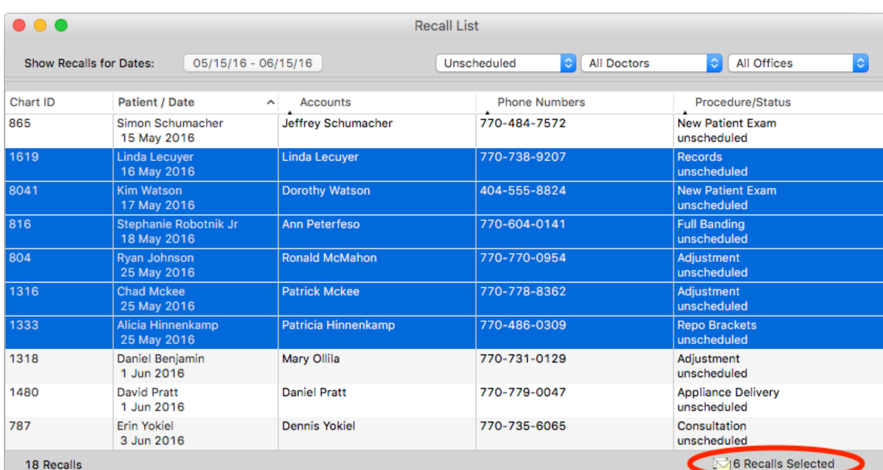


Figure 4-33: *Non-continuous patients selected*

Complete Printing

1. Click the Envelope that is circled in the above pictures, located in the lower right corner. It displays the number of recalls you've currently selected.

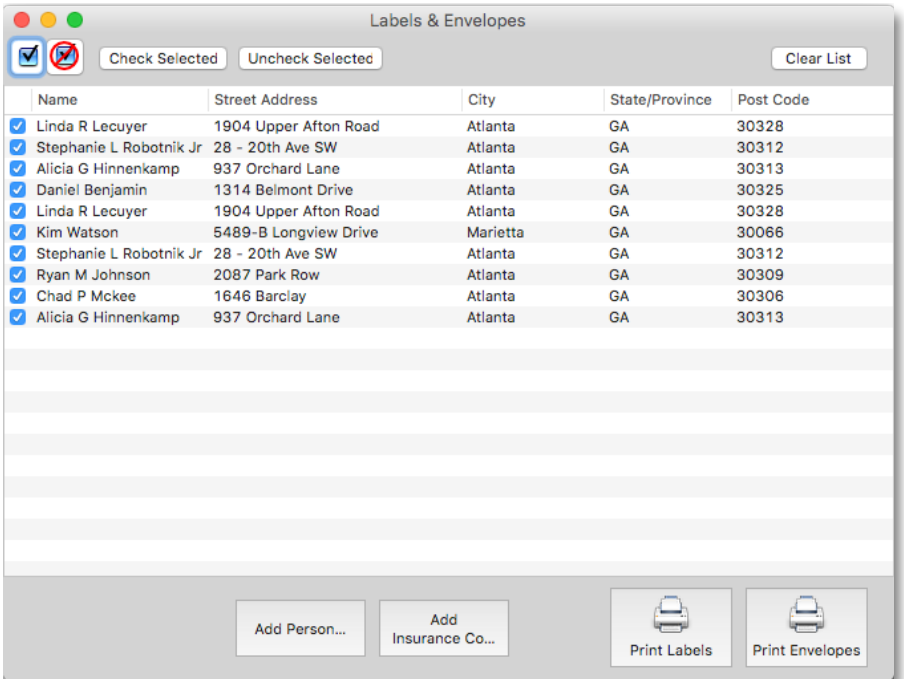


Figure 4-34: *Labels and Envelopes*

4. Select Print Labels or Print Envelopes.

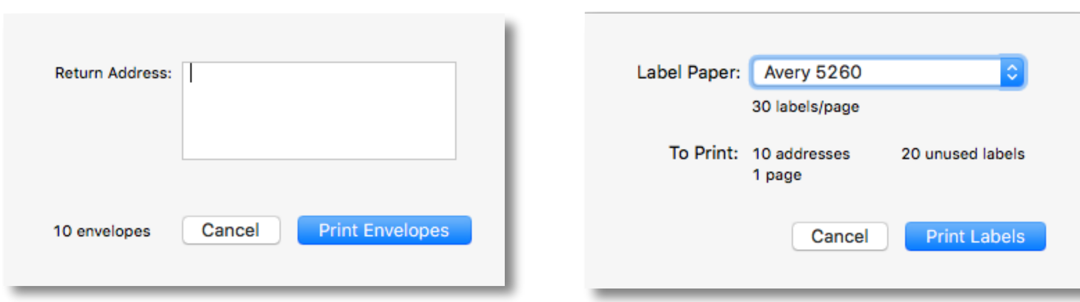


Figure 4-35: *Envelopes or Labels*

5. For envelopes, fill in the return address if necessary. For the labels, select the labels that you use. Click the Print button.

If you do not want to print right now, but perhaps at the end of the day, the list will stay populated with the names you've added. You can continue to add names to the list and print at your leisure. Once you log out of topsOrtho, the names will automatically clear from the list.

Deleting a Recall

There may be times when you want to delete a recall. Perhaps the patient has relocated and transferred to another office, or you may not have selected the recall when you were making an appointment. You can delete a recall directly from the recall list or from the Patient Information window.

Keyboard Shortcut
Command + Backspace

Deleting a Recall from the Recall List

1. From the Matrix menu, select Recall and choose the Patient.
2. From the tops menu, select Edit.
3. Select Delete Recall.

Deleting a Recall from the Patient Information Window

1. Open the Patient Information window for the patient.
2. Select the Appts/Recalls tab.
3. Select the Recall to delete.
4. From the menu, select Edit.
5. Choose Clear.

Patients Without Appointment or Recall

Reports can help track your appointments. There are several available reports, but right now we'll concentrate on a report that shows patients who do not have an appointment or a recall. You may want to run this report on a weekly basis, just to make sure that all of your active patients have appointments. The report compiles from the current date.

Creating the Patients Without Appointment or Recall Report

1. From the tops Menu, select Reports
2. Click Active Patients Without Appointments or Recall.

The report displays information needed to follow up with the listed patients. Once an appointment or recall is made, the patient name will no longer be shown.

Patient	Account		Account Phone		Account Phone	Patient Email	Account Email	Patient Office	Last Appt Date	Last Appt Procedure	Last Appt Duration	Tx Status
Sally Breck	Harvey Breck	Home	404-555-1478	Work	404-555-2369	hbreck@gmai...	hbreck@gmai...	MON				Initial Contact
Eve Johnson	Randall Johnson	Home	770-699-2437	His Work	770-770-0428			MON				Initial Contact
Anders Lundberg	Tom Lysiak	Home	770-604-0140	Her Work	770-347-4323			MON				Initial Contact
Lindsay Quinn	Steven Quinn	Home	770-770-6567	His Work	770-688-4063			MON	04/27/16	Records	1 hr	Active Treatment
David Rivera	Marie Rivera	Home	757-447-3987	Work				MON				Initial Contact
Kaitlin Ross	Kenneth Ross	Home	770-633-5605	Her Work	770-624-3790			MON	04/08/16	Records	1 hr	Active Treatment
Jane Severson	Larry Severson	Home	770-755-7243	His Work	770-282-6060			SAT	04/28/16	Appliance Impres...	30 mins	Awaiting Speciali...
Suzanne Smith	Daniel Smith	Home	770-489-0353	Work				MON	04/07/16	Appliance Delivery	20 mins	Active Multi-Spe...
Danny Theis	Ronald Theis	Home	770-730-7308	Work				SAT	04/29/16	Appliance Delivery	40 mins	Final Retention
Melissa Wilson	Jeff Wilson	Home	770-484-5217	Her Work	770-296-6569			SAT	05/03/16	Separators	10 mins	Final Retention

Figure 4-36: *Patients Without Appointment or Recall*

3. Double-click on a patient name to open his ***Patient Information*** window. You can look at her information to help determine why he does not have an appointment scheduled.
4. You can now schedule a future appointment based upon the patient's preferences using the method you prefer.

Summary

In this lesson, you should feel confident with:

- Creating appointments with Drag and Drop as well as Search
- Managing appointments with Recalls, Lists and Reports

Lesson 5 Patient Management

Lesson Five Overview

In this lesson, we'll discuss patient management with topsOrtho. We'll talk about how to create new patients in the system, view their information and send out patient letters.

Objectives:

To become familiar with patient management, you will:

5A Create a New Patient
Creating a new patient in topsOrtho is critical. This is where all information concerning this patient is stored. You need to enter as much information as possible for a complete patient information record.

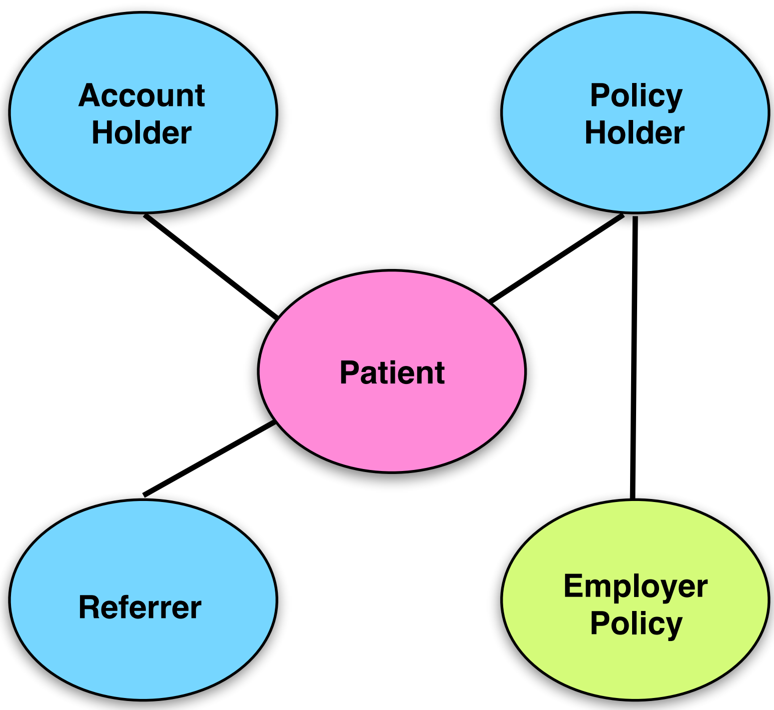
5B View a Patient's Information
We will discuss each tab in the Patient Information window and how it is used.

5A Creating a New Patient

Before creating a new patient in topsOrtho, you should first search for that patient. For security purposes, you cannot delete a patient from the system, so you need to first make sure that the patient does not already exist. The fastest way to do this is to use the regular search criteria for finding a patient: type the first three characters of his first name and the first three characters of his last name.

There are four types of people in topsOrtho:
Patients
Account Holders
Policy Holders
Referrers

The relationship looks like this:



Patient - The person being treated.
Account Holder -The person responsible for the account (there may be two).
Policy Holder -The person who holds the insurance policy, usually through an employer.
Referrer - The person who referred the patient to the orthodontist, usually the patient's dentist.

topsOrtho requires you to fill in the following fields to create a new patient.

Patient:
First and Last name
Gender
Orthodontist
Location where the patient is to be seen

Account holder
First and Last name
Phone number
Relationship to Patient

When entering names into topsOrtho, you do not have to hold down the Shift key. The first letter of names will automatically capitalize.

Keyboard Shortcut
Command + N

Entering New Patient Information to topsOrtho
1. From the tops menu, select Action.
2. Click New Patient...

Use the normal search criteria to see if the patient has been entered into topsOrtho.

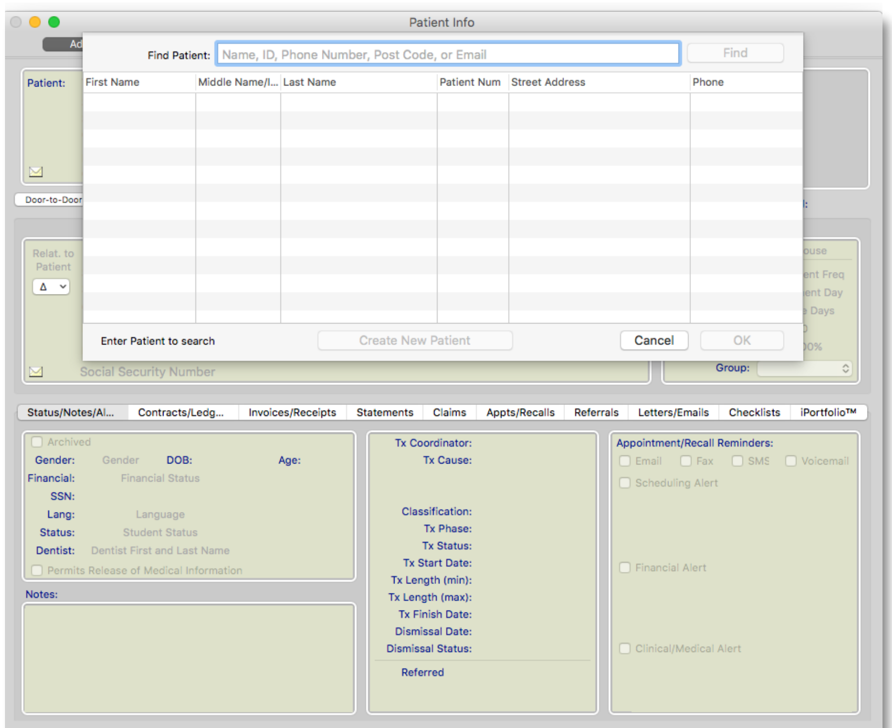


Figure 5-1: *Search window*

3. Search by typing the first three characters of both the patient's first and last name.

4. Click the Find button. In the lower left, topsOrtho indicates No matching Patients found.

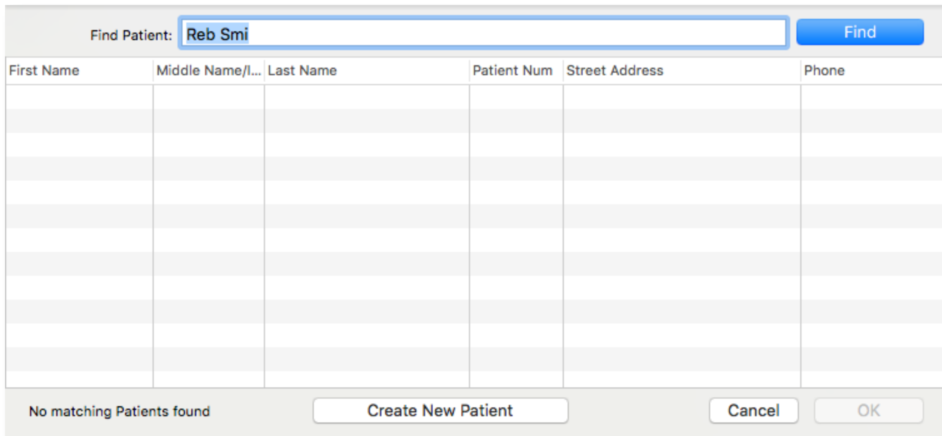


Figure 5-2: *No matching Patients found*

5. Click Create New Patient button. Use the tab key to advance from field to field. ***Do not press the Enter key.*** When you enter the patient's date of birth, it is not necessary to type dashes or slashes. They will be added automatically.
6. Enter the information the patient provides, press tab to advance to the next field.

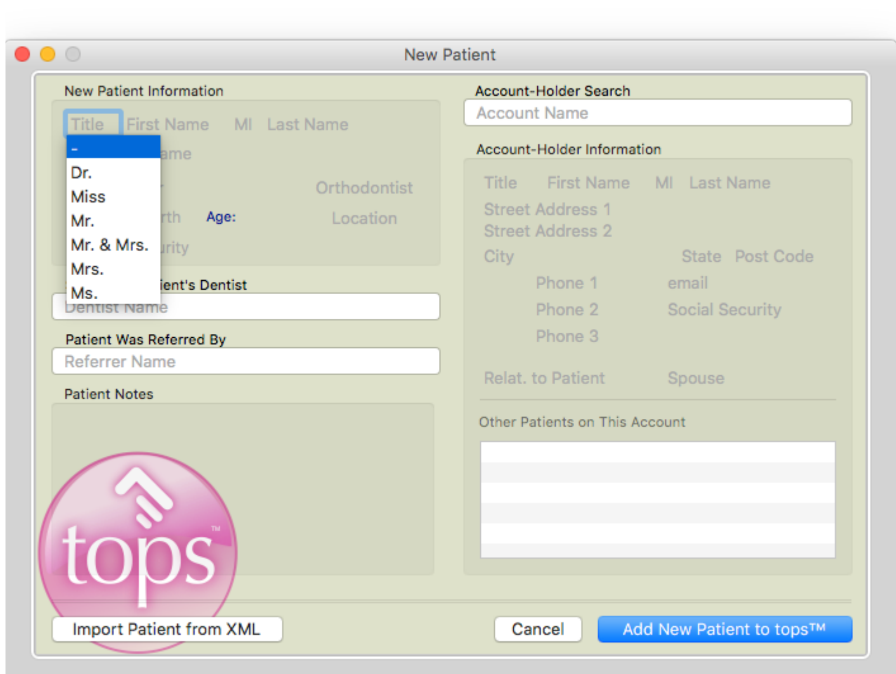


Figure 5-3: *New Patient window*

Entering Account Holder Information

Once you have selected the patient's office and pressed Tab, you are asked for account holder information. This can be entered by searching for an existing account holder, or by creating a new account holder.

1. Type the first three characters of the account holder's first and last names.

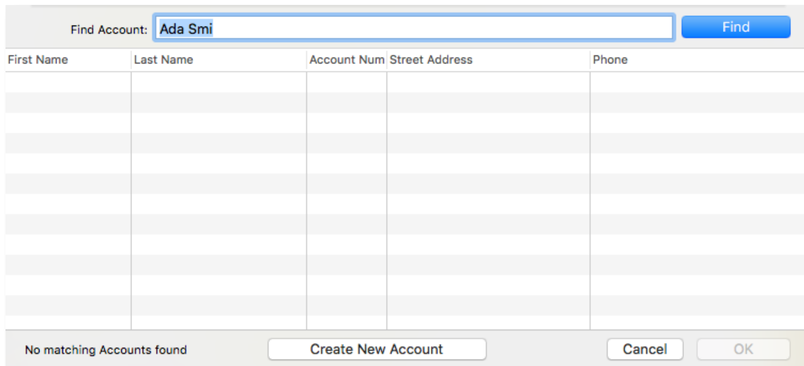


Figure 5-4: *Account Holder Search Window*

2. Click Create New Account. topsOrtho assumes the account holder has the same last name as the patient, and automatically fills in this field. If the last name is different, just type over it. When you're ready to add the city, topsOrtho skips directly to the Postal Code field. Enter the postal code and topsOrtho will automatically fill in the city and state.
3. Enter in the new patient information press tab to go from field to field. You do not have to type dashes in the phone number fields. They will be added automatically.

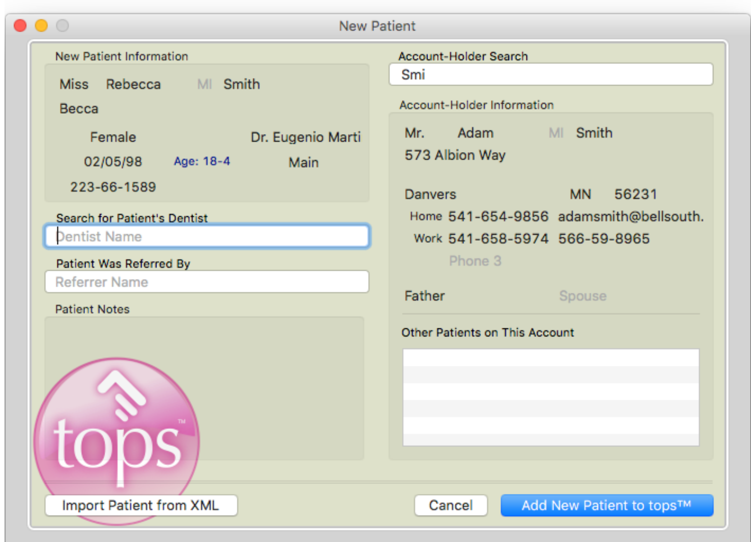


Figure 5-5: *Search for Patient's Dentist*

4. Once you complete the Relationship to Patient field and press Tab, you are taken to the Search for Patient's Dentist field to enter the dentist's name.
5. Enter in the patient's dentist name, press Tab. If that dentist is in your database, just select the name from the list. If not, you will need to add them.

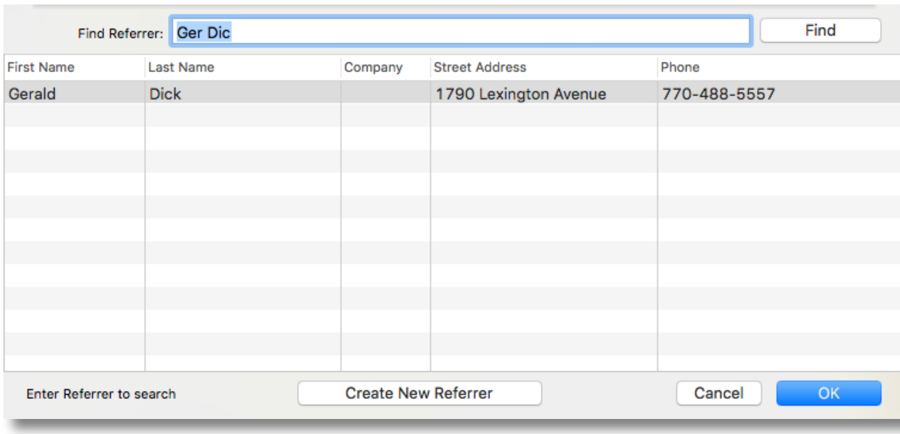


Figure 5-6: *New Patient Referrer List*

6. Select the dentist from the list.
7. Click OK and then press Tab.
   If the patient was referred by an individual or a dentist, you should search for this person.
8. Type in the search criteria for the patient's referrer, press the ENTER key.
   If the patient's referrer is in your database, just select the name from the list. If the patient's referrer is not in your database. you will need to add them in.

   Adding new referrers will be covered in Lesson Seven.

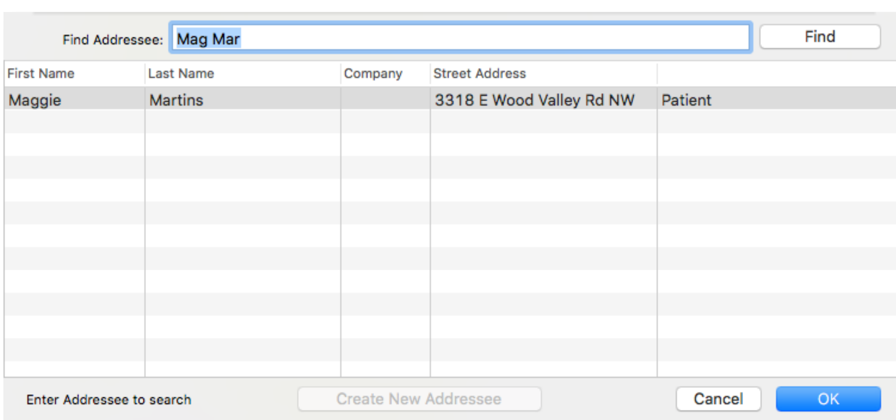


Figure 5-7: *Referrer search window*

9. Select the Referrer from the list.
10. Click OK. You have finished entering in the New Patient's information.

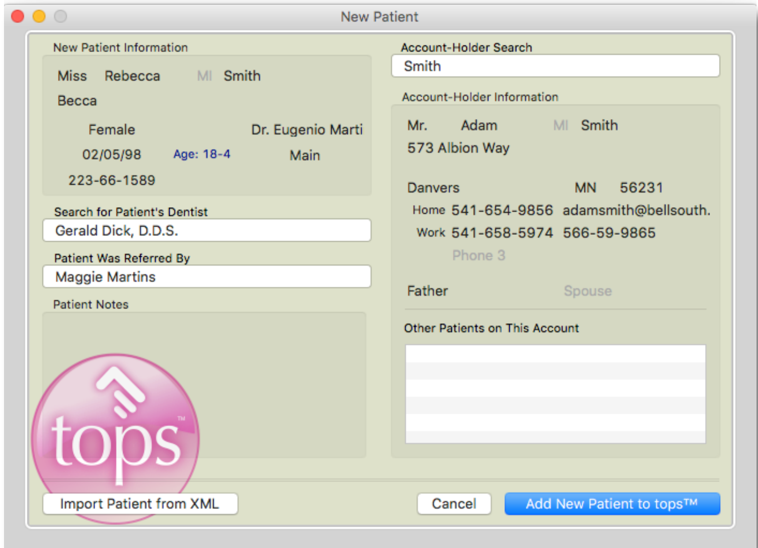


Figure 5-8: *New Patient Information filled in.*

If the account holder has other patients in treatment, they will be listed in the Other Patients on This Account area.

11. Add any notes about this patient to the Patient Notes section at bottom left.
12. Select Add New Patient to tops.

If you try to add a new patient to topsOrtho without the minimum required information, you will receive an error notification dialog box along with each field highlighted in red. These fields must be filled in to complete the patient information.

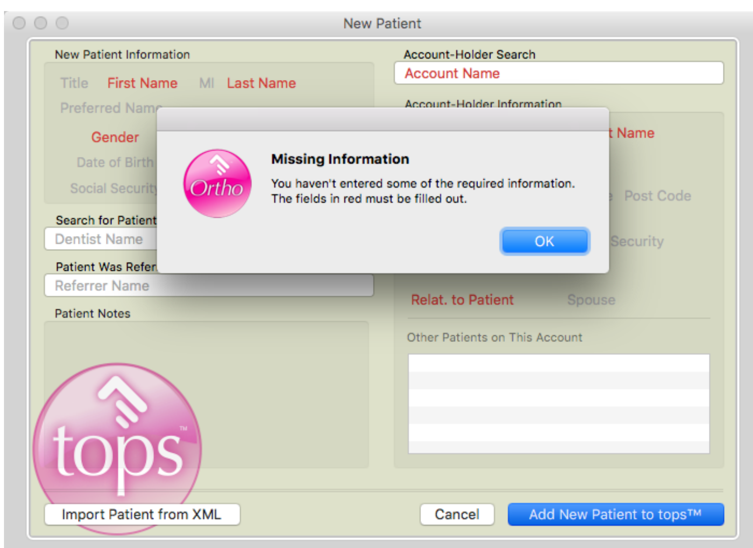


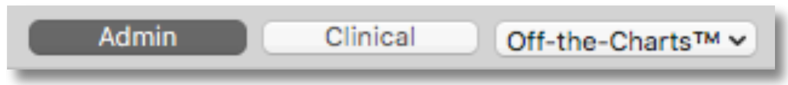
Figure 5-9: *Missing Information in the Patient Information window*

5B Viewing Patient Information

Once you've entered a new patient into topsOrtho, the Patient Information window displays. The default (Admin) view shows all the administrative information concerning this patient. There is also a Clinical view for diagnosis and treatment information as well as treatment notes. There is also an Off-the-Charts™ button that gives you access to other features, which we will discuss later.

Admin or Clinical

Select the patient information you want to access by clicking on either the Admin or Clinical button.



Off-the-Charts™ will be discussed in Lesson 19.

Patient Information Admin

There are keyboard shortcuts associated with the Patient Admin sections, see below:

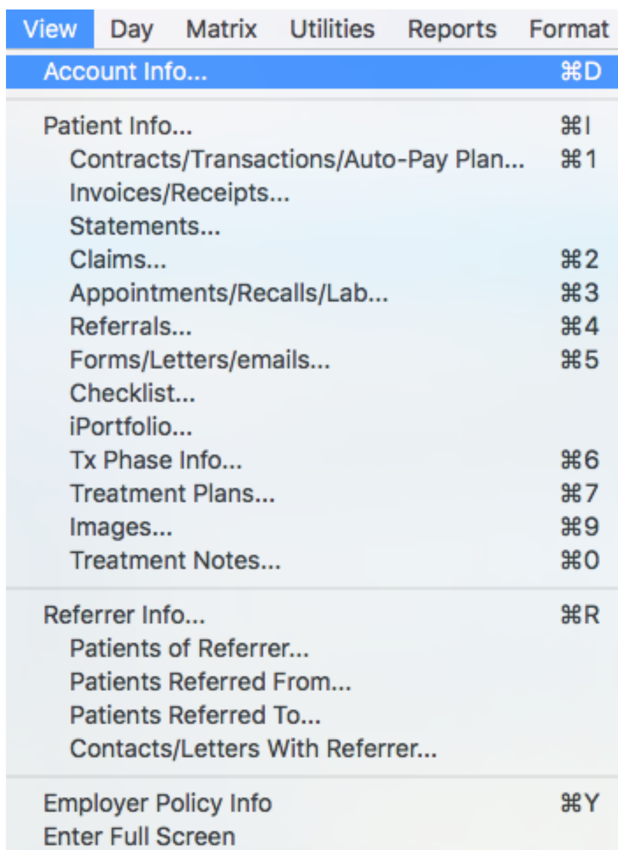


Figure 5-10: *View menu and keyboard shortcuts*

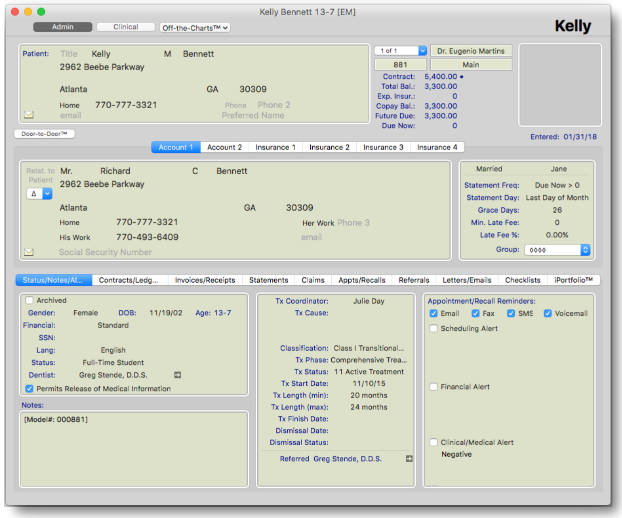


Figure 5-11: *Patient Information - Admin*

Section One - Admin

This section contains basic information about the patient.

Keyboard Shortcut
Command + I

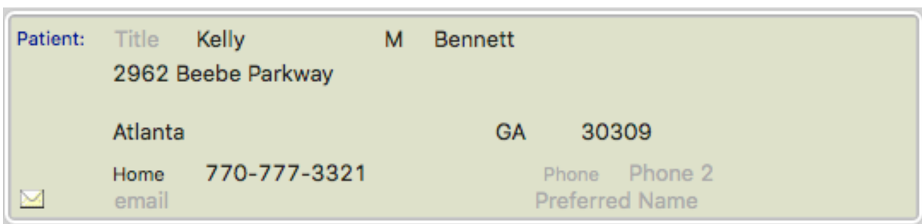
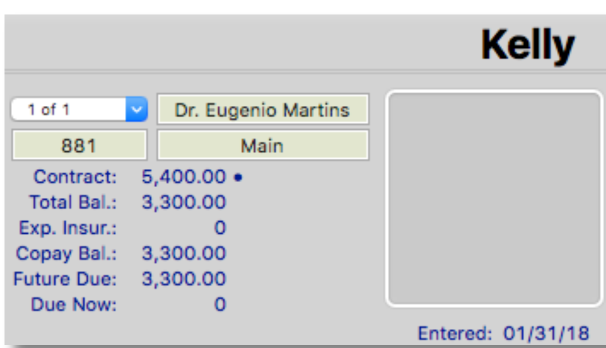


Figure 5-12: *Patient Information*

Patient Information

This displays personal information about the patient. Each of these fields can be edited by clicking in the field and typing in the correct information. Use the splitters drag to re-size the fields. To save your field size preferences, from the menu, select ***Window > Save Window Size*** per workstation. If you click the envelope icon located to the left of the patient's email address, topsOrtho will add this address to the Labels & Envelopes list for you to print at your convenience.



Patient Information

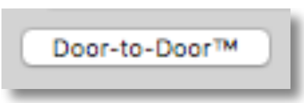
If the account holder has more than one patient in treatment topsOrtho displays 1 of 2 or 1 of 3 and opens patient information for the name you select.

This area shows the orthodontist assigned to the patient as well as the office the patient is assigned to. If you do not enter your own patient identifier, topsOrtho will assign a unique ID number.

If the patient has a contract, it will display the contract amount.

The white box will display the patient's current smiling photo when imported into tops-Ortho.

The date displayed shows the date in which the patient information was added to tops-Ortho.



Door-To-Door

Clicking this button opens Google maps and displays a map and directions from the patient's home address to your practice. You can email this to the patient or print it out and mail it with the new patient packet.

<u>Section Two - Admin</u>

Section Two contains information about the account holder.

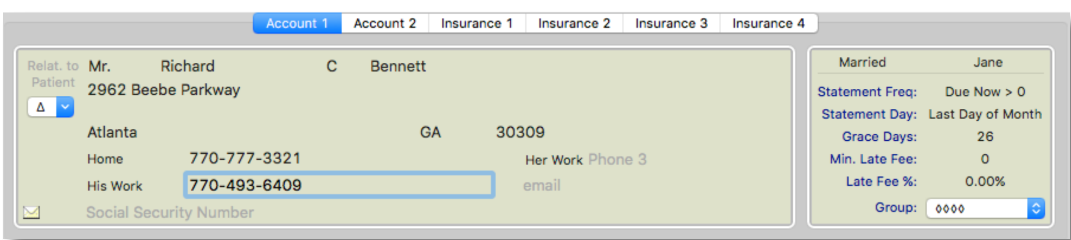
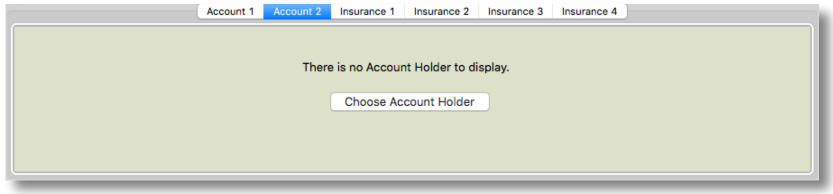


Figure 5-13: *Account Holder Information*

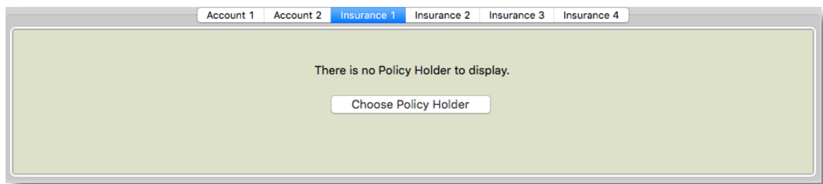
Accounts and Insurance

You can have up to two account holders and four policy holders in topsOrtho. The first Account Holder was filled in when you created the patient. If there is more than one account holder, click Account 2 and fill in the information.



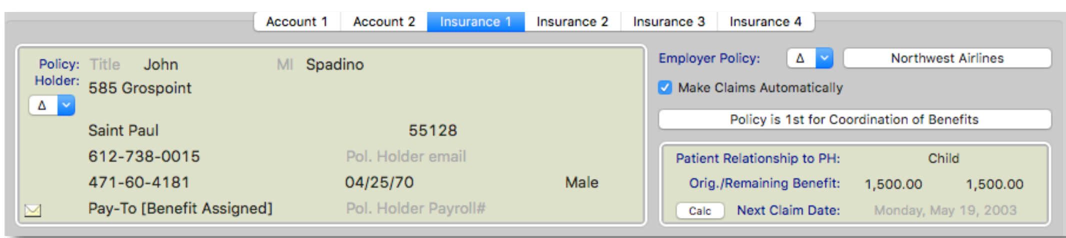
Account Holder 2

Click Choose Account Holder and create the second account holder by searching as you did for Account Holder 1



Insurance 1 - Insurance 2 - Insurance 3 - Insurance 4

Click Choose Policy Holder and create the first policy holder. How to add this information will be discussed in Lesson Eleven.

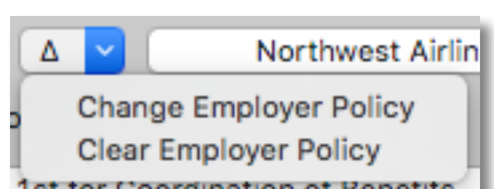


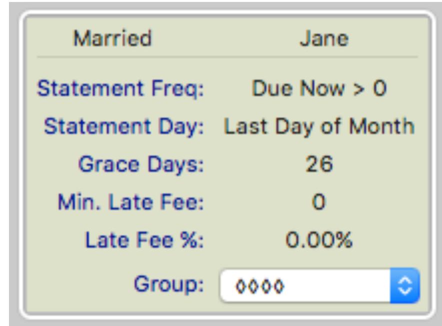
Account Holder Information

This displays personal information for the account holder. Each of these fields can be edited by clicking the field and typing the correct information. If you click the envelope icon located to the left of the email address, topsOrtho will add this address to the Labels & Envelopes window for you to print at your leisure.

Change or Clear Employer Policy

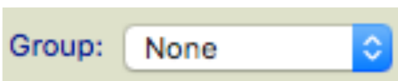
If the employer policy needs to be changed, you can click Change Employer Policy and search for the correct one. Clear Employer Policy is used to clear the employer policy.

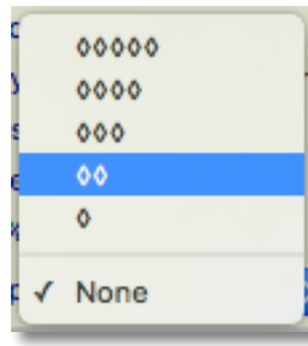




Account Holder Information
This displays the marital status and a spouse, if entered. The statement information is obtained in the Practice Setup which was discussed in Lesson Two. All of these fields can be edited.

Group
Click the drop down arrow to display a number from 1-5. You can use this area for a credit rating on your patient or account holder.





<u>Section Three - Admin</u>
Status/Notes/Alerts

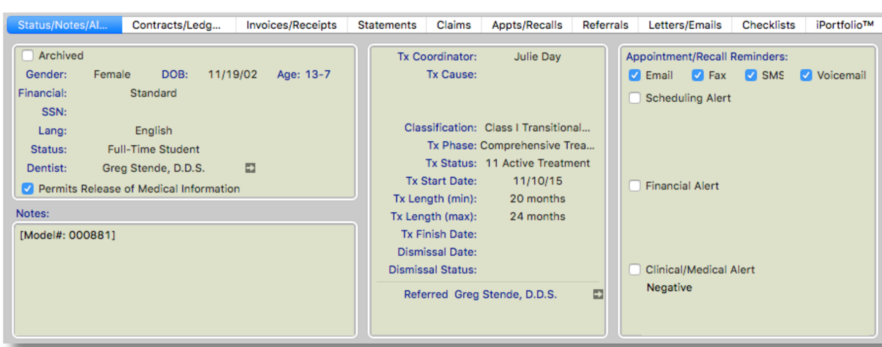
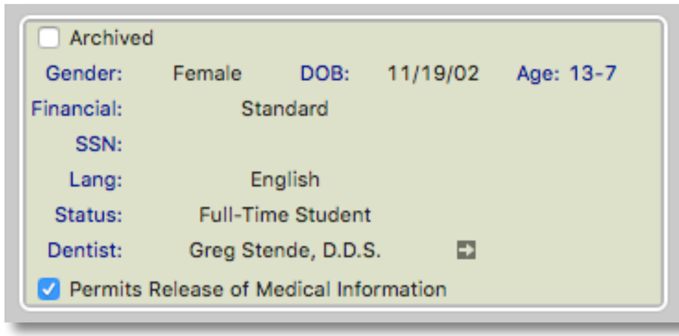


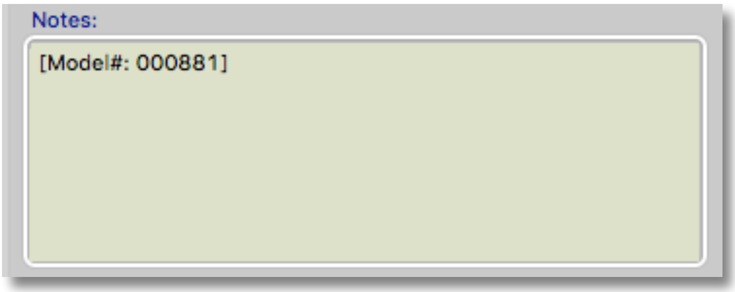
Figure 5-14: *Status/Notes/Alerts*

Status/Notes/Alerts is a quick overview of the patient's dentist and personal details. This section also contains treatment overview information and alerts for relaying important information about scheduling, financial transactions, or clinical/medical matters. You can also add general notes as required.



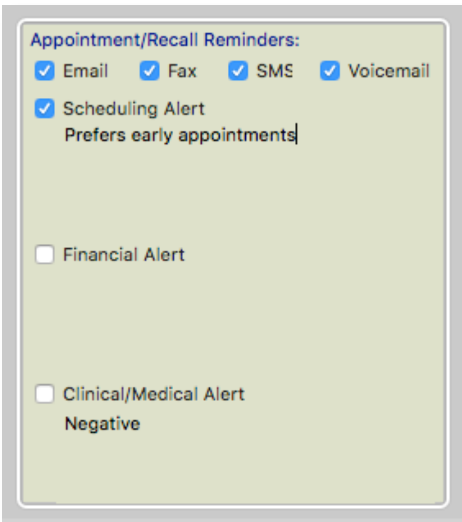
Status
This section allows you to change a patient’s status. Once a patient is finished with treatment, you can mark him as Archived/Inactive. You can modify each of these fields with the exception of Age, as topsOrtho calculates the patient’s age automatically when you enter the date of birth. If you select a language other than English, the topsOrtho Check-In welcome screen will display that language when the patient checks in. Permits Release of Medical Information indicates your patient or responsible party has signed your office’s HIPAA form. Financial status labels are customizable in Practice Setup.

Treatment Information
The Tx Cause, Accident Date, and Accident State are to be used for insurance purposes if treatment is due to an accident. The remaining Information in this section is generated from the Tx Phase Information and Diagnosis and Treatment Plan, located in Clinical View. Each field can be modified, which in turn will modify the clinical view. This is a quick look at the clinical status of your patient without going into the clinical view.



Notes

This section can contain any note that you want added to the patient file. These notes can be displayed as a selection in the Patient List. These notes can be modified.



Alerts

Appointment/Recall Reminders:

The appointment reminder preferences can be set up in Practice Setup and customized on a patient by patient basis.

Alerts can be changed at any time. You can choose to not display an alert at any time by removing the check mark. Alerts are shown at appropriate times in topsOrtho.

Contracts/Ledger/Auto-Pay

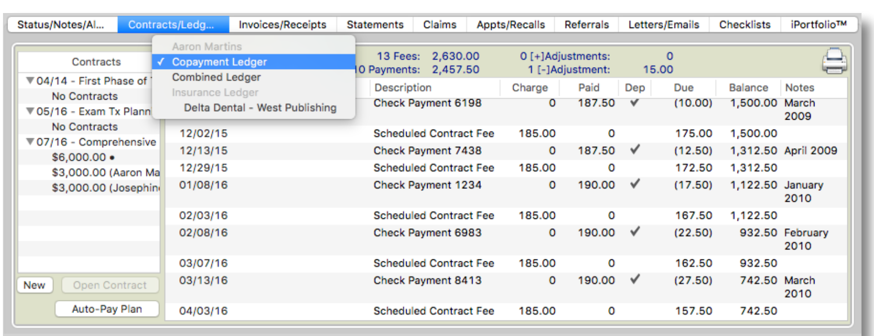


Figure 5-15: *Contracts/Ledger/Auto-Pay*

This displays a list of ledger entries with various views (Copayment ledger, Combined ledger, Individual ledger, etc.), as well as a list of contracts with controls for viewing or editing existing contracts. You can also view a patient's Auto-Pay plan and print ledgers and receipts.

Contracts

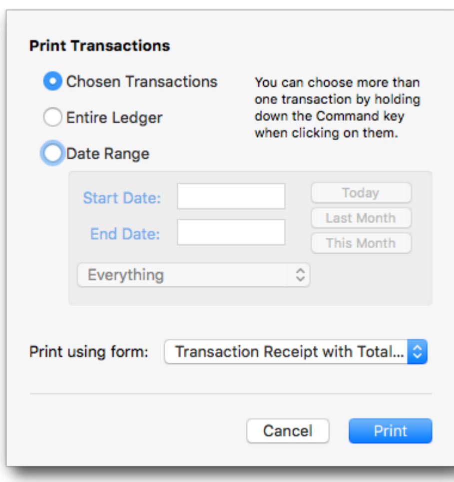
This section is a quick snapshot of contract information. It displays the active contract (one dot) and an active contract with insurance (two dots), as well as the account holder's name responsible for the contract. If a patient prefers an Auto-Pay plan, it is set up here. Creating new contracts and setting up auto-pay plans will be discussed in a later lesson.

Ledger View and Contract Summary

You can select the ledger you'd like to view from the drop-down list. This area gives you a snapshot of the number of fees and payments, as well as the totals for each. If the patient has had any negative adjustments (discounts or payments) or positive adjustments (charges), those will reflect in the snapshot as well.

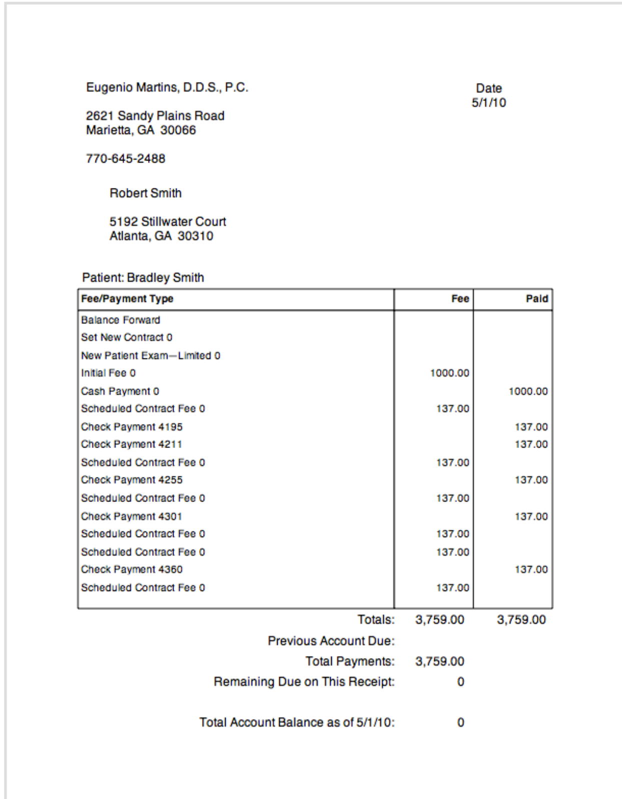
The printer icon allows you to print the ledger or individual transactions for the patient. You can print in a ledger view or an individual receipt. This is how you would print an individual receipt for an Auto-Pay plan.

Select transactions to reprint using several forms, receipts or ledger format. If you choose to print a receipt, you'll be asked to enter your password, since receipts are password protected.



The entire ledger can be printed as a ledger card, or you can choose to print only a date range.

This dialog window allows you the flexibility to print ledger information for your patients in the way they request.



Eugenio Martins, D.D.S., P.C.

2621 Sandy Plains Road
Marietta, GA 30066

770-645-2488

Date
5/1/10

Robert Smith

5192 Stillwater Court
Atlanta, GA 30310

Patient: Bradley Smith

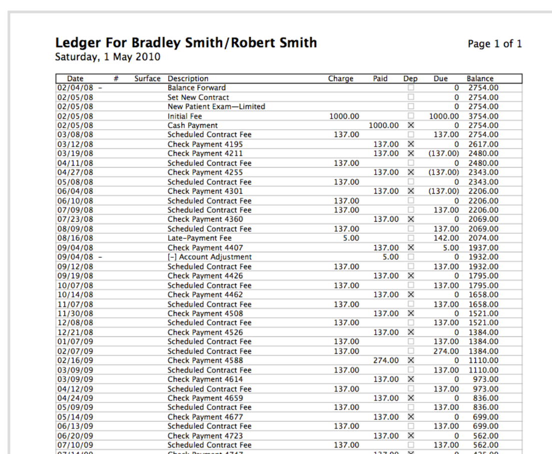
Fee/Payment Type	Fee	Paid
Balance Forward		
Set New Contract 0		
New Patient Exam—Limited 0		
Initial Fee 0	1000.00	
Cash Payment 0		1000.00
Scheduled Contract Fee 0	137.00	
Check Payment 4195		137.00
Check Payment 4211		137.00
Scheduled Contract Fee 0	137.00	
Check Payment 4255		137.00
Scheduled Contract Fee 0	137.00	
Check Payment 4301		137.00
Scheduled Contract Fee 0	137.00	
Scheduled Contract Fee 0	137.00	
Check Payment 4360		137.00
Scheduled Contract Fee 0	137.00	
Totals:	3,759.00	3,759.00

Previous Account Due:
Total Payments: 3,759.00
Remaining Due on This Receipt: 0

Total Account Balance as of 5/1/10: 0

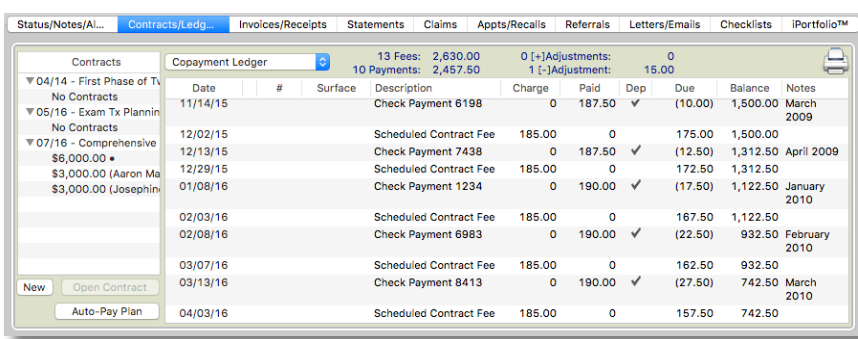
Ledger

The ledger displays all the transactions and changes that are made to contracts. It also indicates (by check mark) if a payment has been verified and deposited. The balance and notes from the new transaction window are also displayed.



Ledger For Bradley Smith/Robert Smith Page 1 of 1
Saturday, 1 May 2010

Date	#	Surface	Description	Charge	Paid	Dep	Due	Balance
02/04/08	–		Balance Forward				0	2754.00
02/05/08			Set New Contract				0	2754.00
02/05/08			New Patient Exam—Limited				0	2754.00
02/05/08			Initial Fee	1000.00			1000.00	3754.00
02/05/08			Cash Payment		1000.00	X	0	2754.00
03/08/08			Scheduled Contract Fee	137.00			137.00	2754.00
03/12/08			Check Payment 4195		137.00	X	0	2617.00
03/19/08			Check Payment 4211		137.00	X	(137.00)	2480.00
04/11/08			Scheduled Contract Fee	137.00			0	2480.00
04/27/08			Check Payment 4255		137.00	X	(137.00)	2343.00
05/08/08			Scheduled Contract Fee	137.00			0	2343.00
06/04/08			Check Payment 4301		137.00	X	(137.00)	2206.00
06/10/08			Scheduled Contract Fee	137.00			0	2206.00
07/09/08			Scheduled Contract Fee	137.00			137.00	2206.00
07/23/08			Check Payment 4360		137.00	X	0	2069.00
08/09/08			Scheduled Contract Fee	137.00			137.00	2069.00
08/16/08			Late-Payment Fee	5.00			142.00	2074.00
09/04/08			Check Payment 4407		137.00	X	5.00	1937.00
09/04/08	–		[-] Account Adjustment		5.00		0	1932.00
09/12/08			Scheduled Contract Fee	137.00			137.00	1932.00
09/19/08			Check Payment 4426		137.00	X	0	1795.00
10/07/08			Scheduled Contract Fee	137.00			137.00	1795.00
10/14/08			Check Payment 4462		137.00	X	0	1658.00
11/07/08			Scheduled Contract Fee	137.00			137.00	1658.00
11/30/08			Check Payment 4508		137.00	X	0	1521.00
12/08/08			Scheduled Contract Fee	137.00			137.00	1521.00
12/21/08			Check Payment 4526		137.00	X	0	1384.00
01/07/09			Scheduled Contract Fee	137.00			137.00	1384.00
02/07/09			Scheduled Contract Fee	137.00			274.00	1384.00
02/16/09			Check Payment 4588		274.00	X	0	1110.00
03/09/09			Scheduled Contract Fee	137.00			137.00	1110.00
03/09/09			Check Payment 4614		137.00	X	0	973.00
04/12/09			Scheduled Contract Fee	137.00			137.00	973.00
04/24/09			Check Payment 4659		137.00	X	0	836.00
05/09/09			Scheduled Contract Fee	137.00			137.00	836.00
05/14/09			Check Payment 4677		137.00	X	0	699.00
06/13/09			Scheduled Contract Fee	137.00			137.00	699.00
06/20/09			Check Payment 4723		137.00	X	0	562.00
07/10/09			Scheduled Contract Fee	137.00			137.00	562.00
07/14/09			Check Payment 4747		137.00	X	0	425.00



Date	#	Surface	Description	Charge	Paid	Dep	Due	Balance	Notes
11/14/15			Check Payment 6198	0	187.50	✓	(10.00)	1,500.00	March 2009
12/02/15			Scheduled Contract Fee	185.00	0		175.00	1,500.00	
12/13/15			Check Payment 7438	0	187.50	✓	(12.50)	1,312.50	April 2009
12/29/15			Scheduled Contract Fee	185.00	0		172.50	1,312.50	
01/08/16			Check Payment 1234	0	190.00	✓	(17.50)	1,122.50	January 2010
02/03/16			Scheduled Contract Fee	185.00	0		167.50	1,122.50	
02/08/16			Check Payment 6983	0	190.00	✓	(22.50)	932.50	February 2010
03/07/16			Scheduled Contract Fee	185.00	0		162.50	932.50	
03/13/16			Check Payment 8413	0	190.00	✓	(27.50)	742.50	March 2010
04/03/16			Scheduled Contract Fee	185.00	0		157.50	742.50	

Invoices/Receipts

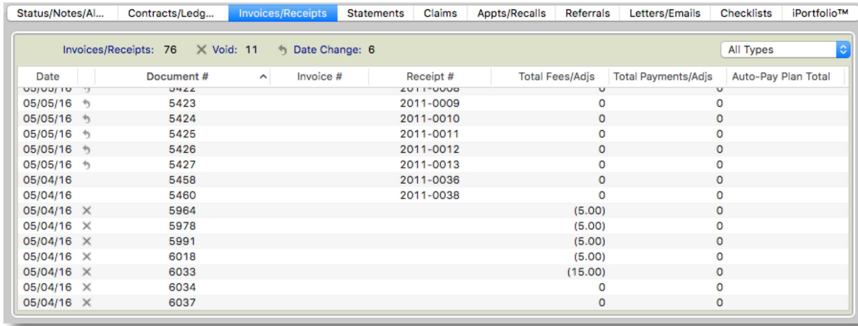
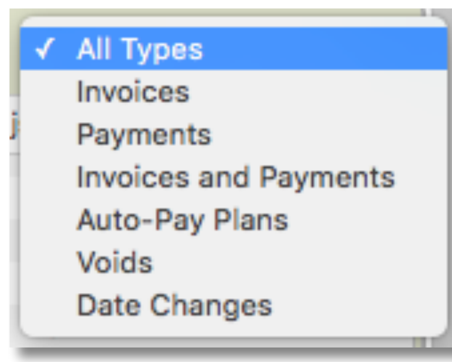
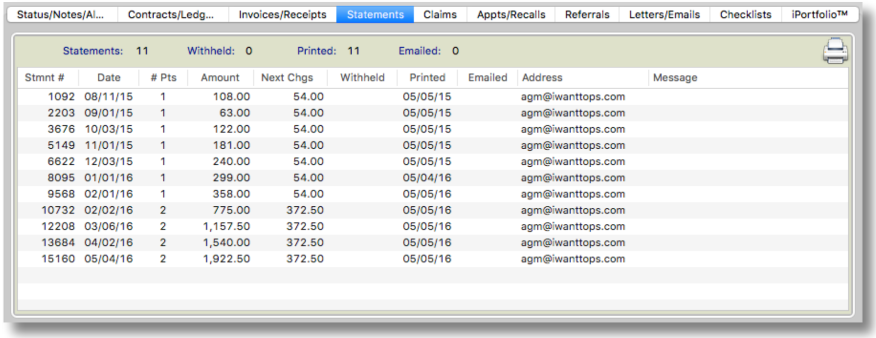


Figure 5-16: Invoices/*Receipts*

Each time a receipt is generated for a patient, it is stored in this section of Patient Information. You can view different types of receipts and double-click on one to open and print. A receipt cannot be modified.



Statements

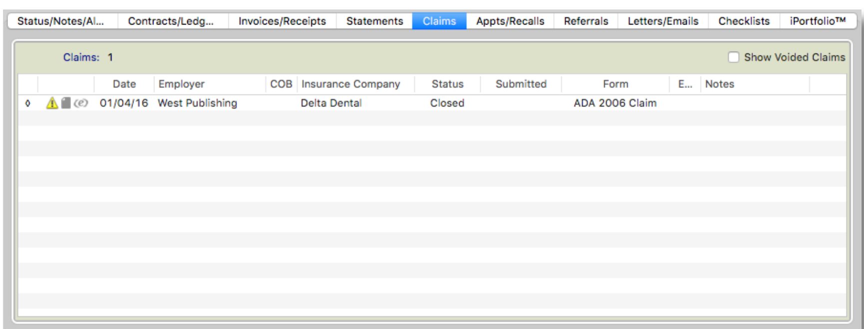


Stmnt #	Date	# Pts	Amount	Next Chgs	Withheld	Printed	Emailed	Address	Message
1092	08/11/15	1	108.00	54.00		05/05/15		agm@iwanttops.com	
2203	09/01/15	1	63.00	54.00		05/05/15		agm@iwanttops.com	
3676	10/03/15	1	122.00	54.00		05/05/15		agm@iwanttops.com	
5149	11/01/15	1	181.00	54.00		05/05/15		agm@iwanttops.com	
6622	12/03/15	1	240.00	54.00		05/05/15		agm@iwanttops.com	
8095	01/01/16	1	299.00	54.00		05/04/16		agm@iwanttops.com	
9568	02/01/16	1	358.00	54.00		05/05/16		agm@iwanttops.com	
10732	02/02/16	2	775.00	372.50		05/05/16		agm@iwanttops.com	
12208	03/06/16	2	1,157.50	372.50		05/05/16		agm@iwanttops.com	
13684	04/02/16	2	1,540.00	372.50		05/05/16		agm@iwanttops.com	
15160	05/04/16	2	1,922.50	372.50		05/05/16		agm@iwanttops.com	

Figure 5-17: *Statements*

Each time a statement is generated it is stored in this section of Patient Information. You can view different statements, click column headers to sort, and double-click a statement to open and print. A statement cannot be modified.

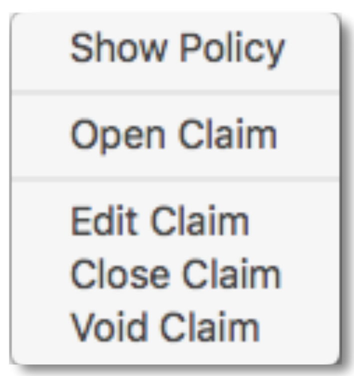
Claims



	Date	Employer	COB	Insurance Company	Status	Submitted	Form	E...	Notes
	01/04/16	West Publishing		Delta Dental	Closed		ADA 2006 Claim		

Figure 5-18: *Claims*

Each time a claim is generated for the patient, it is stored in this window. It can be either a manual or automatically generated claim. If you click on a claim, you can perform these functions within the window:



To view voided claims click the check box located on the right hand side of this window.To void a claim you must provide your password as this function is password protected.

Appts/Recalls

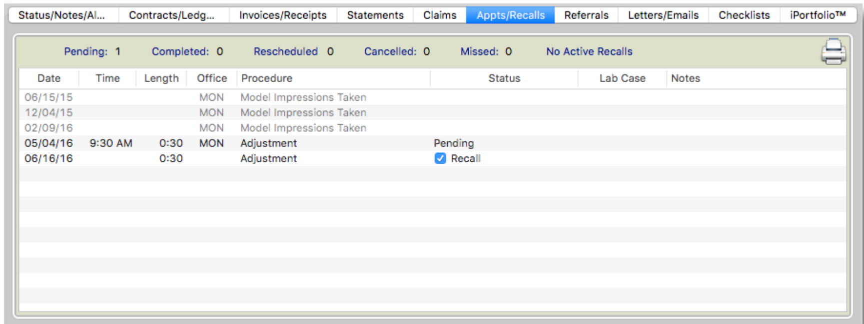


Figure 5-19: *Appts/Recalls*

This window stores all information about a patient's completed appointments, pending appointments, and if the patient has rescheduled or cancelled appointments. This window also displays all pending and scheduled Recalls and Labs. To view an appointment, double-click on it. topsOrtho opens the Appointment Book and spotlights the appointment for you. You can also print a list of all appointments and recalls for the patient, both completed and pending.

Referrals

Referrals are divided into three sections:
Referred In:
Referred Out:
Has Referred:

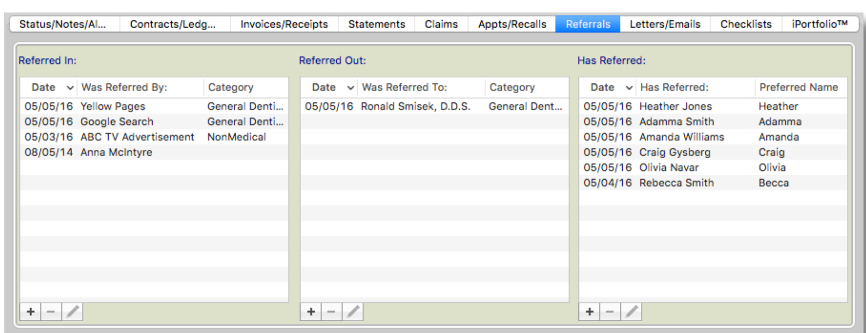


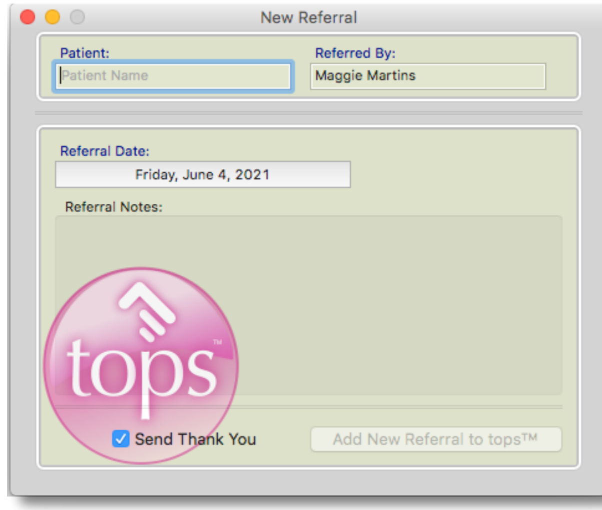
Figure 5-20: *Referrals*

This window keeps track of who the patient was referred by, who the patient was referred to (oral surgeon, etc.) and who the patient has referred into the practice.

You can also add/delete names manually using the + and - buttons at the bottom of each column. You can edit referrals by selecting the pen.

If you add a new referral you can select the individual referred by and add the referral to topsOrtho. Select the date to edit the creation date.

Be sure to create a thank you letter for the referral! This will be discussed in the next lesson.



Letters/Emails

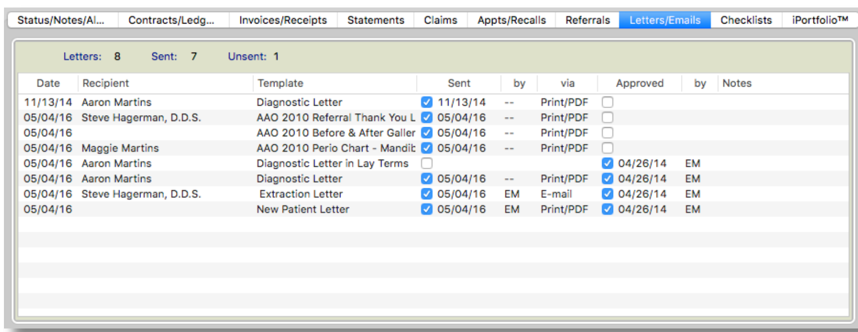


Figure 5-21: *Letters/Emails*

Each time you create a letter for, or about, a patient, it is stored in this window. Once you print, email or preview the letter, topsOrtho automatically marks the letter as Sent and the status will be displayed in the Letter list. If you need to open a letter double click on the letter from the list. You have the option of opening the letter, deleting it, or opening the referral information. Deleting a letter requires a password and the appropriate privilege set in Practice Setup... Once rollover has occurred, you are not able to modify the letter unless you copy and paste the text into another document. It will be locked.

Checklists

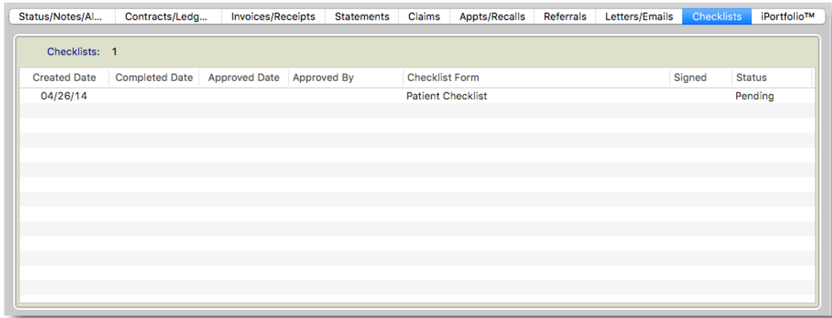


Figure 5-22: *Checklists*

Each time you complete a checklist for, or about, a patient, it is stored in this window. This is the area you approve checklists. Checklists are created in Practice Setup. Creating a checklist requires a password and the appropriate privilege set in Practice Setup.

iPortfolio™

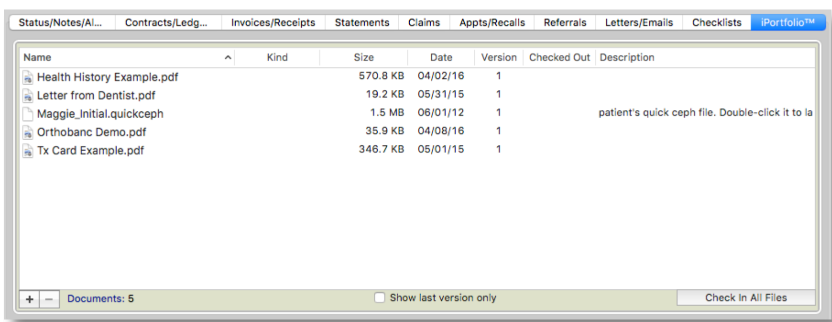


Figure 5-23: *iPortfolio*

iPortfolio allows you to store any digital information in this window. It's as easy as dragging the item in. You can click the + (plus) at the bottom to locate a folder, or if the item is on the desktop, just drag and drop. Deleting a letter requires a password and the appropriate privilege set in Practice Setup... Also, you can drag and drop multiple files into iPortfolio. If an image may be better suited for the Image Browser a warning will display. To move the file to the Browser, select the Open Image Browser... button and drag the image over.

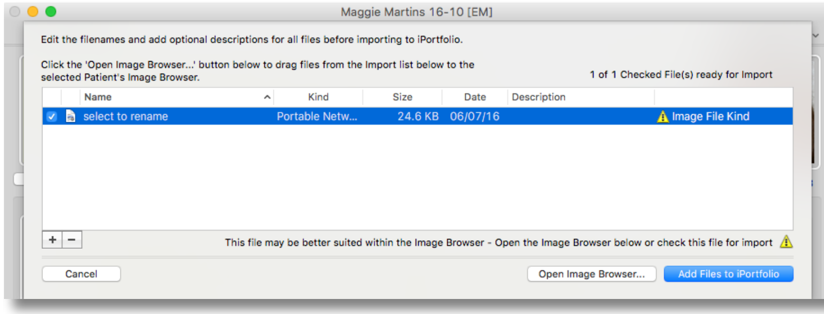
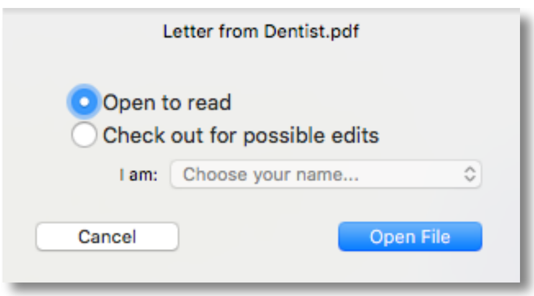
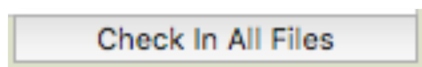


Figure 5-24: *iPortfolio*

You can open and check out a file for editing. Once you have checked out a document, no one else can check it out until you check it back in; others will have read-only access. This prevents two people from editing the document at the same time.





To check in a document click the Check In All Files located at the bottom right of your window.

Summary

In this lesson, you should feel confident with:

- Creating a new patient
- Understanding the sections of Patient Information - Admin

Lesson 6 Referrer Management

Lesson Six Overview

This lesson focuses on creating and managing referrers. There are three types of referrals: A patient is referred *in* by a person or dentist, can be referred *out* to another doctor, and can refer *other* patients to your practice. Also covered will be creating letters to the referring individual.

Objectives:

To become familiar with referrer management, you will:

6A **Create a New Referrer**
Referrers are an important part of your practice.

6B **Edit Referrer Information**
Modify referrer information to ensure that all your referrers are kept up-to-date.

6C **Refer a Patient**
If you need to refer a patient to a specialist, you'll want topsOrtho to keep track of this referral in both the patient and referrer information windows.

6D **Open the Referral Analysis Report**
See how much any specific referrer has provided to your practice.

6E **Write and Send a Referral Thank You Letter**
Create letters and print to mark as Sent in Patient Information.

6A Creating a New Referrer

To keep track of all referrers, you must have a comprehensive list. Creating a referrer is very similar to creating a new patient in topsOrtho. First you search for the referrer by name; if they are not in your database, you will create a new one. Once a referrer is created, you can quickly create a letter or use them for future referrals. Remember, Referrers are also listed in the Patient Information window.

Creating a New Referrer

1. From the menu, select View.
2. And, Referrer Info…

Keyboard Shortcut
Command + R

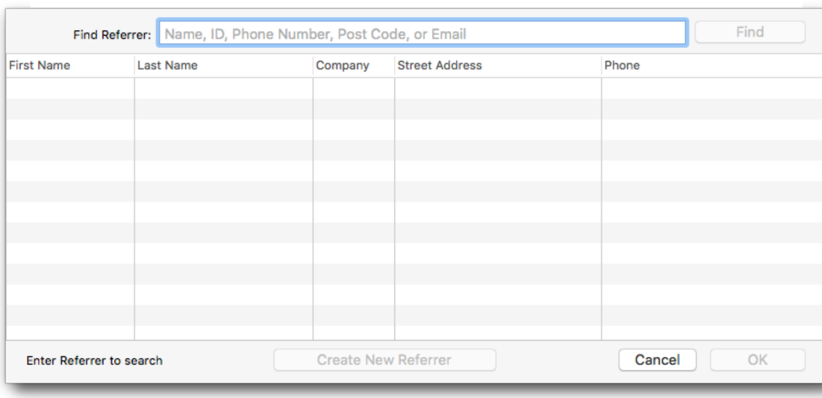


Figure 6-1: *Referrer Info*

3. Using the search criteria, enter the first three characters of the first and last name.

   The search feature searches the database for first and last names, not titles. For example, searching for Dr. Smith will not display any referrers unless the referrer's first name is Dr.

4. Select OK. If there is not a matching name you need to create a new referrer.
5. Create New Referrer.

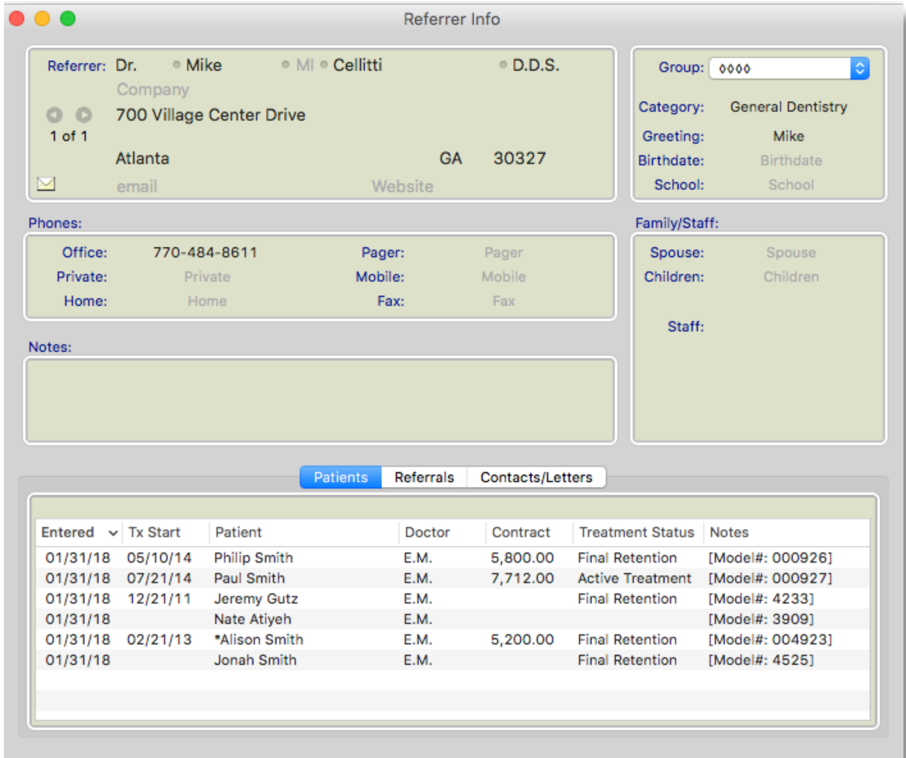


Figure 6-2: *Referrer Info*

Remember you use the Tab key to move from field to field.

6. Enter as much information as you can, tab to move from field to field.

   The Group drop down arrow can be used to rate the individual on referrals or any other criteria you want.

   The lower portion of the window displays the patients, referrals, and contacts/letters concerning this referrer.

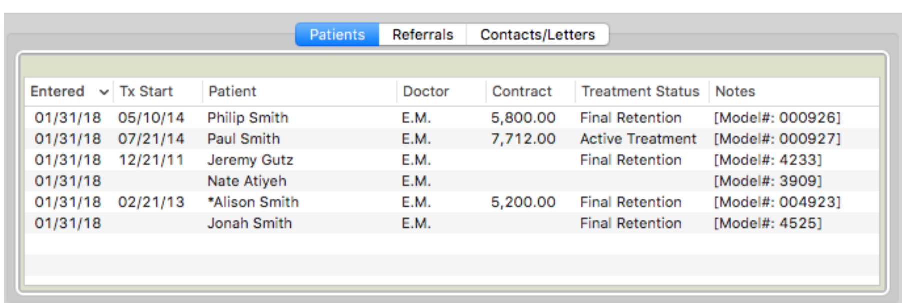


Figure 6-3: *Patients Referred*

Displayed is a list of that dentist's patients that you are currently treating and their treatment status. This information comes from the Patient Information–Admin window when you select the patient's dentist. From this list, you can see the date the patient was entered into topsOrtho and his treatment status. The Treatment Status comes from the Patient Information–Admin window, Tx Status. (You can see how important it is to enter complete information in Patient Information...many lists, reports and other windows in topsOrtho use information from Patient Information!)

This information can also be obtained by:
1. From the menu, select View.
2. And Patients of Referrer...
3. Search for the referrer's name.
4. Select Find. The patients will be displayed.

Viewing a Patient's Information

1. Double-click on a patient from the Patient List displayed to open their Patient Information window.

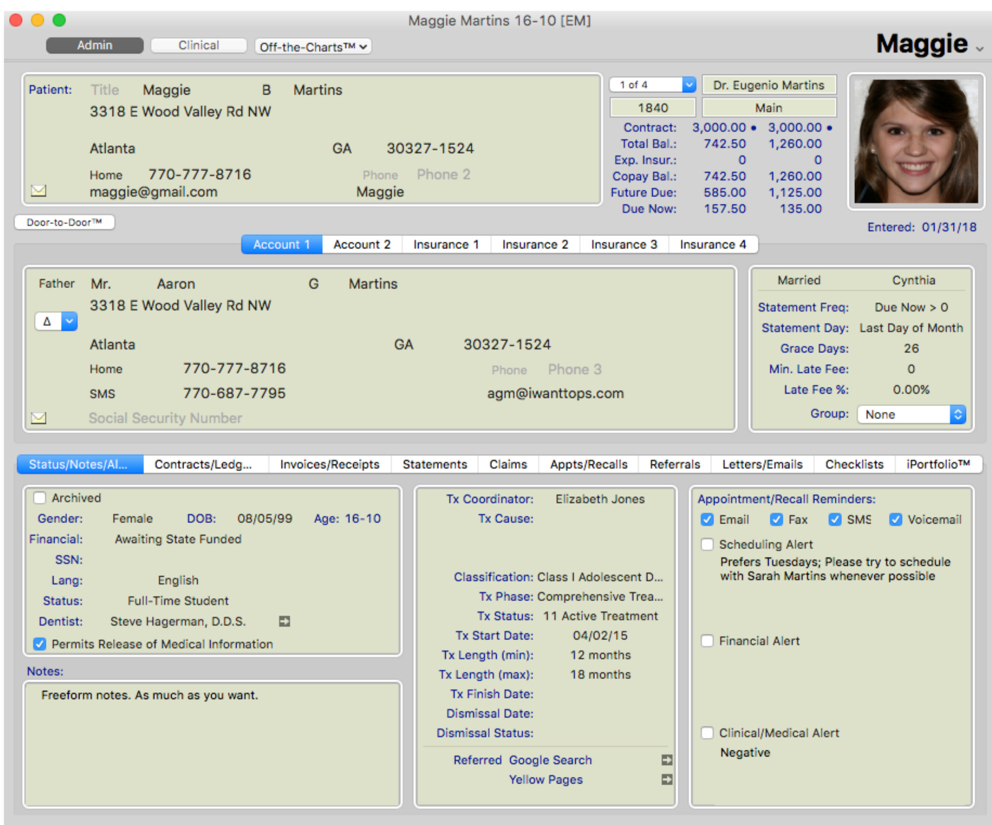


Figure 6-4: *Patient Information from Referrer Information*

2. Close the Patient Information window.

Viewing the Referrals

1. From the Referrals window, click the Referrals tab.

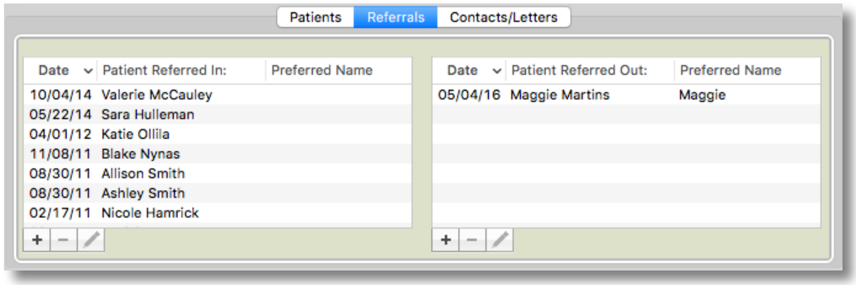


Figure 6-5: *Referrals*

At left are patients who have been referred in to your practice. At right, your patients who you have referred out to this individual.

2. Double-click on the patient's name to open their Patient Information window.

This information can also be obtained by:
1. Click View from the menu bar.
2. Click Patients Referred From... OR Patients Referred To...
3. Search for the referrer's name.
4. Click Find. The patients will be displayed.

Add, Delete or Edit a Referral Date

Anywhere you see the plus (+), minus (-), or edit (pen) buttons you can add, delete or edit the referral date.
1. To add, click the plus (+) button and search for or enter a new referrer.
2. To delete, select the referrer from the list you wish to remove and click the minus (-) button or command + delete. In order to delete a referrer there must not be any associated letters, patients or referrals.
3. To edit the referral date, click the pen button, enter your password and chose the appropriate date.
   If you need to edit the referral information, like address or phone number, open the referrer info (command + r), search for the referrer, and edit.

Verifying Letters

1. Click the Contacts/Letter tab.

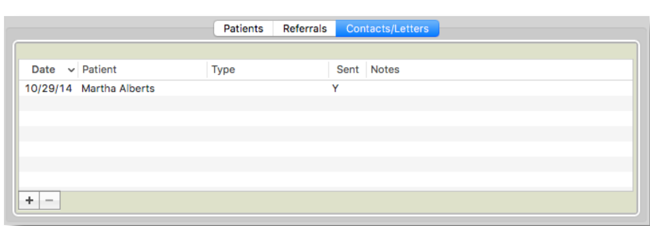


Figure 6-6: *Contacts/Letters*

If you have created a letter to a referrer, it will be listed here. This does not mean it has been sent. In Figure 6-6, the N (No) under the S (Status) column indicates that you have not printed or previewed the letter. Once you have printed or previewed the letter, it will be checked in the Patient Information window and the N will change to a Y.

This information can also be obtained by:
1. Click View from the menu bar.
2. Click Contacts/Letters with Referrer...
3. Search for the referrer's name.
4. Click Find. The patients with letters will be displayed.

6B Editing Referrer Information

To quickly see a list of your referrers, along with their addresses and phone numbers, you can compile a list. From this list you can double-click and open the Referrer information. From here you can edit any information required, and also filter the Referrer List by categories.

Modifying a Referrer

1. Click Matrix from the menu bar.
2. Click Referrers. Accessing referrers requires a password and the appropriate privilege set in Practice Setup.

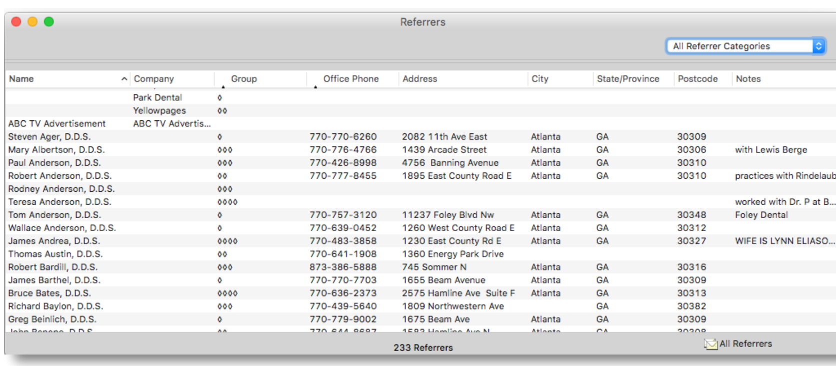


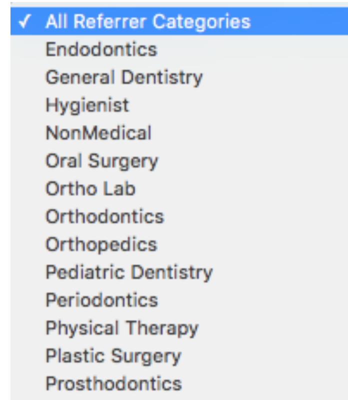
Figure 6-7: *Referrer List*

3. Double-click on a referrer's name to open the referrer's information. Or open the referrer information separately, by pressing command + r and searching for the referrer.
4. Edit the information as needed.
5. From the referrer list, you can select one or several referrers and click the envelope at the bottom left to add them to your envelope/label list.

You can filter the referrer list by the categories that are specified in the topsOrtho menu by clicking the drop down arrow and selecting the category.

6C Referring a Patient

There will be times when you need to refer a patient to a specialist, such as an oral surgeon or endodontist. That referral should be added to both the patient and referral information.



Viewing Referrer Information

1. Click Action from the menu bar.
2. Click Refer Patient To...

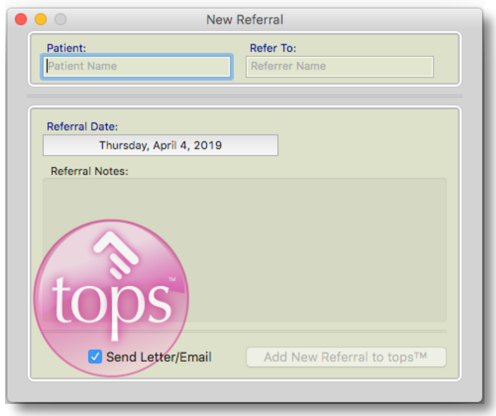


Figure 6-8: *New Referral*

3. Enter the patient's name and press Tab.
4. Enter the specialists' name. If the name is not in topsOrtho you will need to add the name from this window.
5. Click the date and select appropriate referral date, if necessary.
6. Click in the Referral Notes section to add notes.
7. Click Add New Referral to tops.

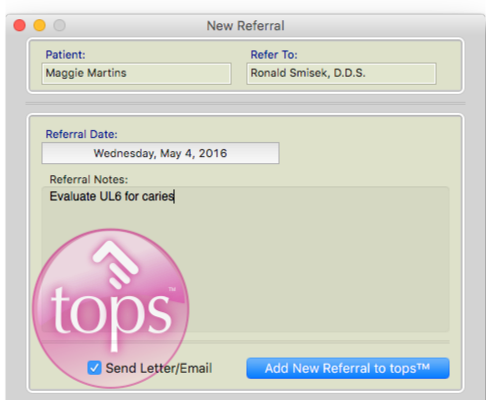


Figure 6-9: *Completed Referral*

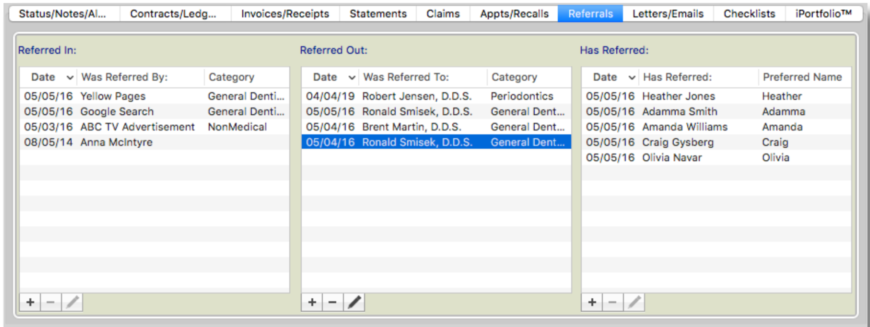


Figure 6-10: *Referral Out added to Patient Information*

The Referral Out was added to both the Patient Information and Referrer Into windows.

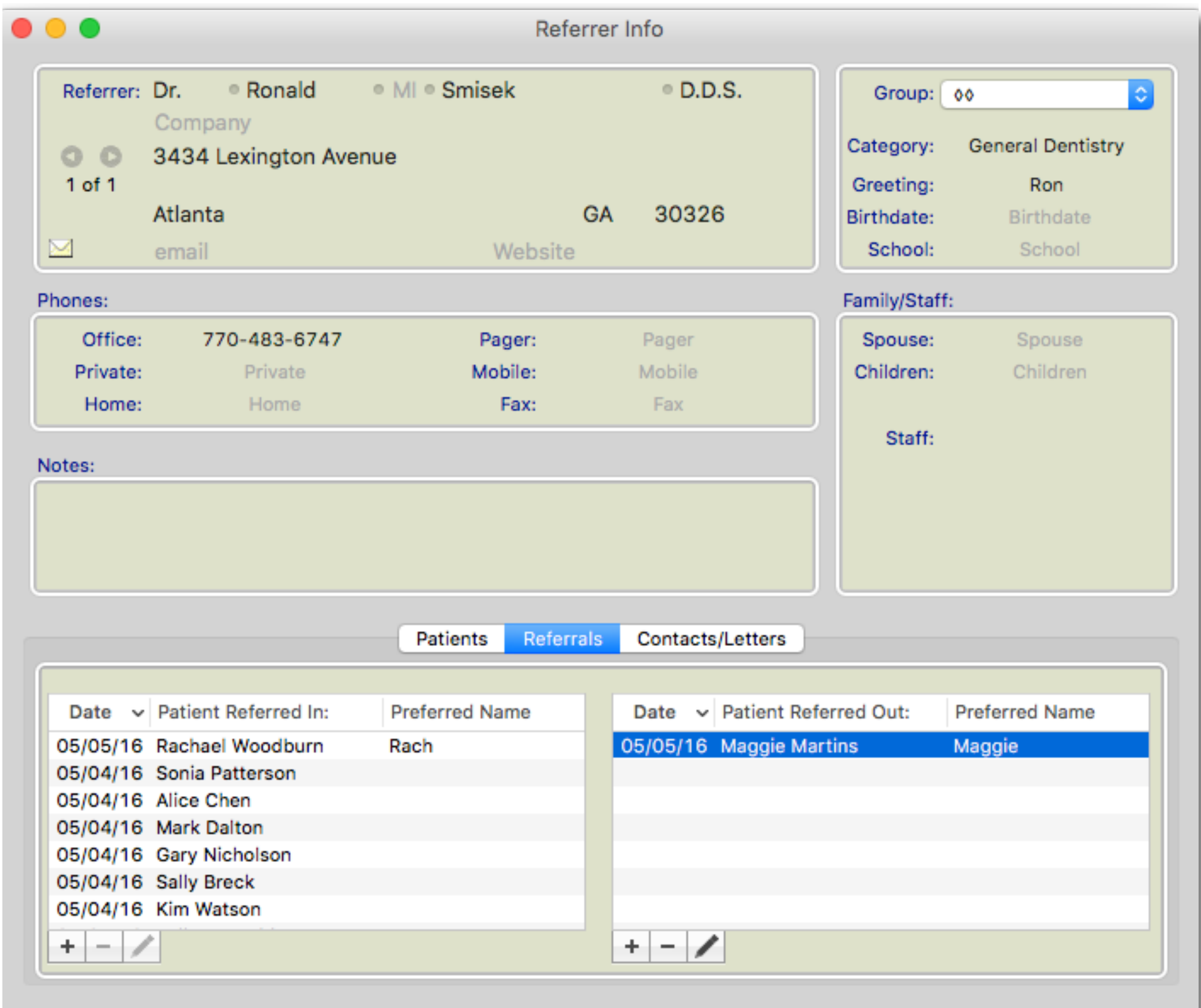


Figure 6-11: *Referral Out added to Referrer Information*

6D Referral Analysis Report

topsOrtho offers a report that you can run to see the number of patients an individual has referred to your practice, as well as the money received from these referrals over a six-month period. This report shows both patient and doctor referrals. The date entered into the report is the last month of the six-month period included in the report.

Running the Referral Analysis Report

1. Click Reports from the menu bar.
2. Click Referrals Analysis.

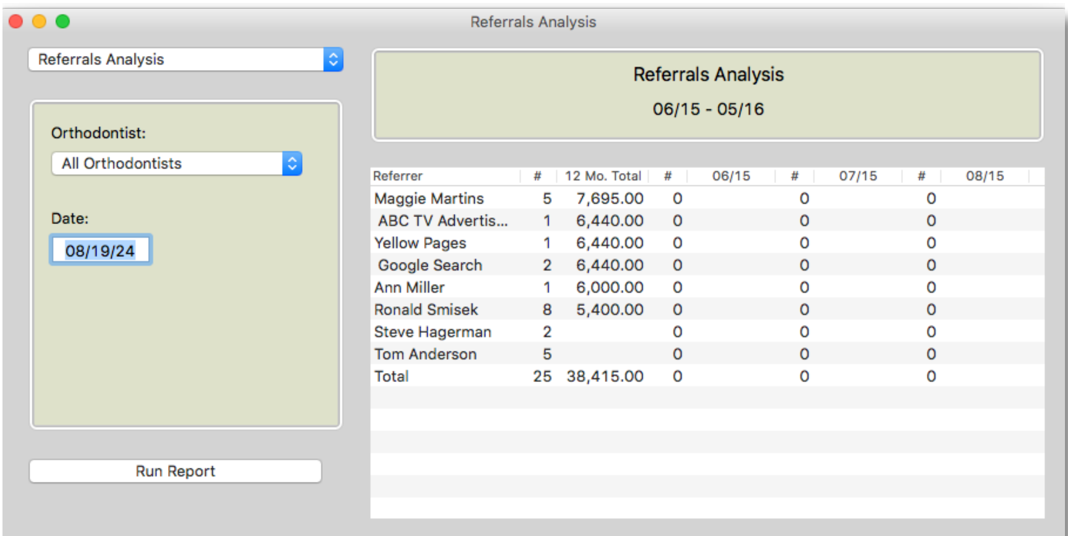


Figure 6-12: *Referral Analysis Report*

The left column displays the individuals that have referred patients to your practice. These individuals could be current or past patients, or they could be doctors. The number directly to the right of their name indicates the number of patients they have referred to you in the six months during the designated reporting period, with corresponding production amounts. The example report indicates that the patients were referred in May, with the production generated in May.

If there is no money associated with a referral, it may mean they are scheduled for an exam and have not yet activated a contract.

Viewing a Different Twelve Month Period

1. Enter an ending date for the twelve month range.
2. Click Run Report.
3. The report will generate, displaying the twelve months prior to the date you entered.

6E Writing a Referral Thank You Letter

When someone refers a patient to your practice, you may want to send them a personal letter of thanks. topsOrtho keeps track of these letters in the Patient Information window. You can also mark a letter as Sent; once you do this, the letter will be marked in both the Patient and Referrer Information windows.

Keyboard Shortcut
Command + L

Creating a Thank You Letter

Click Action from the menu bar.

1. Click New Letter/Form
2. Click the letter of your choice, press Tab.
3. Enter the patient's name, press Tab.
4. Select the person to whom the letter is being sent.
5. If you select Dentist, the name automatically fills in.
6. Select who is going to sign the letter, press Tab.
7. Type in any notes to be stored in the patient information window. These notes help the office identify the contents of the letter without opening it.
8. Click Add Letter/Form to tops. The letter displays and allows you to make changes. The letter is stored in both the Patient Information and Referrer windows.

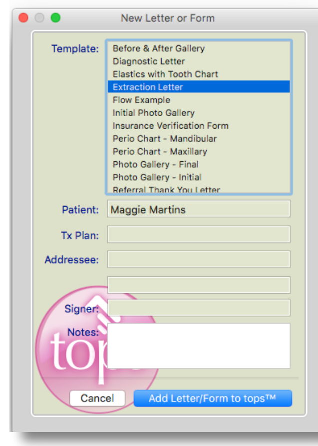


Figure 6-13: *New Letter or Form*

Figure 6-14: *Addressee*

Printing or Emailing a Letter

1. Click File from the menu bar.
2. Click Print or Email.
3. Follow the instructions for your printer or to email letter.

Viewing a Letter in Patient Information

1. Open the Patient Information window.
2. Click Letters/Emails. The letter has been added and marked as sent.
3. Right click to view contextual menu for more options. Deleting letters requires you to enter your password.

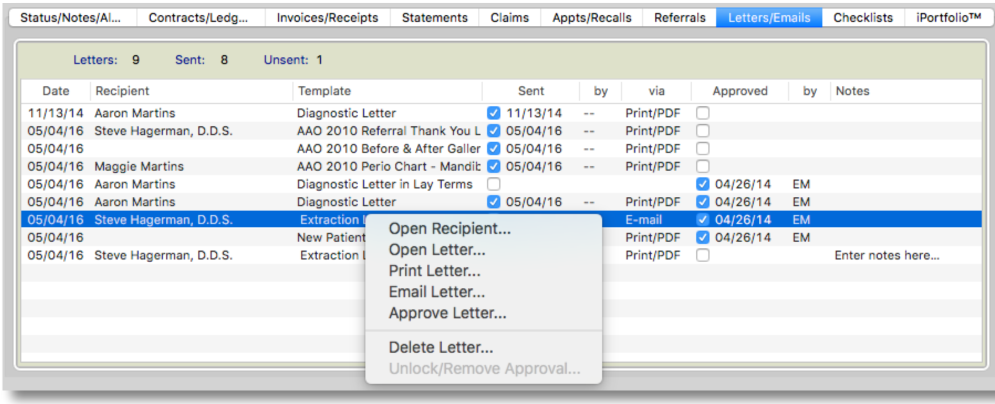


Figure 6-15: *Patient Information window*

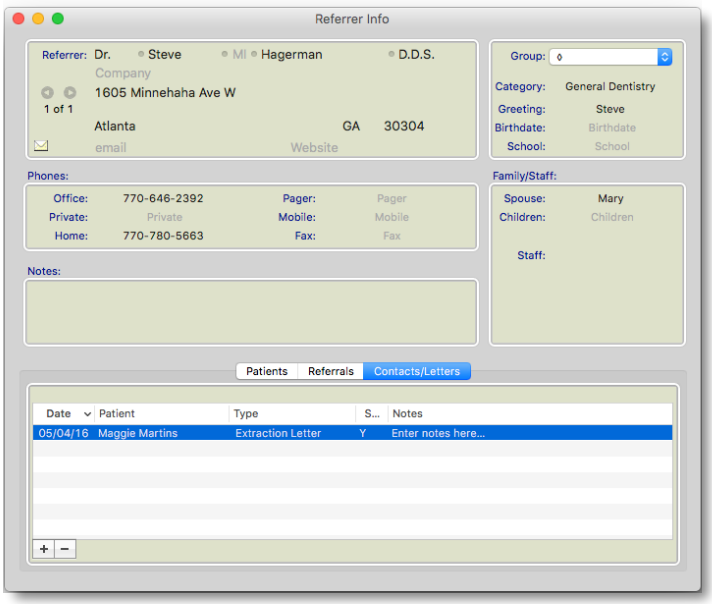


Figure 6-16: *Referrer Info Sent Letter Indicated*

Summary

In this lesson, you should feel confident with:

- Creating a new referrer
- Editing referrer information
- Referring a patient
- Using the referrer list
- Interpreting the Referral Analysis Report
- Creating a referral thank-you letter

Lesson 7 Typical Patient Appointments

Lesson Seven Overview

This lesson focuses on creating a typical patient appointment in topsOrtho. This includes all steps from checking a patient in to checking them out.

Objectives:

To become familiar with typical patient appointments, you will:

7A **Check a Patient In**
Watch Patient Flow for patients that have checked in.

7B **Seat Patients in the Clinic**
Modify Patient Flow when you have seated a patient in the clinic

7C **Enter Treatment Notes**
Creating treatment notes for your patient after they are finished in the clinic.

7D **Dismiss a Patients from the Clinic**
Modify Patient Flow when you are finished with your patient.

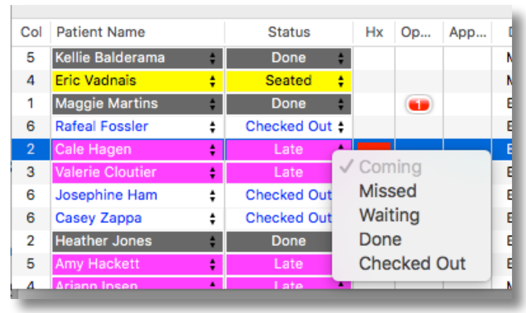
7E **Make Followup Appointments**
From Patient Flow you can make your patient's next appointment.

7F **Enter Payments, Printing Slips**
Enter payments into the patients ledger and print slips.

7G **Check Patients Out**
Modify Patient Flow when the patient has left your office.

7A Checking a Patient In

If your office has a check-in station, the patient will check in himself according to the instructions at your Check-in station. If your practice does not have a check-in station, you will check in patients at the Front Desk with Patient Flow. This ensures that clinic personnel know the patient is waiting in your reception area.

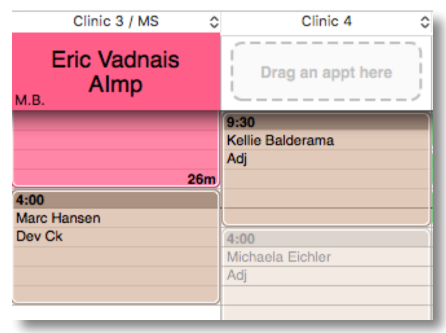


Manual Checking in a Patient.

1. Open Patient Flow.
2. Click the Patient Status located to the right of the patient's name.
3. Click Waiting status.

7B Seating Patients in Clinic

Once the clinic staff sees that a patient is Waiting, that is their signal to come to the reception area and take the patient back to the clinic.



Seating Patients in the Clinic

1. From the Reception View.
2. Drag the patient from the schedule portion of Patient Flow to the chair they will be seated in and select your name from the list.

7C Entering Treatment Notes

Treatment notes should **always** be entered for a patient on the same day he was seen. Once you add a treatment note to a patient's file, it becomes part of his permanent record after rollover. Once rollover has occurred, you cannot modify the note. You can, however, modify today's note prior to rollover tonight. **Note:** Once you seat a patient, a treatment note is automatically created for you.

Adding a Treatment Note:

1. Open Patient Information.
2. Click Clinical button.
3. Click Tx Note radio button.

Keyboard Shortcut
Command + 0

Patient Information - Clinical
Tx Notes

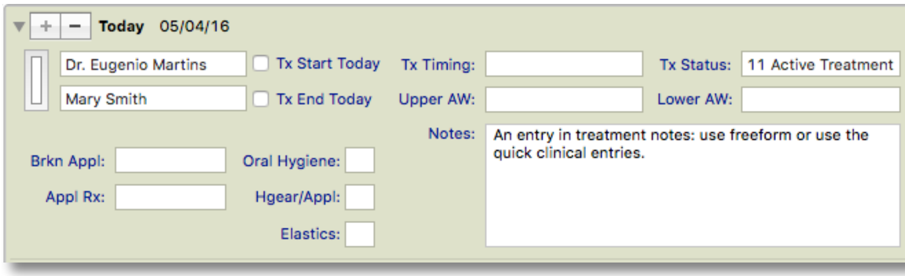


Figure 7-1: *Treatment Notes*

It’s essential to enter treatment notes. By entering the next procedure, you are advising the front desk about the patient’s next appointment, since this information appears in Patient Flow.

Treatment notes may be viewed in Patient Information as well as in a list. You can select a name as the person responsible for the note, and color-code the note, if desired. Each item is fully customizable for your practice in Practice Setup.

You can create only one treatment note per patient per day in topsOrtho, but you can add to the note later in the day if you need to make additions. Once rollover occurs, however, the note is static and cannot be modified or deleted.

If you access Treatment Notes from Patient Flow the doctor and assistant will be pre-filled. If not, you will be asked to pick the Doctor and Assistant.

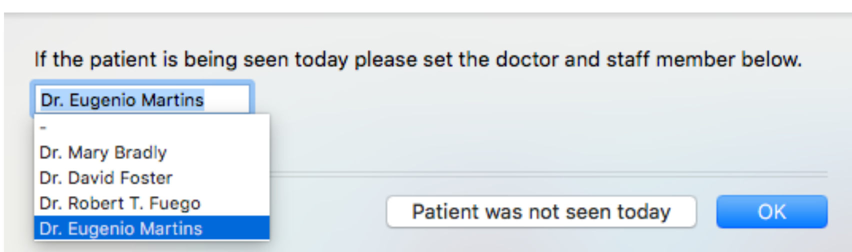
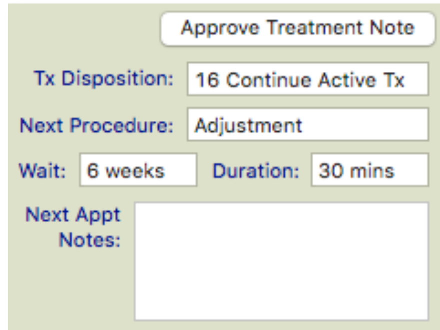


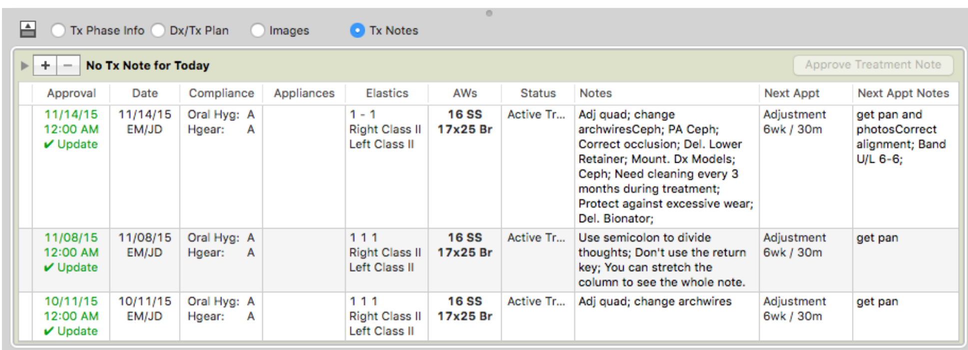
Figure 7-2: *Treatment Note Doctor & Assistant Selection*

You can also search for a patient, click the Clinical button, click the + plus to add a new treatment note. If the patient was not seen today, and you are making a treatment note for another reason, click the Patient was not seen today button. Use the Tab button to move between fields in the treatment notes area.

Continue to enter information in the treatment note. Notes can be freeform and will appear on a treatment note list. Add brackets and elastic configurations directly on the tooth chart, they will display as you scroll through note history. Elastics will shown in the Elastic field. Select the Tx Status from the list. Tx Status is where the patient currently is in treatment.

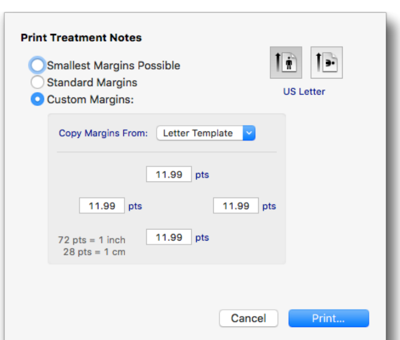
You must enter a Tx Disposition to enter the next appointment information. Disposition means generally where the patient is headed next in treatment. This section should always be filled out. It advises the front desk of the patient's next appointment and will allow them to use the search feature in topsOrtho. You can approve the Treatment Note when it's complete, or at the end of the day in the Treatment Notes Matrix, or they will lock automatically at rollover.



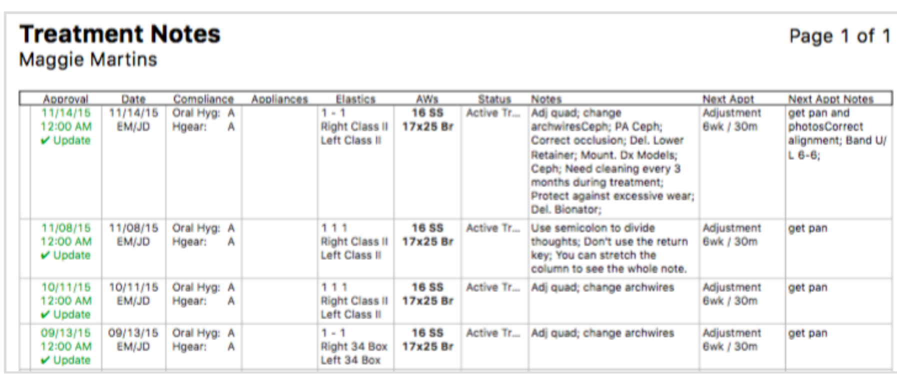


Approval	Date	Compliance	Appliances	Elastics	AWs	Status	Notes	Next Appt	Next Appt Notes
11/14/15 12:00 AM ✔ Update	11/14/15 EM/JD	Oral Hyg: A Hgear: A		1 - 1 Right Class II Left Class II	**16 SS 17x25 Br**	Active Tr...	Adj quad; change archwiresCeph; PA Ceph; Correct occlusion; Del. Lower Retainer; Mount. Dx Models; Ceph; Need cleaning every 3 months during treatment; Protect against excessive wear; Del. Bionator;	Adjustment 6wk / 30m	get pan and photosCorrect alignment; Band U/L 6-6;
11/08/15 12:00 AM ✔ Update	11/08/15 EM/JD	Oral Hyg: A Hgear: A		1 1 1 Right Class II Left Class II	**16 SS 17x25 Br**	Active Tr...	Use semicolon to divide thoughts; Don't use the return key; You can stretch the column to see the whole note.	Adjustment 6wk / 30m	get pan
10/11/15 12:00 AM ✔ Update	10/11/15 EM/JD	Oral Hyg: A Hgear: A		1 1 1 Right Class II Left Class II	**16 SS 17x25 Br**	Active Tr...	Adj quad; change archwires	Adjustment 6wk / 30m	get pan

This area contains all the Treatment Notes for a patient. You can change the size of a column to display more of the information in that column, or click on the note to expand.



Print the Treatment Notes from the tops menu by first, clicking on a treatment note, then select Print, choose your margins, and select the Print button.



Treatment Notes Page 1 of 1
Maggie Martins

Approval	Date	Compliance	Appliances	Elastics	AWs	Status	Notes	Next Appt	Next Appt Notes
11/14/15 12:00 AM ✔ Update	11/14/15 EM/JD	Oral Hyg: A Hgear: A		1 - 1 Right Class II Left Class II	**16 SS 17x25 Br**	Active Tr...	Adj quad; change archwiresCeph; PA Ceph; Correct occlusion; Del. Lower Retainer; Mount. Dx Models; Ceph; Need cleaning every 3 months during treatment; Protect against excessive wear; Del. Bionator;	Adjustment 6wk / 30m	get pan and photosCorrect alignment; Band U/L 6-6;
11/08/15 12:00 AM ✔ Update	11/08/15 EM/JD	Oral Hyg: A Hgear: A		1 1 1 Right Class II Left Class II	**16 SS 17x25 Br**	Active Tr...	Use semicolon to divide thoughts; Don't use the return key; You can stretch the column to see the whole note.	Adjustment 6wk / 30m	get pan
10/11/15 12:00 AM ✔ Update	10/11/15 EM/JD	Oral Hyg: A Hgear: A		1 1 1 Right Class II Left Class II	**16 SS 17x25 Br**	Active Tr...	Adj quad; change archwires	Adjustment 6wk / 30m	get pan
09/13/15 12:00 AM ✔ Update	09/13/15 EM/JD	Oral Hyg: A Hgear: A		1 - 1 Right 34 Box Left 34 Box	**16 SS 17x25 Br**	Active Tr...	Adj quad; change archwires	Adjustment 6wk / 30m	get pan

7D Using the Tooth Chart

The 3D Tooth Chart allows you to place brackets and elastics to match each patient's current orthodontic situation. Update the tooth chart to reflect bracket and elastic changes. As you move through Treatment Notes, changes will be shown on the tooth chart. You can customize brackets and elastics, display brackets and elastics, remove teeth, and email or print images from the tooth chart.

1. Set up bracket and elastic types in Practice Setup... Labels: Bracket Color and Elastic Size.
2. From the clinical chart, select the Tx Notes + button.

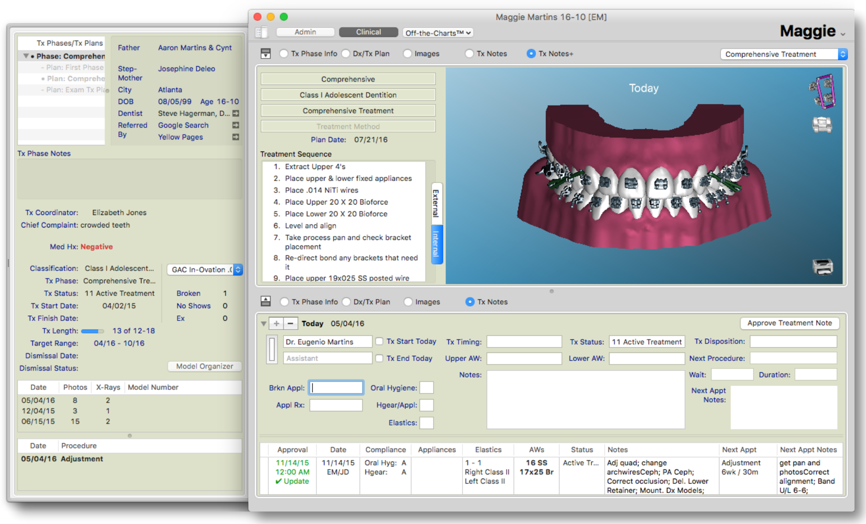
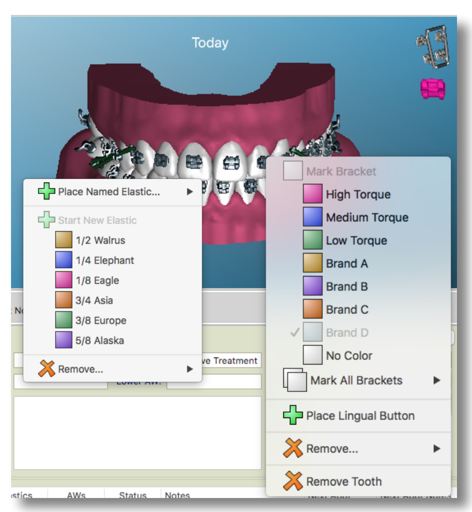


Figure 7-3: *Tooth Chart*

3. To place or change brackets, click the Bracket icon, or right-click on the tooth chart. Select the bracket type and click each tooth or select Place All Brackets.
4. To place or change elastics, click the Elastics icon, or left-click on the tooth chart. Select the elastics type and click the starting bracket and each bracket where the elastic will connect. If you're making a box or triangle, click all the brackets where the elastic connects.To finish, quickly click the bracket where the elastic began, forming a loop. **Remember,** you must close the loop. After you've drawn an elastics, you can click on the elastic again and select Name this Elastic. That way in the future that configuration can be easily placed in the future.



5. Update the tooth chart to match the patient's brackets and/or elastics at each appointment and make the necessary treatments notes as explained above.

7E Dismissing Patients from the Clinic

Once you have entered your treatment notes you are ready to dismiss the patient from the clinic.

1. Click Patient Flow if necessary.
2. Click on the Patient Status to the right of the patient's name.
3. Click Done status to indicate that you are done with the patient in the clinic.

7F Making Followup Appointments from Patient Flow

Once the clinic has changed the patient's status to Done, you are ready to make the follow-up appointment based on information from the treatment note.

1. Click Patient Flow if necessary.
2. Click to the right of the patient's status. The Next Appointment Information appears.
3. Click on Search for Next Appointment to start the search based on the information that was entered in the clinic.

7G Taking Payments, Printing Slips

Sometimes at checkout, a patient wants to make a payment to his account. This section focuses only on a simple transaction with no discounts. You will take a payment from the patient, print a next appointment slip, and print a receipt for the payment.

Transactions in topsOrtho can be a number of things, such as charges and payments, positive or negative adjustments. Regardless of the type of transaction you perform, the process is the same. All transactions will be posted to the patient's ledger and tracked through reports. To use transactions properly, be sure to specify what kind of payment you are accepting when a patient or account holder pays a bill. This will make deposits easy to verify.

Keyboard Shortcut
Command + T

Posting Payments

1. Click Action from the menu bar.
2. Click New Transaction.

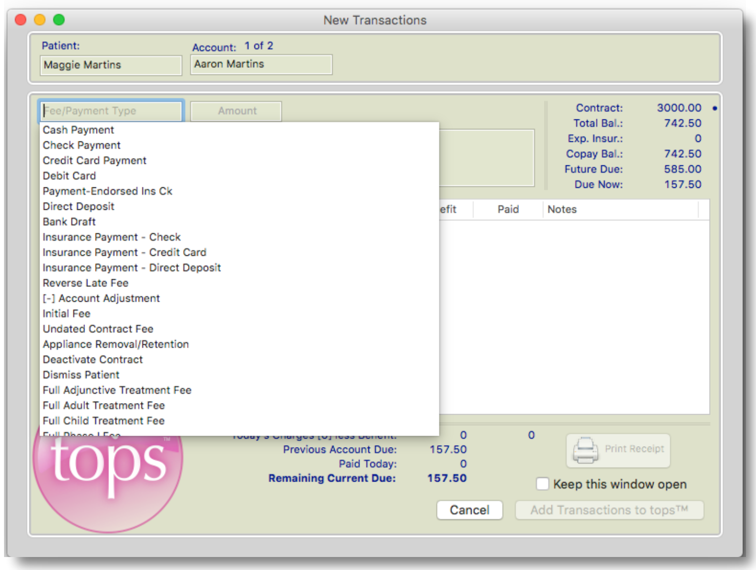


Figure 7-4: *New Transaction window, Fee Payment Type*

3. Type in the patient's name and press Tab.
4. If necessary, select the account holder from the Account selection list, press Tab.
5. Choose the Fee/Payment Type, press Tab.
6. Enter the Amount without commas or hyphens. Numbers are automatically classified as positive or negative based on the payment type. Depending upon the Fee/Payment type, you will see another area to add additional information such as check number, credit card type, etc.
7. Enter notes. Always give a description of fees and payments. Press Tab to add the transaction into the listing area.

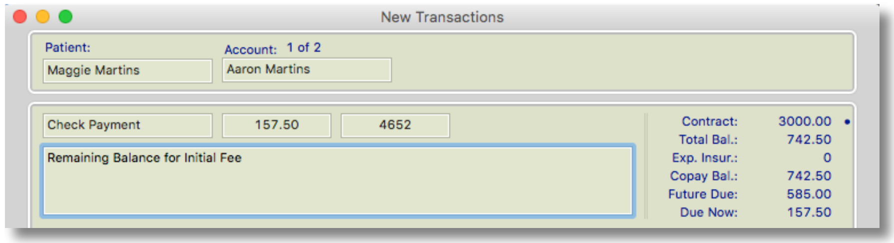


Figure 7-5: *Completed Transaction type and notes*

8. Repeat step 5 through 7 if you want to add more that one transaction to the patient's ledger. Check the Keep this window open checkbox if you have multiple transactions to make.

   If you have added an unwanted transaction to the list, before clicking Add Transactions to tops, click the transaction in the list and choose Clear from the Edit menu, or use the shortcut Command + Delete.

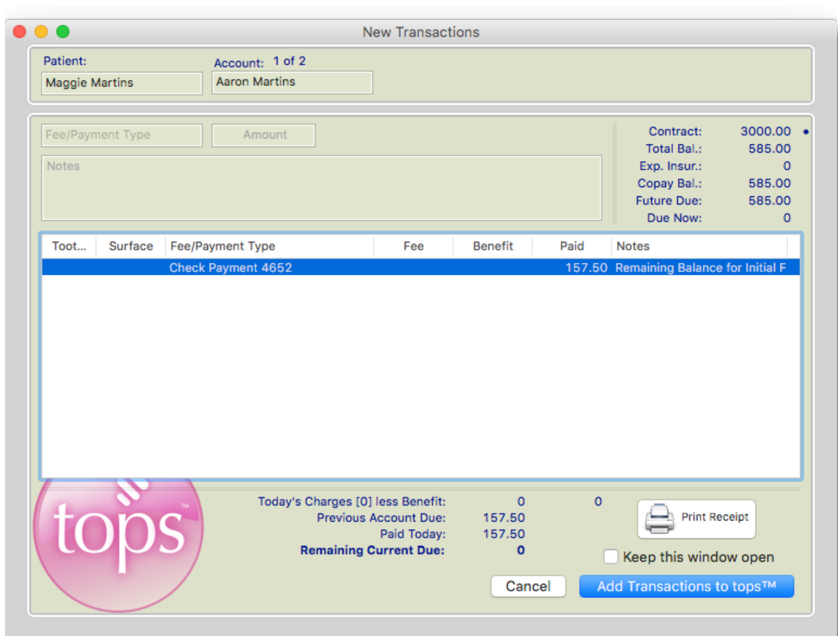


Figure 7-6: *Filled in Transaction window*

9. Verify first, then click Add Transactions to tops. You can also print a receipt directly from the New Transaction window. Be careful; the transaction will automatically be added to topsOrtho at the same time the receipt is being printed. If you choose to do this, first verify that you have the correct transactions.

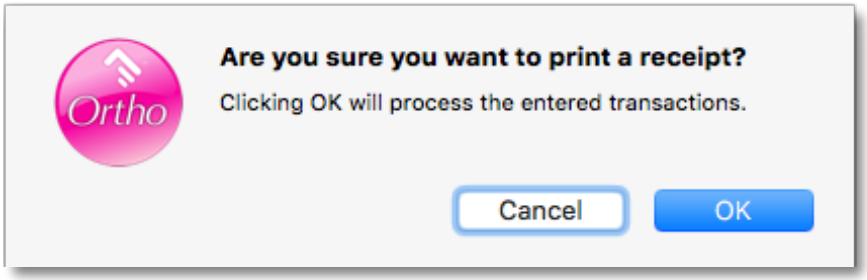


Figure 7-7: *Printing receipts in the New Transaction window*

Keeping the Transaction Window Open
If you have several transaction and would like the transaction window to remain open, place a check in the box beside “Keep this window open” until you are finished entering all of your transactions. To close the window, remove the check.

Printing Slips and Receipts
1. Click and hold on the patient’s appointment on the calendar.
2. Click Print Appointment Slip.
3. Check the appropriate options.
4. Click Print Appointment Slip.

7H Checking Patients Out

Once the patient has left your office, you will need to change their status in Patient Flow to Checked Out. This will prevent any automatic recalls from being made for the patient.

1. Click Patient Flow if necessary.
2. Click on the Patient’s “Done” status.
3. Click Checked Out.

Summary

In this lesson, you should feel confident with:

- Checking in patients
- Seating patients in the clinic
- Entering treatment notes
- Dismissing patients from clinic
- Making follow up appointments
- Checking out patients

Lesson 8 Ending the Day

Lesson Eight Overview

This lesson focuses on ending the day with topsOrtho. topsOrtho automatically completes most duties associated with the end of the work day, such as creating recalls for missed appointments, advancing to the next calendar day and generating backup files.

Objectives:

To become familiar with ending the day with topsOrtho, you will:

8A **Learn about End of the Day - Automated Tasks**
topsOrtho automatically performs most duties associated with the end of the work day.

8B **Manage Patient Flow**
Mark all patients as “Checked Out” or “Missed”. This allows topsOrtho to create automatic recalls.

8C **Manage Clinical Treatment Notes**
Make sure that all patient treatment notes for the day have been entered in topsOrtho. Treatment notes cannot be edited once rollover occurs at midnight.

8D **Create Appointment List for the Next Day**
To ensure that everything runs smoothly the next day, create an appointment list with various types appointments.

8E **Back up topsOrtho**
Backing up helps prevent data loss if a server crashes or an emergency occurs.

8A End of the Day - Automated Tasks

Each night after midnight, topsOrtho will perform a variety of tasks automatically for you. These automated features will ensure that when you arrive the next day you are ready to start the day immediately. Some of the automated duties performed are:

- Advancing the calendar
- Marking appointments as missed if the patient never signed in
- Charging contract fees
- Generating insurance claims
- Recording pre-payment entries
- Sending data to your website if you use T.Link or OrthoSesame
- Deactivating contracts that have been charged in full
- Charging late fees
- Generating statements for each account
- Generating the daily backup file

A rollover detail report displays all transactions that occurred after rollover. You can select criteria for the report.

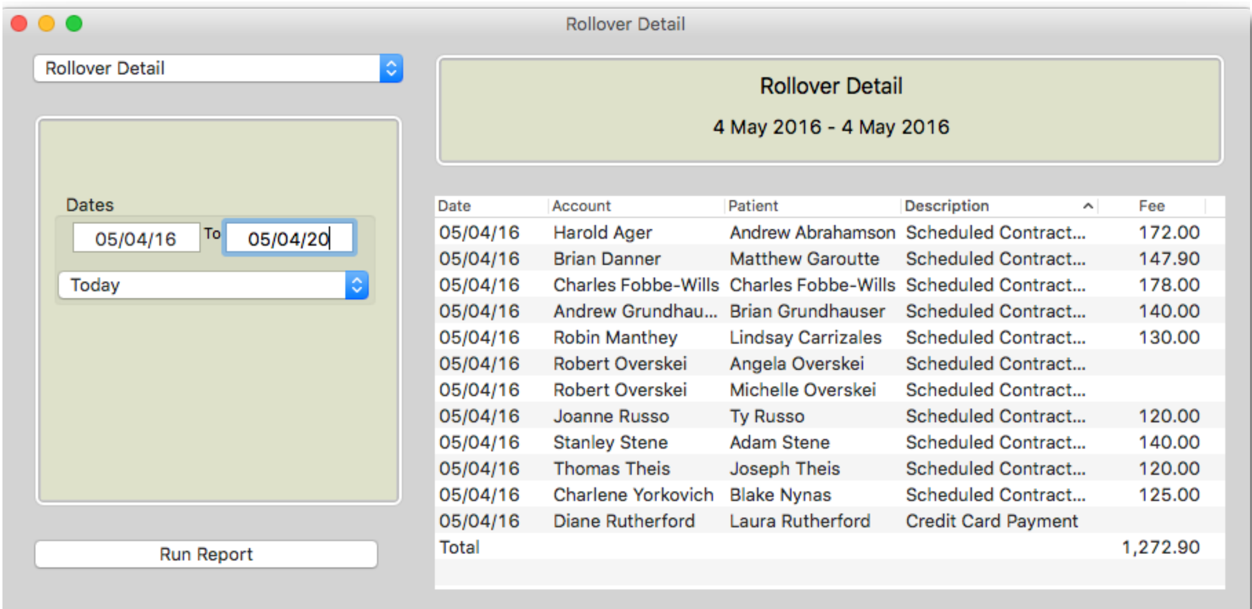


Figure 8-1: *Rollover Transaction Report*

Creating a Rollover Transaction Report

1. Click Reports from the menu bar.
2. Click Rollover Detail.
3. Click the arrow to select a different date criteria.
4. Click Run Report.

8B Managing Patient Flow

As you've learned, Patient Flow is how a patient is tracked through the practice. Once a patient has left your practice, he should be marked as "Checked Out." This instructs topsOrtho to mark the appointment as Completed in the Patient Information window. If a patient has not checked in for his appointment, topsOrtho will automatically mark him as Missed during rollover. The appointment is placed in the Recall window in the Appointment Book drawer and an automatic recall is generated for you. The appointment also displays as Missed in Patient Information.

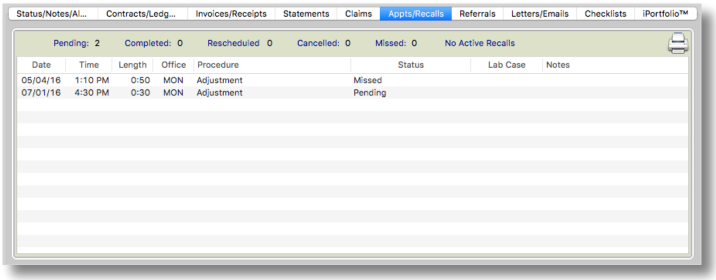


Figure 8-2: *Missed Appointment*

Checking Out a Patient

1. Open Patient Flow (if necessary).
2. Change the view to All (if necessary).
3. Mark all patients that have completed treatment today as Checked Out. If they have not checked in, topsOrtho will automatically mark them as Missed during rollover.

8C Managing Treatment Notes

Each patient that was seen in your practice today must have an associated treatment note. This note is saved in Patient Information–Clinical as part of the patient's record. If a treatment note was not entered for the day and rollover occurred, you cannot add a note for that date. topsOrtho provides a report that will allow you to view the patient's treatment notes as well as any missing ones. You can then remind the assistant to create a note for the patient before leaving for the day.

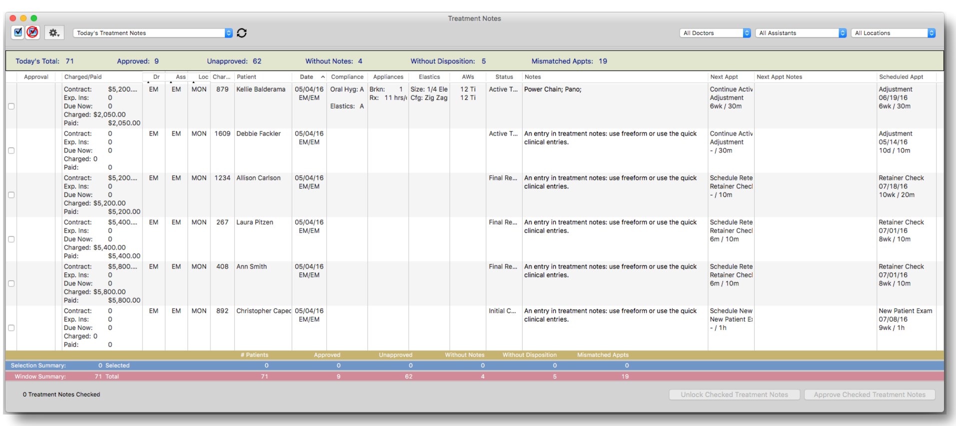
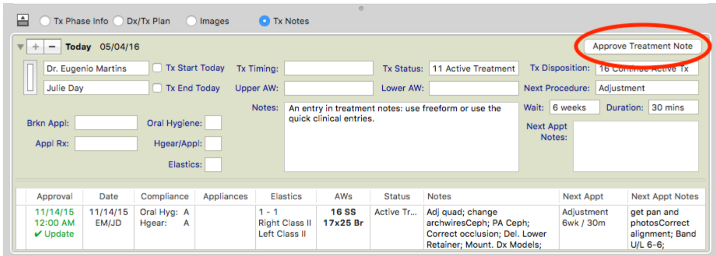


Figure 8-3: *Treatment Notes Matrix*

Viewing Treatment Notes

1. Click Matrix from the menu bar.
2. Click Treatment Notes, at the bottom.
3. From the task menu in the upper left, choose the view you'd like to see.
4. You can verify treatment notes have been added or missed in the Notes column.
5. Double-click on any patient's name to open the patients chart and add the treatment note.
6. You can check and approve treatment notes individually in the Treatment Notes List or directly on the Treatment Note by clicking the Approve Treatment Note button. Or you can approve notes en masse by clicking the checkbox in the Treatment Notes list and clicking the Approve Treatment Notes button. Approving notes locks notes against future edits. Treatment notes will automatically lock at rollover.



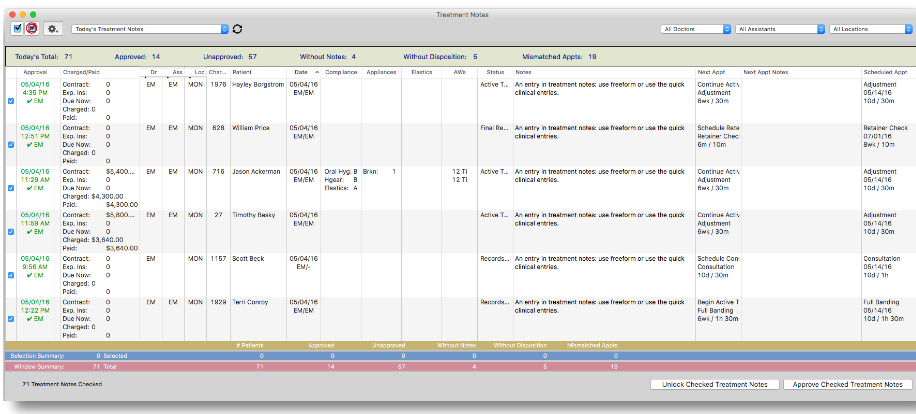


Figure 8-4: *Treatment Note Matrix - Approved*

8D Create Appointment Lists

Each evening you should check the appointment types for the next day to ensure that everything is ready. Do this by opening the appointment list and then selecting the appointment type you want to check.

Creating an Appointment List for Lab Work

1. Click Matrix from the menu bar.
2. Click Appointments.
3. Select tomorrow's date for the ending date and click Use Selected Date Range.
4. Change the Type to Scheduled (if necessary).
5. Change the Treatment Type column header to Lab Work, using the triangle located on the lower left of the header.
6. Sort by the column.

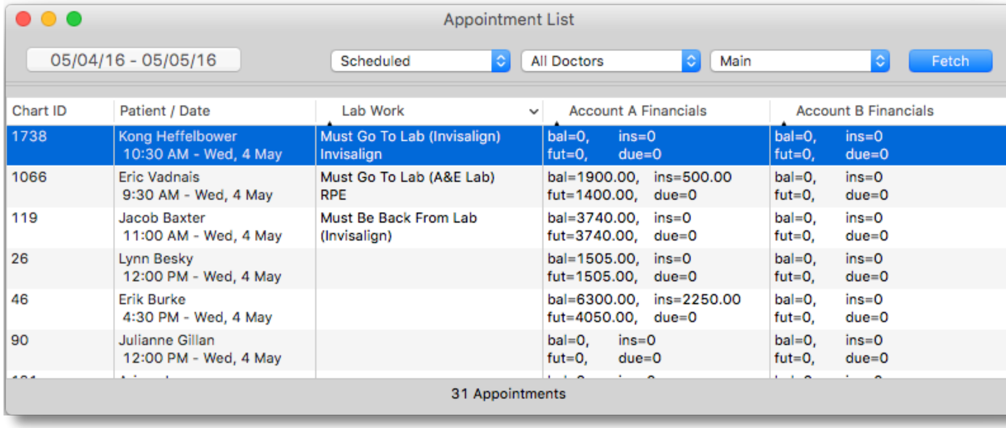


Figure 8-5: *Appointments Scheduled for Lab Work*

Creating an Appointment List for Past Due Balances

1. Click Matrix from the menu bar.
2. Click Appointments.
3. Select tomorrow's date.
4. Sort by Account A Financials to find past due balances.

Creating a Report for Treatment Coordinators

1. Click Reports from the menu bar.
2. Click Appointments of Type This Month.

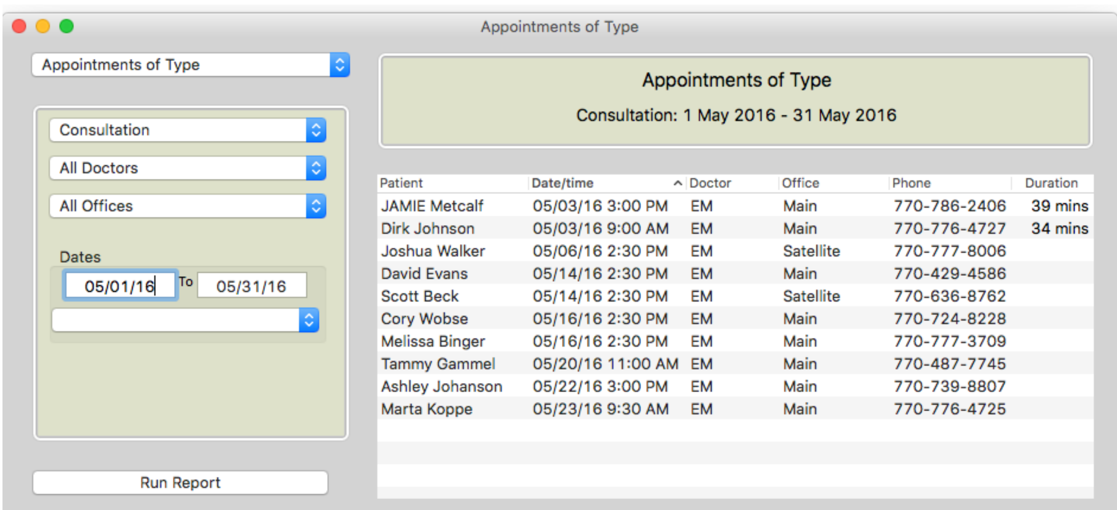


Figure 8-6: *Appointments of Type*

3. Click the drop down arrow beside adjustment and click Consultations.
4. Change the date for tomorrow.
5. Click Run Report.

8E Backing up topsOrtho

Backing up is the most important function your office performs with your topsOrtho system. A clean and recent backup will save your practice data if there's a hardware failure.We can use an external backup to restore topsOrtho in about an hour.The backup method outlined here is not a "preferred" method; it's the required method and it's the only way we can restore your practice data if there is a hardware failure.

Do not clone, install Carbonite or use any other type of online/offsite backup software.

Backups are automatic, hourly, and encrypted. They are also Time Machine compatible. The hourly backups are super fast because they back up what changed during the previous hour.

Superbackup will be set up for you by your Transition Specialist or our Support Team.

Here's what you'll need:
- The topsServer on OS X 10.8.x or higher
- Admin login & password
- Password to use for encrypting the drives (we'll help you with this & notate the password in our records)
- Two empty external hard drives

Here's how to backup:
1. After initial set up drive A will be connected to the topsServer all day.
2. At the end of the day eject drive A (right click on the drive icon and choose eject drive or drag the drive icon to the trash). Drive A will leave the office with you at the end of the day.
3. Plug drive B into the topsServer and leave it there all night through the following evening. At the end of the day you'll eject drive B and plug in drive A and take drive B home with you. That's it! It's easy.
   Remember keep one drive attached to the topsServer overnight and one drive will leave the office at the end of the day.

Additional information about backups:
Backups will occur automatically each hour at quarter of the hour, i.e., 1:45, 2:45, you can see backup status in the menu bar, and you'll get notifications when Time Machine backups are complete.

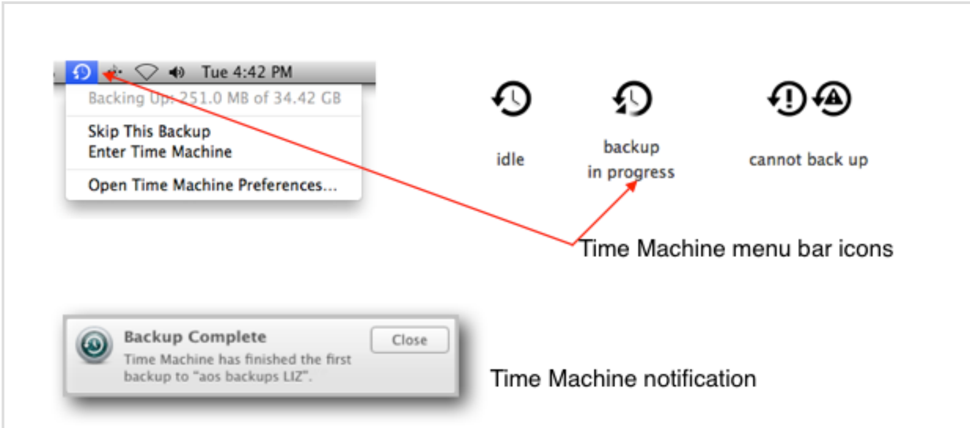


Figure 8-7: *Time Machine Notifications*

Remember performing backups is the MOST important thing you can do to protect your practice information.

Don't keep anything extraneous on your server machine. Don't run other software programs. Please remove photos and files, and trash old backups if they are on your desktop.

Summary

In this lesson, you should feel confident with:
- Managing patient flow in your practice
- Verifying that treatment notes were entered
- Creating appointment lists
- Backing up topsOrtho

Lesson 9 Financial Basics

Lesson Nine Overview

This lesson focuses on all aspects of financial management with topsOrtho. Individual financial management consists of entering contracts without insurance, managing auto-pay plans, and printing ledger receipts. Collective financial management consists of managing the financial day sheet, charges and payments, deposit slips and past due balances.

Objectives:

To become familiar with the financial training, you will:

9A **Enter Charges - Individual Management**
Some patients do not require a contract as they prefer to pay in full. This is accomplished by entering transactions only.

9B **Apply Contract Discounts - Individual Management**
There will be times when your office offers discounts to patients for various reasons. You will learn how to incorporate these discounts into your contract.

9C **Create Auto-Pay Plans - Individual Management -**
Some patients want to pay by an auto-payment plan using a debit or credit card or a bank draft. topsOrtho is integrated with OrthoBanc for managing this.

9D **Print the Ledger/Receipts - Individual Management**
Some patients would like a copy of their ledger or a specific receipt. It's easy to get these in topsOrtho.

9E **Generate Statements - Individual Management**
Printing and sending statements is an important part of your practice.

9F **Review Charges - Collective Management**
How to manage what has been charged to patients.

9G **Review Payments - Collective Management**
How to manage what has been collected or paid to the office.

9H **Review Past Due Balances - Collective Management**
How to manage the Accounts Receivable Report plus statements.

9A Entering Charges - Individual Management

This lesson delves further into patient transactions: charges and payments, starting contracts, and adjustments (positive or negative). Regardless of the type of transaction you perform, the process is the same. All transactions are posted to the patient's ledger and tracked through reports. To use transactions properly, be sure to specify what kind of payment you accept when a patient or account holder pays a bill. This will make deposits easy to verify.

Posting Payments and Charges

1. Click Action from the menu bar.
2. Click New Transaction.

Keyboard Shortcut
Command + T

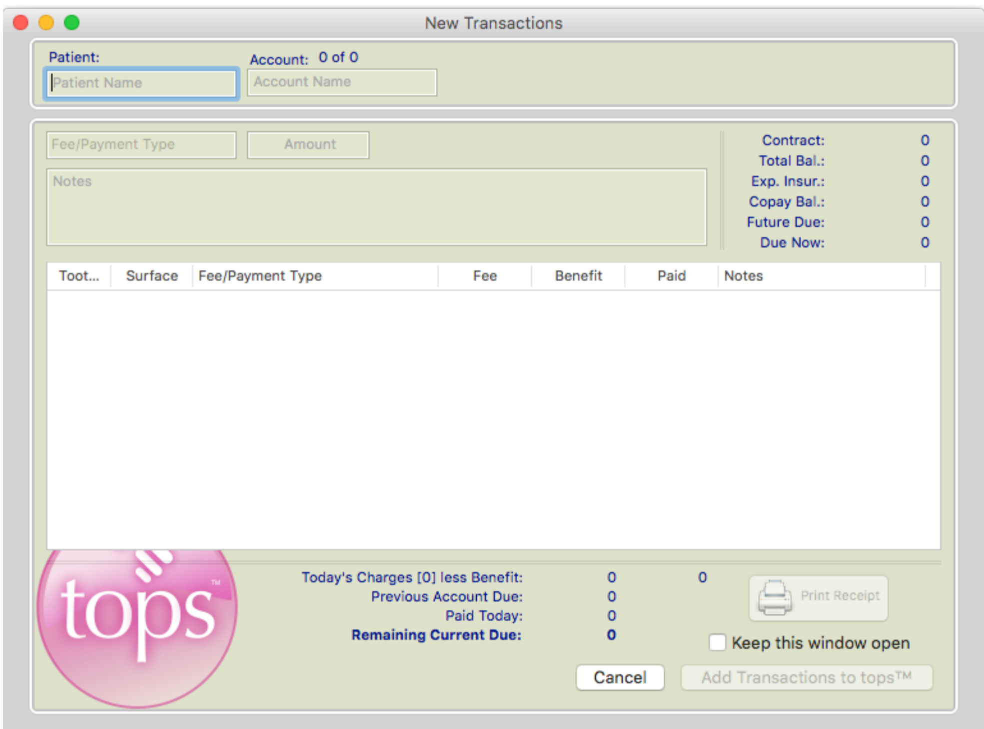


Figure 9-1: *New Transaction window*

3. Type in the patient's name and press Tab.
4. If necessary, select the account holder from the Account selection list, press Tab.
5. Choose the Fee/Payment Type, press Tab.

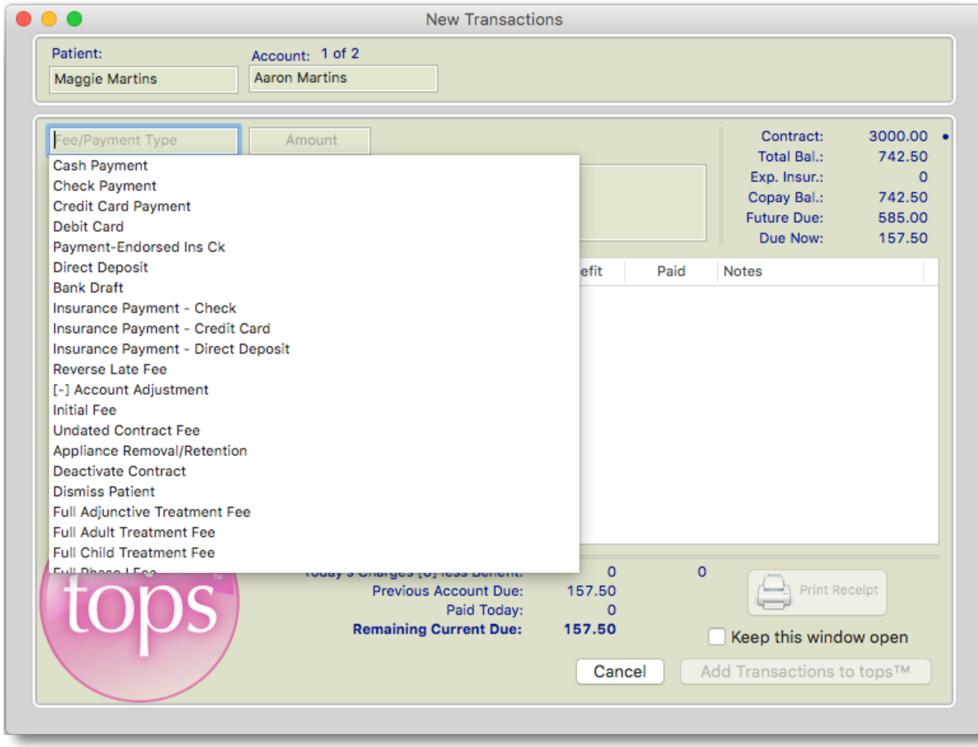


Figure 9-2: *Fee/Payment Type*

6. Enter the Amount without commas or hyphens. Choosing the payment type will take care of positive and negative numbers. Depending upon the Fee/Payment type, you will see another area for additional information such as check number or credit card type.
7. Enter notes. Always give a description of fees and payments. Press Tab to add the transaction into the listing area.

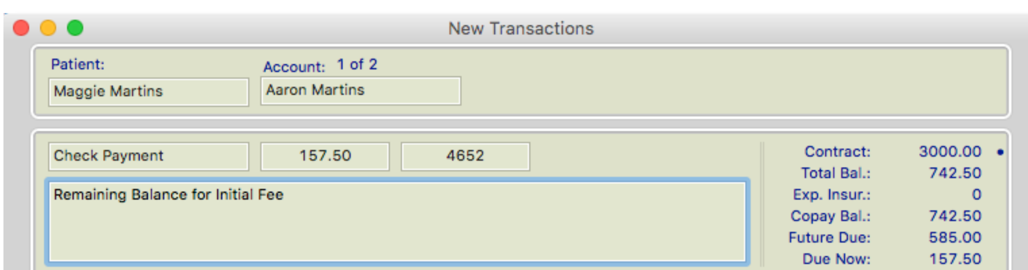


Figure 9-3: *Completed Transaction type and notes*

8. Repeat step 5 through 7 if you want to add more that one transaction to the patient's ledger.

If you have mistakenly added a transaction to the list, before clicking Add Transactions to tops, click the transaction in the list and choose Clear from the Edit menu, or use the shortcut Command + Delete.

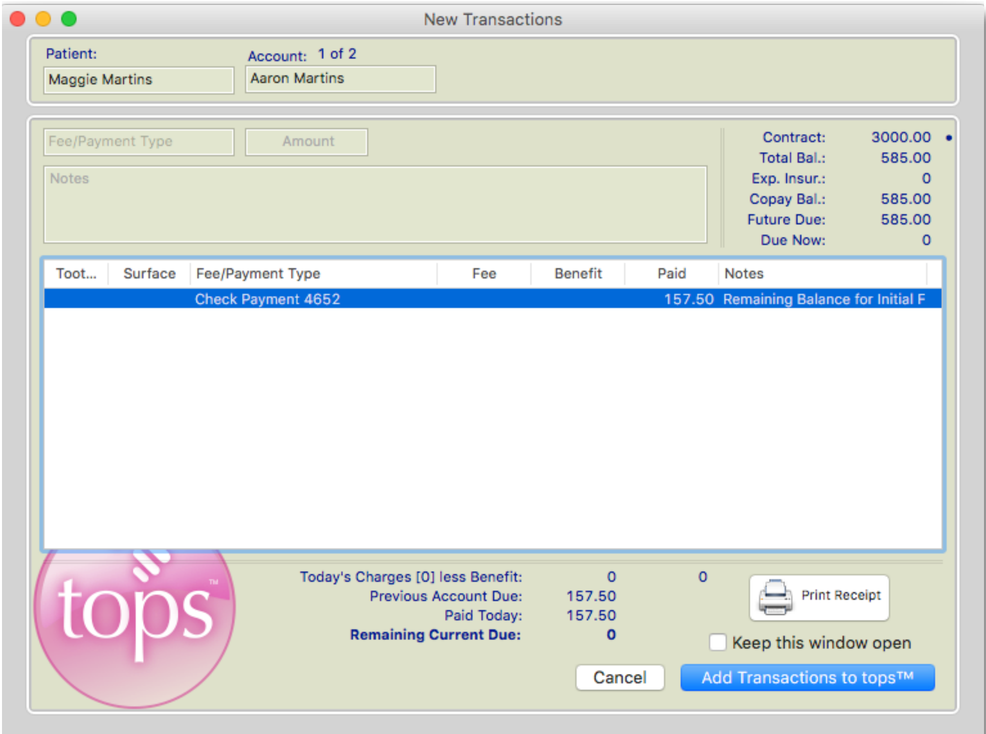


Figure 9-4: *Completed Transaction window*

9. Verify first, then click Add Transactions to tops™.

   You can also print a receipt directly from the New Transactions window. *Be careful! The transaction will be automatically added to topsOrtho at the same time the receipt prints. If you choose to print this way, first verify that the transaction is correct.*

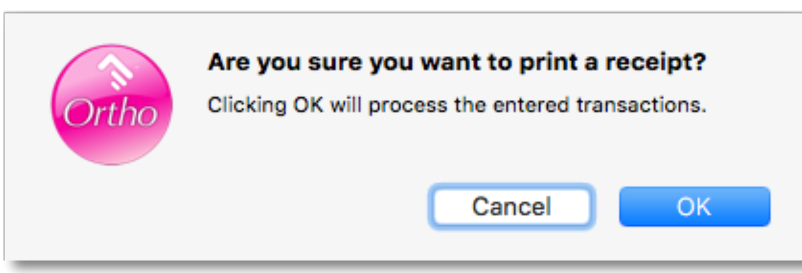


Figure 9-5: *Printing receipts in the New Transaction window*

   Printing receipts can also be printed from the Patient Information window.

Keeping the Transaction Window Open

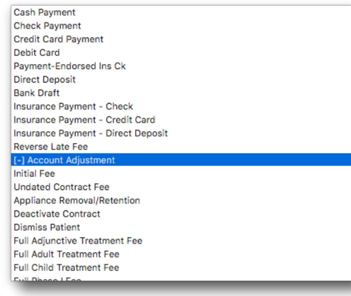
If you have several transaction and would like the transaction window to remain open, place a check in the box beside "Keep this window open" until you are finished entering all of your transactions. To close the window, remove the check.

Entering a (-) Account Adjustment to the Patient's Ledger

You need special password privileges to add negative account adjustments to a patient's ledger. When you add this type of transaction, you'll also be required to enter the type of transaction and provide notes for the ledger.

Entering a (-) Account Adjustment

1. Click Action from the menu bar.
2. New Transaction.
3. Press Tab to advance to the transaction type.
4. Click [-] Account Adjustment. You will be asked for your password.



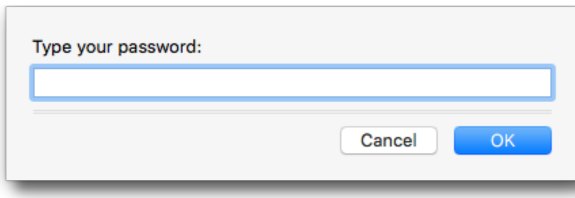


Figure 9-6: *New Transaction password*

5. Enter your password. Click OK.
6. Choose the Negative Adjustment Type.

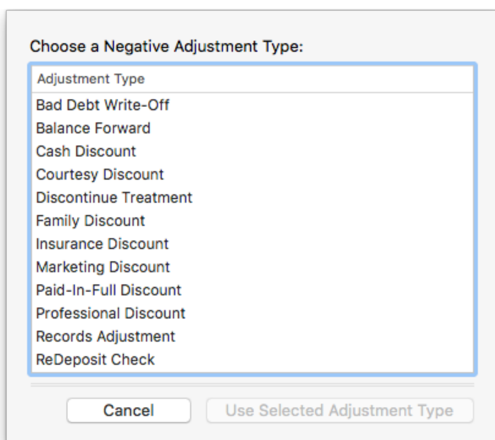
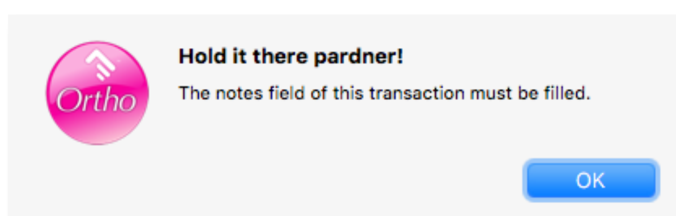


Figure 9-7: *Negative Adjustment Type*

7. Click Use Selected Adjustment Type.
8. Enter the Amount and press Tab.
9. Notes MUST be entered. If you do not type a note, you will see this warning:



10. Enter your notes.
11. Click Add Transactions.

Entering a (+) Account Adjustment to the Patient's Ledger

Entering a positive account adjustment to a patient's ledger is handled the same way as a negative adjustment. You must select the type of adjustment from a list, and add notes. If you do not enter notes, you will not be able to add the transaction to topsOrtho.

Entering Insurance Transactions

Entering an insurance transaction is slightly different from entering a regular transaction. There are two types of insurance transactions. The first type is a "true" insurance transaction, in which payment is applied to the Expected Insurance balance. The second is a third-party check, in which the insurance company sent a check, but you do not accept assignment of benefit. topsOrtho handles third-party checks as if they are from a patient; these checks are applied directly to the patient's balance.

Entering a Directly Paid Claim (Accepting Assignment)

1. Click Action from the menu bar.
2. Click New Transaction.
3. Click Insurance Payment from the transaction list. Press Tab.

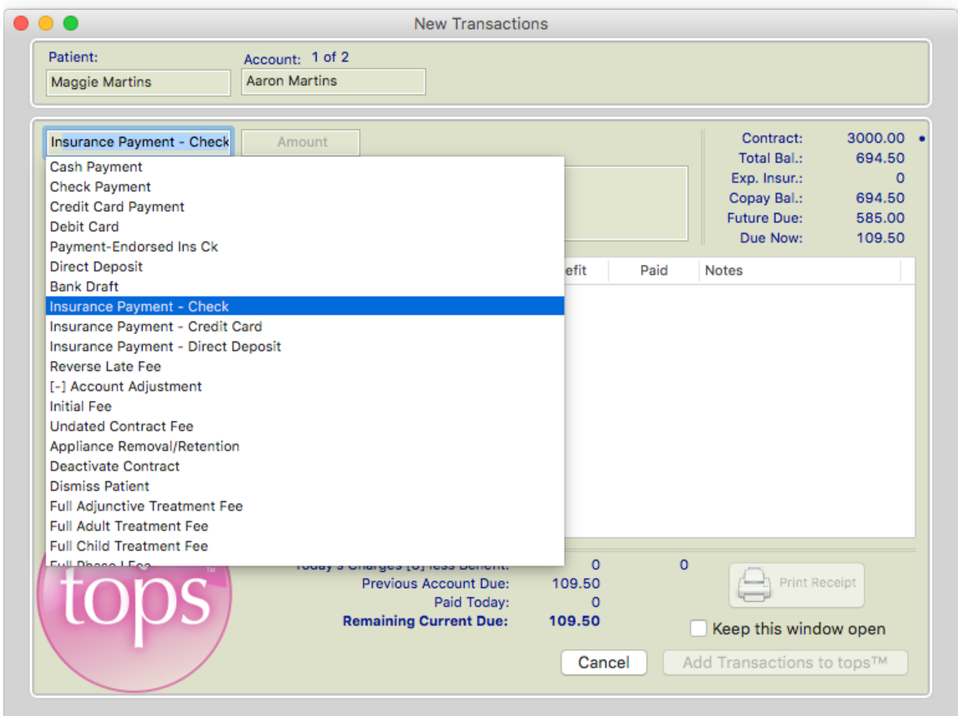


Figure 9-8: *Insurance Payment transaction*

4. Select the claim the check is to be applied against.

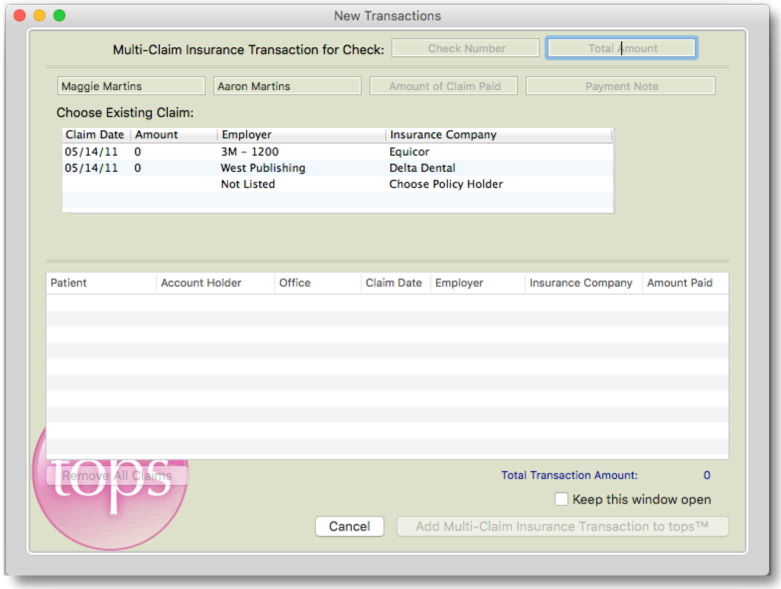


Figure 9-9: *Outstanding Insurance Claims*

5. Enter the amount and press Tab.
6. Enter the check number and press Tab.
7. Enter notes and press Tab to place the transaction in the transaction window.
8. Click Add Transactions to tops. Once you add the transaction to topsOrtho, the claim selected will indicate Paid.

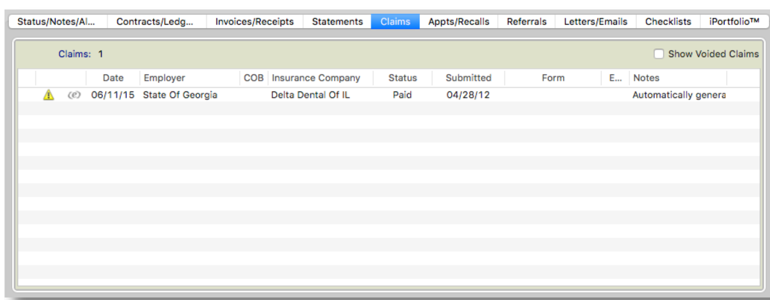


Figure 9-10: *Paid Insurance Claim*

Entering an Endorsed Check (Not Accepting Assignment)

1. Click Action from the menu bar.
2. Click New Transaction.
3. Click Payment-Endorsed Ins Check and press Tab.
4. Enter the amount of the check and press Tab.
5. Enter the check number and press Tab.
6. Enter the notes and press Tab.
7. Click Add Transactions to tops.

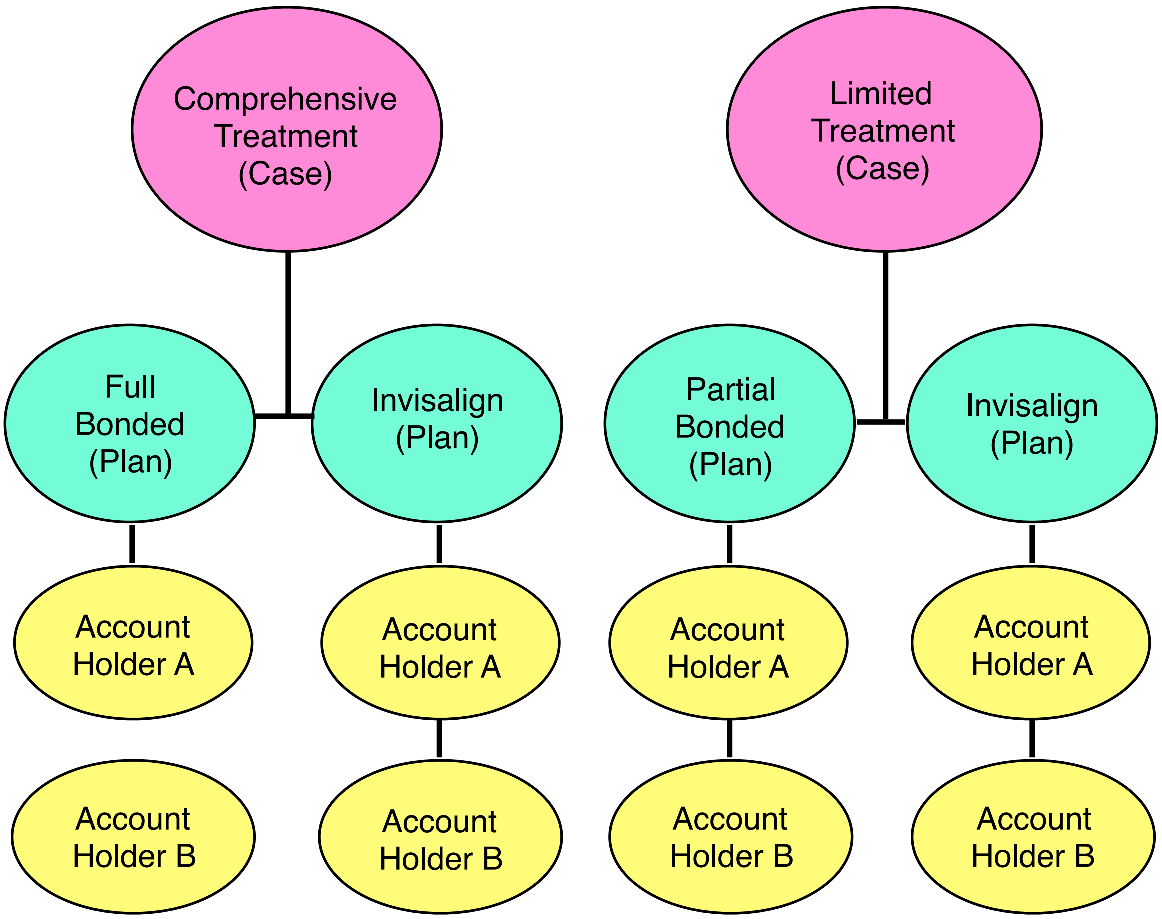
Since there are not claims associated with this check it will be applied to the patient's balance.

9B Contract Basics

In order for you to create a contract for a patient you must:

- Have at least one case created in the Patient Information - Clinical
- Have at least one treatment plan associated with the case
- No other active contracts.

topsOrtho allows two account holders per patient; therefore you can have up to two active contracts, one for each account holder. Account holder A's contract may be a total of $2,500 while Account holder B's contract may be $2,000, for a patient total of $4,500.



topsOrtho will store a contract in the Patient Information window indefinitely and will not charge the patient until the contract is activated by charging the initial fee. After starting a contract, the patient will be automatically charged according to the criteria you enter in the Contract Worksheet.

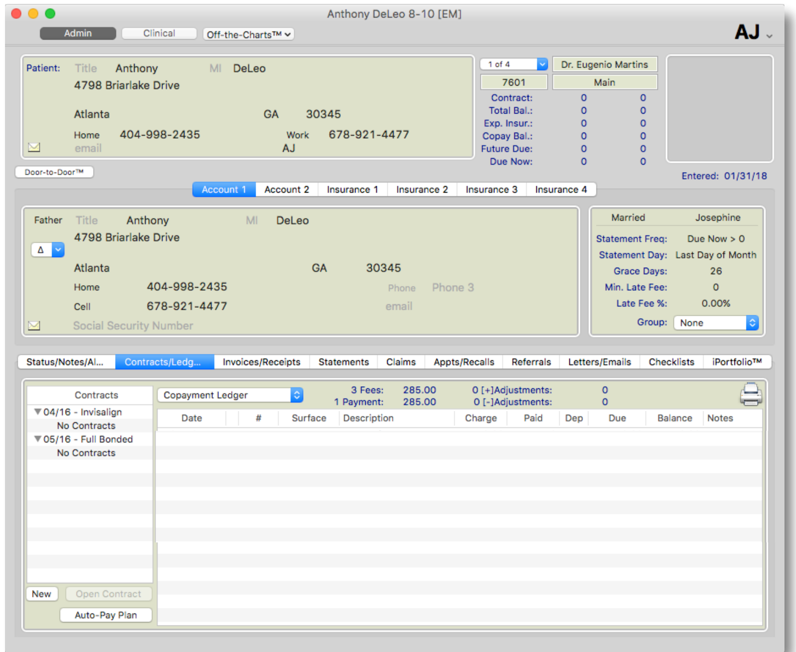


Figure 9-11: *Contracts*

The figure shows two treatment plans (Full Bonded and Invisalign) but no contracts have been created for either one.

We will make two contracts, one for each treatment plan. When the patient comes in for consultation, we can offer each treatment option.

Contract Basics

If you have created more than one treatment plan for a patient, be sure to select the contract that associates with the appropriate treatment plan.

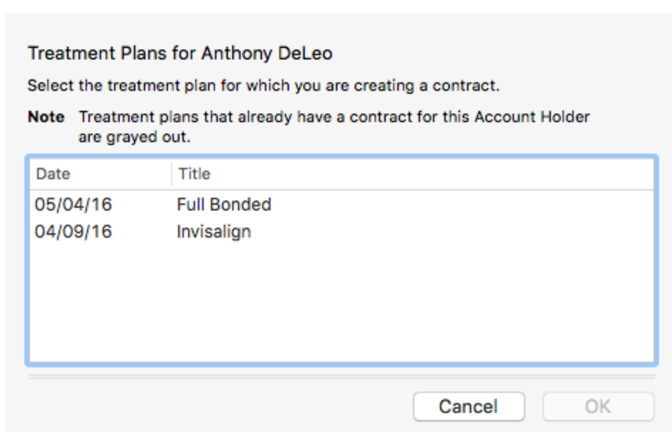


Figure 9-12: *Treatment Plan selection*

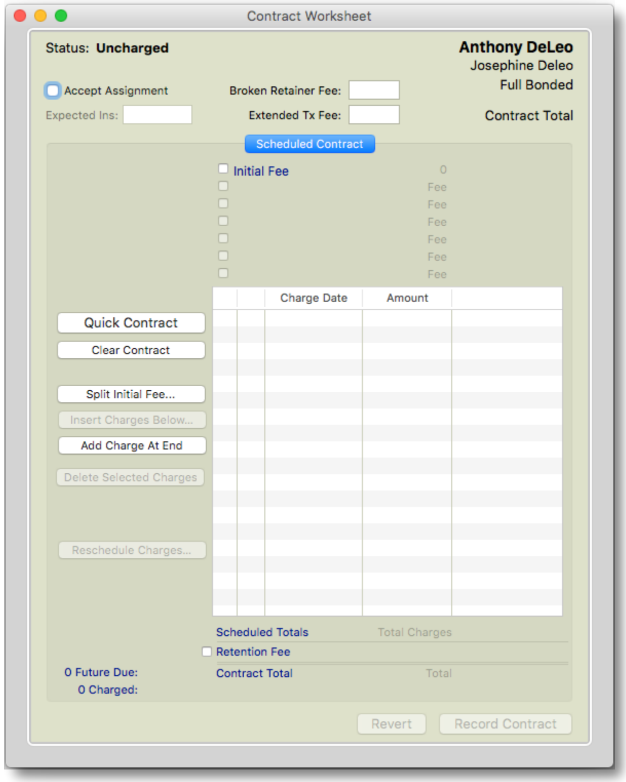
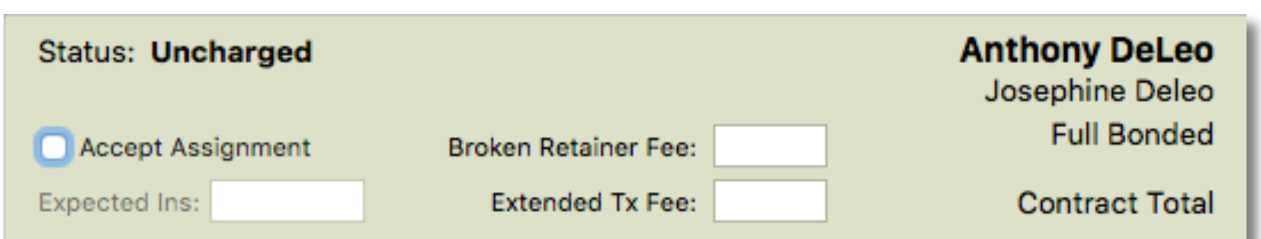


Figure 9-13: *Contract Worksheet*

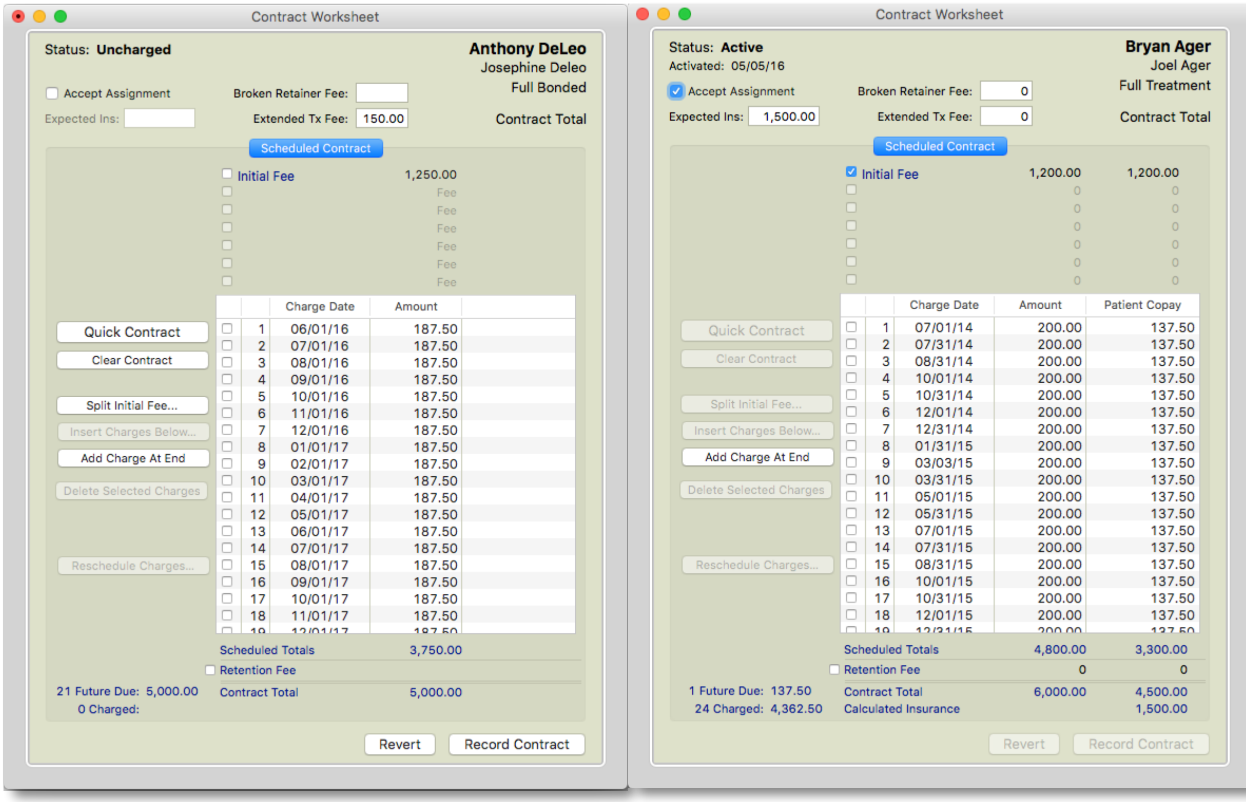
Contract Worksheet Sections

Status–Indicates whether the contract is uncharged, active or deactivated. Click the Accept Assignment checkbox if you are accepting insurance from the patient. If you are accepting assignment of insurance benefits, the Expected Insurance amount should be filled in with the expected benefit total.

Broken Retainer and Extended Tx Fees–Will be displayed according to information specified in Practice Setup.

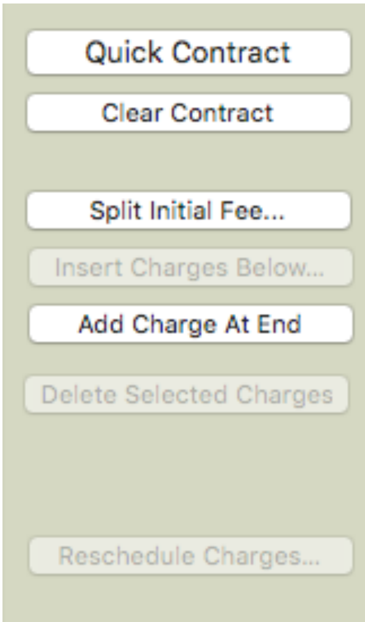


The patient's name, account holder and treatment plan are also visible at upper right.



In the above example, at left is an Uncharged contract with no assignment. At right is a filled in, Active contract that has accepted assignment.

Unscheduled Fee Blocks start with the Initial Fee. These areas let you enter fees that are 'extra' to normal contract payments, such as the Initial Fee, Records, and anything that is not a scheduled payment. These are included in the total contract amount, however, and must be charged manually. The checkbox next to each fee item indicates whether or not it has been charged in the ledger.



Quick Contract–Lets you create a contract using the "Contract Calculator."

Clear Contract–Click this if you need to start over before activating.

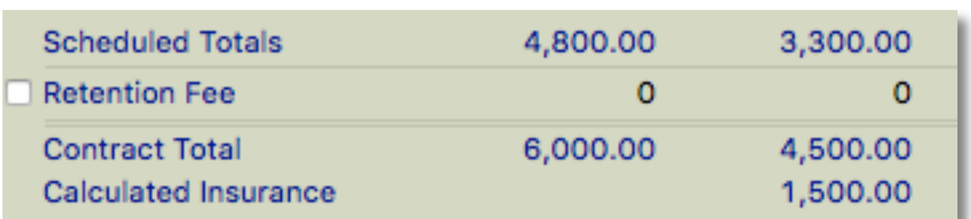
Split Initial Fee–Use if a patient needs to split the initial fee into multiple payments.

Insert Charges Below–Allows you to add charges to the Payment Schedule.

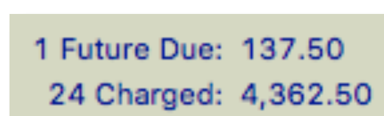
Add Charges At End–Adds charges to the end of the Payment Schedule.

Delete Selected Charges–Use to delete any uncharged fees in the Payment Schedule.

Reschedule Charges–Allows you to select charges already made to the patient's ledger and reassign them to a later date. This allows patients to get current on scheduled payments without adding new charges and negative adjustments.



Scheduled Totals–Total of scheduled payments. Includes all scheduled charges, but does not include unscheduled fees (e.g. the initial fee).
Retention Fee–Retainer fees, which must be charged manually.
Contract Total–Total of the contract, including any unscheduled contract fees.3750
Calculated Insurance–Calculated expected insurance amount.
Future Due - Number and Amount of charges that are due in the future.
Charged–Number and Amount of charges posted to the patient's Ledger.



Creating Contracts with No Insurance

1. Open the Patient Information window.
2. Click Contracts/Ledger/Auto-Pay tab.
3. Click New button.
4. Select the appropriate treatment plan.
5. Click Quick Contract.

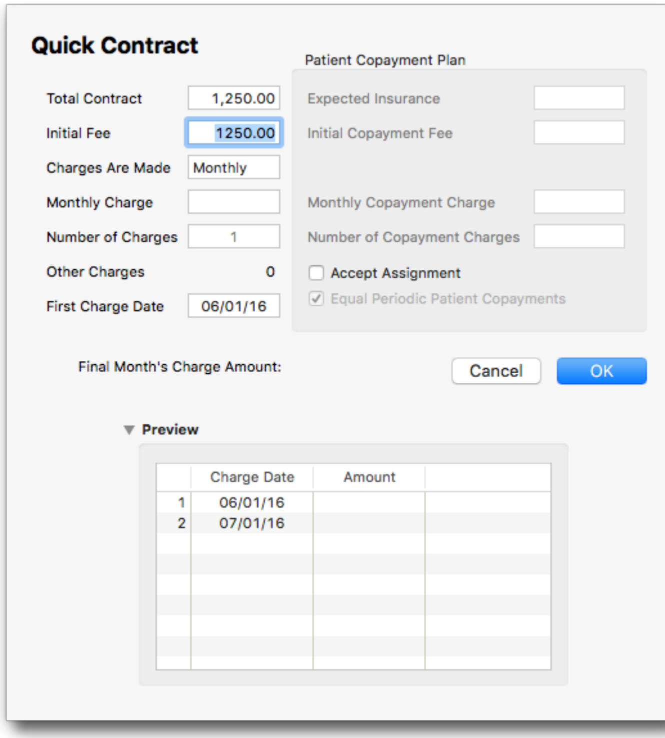
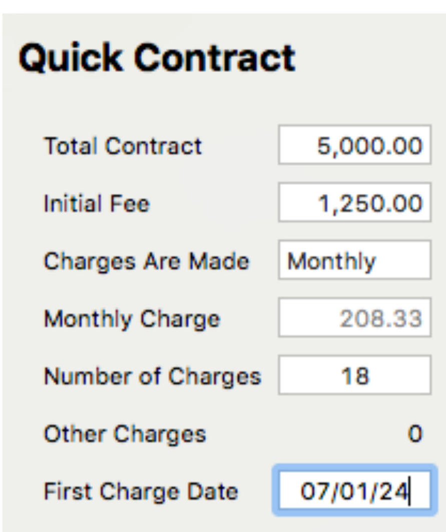


Figure 9-14: *Quick Contract Worksheet*

Total Contract–The total amount charged for treatment.

Initial Fee–Includes the amount charged to initiate treatment. (Add to this field any discounts forwhich the patient is eligible–courtesy, sibling, etc.–so that you can create a negative account adjustment to the patient's ledger.)
Charges Are Made–Frequency of charges.



Monthly Charge–How much you plan to charge the patient per month. You can enter an amount and topsOrtho will calculate the number of charges.

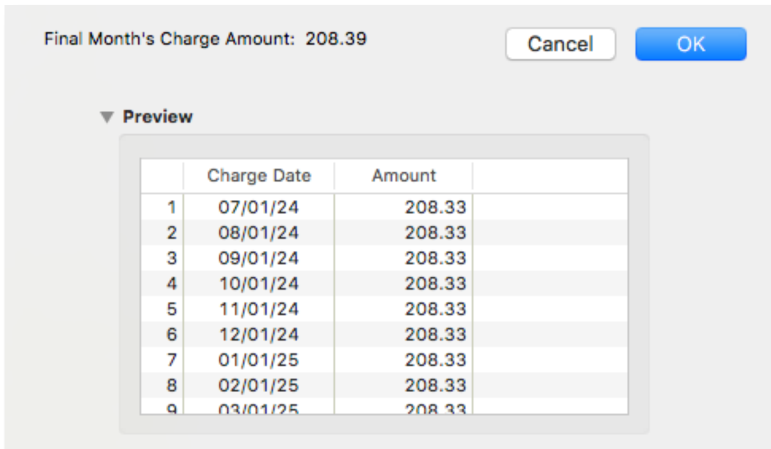
Number of Charges–How many months you plan to charge the patient for the contract. You can enter the number and topsOrtho will calculate the monthly payment.
Other Charges–Not used at this time.

First Charge Date–topsOrtho calculates this date based on the date that the quick contract is created. If the next month is more than three weeks away, the first payment will be scheduled for that month. If the next month is less than three weeks away, topsOrtho will schedule the first payment for the following month.

Examples:

A. Contract created June 12, 2019 (less than 3 weeks until July 1)
First charge date: **August 1**

B. Contract created June 5, 2024 (more than 3 weeks until July 1)
First charge date: **July 1**



Final Month's Charge–May be slightly different due to rounding up or down.

Preview–Shows the number of charge dates and the monthly charge.

6. Click OK.
7. Verify all numbers are accurate.
8. Click Record Contract.
9. Type your password.
10. Close the contract worksheet.

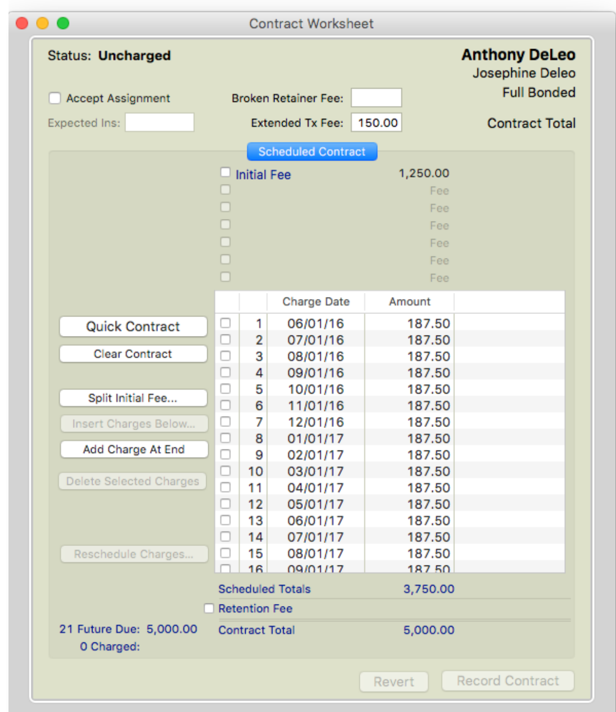


Figure 9-15: *Contract Worksheet, no Insurance*

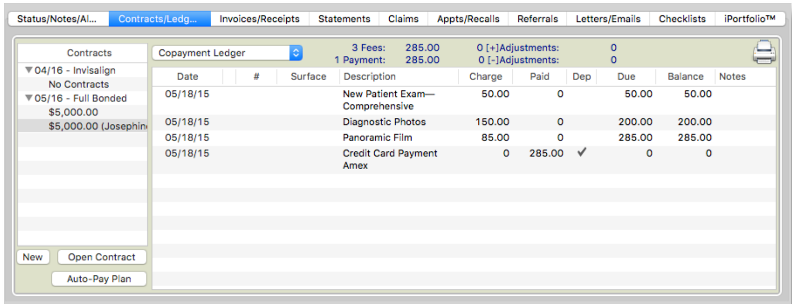


Figure 9-16: *Recorded Contract*

The contract has been recorded, but not activated. Y**ou must charge the initial fee to activate a contract.**

Activating/Starting a Contract

1. Click Action from the menu bar.
2. Click New Transaction...

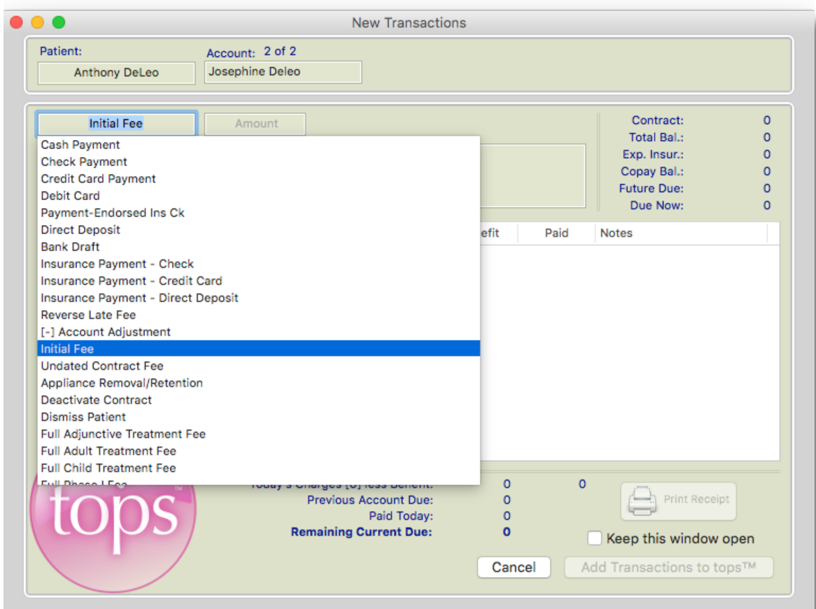


Figure 9-17: *Charging Initial Fee*

3. In the Fee/Payment Type, click Initial Fee. You must select the active treatment plan.

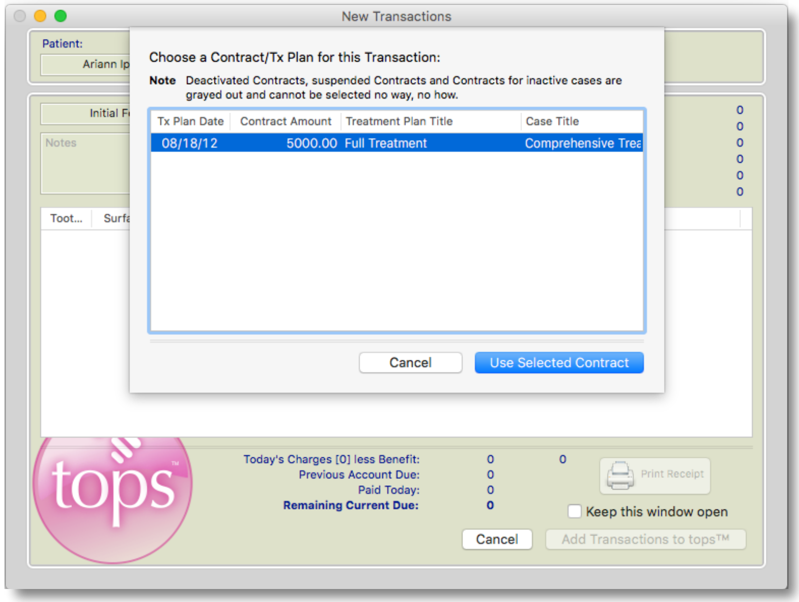


Figure 9-18: *Choose Contract*

4. Click the Contract/Active Treatment Plan.
5. Click Use Selected Contract. The Initial Fee will be filled in.
6. Enter the payment type and type notes. Click Add Transaction to tops.

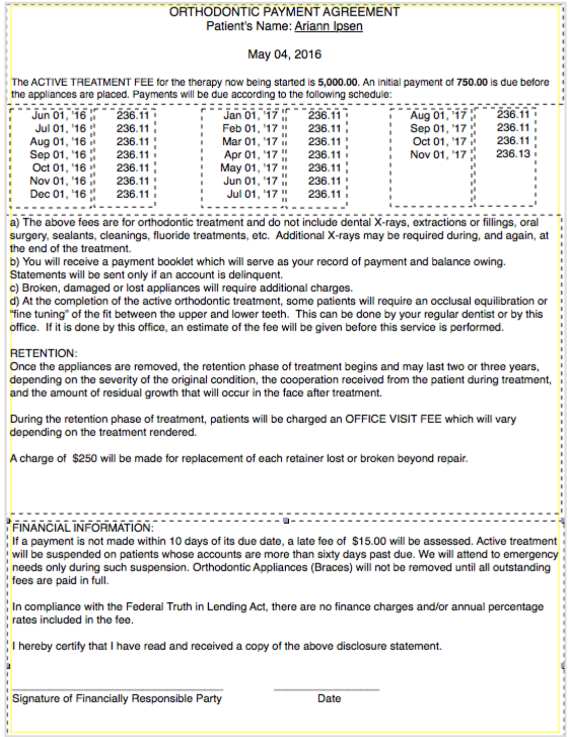
The single bullet to the right of the amount indicates an active contract with no insurance.

Printing a Contract

Once a patient has decided on treatment, you will print a contract for signature. A contract is considered a letter by topsOrtho. And a letter can be modified until until midnight of the day it is printed. A letter will stay in “Draft” mode indefinitely, but the letter will lock once it is emailed, marked as sent or approved, or as stated above, at midnight of the day the letter is printed.

Keyboard Shortcut
Command + L

1. Click Action from the menu bar.
2. Click New Letter/Form.
3. Select the letter Contract No Insurance, and press Tab.
4. Fill in the requested information, pressing Tab each time to advance to the next field.
5. Click Add Letter/Form to tops.
6. Adjust text boxes as necessary.


ORTHODONTIC PAYMENT AGREEMENT
Patient's Name: Ariann Ipsen

May 04, 2016

The ACTIVE TREATMENT FEE for the therapy now being started is **5,000.00**. An initial payment of **750.00** is due before the appliances are placed. Payments will be due according to the following schedule:

Jun 01, '16	236.11	Jan 01, '17	236.11	Aug 01, '17	236.11
Jul 01, '16	236.11	Feb 01, '17	236.11	Sep 01, '17	236.11
Aug 01, '16	236.11	Mar 01, '17	236.11	Oct 01, '17	236.11
Sep 01, '16	236.11	Apr 01, '17	236.11	Nov 01, '17	236.13
Oct 01, '16	236.11	May 01, '17	236.11		
Nov 01, '16	236.11	Jun 01, '17	236.11		
Dec 01, '16	236.11	Jul 01, '17	236.11		

a) The above fees are for orthodontic treatment and do not include dental X-rays, extractions or fillings, oral surgery, sealants, cleanings, fluoride treatments, etc. Additional X-rays may be required during, and again, at the end of the treatment.
b) You will receive a payment booklet which will serve as your record of payment and balance owing. Statements will be sent only if an account is delinquent.
c) Broken, damaged or lost appliances will require additional charges.
d) At the completion of the active orthodontic treatment, some patients will require an occlusal equilibration or "fine tuning" of the fit between the upper and lower teeth. This can be done by your regular dentist or by this office. If it is done by this office, an estimate of the fee will be given before this service is performed.

RETENTION:
Once the appliances are removed, the retention phase of treatment begins and may last two or three years, depending on the severity of the original condition, the cooperation received from the patient during treatment, and the amount of residual growth that will occur in the face after treatment.

During the retention phase of treatment, patients will be charged an OFFICE VISIT FEE which will vary depending on the treatment rendered.

A charge of $250 will be made for replacement of each retainer lost or broken beyond repair.

FINANCIAL INFORMATION:
If a payment is not made within 10 days of its due date, a late fee of $15.00 will be assessed. Active treatment will be suspended on patients whose accounts are more than sixty days past due. We will attend to emergency needs only during such suspension. Orthodontic Appliances (Braces) will not be removed until all outstanding fees are paid in full.

In compliance with the Federal Truth in Lending Act, there are no finance charges and/or annual percentage rates included in the fee.

I hereby certify that I have read and received a copy of the above disclosure statement.

Signature of Financially Responsible Party   Date

Figure 9-19: *Contract with no Insurance*

7. Click command + p to print the contract. Once a contract has been signed, don't forget to scan the document, then drag and drop it into iPortfolio.

Contract with Two Account Holders

There may be times that you need to create a contract with two account holders. topsOrtho allows you to have up to two account holders for one patient. To create this type of contract, you need to discuss with each account holder the amount of the contract for which they will be responsible.

1. Enter both account holders for your patient.

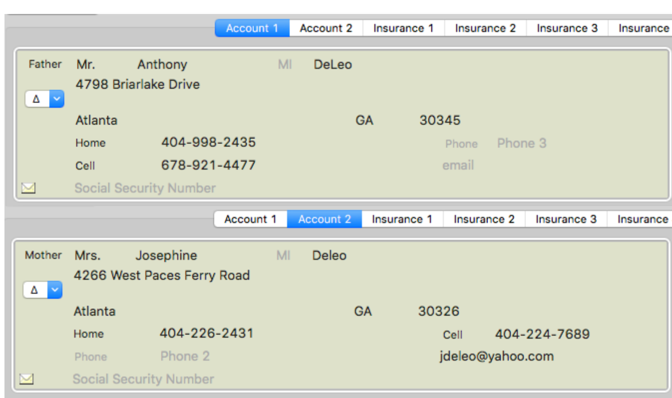


Figure 9-20: *Two Account Holders*

Let's say the patient's total contract is $5,000. Account Holder 1 will be responsible for $3,500 and Account Holder 2 will be responsible for $1500. They will split the Initial Fee of $1,000.

2. Click Account 1 tab.
3. Create a contract for Account 1 using the Quick Contract worksheet.
4. Enter the portion of the contract for which Account Holder 1 is responsible.
5. Enter the initial fee and the charges to be billed to Account Holder 1.

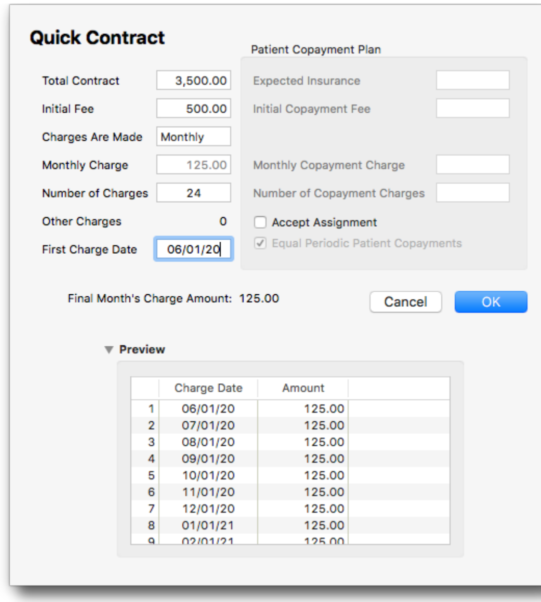


Figure 9-21: *Account 1 Contract*

6. Record the contract. Close the window.
7. Click the tab for Account Holder 2.
8. Create a contract for Account Holder 2 by using the Quick Contract worksheet.
9. Enter the portion of the contract for which Account Holder 2 is responsible.
10. Enter the initial fee and the charges to be billed to Account Holder 2.

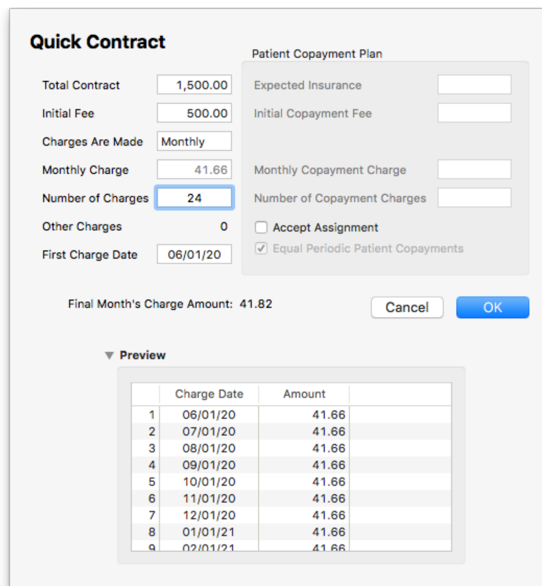


Figure 9-22: *Account 2 Contract*

11. Record the Contract. Close the window.
12. Charge the Initial Fee for EACH account holder separately to activate each contract.

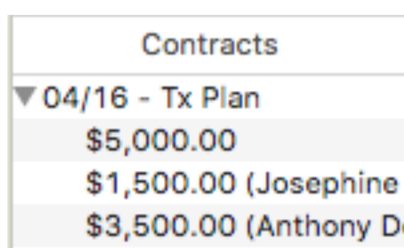


Figure 9-23: *Recorded Contracts*

Viewing Individual Ledgers
1. Click on the Account Number tab of the ledger you would like to view.
2. Verify that Copayment Ledger is selected in the Contracts/Ledger/Auto-Pay tab.

Creating an Paid-in-Full Transaction
1. Click Action from the menu bar.
2. Click New Transaction.
3. In Fee/Payment Type, select the type of treatment and press Tab.
4. Enter the amount for treatment and press Tab.
5. Enter any notes and press Tab.
6. After verifying, click Add Transaction to tops.

Contract Discounts
There are times when you give a patient a discount (courtesy discount, multi-sibling discount, etc.). When starting a new contract, it's easy to apply this discount to the initial fee. You can simply create a negative account adjustment, enter the amount of the discount, and then charge the patient for the remainder of the initial fee.

Creating a Contract with a Discount (No Insurance)
1. Open the Patient Information window.
2. Create a contract in the normal way using Quick Contract.
3. Enter the contract amount, the normal initial fee, and the number of months that the contract will be charged.
4. Verify all amounts and click Record Contract.

Initiating the Contract
1. Click Action from the menu bar.
2. Click New Transaction.
3. Click Initial fee, press Tab.
4. Select the correct treatment plan, click OK. The initial fee amount will be filled in.
5. Enter in any notes desired, press Tab.
6. Create a (-) Account Adjustment for the amount of the discount given.
7. Collect the balance of the initial fee from the patient in the normal way. You should have a zero balance in Due Now.

9C Creating Auto-Pay Plans - Individual Management

There are two ways to use the Auto-Payment plan in topsOrtho. The first is automatically, through an OrthoBanc subscription. The second way is manually. topsOrtho will post the payment to the patient's ledger, but you must run the credit/debit card on the proper date and then check off the payment in the Deposit Slip.

Either way, if you decide to use the Auto-Payment plan, you must set up security encryption to protect your patients' credit/debit card information. topsOrtho has two levels of security, System Encryption and the Workstation Access Key.

1. Click topsOrtho from the menu bar.
2. Click Practice Setup….
3. Click the Staff/Security tab.
4. Enter you password.
5. Click the System Encryption Security tab.

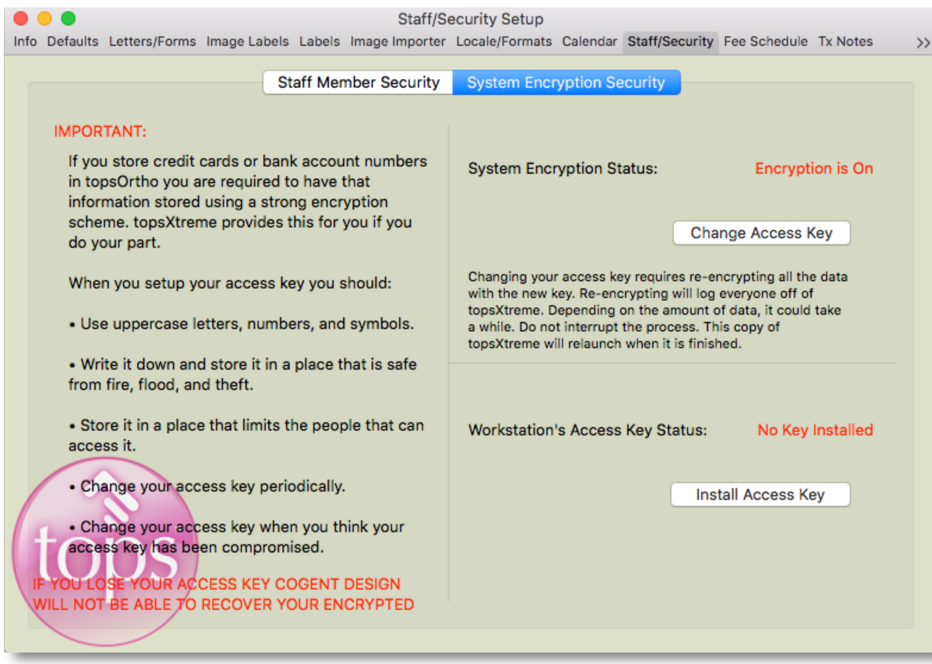


Figure 9-24: *System Encryption Security*

As indicated in the above figure, when setting up encryption:
• Use uppercase letters, numbers, and symbols.
• Write it down and store it in a place that is safe from fire, flood, and theft.
• Store it in a place that limits the people that can access it.
• Change your access key periodically.
• Change your access key when you think it's been compromised.

If you lose your access key, tops cannot recover your encrypted data.

Adding System Encryption Security

1. Click Change Access Key.
2. Enter a 16 character unique character/number/case sensitive encryption code.
3. Click OK. Store the code in a safe place.

Adding a Workstation Access Key

In order to run the credit/debit card each month, you need to add a Workstation Access Key. This can be used only on the computer on which you install the key. It must be the same as the System Encryption Access Key.

1. Click Install Access Key

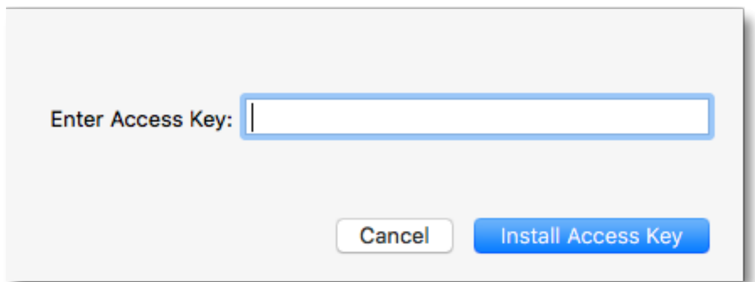


Figure 9-25: *Workstation Access Key*

2. Enter a 16 character unique character/number/case sensitive access key.
3. Click Install Access Key.

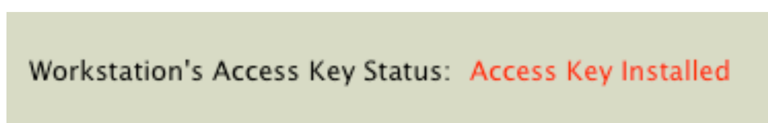


Figure 9-26: *Access Key Installed*

Once security is set up (both system encryption and workstation access), you're ready to store the account holder's information.

Auto-Payment Plan Basics
topsOrtho makes it easy for patients who want to use an auto-payment plan. Once security has been set up, you are ready to enter the patient's customized plan. An auto-payment plan allows you to run the account's holder's credit/debit card on pre-defined days. This offers the account holder the convenience of not writing a check or coming into the office for payments.

Auto-Payment Plan Sections
The Auto-Payment Plan Worksheet looks very similar to the contract worksheet. One major difference is the top portion of the screen, where you will enter the account holder's secure information.

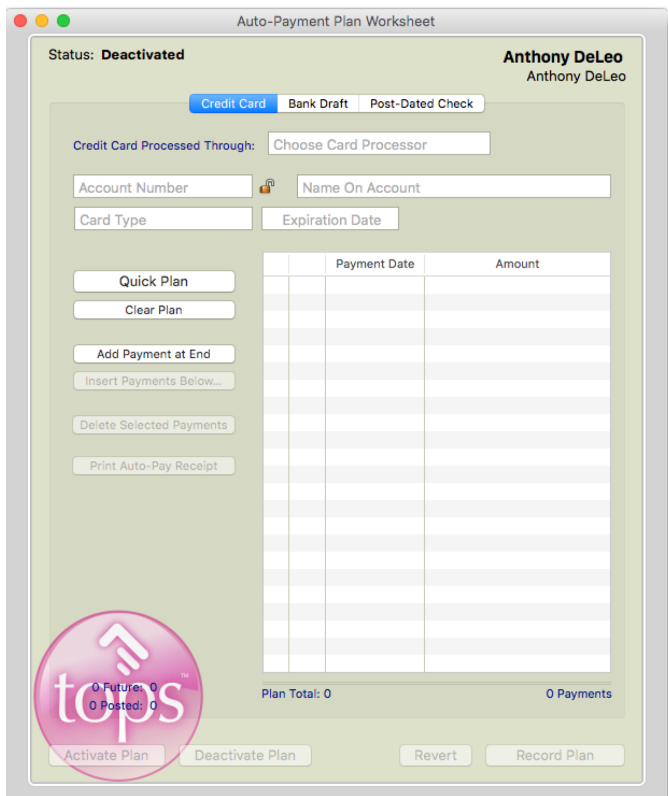
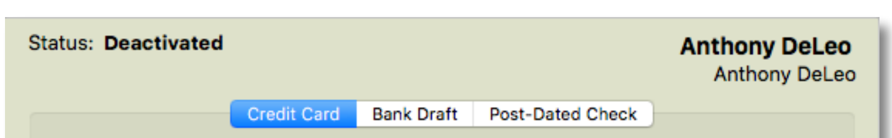


Figure 9-27: *Auto-Payment Plan Worksheet*

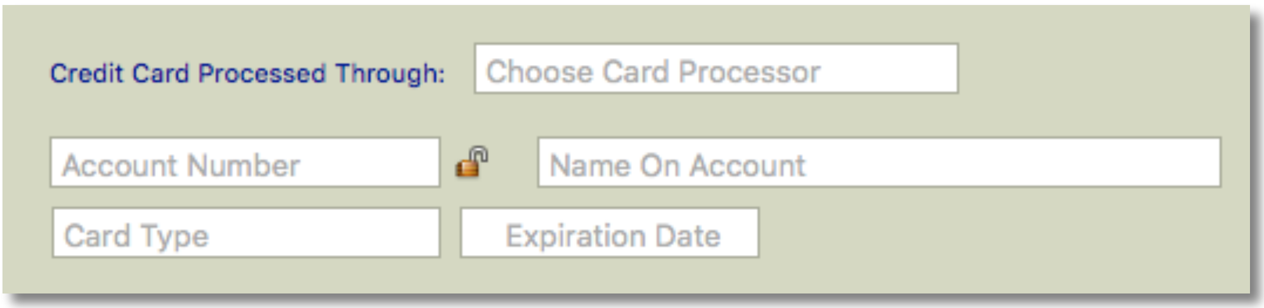


Status–Shows the status of the auto-payment plan.

Name–The patient's name and the account holder's name underneath.

Credit Card / Bank Draft / Post-Dated Check–Click the appropriate type of auto-pay plan that you require. Post-Dated Checks are typically used in Europe but not in the United States.

Credit Card Processed Through–Select either Manual or OrthoBanc (if you subscribe). Remember, OrthoBanc will process the card, post the payment on the ledger, and mark the transaction on the deposit slip as deposited. If a card is denied, they will make the appropriate telephone calls.

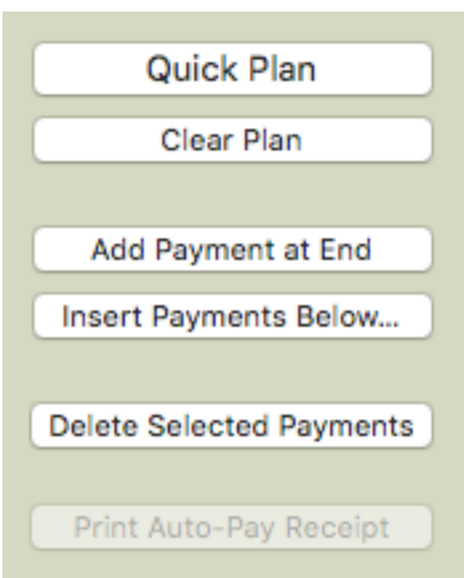


Account Number–Enter the card number and then click on the lock to encrypt. In order for you to manually run the credit card number, you must have the proper level of security for viewing that number. topsOrtho will ask for passwords.

Name On Account–Enter the name exactly as it appears on the credit card.

Card Type–Select the appropriate card from the drop-down list.

Expiration Date - enter the card's expiration date.



Quick Plan–Lets you create a plan using the "Plan Calculator."
Clear Plan–Allows you to clear the information if you need to start over before activating.
Add Payment at End–Allows you to add payments at the end of the Payment Schedule.
Insert Payments Below...–Add payments below the selected payment on the Payment Schedule.
Delete Selected Payments–Delete any payment in the Payment Schedule, unless it is already processed.
Print Auto-Pay Receipt–Allows you to print a receipt showing all scheduled payments, with check marks beside the ones that have been paid.

Schedule–Indicates the payment date, amount, number of months, and if the payment has been charged.

Plan Total–Shows the total amount to be paid as well as the total number of payments.

Future–Shows the number of payments and their total.

Posted–Shows the number and amount of payments posted to the patient’s ledger.

Activate Plan–You must first record the plan and then activate it. This is similar to contracts, when you recorded the contract but then had to charge the initial fee in order to activate the contract. Here, you do not charge the plan, but simply click on Activate Plan.

Deactivate Plan–If the plan has already been paid out or the patient decides to start paying at the office, you can click to deactivate the plan.

Revert–Allows you to return to the original plan before any changes were made.

Record Plan–Record the plan on Patient Information.

Creating an Auto-Payment Plan

1. Open Patient Information.
2. Click Contract/Ledger/Auto-Pay tab.
3. Click Auto-Pay Plan.
4. Click Quick Plan. (sections defined below)
5. Enter the Total Plan and press Tab.
6. Select how the payments are to be made and press Tab.
7. Enter either the payment amount or the number of payments, then press Tab.
8. Enter the First Payment Date and press Tab. The preview screen should be filled out.
9. Verify, then click OK.

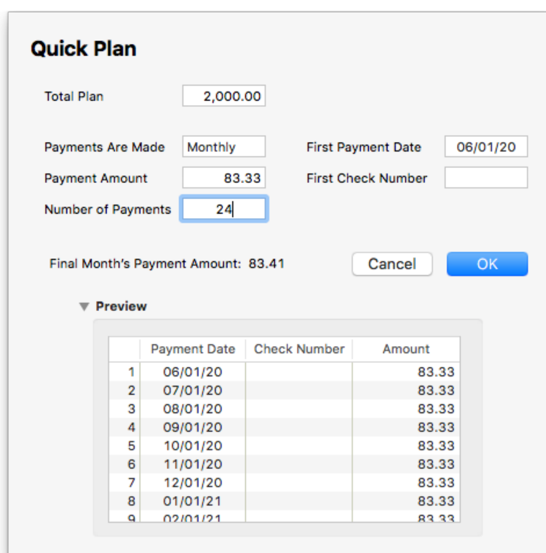


Figure 9-27: *Quick Plan*

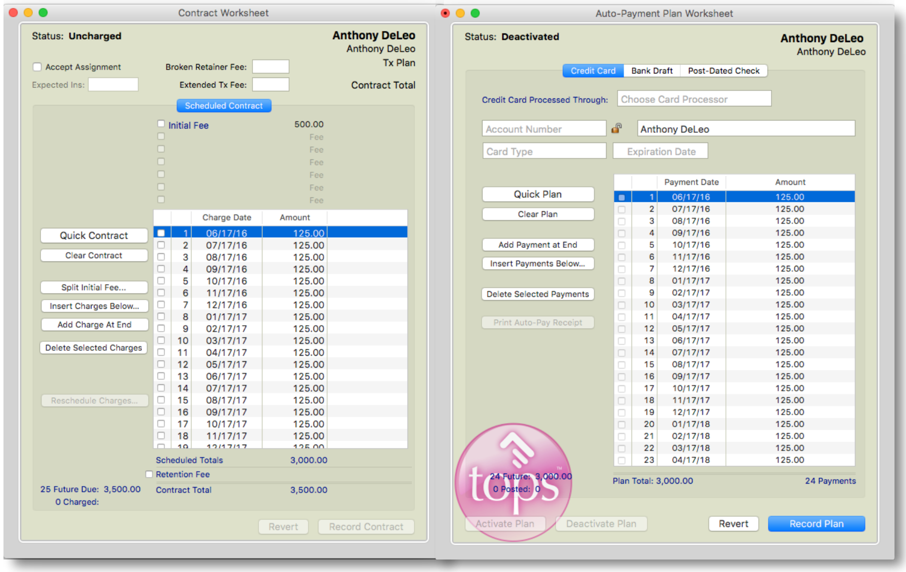


Figure 9-28: *Contract Worksheet and Auto-Payment Worksheet*

Total Plan–The total amount of the plan.

Payments Are Made–Frequency of payments.

Payment Amount–How much are the payments? You can enter an amount and topsOrtho will calculate the number of charges.

Number of Payments–How many months do you plan to collect from the patient? You can enter the number and topsOrtho will calculate the monthly payment.

First Payment Date—topsOrtho calculates this date based on the date that the quick contract is created. If the next month is more than three weeks away, the first payment will be scheduled for that month. If the next month is less than three weeks away, topsOrtho will schedule the first payment for the following month.

Examples:

A. Contract created June 12, 2011 (less than 3 weeks until July 1)
   First charge date: **August 1, 2011**
B. Contract created June 5, 2011 (more than 3 weeks until July 1)
   First charge date: **July 1, 2011**

Final Month's Payment–May be slightly different due to rounding up or down.

Preview–Shows the number of payment dates and the monthly payment.
Check the patient's contract to be sure the contract and the auto-payment plans are equal. The payment plan does not have to match the contract.

Enter Personal Credit Card Information

1. Select the Processed Through option and press Tab.
2. Enter the credit card number.
3. Click the Lock icon to encrypt the number, and press Tab.
4. Enter the name on the account, exactly as it appears on the credit card, and press Tab.
5. Select the Card Type from the list and press Tab.
6. Enter the card's expiration date.

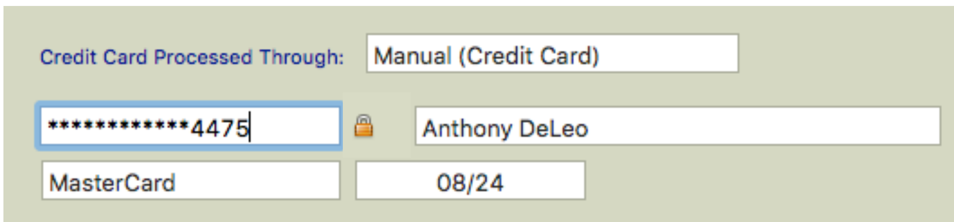


Figure 9-29: *Personal Information Filled In*

7. Click Record Plan.
8. Click Activate Plan.
9. Click OK.

Viewing Auto-Payment Plans for Processing

Run a list of all patients that need to have their payments processed. topsOrtho provides a list of all auto-payment plans, along with the total remaining balance, next date for processing, and the next payment amount. Once you open the list, you can open a patient's auto-payment plan by displaying the contextual menu and clicking on the appropriate option.

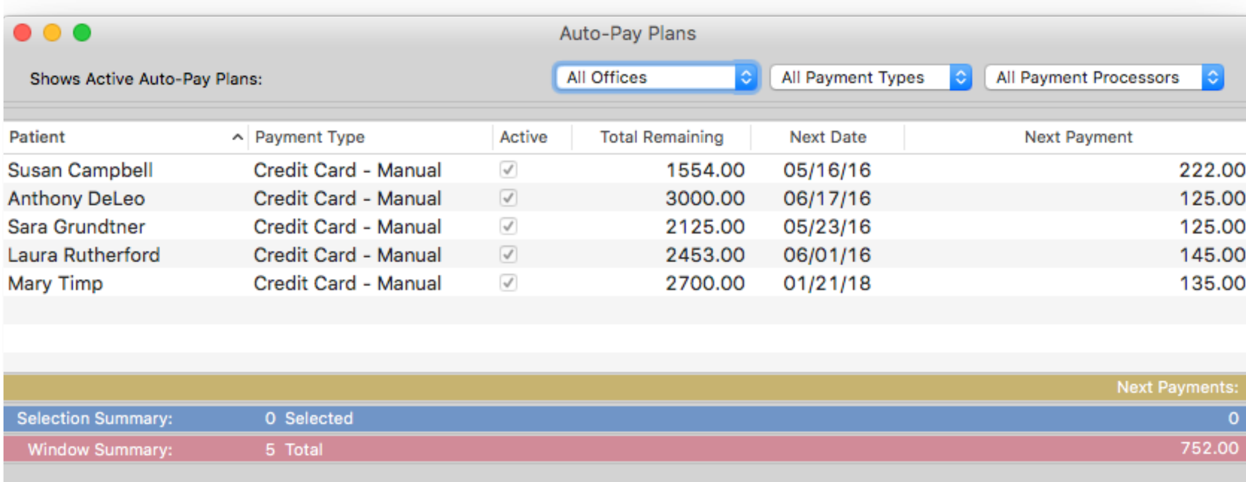


Figure 9-30: *Auto Pay Plans*

Viewing Auto-Payment Plans

1. Click Matrix from the menu bar.
2. Click Auto Pay Plans.
3. Click on a patient's name.
4. Right-click to display the contextual menu.
5. Click Open Auto-Pay Plan. This will open the patient's plan.

Processing an Auto-Pay Plan

1. Click the Lock icon to view the credit card number.
2. Enter your password, then click OK.
3. Process the payment. It automatically adds to the patient's ledger as a payment transaction.
4. Click Print Auto-Pay Receipt and send to patient.

Viewing Processed Auto Pay Plans

You should verify the list of auto-payments along with the Auto-Pay Detail report. This assures that you have processed the payments.

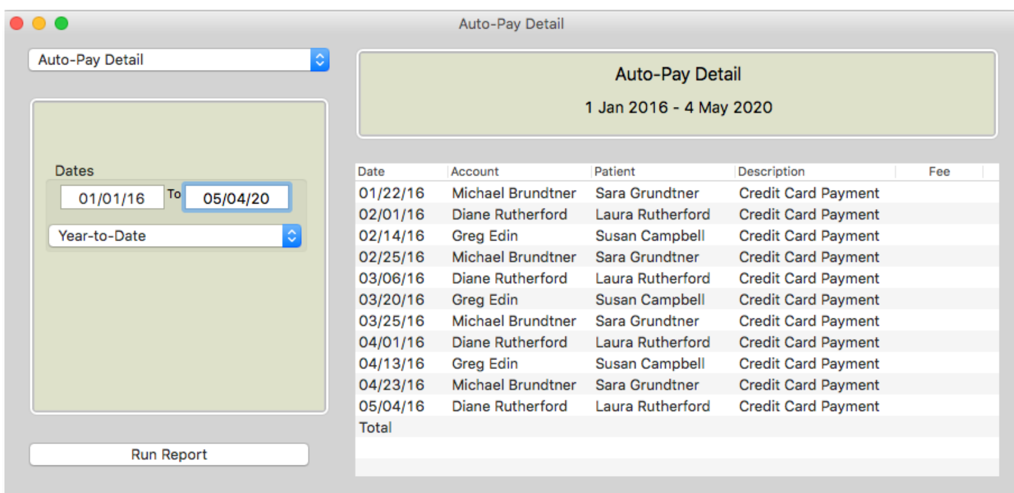


Figure 9-31: *Auto-Pay Transactions Report*

Viewing Auto-Pay Plan Detail

1. Click Reports from the menu bar.
2. Click Auto Pay Detail.
3. Enter your password, then click OK.
4. Verify the list of transactions to your Auto-Pay Plan list.

If you need to adjust an auto-payment plan, you must deactivate it first. In doing so, you will clear all the past information from the original plan. The new plan is created from this moment forward. The original information is stored in the patient's ledger or receipts if you need to refer back to it. This information will always be available.

9D Printing Ledger/Receipts - Individual Management

Printing a a patient's ledger or a receipt can be accomplished either from the Contracts/Ledger/Auto-Pay tab or if it is only a receipt, print from the Receipts tab on the Patient Information window.

Printing a patient's ledger

1. Click on the Contracts/Ledger/Auto-Pay tab.
2. Click the Printer icon on the right.

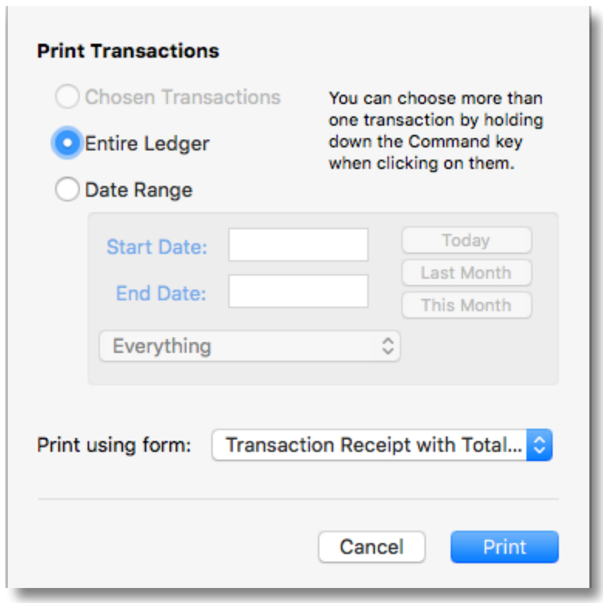


Figure 9-32: *Print Transactions*

3. Select the appropriate options.
4. Click Print.
5. Enter password if required.

9E Statements - Individual Management

Statements are generated automatically in topsOrtho during rollover. They are populated according to the information entered in the Patient Information window and the topsOrtho default window. You can view, print or email statements. Once the statement list has compiled, you can filter the list in various ways. A statement informs the account holder about any past due amounts, scheduled contract fees, and any remaining expected insurance.

How topsOrtho Generates Statements

The following example gives you a better understanding of how statements are generated in topsOrtho.

Charge Date = 1 (The first day of the month)
Grace Days = 13 (The 13th day of the month)
Statement Date = 15 (The 15th day of the month)
Last Day Statements to Cover = 15 (The 15th day of the month)

Add the Charge Date (1) plus Grace Days (13) plus 1 day for rollover = 15. So the 15th of the month is when late fees will be charged, at the very end of the day (midnight). The statements are ready to print the morning of the 16th, but will be dated the 15th, along with late charges applied.

1. Click Matrix from the menu bar.
2. Click Statements.

Checked–If clicked, a check will appear in the box of all statements for further processing.

Unchecked–Clicking this will remove the check in all of the boxes for further processing.

Gear icon–Gives options for the selected statements.

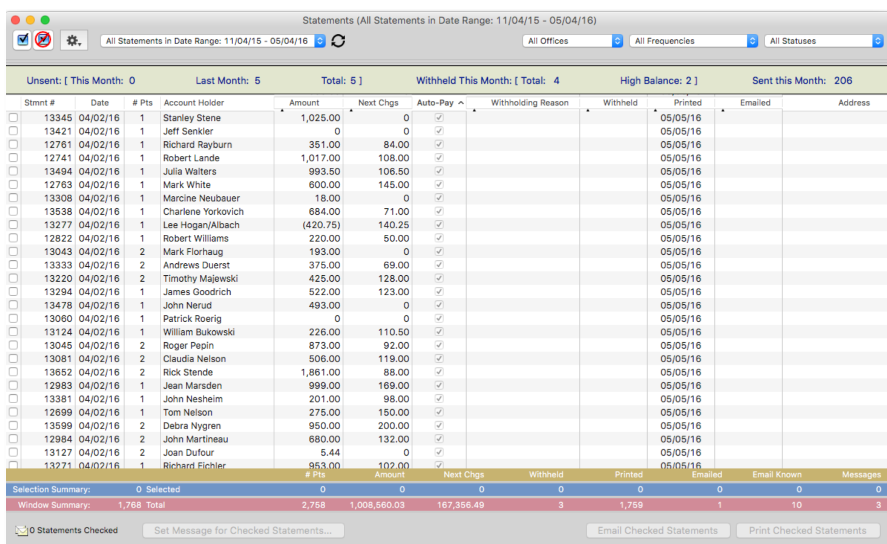
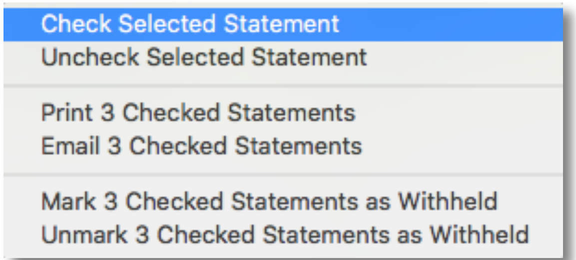
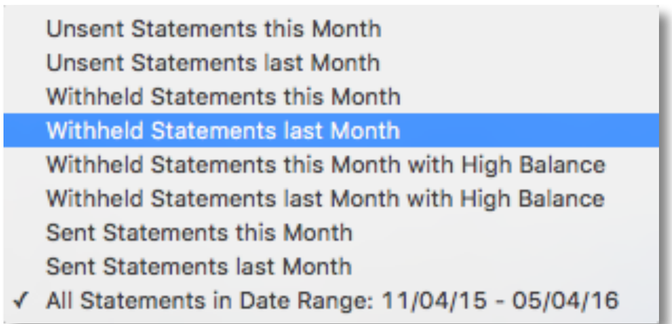


Figure 9-33: *Statement List*



To email a statement, you must have the account holder's email address in Patient Information and your mail server set up in Practice Setup...

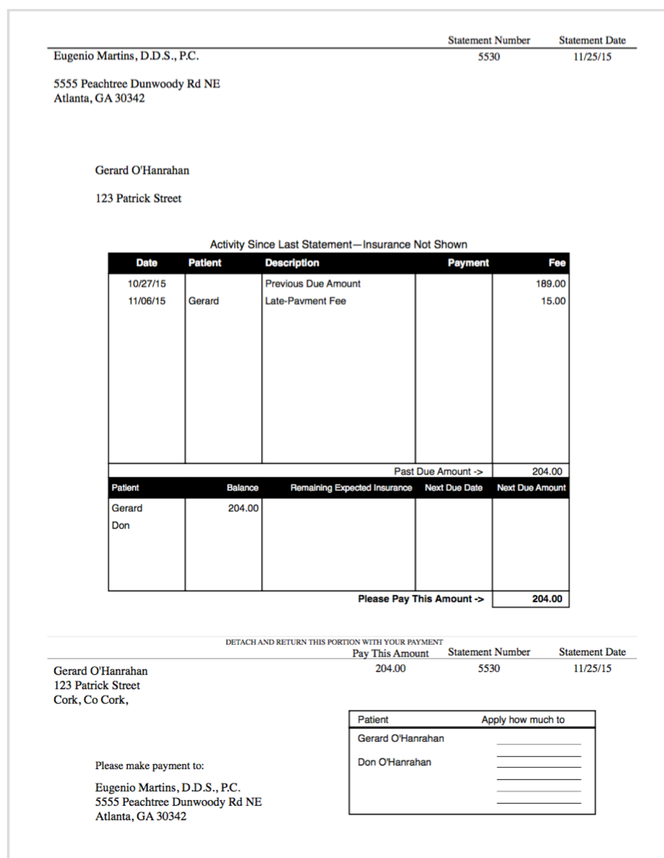


You can filter the statement list several ways, as illustrated by the figure to the left.

Add Note to Checked Statements–If you'd like to add a note to one or more statements, enter it in the box below and click Add Note to Checked Statements. The note will appear in the upper right of the statement and display on the Statements List in the Messages column.

Generate a List of Statements

1. Click Matrix from the menu bar.
2. Click Statements.
3. Select the statements.
4. Click the gear and select Print or Email selected statements. Enter your password. To email statements you must set up your mail server in Practice Setup. More information can be found in the Outgoing Mail Server Setup section.



Eugenio Martins, D.D.S., P.C.

Statement Number: 5530
Statement Date: 11/25/15

5555 Peachtree Dunwoody Rd NE
Atlanta, GA 30342

Gerard O'Hanrahan

123 Patrick Street

Activity Since Last Statement—Insurance Not Shown

Date	Patient	Description	Payment	Fee
10/27/15		Previous Due Amount		189.00
11/06/15	Gerard	Late-Payment Fee		15.00
			Past Due Amount ->	204.00

Patient	Balance	Remaining Expected Insurance	Next Due Date	Next Due Amount
Gerard	204.00			
Don				
			Please Pay This Amount ->	204.00

DETACH AND RETURN THIS PORTION WITH YOUR PAYMENT

Pay This Amount	Statement Number	Statement Date
204.00	5530	11/25/15

Gerard O'Hanrahan
123 Patrick Street
Cork, Co Cork,

Patient	Apply how much to
Gerard O'Hanrahan	
Don O'Hanrahan	

Please make payment to:

Eugenio Martins, D.D.S., P.C.
5555 Peachtree Dunwoody Rd NE
Atlanta, GA 30342

Figure 9-34: *Statement*

Viewing Printed or Emailed Statements

1. Click Matrix from the menu bar.
2. Click Statements.
3. Sort by Date Range.
4. Date will appear under the Printed or Emailed column.

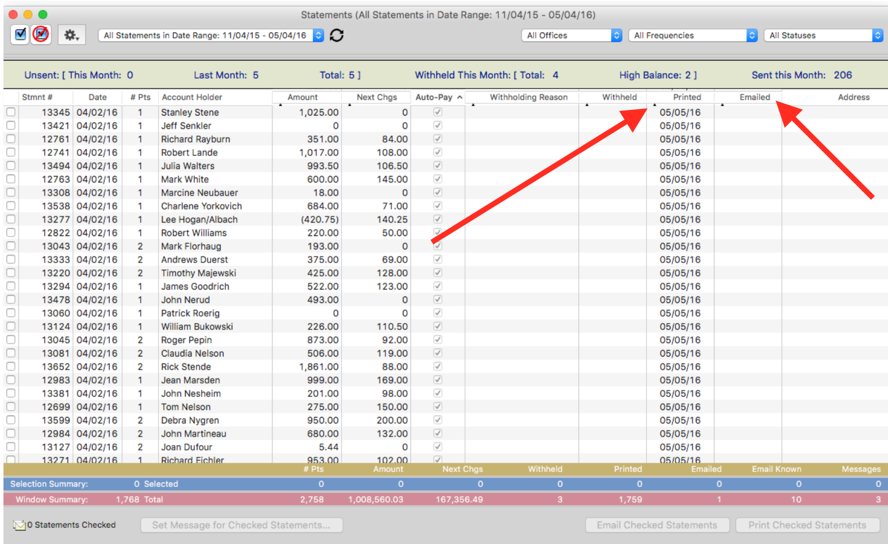


Figure 9-35: *List of Printed Statements*

Additional Statement Information

topsOrtho generates statements on a monthly basis. These statements are generated according to the information that was entered on the Patient Information window.

In the example to the left:

- A statement will be generated when the Contract or Due Now is greater than 0.
- Charge Date is the 1st of the month.
- The Statement Day is the 11th day of the month.
- Statements are generated during rollover on the 11th day of the month.
- You can print the statement on the 12th day of the month.
- A late fee of $5 will be added to the patient's ledger during rollover on the 8th day of the month, and will appear on the patient's ledger on the 9th day of the month.
- A late fee percentage has not been used.

By default the List opens to Unsent Statements this Month, if you send statements on the last day of the month select Unsent Statement Last Month to view your statements on the first of the month.

9F Charges - Collective Financial Management

Once individual financial management has taken place for the day, it's time to look at finances as a whole.

The Financial Day Sheet

The Financial Day Sheet provides a snapshot of all financial transactions recorded in your practice for a specific day. You can use this report in conjunction with the Deposit Slip to verify the amount of money collected and being deposited. The Financial Day Sheet requires a password to open.

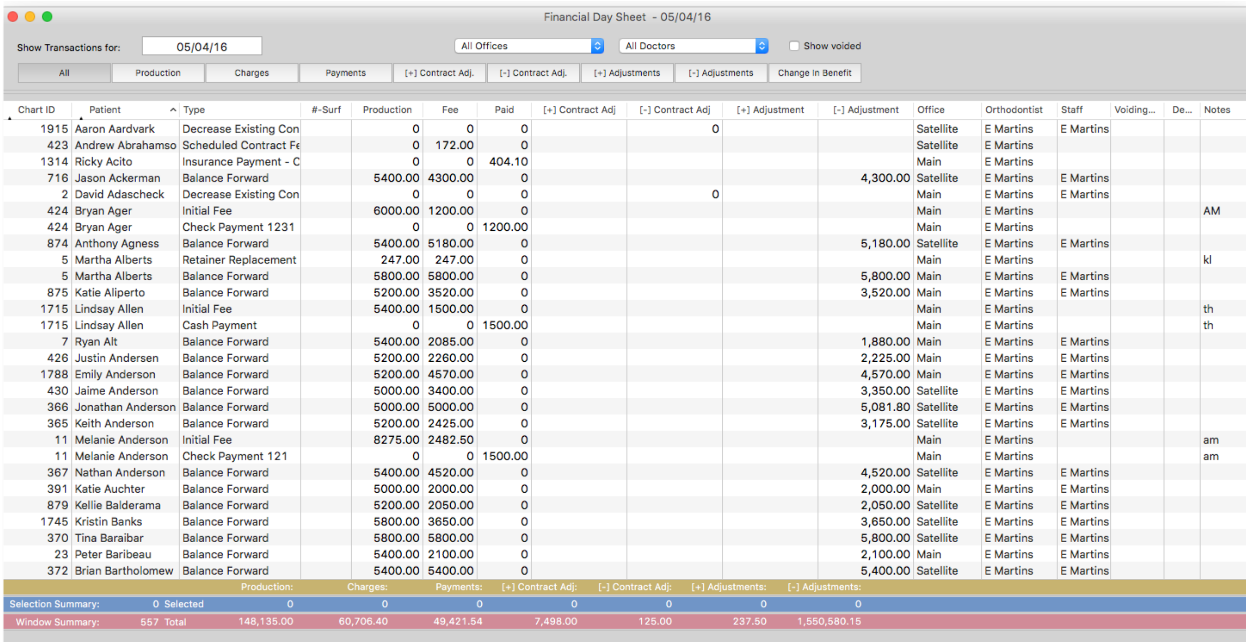
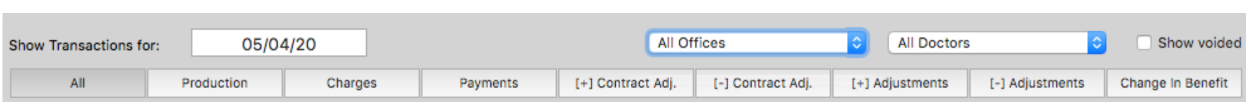


Chart ID	Patient	Type	#-Surf	Production	Fee	Paid	[+] Contract Adj	[-] Contract Adj	[+] Adjustment	[-] Adjustment	Office	Orthodontist	Staff	Voiding...	De...	Notes
1915	Aaron Aardvark	Decrease Existing Con		0	0	0		0			Satellite	E Martins	E Martins			
423	Andrew Abrahamso	Scheduled Contract Fe		0	172.00	0					Satellite	E Martins				
1314	Ricky Acito	Insurance Payment - C		0	0	404.10					Main	E Martins				
716	Jason Ackerman	Balance Forward		5400.00	4300.00	0				4,300.00	Satellite	E Martins	E Martins			
2	David Adascheck	Decrease Existing Con		0	0	0		0			Main	E Martins	E Martins			
424	Bryan Ager	Initial Fee		6000.00	1200.00	0					Main	E Martins				AM
424	Bryan Ager	Check Payment 1231		0	0	1200.00					Main	E Martins				
874	Anthony Agness	Balance Forward		5400.00	5180.00	0				5,180.00	Satellite	E Martins	E Martins			
5	Martha Alberts	Retainer Replacement		247.00	247.00	0					Main	E Martins				kl
5	Martha Alberts	Balance Forward		5800.00	5800.00	0				5,800.00	Main	E Martins	E Martins			
875	Katie Aliperto	Balance Forward		5200.00	3520.00	0				3,520.00	Main	E Martins	E Martins			
1715	Lindsay Allen	Initial Fee		5400.00	1500.00	0					Main	E Martins				th
1715	Lindsay Allen	Cash Payment		0	0	1500.00					Main	E Martins				th
7	Ryan Alt	Balance Forward		5400.00	2085.00	0				1,880.00	Main	E Martins	E Martins			
426	Justin Andersen	Balance Forward		5200.00	2260.00	0				2,225.00	Main	E Martins	E Martins			
1788	Emily Anderson	Balance Forward		5200.00	4570.00	0				4,570.00	Main	E Martins	E Martins			
430	Jaime Anderson	Balance Forward		5000.00	3400.00	0				3,350.00	Satellite	E Martins	E Martins			
366	Jonathan Anderson	Balance Forward		5000.00	5000.00	0				5,081.80	Satellite	E Martins	E Martins			
365	Keith Anderson	Balance Forward		5200.00	2425.00	0				3,175.00	Satellite	E Martins	E Martins			
11	Melanie Anderson	Initial Fee		8275.00	2482.50	0					Main	E Martins				am
11	Melanie Anderson	Check Payment 121		0	0	1500.00					Main	E Martins				am
367	Nathan Anderson	Balance Forward		5400.00	4520.00	0				4,520.00	Satellite	E Martins	E Martins			
391	Katie Auchter	Balance Forward		5000.00	2000.00	0				2,000.00	Main	E Martins	E Martins			
879	Kellie Balderama	Balance Forward		5200.00	2050.00	0				2,050.00	Satellite	E Martins	E Martins			
1745	Kristin Banks	Balance Forward		5800.00	3650.00	0				3,650.00	Satellite	E Martins	E Martins			
370	Tina Baraibar	Balance Forward		5800.00	5800.00	0				5,800.00	Satellite	E Martins	E Martins			
23	Peter Baribeau	Balance Forward		5400.00	2100.00	0				2,100.00	Main	E Martins	E Martins			
372	Brian Bartholomew	Balance Forward		5400.00	5400.00	0				5,400.00	Satellite	E Martins	E Martins			

		Production:	Charges:	Payments:	[+] Contract Adj:	[-] Contract Adj:	[+] Adjustments:	[-] Adjustments:
Selection Summary:	0 Selected	0	0	0	0	0	0	0
Window Summary:	557 Total	148,135.00	60,706.40	49,421.54	7,498.00	125.00	237.50	1,550,580.15

Figure 9-36: *Financial Day Sheet*

The top section of the Financial Day Sheet allows you to select the day for which you want to see transactions (the default date is today). As in most topsOrtho reports, you can select the office and doctor. Drag columns to reorganize the order.



The default view for transactions is All. Click on the type of transaction you would like to see and the list automatically populates. It's important to ALWAYS look at the positive and negative adjustments, along with any Change in Benefit. Whenever there are amounts in these columns, you should verify the reason.

The Financial Day Sheet is also used for voiding a transaction and changing the date of a transaction. You can only void a transaction if it has not been deposited. You'll need a password to void or change a transaction date.

		Production:	Charges:	Payments:	[+] Contract Adj:	[-] Contract Adj:	[+] Adjustments:	[-] Adjustments:
Selection Summary:	1 Selected	0	0	0	0	0	0	2,050.00
Window Summary:	557 Total	148,135.00	60,706.40	49,421.54	7,498.00	125.00	237.50	1,550,580.15

At the bottom of the report you can see a summary of the various types of transactions.

Creating the Financial Day Sheet

1. Click Matrix from the menu bar.
2. Click Financial Day Sheet. Type in your password.
3. Click the type of transactions you will like to see.

Voiding/Rescheduling a Transaction

1. Click Matrix from the menu bar.
2. Click Financial Day Sheet. Enter a password.
3. Double-click on the transaction you need to void or reschedule. Enter a password.

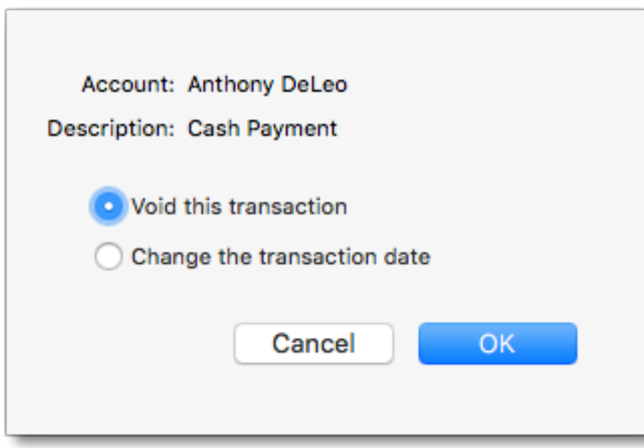


Figure 9-37: *Void a transaction*

4. Click on the appropriate button.
5. Type new date if you are rescheduling.
6. Click OK. The transaction disappears.
7. Click Show Voided in the upper right of the report to view the voided transaction. If you changed the date, the transaction will be moved to the date entered.
8. Close the list.

The Financial Day Sheet - Charges

The Financial Day Sheet shows all financial transactions that have taken place for the day. This section will concentrate on charges.

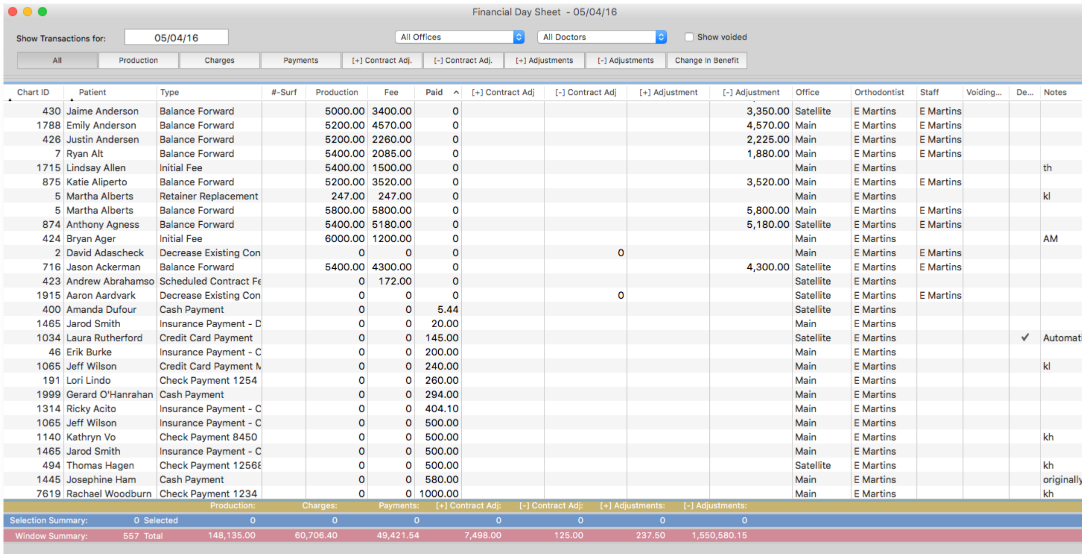


Chart ID	Patient	Type	#-Surf	Production	Fee	Paid	[+] Contract Adj	[-] Contract Adj	[+] Adjustment	[-] Adjustment	Office	Orthodontist	Staff	Voiding...	De...	Notes
430	Jaime Anderson	Balance Forward		5000.00	3400.00	0				3,350.00	Satellite	E Martins	E Martins			
1788	Emily Anderson	Balance Forward		5200.00	4570.00	0				4,570.00	Main	E Martins	E Martins			
426	Justin Andersen	Balance Forward		5200.00	2260.00	0				2,225.00	Main	E Martins	E Martins			
7	Ryan Alt	Balance Forward		5400.00	2085.00	0				1,880.00	Main	E Martins	E Martins			
1715	Lindsay Allen	Initial Fee		5400.00	1500.00	0					Main	E Martins				th
875	Katie Aliperto	Balance Forward		5200.00	3520.00	0				3,520.00	Main	E Martins	E Martins			
5	Martha Alberts	Retainer Replacement		247.00	247.00	0					Main	E Martins				kl
5	Martha Alberts	Balance Forward		5800.00	5800.00	0				5,800.00	Main	E Martins	E Martins			
874	Anthony Agness	Balance Forward		5400.00	5180.00	0				5,180.00	Satellite	E Martins	E Martins			
424	Bryan Ager	Initial Fee		6000.00	1200.00	0					Main	E Martins				AM
2	David Adascheck	Decrease Existing Con		0	0	0		0			Main	E Martins	E Martins			
716	Jason Ackerman	Balance Forward		5400.00	4300.00	0				4,300.00	Satellite	E Martins	E Martins			
423	Andrew Abrahamso	Scheduled Contract Fe		0	172.00	0					Satellite	E Martins				
1915	Aaron Aardvark	Decrease Existing Con		0	0	0		0			Satellite	E Martins	E Martins			
400	Amanda Dufour	Cash Payment		0	0	5.44					Satellite	E Martins				
1465	Jarod Smith	Insurance Payment - D		0	0	20.00					Main	E Martins				
1034	Laura Rutherford	Credit Card Payment		0	0	145.00					Satellite	E Martins			✓	Automati
46	Erik Burke	Insurance Payment - C		0	0	200.00					Main	E Martins				
1065	Jeff Wilson	Credit Card Payment N		0	0	240.00					Main	E Martins				kl
191	Lori Lindo	Check Payment 1254		0	0	260.00					Main	E Martins				
1999	Gerard O'Hanrahan	Cash Payment		0	0	294.00					Main	E Martins				
1314	Ricky Acito	Insurance Payment - C		0	0	404.10					Main	E Martins				
1065	Jeff Wilson	Insurance Payment - C		0	0	500.00					Main	E Martins				
1140	Kathryn Vo	Check Payment 8450		0	0	500.00					Main	E Martins				kh
1465	Jarod Smith	Insurance Payment - C		0	0	500.00					Main	E Martins				
494	Thomas Hagen	Check Payment 12568		0	0	500.00					Satellite	E Martins				kh
1445	Josephine Ham	Cash Payment		0	0	580.00					Main	E Martins				originally
7619	Rachael Woodburn	Check Payment 1234		0	0	1000.00					Main	E Martins				kh

		Production:	Charges:	Payments:	[+] Contract Adj:	[-] Contract Adj:	[+] Adjustments:	[-] Adjustments:
Selection Summary:	0 Selected	0	0	0	0	0	0	0
Window Summary:	557 Total	148,135.00	60,706.40	49,421.54	7,498.00	125.00	237.50	1,550,580.15

Figure 9-38: *Financial Day Sheet - Charges*

You should review the charges that have occurred each day.

Production is anything that you charge for. This does not include any adjustments.

Fees are what was actually charged to the patient.

In the figure above, under Type:

Initial Fee indicates contracts that were initiated today. The Production column shows the contract amount, while the Fee column indicates the amount charged today.

Scheduled Contract Fee is the monthly charge to the patient. These fees have no production, since the production figures were already accounted for when the initial fee was charged.

The Rollover Detail Report
This report gives a detailed account of every transaction posted to the system during rollover last night and for the date range specified. It displays Scheduled Contract Fees, Auto-Pay transactions and Late Fees.

1. Click Matrix from the menu bar.
2. Click Rollover Detail.
3. Enter your password
4. Chose date range

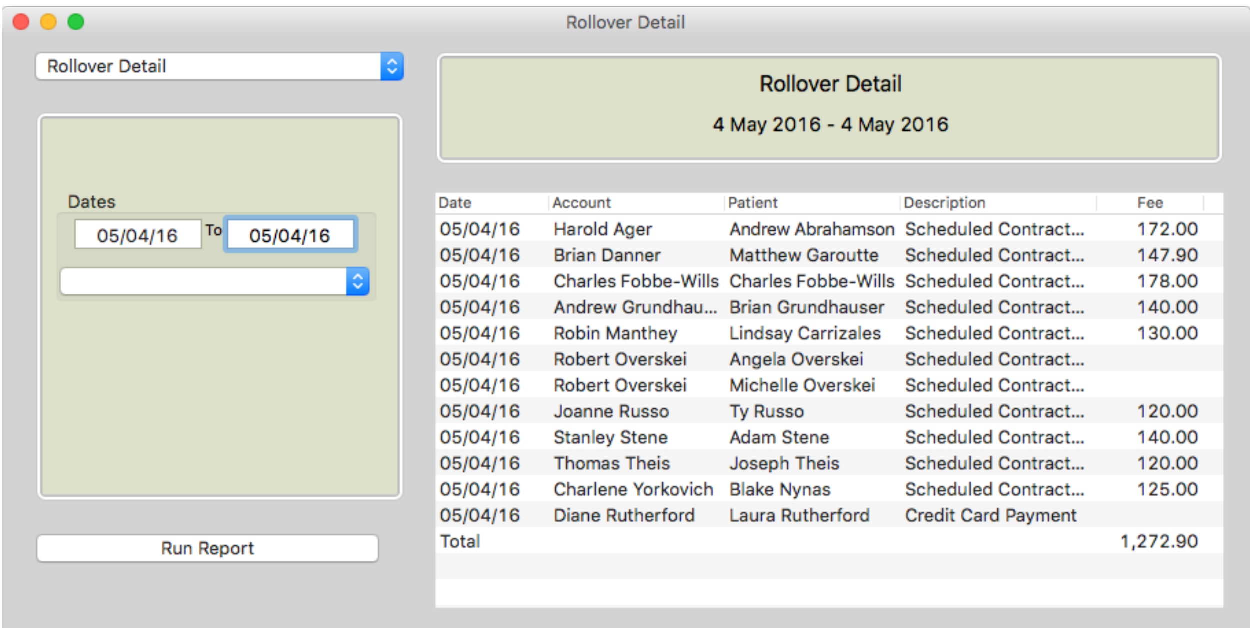


Figure 9-39: *Rollover Report*

You can verify the entries in the Rollover Detail Report with the charges in the Financial Day Sheet to see that they balance. The Rollover Detail Report can also be used for the Auto-Payment Plan verification. Be sure to run the account holder’s credit/debit card!

9G Payments - Collective Financial Management

Once the charges have been verified, you should review the payments received today. Again, the Financial Day Sheet is the perfect list to verify all payments.

The Financial Day Sheet - Payments

As you know, financial due diligence should be done on a daily basis. Do the payments on the Financial Day Sheet reflect what happened in your practice today? You can use this report for verification.

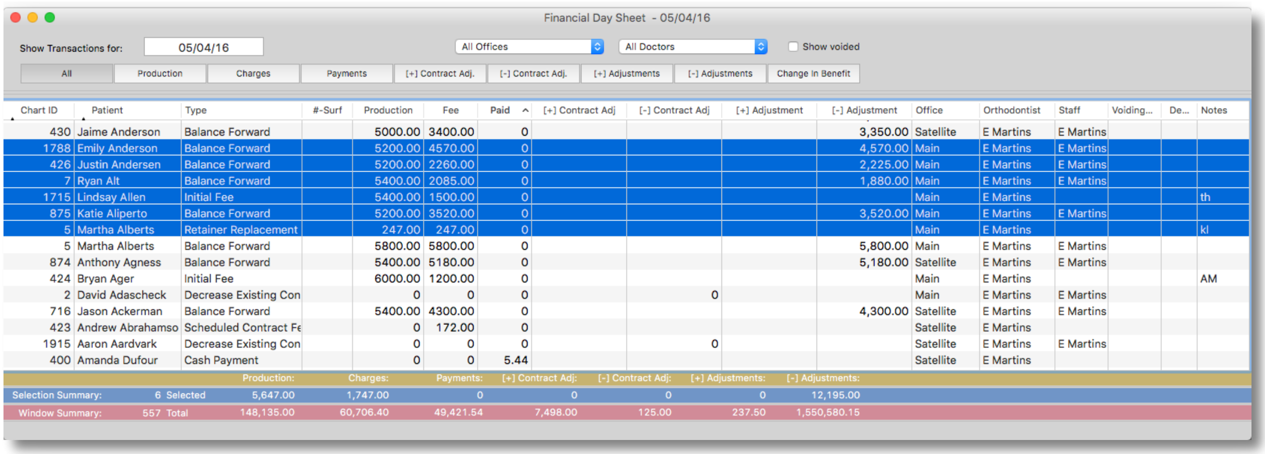


Chart ID	Patient	Type	#-Surf	Production	Fee	Paid	[+] Contract Adj	[-] Contract Adj	[+] Adjustment	[-] Adjustment	Office	Orthodontist	Staff	Voiding...	De...	Notes
430	Jaime Anderson	Balance Forward		5000.00	3400.00	0				3,350.00	Satellite	E Martins	E Martins			
1788	Emily Anderson	Balance Forward		5200.00	4570.00	0				4,570.00	Main	E Martins	E Martins			
426	Justin Andersen	Balance Forward		5200.00	2260.00	0				2,225.00	Main	E Martins	E Martins			
7	Ryan Alt	Balance Forward		5400.00	2085.00	0				1,880.00	Main	E Martins	E Martins			
1715	Lindsay Allen	Initial Fee		5400.00	1500.00	0					Main	E Martins				th
875	Katie Aliperto	Balance Forward		5200.00	3520.00	0				3,520.00	Main	E Martins	E Martins			
5	Martha Alberts	Retainer Replacement		247.00	247.00	0					Main	E Martins				kl
5	Martha Alberts	Balance Forward		5800.00	5800.00	0				5,800.00	Main	E Martins	E Martins			
874	Anthony Agness	Balance Forward		5400.00	5180.00	0				5,180.00	Satellite	E Martins	E Martins			
424	Bryan Ager	Initial Fee		6000.00	1200.00	0					Main	E Martins				AM
2	David Adascheck	Decrease Existing Con		0	0	0		0			Main	E Martins	E Martins			
716	Jason Ackerman	Balance Forward		5400.00	4300.00	0				4,300.00	Satellite	E Martins	E Martins			
423	Andrew Abrahamso	Scheduled Contract Fe		0	172.00	0					Satellite	E Martins				
1915	Aaron Aardvark	Decrease Existing Con		0	0	0		0			Satellite	E Martins	E Martins			
400	Amanda Dufour	Cash Payment		0	0	5.44					Satellite	E Martins				

		Production:	Charges:	Payments:	[+] Contract Adj:	[-] Contract Adj:	[+] Adjustments:	[-] Adjustments:
Selection Summary:	6 Selected	5,647.00	1,747.00	0	0	0	0	12,195.00
Window Summary:	557 Total	148,135.00	60,706.40	49,421.54	7,498.00	125.00	237.50	1,550,580.15

Figure 9-40: *Financial Day Sheet - Payments*

The Deposit Slip

Whatever your protocol for depositing funds, you will use the deposit slip for processing deposits.

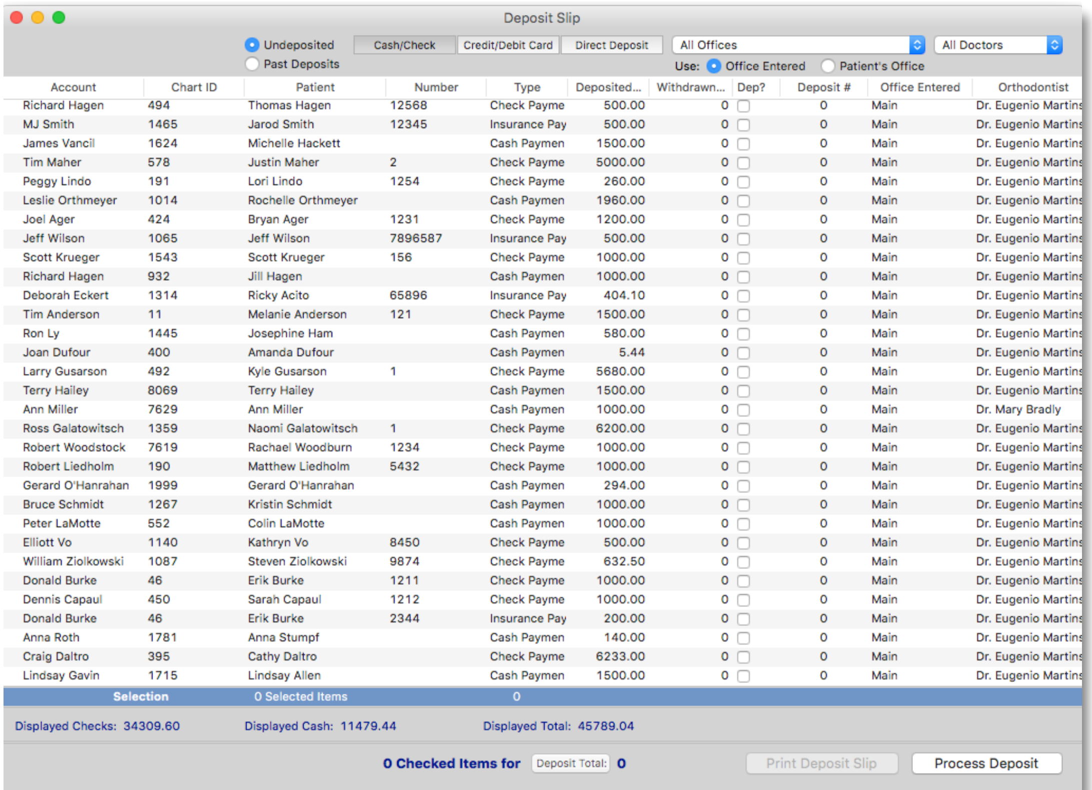
1. Money is given to your practice as payment for services. The Financial Day Sheet displays all payments that you received today.

2. The Deposit Slip shows all money deposited and their type (check, cash, credit, debit). Use the deposit slip to verify that you deposited the money.

3. The Deposit Report shows the amounts deposited according to a date range. Use the deposit report to reconcile bank records.

Creating a Deposit Slip allows you to reconcile received payments. Your office protocol will dictate how frequently this is done. A recorded Deposit Slip shows all the payments by their type, which makes verification an easier process. If you select Cash/Check, be sure to **check off only the cash and checks that you actually have in hand.** If you cannot find a check that you have listed, do not check it off. Your deposits will not be correct because the amount will remain on the Deposit Slip. The Deposit Slip requires a password to open.

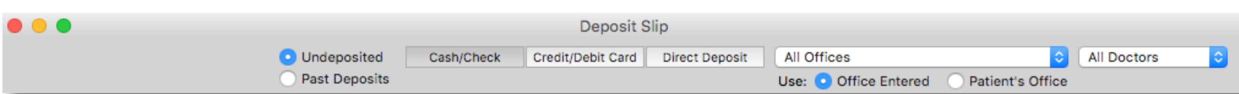
1. Click Matrix in the menu bar
2. Click Deposit Slip.
3. Enter your password.



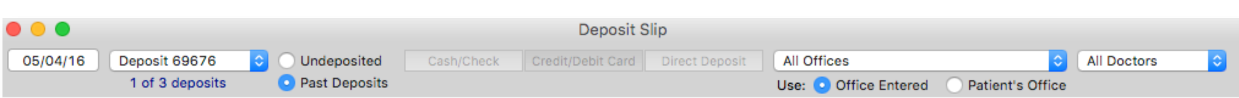
Account	Chart ID	Patient	Number	Type	Deposited...	Withdrawn...	Dep?	Deposit #	Office Entered	Orthodontist
Richard Hagen	494	Thomas Hagen	12568	Check Payme	500.00	0		0	Main	Dr. Eugenio Martins
MJ Smith	1465	Jarod Smith	12345	Insurance Pay	500.00	0		0	Main	Dr. Eugenio Martins
James Vancil	1624	Michelle Hackett		Cash Paymen	1500.00	0		0	Main	Dr. Eugenio Martins
Tim Maher	578	Justin Maher	2	Check Payme	5000.00	0		0	Main	Dr. Eugenio Martins
Peggy Lindo	191	Lori Lindo	1254	Check Payme	260.00	0		0	Main	Dr. Eugenio Martins
Leslie Orthmeyer	1014	Rochelle Orthmeyer		Cash Paymen	1960.00	0		0	Main	Dr. Eugenio Martins
Joel Ager	424	Bryan Ager	1231	Check Payme	1200.00	0		0	Main	Dr. Eugenio Martins
Jeff Wilson	1065	Jeff Wilson	7896587	Insurance Pay	500.00	0		0	Main	Dr. Eugenio Martins
Scott Krueger	1543	Scott Krueger	156	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martins
Richard Hagen	932	Jill Hagen		Cash Paymen	1000.00	0		0	Main	Dr. Eugenio Martins
Deborah Eckert	1314	Ricky Acito	65896	Insurance Pay	404.10	0		0	Main	Dr. Eugenio Martins
Tim Anderson	11	Melanie Anderson	121	Check Payme	1500.00	0		0	Main	Dr. Eugenio Martins
Ron Ly	1445	Josephine Ham		Cash Paymen	580.00	0		0	Main	Dr. Eugenio Martins
Joan Dufour	400	Amanda Dufour		Cash Paymen	5.44	0		0	Main	Dr. Eugenio Martins
Larry Gusarson	492	Kyle Gusarson	1	Check Payme	5680.00	0		0	Main	Dr. Eugenio Martins
Terry Hailey	8069	Terry Hailey		Cash Paymen	1500.00	0		0	Main	Dr. Eugenio Martins
Ann Miller	7629	Ann Miller		Cash Paymen	1000.00	0		0	Main	Dr. Mary Bradly
Ross Galatowitsch	1359	Naomi Galatowitsch	1	Check Payme	6200.00	0		0	Main	Dr. Eugenio Martins
Robert Woodstock	7619	Rachael Woodburn	1234	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martins
Robert Liedholm	190	Matthew Liedholm	5432	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martins
Gerard O'Hanrahan	1999	Gerard O'Hanrahan		Cash Paymen	294.00	0		0	Main	Dr. Eugenio Martins
Bruce Schmidt	1267	Kristin Schmidt		Cash Paymen	1000.00	0		0	Main	Dr. Eugenio Martins
Peter LaMotte	552	Colin LaMotte		Cash Paymen	1000.00	0		0	Main	Dr. Eugenio Martins
Elliott Vo	1140	Kathryn Vo	8450	Check Payme	500.00	0		0	Main	Dr. Eugenio Martins
William Ziolkowski	1087	Steven Ziolkowski	9874	Check Payme	632.50	0		0	Main	Dr. Eugenio Martins
Donald Burke	46	Erik Burke	1211	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martins
Dennis Capaul	450	Sarah Capaul	1212	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martins
Donald Burke	46	Erik Burke	2344	Insurance Pay	200.00	0		0	Main	Dr. Eugenio Martins
Anna Roth	1781	Anna Stumpf		Cash Paymen	140.00	0		0	Main	Dr. Eugenio Martins
Craig Daltro	395	Cathy Daltro		Check Payme	6233.00	0		0	Main	Dr. Eugenio Martins
Lindsay Gavin	1715	Lindsay Allen		Cash Paymen	1500.00	0		0	Main	Dr. Eugenio Martins

Figure 9-41: *Deposit Slip*

Let’s look at each section in the Deposit slip.



The default displays Undeposited items. You can click on Past Deposits, select a date, and topsOrtho will display the number of deposits made on that day. You can select a deposit number from the drop-down menu and click to display that deposit slip.



Click on the type of deposit you are making–Cash/Check, Credit/Debit Card or Direct Deposit. Each type generate a separate deposit slip so that it’s easy to reconcile.

If you have several offices, you can select one. You can also choose to deposit items by doctor.

Each column displays information about the transaction. If you would like to know the total of a few transactions taken in, select the transactions by holding down the Command key and clicking on each or click and drag. The Selection Summary will display the total cash at the bottom of the screen.

A summary of the total amount of undeposited items will display at the bottom of the Deposit Slip. In this example, checks and cash are totaled.

Check off each item that you have in your hands. As you check off each item, watch the Checked Items at the bottom of the screen. Always verify.

After verifying, you can process the deposit and then print the deposit slip. The printed slip should be banded together with the transaction type and submitted to the bank.

Click the next transaction type and do the same procedure.

Creating a Deposit Slip
1. Click Matrix from the menu bar.
2. Click Deposit Slip. Enter your password.
3. Select the transaction type. Cash/Checks are the default.
4. Click each transaction box individually, only when you have the item in your hands.
5. VERIFY, VERIFY, VERIFY!
6. Click Process Deposit.
7. If correct, there are 2 options to print the Deposit Slip:
    1. Press Command + P or File and Print to print.
        - Either of these printing options will print a Deposit Slip that looks similar to the Deposit window.
    2. Or, press the Print Deposit Slip button. You will need to use Deluxe Forms #81019. This form is available from www.deluxeforms.com.
        - This printing option must be used with the Deposit Slip form or it will print out as numbers on a blank sheet of paper.
8. Click OK.

The Deposit Report

The deposit report lists all deposits processed within the specified date range. You can select a deposit and open it from the Deposit Slip list. You can also print from here. The Deposit Report requires a password to open.

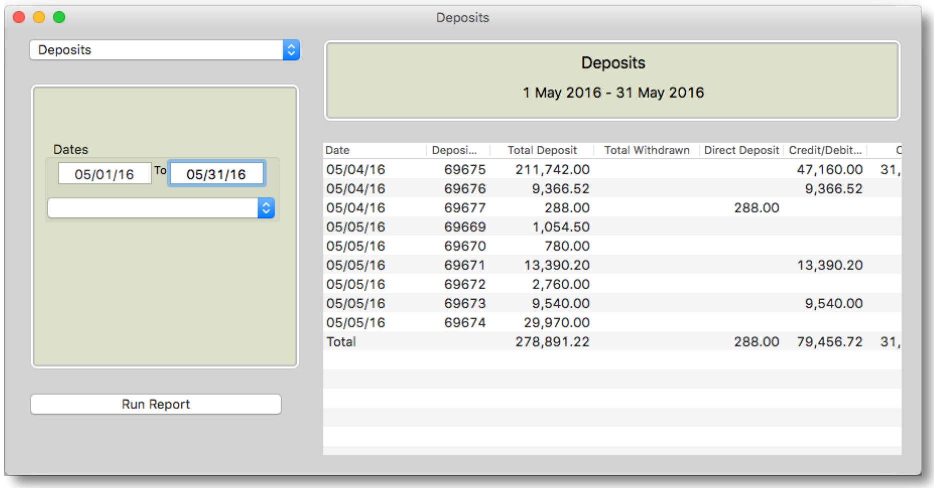


Figure 9-42: *The Deposit Report*

Creating the Deposit Report

1. Click Reports from the menu bar.
2. Click Deposits. Enter your password.

Opening a Past Deposit Report

1. Enter a different date range, if desired.
2. Click Run Report.
3. Click on the deposit you would like to open.
4. Click Open deposit group number.
5. The deposit slip will open. You can view and print individual deposit transactions.

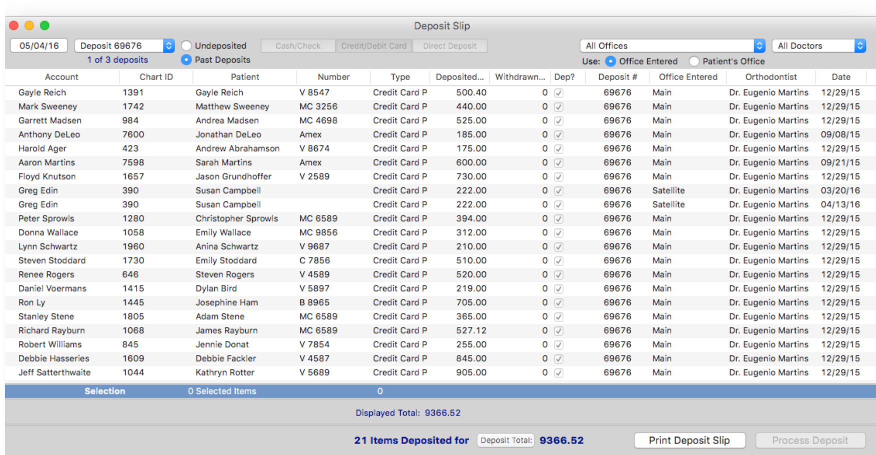
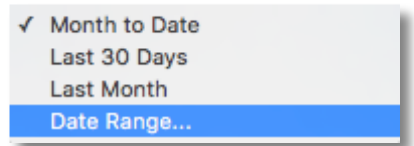


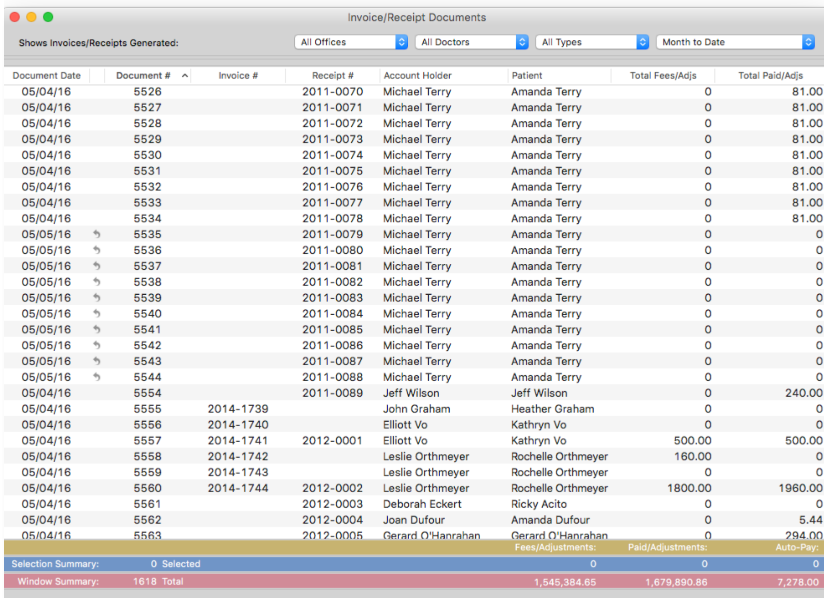
Figure 9-43: *Deposit Slip*

Receipts

Whenever a transaction is created, a receipt is generated in topsOrtho. Each receipt generated will have a unique receipt number that cannot be edited. You can view a patient's receipts in the Receipts tab in Patient Information. A list of all receipts are available from the Matrix menu by designating a date range.

1. Click Matrix from the menu bar
2. Click Invoices/Receipts
3. Enter your password
4. Designate a date range using the pull down menu on the right of the window.





Invoice/Receipt Documents

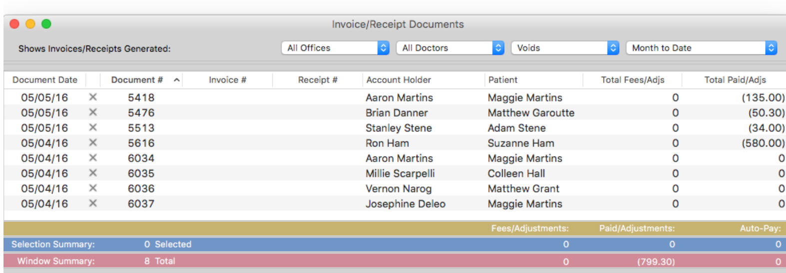
Shows Invoices/Receipts Generated: All Offices | All Doctors | All Types | Month to Date

Document Date		Document #	Invoice #	Receipt #	Account Holder	Patient	Total Fees/Adjs	Total Paid/Adjs
05/04/16		5526		2011-0070	Michael Terry	Amanda Terry	0	81.00
05/04/16		5527		2011-0071	Michael Terry	Amanda Terry	0	81.00
05/04/16		5528		2011-0072	Michael Terry	Amanda Terry	0	81.00
05/04/16		5529		2011-0073	Michael Terry	Amanda Terry	0	81.00
05/04/16		5530		2011-0074	Michael Terry	Amanda Terry	0	81.00
05/04/16		5531		2011-0075	Michael Terry	Amanda Terry	0	81.00
05/04/16		5532		2011-0076	Michael Terry	Amanda Terry	0	81.00
05/04/16		5533		2011-0077	Michael Terry	Amanda Terry	0	81.00
05/04/16		5534		2011-0078	Michael Terry	Amanda Terry	0	81.00
05/05/16	↰	5535		2011-0079	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5536		2011-0080	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5537		2011-0081	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5538		2011-0082	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5539		2011-0083	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5540		2011-0084	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5541		2011-0085	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5542		2011-0086	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5543		2011-0087	Michael Terry	Amanda Terry	0	0
05/05/16	↰	5544		2011-0088	Michael Terry	Amanda Terry	0	0
05/04/16		5554		2011-0089	Jeff Wilson	Jeff Wilson	0	240.00
05/04/16		5555	2014-1739		John Graham	Heather Graham	0	0
05/04/16		5556	2014-1740		Elliott Vo	Kathryn Vo	0	0
05/04/16		5557	2014-1741	2012-0001	Elliott Vo	Kathryn Vo	500.00	500.00
05/04/16		5558	2014-1742		Leslie Orthmeyer	Rochelle Orthmeyer	160.00	0
05/04/16		5559	2014-1743		Leslie Orthmeyer	Rochelle Orthmeyer	0	0
05/04/16		5560	2014-1744	2012-0002	Leslie Orthmeyer	Rochelle Orthmeyer	1800.00	1960.00
05/04/16		5561		2012-0003	Deborah Eckert	Ricky Acito	0	0
05/04/16		5562		2012-0004	Joan Dufour	Amanda Dufour	0	5.44
05/04/16		5563		2012-0005	Gerard O'Hanrahan	Gerard O'Hanrahan	0	294.00

		Fees/Adjustments:	Paid/Adjustments:	Auto-Pay:
Selection Summary:	0 Selected	0	0	0
Window Summary:	1618 Total	1,545,384.65	1,679,890.86	7,278.00

Figure 9-44: *Receipts*

You are not allowed to delete a receipt. If you void a transaction in the Financial Day Sheet that has not been deposited, a receipt is generated indicating the voided transaction. This receipt appears with an X located to the left of the receipt number. An arrow indicates a date change.



Invoice/Receipt Documents

Shows Invoices/Receipts Generated: All Offices | All Doctors | Voids | Month to Date

Document Date		Document #	Invoice #	Receipt #	Account Holder	Patient	Total Fees/Adjs	Total Paid/Adjs
05/05/16	×	5418			Aaron Martins	Maggie Martins	0	(135.00)
05/05/16	×	5476			Brian Danner	Matthew Garoutte	0	(50.30)
05/05/16	×	5513			Stanley Stene	Adam Stene	0	(34.00)
05/04/16	×	5616			Ron Ham	Suzanne Ham	0	(580.00)
05/04/16	×	6034			Aaron Martins	Maggie Martins	0	0
05/04/16	×	6035			Millie Scarpelli	Colleen Hall	0	0
05/04/16	×	6036			Vernon Narog	Matthew Grant	0	0
05/04/16	×	6037			Josephine Deleo	Maggie Martins	0	0

		Fees/Adjustments:	Paid/Adjustments:	Auto-Pay:
Selection Summary:	0 Selected	0	0	0
Window Summary:	8 Total	0	(799.30)	0

Figure 9-45: *Voided and Refunded Receipts*

9H Past Due Balance - Collective

Staying on top of past due balances is critical. topsOrtho's Reporting functions help to make this manageable. The Accounts Receivable Report and the Statement Lists help.

Accounts Receivable Report

The Accounts Receivable report displays a list of all patients with either a positive or negative balance due. This report not only displays balances, but also aging, along with the date of the last payment. With this report, it's easy to find delinquent accounts. As part of your financial due diligence, this report should be used on a weekly basis. The Accounts Receivable Report requires a password.

1. Click Matrix from the menu bar
2. Click Accounts Receivable
3. Enter your password

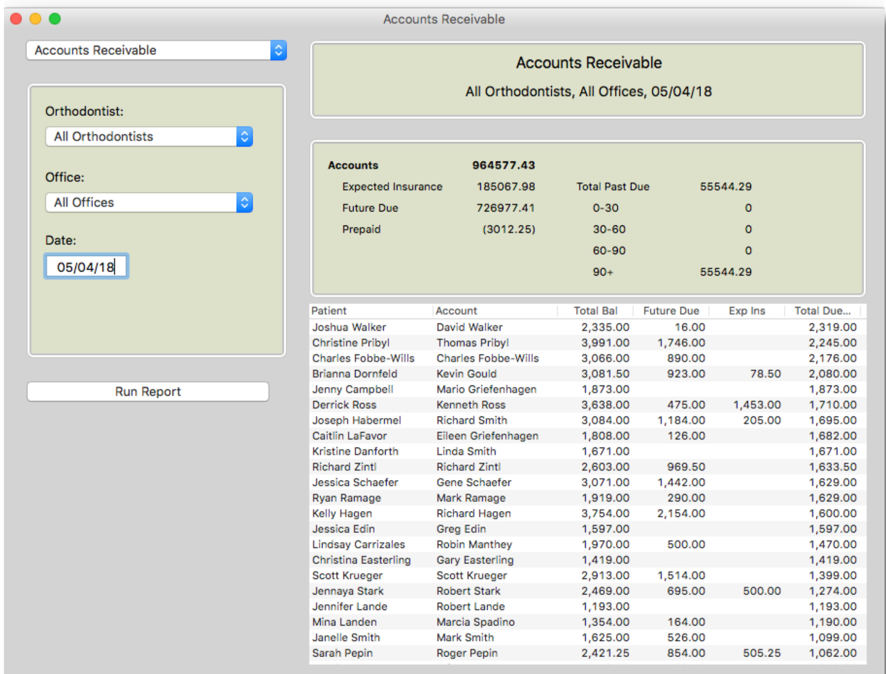


Figure 9-46: *Accounts Receivable Report*

You can move columns by placing the mouse pointer on the column heading. The mouse becomes a hand. Drag the column to the location that you find easier to focus on.

You can sort the columns in ascending or descending order by clicking on the column header. The arrow indicates which order you are viewing. This report is "hot clickable," which means that you can double-click on a patient name and the Patient Information window will open. This way, you can look to see if there is a reason why a patient is behind on his payments.

As with most topsOrtho reports, you can select a different date and run the report for a specific office or doctor.

Accounts Receivable Columns
- Patient
- Account
- Total Balance
- Future
- Expected Insurance
- Total Due
- 0 - 30
- 30 - 60
- 60 - 90
- 90 +
- Last Payment Date
- Last Payment Amount
- Last Payment Due

Creating the Accounts Receivable Report
1. Click Reports from the menu bar.
2. Click Accounts Receivable. Enter your password.
3. Sort by the column of your choice.
4. Arrange the columns to your satisfaction.

Summary

In this lesson, you should feel confident with:
- Entering individual charges
- Creating contracts
- Entering contract discounts
- Creating and understanding auto-payment plans
- Printing ledger receipts
- Understanding statements
- Using various reports and lists for charges and payments
- Verifying past due balances

Lesson 10 Insurance

Lesson Ten Overview

This lesson focuses on creating contracts with insurance and managing claims in your practice. If you accept insurance assignment, it's important that you understand this lesson.

Objectives:

To become familiar with insurance, you will:

10A Enter Insurance Information
Enter the appropriate insurance information for your patient.

10B Enter Policy Information
Create the appropriate policy information by employer.

10C Create Contracts with Insurance
Create a contract with insurance.

10D File Claims
Create and file claims with the insurance companies.

10E Manage Claims
Manage the Accounts Receivable on your submitted claims.

10F Enter Insurance Payments
Entering insurance payment transactions.

10G Increase/Decrease Insurance Benefits
Change Insurance benefits for a patient

10A Entering Insurance Information

topsOrtho allows you to keep an eye on the money received and expected by the insurance companies from which you accept assignment of benefits. You may enter up to four insurance policyholders for each patient. If you accept assignment from more than two policyholders, you must choose the secondary insurance that will appear in the secondary insurance portion of the claim form. This feature will be discussed in detail later in the lesson.

topsOrtho also creates one contract by combining the patient portion with the expected insurance portion. You will not have two separate contracts, e.g., one for the patient and one for the expected insurance. As you learned earlier, you can have separate ledgers displayed. When accepting payments you are able to see what the insurance company has paid as well as what the patient has paid. Or, if you choose, you can see the ledgers individually.

To begin accepting assignment, you'll need:

Policy Holder
Policy Holder name, address, and phone number.
Patient's relationship to the policy holder.
Policy Holder employer.

Employer Policy
Employer name, address, phone.
Employer contact.
Employer Group Number

Insurance Company
Full name, address, and phone number.
Insurance company contact name.
Payer ID and Type, if filing electronically

How topsOrtho makes accepting assignment easier for you:
- Easy access to insurance company payment guidelines.
- Quickly view all patients listed under the same employer policies.
- An insurance ledger can be viewed separately or combined with the co-payment ledger to view payments.
- Claims can be filed electronically quickly and easily.
- Claims are created-and stored in the patient's information automatically each time they are created.
- Claims can be reprinted easily for resubmission.
- Claims are filled out automatically.
- Claims lists and reports allow you to easily track when you are not getting expected payments from insurance companies.
- Entering payments for multiple patients on a single insurance check is a breeze.

Entering Policy Holder #1

1. Open the Patient Information window.
2. Click Insurance 1.

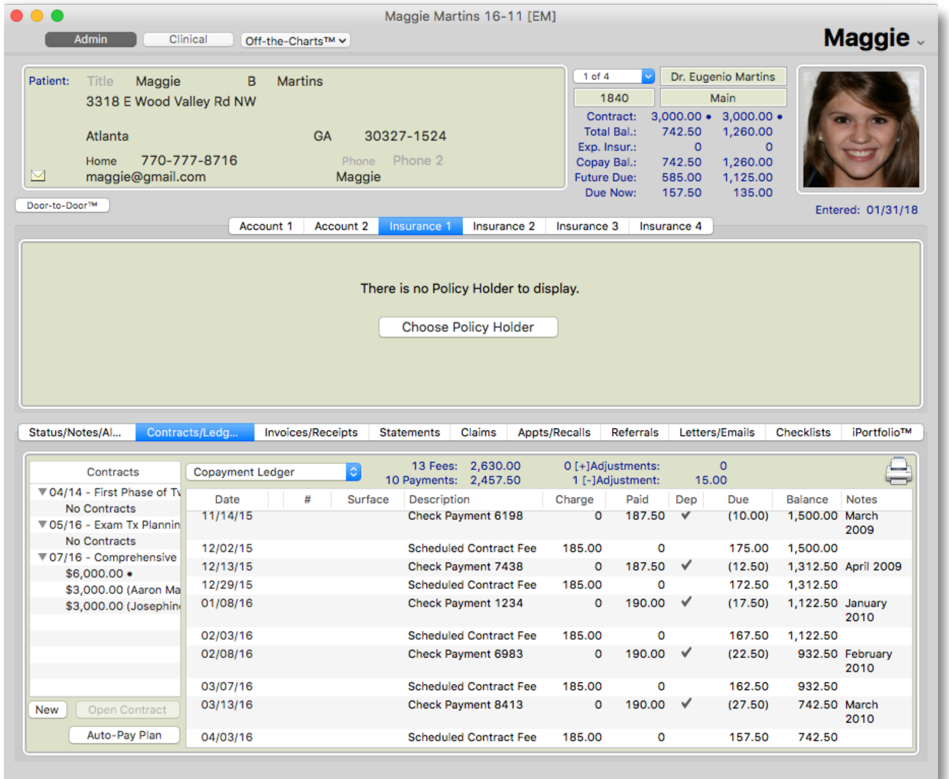


Figure 10-1: *Entering Policy Holder Information*

3. Click Choose Policy Holder.
4. Enter the Policy Holder Last Name to search.
5. Click Find. If there are no policyholders with the correct information, you must enter the info.
6. Click Create New Policy Holder. The Policy holder information populates according to the Account Holder if the name is the same. If this is not correct, fill in the fields by clicking in each and typing the correct information.

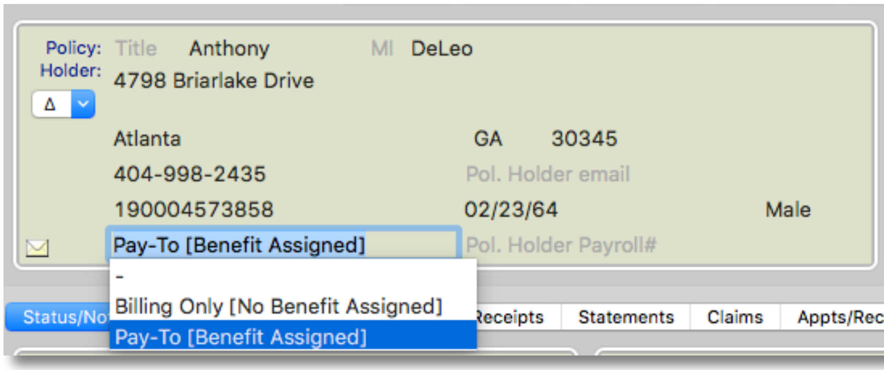


Figure 10-2: *Policy Holder 1*

7. Fill in all the information.
8. If insurance is paid to the Doctor, use Pay-To (Benefit Assigned). If insurance is paid to the Policy Holder, use Billing Only (No Benefit Assigned).

If you are entering the Social Security number for the policy holder, do not include dashes. Policy Holder Payroll # is used if the policy holder is a member of a union.

10B Entering Policy Information

Once you have created the Policy Holder Information, you will need to fill in the employer and policy information to generate accurate claims.

The patient will fill in this information and send the form for reimbursement.

1. Click the Employer... button.

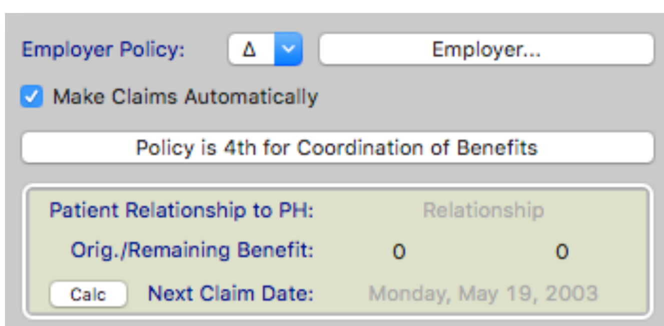


Figure 10-3: *Employer button*

2. Enter the name of the Employer to search for.
3. Click Find. This will open the Employer Policy Information window.

Figure 10-4: *Employer Policy Information*

Enter all the information that you can about the employer and insurance company. If you are going to file claims electronically you must enter the Payer ID and Payer Type which can be found by opening the e-Claim Insurance Payer List.

Section One

This section contains information about the policy holder's employer.

Figure 10-5: *Employer Information*

Section Two
This section contains information about the insurance company. If you will electronically file claims, click the link to e-Claim Insurance Payer List. A list from Emdeon Dental will open. This is where you will find the Payer ID and Payer Model types for e-Claim submission.

Figure 10-6: *Insurance Company Information*

Section Three
This section contains information about the individual policy. Fill in as much as you can. If you are filing electronically make sure the ADA 2012 Claim for is selected. If there is more than one insurance company and you must wait for the primary to pay before submitting the secondary insurance, check the Must wait for response from primary to submit checkbox. If you select this button, claims will display on the Unsent Missing-Info Claims List as Waiting on Primary.

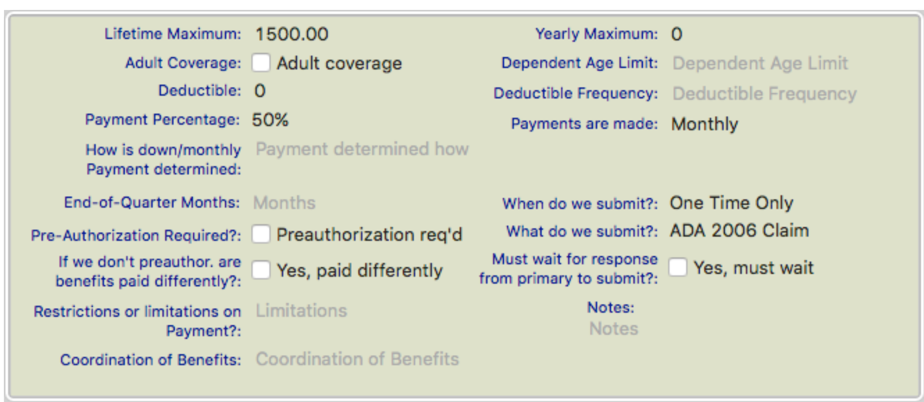
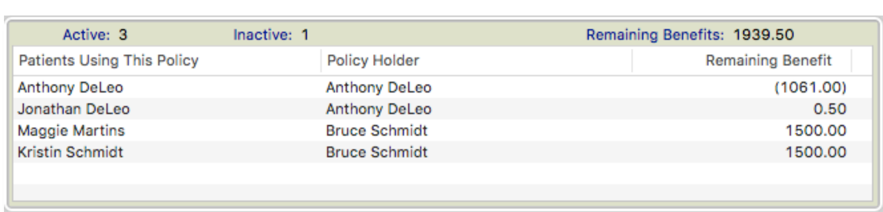


Figure 10-7: *Policy Information*

Section Four
This section indicates the active and inactive patients that hold this policy, along with the remaining benefits.



Active: 3 Inactive: 1 Remaining Benefits: 1939.50

Patients Using This Policy	Policy Holder	Remaining Benefit
Anthony DeLeo	Anthony DeLeo	(1061.00)
Jonathan DeLeo	Anthony DeLeo	0.50
Maggie Martins	Bruce Schmidt	1500.00
Kristin Schmidt	Bruce Schmidt	1500.00

Figure 10-8: *Patients Using This Policy*

If you've made a mistake and need to select a different employer, just click the Delta symbol and choose the appropriate item from the drop-down menu.

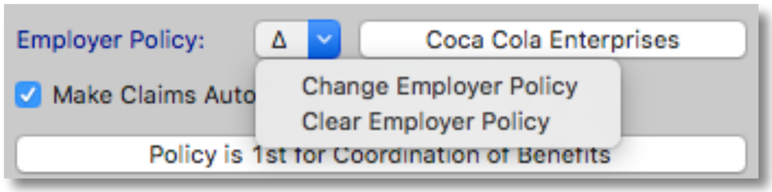


Figure 10-9: *Change or Clear Employer Policy Information*

Automatically Generate Claims for your Patient
If you would like to automatically generate claims for your patient verify that the Make Claims Automatically is checked and always click Calc button to fill in the next claim date.

Figure 10-10: *Make Claims Automatically*

1. Verify that the Make Claims Automatically is checked.
2. Click Calc button to calculate the next claim date based on the information that you entered on the Insurance Policy.

Secondary Insurance
When a patient has two insurance policy holders, (primary and secondary) the secondary insurance company will display in the secondary insurance portion of the claim form when generated. Notice the Policy is 1st for Coordination of Benefits, click this button to reorganize if there are multiple policies.

Entering a New Employer Policy
You can also enter employer policy information by using the View menu.

1. Click View from the menu bar.
2. Click Employer Policy.
3. Search the Employer Policy.
4. Click Create New Employer Policy if needed.

Viewing a List of Employer Policies
1. Click View from the menu bar.
2. Click Employer Policies.

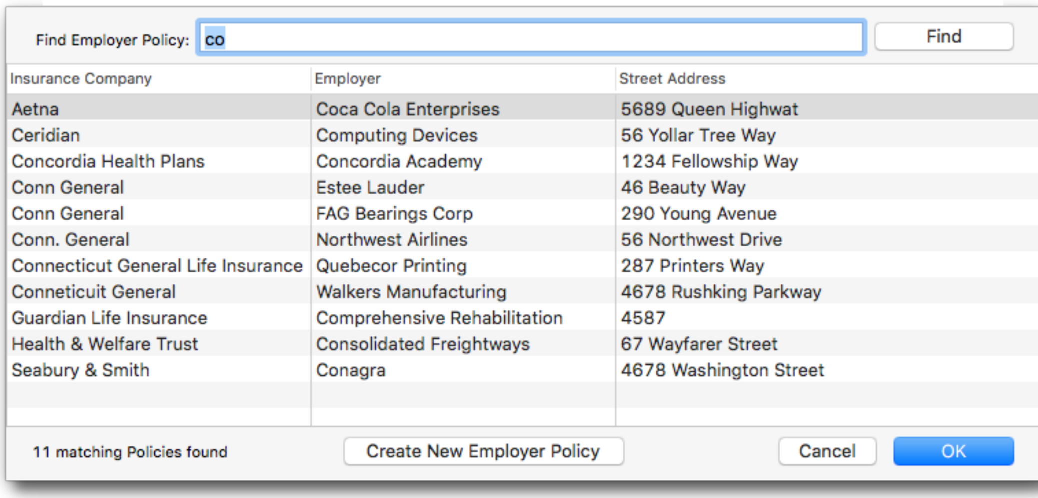


Figure 10-11: *Employer Policies List*

10C Contracts with Insurance

Once you have successfully entered the policyholder, employer and policy information, you're ready to start entering information into the patient's contract. Lesson Ten gave you the basic information about creating contracts. To create a contract with insurance, you'll perform the same steps with the exception of accepting assignment.

Creating a Contract with Expected Insurance
1. Open the Patient Information window.
2. Click the Contracts/Ledger/Auto-Pay tab.

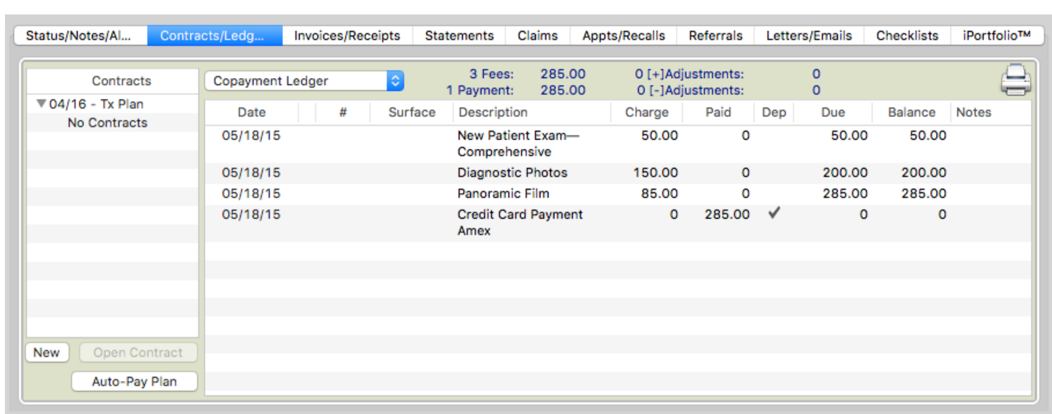


Figure 10-12: *Contracts/Ledger/Auto-Pay tab*

3. Click the New button to create a contract. The Contract Worksheet displays.
4. Click Quick Contract. The Quick Contract window displays.

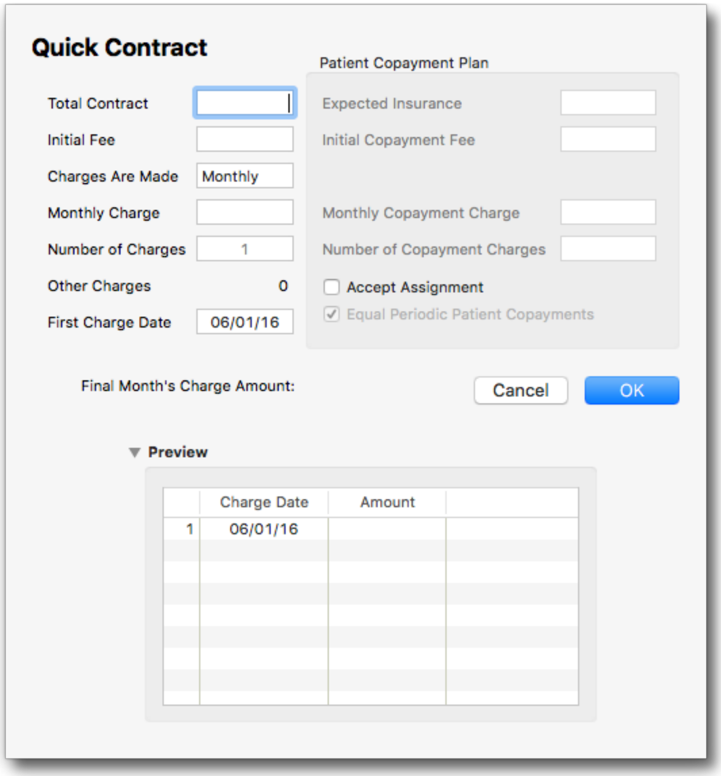


Figure 10-13: *Quick Contract*

You learned in Lesson Ten that the left side of Quick Contract is used to enter contract totals regardless of insurance. These are the numbers the insurance company will see on the claim form. The left side of Quick Contract reflects the true contract total. The patient co-pay is not entered on the left side.

The right side of the Quick Contract is for entering totals based on insurance benefit.

Expected Insurance–The amount you expect insurance companies to pay for this patient's treatment. This includes the amount you expect to receive from ALL insurance policies for this patient.

Initial Co-Payment Fee–The portion of the initial fee for which the patient is responsible. This is the amount that will actually be charged to the patient when appliances are placed.

Monthly Co-Payment Charge–The amount of the contract that the patient is charged every month.

Number of Co-Payment Charges–The number of monthly charges the patient will be billed.

Accept Assignment–This must be checked first, before any field is available on the right side of the worksheet.

Calculating Expected Insurance
There are several ways to accommodate expected insurance. How you choose to apply expected insurance will depend on your office philosophy, individual state requirements, and the demographics of the patients at your particular office location. Please refer to your individual state laws regarding requirements for the application of expected insurance benefits, as they vary from state to state.

Below are some options to consider for using expected insurance. These options are not directions for your office; they're just examples.

Initial Copayment Fee:
This is entered in the contract worksheet as the amount actually charged to the patient.

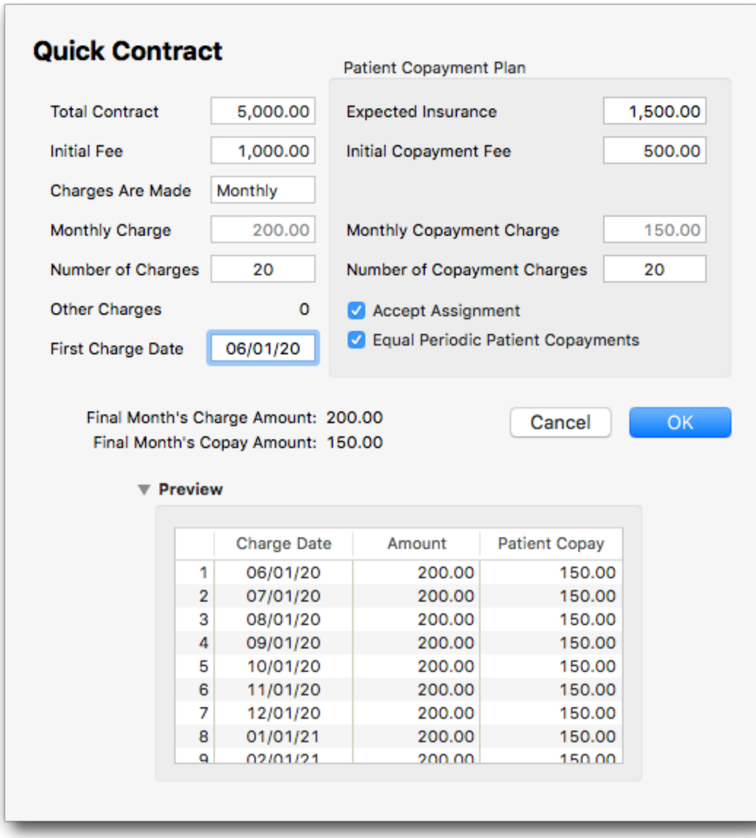
Option 1: The Initial Copayment Fee can be calculated as the Initial Fee minus any amount of the Initial Fee that the insurance company is expected to pay.

Option 2: The Initial Copayment Fee can be charged as the entire Initial Fee with all of the patient's Expected Insurance applied to the monthly contract fees.

Option 1 Example:
The Initial Copayment Fee is reduced by the percentage the insurance company is expected to pay. In this example the insurance company is expected to pay 50 percent of the initial fee charged.

The Initial Fee for the contract is $1,000.00, but we will charge the patient 50 percent ($500.00) and wait to collect the remaining 50 percent from the insurance company.

How the worksheet works:



On the left side is what the total contract is and what the insurance company will see on the claim forms. The right side is what the copay amounts are after subtracting the expected insurance.

Left Side (Contract Total)		**Right Side (Co-Payments)**	
Total Contract	5000.00	Total Contract	5000.00
Minus Initial Fee	1000.00	Minus Exp Ins.	1500.00
		Minus CoPay	500.00
Equals	4000.00	Equals	3000.00
20 x 200.00 =	4000.00	20 x 150.00 =	3000.00

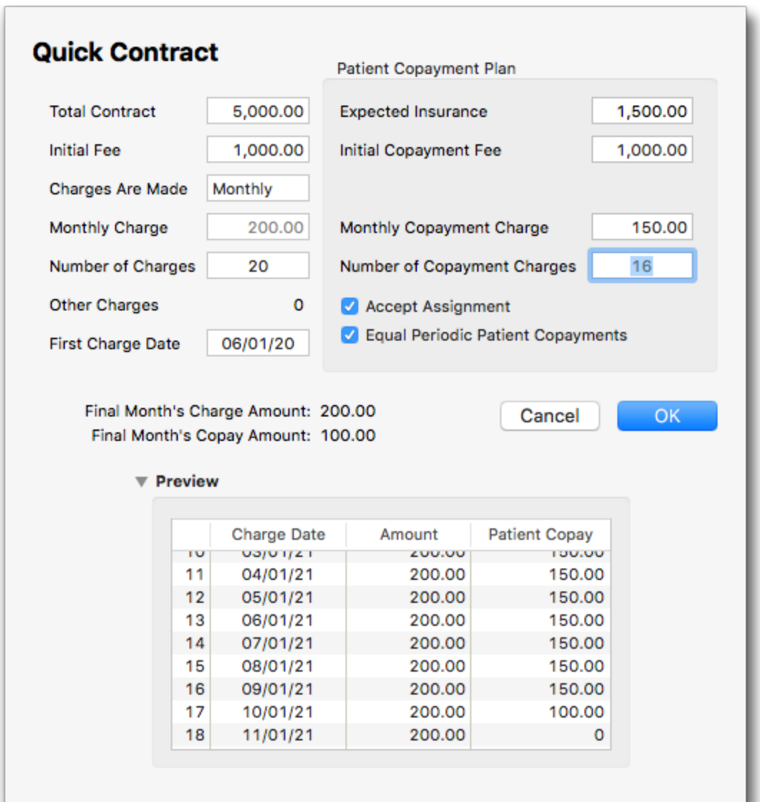
The monthly co-payments have been reduced by $50.00 a month because of the expected insurance benefits.

Expected Benefit 1500.00
Minus 500.00 payment of the Initial Fee (50%) of submitted
Equals 1000.00 divided by 20 equals 50.00. The reduced monthly charge amount.

Option 2A Example:
The monthly co-payment amount is the same as the actual contract amount. Expected Insurance is applied at the end of the contract, essentially giving the patient several "free" months on their contract.

The number of co-payment charges have been reduced as the monthly co-payment charge of $150.00 has been kept.

How the worksheet works:



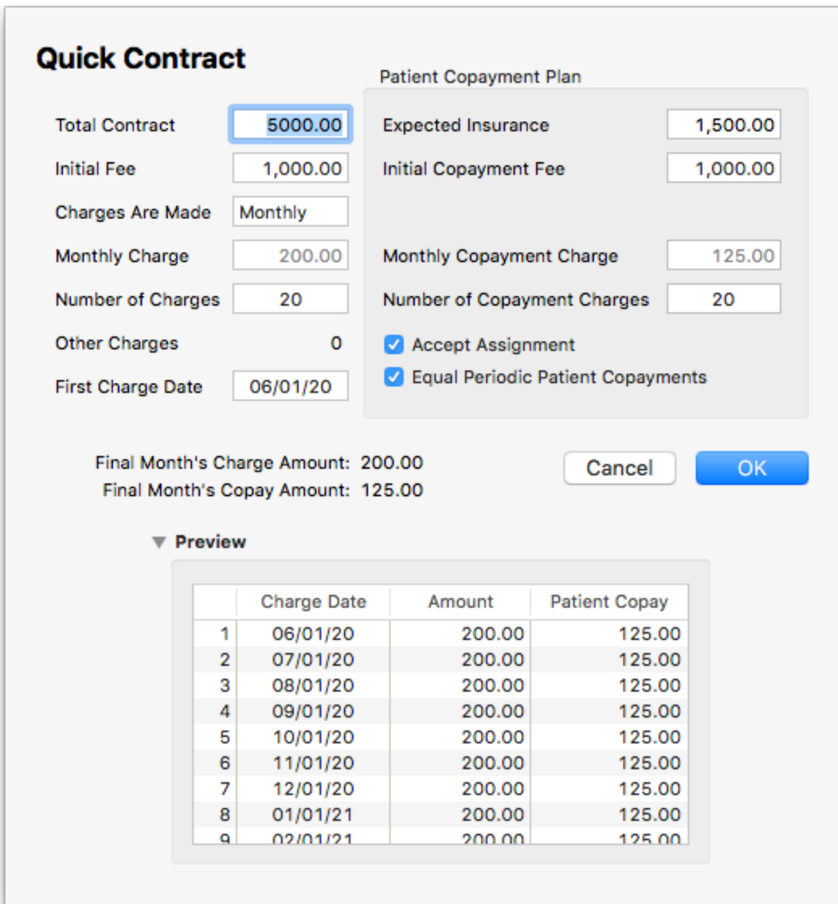
Left Side (Contract Total)		**Right Side (Co-Payments)**	
Total Contract	5000.00	Total Contract	5000.00
Minus Initial Fee	1000.00	Minus Exp Ins.	1500.00
		Minus CoPay	1000.00
Equals	4000.00		2500.00
20 x 200.00 =	4000.00	16 x 150.00 =	2400.00
		1 x 100.00	100.00

The monthly co-payments have stayed the same but because of the increase in the initial co-payment, have been reduced to 17 charges, not 20. The last three charges will display as $0.

Option 2B Example:
The monthly copayment amount has been reduced with the same number of monthly charges as the contract.

The number of co-payment charges have remained the same as the contract so the monthly charge has been reduced to $125

How the worksheet works:



Left Side (Contract Total)		**Right Side (Co-Payments)**	
Total Contract	5000.00	Total Contract	5000.00
Minus Initial Fee	1000.00	Minus Exp Ins.	1500.00
		Minus CoPay	1000.00
Equals	4000.00		2500.00
20 x 200.00 =	4000.00	20 x 125.00 =	2500.00

The monthly co-payments have been reduced.

5. Once you and the patient decide on the best payment plan option, click OK to go back to the Contract Worksheet.

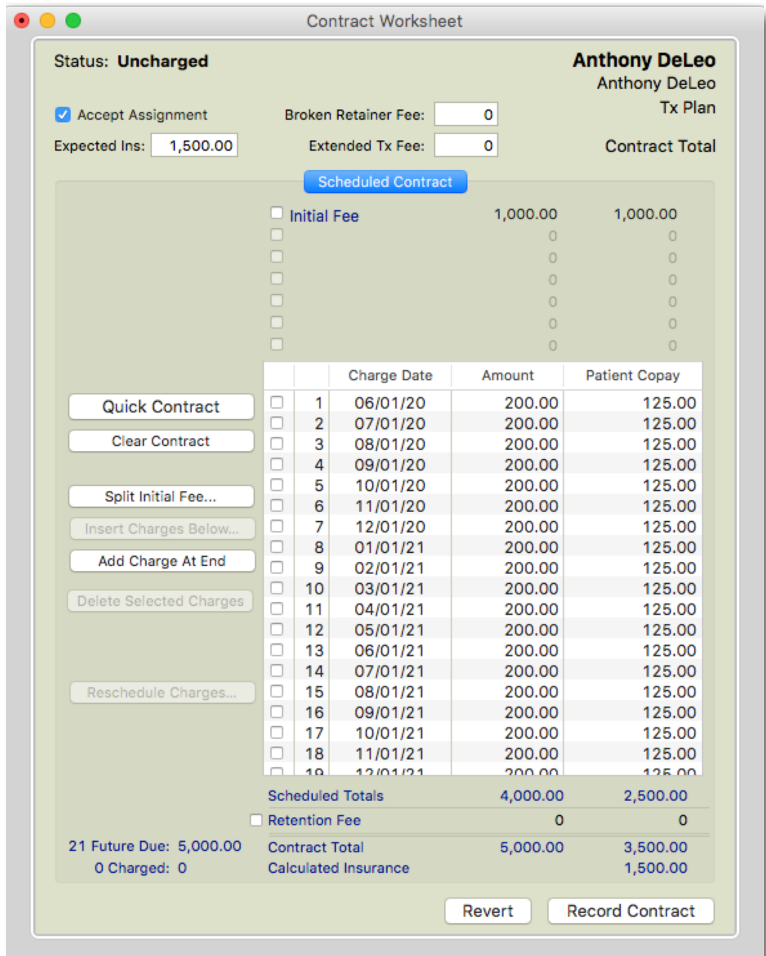


Figure 10-14: *Contract Worksheet with Insurance*

6. Click the Record Contract button. The account holder's name will appear to the right of the contract amount.

Initiating/Activating an Insurance Contract

Activating a contract with insurance is the same as without insurance. You must charge the initial fee.

Always remember the acronym TIC

T - Treatment Plan
I - Insurance Information
C - Contract

If you create the above items in the above order, creating a contract with insurance is an easy process.

1. Click Action from the menu bar.
2. Click New Transaction.
3. Select the Initial Fee for the fee/procedure.
4. Press Tab.
5. Select the Treatment Plan you will be activating.

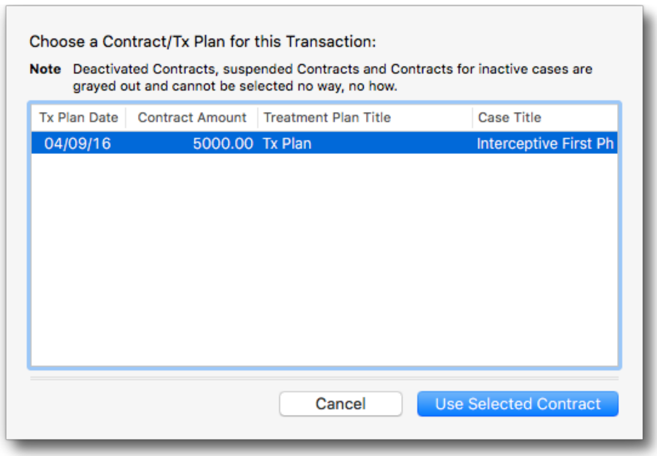


Figure 10-15: *Choose a Contract/Tx Plan*

6. Click Use Selected Contract.

   If the Dental Classification and Treatment Type has not been filled in, you will need to select it when generating a claim. This information is required to file the claim. If this information has already been entered, please skip to step 7.
   If required:
   - Select the Dental Classification.
   - Select the Treatment Type.
   - Click OK.
7. Press Tab to enter the payment information.
8. Click Add Transaction to tops.

As soon as you add the transaction, topsOrtho automatically generates a claim form based on the information that you entered in the contract and the form you chose.

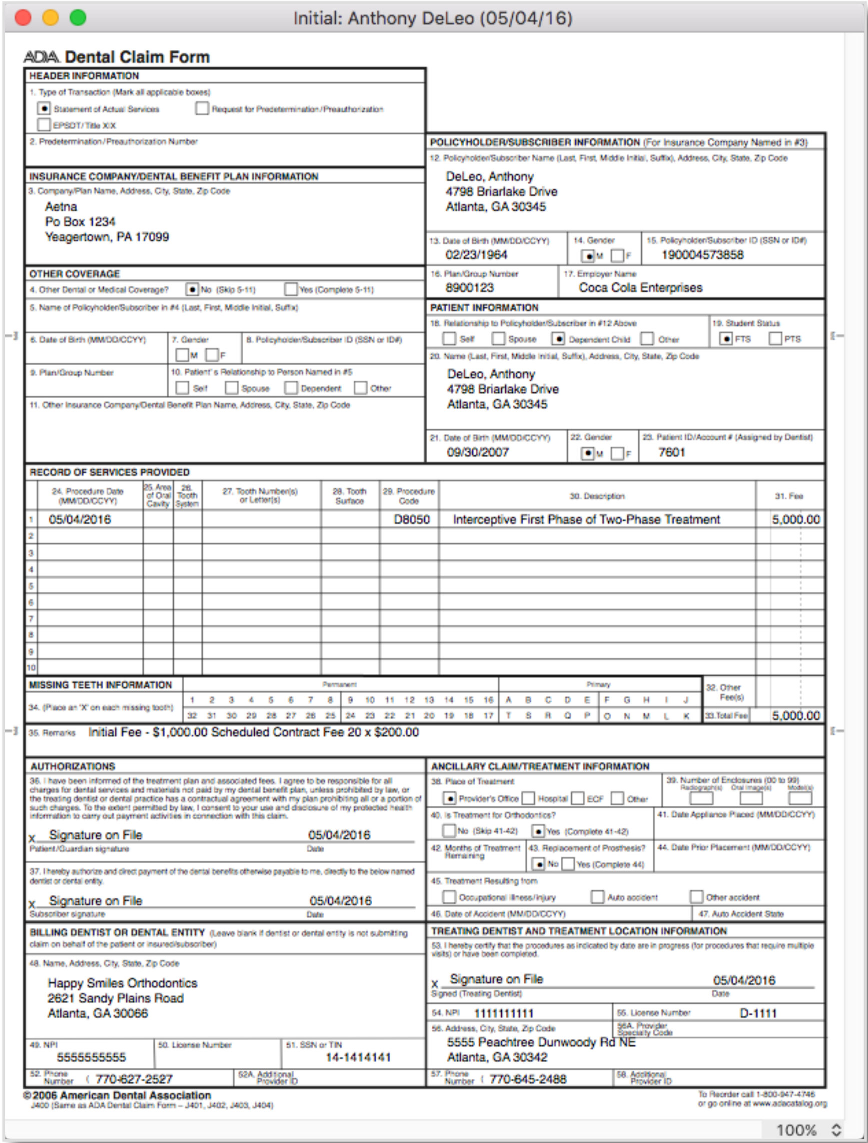


Figure 10-16: *Automatically generated Insurance Claim*

This claim is stored in the Patient Information window under Claims if you need to re-print and to also verify if a claim has either been paid or voided. Hover your mouse over the indicators over the warning in the first column to see missing information. Paper symbol means claims was filed manually, (e) symbol means claim was filed electronically.

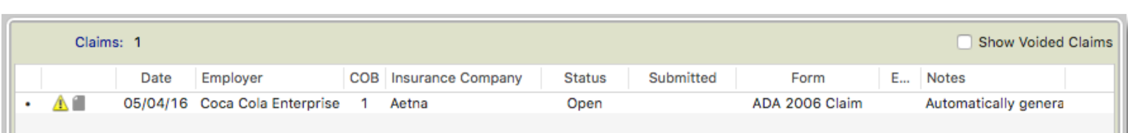


Figure 10-17: *Patient Information - Claims*

Multiple Insurance Policies
There may be times when more than one policyholder is associated with a patient. If this is the case, consider the following:

- Does the patient have more than one account holder?
- Does each account holder have a different insurance policy?
- Are there more than two Policy Holders?

In Lesson Ten, you learned how to create a contract with two account holders. If each account holder has his own insurance, you create two contracts and enter the amount of expected insurance for each.

If there are three or more policy holders you need to identify which policy holders go with each account holder, either 1 or 2.

For Example:

Account 1		**Account 2**	
Insurance 1	1000.00	Insurance 2	1200.00
Insurance 3	500.00	Insurance 4	500.00
Total insurance per contract	1500.00		1700.00

Enter each contract with the expected insurance as the total for each account holder.

10D Filing Claims

When you add Policyholders to a patient's contract, topsOrtho automatically generates an insurance claim (or claims, depending on how many policyholders there are for a patient).

There are times when you may need to generate a claim, separate from what topsOrtho does automatically. For instance, you may need to generate a pre-estimate claim to verify insurance benefits. topsOrtho allows you to generate a manual claim anytime you want.

Creating a Manual Insurance Claim

1. Click Action from the menu bar.
2. Click New Insurance Claim...

Figure 10-18: *Manual Generated Claim*

3. Press Tab.

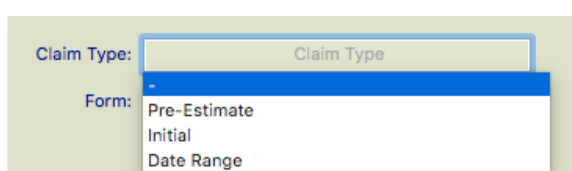


Figure 10-19: *Claim Type*

4. Select the Claim type and press Tab.

5. Select the Form and press Tab.

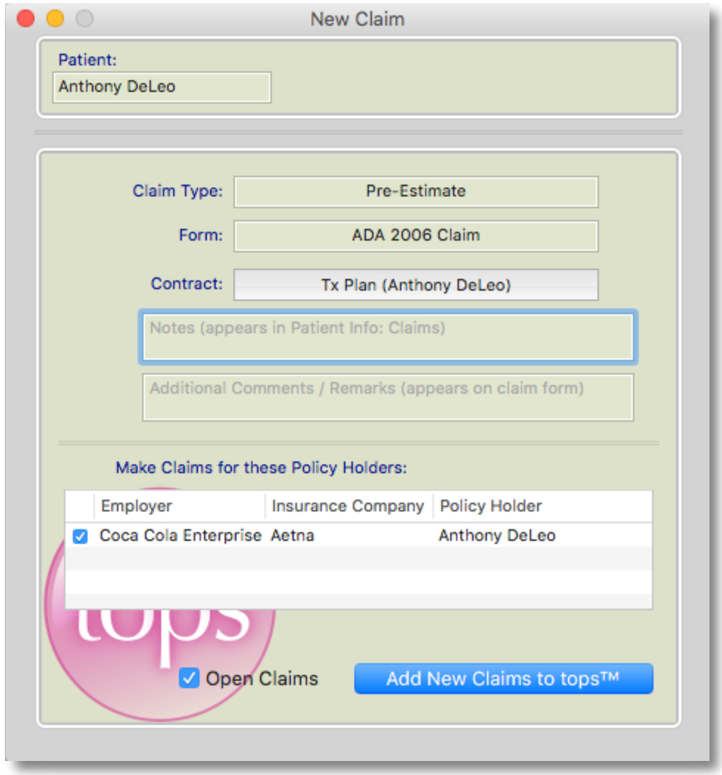


Figure 10-20: *New Claim Form*

6. Click Add New Claims to tops. Four claims will be generated, as there are four insurance policies for this patient.

10E Managing Claims

topsOrtho offers a claims list in which you can manage all insurance claims. This list offers you the flexibility of viewing claims that have been paid, claims that have not been paid, and the past due aging of submitted claims. This list also shows all claims that have been voided.

Viewing the Claims List

1. Click Matrix from the menu bar.
2. Click Claims.

Icons (second column)
Open Diamond = Pre-estimate
Dot = Initial Claim
Blank = Periodic Claim
Icons (due columns)
Dash = Voided or Paid claims

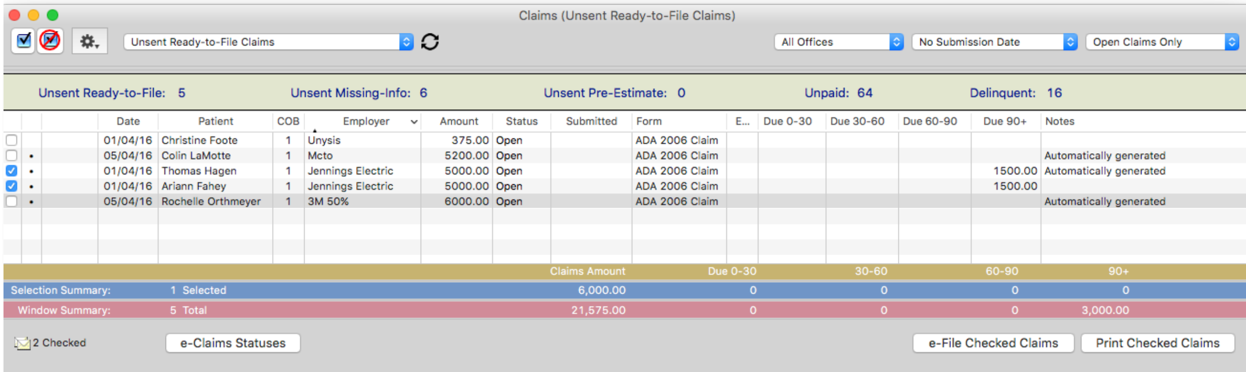
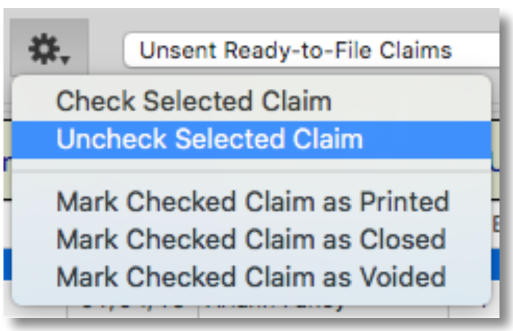
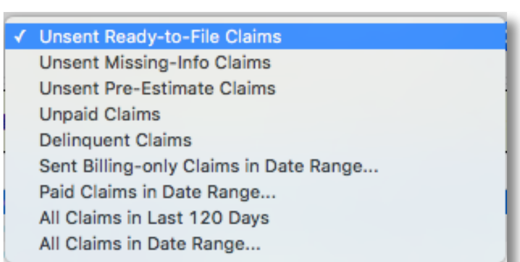


Figure 10-21: *Claims List*

Check All Listed Claims–topsOrtho automatically puts a check mark in the box for a specified action.
Uncheck All Listed Claims–topsOrtho automatically takes off the check marks in the box for a specified action.



Gear icon–Allows you to take action on selected claims.



Claim Filter–Filters claims by the displayed categories.

Summarize the Claims List

You can sort the claims list by Patient, Employer, or any other column. This list displays all claims with your selected filter. For example, you may want to filter the list by Unpaid and sort by Due 90+ to see the claims that are 90 days past due.

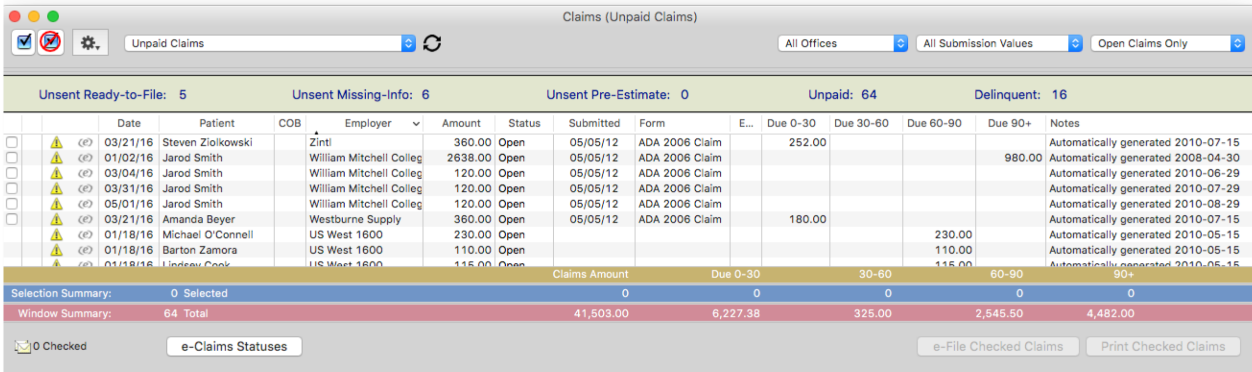


Figure 10-22: *Unpaid Claims List*

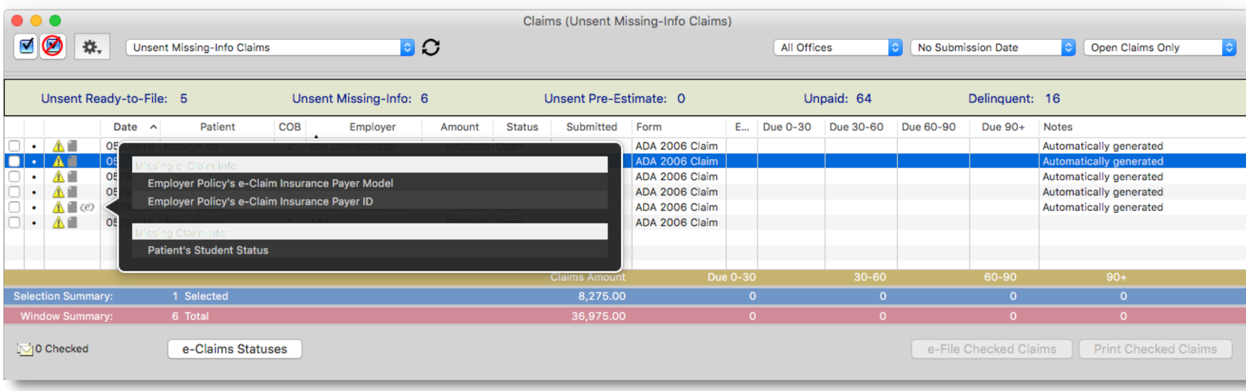


Figure 10-23: *Missing Information*

From the Unsent Missing-Info Claims list, hover your mouse over a claim to view the the popover and the missing information .

Right click a claim to view additional options. From the contextual menu select the appropriate option.

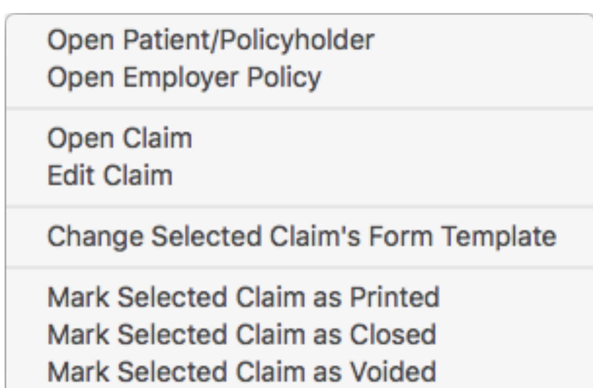
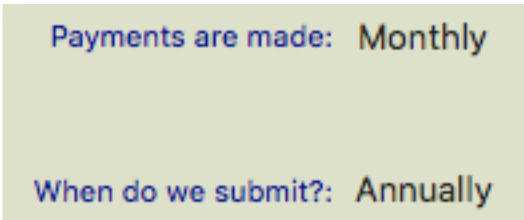
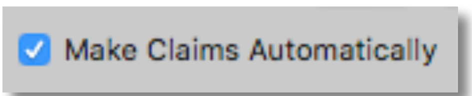


Figure 10-24: *Claim Options*

Payment Reminder Claims
Payment Reminder Claims are insurance claims that are submitted one time only but are tracked monthly. Selection options may look like the example below. Payment Reminder claims cannot be checked for printing as they are generated for posting against insurance payments.



Selection found in Employer Policy Info



Selection found in insurance holder tab of the patient's chart under the employer policy.

Payment Reminder claims are used when applying an insurance payment. Since the payments are made monthly and claims are submitted annually, be sure to apply the insurance payment to the appropriate claim.

Electronically Filing or Printing Claims
If you will file electronically you must complete the necessary paperwork, call us for assistance.
1. Select Unsent Ready-to-File Claims and click to check the claims.
2. Choose e-File Checked Claims. That's it; it's really that easy!
3. If you need to print and mail a claim, first print the envelopes or labels. Select the claims on the list and click the envelope button in the lower left corner. The envelopes or labels will be created and waiting to print on the Labels & Envelopes List.
4. To print a claim, check the claim on the list and select Print Checked Claims.

e-Claims Status Reports
If you e-File claims, the status reports show e-Claims submission statuses and totals for each day. Check these reports daily. Status reports are available 1 business day after a claim is submitted.

To view the status reports
1. From the menu bar, select List and e-Claims Statuses. You can also access the status reports from the Claims List.
2. Click the date to view the status of each submitted claim.
3. Reports are visible for each day claims were processed. View your reports frequently, look for rejected claims, correct errors and resubmit. Daily totals are shown at the bottom of the report.

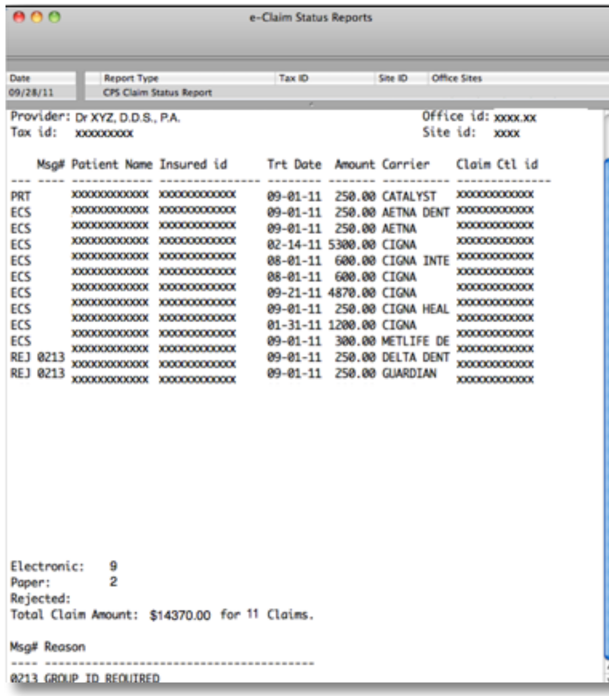


Figure 10-25: *e-Claim Status Reports*

10F Entering Insurance Payments

Each time you receive a payment from an insurance company, you should associate the payment with the appropriate claim. By doing this, the claim is marked as Paid and will no longer appear on the list of unpaid claims. The payment also will be credited to the patient's ledger.

When entering a new transaction, you can select the appropriate claim from a drop-down window. (If you do not have a claim to associate with a payment, select None from the drop-down list.)

The insurance transaction types are: Insurance Payment - Check, Insurance Payment - Credit Card and Insurance Payment - Direct Deposit. The steps below explain how to complete an insurance transaction.

1. From the menu bar, select Action and New Transaction or Command + T to open the transaction window.
2. Chose a transaction type listed above - Insurance Payment - Check, Insurance Payment - Credit Card and Insurance Payment - Direct Deposit.
3. Enter the patient's name and select the Account Holder.

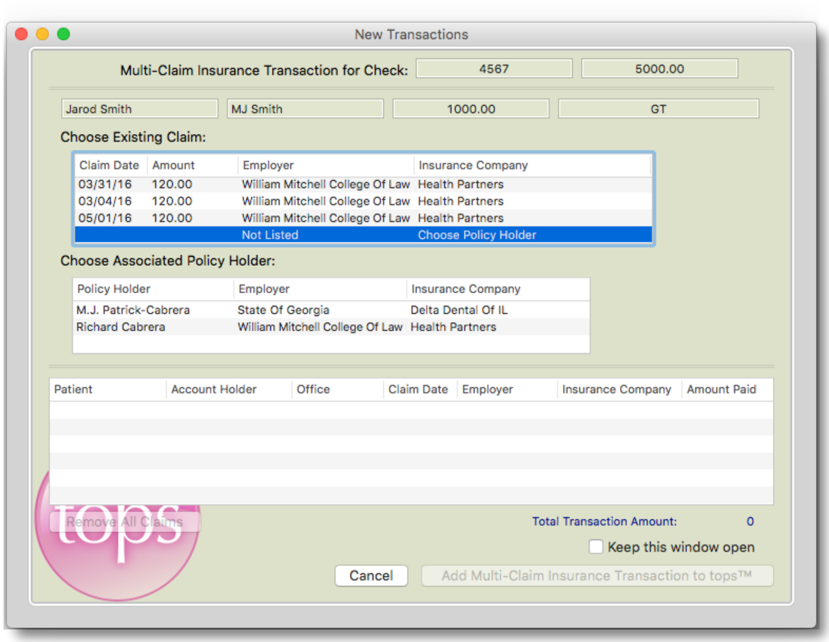
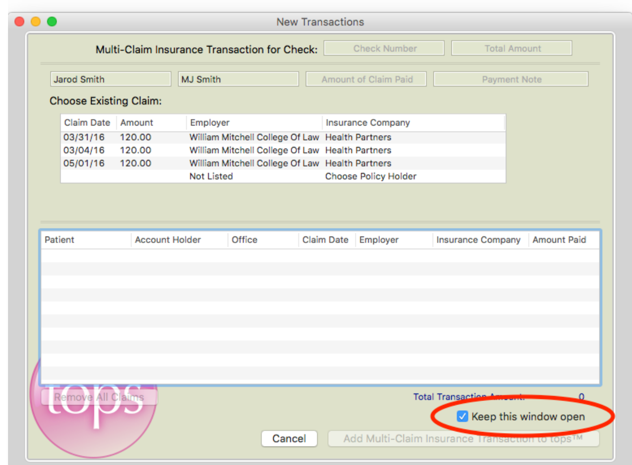


Figure 10-26: *Outstanding Insurance Claim*

4. Tab to the Fee/Payment Type field and select the transaction type (Insurance Payment Check, Credit Card or Direct Deposit).
5. In the next window, enter the Amount.
6. Tab and enter the Check Number, Amount of Claim Paid and Payment Note.
7. Select the corresponding Claim. Press Tab for the transaction to display in the lower part of the window. If the payment is for multiple patients, Tab again to enter other patient(s).
8. Select Add Multi-Claim Insurance Transaction to tops when finished. If you have more transactions, select the Keep this window open checkbox.



On the Deposit Slip, Insurance transactions are listed in the Type column with the appropriate Transaction Type: Insurance Payment – Cash/Check, Insurance Payment – Credit/Debit Card or Insurance Payment – Direct Deposit.

10G Increasing/Decreasing Insurance Benefits

If a patient's benefits increase or decrease, you need to adjust his contract accordingly, so that the co-payment either increases or decreases. Either of these changes can be made by adjusting the Contract Worksheet in the Patient Information window.

Increasing Insurance to an Existing Contract with Insurance

1. Open the Patient.
2. Click on Contracts/Ledger/Auto-Pay tab.
3. Open the active contract.

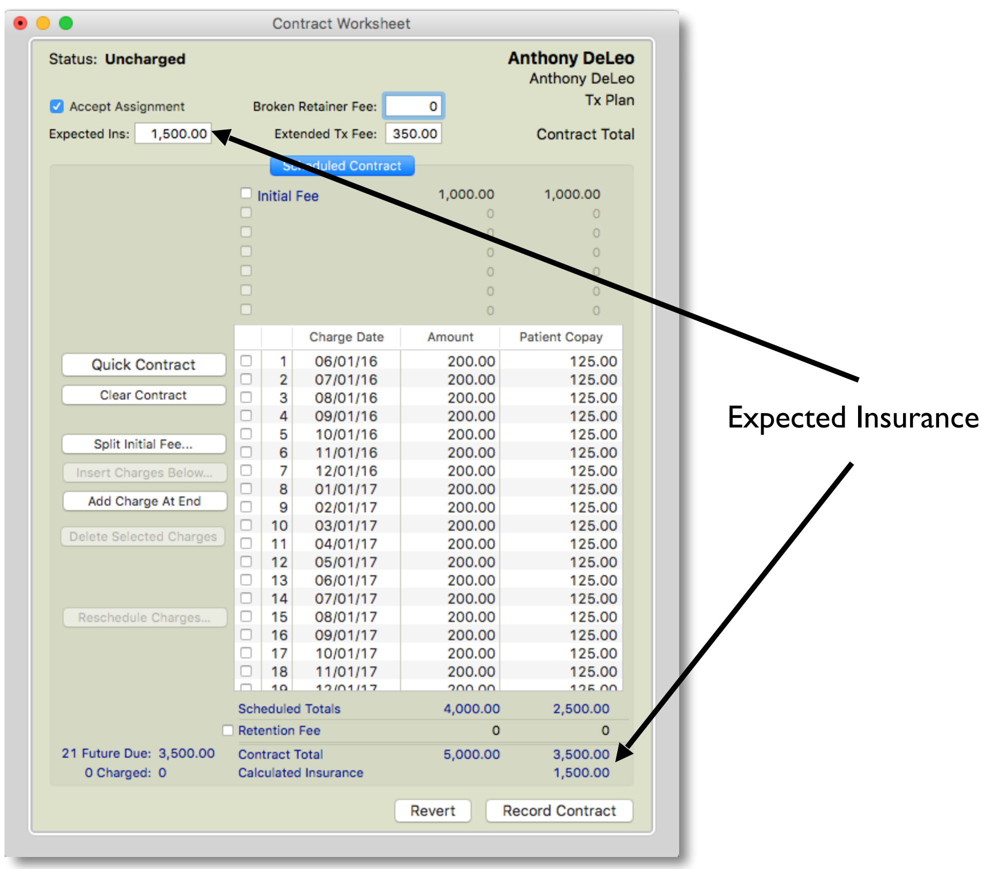
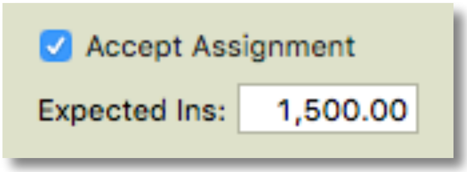


Figure 10-27: *Contract Worksheet*

In the upper left corner, the Expected Insurance indicates $1,500.00. The lower right corner also indicates $1,500.00 of Expected Insurance.

You will only modify the dollar amounts in the Patient Co-Pay column. **Never modify the dollar amounts in the left (Amount) column.** topsOrtho automatically figures out that the money deducted from the co-pay column will be added to the insurance column.

In this example, the insurance benefit was increased $200.00, to $1,700.00.

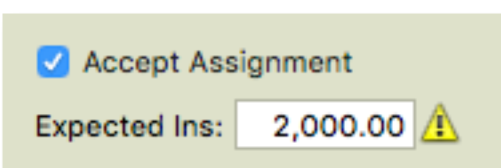


4. With $200.00 of additional benefits, we divide by 20 monthly charges. This decreases the Patient Co-Pay amount by $10.00 each month.
5. Double-click on the first charge.

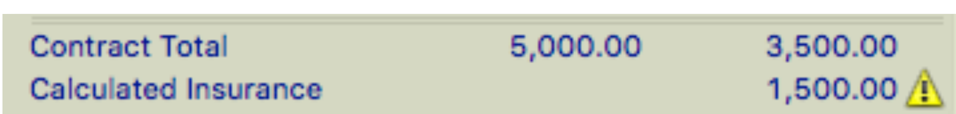
		Charge Date	Amount	Patient Copay
☐	1	06/01/16	200.00	125.00
☐	2	07/01/16	200.00	125.00
☐	3	08/01/16	200.00	125.00
☐	4	09/01/16	200.00	125.00
☐	5	10/01/16	200.00	125.00
☐	6	11/01/16	200.00	125.00

Figure 10-28: *Selected charge*

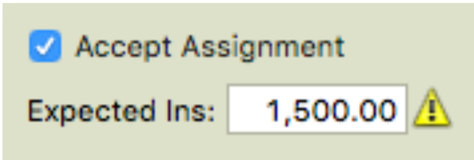
6. Enter 115.00. Immediately, you'll see that the Expected Insurance amounts do not match. You have just decreased the patient co-pay by $10.00. Continue to change the dates until the Calculated Insurance reaches the new benefit amount of $1,700.00.



Do not change the dollar value in the Expected Insurance!!

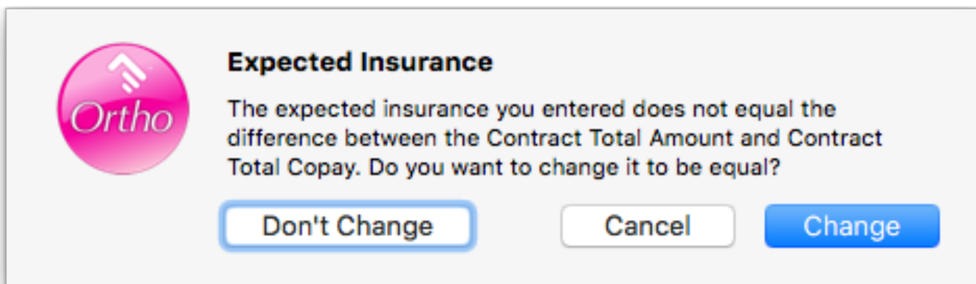


7. Double-click on each amount to decrease by $10.00. When you are finished you should have an Expected Ins of 1500.00 and a Calculated Insurance of 1700.00. These amounts do not match. The Warning sign lets you know that the insurance benefit has changed.

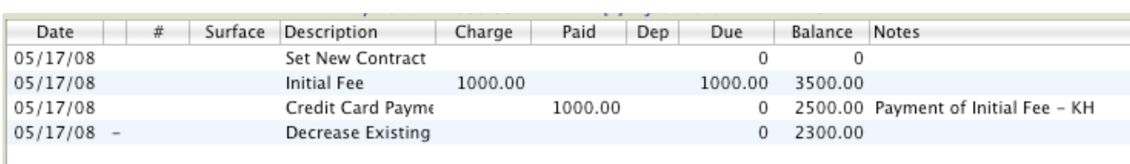


Verify that the Contract Total **has not changed**. Only the patient co-pay portion should have changed.

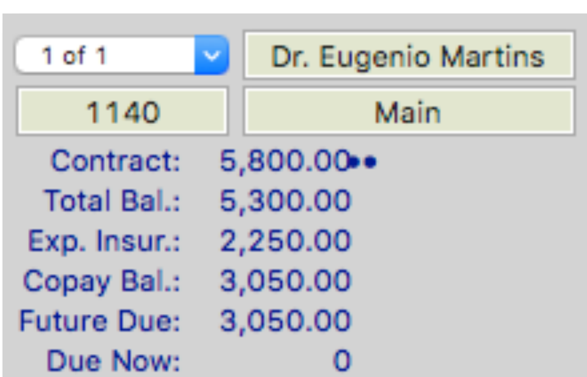
8. Click Record New Contract. A warning will appear.



9. Click Change.
10. Enter your password. The contract has been changed. You will see this entry in the patient's ledger.



Date		#	Surface	Description	Charge	Paid	Dep	Due	Balance	Notes
05/17/08				Set New Contract				0	0	
05/17/08				Initial Fee	1000.00			1000.00	3500.00	
05/17/08				Credit Card Payme		1000.00		0	2500.00	Payment of Initial Fee - KH
05/17/08	-			Decrease Existing				0	2300.00	



Decreasing Insurance from an Existing Contract
Removing insurance from a patient's ledger is essentially the same process as adding insurance. Instead of decreasing the patient's co-pay charge, however, you increase it.

For example: A patient has $1000.00 in expected insurance benefits. The insurance company has paid out $300.00 of the benefit and has decreased the total benefit to be $500.00. Since they have paid out $300.00 already, there is a remaining balance of $200.00, not the original $700.00.

Original Expected Benefit	$1000.00
Paid Out	300.00
Original Benefit Balance	$700.00
Decrease in Total Benefit	500.00
New Remaining Balance	**$200.00**

The **patient's copay** will need to be increased by $500.00.Divide the remaining benefit by the number of charges left on the patient's contract. Change the charge to reflect this increase.The decrease in benefit of $500.00 must be removed from the contract.

		Charge Date	Amount	Patient Copay
☑	1	08/13/07	120.00	114.00
☑	2	09/18/07	120.00	114.00
☑	3	10/14/07	120.00	114.00
☑	4	11/12/07	120.00	114.00
☑	5	12/17/07	120.00	114.00
☑	6	01/14/08	120.00	114.00
☑	7	02/16/08	120.00	114.00
☑	8	03/14/08	120.00	114.00
☑	9	04/17/08	120.00	114.00
☐	10	05/15/08	120.00	114.00
☐	11	06/16/08	120.00	114.00
☐	12	07/14/08	120.00	114.00
☐	13	08/12/08	120.00	114.00
☐	14	09/17/08	120.00	114.00
☐	15	10/13/08	120.00	114.00
☐	16	11/12/08	120.00	114.00
☐	17	12/16/08	120.00	114.00
Scheduled Totals			2400.00	1958.00
Retention Fee				
Contract Total			3958.00	2958.00
Calculated Insurance				1000.00

☑ Accept Assignment
Expected Ins: 1000.00

		Charge Date	Amount	Patient Copay
☑	2	09/18/07	120.00	114.00
☑	3	10/14/07	120.00	114.00
☑	4	11/12/07	120.00	114.00
☑	5	12/17/07	120.00	114.00
☑	6	01/14/08	120.00	114.00
☑	7	02/16/08	120.00	114.00
☑	8	03/14/08	120.00	114.00
☑	9	04/17/08	120.00	114.00
☐	10	05/15/08	120.00	170.00
☐	11	06/16/08	120.00	170.00
☐	12	07/14/08	120.00	170.00
☐	13	08/12/08	120.00	170.00
☐	14	09/17/08	120.00	170.00
☐	15	10/13/08	120.00	170.00
☐	16	11/12/08	120.00	170.00
☐	17	12/16/08	120.00	170.00
☐	18	01/13/09	120.00	72.00
Scheduled Totals			2400.00	2458.00
Retention Fee				
Contract Total			3958.00	3458.00
Calculated Insurance				500.00

Record the contract and change to make the Expected Insurance and the Calculated Insurance equal. The new expected insurance will change on the patients ledger.

Patient Receives Insurance After Contract is Activated

If a patient receives insurance benefits after the contracts is activated you must deactivate the original contract and enter a new one. The below steps describe how to perform this function, but it is highly suggested to contact topsOrtho customer support for assistance.

1. Open Patient Information.
2. Click Action from the menu bar.
3. Click New Transaction.
4. Choose Deactivate Contract for fee/procedure type, press Tab.
5. Enter your password. The amount will automatically fill in.
6. Click Add Transaction to tops. The remaining contract total will move to the “Due Now” section of the patient’s financial information.
7. Click Action from the menu bar.
8. Click New Transaction.
9. Choose the (-) Account Adjustment for the fee/procedure type.
10. Enter your password.
11. Select the type of (-) Adjustment you require.
12. Click Use Selected Adjustment Type.
13. Fill in the amount listed in the Due Now to bring the Due Now to zero.
14. Click Add Transaction to tops.

Now you must:

1. Enter a New Treatment Plan.
2. Make the New Treatment Plan active.
3. Enter new contract with insurance.
4. Charge initial fee on new contract to activate.

Summary

In this lesson, you should feel confident with:

- Entering insurance information
- Entering policy information
- Creating contracts with insurance
- Filing and managing claims
- Entering insurance payments
- Increasing and decreasing insurance benefits

Lesson 11 Contract Option Variables

Lesson Eleven Overview

This lesson focuses on the options available in topsOrtho for modifying an existing contract. We will discuss how to reschedule payments, change the monthly payment amount, change due dates, increase/decrease insurance, and deactivate and enter a new contract.

Objectives:

To become familiar with the contract options, you will:

11A Reschedule Charges
If a patient gets behind on payments, you may want to offer the option of rescheduling past charges.

11B Adjust Monthly Payments
If you need to readjust the amount of charges on a contract you can change the monthly charge amount.

11C Change the Charge Dates
You can change the charge dates of a patient's monthly charge.

11D Deactivate/Entering New Contracts
There will be times that you must deactivate a contract and create a new one for your patient.

11A Rescheduling Charges

If a patient falls behind on his payments, your Accounts Receivable report reflects these past due amounts. Sometimes a practice may opt to reschedule these charges to help the patient “catch up.” **You can only reschedule charges that have already been charged to the patient’s ledger.**

Rescheduling Charges

1. Open the Patient’s Information.
2. Click on Contract/Ledger/Auto-Pay tab.

Figure 11-1: *Patient’s Ledger*

You can see in the above example that the patient was current on 02/15/08. The patient has called your office and explained why he’s fallen behind. You decide to reschedule three of his payments to the end of his contract.

3. Double-click on the Patient’s contract to open the Contract Worksheet.

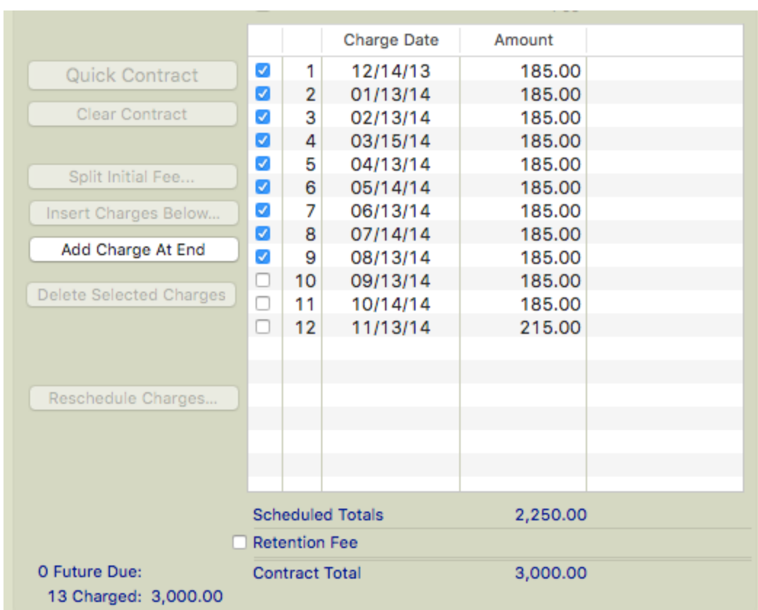


Figure 11-2: *Patient’s Contract Worksheet*

4. Drag the mouse over the three charges that you will reschedule.

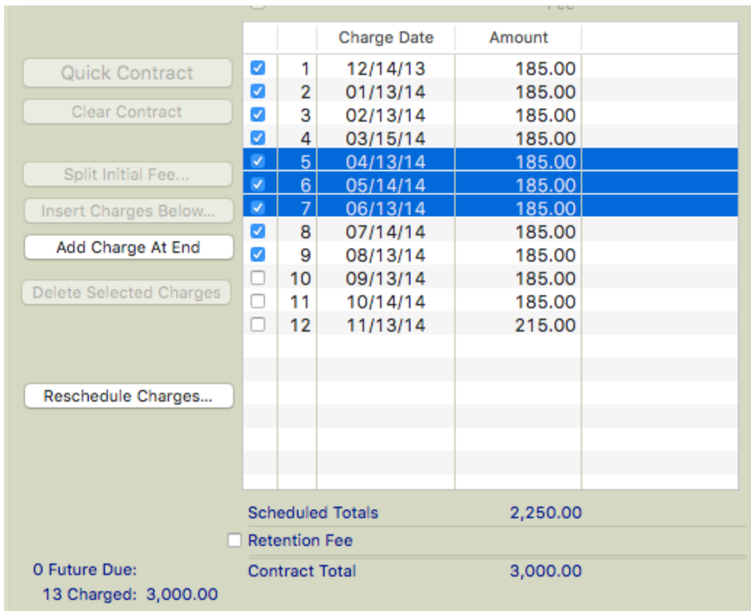


Figure 11-3: *Selected Charges*

5. Click the Reschedule Charges... button.

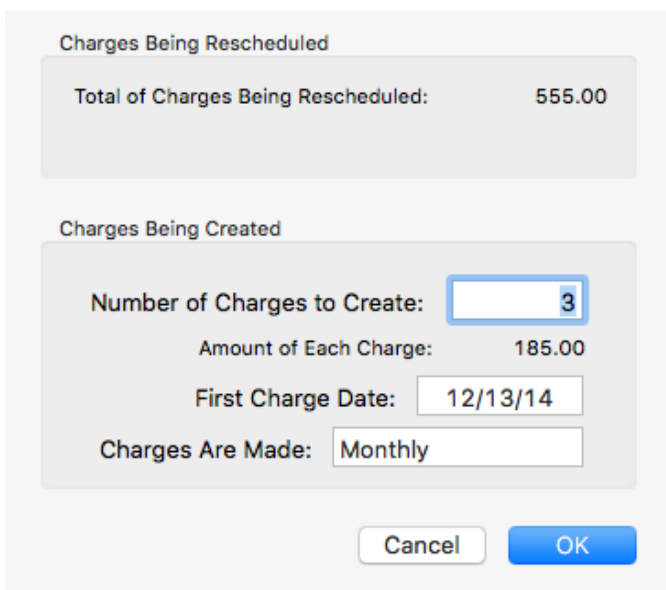


Figure 11-4: *Charges Being Rescheduled*

6. Verify the correct information and click OK.

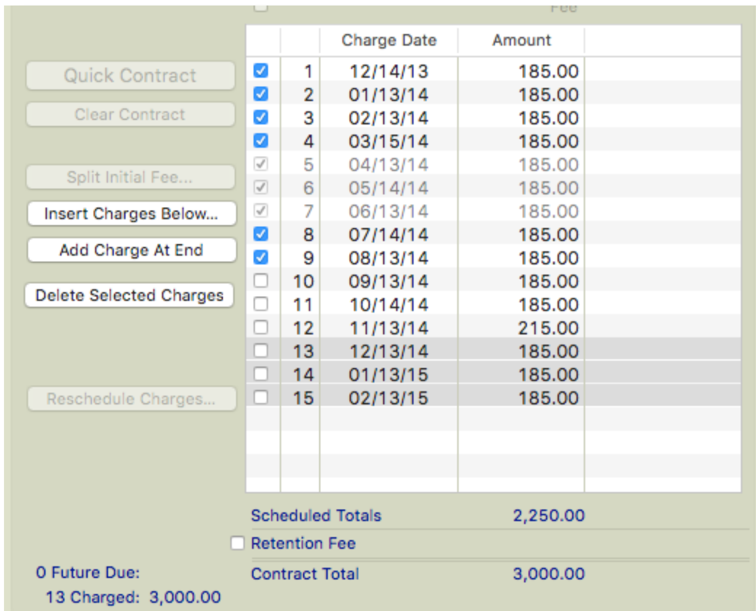


Figure 11-5: *Rescheduled Charges*

The three charges are grayed out and have been added to the end of the contract.

7. Click Record Contract. The Due Now reflects the changes in the patient’s ledger.

11B Changing Monthly Charges

Once you record a contract, you can always go back into the Contract Worksheet and change the monthly charge. One note of caution: be sure to **always** verify that the contract total was not changed, but only the monthly charges. You may want to do this if a patient would like to pay more at the end of the year, for example, because of a flex spending plan.

Changing the Monthly Charges

1. Open the Patient Information window.
2. Click on Contract/Ledger/Auto-Pay tab.
3. Double-click on the active contract to open.

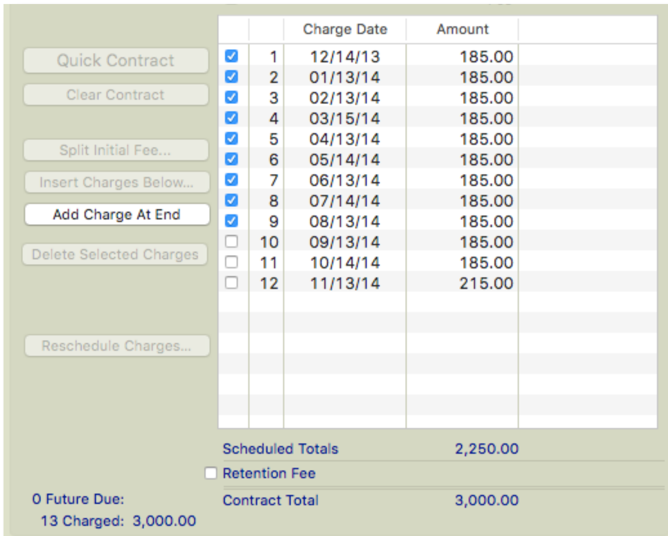


Figure 11-6: *Contract Worksheet*

4. Double-click on the charge that you would like to change. The Contract Total is at the bottom on the worksheet.

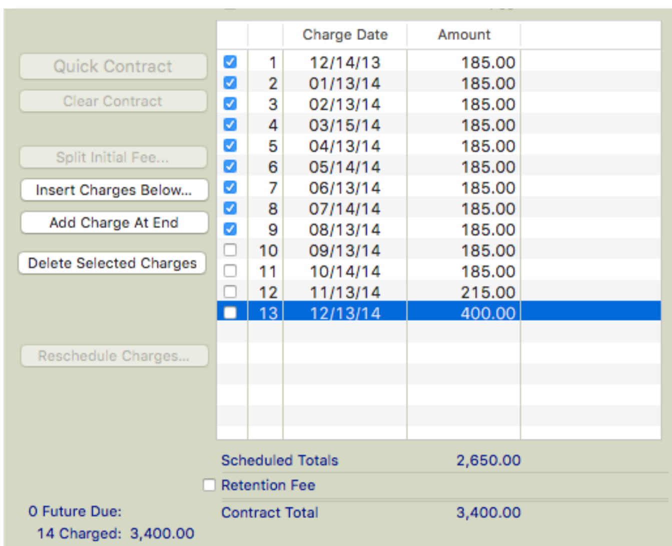


Figure 11-7: *Modified Charges*

5. Type in the amount you would like to change to.
6. Change other charges to made the total of the contract stay the same.

For Example: 09/05/12 change to $0
11/05/12 change to $400.00

The contract total still remains at $3,000.00

7. Click Record Contract.

11C Changing Charge Dates

You and your patient can decide to change the charge dates on a contract. The process is the same as changing the monthly payments–with the exception of clicking on the date.

Changing a Charge Date

1. Open the Patient Information window.
2. Click on Contract/Ledger/Auto-Pay tab.
3. Open the active contract.
4. Double-click on the charge date that you would like to change.

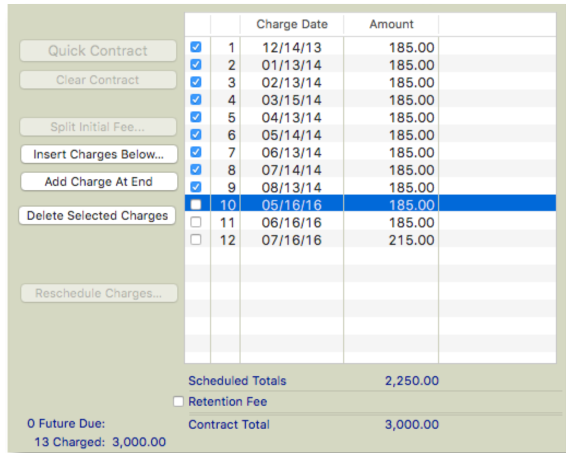


Figure 11-8: *Contract Worksheet*

5. Type in the date you would like to change to.

For Example: 09/13/14 change to 05/16/16
12/01/16 change to 11/01/16
01/01/16 change to 12/01/17
02/01/17 change to 01/15/17

The contract total still remains at $5,000.00

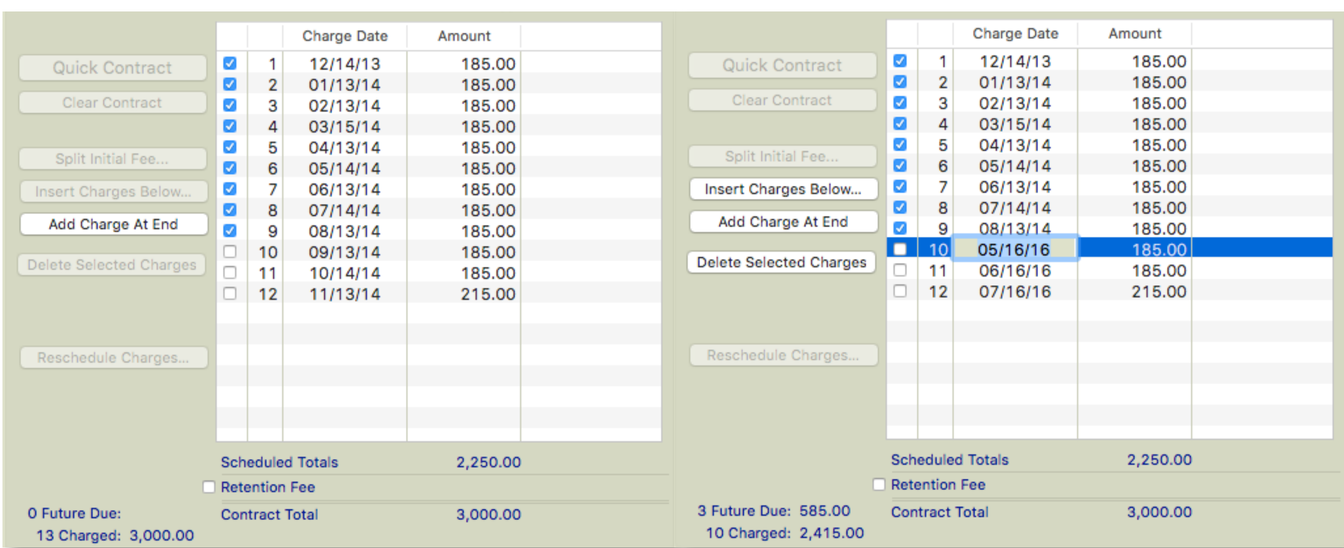


Figure 11-9: *Due Dates changed*

6. Click Record Contract. The charge dates have been modified.

11D Deactivating/Entering New Contract

As you learned in Lesson 11, you may sometimes need to deactivate an existing contract and enter a new one. The steps below describe this process. *However, we strongly recommend that you contact topsOrtho customer support for assistance.*

Deactivating and Entering a New Contract

1. Open Patient Information.
2. Click Action from the menu bar.
3. Click New Transaction.
4. Choose Deactivate Contract for fee/procedure type, press Tab.
5. Enter your password. The amount will automatically fill in.
6. Click Add Transaction to tops. The remaining contract total will move to the "Due Now" section of the patient's financial information.
7. Click Action from the menu bar.
8. Click New Transaction.
9. Choose the [-] Account Adjustment for the fee/procedure type.
10. Enter your password.
11. Select the type of [-] Adjustment you require.
12. Click Use Selected Adjustment Type.
13. Fill in the amount listed in the Due Now to bring the Due Now to zero.
14. Click Add Transaction.

Now you must:

1. Enter a New Treatment Plan.
2. Make the New Treatment Plan active.
3. Enter new contract with insurance.
4. Charge initial fee on new contract to activate.

Summary

In this lesson, you should feel confident with:

- Rescheduling charges
- Changing monthly charges
- Changing a contract's due dates
- Deactivating/entering new contracts

Lesson 12 Entering Existing Financials

Lesson Twelve Overview

This lesson focuses on entering existing financials into topsOrtho, and the information you'll need to enter an existing contract.

Objectives:

To become familiar with entering existing financials, you will:

12A Learn what items are required
Entering existing financials into topsOrtho will require specific information from you. Each item will be discussed.

12B Work with the Data Conversion Worksheet
topsOrtho provides a data conversion worksheet that will help as you enter existing contracts.

12A Items Required for Entering Existing Contracts

In order to enter existing contracts into topsOrtho, you'll need some information from your files and previous system. Gathering this information before you begin will make the process much easier.

Have on hand:

1. Paper copy of the patient's contract that includes:
   a. total contract amount
   b. monthly payment or number of payments
   c. initial fee
   d. expected insurance (if applicable)

2. Patient's current ledger that includes:
   a. first monthly charge date (not the initial fee date)
   b. patient balance
   c. insurance balance

3. Amount of patient's current payoff:
   a. total amount owed by both the patient and the insurance company

When entering existing contracts into topsOrtho, remember that topsOrtho is a calculator and is **always correct**. If any number entered from an existing contract does not come out correctly, there's a mistake in the math. Go back, recalculate your figures, and enter them into topsOrtho again.

Enter Existing Contract

Example:

Total Contract Amount	$4800.00
Monthly Payment	$ 200.00 for 13 months
Initial Fee	$1200.00
Expected Insurance	$1000.00
First Charge Date	05/01/18
Patient's Current Balance	$1200.00
Insurance Current Balance	$ 200.00
Total Balance:	$1400.00
Due Now:	$0

1. Create your contract as you normally would, using Quick Contract.
2. The First Charge date would be the patient's first charge date.

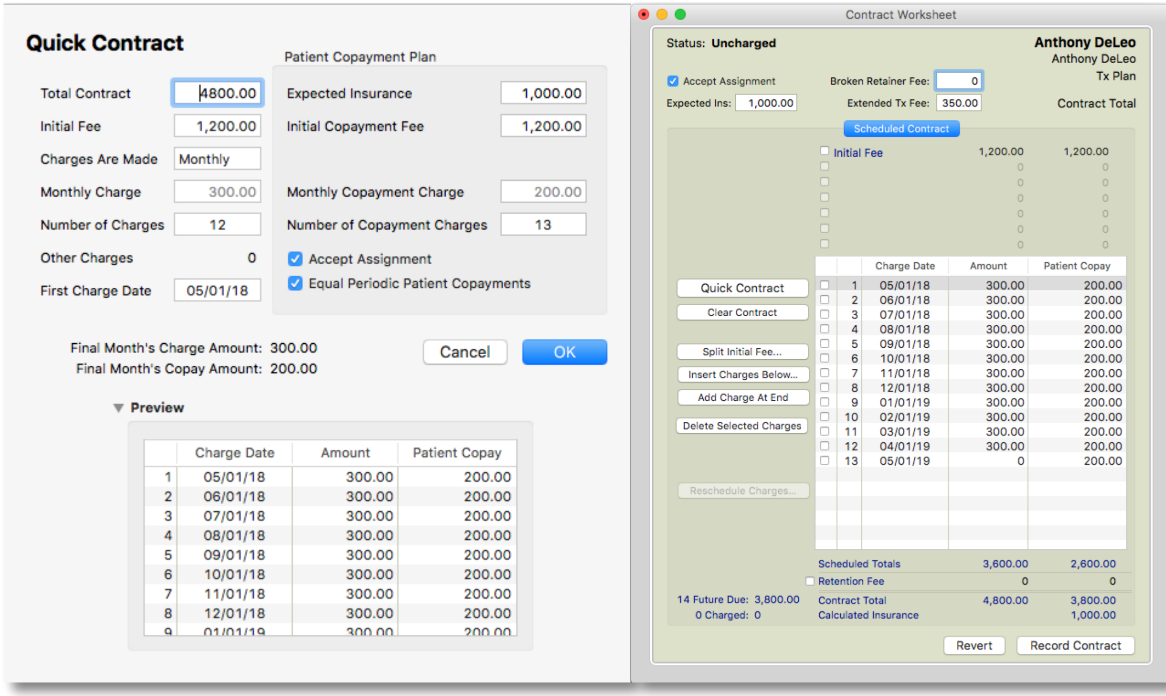


Figure 12-1: *Contract Entries*

3. Click Record Contract.
4. Enter your password.

12B Data Conversion Worksheet

The data conversion worksheet is used only to enter existing contracts. This worksheet will appear once you have entered a past date and clicked Record Contract.

1. The Data Conversion worksheet appears.

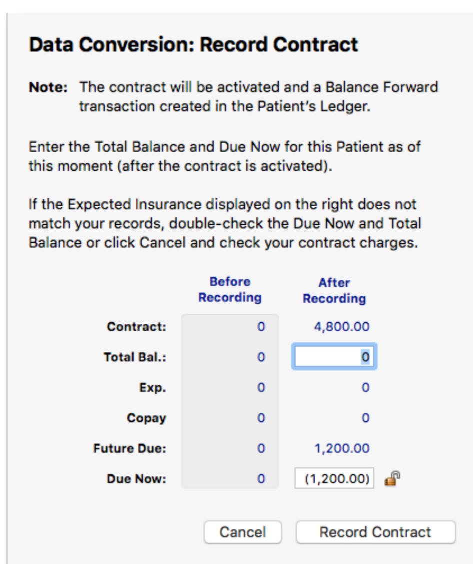


Figure 12-2: *Data Conversion Worksheet*

You will make only two entries on this worksheet. The first is the total balance due. This is equal to the total patient portion plus the total insurance portion (if applicable) that remains on the contract.

The next number is the Due Now. If the patient is current on his payments, the Due Now is zero. If there is an amount due from the patient, enter it here. If there is a credit amount due to the patient, enter it.

topsOrtho automatically calculates the payments that have been made, as well as any remaining insurance. This comes from the numbers you entered on the Quick Contract and the Data Conversion worksheet.

2. Enter 1400.00 in the Total Balance field
3. Enter 0 in the Due Now field.
4. The Exp Insurance field shows 200.00 left, which is the correct amount.
5. The Copay Balance shows 1200.00, which is the correct amount.
6. The Future Due shows 1200.00, which is the correct amount.

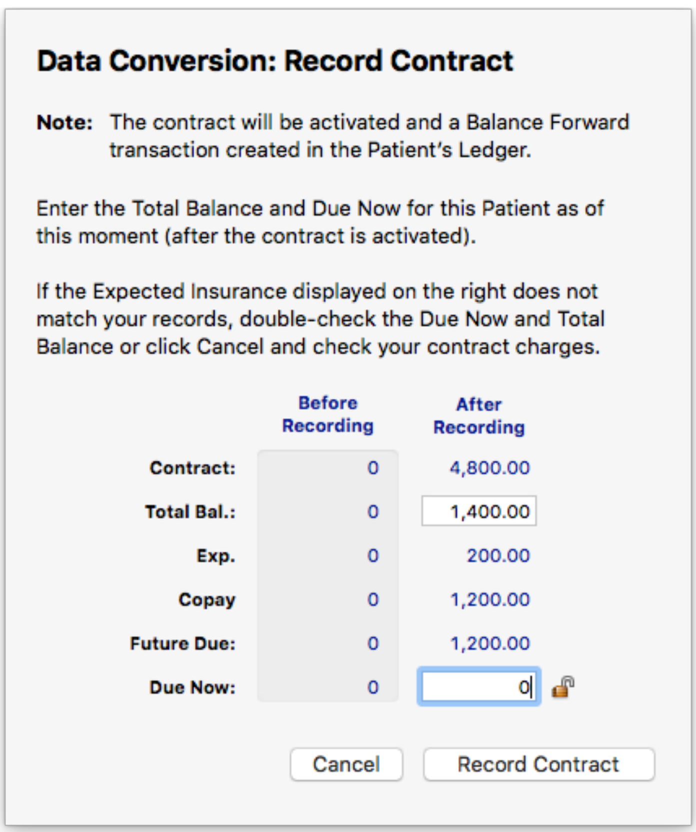


Figure 12-3: *Filled in Data Conversion Worksheet*

7. Once you verify everything, click Record Contract.
8. Enter your password.

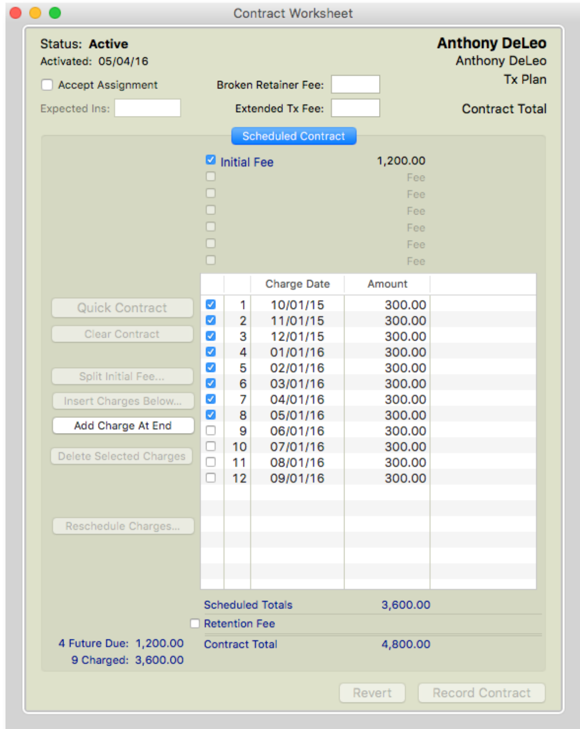


Figure 12-4: *Completed Contract*

The contract is activated and the appropriate number of charges have been checked off. A balance forward ledger entry will appear on the patient's ledger.

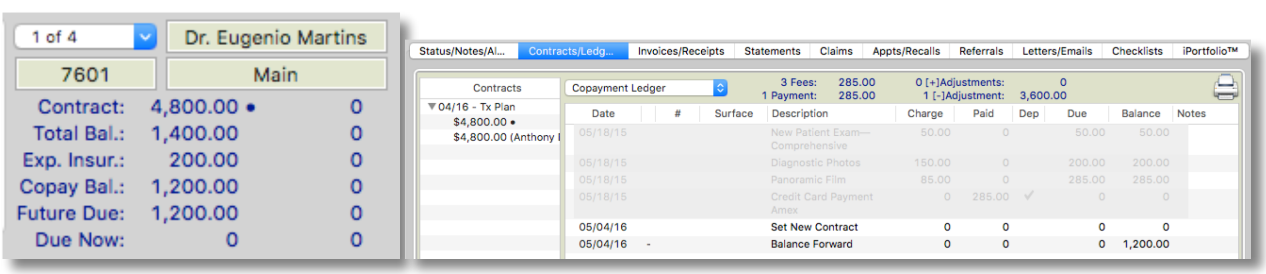


Figure 12-5: *Ledger Entry*

You will want to add a note to the ledger explaining the balance forward entry.

Adding a Ledger Note:

1. Click Action from the menu bar.
2. Click New Transaction.
3. Select Ledger Note for the fee/payment type.
4. Press Tab enough times to enter an appropriate note to the ledger.

If the figures do not calculate correctly on the Data Conversion Worksheet no matter how you enter them, call topsOrtho Customer Support for assistance! Do not enter an incorrect contract.

Summary

In this lesson, you should feel confident with:

- Entering existing contracts into topsOrtho.

Lesson 13 Introduction to the Action, View and Utilities Menus

Lesson Thirteen Overview

This lesson focuses on introducing the functionality of the View and Action Menu bar options.

Objectives:

To become familiar with the view and action menus, you will:

13A Introduction to the functionality of the Action Menu options
Discuss each.

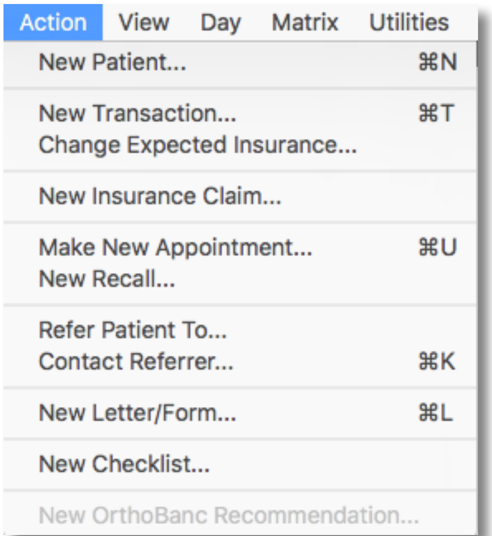
13B Introduction to the functionality of the View Menu options
Discuss each.

13C Introduction to the functionality of the Utilities Menu options
Discuss each.

13A Action Menu options

The Action Menu bar displays items that require you to perform some type of action. You've used many of these already, so we'll concentrate on the others.

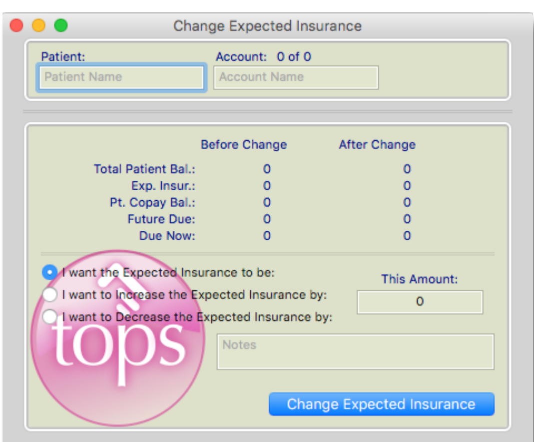
Action Menu



New Patient - Create a new patient
New Transaction - Create a new transaction
Change Expected Insurance - Adjust the insurance for a patient
New Insurance Claim - Create a new claim for a patient
New Recall - Add a patient to the Recall list
Refer Patient To - Refer a patient to a specific doctor or to add a new doctor to the Referral list
Contact Referral - Add a new contact
New Letter/Form - Create new letter/ form
New Checklist - Create a new checklist
New OrthoBanc Recommendation - Returns a credit score for you to setup the contract deposit

Figure 13-1: *Action Menu*

Change Expected Insurance...
Use this feature to make quick changes to what the insurance company is paying for a patient. This can be used when the benefit has changed. If a patient loses insurance benefits completely, by making changes in this window, all insurance money is **due now** by the patient. To avoid this, you may want to alter the contract instead of using this feature.



Once you select an option button, and fill in the amount, this will be reflected in the After Change column located on the right. Don't forget if the benefit is decreased, the amount of the decrease will appear in the Due Now portion of the contract.

Figure 13-2: *Change Expected Insurance*

New Insurance Claim…

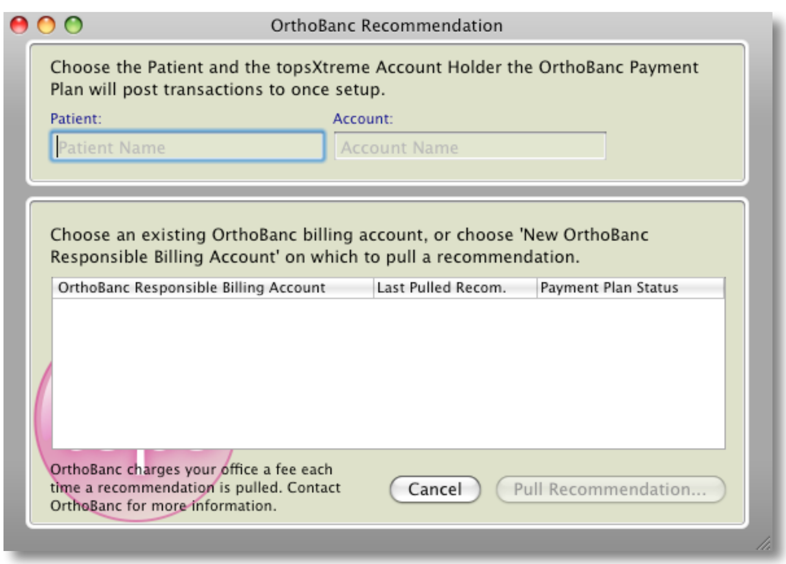
Click on this option to manually create a claim for a patient. You'll be able to select the type of claim you're generating:

- Pre-estimate
- Initial
- Date Range

Once you add the new claim to topsOrtho, you can print immediately or print later. Remember, claims are stored in the Patient Information window and can also be viewed from the Matrix menu.

Figure 13-3: *New Claim*

New OrthoBanc Recommendation…



If you have an account with Orthobanc you can check their recommendation for the patient and account holder.

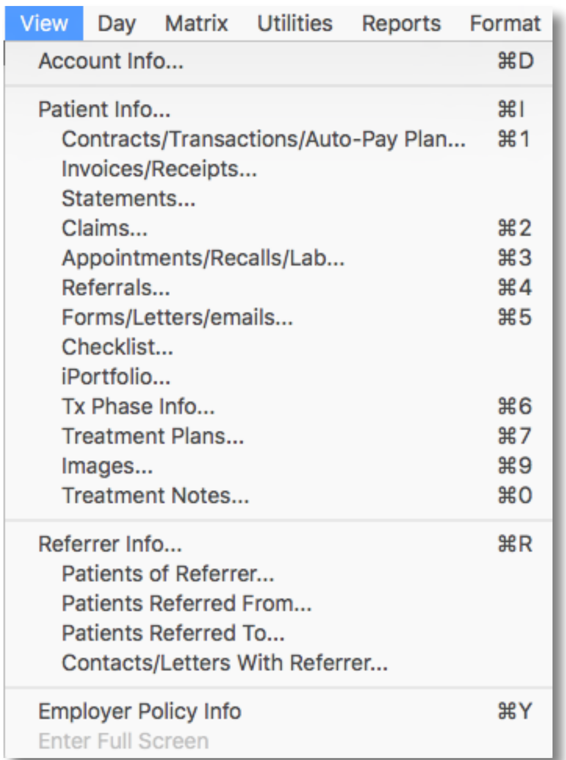
Remember, OrthoBanc charges a fee each time a recommendation is pulled. Contact OrthoBanc for more information

Figure 13-4: *OrthoBanc Recommendation*

13B View Menu options

The View Menu bar option allows you to see account holder information, patient information, referrer information and employer policy information. Notice the keyboard shortcuts at the right of the window, which can be used to perform each function.

View Menu



Account Info - Opens patient's account holder
Patient Info - Opens a patient's chart to the areas shown. Notice keyboard shortcuts
Referrer Info - Opens or adds a referrer
Employer Policy Info - Opens or adds an employer

Figure 13-5: *View Menu*

Account Information allows you to search for a patient's account holder. It can be used if you receive a check with a different last name than the patient's.

Patient Information will allow you to search for a specific patient depending on what part of the patient information screen you would like to view.

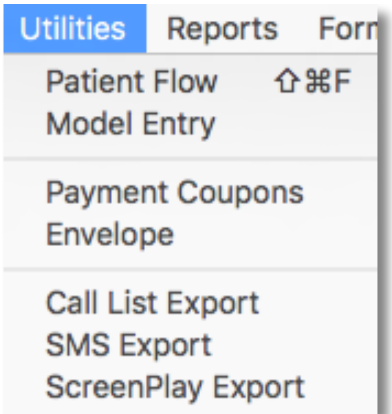
Referrer Information will allow you to add or edit referrer information. You can also open specific referrer information by selecting the sub group.

Employer Policy Information will allow you to add or edit employer policy information.

13C Utilities Menu options

The Utilities Menu displays various utility option in topsOrtho.

Utilities Menu



Patient Flow - Access Patient Flow
Model Entry - Enter model numbers
**Payment Coupons - ** Print payment coupons for selected patient
Envelope - Address and print envelope
Call List Export -Create call list export for Housecalls from Televox
SMS Export - Create file to export to SMS texting appointment reminder providers
Screenplay Export - Integration with ScreenPlay

Figure 13-6: *Utilities Menu*

Patient Flow - Click on this option to open Patient Flow or use the shortcut Command + Shift + F.

Figure 13-7 *Patient Flow*

Model Entry - Click on this option to enter model number, which are displayed in Patient Information, Clinical, Case Info are.

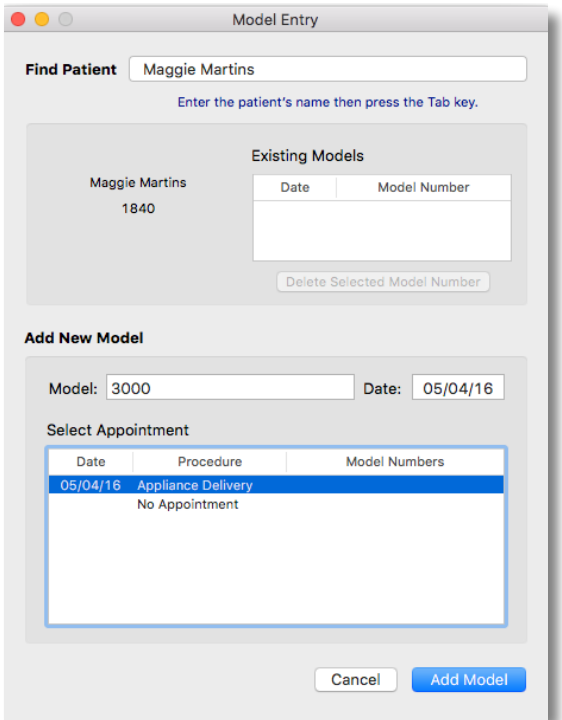


Figure 13-8: *Model Numbers*

Payment Coupons - Click on this option to print payment coupons for a patient.

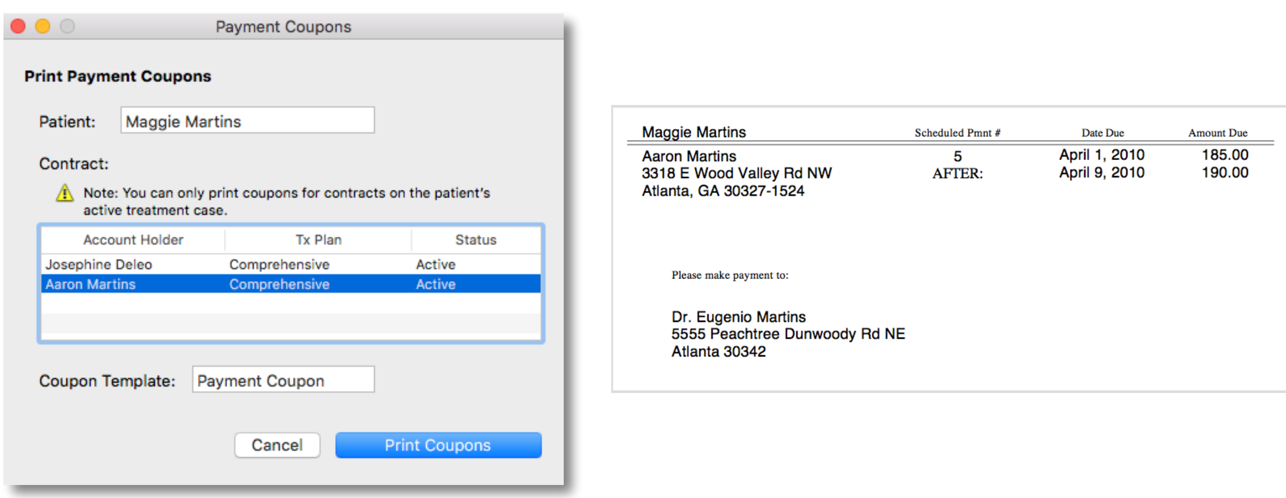


Figure 13-9: *Payment Coupons*

Envelope - Click on this option to print a single envelope, enter return address and enter or look up mailing address.

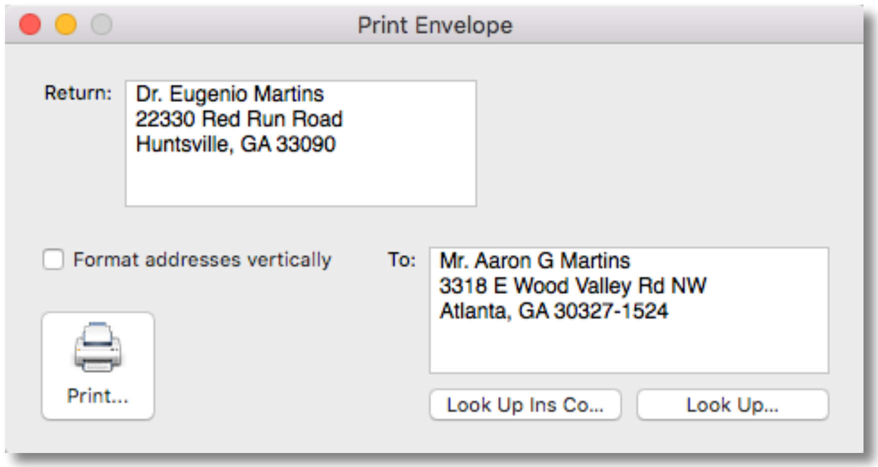


Figure 13-10: *Envelopes*

Call List Export - Click on this option to create a call list to export to Televox. This option is only used if you are using Housecalls. If you use a company who we directly integrate with the information will be pulled automatically. Select Date or Range, Office, and Doctor.

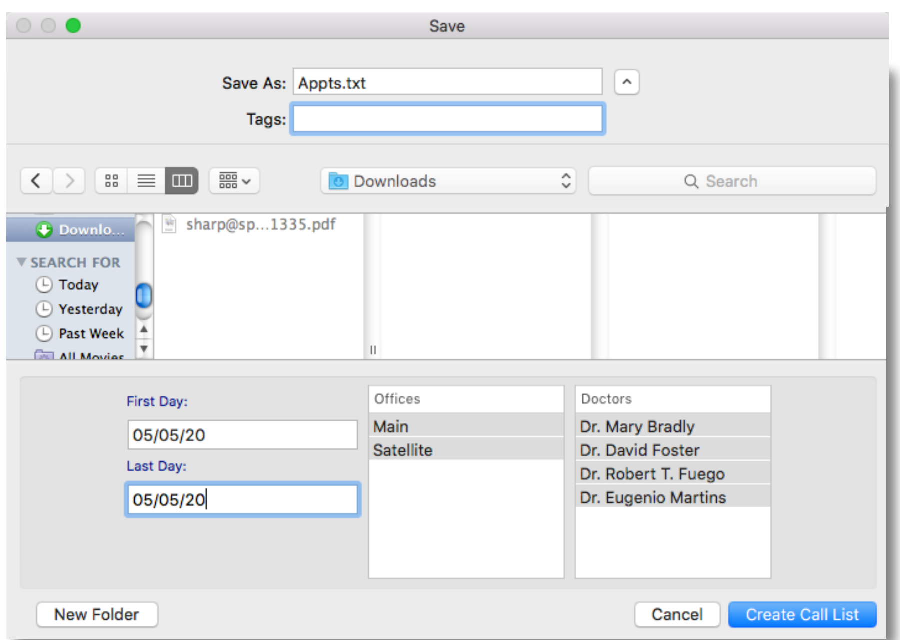


Figure 13-11: *Call List Export*

SMS Export Click on this option to create a list to export to your SMS text appointment reminder provider. Select Date or Range, Office, and Doctor. A .csv file will be created.

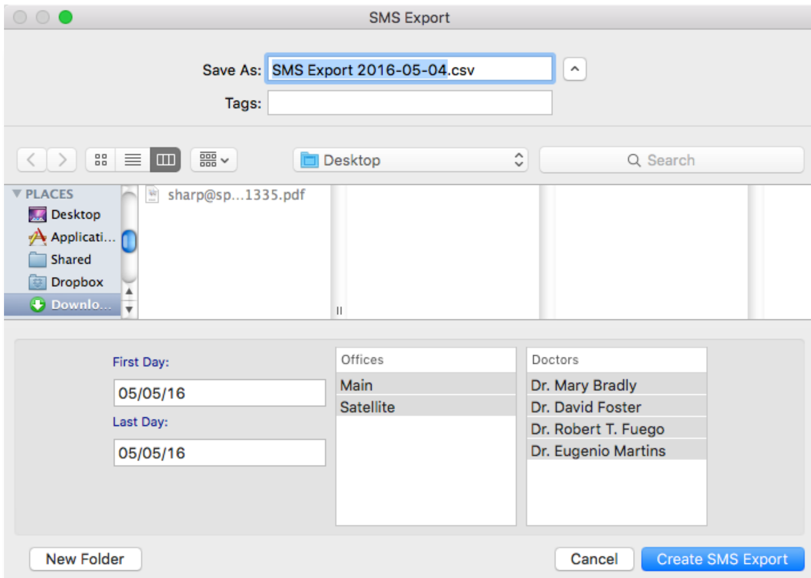


Figure 13-12: SMS *Export*

ScreenPlay Export Click on this option to link to your ScreenPlay application. You must be a Solutions by Design customer (call Solutions by Design for more information 1-800-888-4084)

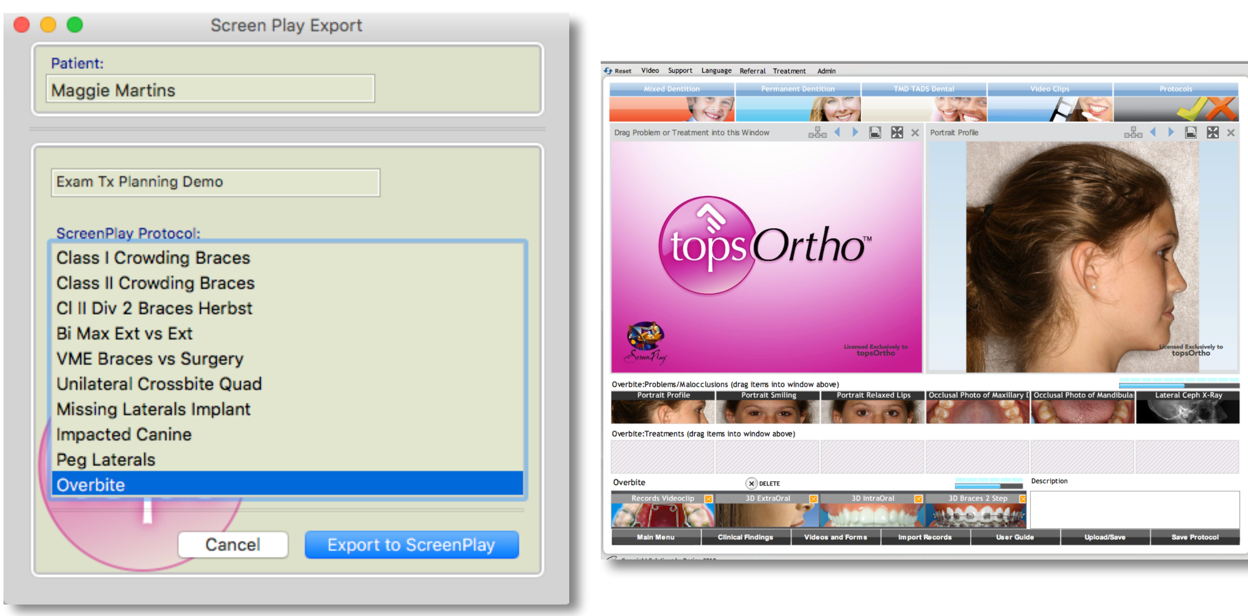


Figure 13-13: ScreenPlay *Export*

Summary

In this lesson, you should feel confident with:
- Using the Action Menu options
- Using the View Menu options
- Using the Utilities Menu options

Lesson 14 Clinical Exam & Treatment Notes

Lesson Fourteen Overview

This lesson will focus on conducting the clinical exam. This will also cover entering records and treatment notes.

Objectives:

To become familiar with the clinical exam, you will:

14A Conduct the Clinical Exam
Conducting the Clinical Exam is an important part of topsOrtho. Entering as much information as possible will help insure that reports are complete.

14B Import Images
topsOrtho allows you to import any type of images, and as many image sets as you require.

14C Customize your Diagnosis and Treatment Plans
You have full control of entering patient diagnosis and treatment plan objectives. Once you’ve customized your clinical procedures you can create a diagnosis and treatment plan objectives for your patients.

14A Conducting the Clinical Exam

This area of Patient Information contains all the clinical data for your patient. All case information, diagnostic and treatment plans, images and treatment notes can be found by clicking on the radio buttons. There are two sections of this window, which can display the same or different information, as your needs dictate. You can also collapse one section and concentrate on only one.

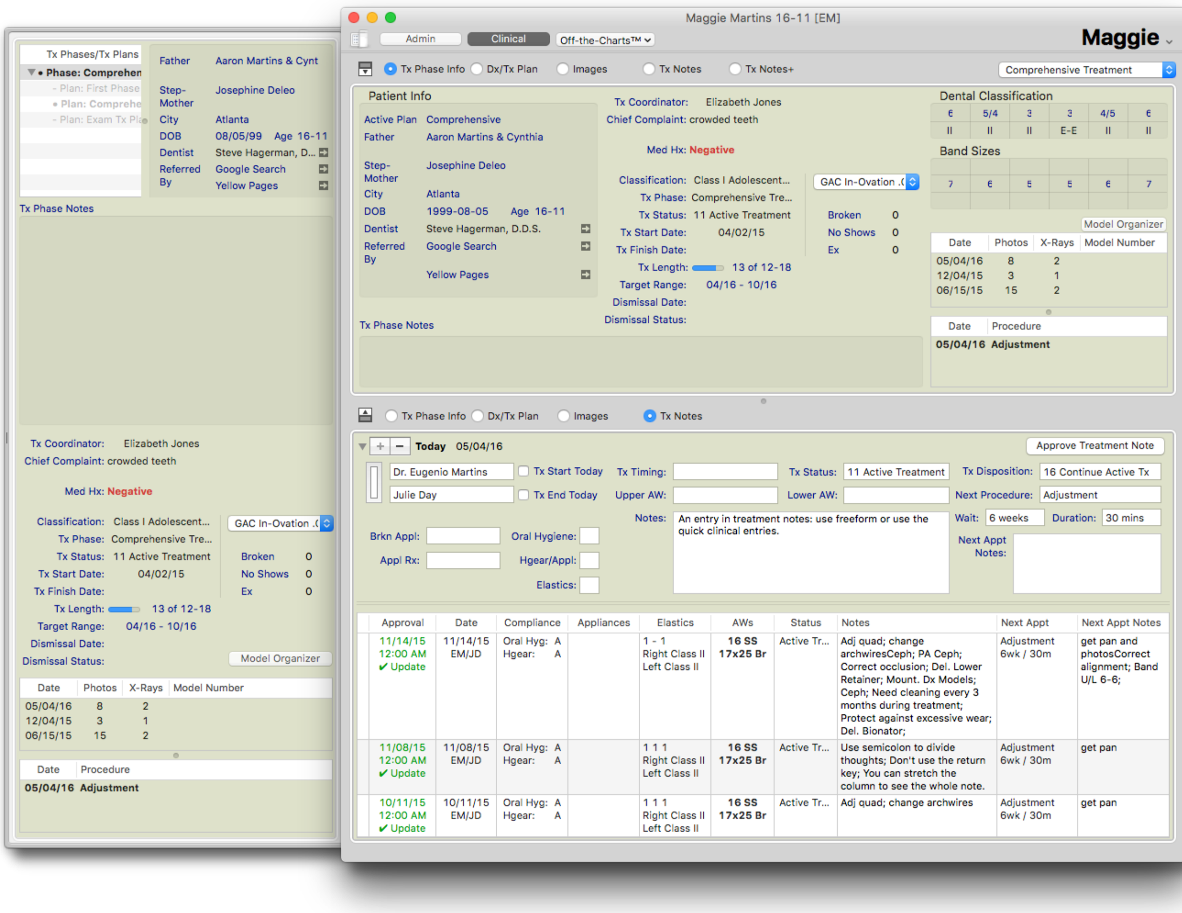
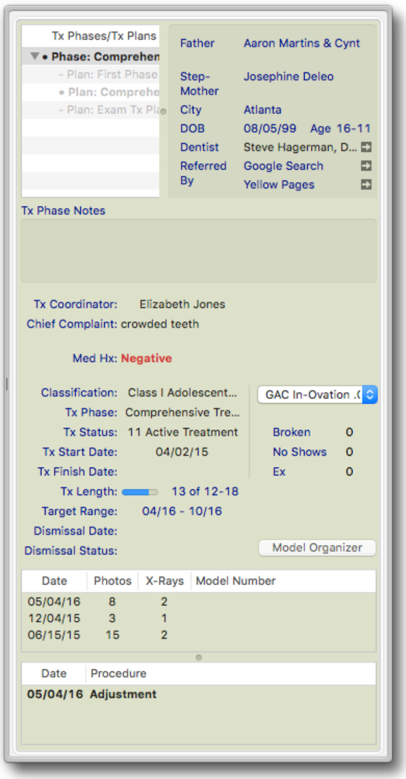


Figure 14-1: *Patient Information Clinical*

Patient Information - Clinical
Phase Information



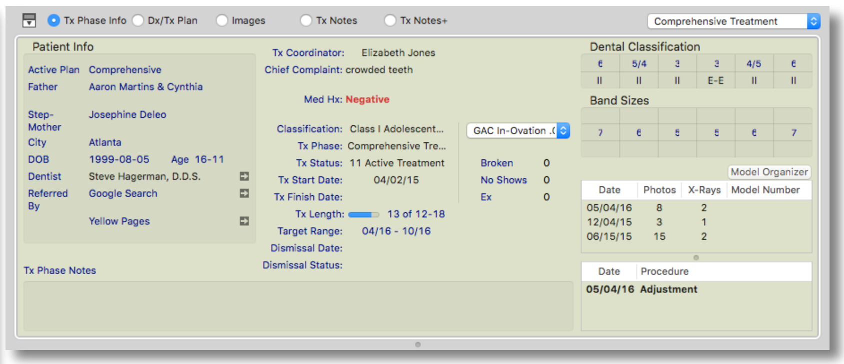


Figure 14-2: *Tx Phase Info and Phase Info Drawer*

The Phase Info Drawer opens automatically to the left, to close the drawer click the toggle button beside the Admin button.

Phase Information contains the dental classification, treatment status information and the model organizer. A phase can have as many treatment plans as necessary for the patient. For example, the phase Comprehensive Treatment could contain several treatment plans depending on the patient's needs.

<u>Phase Name:</u>	Comprehensive Treatment	
<u>Treatment Plan(s):</u>	Full Bonded	($5,000.00)
	SureSmile	($5,700.00)
	Invisalign	($5,900.00)

Each treatment plan can have a different contract associated with it based upon the cost for that particular treatment. You can have several treatment plans and contracts, but only one contract can be **active** for a patient.

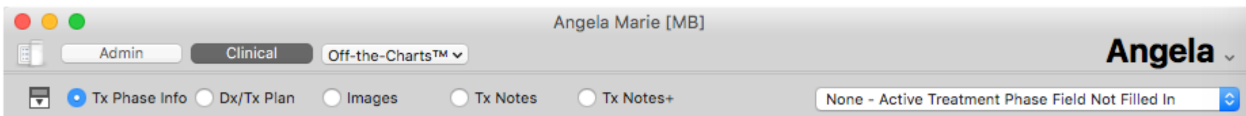
Or you can have use the phase named Phase I with a treatment plan called Partial. You can create use another phase named Phase II with one or several treatment plans for a patient.

<u>Phase Name:</u>	Phase I	
<u>Treatment Plan:</u>	Partial	($2,500.00)

<u>Phase Name:</u>	Comprehensive Treatment	
<u>Treatment Plan(s):</u>	Full Bonded	($5,000.00)
	Invisalign	($5,900.00)

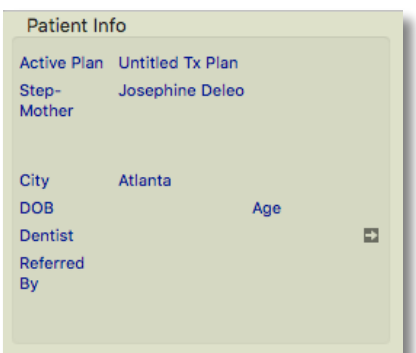
Each treatment plan can be stored, along with the contract for future reference. Phase names should not be modified, as they are used in statistical reporting.

Tx Phase Info



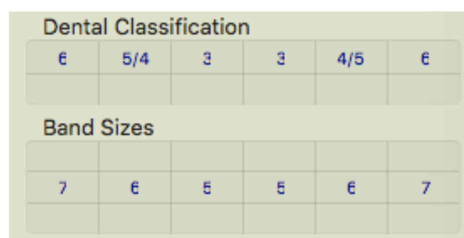
Notice the radio button for Tx Phase Info is filled in.

The default name, None, is displayed to the right of the radio buttons until you create the Tx plan. You can name the plan anything you'd like.



Other information displayed at the top include the account holder's name, the patient's dentist and the Active Plan's name.

By clicking in the boxes, you can select from a list of items to help you complete the Dental Classification and Band Sizes.



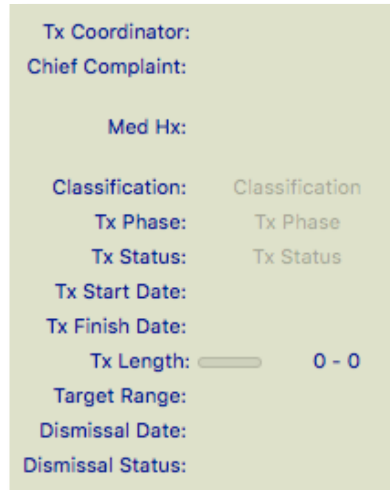
The Band Sizes and Brackets are customizable according to your practice in Practice Setup.

Broken - The number of broken brackets based on the number you enter at each appointment in Treatment Notes/Brkn Appl. This number is cumulative.

No Shows - This will automatically update if a patient misses his appointment.

Ex - Emergency appointments will be calculated here.

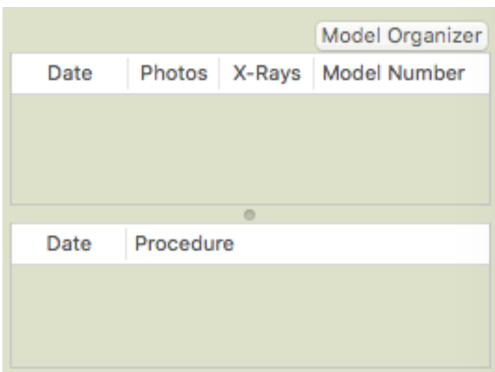
There is an area to display information about the patient's chief complaint and medical history. The medical history is also visible in the Patient Information Admin section under Alerts.



It is important that this information is filled in as specific reports will use this information to provide you will practice statistics.

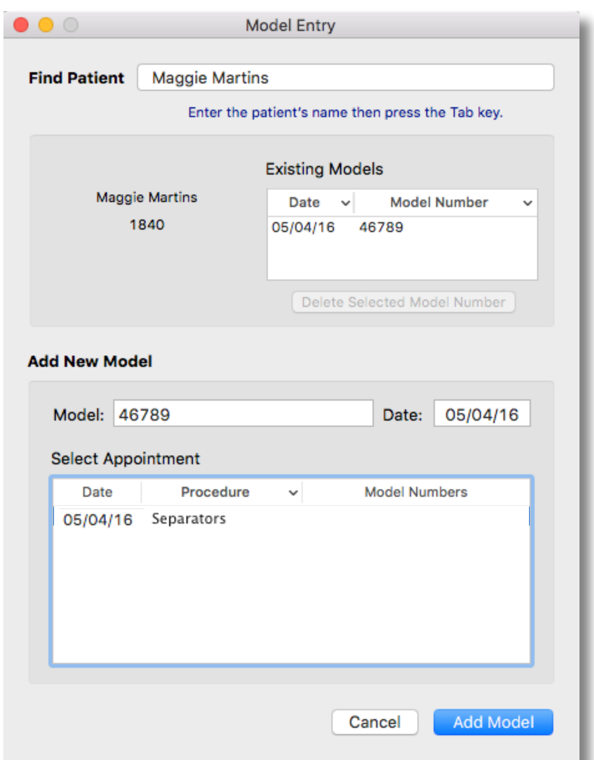
The Tx Length is filled in when you enter information from the Treatment Plan.

The Target Range will automatically calculate once the Treatment Start date and Treatment Length are filled in.



There is also a section which displays the number of photos and x rays you have entered into the patient record. Each time you add photos or x-rays a new line item will be displayed.

The Model Organizer allows you to identify a model with a specific appointment. For example, the records appointment may generate a model in your practice. You can attach the model number to the appointment.



You can select the appropriate appointment, type in the model number and click Add Model. Once you do this, the model is displayed with the corresponding model number on the Case Info section.

To remove a model, click on the Existing Models number and click Delete Selected Model Number.

Future appointments scheduled for this patient are displayed in the Tx Phase section, too.

Dx/Tx Plan

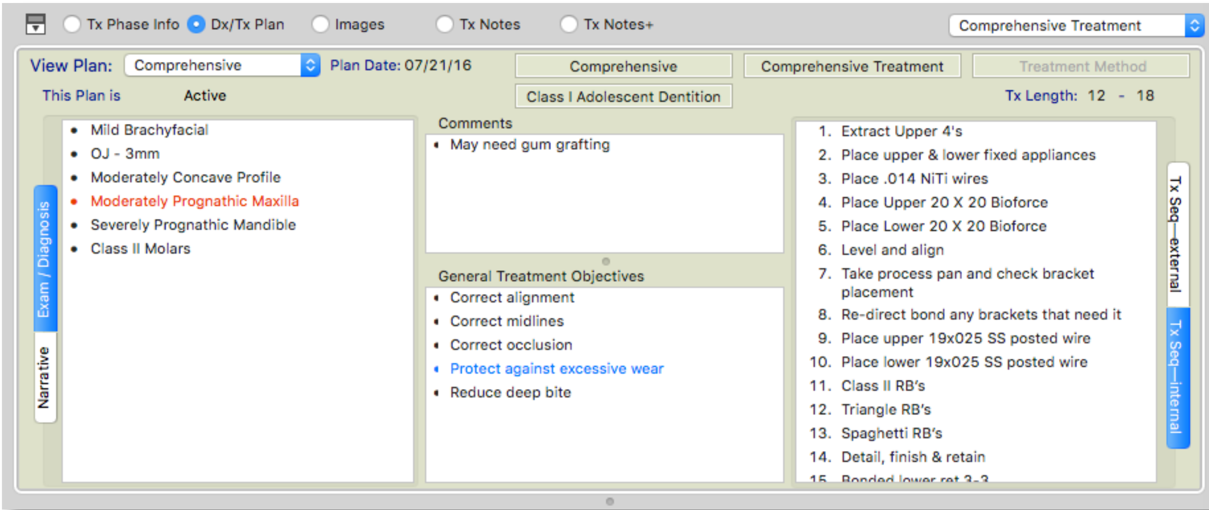


Figure 14-3: *Diagnosis/Treatment Plan*

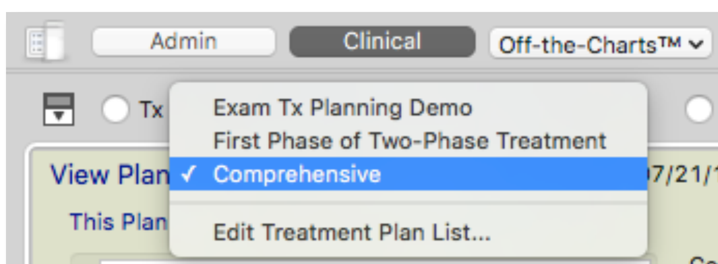
The Diagnosis and Treatment Plan contains information on the patient's current condition, comments about the patient and the general treatment objectives. There is a section for internal treatment sequence and external treatment sequence.

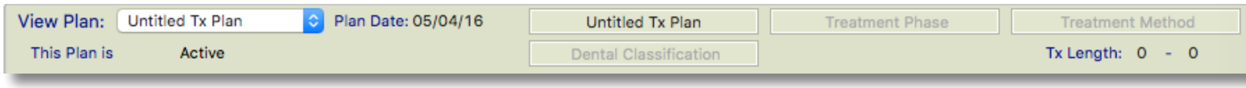
The internal sequence lists the order of procedures undertaken to correct the patient's condition. The external sequence indicates procedures that will be included in any correspondence to the referring dentist.

All items are fully customizable in the Practice Setup according to how your practice operates. The default list can be used as a guide to help you create customized treatment list items.

Conditions entered in this window will appear in letters to the patient and his dentist, if you choose.

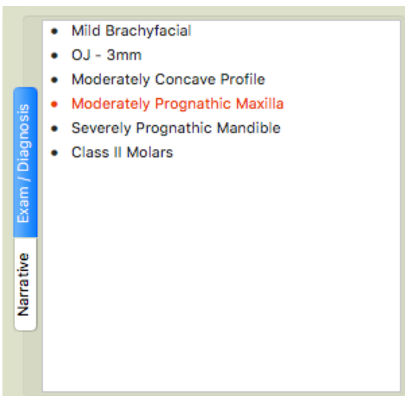
The View Plan is the name of the treatment plan that you are viewing. If you have created more than one plan, click the drop down arrow to select the plan you would like to view.





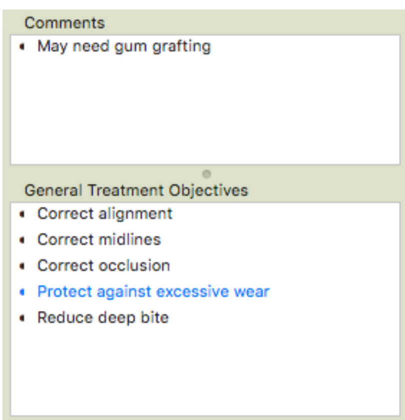
This part of the window also displays the date the plan was created. To the right side of the date it was created is where you name the plan. The default is Untitled Tx Plan, which you type the new plan name in. Then, chose a Treatment Phase. You will also add Treatment Method and Dental Classification in this section. You can customize Tx Methods in Practice Setup.

Entering in the Treatment Length Min and Max months will fill in the information on the Case Info window. The defaults for both text boxes are 0.



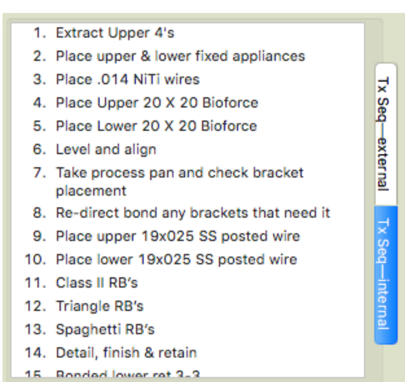
The Exam/Diagnosis area is for entering the patient's current condition. Once you click in this area, a text box will display the options for you to choose.

The Narrative section is for entering text freehand. This information cannot be printed.



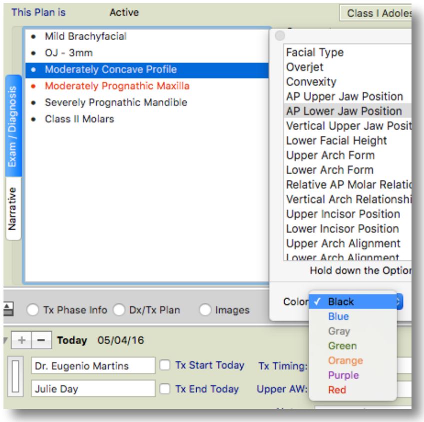
Comments can be selected from a list of customized comments or entered manually.

The General Treatment Objectives can also be entered from a customized list, or entered manually.



The internal treatment sequence can be selected from a list of customized items, or several items can be entered as a group. You can also enter the sequence manually.

To enter external treatment sequence, click the tab and enter from the list or manually.



You can color code lines of text in the Dx/Tx Plan area. Select the text and choose the color from the drop-down list.

Images

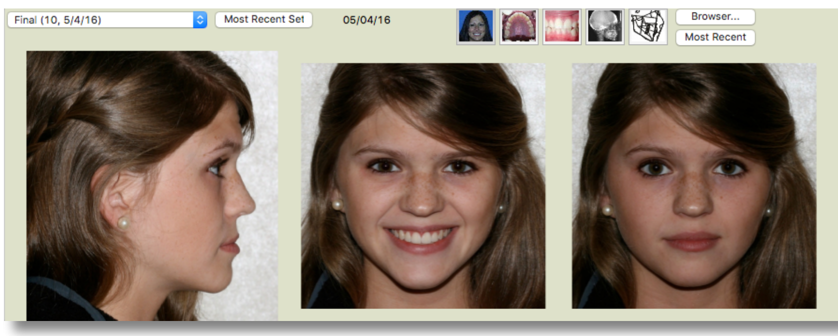
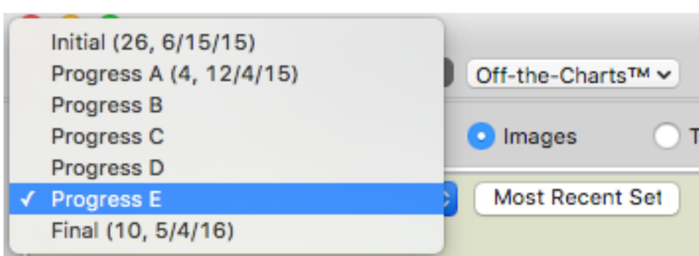


Figure 14-4: *Images*

All of your images can be imported into topsOrtho. It's as easy as dragging and dropping. Each image set is saved with a name that you can access anytime you need to. The most recent facial smile photo will always be displayed in Patient Information so you can easily place a name with a face. Click the Most Recent Set button to view the images taken last.



You can select the image set with the drop down arrow, or go into the Browser
From the upper portion of the window, select the image set that you want to view. You can view the most recent by clicking on the Most Recent button.The number of images in each set is shown in parenthesis beside the set's name.

By clicking on the smile facial photo, your patient's three facial photos will be displayed. If you click on the upper occlusal, the patient's upper and lower occlusal photos will be displayed. Likewise, click on the intra-oral frontal photo for a display of the intra-oral photos. The same is true of X-rays and tracings. Click the icon and the Most Recent button to view the most recent image or X-ray.

By clicking the Browser... button, you can go into the browser and edit the photos if desired. Images will be discussed thoroughly in a later lesson.

Tx Notes

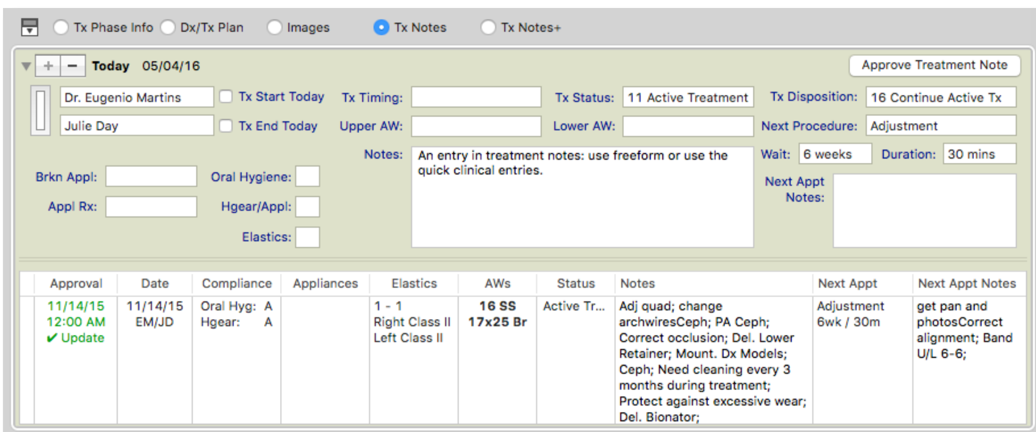


Figure 14-5: *Treatment Notes*

Entering treatment notes in topsOrtho is ***essential***. Treatment notes can be viewed in Patient Information as well as in a list. By entering the next procedure, you are advising the front desk about the patient's next appointment, since this information appears on Patient Flow.

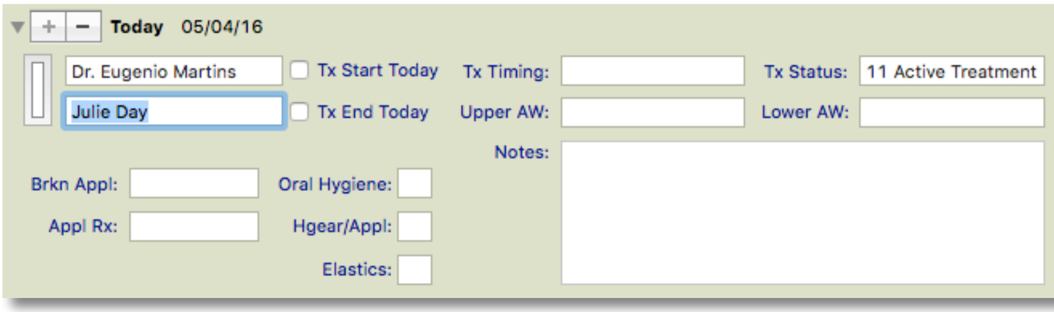
You can select the person responsible for the note and color-code the note, if desired. Each item is fully customizable for your practice in Practice Setup.

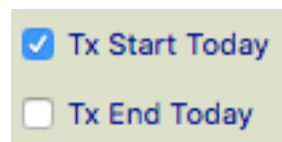
You can only create one treatment note per patient per day in topsOrtho, but you can add to the note later in the day. Once rollover occurs at midnight, the note is static and cannot be modified or deleted.

Click the + plus to add a new note for today. Select the doctor and the staff member responsible for the note's entry.

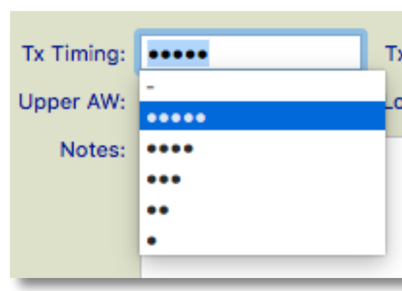
Select the number of Broken Appliances, if applicable, Oral Hygiene and appliance compliance and select the proper amount of time.

Remember to use Tab to move from field to field.

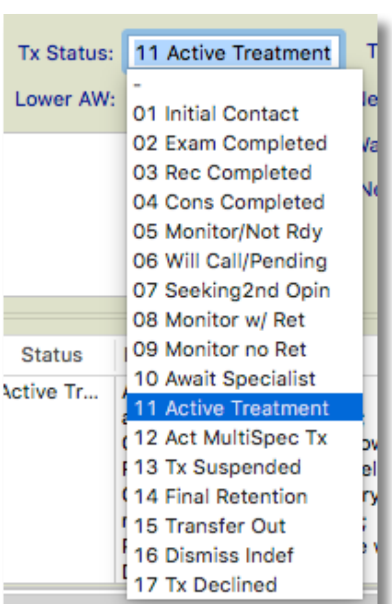




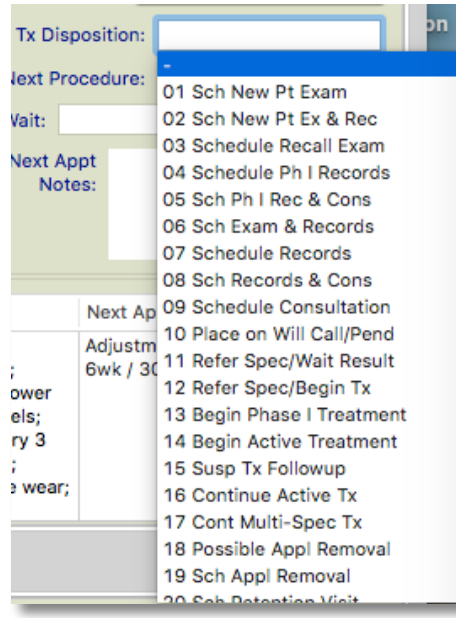
There are checkboxes to mark an appointment as Tx Start Today or Tx Finish Today. Once checked the date is added to the Admin and Phase Info areas. If the start or finish date is already entered a notification window will display, and you'll be asked to verify the date. Select the correct date to move forward. Be sure the start & finish dates are accurate so your practice's figures are accurate. Notes can be freeform and will appear on a treatment note list.



Tx Timing (Treatment Timing)
This is a self grading mechanism for Treatment Timing. It's a measure of whether patients are on course or behind schedule. The Treatment Timing score is displayed in Treatment Notes and in the Treatment Notes List.



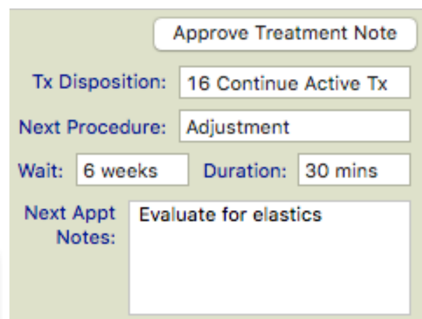
Treatment Status
The Treatment Status field was created to track where each patient is in treatment right now. Are they in active treatment or are records complete? Get familiar with Treatment Statuses. Statuses are fixed and cannot be edited. Pick the status your patient is in right now from the choices provided. Statuses will carry over from appointment to appointment.



Treatment Dispositions

Treatment Dispositions were designed to tell you generally what comes next for the patient, i.e., Schedule Records, Begin Active Treatment or Continue Active Treatment. Dispositions are used to track where you want the patient to head to next in treatment. Future appointments can tell you part of the story, but if the patient doesn't make an appointment or misses an appointment, we won't have the information on what should happen next for that patient. However, dispositions are not comprehensive terms. Dispositions are fixed and cannot be edited**.**

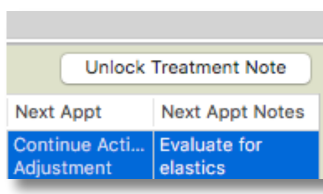
This section should always be filled out. It advises the front desk of the patient's next appointment. It is an easy task to search for an appointment from Patient Flow once this information is filled in.Disposition is required and can be linked to the Usual Next Appointment to auto populate the Next Procedure field. You can link them in Practice Setup, Labels.



Approve Treatment Note

You can approve Treatment Notes directly in the patient's chart. To approve a note, press the Approve Treatment Note button and enter your topsOrtho password.

Unlock Treatment Note

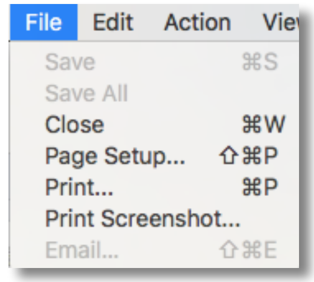


You can also unlock Treatment Notes for editing until rollover. To unlock, press the Unlock Treatment Note button and enter your topsOrtho password.

Note: When you approve Treatment Notes it locks them from future edits for the day. Please be sure everyone is finished before approval. They will also lock automatically at rollover.

This area contains all treatment notes for a patient. You can change the size of a column to display more of the information in that column and double click a treatment note to view the entire note.

Approval	Date	Compliance	Appliances	Elastics	AWs	Status	Notes	Next Appt	Next Appt Notes
	05/04/16 EM/JD			1 - 1 Right 34 Box Left 34 Box	16 SS 17x25 Br	Active Treatment	An entry in treatment notes: use freeform or use the quick clinical entries.	Continue... Adjustment 6wk / 30m	
11/14/15 12:00 AM ✔ Update	11/14/15 EM/JD	Oral Hyg: A Hgear: A		1 - 1 Right Class II Left Class II	**16 SS 17x25 Br**	Active Treatment	Adj quad; change archwiresCeph; PA Ceph; Correct occlusion; Del. Lower Retainer; Mount. Dx Models; Ceph; Need cleaning every 3 months during treatment; Protect against excessive wear; Del. Bionator;	Adjustment 6wk / 30m	get pan and photosCorrect alignment; Band U/L 6-6;



You can print Treatment Notes:
1. Click a treatment note to print whole list.
2. From the tops menu bar select Print.
3. Select margins.
4. Select Print.

Tx Notes +

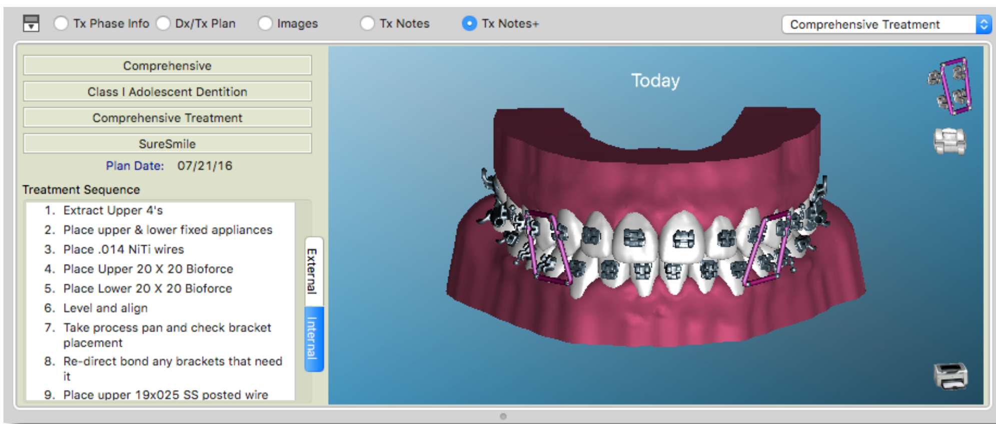


Figure 14-6: *Treatment Notes +*

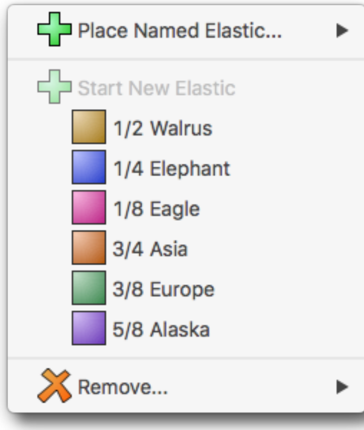
The Treatment Notes + view is the default view when you open the Clinical chart. In this area there is a 3D tooth chart which is used to record orthodontic treatment. The tooth chart begins as a blank slate for each patient. You'll place brackets and elastics to match the patient's current orthodontic situation. At each appointment, you should update the tooth chart to reflect bracket and elastic changes. As you move through past treatment notes, changes will be shown on the tooth chart. You can customize brackets and elastics types and colors, display brackets, lingual buttons and elastics on the tooth chart, remove teeth, and email or print images from the tooth chart.

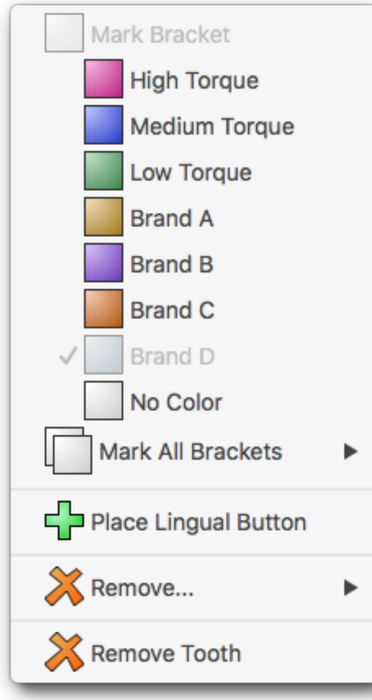
Viewing the tooth chart
1. Double-click the tooth chart to view in full screen mode.
2. To exit the full screen view, double-click again on the tooth chart or press the esc key.

Manipulating the tooth chart
1. Place your mouse anywhere on the tooth chart and drag right or left to the desired position. Dragging up or down opens or closes the model.
2. Press the right, left, up or down arrow on your keyboard.
3. You can also use the trackpad on a laptop.

Placing brackets and elastics

1. From the tooth chart, right click and select the appropriate choice to place brackets.
2. From the tooth chart, left click and select the appropriate choice to place elastics.





14B Importing Images

topsOrtho integrates with all imaging software, digital X-ray machines, cameras and scanners. The default is 7 sets of images per treatment plan (Initial, Progress A through E and Final), but you can create more if you need to. You can store a patient's facial photos, intra-oral photos, panoramic X-rays, cephalometric X-rays, cephalometric tracings, study models and any other X-rays or photos you may need. You can include any of the images stored in a patient's information screen in a letter to the referring dentist or the patient.

topsOrtho allows you to import images from any imaging system or directly from a digital camera. You must first know where the images are stored on your imaging system. Here are a few ways to access them in your practice.

Digital Camera: Connect your camera directly to the topsOrtho workstation with a USB cable. Follow your camera's instructions to import images from the camera to the workstation. Open the folder where you've stored the photos. (iPhoto comes with every Mac and we recommend you use it to edit and store photos.)
Digital X-ray: Save your images to an external hard drive or storage device, or burn them onto a disk. Another option is to set up File Sharing on your Digital X-ray PC, then mount the Shared Files on the desktop of the topsOrtho workstation to which you'll be importing the images.
Other Imaging Systems: Save your images to an external hard drive or storage device, or burn them onto a disk. Another option is to set up File Sharing on your Digital X-ray PC, then mount the Shared Files on the desktop of the topsOrtho workstation to which you'll be importing the images.

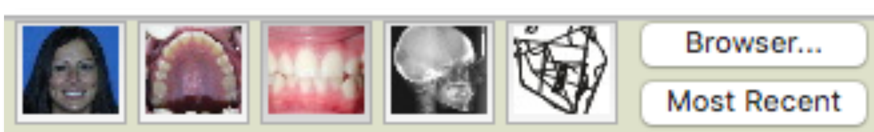
If you need help setting up File Sharing on your PC, topsOrtho customer support can provide documentation. Your network technician can also help.

Importing Images

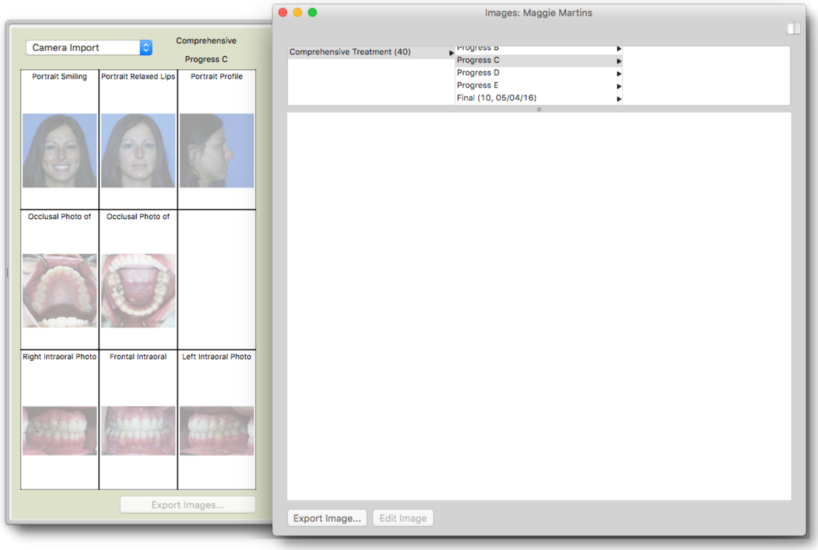
1. Open Patient Information and select the Images radio button.
2. Click Browser to open the image drawer.
3. From the Images window, select the case, image set and import type.
4. Locate the folder where the patient's images are stored.
5. Drag and drop the folder to the left position of the selected import drawer (Portrait Smiling).
6. Images will auto-populate and the area will turn yellow when images are dropped.
7. If any images are in the incorrect position, drag and drop them to the correct spot.
8. Single-click the Portrait Smiling photo and the Edit Image button to begin editing.

Figure 14-7: *Images*

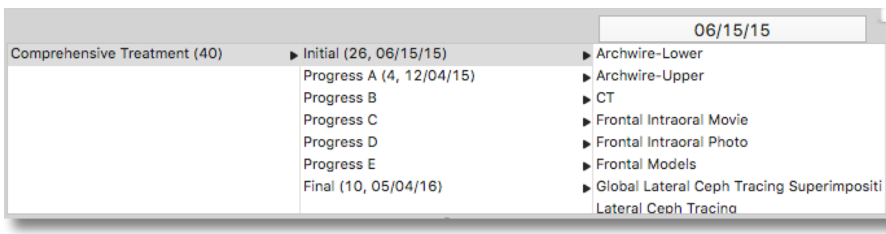
Image thumbnails allow you to click on the type of image that you would like to view. These are only examples.



Once the images are in topsOrtho, you can select any type of view that you'd like. For example, if you import images into topsOrtho using the "QC Studio Import" but would like to view them in the "Camera Import" mode, just click Camera Import and the pictures will automatically rearrange for this view.



The number of images and date are shown in parenthesis next, where applicable.



Photography tips

1. Back up! Don't crop your photos with the camera; more background is better.
2. Hold the camera at eye level for portrait shots. Don't compensate for head position with the camera. Reposition the patient, sit down to shoot, or bend your knees.
3. Use a dark background for portraits. Dark backgrounds eliminate shadows and highlight facial features.
4. For upper and lower occlusal photos, keep the lips away from the teeth (bigger retractors are better), and keep the midline perpendicular to the plane of the viewfinder.
5. To keep intraoral photo mirrors from fogging, run them under warm water just before taking the photo.
6. Intraoral photos should be taken with the occlusal plane parallel to the plane of the viewfinder. The camera should be angled only when the occlusal plane is canted.
7. Remember the goal of intraoral frontal and buccal shots is to clearly see the occlusion.

Once your images have been imported, you may need to edit them. For example, if you use buccal mirrors, you'll need to flip the images to indicate the proper orientation. If the patient tilted his head, you may need to rotate slightly. You may have taken the photo with too much open space and need to crop. This is all done within the Edit Image feature of topsOrtho.

The editing window opens full screen to take advantage of those big and beautiful Macs. If you don't like full screen, just hold the Option key when you click Edit Image. (Full screen is great for editing images, though!)

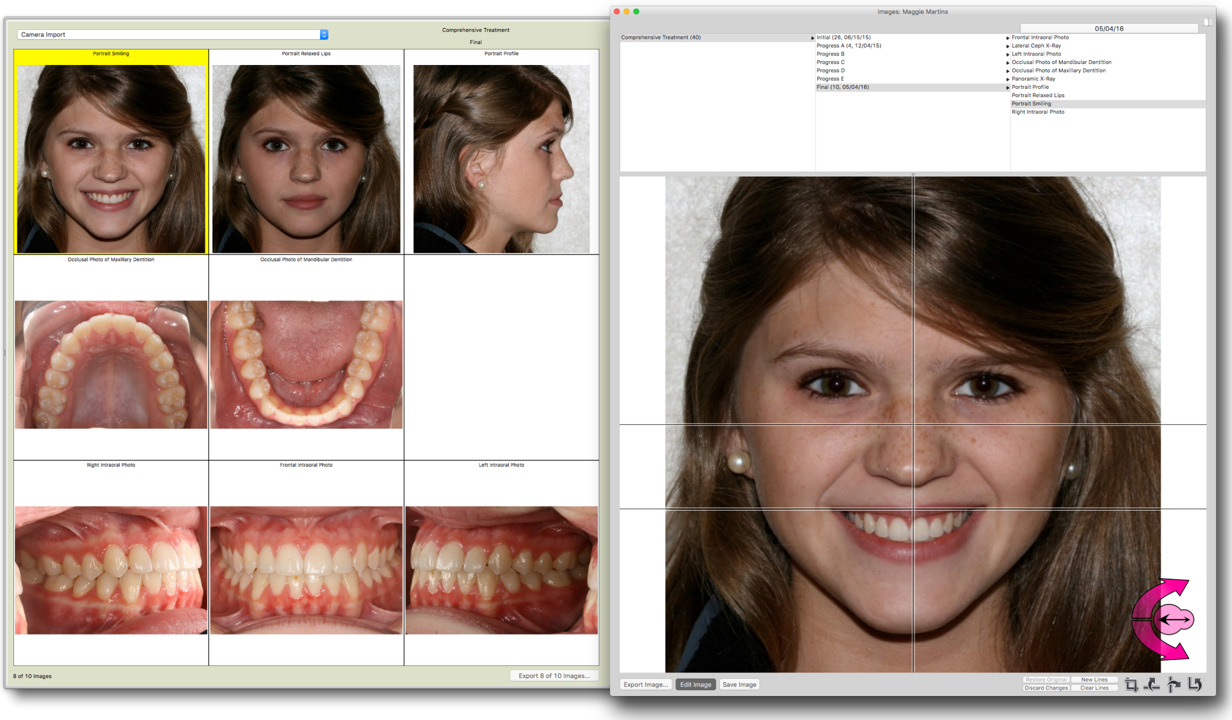
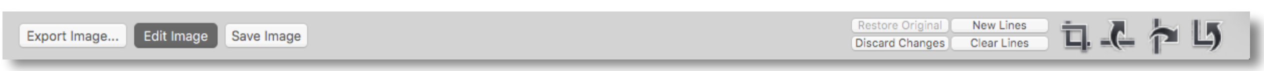


Figure 14-7: *Editing Images*

The controls are-easy to learn and are explained below.



Defining the edit buttons

Export Image...: allows you to export and save the image to another location.

Edit Image: activates the editing buttons and places 3 lines (1 vertical and 2 horizontal) on the photo. Reposition the image, not these lines, as they will serve as guides from image to image to ensure size consistency.

Save Image: saves your edits.

Restore Original: reinstates the photo to the imported version after saving.

Discard Changes: resets changes made to your image before saving.

New Lines: adds a movable horizontal line to the image, which can be used as a reference point.

Clear Lines: removes the horizontal lines.

Square up image: click to square up the image, which creates a perfectly squared image for optimal framing and viewing. Adds black area to the photo to create a 1:1 aspect ratio. When editing is complete, the added area will not be visible (unless images are being shot too closely).

Flip horizontal: click this button to flip the image on its horizontal axis.

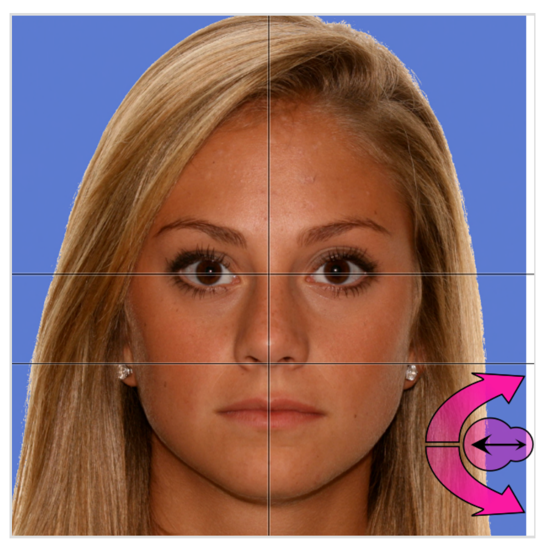
Flip vertical: click this button to flip the image on its vertical axis.

90 degree rotation: click this button to rotate the image precisely 90 degrees

Images are automatically scaled for storage optimization when imported. It is not necessary to change your camera settings.

Editing Basics

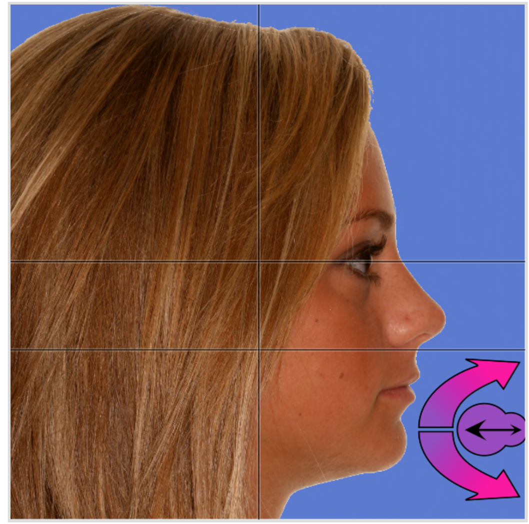
1. Click the image from the import drawer to open.
2. Click Edit Image to activate the editing buttons.
3. Position the image, not the reference lines, to ensure image size consistency.
4. Remember: “Square between the eyes!” This means square up your image and place the upper horizontal line directly between the eyes. Everything else is fine tuning.
5. You can always discard changes or restore to original (after saving) if you need a do-over.
6. Click Save Image when finished.



Portrait Smiling and Portrait Relaxed Lips

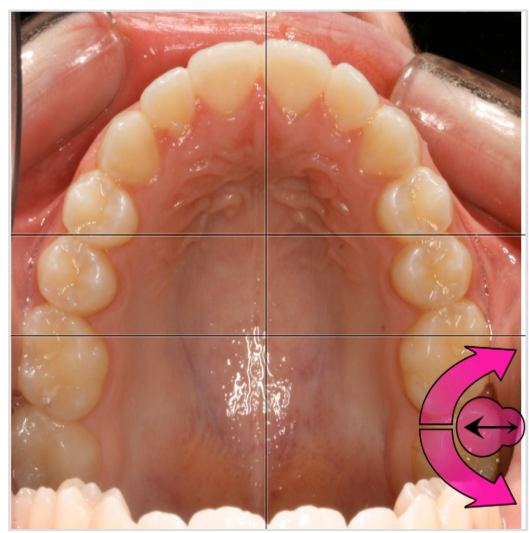
1. Click the portrait smiling photo.
2. Select the square up button. Position the image. Click on the image and drag the image so the upper horizontal line bisects the eyes and the vertical line bisects the midline.
3. Rotate the image. Click and slide along the pink curved arrows.
4. Resize the image. Click and slide along the horizontal pink arrow. You want the lower horizontal line at the base of the nose and the black area from squaring the photo is no longer be visible.
5. Click Save Image.

Portrait Profile



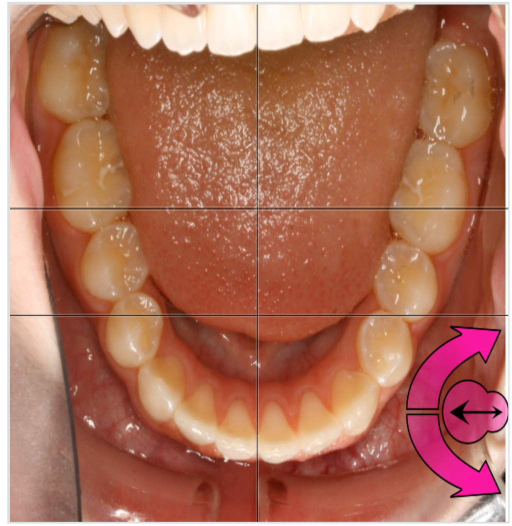
1. Click the photo to begin.
2. Click the Square Up button.
3. Position the image. Click on the image and drag the image until the upper horizontal line bisects the eyes.
4. Rotate the image. Click and drag on the pink curved arrow in the appropriate direction until the vertical line intersects the upper horizontal line at the temple.
5. Resize the image. Click and slide along the horizontal pink arrow until the lower horizontal line at the base of the nose and the black area from squaring the photo is no longer be visible.
6. Click Save Image.

Maxillary Occlusal



1. Click the photo to begin.
2. Click the Square Up button.
3. Click the Flip Vertical button.
4. Position the image. Click on the image and drag the image until the vertical line bisects the midline.
5. Rotate the image. Click and drag on the pink curved arrow until the upper horizontal line is between the 1st and 2nd bicuspids (dependent upon dentition and any missing teeth).
6. Resize the image. Click and slide along the horizontal pink arrow until the black area from squaring the photo is no longer visible, and the molar to molar arch form is visible. If you want the arch form bigger, zoom in closer.
7. Click Save Image.

Mandibular Occlusal



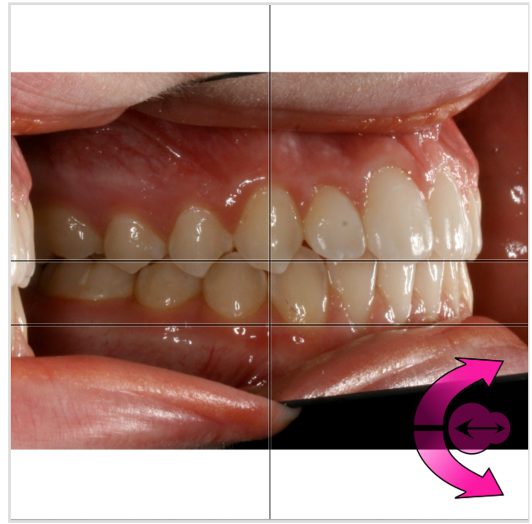
1. Click the photo to begin.
2. Click the Square Up button.
3. Click the Flip Vertical button.
4. Position the image. Click on the image and drag the image until the vertical line bisects the midline.
5. Rotate the image. Click and drag on the pink curved arrow until the upper horizontal line is between the 1st and 2nd bicuspids (dependent upon dentition and any missing teeth).
6. Resize the image. Click and slide along the horizontal pink arrow until the black area from squaring the photo is no longer visible, and the molar to molar arch form is visible. If you want the arch form bigger, zoom in closer.
7. Click Save Image.

Frontal Intraoral

Do not square.

1. Click the photo to begin.
2. Position the image. Click on the image and drag the image until the vertical line bisects the midline.
3. Rotate the image. Click and drag on the pink curved arrow until the upper horizontal line is at the occlusal plane.
4. Resize the image. Click and slide along the horizontal pink arrow until the lower vertical line is at a chosen gingival margin reference point, e.g. cuspid or incisor. Watch for recession, as you will use this point for the right and left buccal images for consistent sizing.
5. Click Save Image.

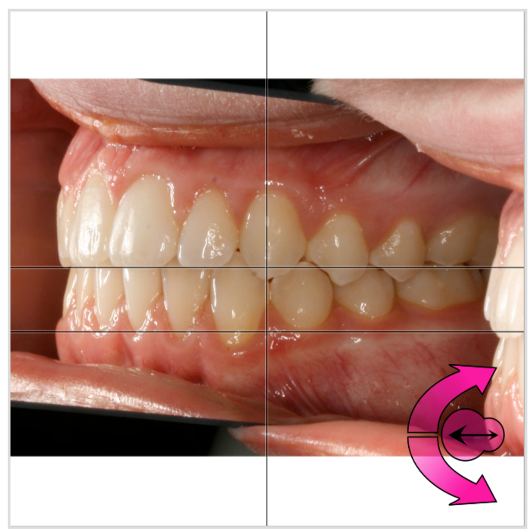
Right Intraoral



Do not square.

1. Click the photo to begin.
2. If you used buccal mirrors, click the Flip Horizontal button. If not, proceed to step 3.
3. Position the image. Click on the image and drag the image until the vertical line bisects the upper cuspid.
4. Rotate the image. Click and drag on the pink curved arrow to fine-tune placement of the upper horizontal line along the occlusal plane.
5. Resize the image. Click and slide along the horizontal pink arrow until the lower vertical line is at the gingival margin reference point you chose from the frontal shot.
6. Click Save Image.

Left Intraoral



Do not square.

1. Click the photo to begin.
2. If you used buccal mirrors, click the Flip Horizontal button. If not, proceed to step 3.
3. Position the image. Click on the image and drag the image until the vertical line bisects the upper cuspid and the upper horizontal line is at the occlusal plane.
4. Rotate the image. Click and drag on the pink curved arrow to fine-tune placement of the upper horizontal line along the occlusal plane.
5. Resize the image. Click and slide along the horizontal pink arrow until the lower vertical line is at the gingival margin reference point you chose from the frontal shot.
6. Click Save Image.

14C Customizing Diagnosis and Treatment Planning

topsOrtho enables you to print patient educational correspondence at the time of exam or mail it to the patient at a later date. If you already have a new patient exam sheet or questionnaire, it's easy to replicate it in topsOrtho. There may be categories and entries that you do not use; the Plus and Minus symbols will be available if you can delete or add to a category.

All diagnosis and treatment planning information can be automatically entered into a patient's letter. Lay observations can be used in letters, so be sure to add or modify them according to your preferences.

Existing Conditions

Existing conditions are what the patient is currently exhibiting. You will want to select each category and customize the observations and lay observations. You are able to add or delete both categories and observations.

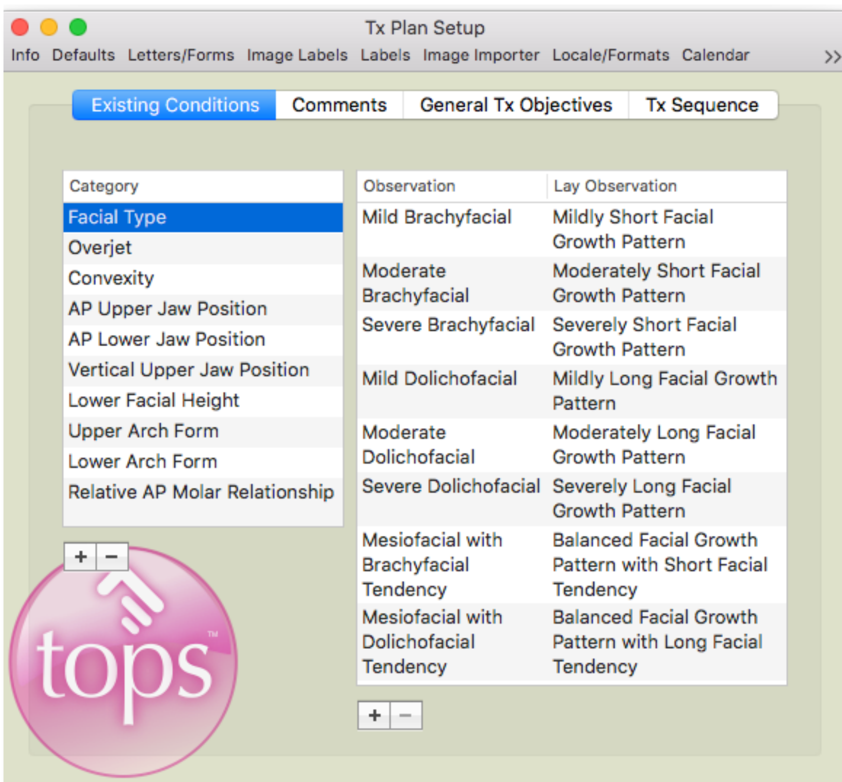


Figure 14-8: *Existing Conditions*

Customize Existing Conditions

1. Click topsOrtho from the menu bar.
2. Click Practice Setup...
3. Enter your password.
4. Click Tx Plan tab.
5. Click Existing Conditions (if necessary).
6. Add/Delete as necessary.

Comments

Comments are any additional information that you might use on a routine basis for patients when entering diagnosis and treatment objectives.

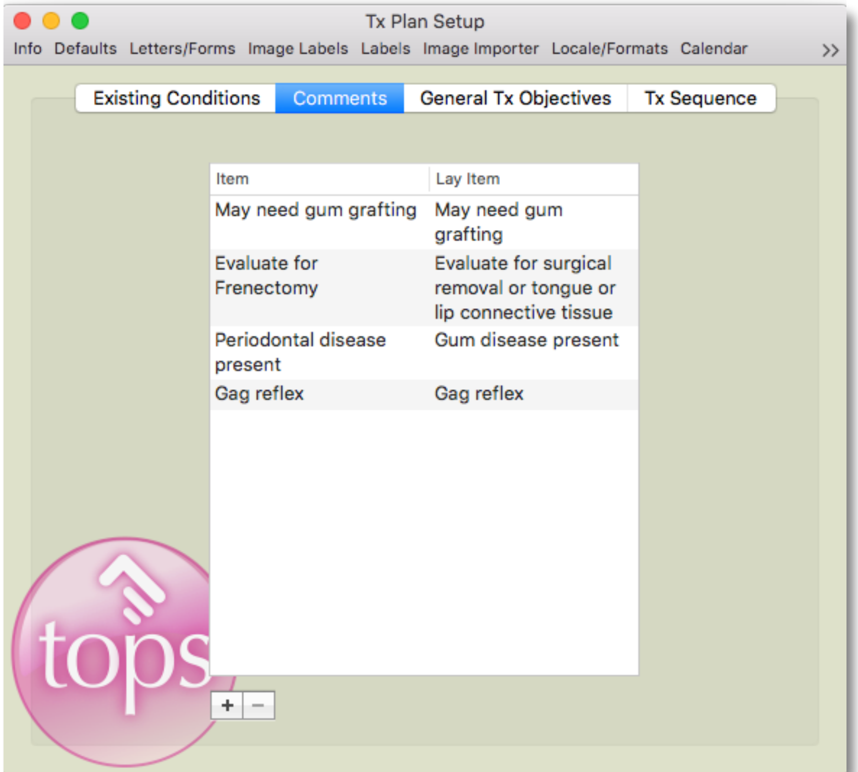


Figure 14-9: *Comments*

Customize Comments

1. Click topsOrtho from the menu bar.
2. Click Practice Setup...
3. Enter your password.
4. Click Tx Plan tab.
5. Click Comments.
6. Add/Delete as necessary.

General Treatment Objectives

General Treatment Objectives are the overall goals for your patient. Any general treatment objective can be modified, or, as in Existing Conditions and Comments, items can be added or deleted.

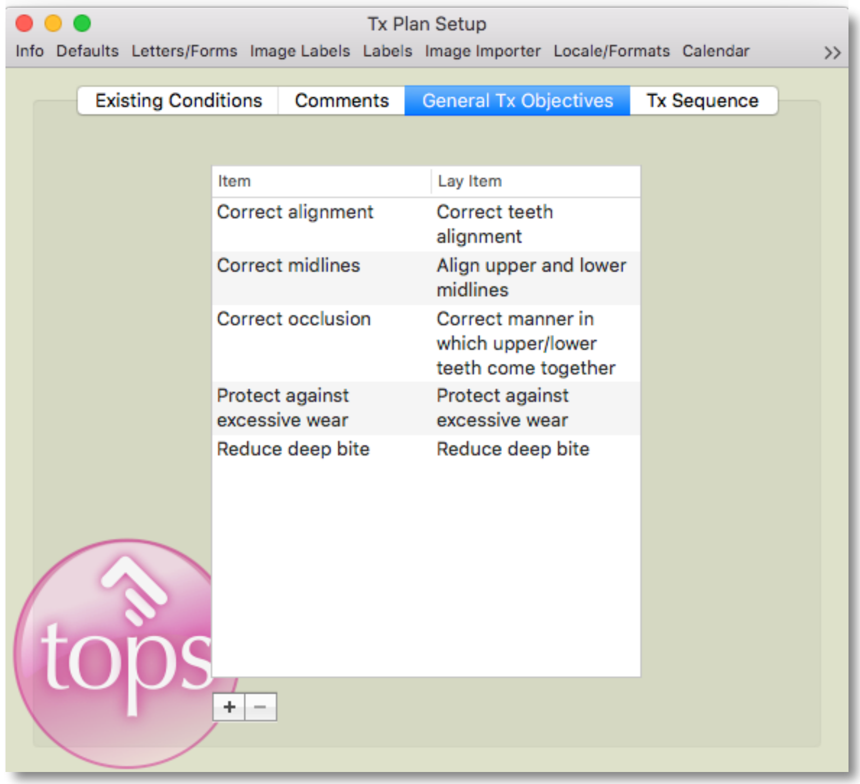


Figure 14-10: *General Tx Objectives*

Customize General Treatment Objectives

1. Click topsOrtho from the menu bar.
2. Click Practice Setup...
3. Enter your password.
4. Click Tx Plan tab.
5. Click General Treatment Objectives.
6. Add/Delete as necessary.

Treatment Sequence
Treatment Sequence is the order of the procedures taken to reach a patient's treatment goals. You can add individual procedures or group commonly used procedures under a name that you create for faster data entry.

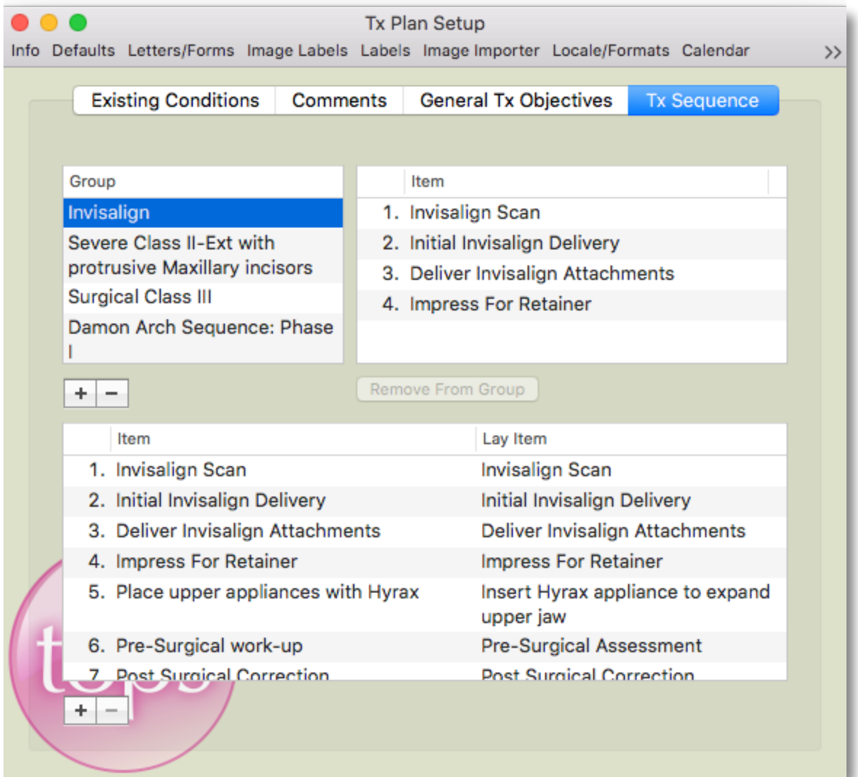


Figure 14-11: *Treatment Sequence*

Customize Treatment Sequence
1. Click topsOrtho from the menu bar.
2. Click Practice Setup...
3. Enter your password.
4. Click Tx Plan tab.
5. Click Treatment Sequence.
6. Modify, add or delete any of the items in the lower window first. Groups are created after the items have been customized.

Creating Groups

1. Click the Plus + symbol under the Group section.
2. Type a name for your group.
3. Click on the first item you wish to add.
4. Drag into the empty item box to the right of the Group.
5. Release the mouse. Repeat as necessary to finish the group items.

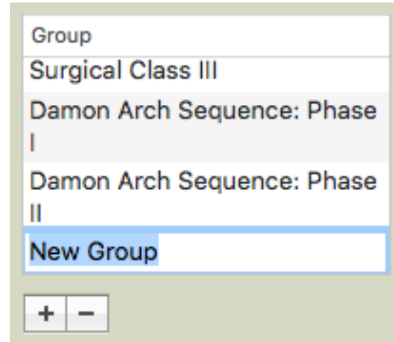


Figure 14-12: *New Group*

Customizing Treatment Notes

This feature allows the clinical staff to enter notes about patients in a fast and consistent format. You can customize each entry according to your practice.

Quick Clinical Entries

Quick Clinical Entries are divided into five categories. Each category contains default information that can be modified according to your practice.

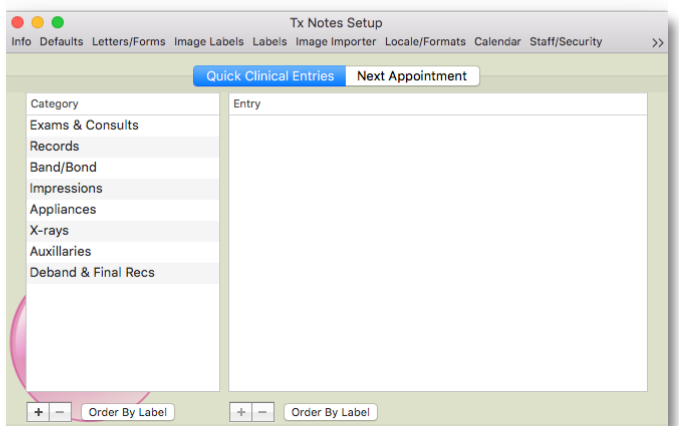


Figure 14-13: *Treatment Notes - Quick Clinical Entries*

The Exams & Consults category contains the following entries:

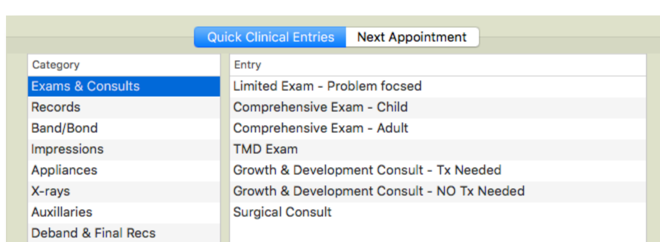


Figure 14-12: *Exams & Consults Category entries*

The Records category contains the following entries:

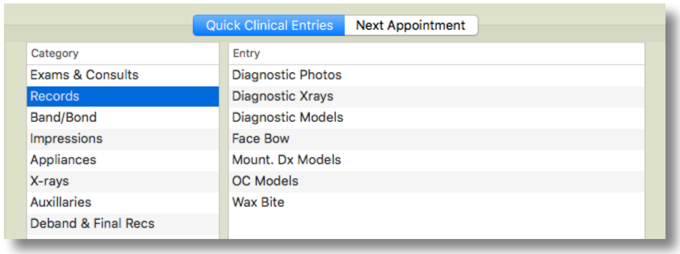


Figure 14-14: *Records Category entries*

The Band/Bond category contains the following entries:

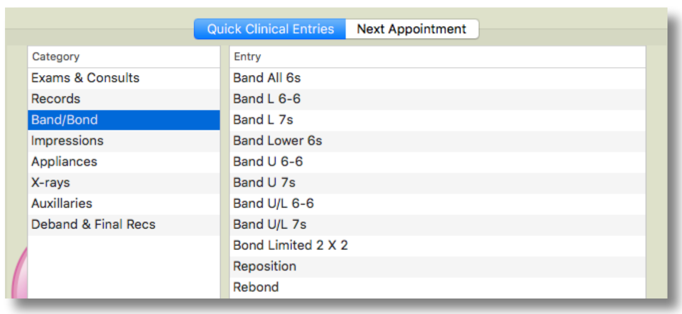


Figure 14-15: *Band/Bond Category entries*

The Impressions category contains the following entries:

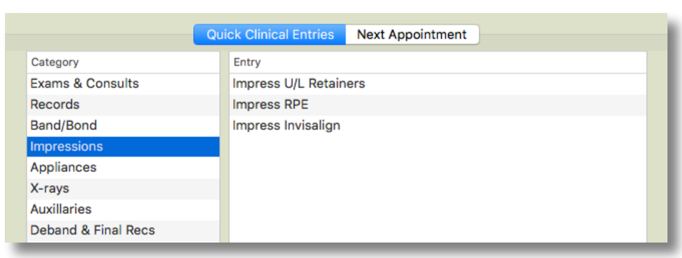


Figure 14-16: *Impressions Category entries*

The Appliances category contains the following entries:

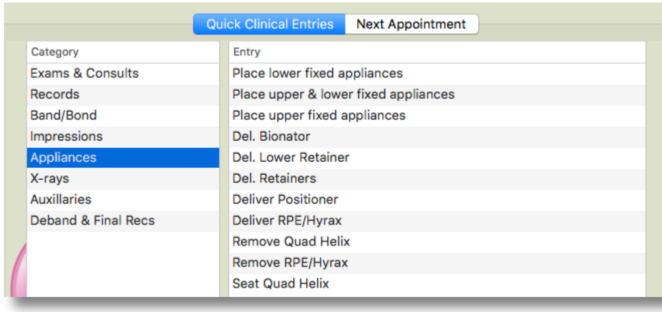


Figure 14-17: *Appliances Category entries*

The X-rays category contains the following entries:

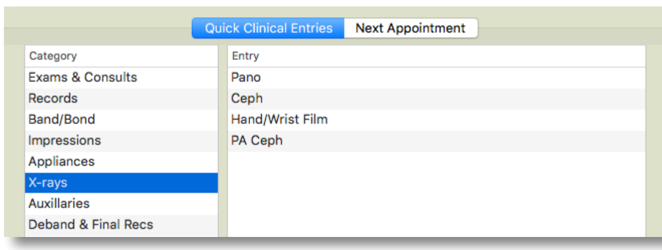


Figure 14-18: *X-rays Category entries*

The Auxiliaries category contains the following entries:

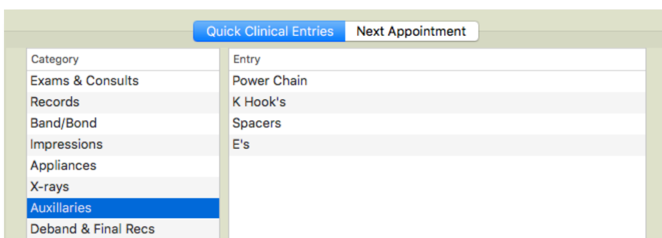


Figure 14-19: *Auxiliaries Category entries*

The Demand & Final Recs category contains the following entries:

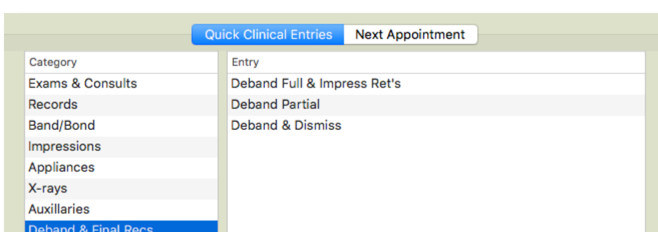
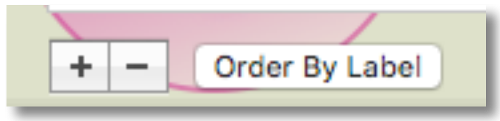


Figure 14-20: *Demand & Final Recs Category entries*

Each of these categories and entries can be customized according to the entries that your practice commonly uses.



If the + and - (plus and minus) symbols are available (bolded), you can add or delete from the list. You can also alphabetize the list by clicking on the Order By Label button.

Next Appointment

Customizing the Next Appointment category allows you to schedule appointments according to your protocol. If you do not schedule an appointment by a listed entry, simply delete it or move it to the bottom of the list by dragging. The list default is ordered by the number of days.

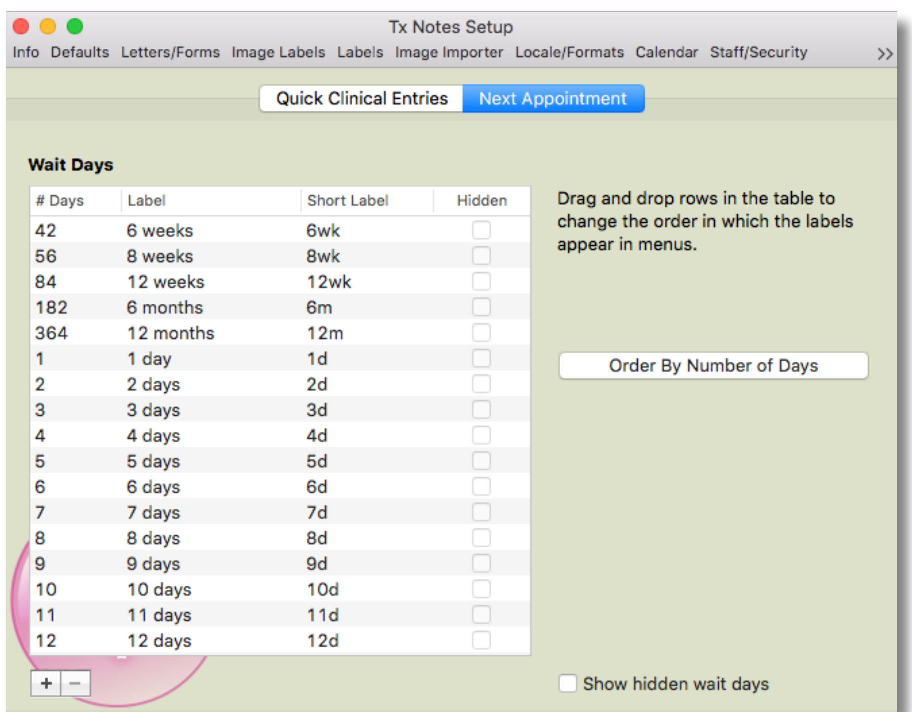


Figure 14-21: *Next Appointment*

Customizing Treatment Notes

1. Click topsOrtho from the menu bar.
2. Click Practice Setup...
3. Enter your password.
4. Click Tx Notes tab.
5. Modify according to your clinical protocol.
6. Close the Treatment Notes.

Summary

In this lesson, you should feel confident with:

- Conducting the clinical exam
- Importing images
- Customizing your clinical procedures
- Customizing your treatment notes

Lesson 15 Introduction to the 3D Tooth Chart

Lesson Fifteen Overview

This lesson focuses on introducing the tooth chart.

Objectives:

To become familiar with the view and action menus, you will:

15A Introduction to Tooth Chart Set up
Discuss each.

15B Introduction to the Functionality of the Tooth Chart
Discuss each.

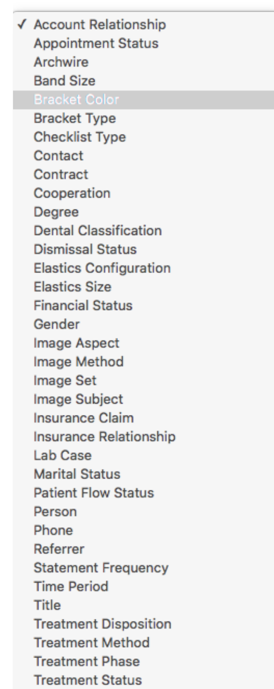
15A Tooth Chart Set up

The topsOrtho 3D tooth chart is used to record orthodontic treatment. The tooth chart begins as a blank slate for each patient. You'll place brackets and elastics to match the patient's current orthodontic situation. At each appointment, you should update the tooth chart to reflect bracket and elastic changes. As you move through past treatment notes, changes will be shown on the tooth chart. You can customize brackets and elastics types and colors, display brackets, lingual buttons and elastics on the tooth chart, remove teeth, and email or print images from the tooth chart.

Practice Setup: Bracket Color

You will need to choose a color for each bracket type used in your practice. The color will display on the tooth chart. To add or edit, follow these instructions:

1. Go to Practice Setup: Labels.
2. From the Label Type drop-down menu, select Bracket Color.
3. To add, click the plus (+) button.
4. Click within the label area and enter the bracket color label.
5. Click the colored rectangle and choose a color for the label.
6. Click the Edit Label button if you need to change or correct a label.
7. A warning displays if the label is in use. If you change a color, it will affect all associated records.



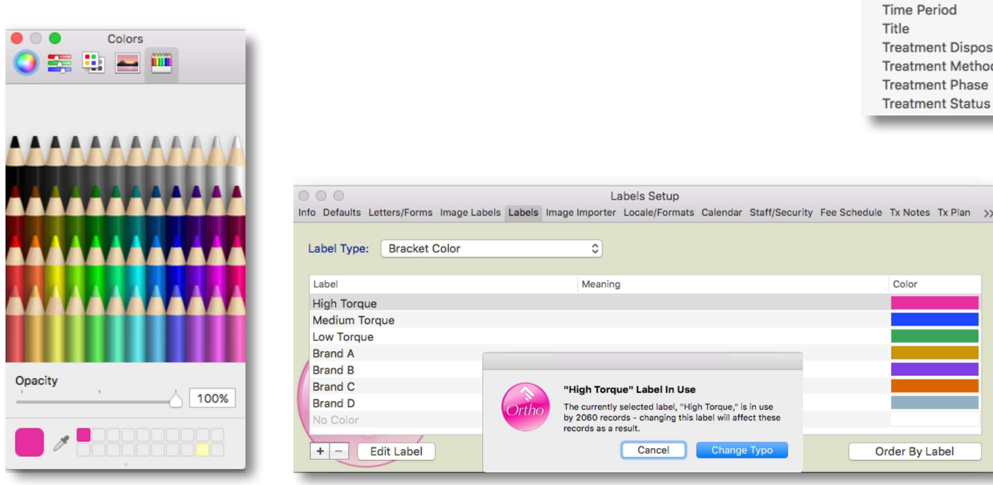


Figure 15-1: *Bracket Color*

Practice Setup: Elastic Size

The elastics displayed should reflect the elastics currently used in your practice. To add or edit, follow these instructions:

1. Go to Practice Setup: Labels.
2. From the Label Type drop-down menu, select Elastic Size.
3. To add, click the plus (+) button.
4. Click within the label area and enter the elastic type or size.
5. Click the colored rectangle and choose a color for the label.
6. Click the Edit Label button if you need to correct a label.
7. A warning displays if the label is in use. If you change a color, it will affect all associated records.

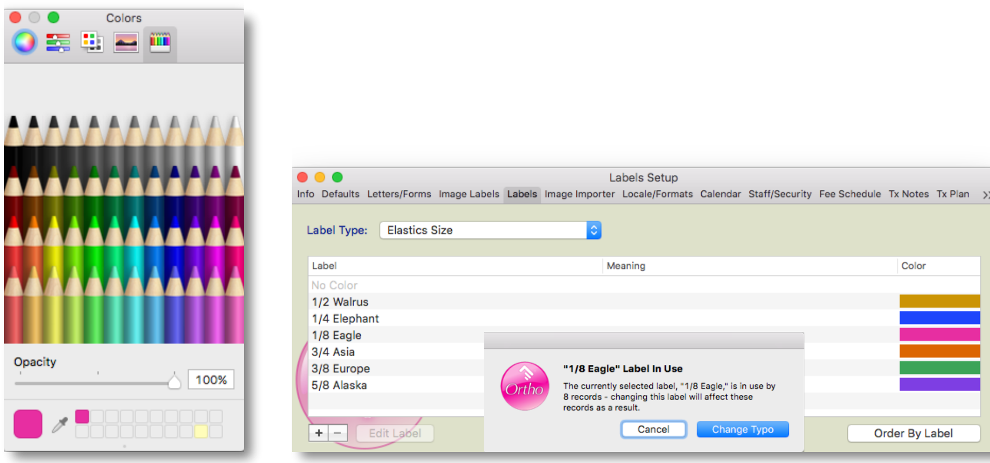


Figure 15-2: *Elastic Size*

Practice Setup: Elastic Configuration

The elastics in this list are the names of elastic configurations you created before the update to topsOrtho v5.0. You will set up name elastics directly from the tooth chart and those names will appear on the list. You will set up elastic configurations for commonly used individual elastic configuration, but do not use right and left combinations. Once you name elastics on the tooth chart, you can quickly select the elastic configuration and it will be placed on the model. To add or edit configurations, follow these instructions:

1. Go to Practice Setup: Labels.
2. From the Label Type drop-down menu, select Elastic Configuration.
3. To add, click the plus (+) button.
4. Click within the label area and enter elastic configuration labels for each commonly used elastic used in your practice.

5. Click the Edit Label button if you need to correct a label.
6. A warning displays if the label is in use. Be aware that if you change a label, it will affect all associated records.
7. You can drag to reorganize the labels, such as placing the most commonly used labels at the top of the list.

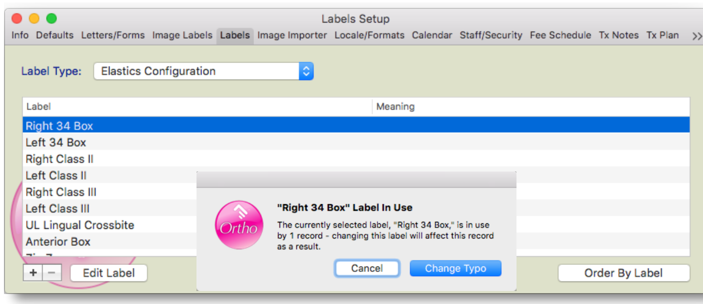


Figure 15-3: *Elastic Configuration*

15B Using the Tooth Chart

Open a patient in the clinical view. The Tx Notes + radio button will be selected and the tooth chart will be visible. The tooth chart will be in the upper half of the window, treatment notes in the lower half, and the clinical case drawer opens to the left and displays the case information. This drawer can be closed or opened by clicking on the drawer icon.

The Elastics size and configuration fields are gone. You now select the brackets and place elastics on specific teeth. This is great if you use several bracket types and various elastic configurations on a patient.

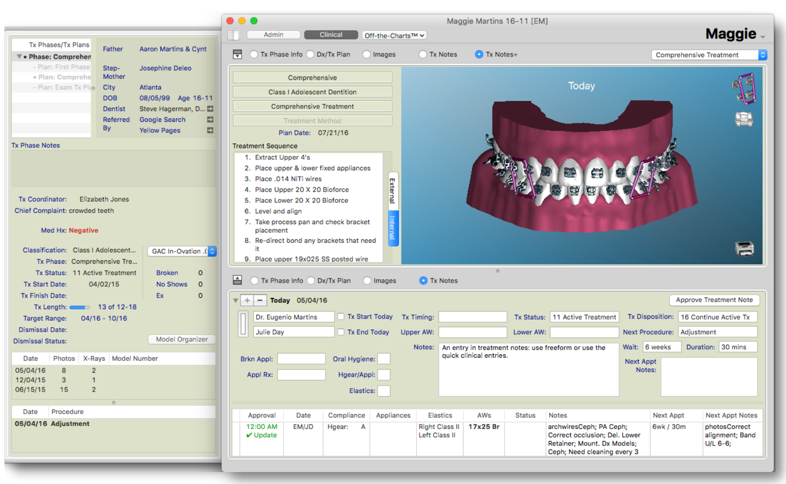


Figure 15-4: *Tooth Chart Clinical View*

Viewing the tooth chart

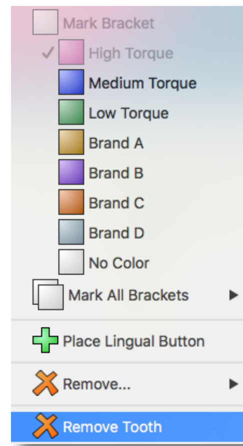
1. Double-click the tooth chart to view in full screen mode.
2. To exit the full screen view, double-click again on the tooth chart or press the esc key.

Manipulating the tooth chart

1. Place your mouse anywhere on the tooth chart and drag right or left to the desired position. Dragging up or down opens or closes the model.
2. Press the right, left, up or down arrow on your keyboard.
3. You can also use the trackpad on a laptop.

Removing or replacing a tooth

1. From the tooth chart, right-click on the tooth to be removed and select Remove Tooth.
2. To replace the tooth, right-click on the tooth chart and select Place Tooth.



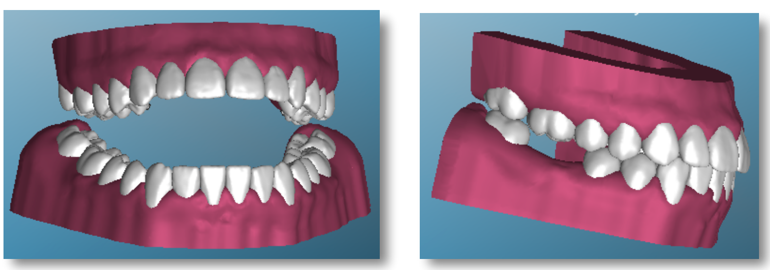


Figure 15-6: *Removing a Tooth*

Placing, changing and removing brackets

1. To place all brackets, select the Bracket icon and left-click on the tooth where you want to start. You can also right-click directly on the tooth chart.
2. From the contextual menu, select Place All Brackets and the bracket type.

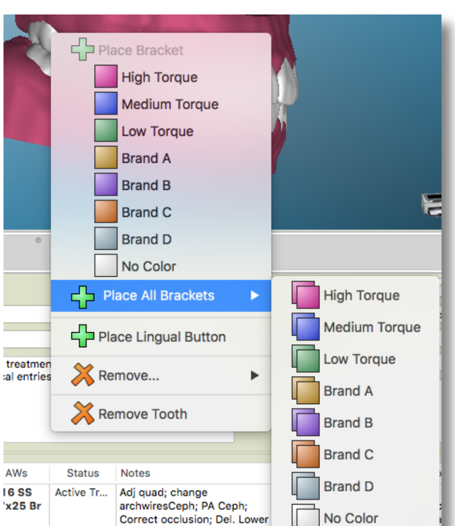
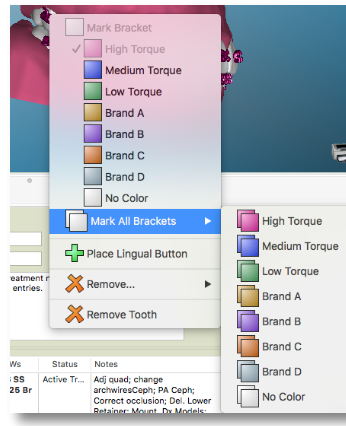


Figure 15-5: Placing Brackets

3. If you are adding brackets individually, right-click the tooth, chose the bracket type, and quickly click each tooth. You have 1.5 seconds to click each tooth. If you delay during placement, select the bracket type again and continue placing the brackets.
4. To change an individual bracket, right-click, and from the contextual menu choose the new bracket type.
5. To change all brackets, right-click and select Mark All Brackets and chose the new type.
6. To remove brackets, right-click and select Remove... and Bracket or All Brackets.
7. To remove a brackets or all brackets, right-click on the tooth and select Remove Bracket or Remove All Brackets.

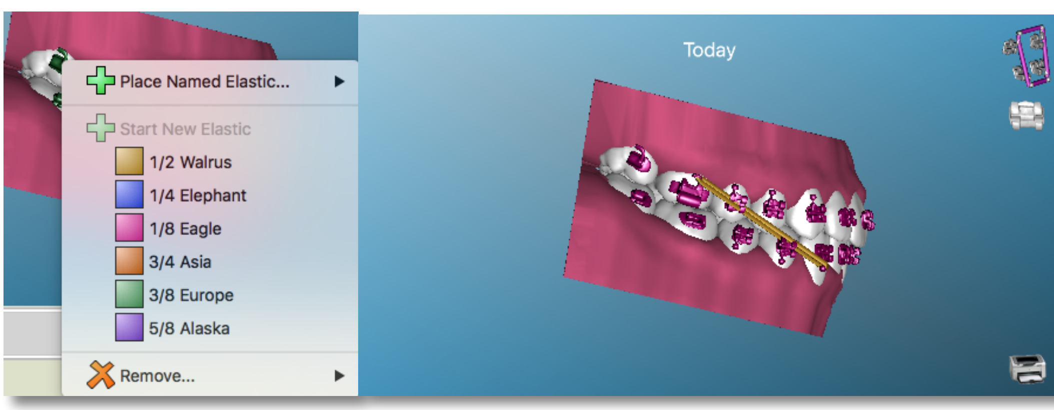


You can have multiple bracket types for each patient. You can use these colors to show brackets with torque, ceramic brackets or other esthetics. The colors can represent anything. Just be sure to name them in Practice Setup.

Placing, changing and removing elastics

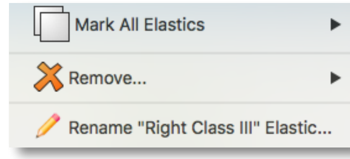
1. Select the Elastics icon or left-click on the tooth where you want to start elastics.
2. Click the bracket where the elastic will begin.
3. From the contextual menu, chose the elastics type and the bracket will begin to blink.

Figure 15-7: *Placing Elastics*



4. Click the next bracket where the elastic will connect. If you're making a box or triangle, click all the brackets where the elastic attaches.
5. To finish, quickly click the bracket where the elastic began, forming a loop. Remember, you must close the loop.

6. To change the elastics type, click the elastic, select Mark All Elastics and choose the new elastic type.
7. To remove elastics, click the elastic, select Remove... and choose Remove Elastic or Remove All Elastics.



Naming elastic configurations

In most offices, there are common elastic configurations used for many patients. As long as these configurations are always placed on the same teeth, they can be saved by naming them. This will make it unnecessary to redraw these elastics in the future.

1. After placing an elastic, left-click and from the contextual menu select Name This Elastic...

Figure 15-8: *Naming Elastics*

2. From the drop-down sheet, select the corresponding elastic configuration name. If there is a checkmark in the In Use column, that elastic is already associated with another elastic configuration.

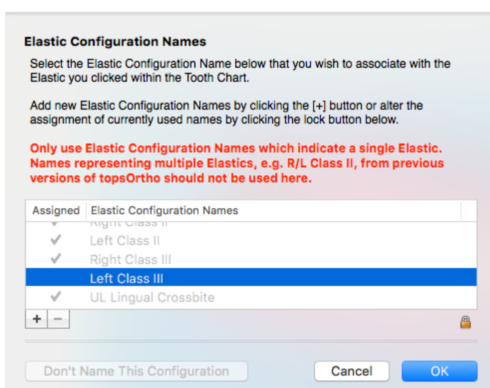


Figure 15-9: *Naming Elastics*

3. To add a new elastic configuration, from the drop-down sheet click the plus [+] button and enter the configuration name. Click OK when done.

4. After elastic configurations are named, they are associated with that specific configuration for future use. The next time you need that elastic, simply left-click on the tooth chart, select Place Named Elastic... and choose the elastic configuration. The configuration will be drawn automatically on the tooth chart.

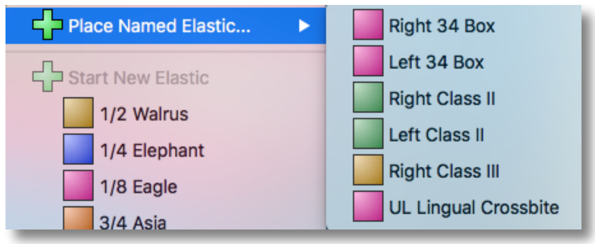


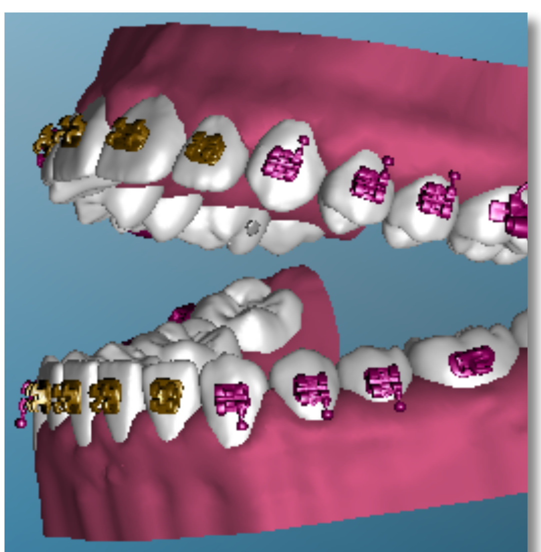
Figure 15-10: *Naming Elastics*

5. If the wrong elastic configuration was selected initially or there was a clinical protocol change, you may need to change the associated elastic configuration. To do this, left-click and choose Name This Elastic... and click the lock. From the list, choose the correct elastic configuration. Click OK when done. You will be prompted to enter your password (this privilege must be assigned in Practice Setup).

Any editing to the actual elastic configuration label (changing label name or spelling) must be done in Practice Setup. Also, labels cannot be deleted once created.

Placing and removing lingual buttons and crossbite elastics

1. To place the button, right-click the tooth and from the contextual menu select Place Lingual Button. Open the model to view.



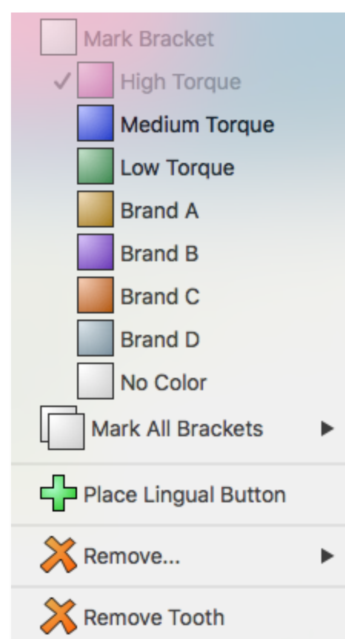


Figure 15-11: *Placing Lingual Buttons*

2. To place a crossbite elastic, left-click the lingual button area. From the contextual menu, select the elastic type and click the attachment tooth. Finish by clicking the lingual button again to close the loop. If this is a common elastic, click the elastic on the tooth chart again to name it.

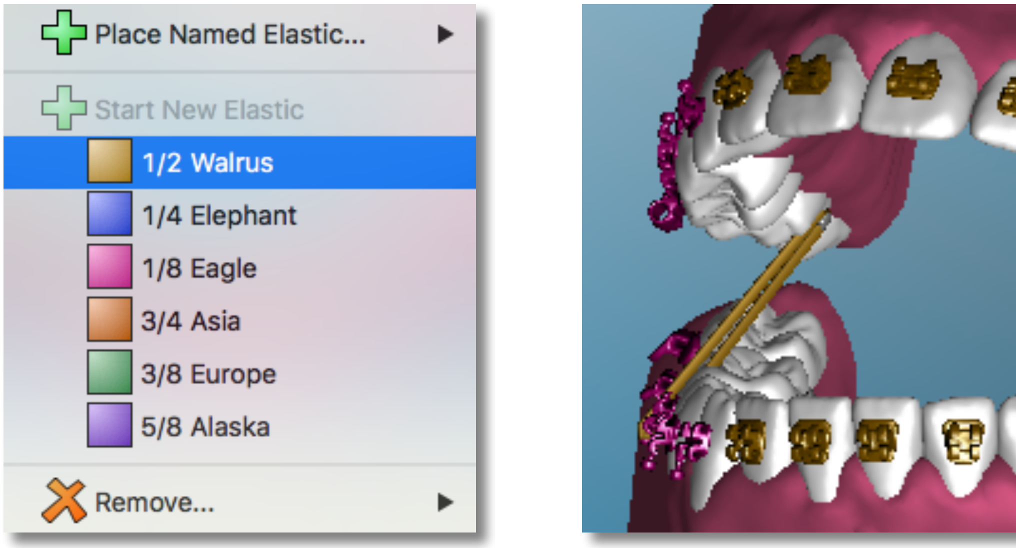


Figure 15-12: *Placing Crossbite Elastics*

3. To remove the lingual button, right-click the button and select Remove Lingual Button. If an elastic was attached, it will be removed.

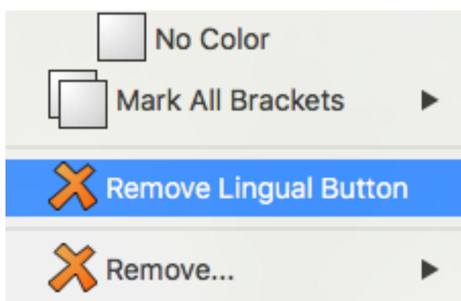


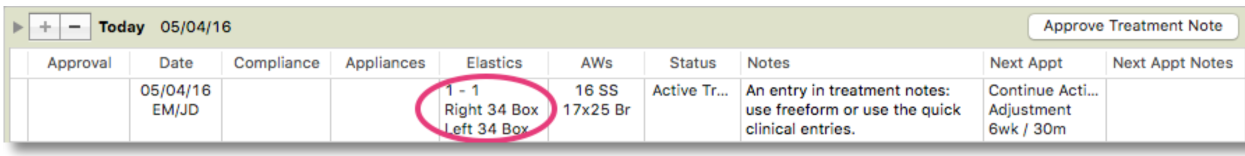
Figure 15-13: *Removing Lingual Buttons*

Viewing elastic information in treatment notes

After rollover has occurred, the Elastics column shows the number of elastics prescribed per segment and each named elastic.

For simplicity's sake, elastic segments are broken into 3 areas: patient's right side, both (elastic crosses over from right to left) and patient's left side. In the treatment note shown below, the 1 1 - means there is one elastic on the right side, one elastic in both areas (midline elastic), and the dash indicates no elastic on the left side.

If the elastics are named, the names are shown below the number information in the treatment note. If more than two elastics are placed, hover your mouse over the elastics column and a pop-over will display all the named elastics placed on your patient.



Approval	Date	Compliance	Appliances	Elastics	AWs	Status	Notes	Next Appt	Next Appt Notes
	05/04/16 EM/JD			1 - 1 Right 34 Box Left 34 Box	16 SS 17x25 Br	Active Tr...	An entry in treatment notes: use freeform or use the quick clinical entries.	Continue Acti... Adjustment 6wk / 30m	

Figure 15-14: *Viewing Elastics in Treatment Notes*

Printing or emailing from the tooth chart

1. From the tooth chart, click the Printer icon.
2. A page will open with frontal and buccal views from the tooth chart. If elastics are placed, they will also be shown.
3. From the menu bar, select File and Print... or Email...
4. If you select Email…, a sheet will display. Select the appropriate email address and an email will be created.

This may be stating the obvious, but your Mail.app must be set up in order for emailing to work.

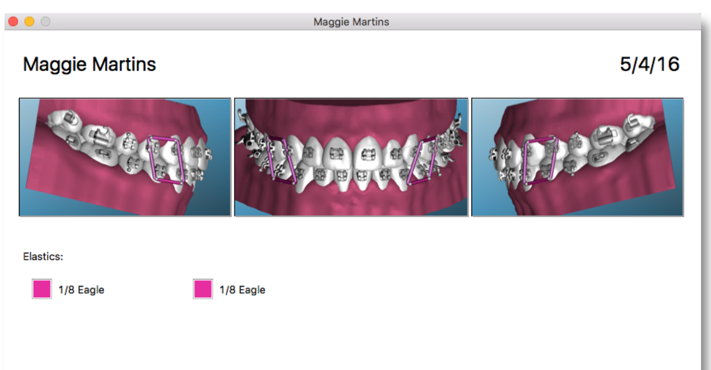


Figure 15-15: *Printing or emailing Elastics*

Summary

In this lesson, you should feel confident with:

- Configuring the Tooth Chart
- Using the Tooth Chart

Lesson 16 Treatment Plans and Phases

Lesson Sixteen Overview

This lesson will explain in detail the difference between treatment plans and phases and when each should be used.

Objectives:

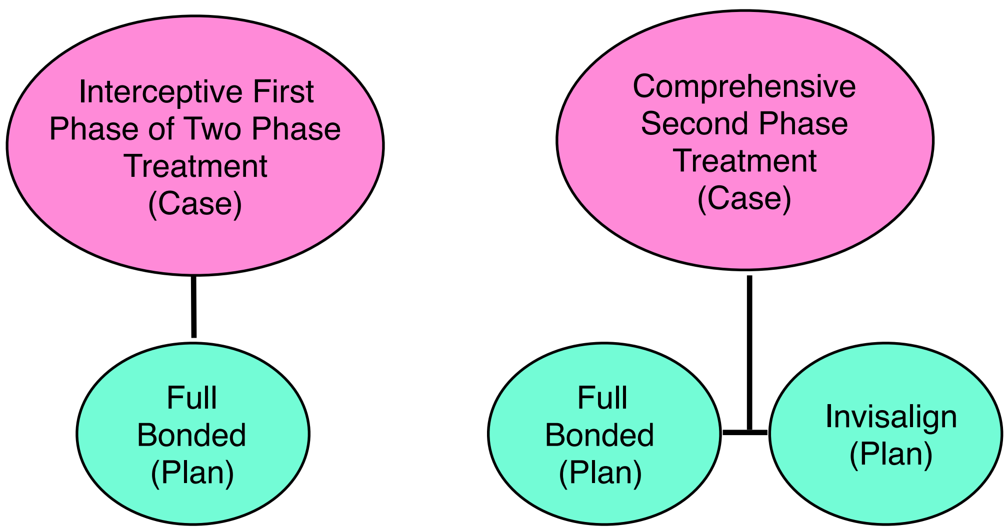
To become familiar with the schedule template, you will:

16A Gain a better understanding of treatment plans and phases

topsOrtho allows you to store several cases and treatment plans for a patient.
Think of a *treatment case* as the type of treatment you are offering the patient, and the *treatment plan* as the roadmap for how you will accomplish this goal.

A treatment phase is one of the following options (these cannot be changed).

Full List of Treatment Categories/Phases
- Comprehensive Treatment
- Interceptive First Phase of Two-Phase Treatment
- Comprehensive Second Phase Treatment
- Comprehensive Surgical-Orthodontic Treatment
- Limited Treatment
- TMD Treatment (Temporomandibular Disorder Treatment)
- Fixed Habit Appliance
- Monitor Development



Example:
After thorough examination of a 10-year-old child, you determine that she will need two phases of treatment. Phase I will start with a full bonded treatment to correct spacing problems. After Phase I treatment is finished, you decide she is ready for Phase II. Do not enter the patient's new diagnosis into her Phase I case. Instead, create a new phase for her Phase II treatment. This Phase II treatment may also consist of more than one plan, according to the patient's wishes.

There are a few items that you need to be made aware when working with different phases in topsOrtho.

- You can only have one <u>active</u> phase at a time.
- You can only have one <u>active</u> treatment plan within a phase, although you can create as many plans (treatment options) as you wish.
- An active treatment plan has it's own contract.
- A patient's images are saved within a phase. You can have initial and final images for Phase I and initial and final images for Phase II. Only the active phase images can be viewed in the browser. You do have the ability to make previous phases active temporarily to view or print those images.
- You can not delete a treatment plan or a phase once they are created.

16A Treatment Plans

All patients are created in topsOrtho with the default Treatment plan information as "Untitled Treatment Plan." This is displayed in the Clinical View. You will want to change the name of the Tx Plan.

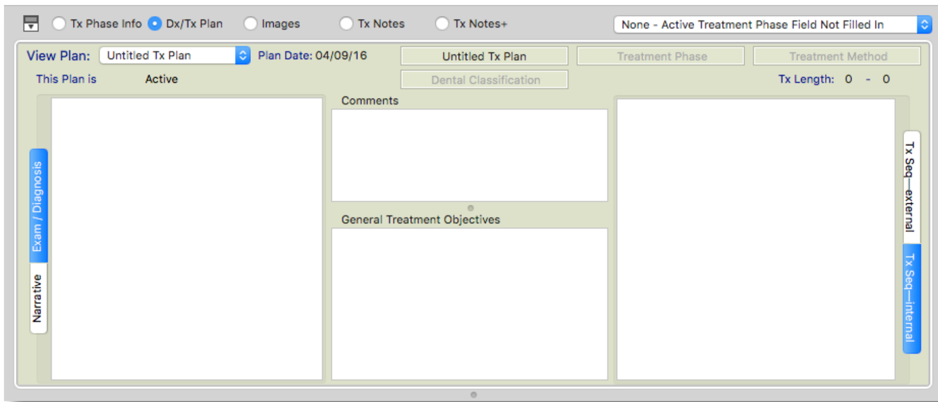
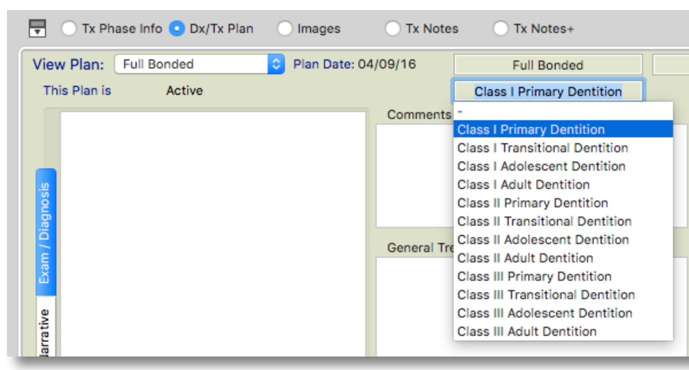
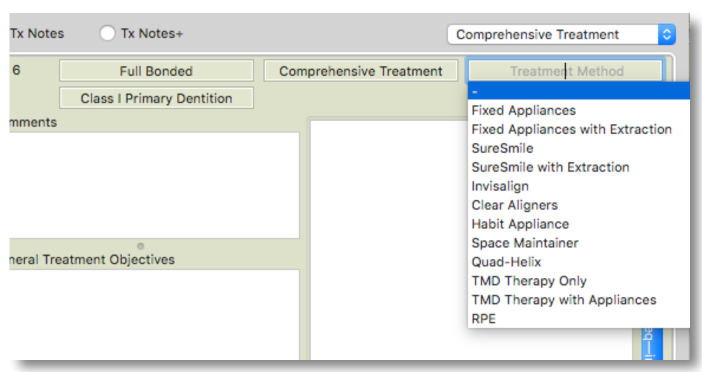


Figure 16-1: Treatment Phase

1. Click Clinical View.
2. Click Dx/Tx Plan radio button.
3. Click in the Tx Plan text box and rename the Tx Plan.
4. Tab to the Dental Classification field. Select the appropriate Classification
5. Tab to the Treatment Phase field. Select the correct phase of treatment.
6. Tab to the Treatment Method. Select the appropriate method. You can customize Tx Methods in Practice Setup, Labels. Methods should not overlap. A patient cannot be in two (or more) methods simultaneously (i.e., SureSmile and Fixed Appliances with Extractions) if they can, a method is necessary for all the variables (i.e., SureSmile Fixed Appliances with Extractions and SureSmile Fixed Appliances without Extractions).





Creating and Activating a Second Phase

Creating a new phase and treatment plan will keep your prior treatment unchanged as part of the patient's permanent record. The first phase will be available for viewing but will not be the active phase.

1. Click Clinical View.
2. Click Case Info radio button, if required.
3. Click in the Active Phase Name box.

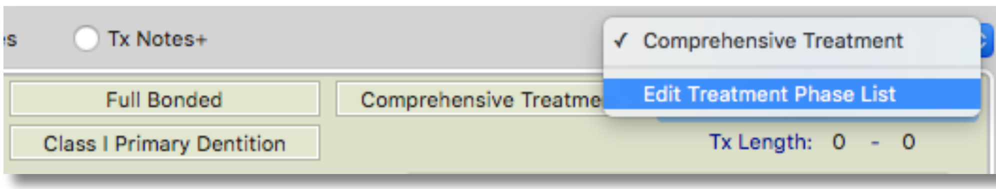


Figure 16-2: *Active Phase Name*

4. Click Edit Treatment Phase List.

Figure 16-3: *Edit Treatment Phases*

5. Click the Plus (+) symbol in the lower left corner.

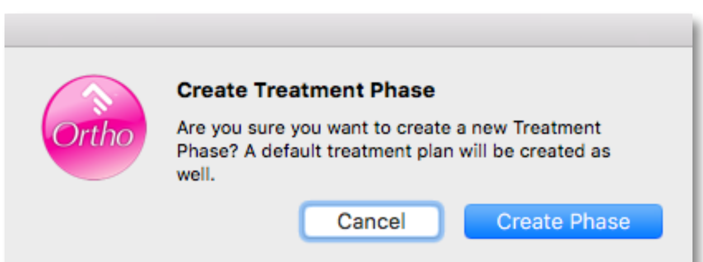


Figure 16-4: *Create Treatment Phase*

6. Click Create Phase. None is the default name of the Phase. **Verify that there is a check to the left of the new phase. This indicates that the phase is active.** The name of the phase will continue to be None until it is changed in the Treatment Phase field, as discussed above.

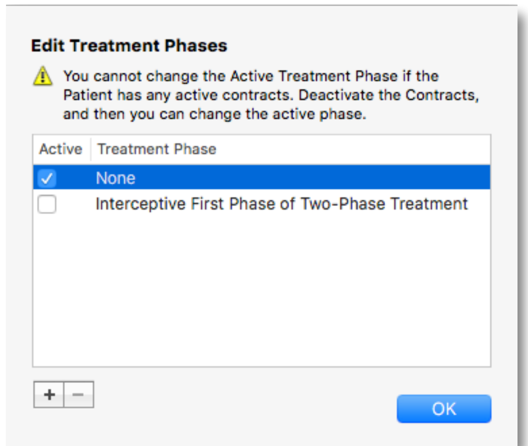


Figure 16-5: *Newly created Phase*

7. Click OK.
8. Drag across the Untitled Tx Plan and enter an appropriate name.
9. Tab to select the other necessary fields, Phase, Classification, Method.

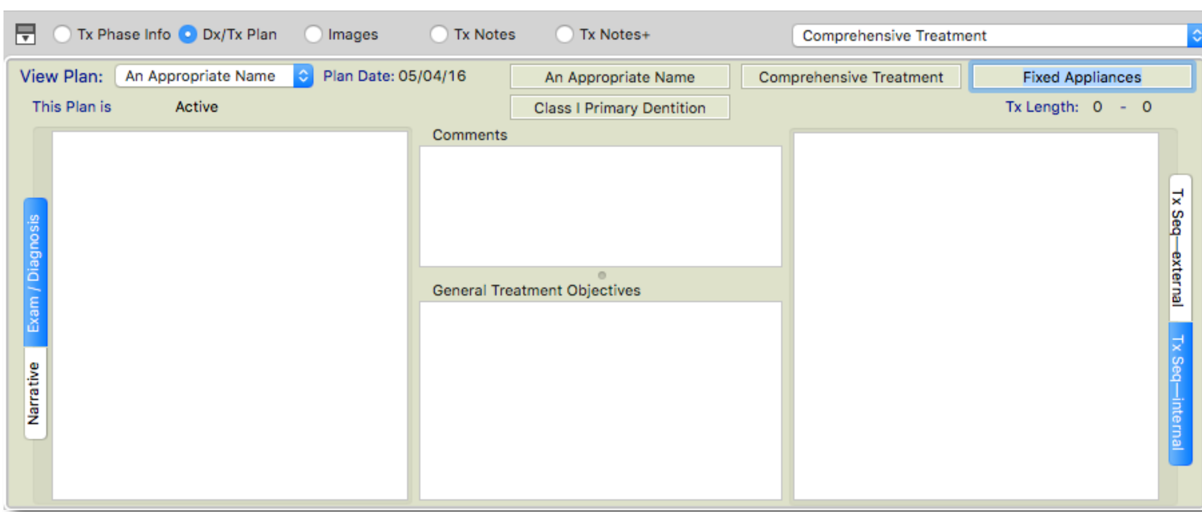


Figure 16-6: *Newly Created Phase*

10. Enter the information for the new treatment plan as usual.

Creating an Additional Treatment Plan for an Active Phase

There will be times when you want to create an additional treatment plan for a patient, for example, a Full Bonded treatment plan and an Invisalign treatment plan.

1. Click Clinical View.
2. Click Dx/Tx Plan radio button.
3. Click in the View Plan text area.

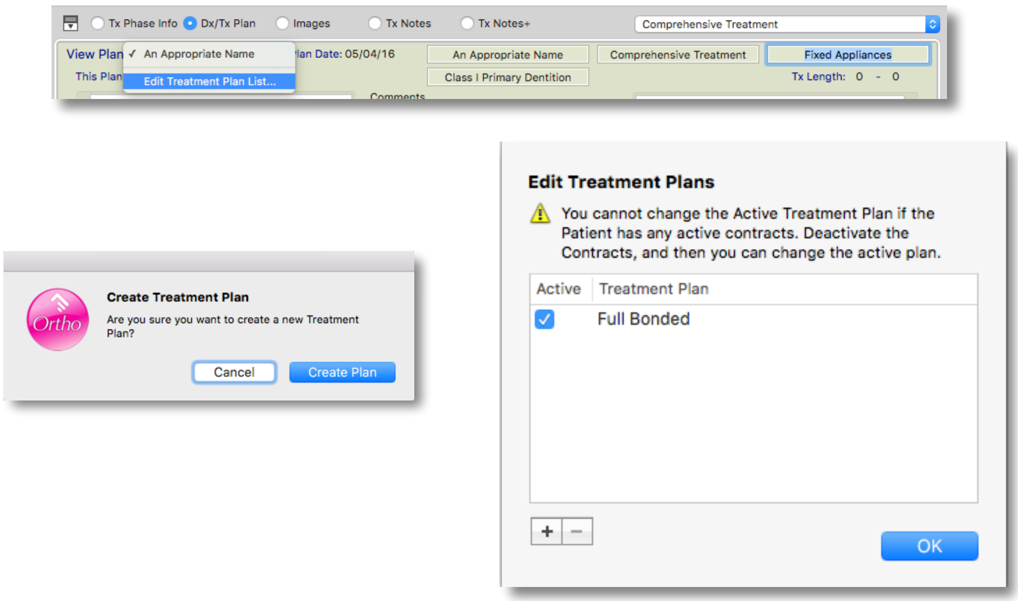


Figure 16-7: *Edit Treatment Plan*

4. Click the Plus (+) symbol in the lower left corner.
5. Click Create Plan.

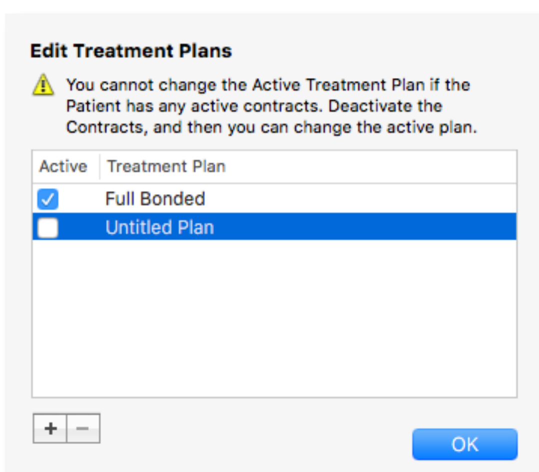


Figure 16-8: *Newly Created Treatment Plan*

6. Click the checkbox to the left of the Untitled Plan. This indicates that the new plan is the active treatment plan.

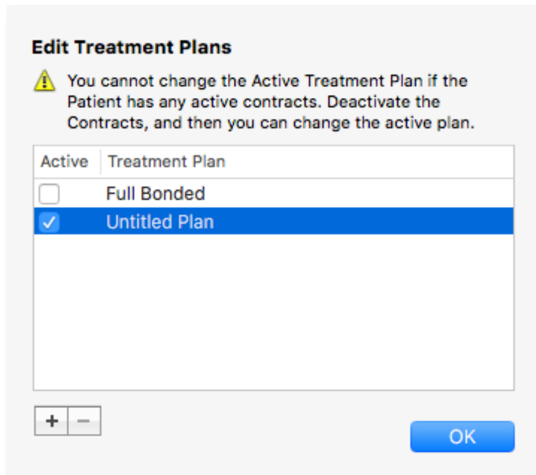


Figure 16-9: *Active Treatment Plan Indicated*

7. Click OK.
8. Drag across the name of the plan and enter the appropriate name.

Figure 16-10: *Selected Treatment Plan*

9. Tab to enter the Classification, Phase, and Method.
10. Press the Tab to finish the process.

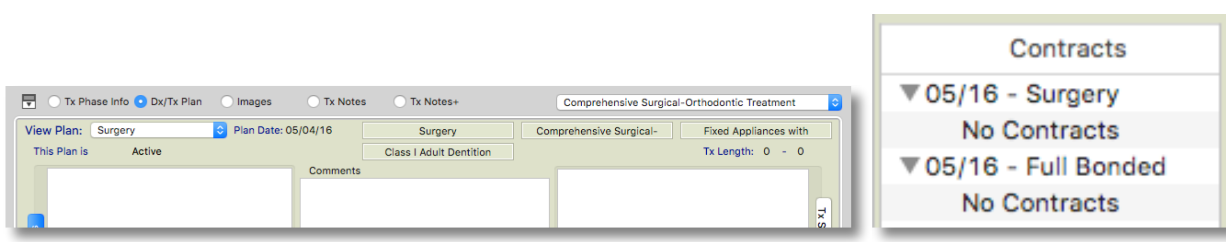


Figure 16-11: *Three Treatment Plans for one Phase*

Summary

In this lesson, you should feel confident with:

- Understanding the difference between Cases and Plans
- Understanding when to use each
- Add and edit Cases and Plans

Lesson 17 Schedule Templates

Lesson Seventeen Overview

This lesson focuses on creating procedures and groups and assigning them to your schedule templates. You will also create holiday templates.

Objectives:

To become familiar with the schedule template, you will:

17A Define your Calendar defaults
Select the appropriate options for the Appointment Book.

17B Customize your procedures
topsOrtho has built-in procedures available for use, and you can customize those used in your practice.

17C Customize your groups
After creating procedures, you'll want to create groups for easy searching in your Appointment Book.

17D Procedure Intervals
A future topsOrtho program enhancement.

17E Creating Templates
Create customized appointment blocks for your calendar.

17A Calendar (Appointment Book) Defaults

You will want to select the way your calendar works when it displays and chooses appointments. Selecting the appropriate defaults allows you to use the Appointment Book effectively. There are five sections that should be customized so your appointment book reflects the way your office runs:

General–Security and days of the week.
Clinical Procedures–Customize your clinical procedures.
Procedure Group–Arrange your clinical procedures into customized groups.
Procedure Intervals–Specify time length between specific appointments.
Schedule Templates–Design templates for use in your practice.

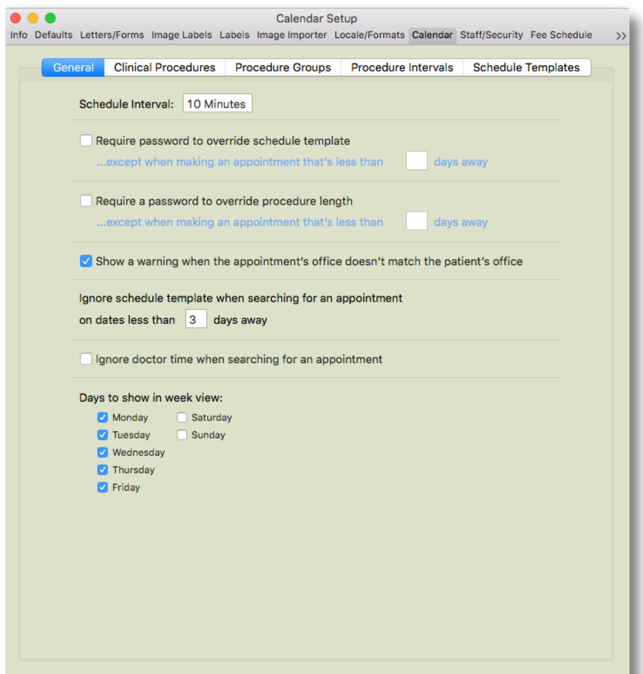
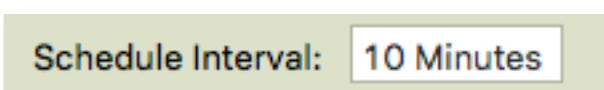
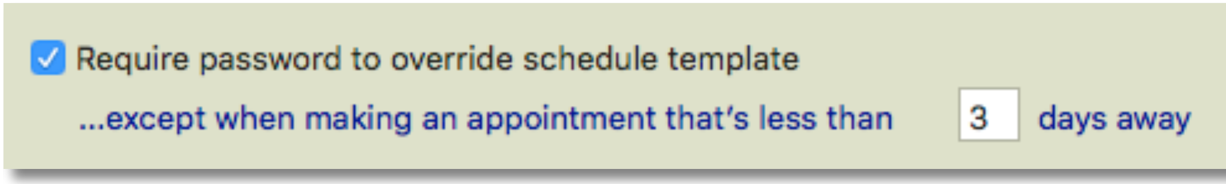


Figure 17-1: *Calendar Set up options*

General Calendar Defaults

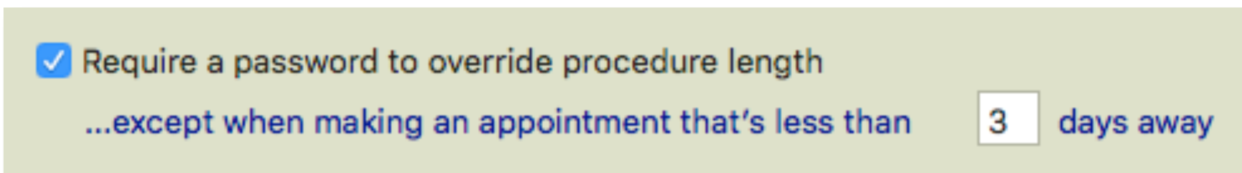


You can select the time interval that you want displayed on your calendar. Five minutes is the smallest time increment available. You can select 10 and 15 minute intervals, depending on how your practice schedules procedures.



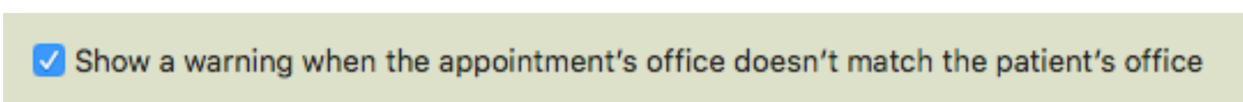
By checking this option, the person scheduling the appointment must enter a password if the appointment they want to schedule is greater than the number of days entered.

Example: If you're trying to schedule an emergency appointment in a Consult time slot for this afternoon, the person scheduling the appointment would not have to enter a password to add the appointment to the calendar.

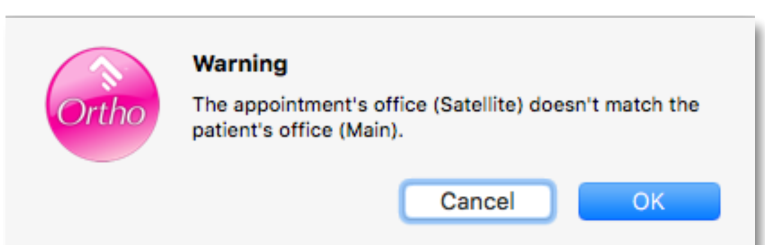


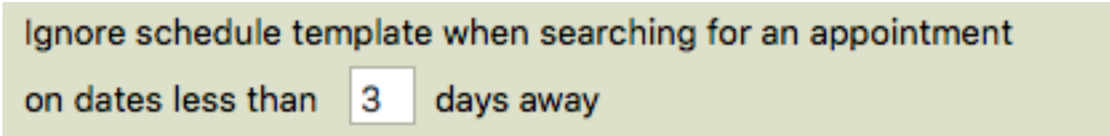
When this option is checked, the scheduler must enter a password if she attempts to override a procedure's designated length, assuming the appointment is further away than the number of days designated.

Example: You are trying to book an adjustment appointment. The normal length of such an appointment is 30 minutes, but the doctor has asked for additional time with the patient. If you try to schedule 40 minutes, you do not need to provide a password if the appointment is less than the number of days designated in the box.

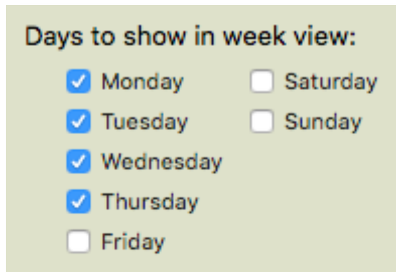


If a patient has been assigned to a specific practice or satellite office, topsOrtho will display a warning if you try to schedule the patient for a different office.





topsOrtho will ignore the schedule template and allow you to search and book a different procedure group appointment if it is less than the number of days displayed. This is possible as long as the appointment length is available on the calendar. This allows you to fill the calendar on short notice.



What days would you like displayed on your appointment book? Check the days that you are open and available for patients.

17B Customizing Appointment Types

topsOrtho allows you to create and name procedures according to what is familiar to you. One practice might “band” patients, while another “bonds.” You can also customize what happens before and after an appointment: designate a specific appointment to notify the Treatment Coordinator, count as a New Patient Exam or Begin/End Treatment. Doctor time is also allotted in the Clinical Procedures setup.

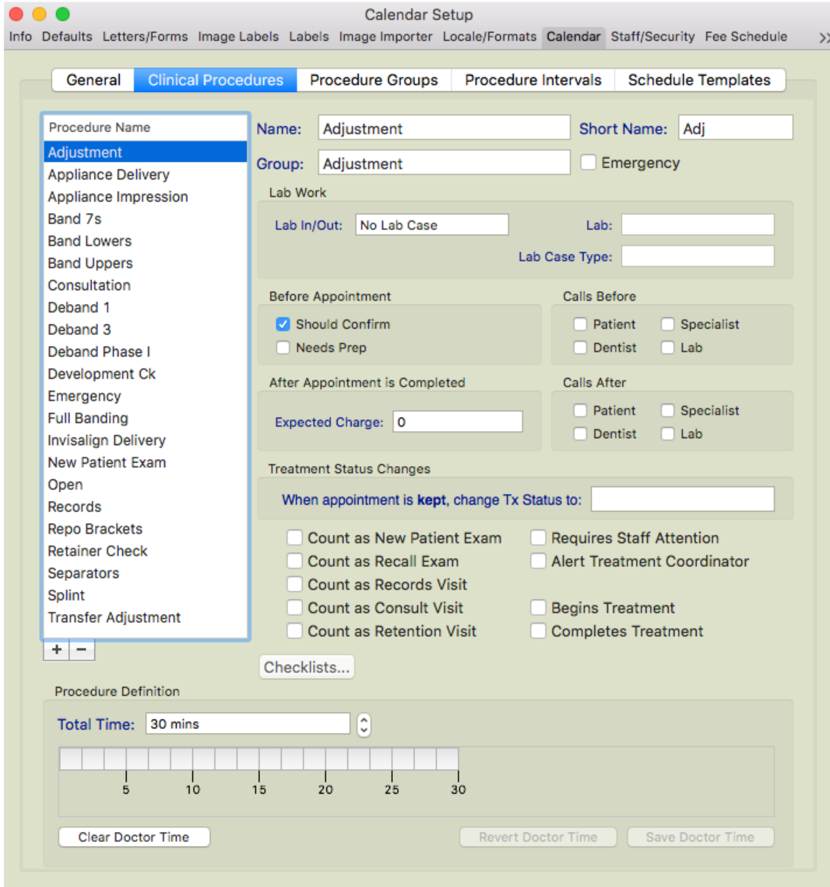
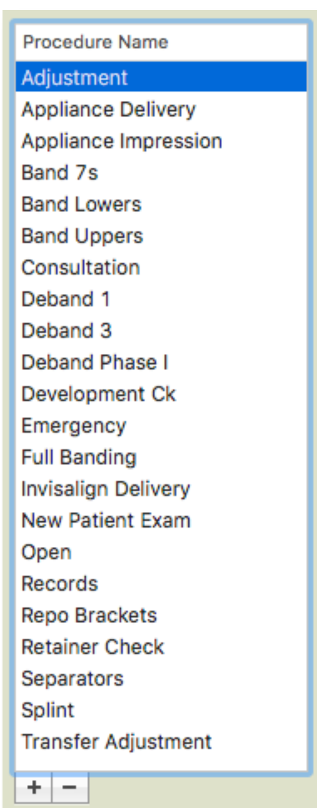
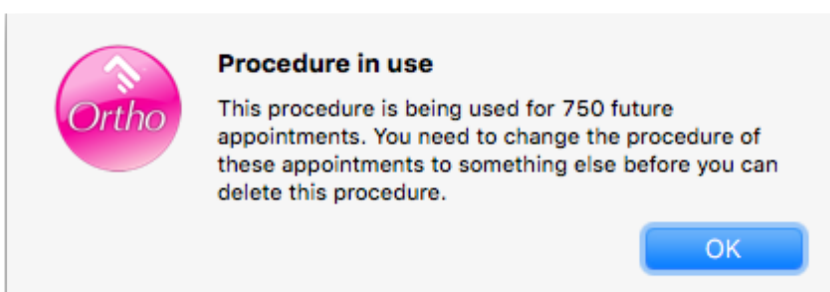


Figure 17-2: *Clinical Procedures*



Procedure Name - This contains all of your practice's procedures. You can add as many procedures as your office protocol requires by clicking on the + (plus) button at the bottom. You can also delete a procedure by clicking on the - (minus) button. If the procedure has been used for a future appointment, however, you will receive a warning and will not be able to delete it unless you find the patient and change that procedure.

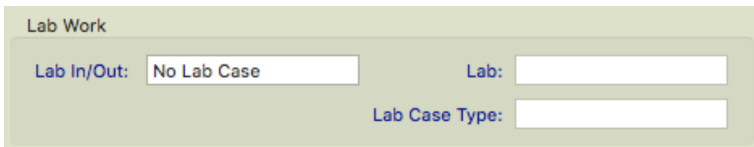


Name–The desired name of the procedure.

Short Name–Displayed on the Appointment Book.

Group–The group to which this procedure belongs. (We will assign groups in the next topic.)

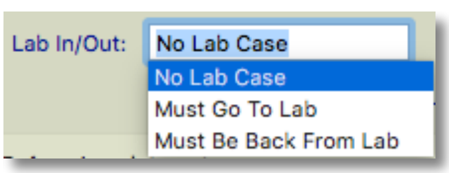
Emergency–Check the Emergency box if the appointment type always reflects an emergency. topsOrtho keeps track of emergency appointments.

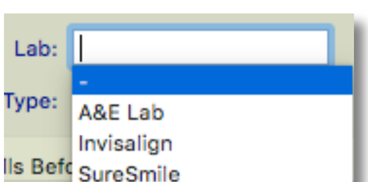


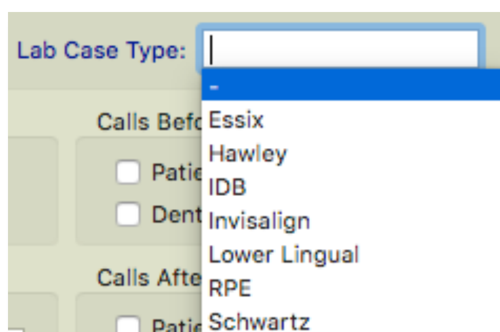
Lab In/Out–Designates if a procedure requires any lab work, either in your practice or elsewhere.

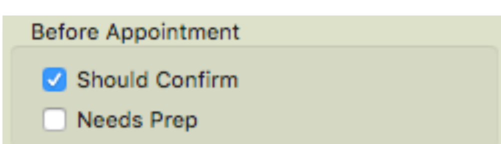
Lab–Select from a list the lab you will use to perform the work. The lab choices come from the referrers you created and designated the category as an Ortho Lab. The Ortho Lab name must be placed under the Company field when you created the referrer.

Lab Case Type–The Lab Case Type comes from Lab Work Labels in topsOrtho practice setup.









Before Appointment–Should the appointment be confirmed by a courtesy call? Does any preparation need to be done before the patient arrives, e.g., bracket set? Check the boxes if appropriate.

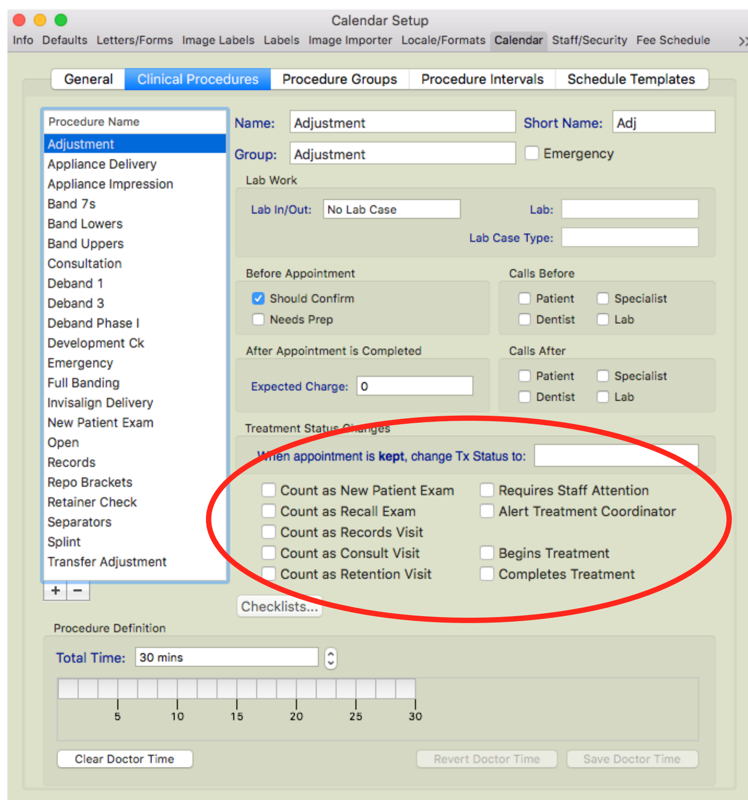
After Appointment is Completed - When you fill in any charges, they will appear on the report "Appointment Charges for Today," and in the patient's appointment information window.

Calls Before - Check the appropriate boxes if the appointment requires a call before.

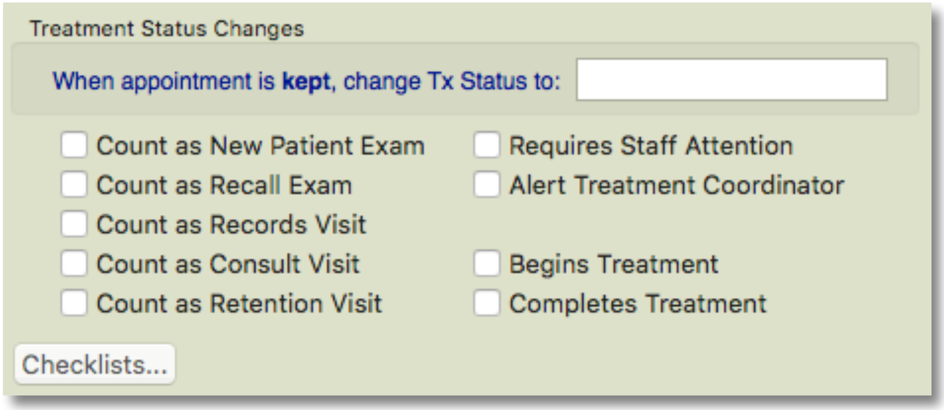
Calls After - Check the appropriate boxes if the appointment requires a call after.

Link Procedures and Treatment Statuses. You want to do this so the Treatment Status will change when the patient checks in. Here's how:

1. From Practice Setup..., select ***Calendar*** and ***Clinical Procedures.***
2. From the Procedure Name list, click on a ***Procedure***.
3. At the center of the window, click in the ***When appointment is Kept, change Tx Status to: box***.
4. From the list, select the associated ***Treatment Status.***
5. Verify the checkboxes below the Treatment Status are checked to track if the appointment counts as a New Patient Exam, Alerts the Treatment Coordinator, Begins, Completes Treatment, etc.
6. Make sure Emergency Appointments have the ***Emergency checkbox*** checked, too.



The Tx Status will change when the patient checks in for their appointment and display in the Tx Notes section in red. Be sure to check statuses at each patient's appointment.



Count as New Patient Exam, Recall Exam, Records Visit, Consult Visit, Retention Visit - Counts appointments as the specified exam or visit.

Requires Staff Attention–If a patient needs to check in with the front desk upon arriving (for example, to complete paperwork for a new patient exam), check this box and it will appear on the CheckIn monitor.

Alert Treatment Coordinator–Check this box if the treatment coordinator needs to be alerted via Patient Flow that the patient has arrived.

Count as New Patient Exam–Check this box if the procedure is to be counted as the New Patient Exam. topsOrtho will track how many New Patient Exams you've had each month if this is appropriately marked.

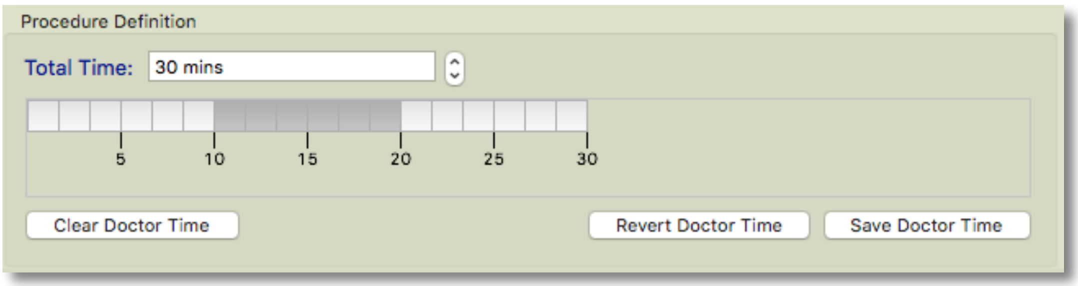
Begins Treatment–Check this box if the procedure begins treatment and topsOrtho automatically fills in the start date of the patient's treatment once this procedure has taken place.

Completes Treatment–Check this box if the procedure completes treatment and topsOrtho automatically fills in the end date of the patient's treatment once this procedure has taken place.

Checklists–Click this button to link procedures and checklists. If you want a certain procedure to generate a checklist (i.e. New Patient Exam gets Medical History Checklist). Checklists will be created for patients of selected procedure types at rollover the night prior to their appointment.

Be sure to check the correct checkboxes for accurate analytics.

Total Time - The total time allotted for the procedure. The time bar reflect the length in minutes.



Doctor Time–If you choose to use Doctor Time, be aware that topsOrtho will ***never*** overlap doctor time, no matter how many columns are in the calendar. If you do not use doctor time, topsOrtho will search for appointments according to the length and group only. The scheduler should always check the calendar so as not to overbook the doctor.

Even if your office does not use doctor time, you must click Save Doctor Time to save the procedure time definition.

Clear Doctor Time: Delete any doctor time. Doctor time is indicated by the filled in square.

Revert Doctor Time: If you add or take away doctor time, you can go back to the original time as long as you have not saved it.

Save Doctor Time: Save the designated doctor time you have checked.

17C Customizing Appointment Groups

topsOrtho searches for appointments by group. As you've seen on the Appointment Book, a background indicates the type of procedure that can be scheduled for specific times and days. Each group can contain many procedures. When you book an appointment, topsOrtho searches for the group where the appointment is and lists the available time slots. You can create or modify as many groups as your office protocol dictates, as well as creating your own color scheme.

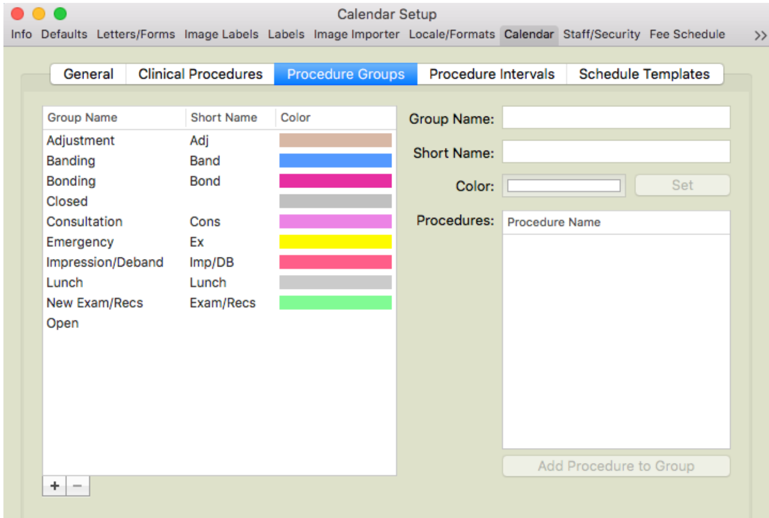


Figure 17-3: *Procedure Groups*

The left side of the window indicates the default Group Names, along with the associated color that is displayed on the calendar. You can add or delete the group as required.

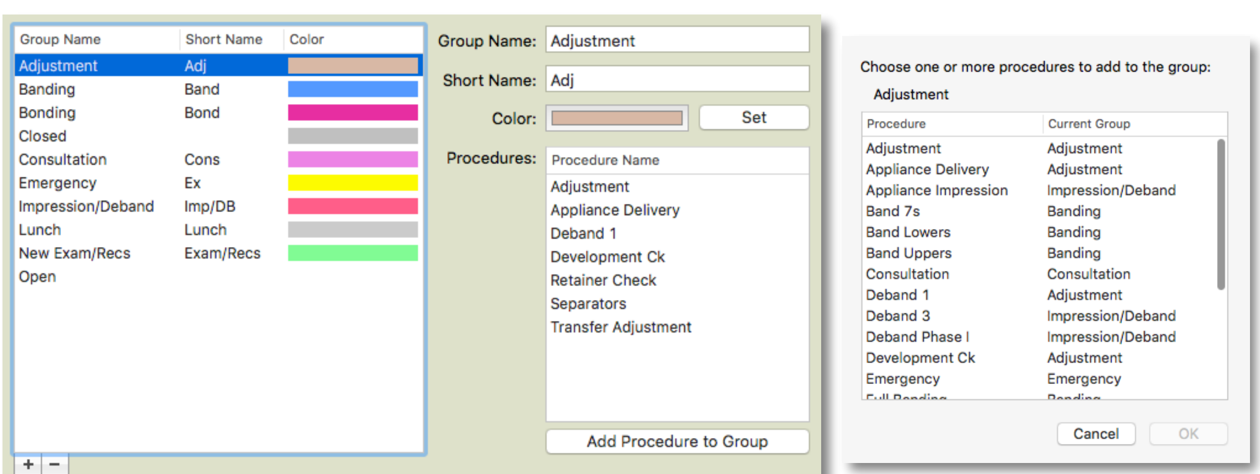
Group Name: The name of your group.

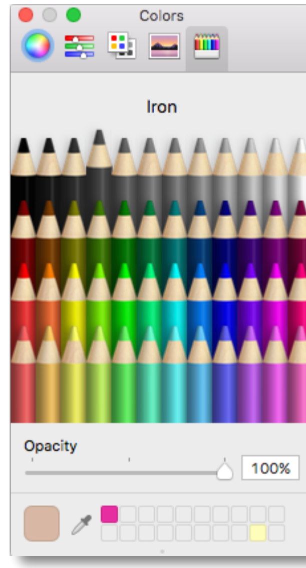
Short Name: The abbreviated group name.

Color: The background color of the group.

Procedures: The list of procedures that belong to the group.

Add Procedure to Group: Shows the entire list of procedures for you to select and add.





Modifying a Color for a Procedure Group
1. Click topsOrtho from the menu bar.
2. Click Practice Setup...
3. Enter your password.
4. Click Calendar.
5. Enter your password.
6. Click the Procedure Groups tab.
7. Click on the Group Name for which you would like to change the color.
8. Click the Color: box.
9. Click the Crayon box if necessary.
10. Click on the color you would like.
11. Click the Set button to set the new color.
12. Close the Colors window.

17D Customizing Appointment Intervals
Not in use at this time.

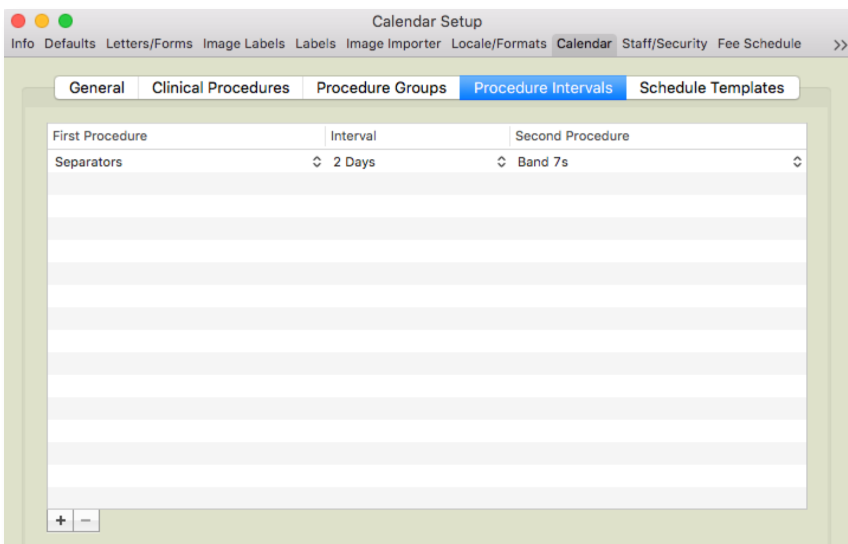


Figure 17-4: *Procedure Intervals*

17E Creating Schedule Templates

Templates help you select appropriate times for scheduling various appointments.

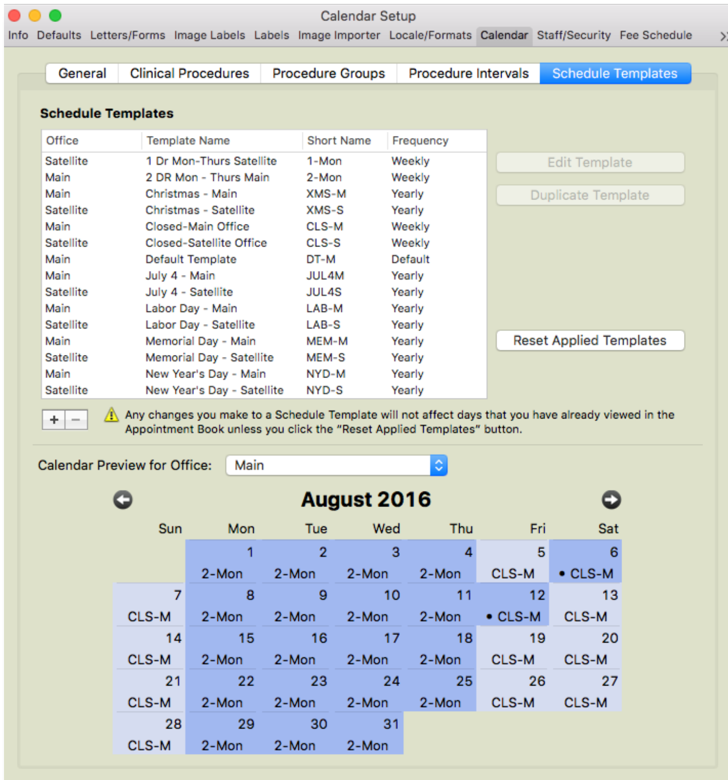


Figure 17-5: *Schedule Templates*

Some basics about the Schedule Templates Calendar in Practice Setup are located at the end of this section. topsOrtho provides two templates: Default Template and Closed-Main Office template. **Do not delete either of these**.

The Default Template is an open, 5-column template with 8 a.m. to 7 p.m. hours. Until you assign new templates, this is the one you will see in your Appointment Book.

The Closed–Main Office template is assigned automatically to Saturdays and Sundays. This prevents you from scrolling through those days as you search for available appointments.

When you're ready to create customized templates, just make a duplicate template from the Default Template and rename it to reflect your practice.

For example:

Thanksgiving	Closed the fourth Thursday and Friday in November
Closed Fridays	Closed every Friday
Tues &Thurs 8-12	Open on Tuesday and Thursday from 8 am to noon
Mon & Wed 8-5	Open on Monday and Wednesday from 8 am to 5 pm

Once your templates are created, place the procedure groups in the appropriate columns and times.

Once you have applied your templates, they are in place indefinitely. If you want to change any of the templates and have already scheduled appointments or even viewed the future days, the modified template will **not** be applied to those future days you have already viewed.

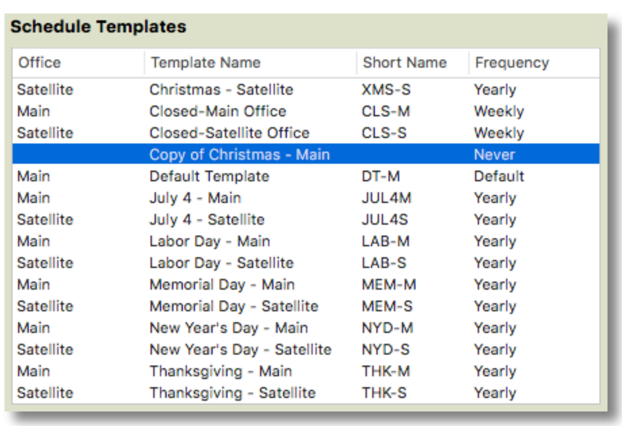
The warning reads:
Any changes you make to a Schedule Template will not affect days that you have already viewed in the Appointment Book unless you click the “Reset Applied Templates” button.

How to Reset Applied Templates

1. Click the Reset Applied Templates button and choose if you want templates applied to a specific day, date range, or on/after a specific date.
2. Select if you want to apply template backgrounds to open or close each day based on the template value. If a day already has appointments then it will remain open regardless of the template value. Or, you can choose to apply template backgrounds without opening or closing days.
3. The schedule will compress as far as it can with appointments still visible. Appointments will not be hidden. For example, if the initial template had 4 columns and the new template has 3 columns and there are patients scheduled in the 4th column, the 4th column will be white and patients will still be shown. Or, if you change the hours from 8am to 9am and you had procedure group blocks (the column procedure templates) from 8am to 10am those blocks will be there regardless of the open and close time. Basically, the schedule will compress as much as it can, but color blocks will still be visible.

Creating a Holiday Template

1. Click the Closed-Main Office template.
2. Click Duplicate Template.



Schedule Templates

Office	Template Name	Short Name	Frequency
Satellite	Christmas - Satellite	XMS-S	Yearly
Main	Closed-Main Office	CLS-M	Weekly
Satellite	Closed-Satellite Office	CLS-S	Weekly
	Copy of Christmas - Main		Never
Main	Default Template	DT-M	Default
Main	July 4 - Main	JUL4M	Yearly
Satellite	July 4 - Satellite	JUL4S	Yearly
Main	Labor Day - Main	LAB-M	Yearly
Satellite	Labor Day - Satellite	LAB-S	Yearly
Main	Memorial Day - Main	MEM-M	Yearly
Satellite	Memorial Day - Satellite	MEM-S	Yearly
Main	New Year's Day - Main	NYD-M	Yearly
Satellite	New Year's Day - Satellite	NYD-S	Yearly
Main	Thanksgiving - Main	THK-M	Yearly
Satellite	Thanksgiving - Satellite	THK-S	Yearly

Figure 17-6: *Schedule Templates*

3. Click the Edit Template button. The below window will appear.

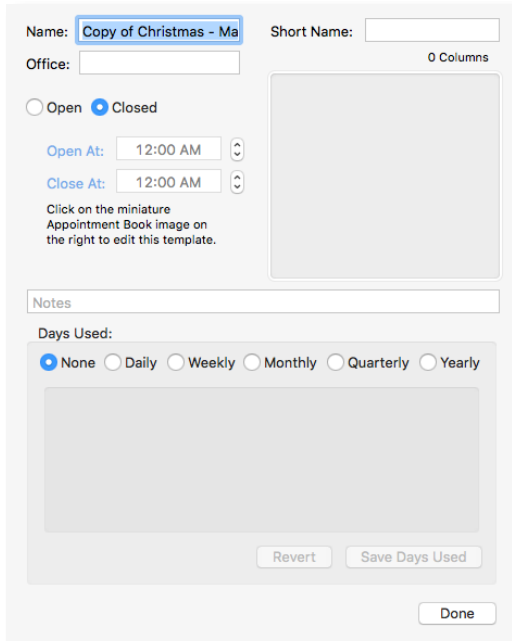


Figure 17-7: *Copy of Template*

4. Type a descriptive name for your template, e.g., Christmas. Press the Tab key.
5. Click on the office location. Press Tab.
6. Enter any notes about the template.
7. Verify the Closed radio button is selected.
8. Click the Yearly radio button.
9. Select the month December.
10. Click 25 for the day.
11. Click the Save Days Used button.
12. Click Done button. The template is saved.

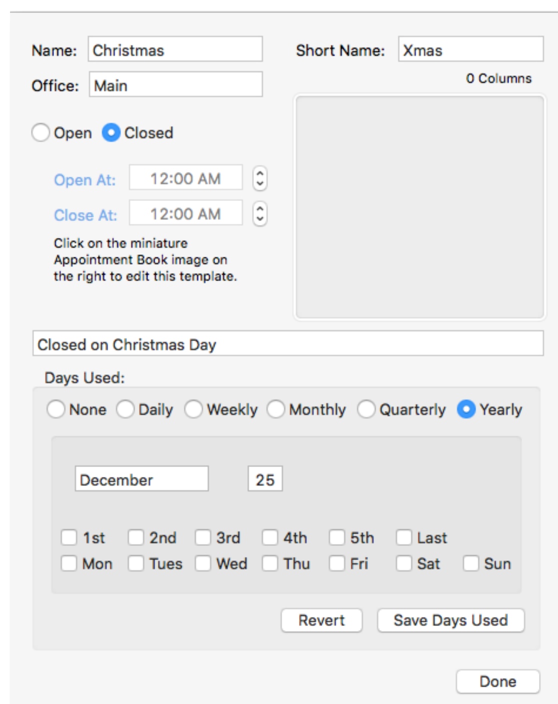
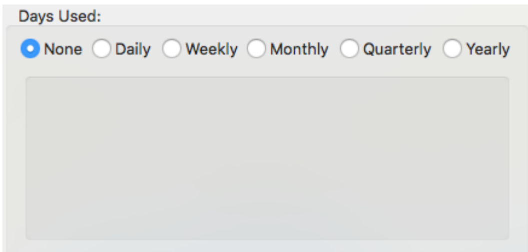
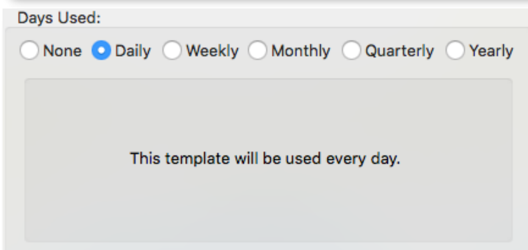


Figure 17-8: *Completed Holiday Template*

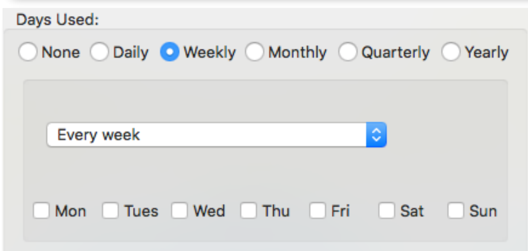
Days Used Definitions



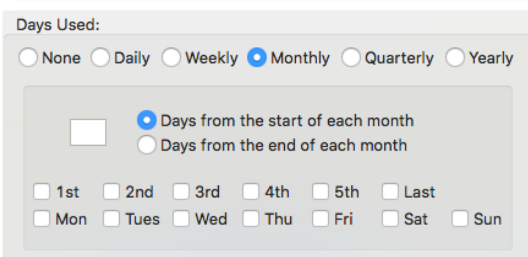
None -Templates that you want to manually assign on a day-by-day basis. This is recommended for practices whose template assignment does not follow a typical pattern.



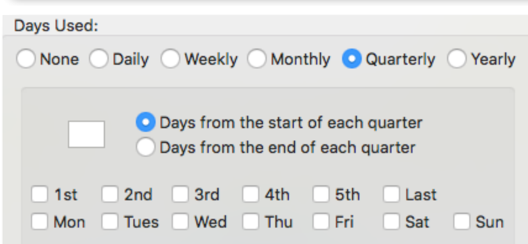
Daily -Templates you want to use every day; recommended for practices whose templates never deviate.



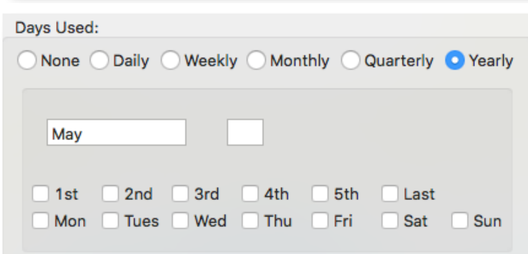
Weekly - Template will be used every week on the day of the week that you check. Multiple days can be selected. This is recommended for practices that have different schedules on different days of the week.



Monthly -Templates used on a particular day every month. Recommended for offices that schedule patients at a satellite location a few times a month or that accommodate multiple doctor schedules.



Quarterly - Templates assigned to particular dates each quarter. Recommended for offices that schedule patients at a satellite location a few times a quarter, or that have regularly scheduled short or meeting days per quarter.



Yearly - Template assigned to specific days of the year; recommended for holidays and office closings.

Creating a Schedule Template
1. Click the Default Template.
2. Click Duplicate Template.
3. Click the Edit Template button.
4. Enter a descriptive name, i.e., Mon & Wed. Press Tab.
5. Select the Office and Tab.
6. Enter in any notes about this template.
7. Change the hours.
8. Click Weekly for the days used.

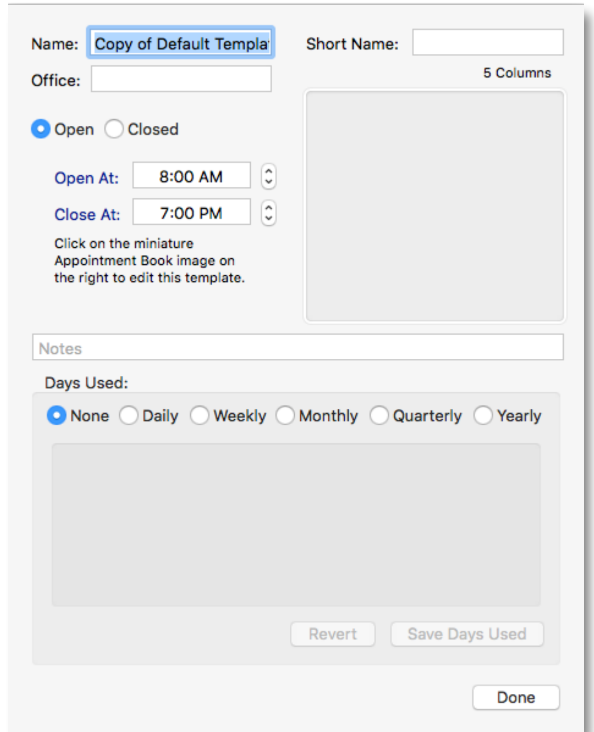


Figure 17-9: *Copy of Template*

9. Click Mon and Wed.
10. Click the Save Days Used button. The template should look like the following figure.

Don't click Done yet!

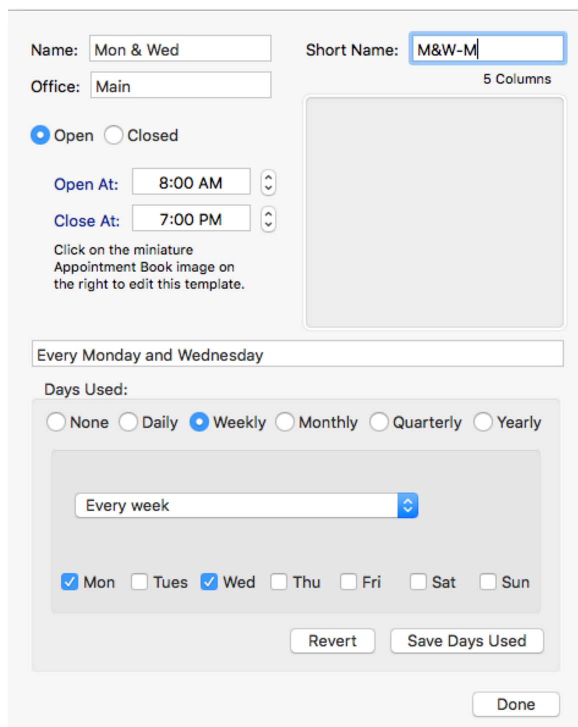
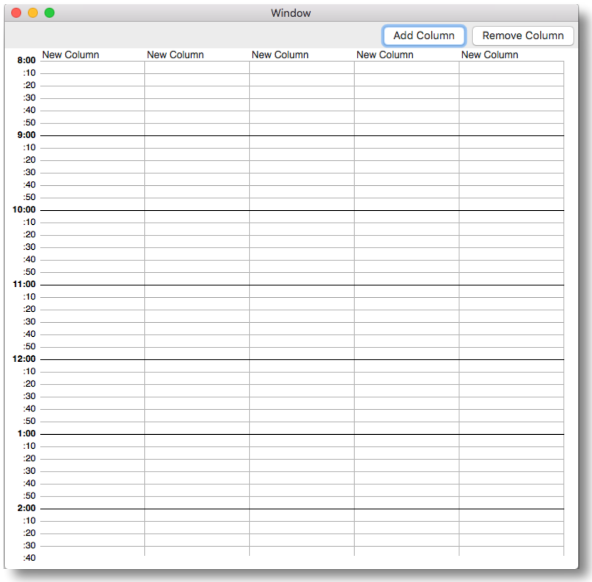


Figure 17-10: *Mon & Wed template*

Adding Procedure Groups to the Calendar



1. Click in the large empty square located at the right of the template. The window opens into five columns.

Add Column - Allows you to add more columns to the schedule.

Remove Column - Allows you to delete columns from the schedule.

New Column - Can be renamed according to your clinic protocol, e.g., Chair 1, Chair 2 or Susan, Jim, etc. Double-click on the words New Column to select and then type in the new name.

11. Add or Remove columns as necessary.
12. Rename the columns to suit your clinic.
13. Drag over the timeframe that you would like to add the procedure group to. Once you release the mouse the Choose a procedure group appears.

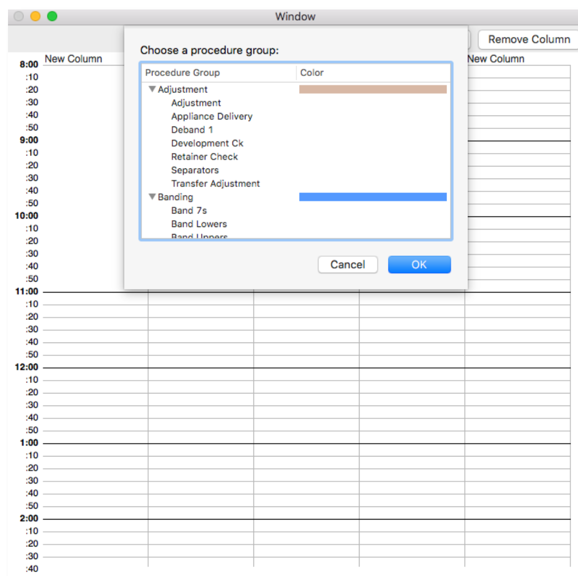


Figure 17-11: *Choose a procedure group*

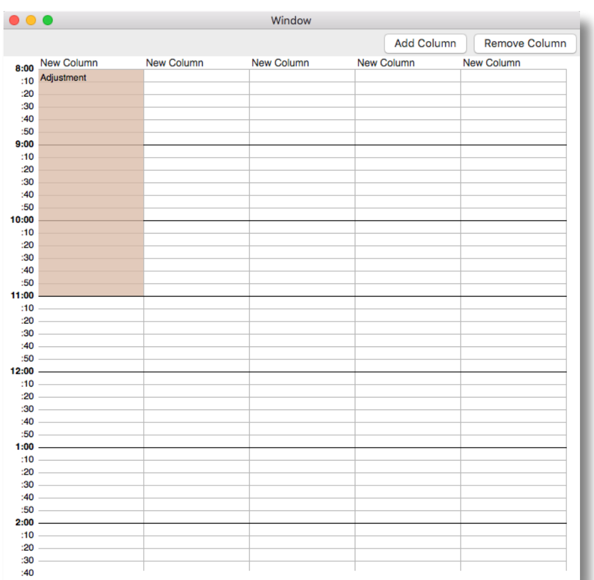


Figure 17-12: *Added procedure group*

14. Click the Procedure Group you would like to enter. The group has been added.
15. Continue to add groups as required.
16. Close the column window.
17. Click Done button to save your template.

Modifying a Specific Appointment Book Day

You can modify a single day in the Appointment Book without changing the schedule template. You may need to accommodate a longer lunch, a meeting, or the practice closing for a day. Depending on what action is to be done, the task can be completed on the Appointment Book or the Calendar Template in Practice Setup.

1. Navigate to the day you would like to change on your appointment book.

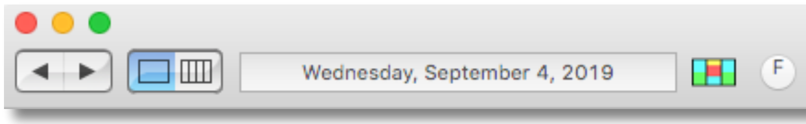


Figure 17-13: *Appointment Book*

2. Click the multi-colored square. You will be placed in the appointment book template for the day selected.

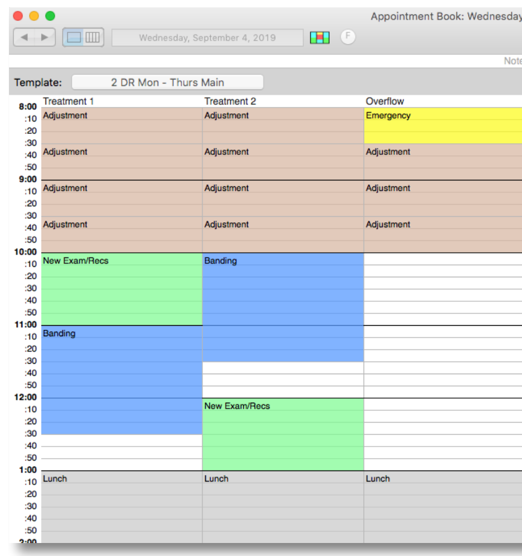
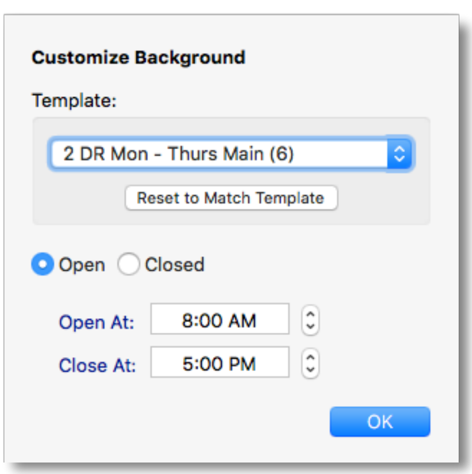


Figure 17-14: *Daily Template*

3. Click the bar containing the scheduled template. The customized background will open.



Template - Click the arrow to assign a new template for the day.

Reset to Match Template - Change the template back to match the calendar in the Calendar Setup

Open/Closed - Click the appropriate radio button for the day.

Open At:/Close At - Adjust the times as appropriate for the day.

How to use the Schedule Templates Calendar

Here are some basics about the Schedule Templates Calendar in Practice Setup:

1. The calendar is color coded so you can quickly see if a day is open or closed.
   - Dark blue means the day is open.
   - Light blue means the day is closed.
2. Create a short name for each of your schedule templates and it will be visible on the calendar. To add short names, from the Schedule Templates section, click in the template row, select edit template, and add your preferred short name. The maximum number of characters allowed is five.
3. To see the calendar preview for your satellite locations, select the location from the Calendar Preview for Office popup menu.
4. Click the arrows to move forward and back from month by month.
5. When you mouse over a day you will see the gearwheel, click on the gear wheel to view the templates contextual menu. From the contextual menu you can view the current template, change the day to open or closed, and select another template to apply to the day. If the information is grayed out in the menu, it means the day is today's date or it's a day in the past. You are only allowed to changes from tomorrow's date forward.

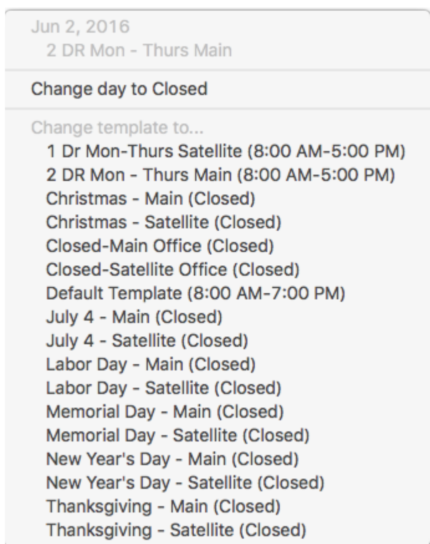


Figure 17-15: *Template Calendar Options*

6. A black dot indicator on the calendar, means that the day's open or closed value is opposite from the template's open or closed value that is assigned to that day.

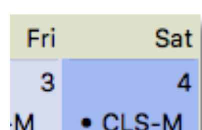


Figure 17-16: *Template Calendar*

In this lesson, you should feel confident with:

- Setting calendar defaults
- Customizing practice procedures
- Customizing procedure groups
- Creating schedule templates

Lesson 18 Customizing Administrative Templates

Lesson Eighteen Overview

This lesson focuses on creating and customizing letters and forms. You will learn the necessary tools to have outstanding letters from your practice!

Objectives:

To become familiar with the administrative template, you will:

18A Add a Background
Add a customized background to your letters. You can also scan your letterhead as a .PDF file for importing into topsOrtho.

18B Modify Forms
"Forms" in topsOrtho are statements, receipts, insurance claims, contracts, payment coupons and Appointment Slips. Each of these items can be customized.

18C Create and Modify Letters
topsOrtho contains several letter templates that will be loaded for you. Each of these templates can be customized once you make a copy of them.

18D Advanced Letters
Taking you beyond the basics to creating flows, styles and covering your letterhead on the second page of a document.

18A Backgrounds

Backgrounds are backdrops to certain templates that are included with topsOrtho. Each of these “built-in” backgrounds are designated with a lock indicating they cannot be edited, but a copy can be created and edited.

Viewing Backgrounds

1. Click topsOrtho from the menu bar.
2. Click Practice Setup...
3. Enter your password.
4. Click Letters/Forms.
5. Click Backgrounds.
6. Click on a “locked” template to view.

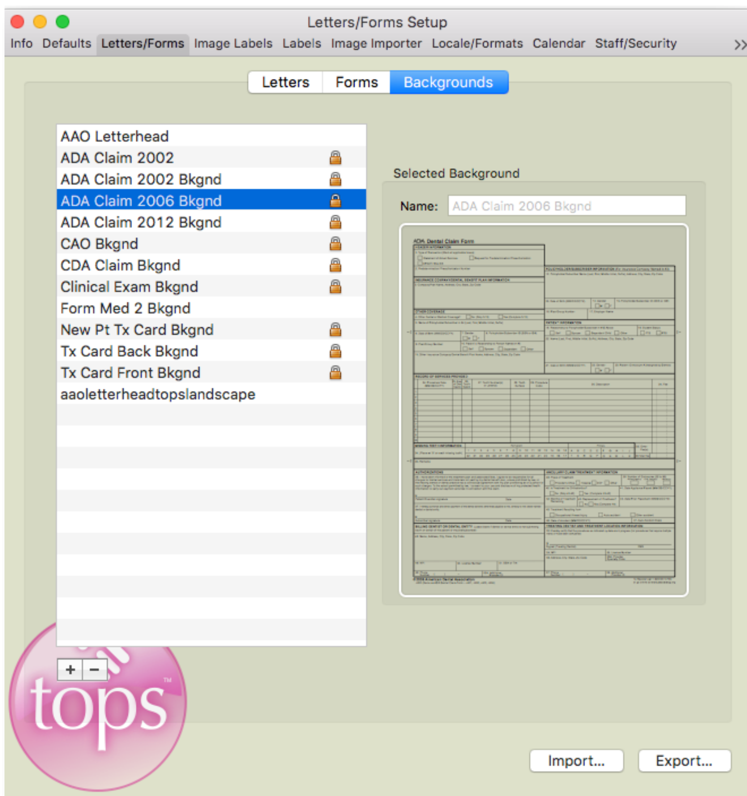


Figure 18-1: *Letters/Forms Setup*

Adding a Letterhead Background

1. Create a PDF of your letterhead and name “Letterhead”.
2. Save the PDF to your desktop.
3. Click Import…
4. Locate the PDF that you just saved on the desktop.
5. Click on the PDF.
6. Click Open to import your letterhead into topsOrtho.
7. You will use this background when we create a letter.

Do not delete backgrounds that are in use. Your letters will not be correct. If needed, layout your letterhead on a full page so it is properly aligned on the letter template.

18B Forms

Form templates are used for automatic processes in topsOrtho, such as statements and insurance claims. The forms that topsOrtho provides are locked to prevent accidental deletion. You can also modify any of the built in forms, plus select the default form that you would like topsOrtho to use each time the item is printed.

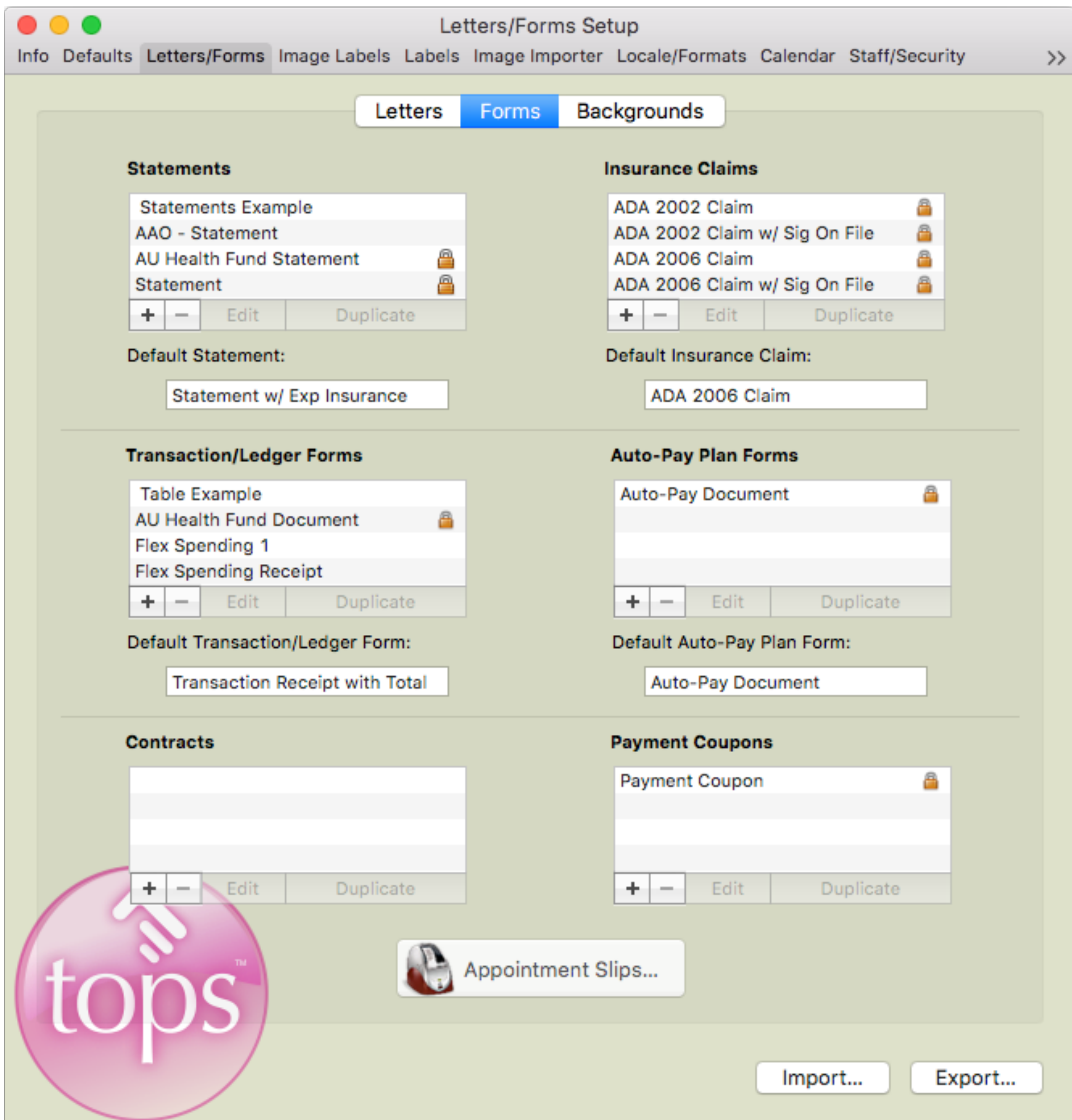


Figure 18-2: *Forms*

Selecting a Default Form
1. Click in a Default form field.
2. Click the form that you would like to use as the default.

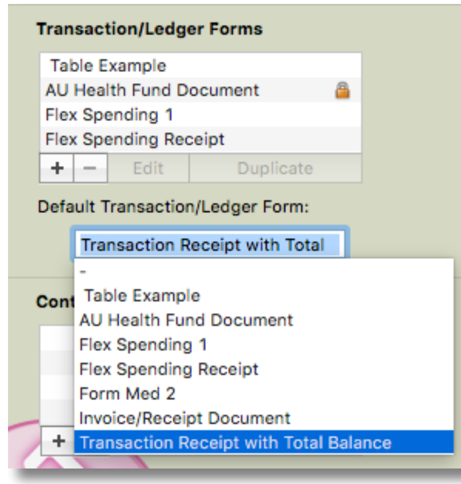
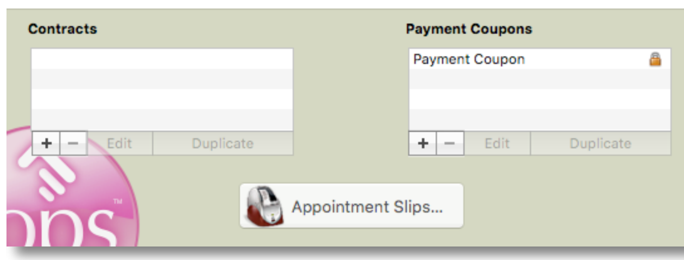


Figure 18-3: *Default Form*

Appointment Slips
1. Click Appointment Slips button.
2. Modify as necessary.



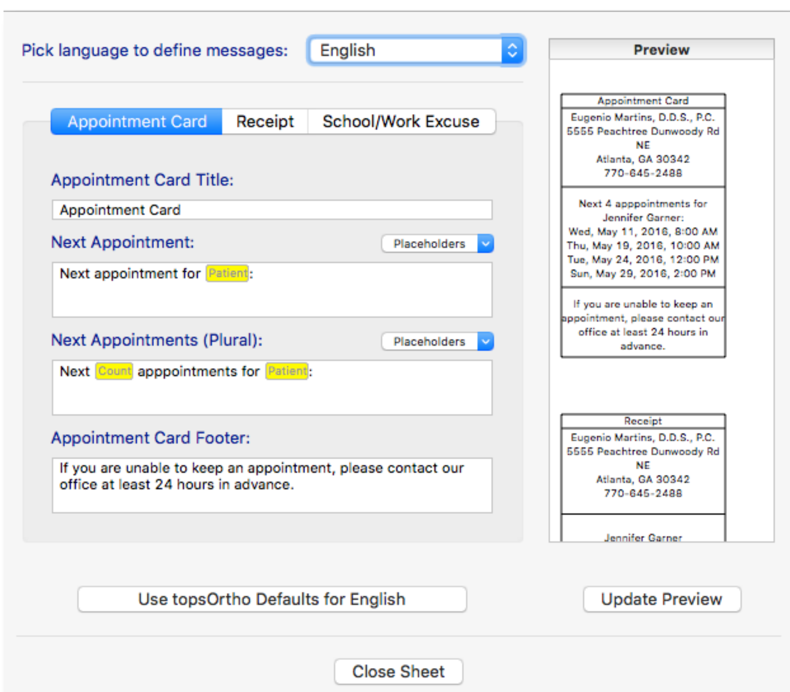


Figure 18-4: *Appointment Slips*

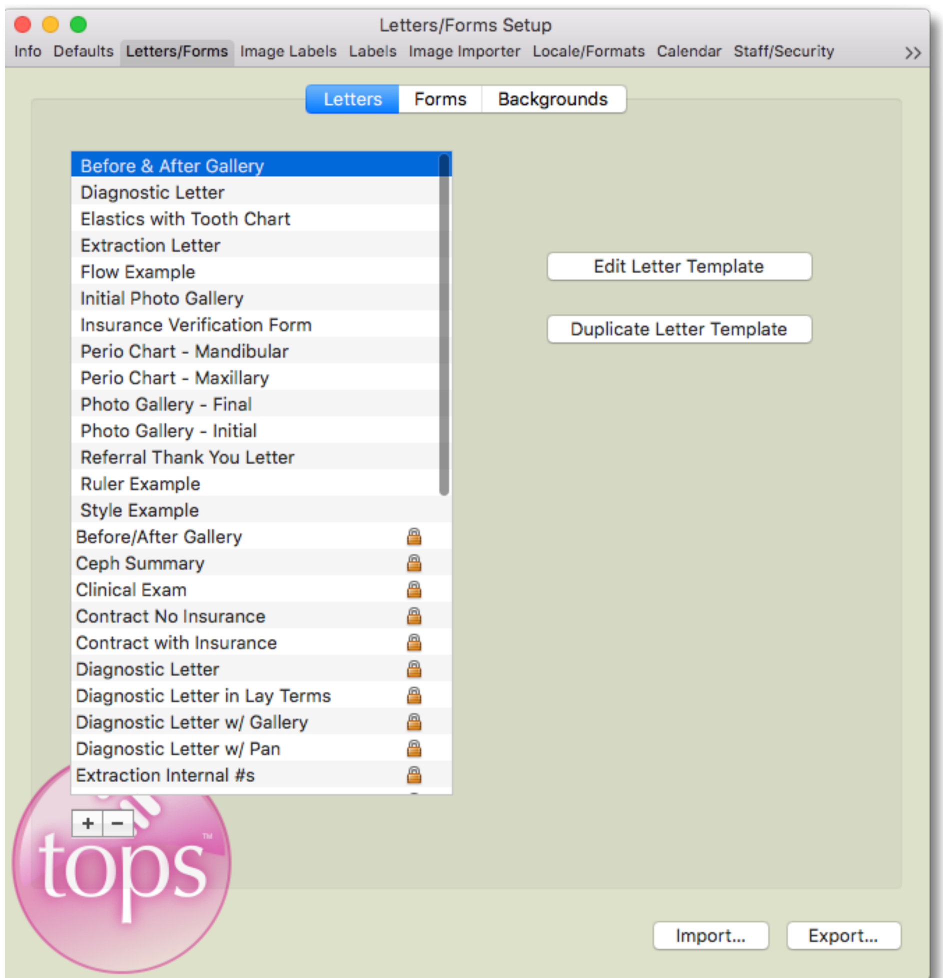
18C Letters

Letter templates allow you to communicate with patients, account holders, referring dentists or specialists regarding patients' specific treatment needs. You have created several letters throughout this training session. You are now going to learn how the letter templates are created. You can use the same methods to create or modify forms.

Creating a Duplicate Template

1. Click topsOrtho from the menu bar.
2. Click Practice Set Up...
3. Enter your password.
4. Click Letters/Forms.
5. Click Letters, if required.

Figure 18-5: *Letters*



6. Click on a locked template that you would like to duplicate.
7. Click Duplicate Letter Template.

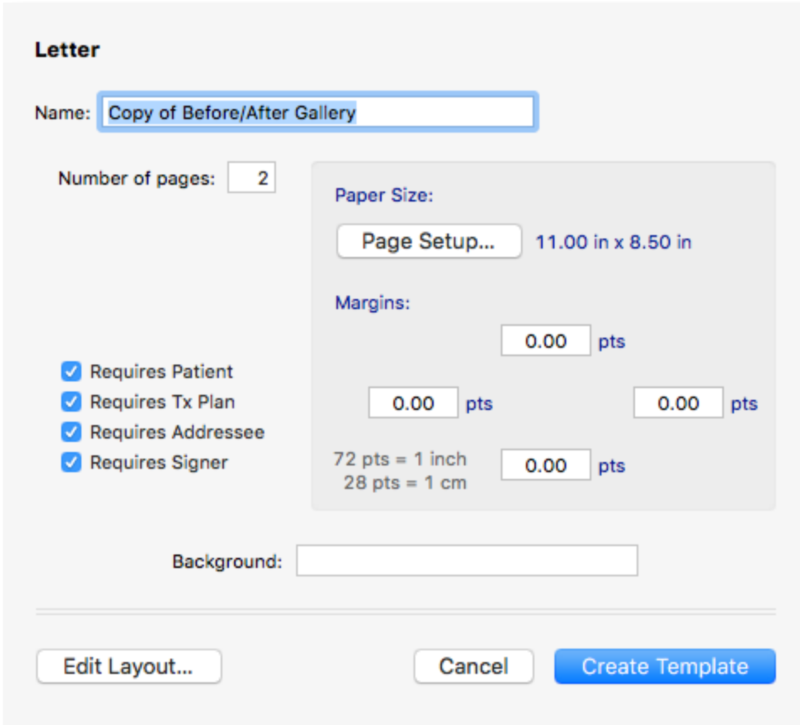
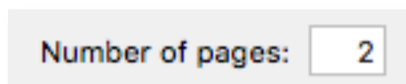


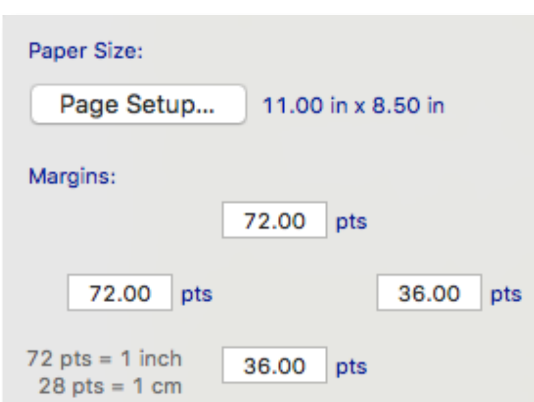
Figure 18-6: *Creating a Duplicate Letter Template*

8. Enter a descriptive name for your template. Let's go over the Letter template choices.

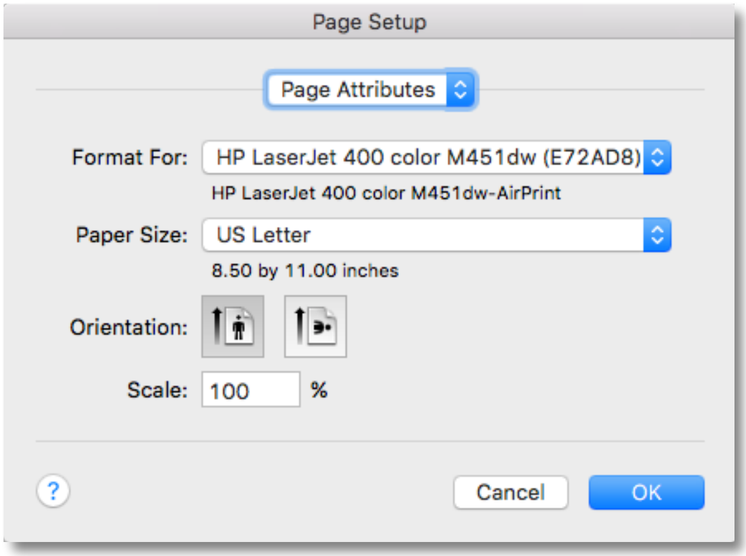


You can designate the number of pages your letter can contain. You can also change this in the format menu.

Each check mark indicates that there are placeholders in the letter that require this information. Each item checked causes you to select from a list when you actually create a letter for an individual. If your letter does not require one of the checked item, simply remove the check by clicking on it.

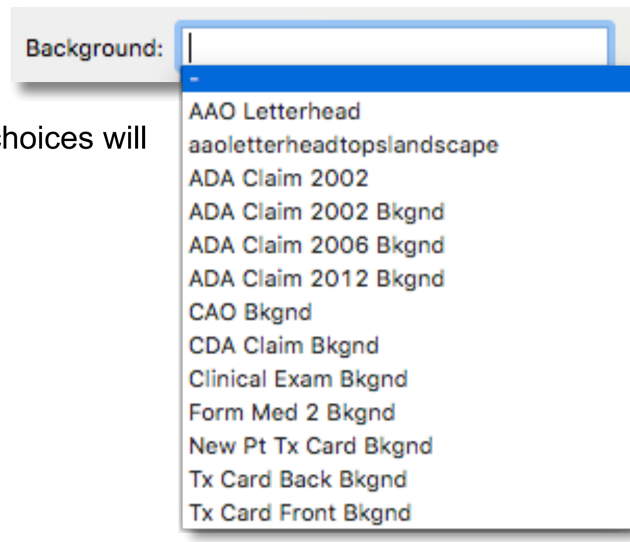


What size of paper do you require for the template? If you click Page Setup... you will be offered more choices.
Designate your margins by entering the correct number of points. As displayed, 72 pts equals 1 inch.



Page Setup additional options.

In the previous topic, you created a letterhead background. It is now displayed in the drop-down field. Just click in the field and all the background choices will be offered.



9. Click Edit Layout to see the template.
10. If you receive the following prompt, click Convert.

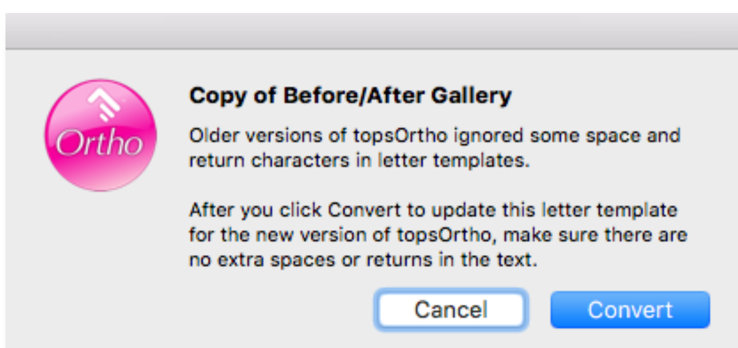


Figure 18-7: *Conversion warning*

The newly created template will look similar to this:

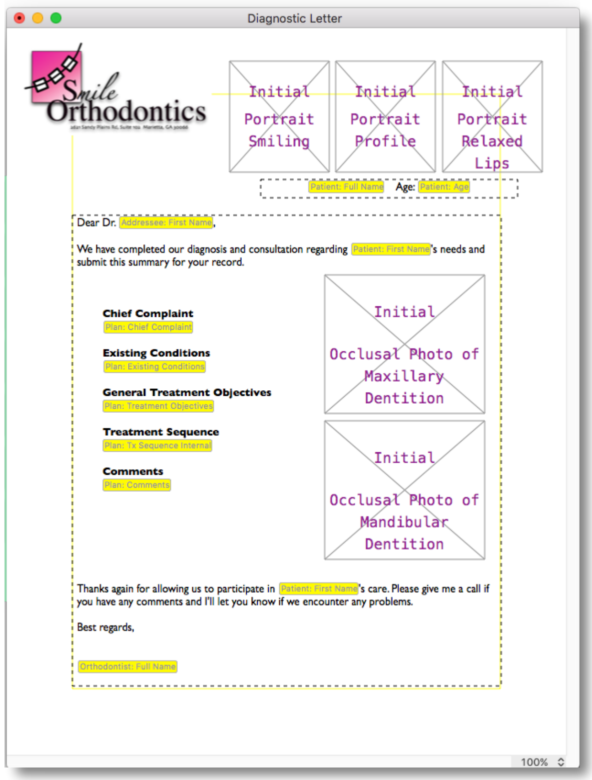


Figure 18-8: *Letter template*

Template Basics

The yellow box around the paper represents the margins that were selected.

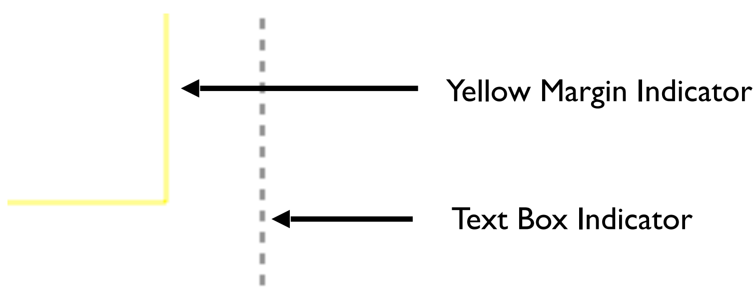


Figure 18-9: *Margin and Text Box Indicators*

Text boxes are placed on the letter template to indicate where you would like text to appear. You can have as many text boxes as you need. For example, you may want a letter to have the first text box at the top with margins that are the size you designated.

The second text box indicates a narrow margin, perhaps to allow a picture to be placed on the right side. The third text box again incorporates a full designated margin.

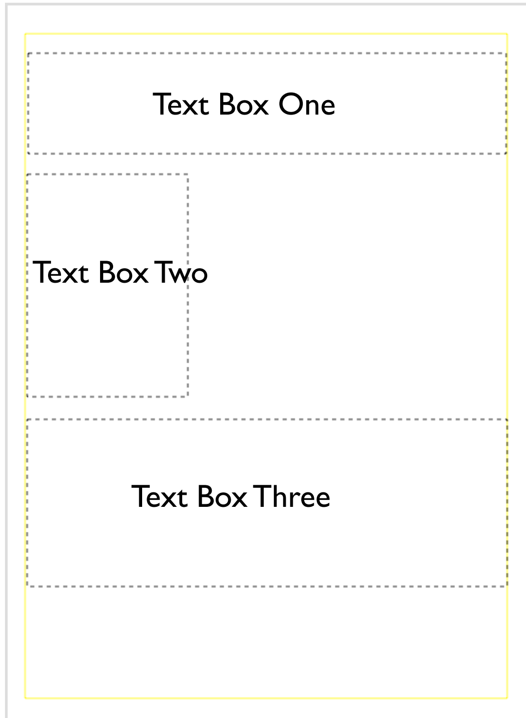


Figure 18-10: *Different Size Text Boxes*

Just because you designated the margins to be different does not mean that a drawn text box has to have the same margins. A text box is as flexible as you require. You can change the text box by selecting it and dragging to the size that you need. You will learn this in a few minutes.

Placeholders

The yellow boxed fields are known as placeholders. Placeholders are merge fields that allow one template to be used for multiple patients, and that pull specific information for the patient you have chosen. The below example indicates to go to the Patient Information window and find the Patient's Full Name. The second field instructs the template to go the addressee specified and enter his full name.

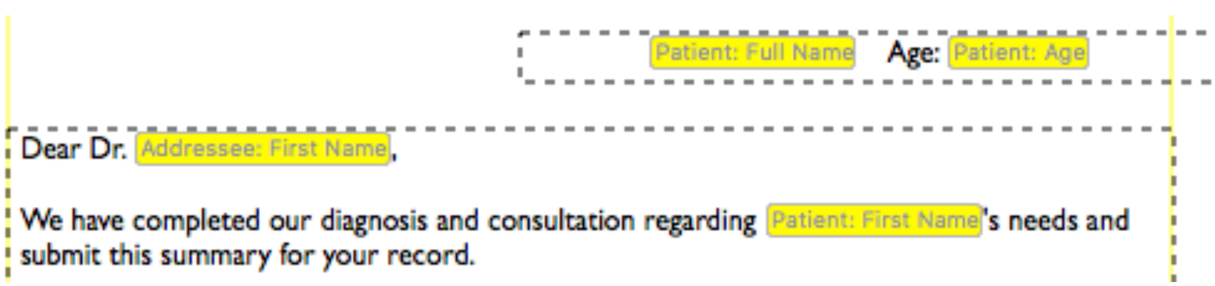


Figure 18-11: *Placeholders*

Placeholders are located in the Format menu bar item under Show Placeholders.

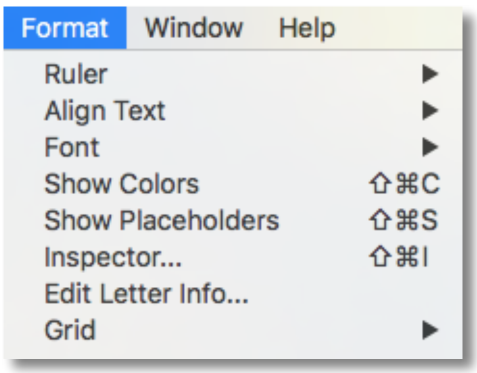


Figure 18-12: *Placeholder Selections*

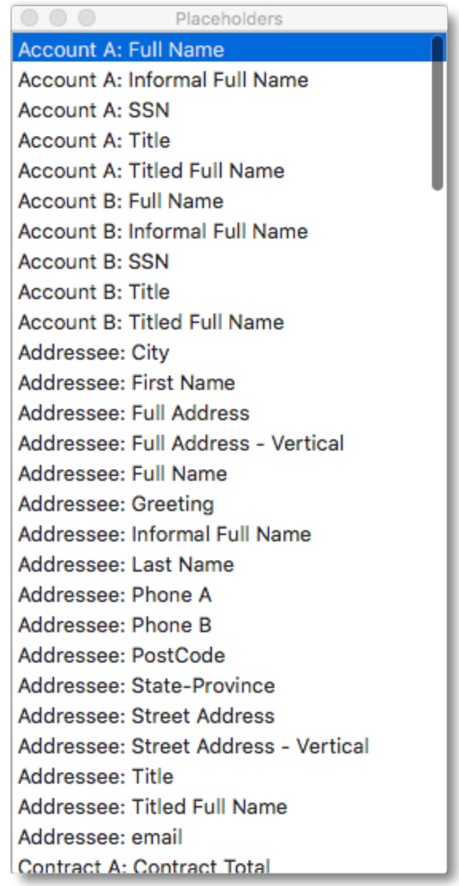


Image Box

Image boxes allow you to add any image to your letter templates that you have imported into topsOrtho. All you need to tell topsOrtho is the Image set and which image in the set that you would like to display.

Figure 18-13: *Image Box*

If you drag the image box to look more like a rectangle, topsOrtho will make the photo appear proportionately in the template. The image will not be distorted or stretch to fit to the size of the box.

The Toolbox
The toolbox is displayed on the left side of the letter template. It contains several tools that will allow you to modify the letter template however you need.

Arrow - Use this tool to select an object on your template.

Square/Rectangle - Use this tool to draw a square or rectangle on a template.

Circle/Oval - This tool is used to draw a circle or oval on a template.

Line - Click on this tool to add a line or lines to a template.

Text Box - Use this tool to add a text box to a template.

Image Box - Add an image to a template with this tool.

Table–Allows you to add a custom table to your template. This tool is typically used by the topsOrtho programming team.

Information–This tool displays information about your template.

Format Menu

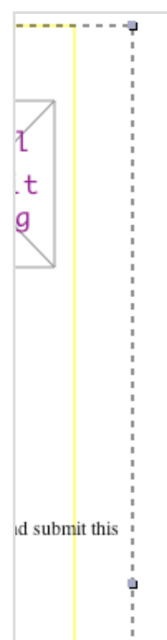
Many of the formatting functions are located in the format menu. Each allows you to customize your letter or template. Most of these items are self-explanatory, but the most frequently used items are featured in this lesson.

Items to use with Letters/Forms
Format
- **Ruler**
- **Align Text**
- **Font**
- **Show Colors**
- **Show Placeholders**
- **Inspector…**
- **Edit Letter Info…**
- **Grid**
- **Selection Tool**
- **Align and Size Objects**
- **Bring to Front**
- **Send to Back**
- **Bring Forward**
- **Send Back**
- **Group**
- **Ungroup**
- **Lock**
- **Unlock**
- **Add a Page**
- **Delete Last Page**
- **Make Flow**
- **Break Flow**

Figure 18-14: *Format Menu*

Resizing a Text Box

You may not like the size of a text box and need to resize it.



1. Click inside the text box to select. A series of little squares or “handles” will appear in the corners and in the middle of the corners.

   Corner handles resize both the horizontal **AND** vertical lines.

   Middle handles resize on the horizontal **OR** vertical lines, depending upon which one the mouse pointer is setting on.

2. Place the mouse pointer on the middle vertical handle.
3. Drag the handle to the left to resize the text box to the yellow margin indicators. Only the right side of the text box has been resized. Notice that the text will wrap according to the margins.
4. Click outside the text box into the margin and the handles will disappear. The text box is no longer selected.

Changing a Placeholder

Let's change the date placeholder. Currently, this template specifies a **Letter: Short Date**. This displays the date as 08/10/12. You may prefer to have the date spelled out with the month, in which case, the placeholder looks like this: **Letter: Long Date**. This displays the date as August 10, 2012.

1. Double-click inside the text box that contains the placeholder that you want to change. The blinking mouse cursor is placed at the top of the text box.
2. Place the mouse pointer on the placeholder and click one time to select. The placeholder will appear with gray shading around it.

Unselected Placeholder **Selected Placeholder**

3. Click Format from the menu bar.
4. Click Show Placeholders.
5. Double-click on Letter: Long Date. The original placeholder is deleted and replaced with the newly selected one.

Figure 18-15: *Replaced Placeholder*

Adding a Placeholder

1. Double-click to set the blinking cursor in a text box.
2. Place the blinking cursor where you would like the placeholder inserted.
3. Double-click on the placeholder to insert.

Adding an Image Box

1. Click on the Image Box tool  in the toolbox. The mouse pointer turns into a box.
2. Click and drag in the letter where you want to place the image box.

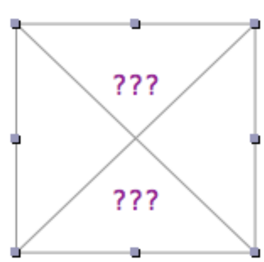


Figure 18-16: *Image Box*

3. Click the Arrow Tool  in the toolbox.
4. Click on the Image box to select.
5. Right click on the top questions marks. (Control + Click)

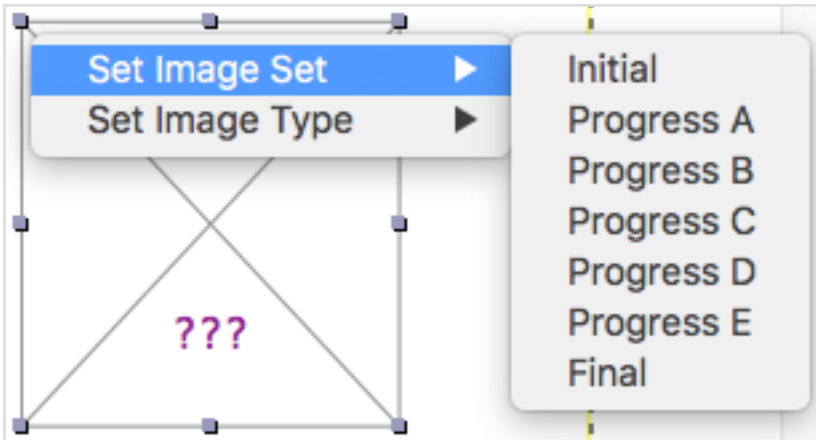


Figure 18-17: *Image Set Selection*

6. Select the appropriate Image Set for your image.
7. Right click on the bottom questions marks (Control + Click).

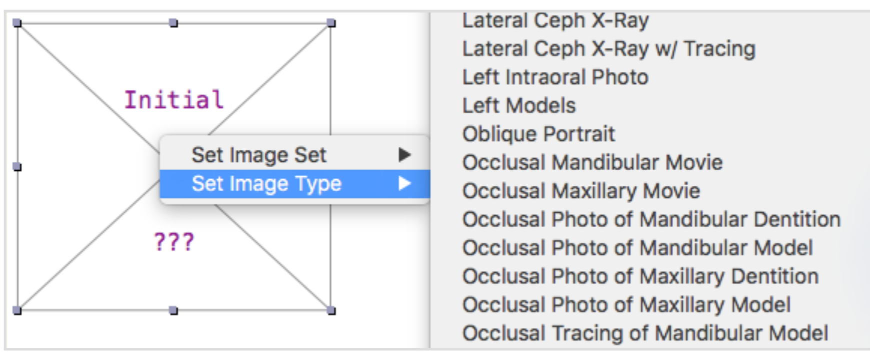


Figure 18-18: *Image Type Selection*

8. The image box now contains all the information required to set the image in the letter.

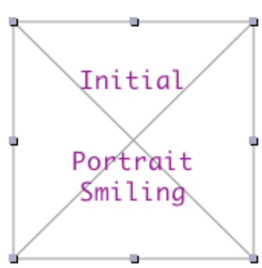


Figure 18-19: *Completed Image Box*

Adding a Drawing Image
You may need to add a drawing image (circle, square, line) to a letter or template. For example, a circle can emphasize a tooth that needs extracting. We will add a circle and show you how to change the attributes of the circle.

1. Click the Circle/Oval tool on the toolbox.
2. Click and drag to draw a circle on the template. The circle will appear with selection handles around it.

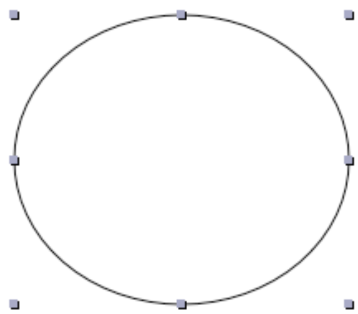


Figure 18-20: *Selected Circle*

3. Click on the Arrow Tool in the toolbox.
4. Click in the circle to select.
5. Place the mouse pointer in the middle of the circle and drag to relocate on the letter template.

Adding a Fill and Opacity
1. Click Format from the menu bar.
2. Inspector...

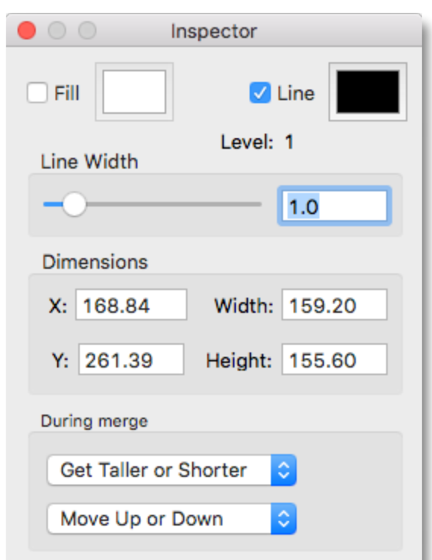


Figure 18-21: *Inspector*

3. Click in the check box to the left of fill.
4. Click in the white fill box. The Colors window displays.

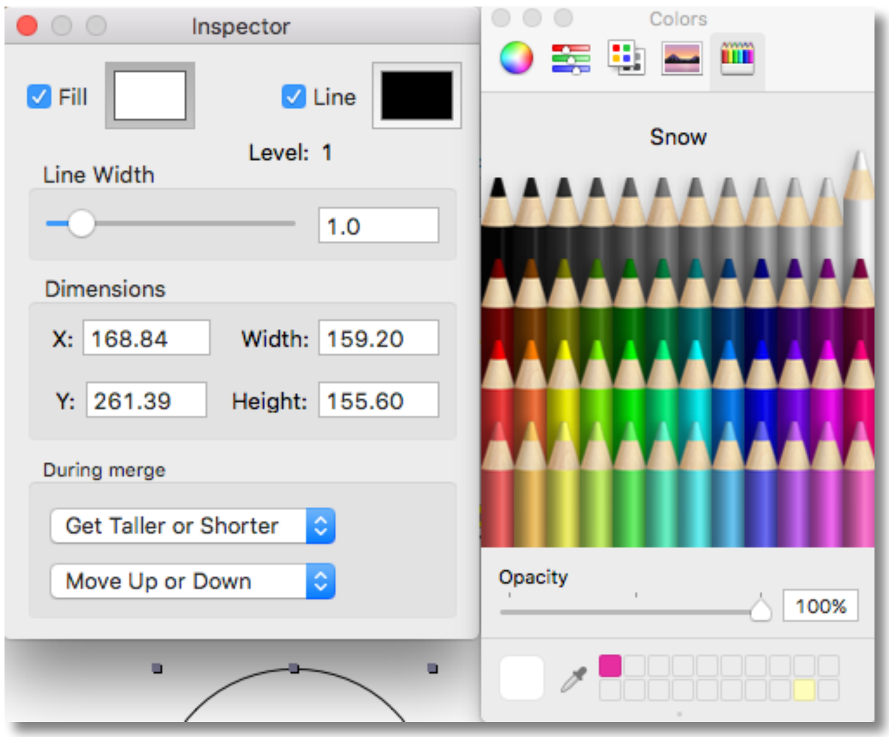


Figure 18-22: *Color window*

5. Click the color of your choice.
6. Drag the Opacity bar in the color box to the desired percentage of opacity.

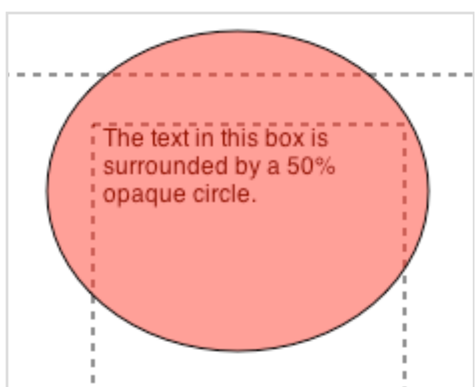


Figure 18-23: *50% Opacity Circle*

Using the Format Menu

As you can see, the Format Menu Bar item contains many more functions than the toolbar alone. The most frequently used items are discussed below.

Displaying the Ruler
The ruler allows you to change the tab and margin settings of text boxes. In order for the ruler to display, you must double click inside of a text box to see the blinking cursor.

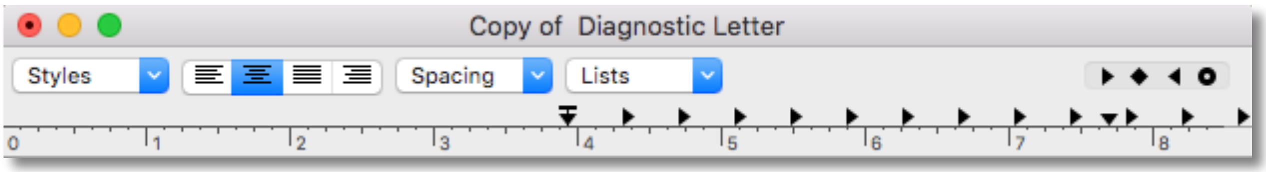
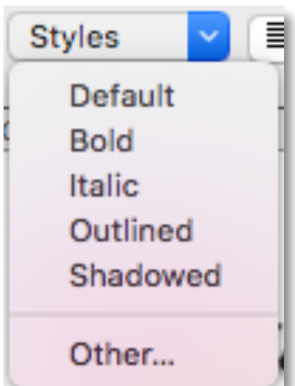
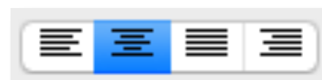


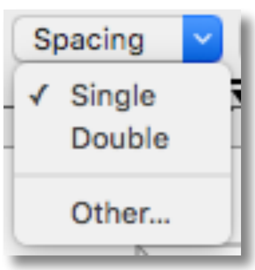
Figure 18-24: *Ruler*



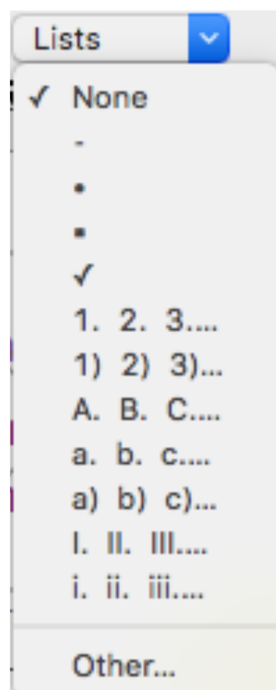
Styles–Click the font style that you want for a selected word or entire text box. You can also use Format Font for more functions.



Align Text–Left, Center, Justify and Right. You can also use Format–Align Text.



Spacing–Click the spacing that you want for your text box.



Lists–Select the type of list that you want for your letter or template.

Margin - Left and right margin settings.

Tab Settings–Left, Center, Right and Decimal. From the icons on the right, click one and drag it to where you'd like the new tab stop.
To remove an item, just drag it off the ruler.

Font Choices
The Fonts Window allows you to choose the typeface for your letters.

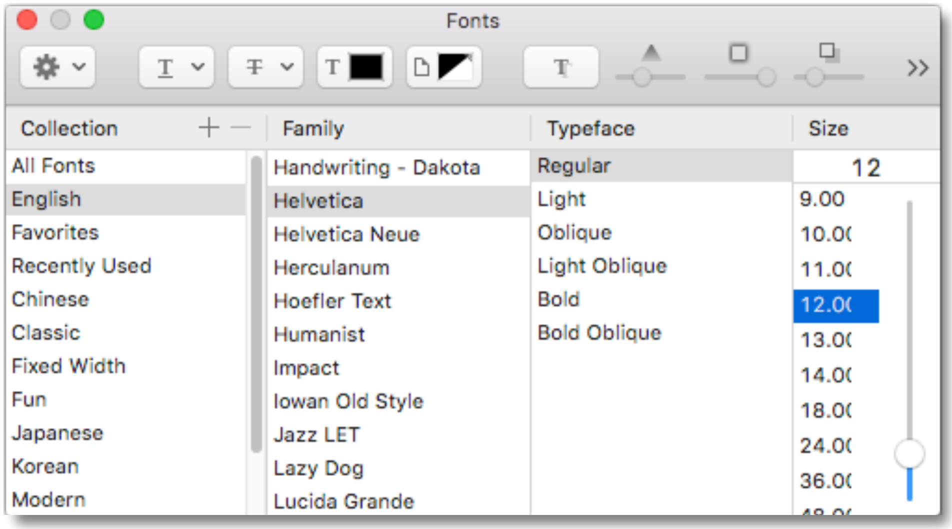


Figure 18-25: *Font*

Arranging Objects
If you have several objects on your letter you may need to align them in a specific order. The Align and Size Objects items will let you align in whatever way you require.

1. Click on the first object to align.
2. Hold down the **Shift key** and click on the second object. Both objects should have handles surrounding them.

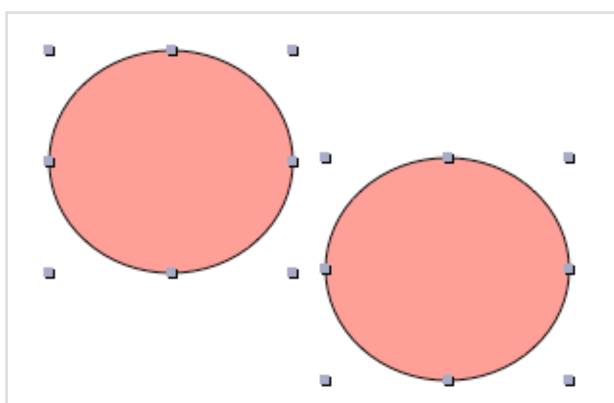


Figure 18-26: *Multiple Objects Selected*

3. Click Format from the menu bar.
4. Click Align and Size Objects.
5. Click Top Edges. The circles will align according to their top edges.

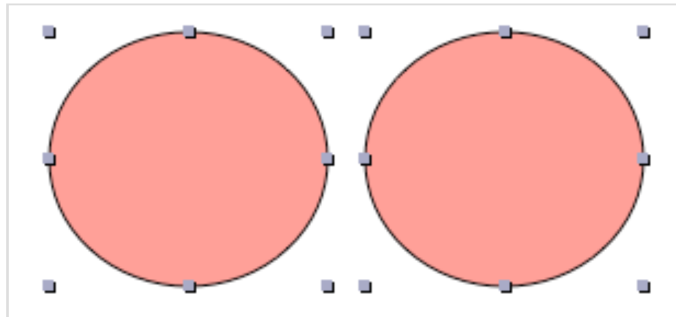
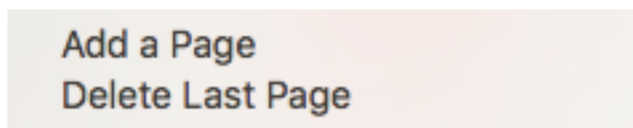


Figure 18-28: *Aligned circles*

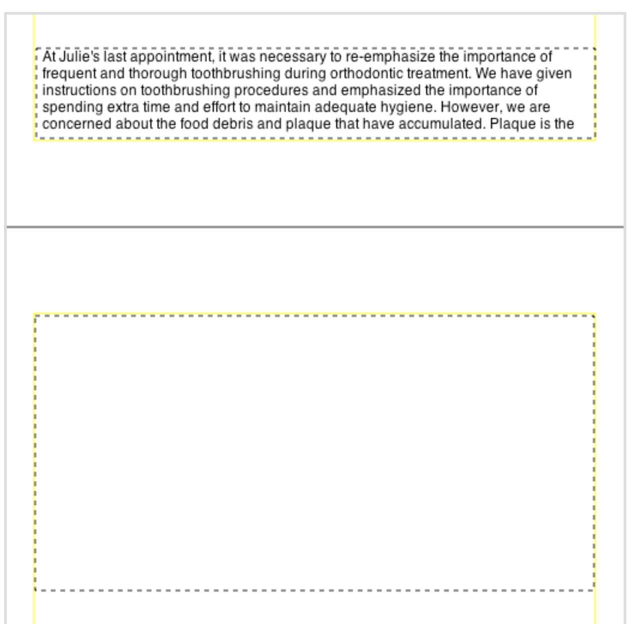
Figure 18-27: *Align and Size Object Choices*

Multi-Page Documents

When you need to add or delete a page of your letter or template, use the Format menu to Add a Page or Delete Last Page.



If you've created a text box and need the text to flow from one page to another, you must instruct topsOrtho to flow the text. For example, if you're typing in a text box located at the bottom of the page, you need to tell topsOrtho to allow the text to flow from page 1 onto page 2.



Page One

Page Two

Figure 18-29: *Two Page Letter Flow*

1. Click to select the first text box (on page 1). We want the text to flow from the top down.
2. Hold down the Shift key and click the second text box. Both boxes should have handles surrounding them.
3. Click Format from the menu bar.
4. Click Make Flow.

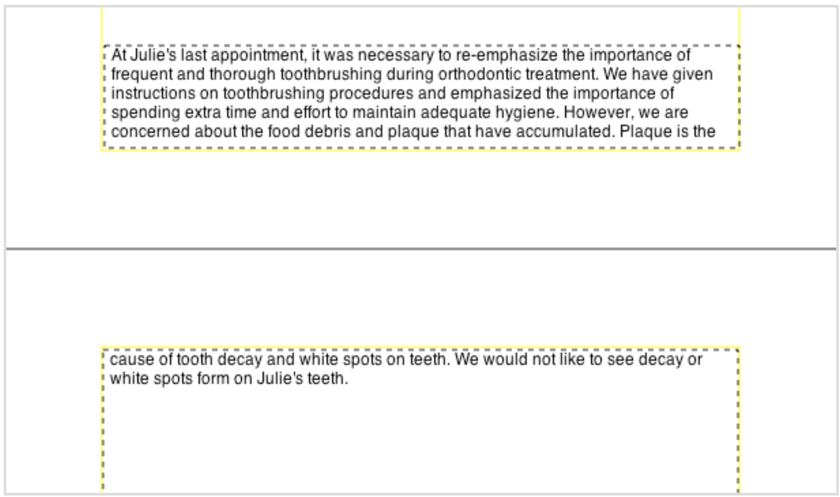


Figure 18-30: *Two Page Letter with Applied Flow*

18D Advanced Letters
topsOrtho contains many features for helping your correspondence look professional. Many of these were covered in the basic class with your trainer. The features that follow are advanced, yet easy to master. All are located in the Format menu, which is accessible when a letter or template is open.

Letter Flows
topsOrtho is flexible when it comes to text flow on letters. The size and placement of text boxes determine how letters will look when generated. If the amount of text can not fit in one box, the remaining text can flow into another box. These boxes can be in different locations on the letter. If the text box can not be moved or resized, a flow will be necessary.

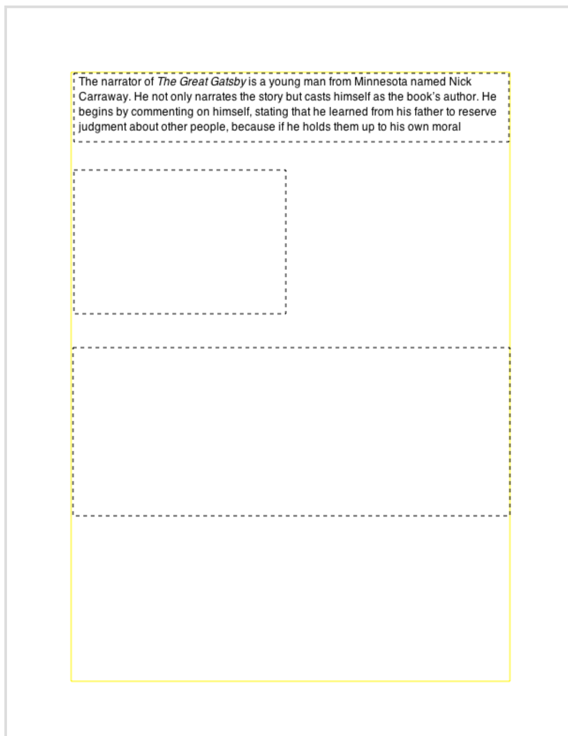
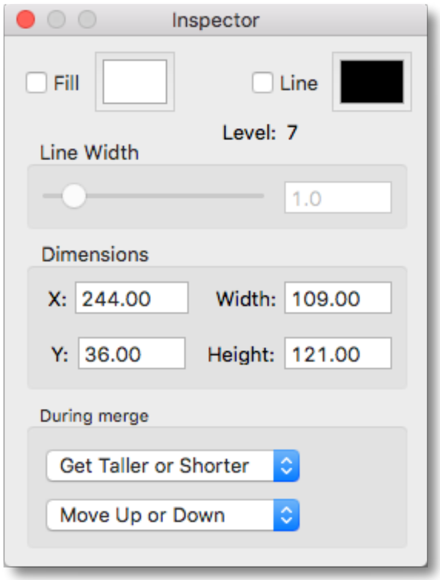


Figure 18-31: *Text Boxes Example*

The above example has text that is truncated because of the size of the text box.

The Inspector
The Inspector gives control over text boxes. Attributes such as not moving on the page and not resizing are choices in the inspector.

Displaying the Inspector
1. Click Format from the menu bar.
2. Click Inspector...



Fill–Used to indicate the fill color for an object.

Line–Used to indicate the line color for an object.

Dimensions–Used to control the size and placement of an object.

During Merge–Control the size and movement of an object.

To control the size and location of the text boxes we will use the two items in the During Merge section for this example.

Controlling the Merge
1. Click the Text tool.
2. Click the first text box.
3. In the Inspector, click the drop-down arrow to the right of Get Taller or Shorter.
4. Click No Resize.
5. Click the drop-down arrow to the right of Move Up or Down.
6. Click No Move.

With the above selections, the first text box will not expand, nor move up or down on the page during letter generation. The box will remain in the original size and location. These steps can be performed on any object that is placed on a letter template.

Creating Flows
1. Click the first text box that will start the flow.
2. Hold down the Shift key and click on the second box.

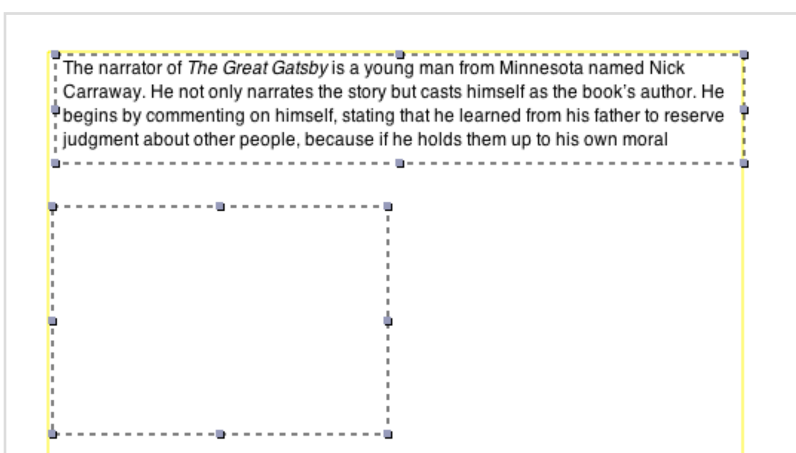


Figure 18-32: *Two Text Boxes Selected*

3. Click Format from the menu bar.
4. Click Make Flow. The text will automatically flow into the next box.

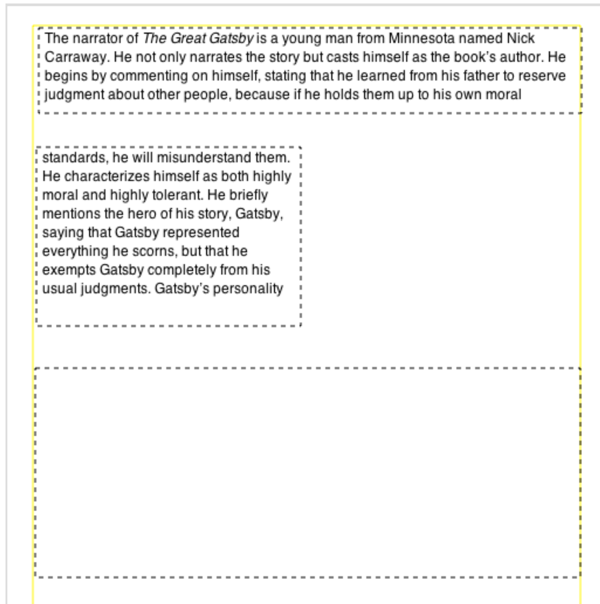


Figure 18-33: *First Flow*

Creating a Second Flow

1. Click on the second text box.
2. Hold down the Shift key and click on the last box.

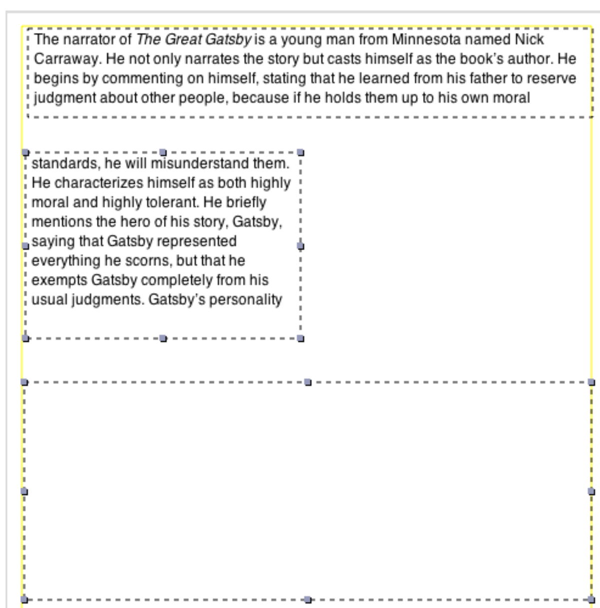


Figure 18-34: *Second Flow Text Boxes Selected*

3. Click Format from the menu bar.
4. Click Make Flow. The text will flow into the third box.

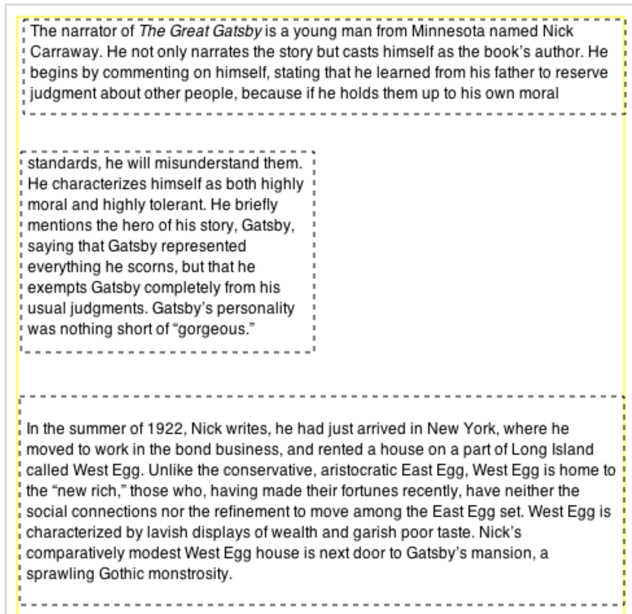


Figure 18-35: *Completed Flows*

Displaying Flows

To see how the text boxes are flowing on the template, hold down the Control key and click in the first text box.

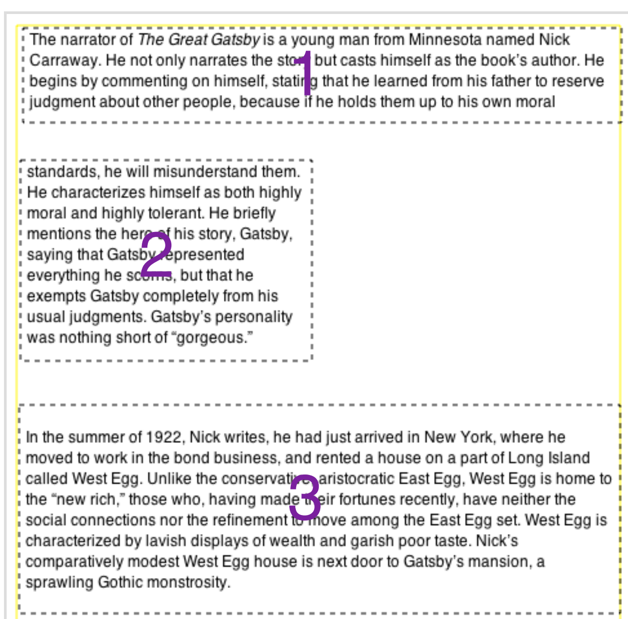


Figure 18-36: *Flow Sequence*

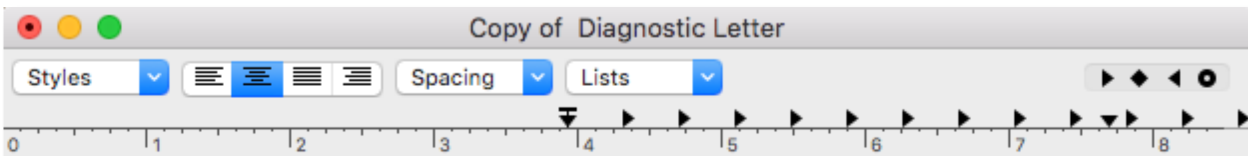
Styles

Just like in word processing applications, topsOrtho has the ability to create styles. Styles are available to use in both templates and generated letters. Creating a style for a font will ensure that all letters and placeholders will generate correctly.

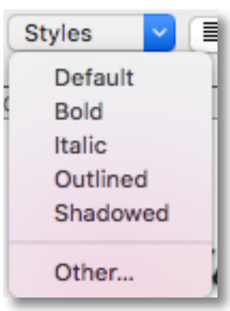
Creating Styles

Styles are available in the ruler. In order for the ruler to display, a text box must be selected with the blinking mouse cursor visible.

1. Click on a text box in your template.
2. Double-click to display the blinking mouse cursor.
3. Click Format from the menu bar.
4. Click Ruler, Show Ruler.



5. Click the down arrow to the right of Styles. There are five built-in styles that are favorites. Each time a style is created, add them to the favorites list.



Default–Left aligned, single spacing.
Bold–Apply bold to selected text.
Italic–Apply italics to selected text.
Outlined–Apply outlining to selected text.
Shadowed–Apply a shadow to selected text.
Other...–Add/Delete styles to/from your favorites.

Creating a Default Font Style

1. Double-click to select a word in a text box.

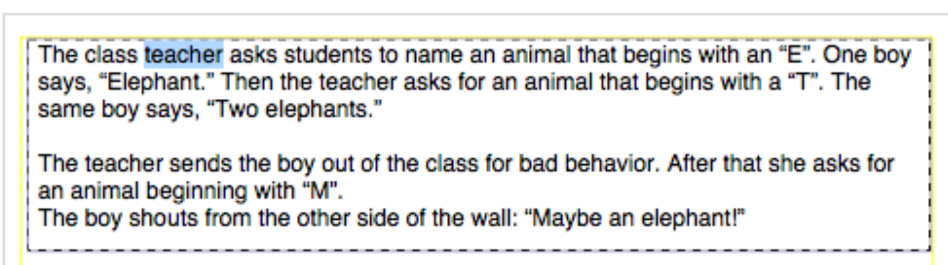


Figure 18-37: *Selected Word*

2. Click Format from the menu bar.
3. Click Font, Show Fonts.

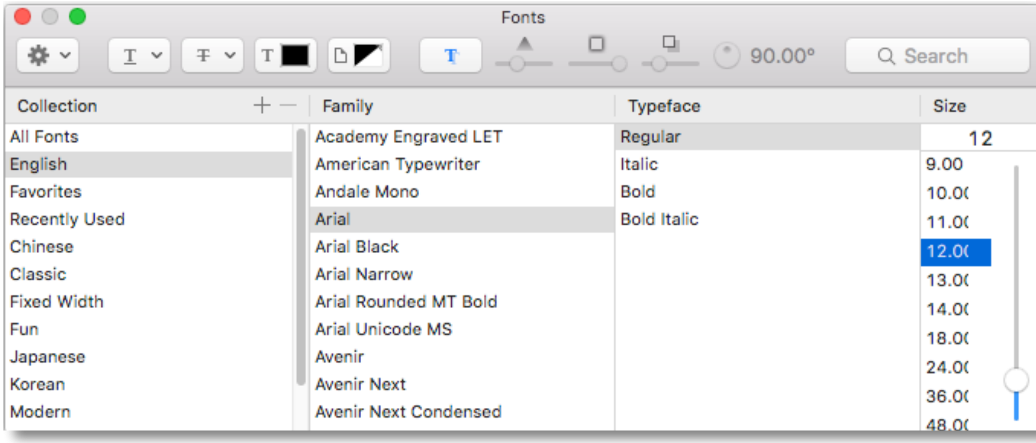
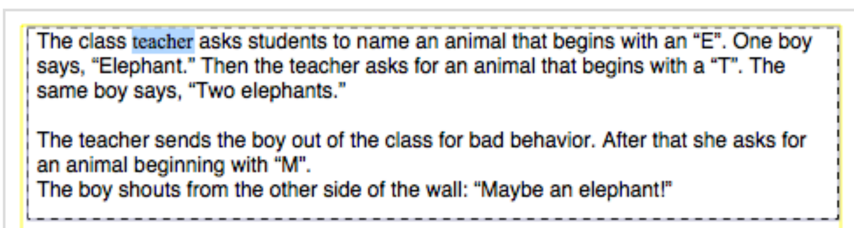


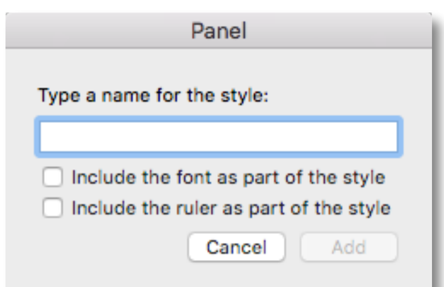
Figure 18-38: *Font Choices*

The selected word is Helvetica, Regular, 12 pt. typeface. The chosen font for an office may be Times New Roman, Regular, 12 pt.

4. Scroll down in the middle column until Times New Roman is visible and click on it.
5. Verify that Regular is selected in the Typeface column.



6. Verify 12 is selected in the Size column.
7. With the word still selected, click Styles from the ruler.
8. Click Other.
9. Click the Add to Favorites button.

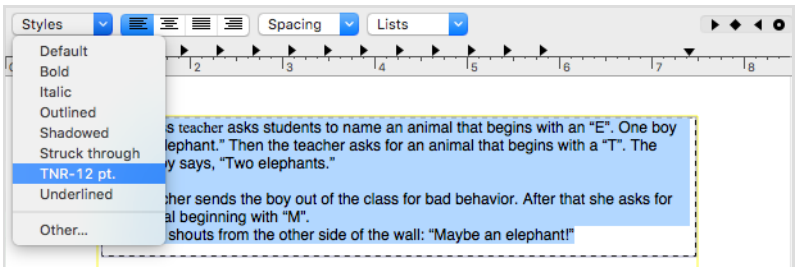


10. Enter a descriptive name for your style, e.g., TNR–12 pt.
11. Check the box to Include the font as part of the style.
12. Do not check the box that says Include the ruler as part of the style.
13. Click Add. The style is added to your favorites list.
14. Close the Font window.

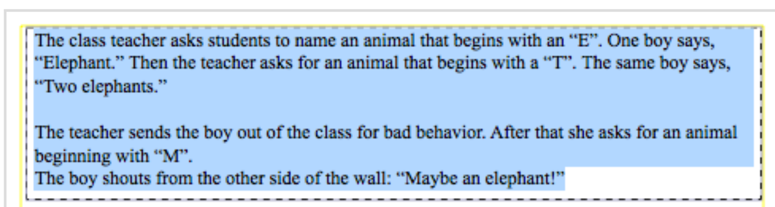
Applying Styles

Once a style has been created it is ready to use in both templates and generated letters.

1. Open a template to apply your character style.
2. Click on a text box.
3. Double-click to see the blinking cursor.
4. Click Format from the menu bar.
5. Click Ruler, Show Ruler (if necessary).
6. Hold down Control +A to select all of the text in the box.
7. Click the Styles drop down arrow.



8. Click your newly created style.
9. All of the text is reformatted according to your style preferences.



Creating a Bullet Style

If you use bullets in your letters, a bullet style can be created and then assigned once a letter is generated. The bullets will be consistent throughout the correspondence.

1. Create a new letter and type a list, similar to the below figure.

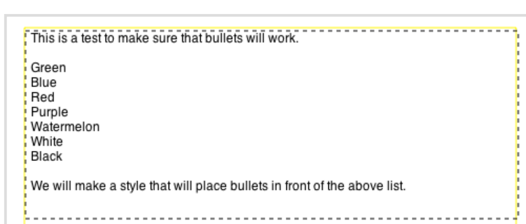


Figure 18-39: *List for Bullets*

2. Click on the text box to select.
3. Double-click to display the blinking cursor.
4. Click Ruler, Show Rulers.
5. Double-click to select the first word in the list.

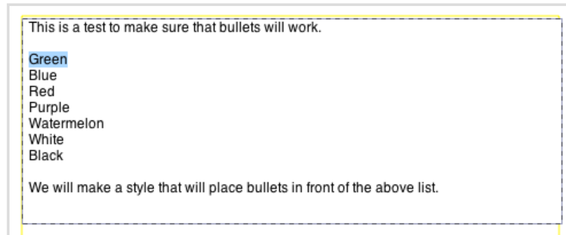


Figure 18-40: *Selected Word in List*

6. Click List item from the Ruler.
7. Click the bullet you would like to place in your letter. The selected word will be tabbed to the right with the bullet in front.

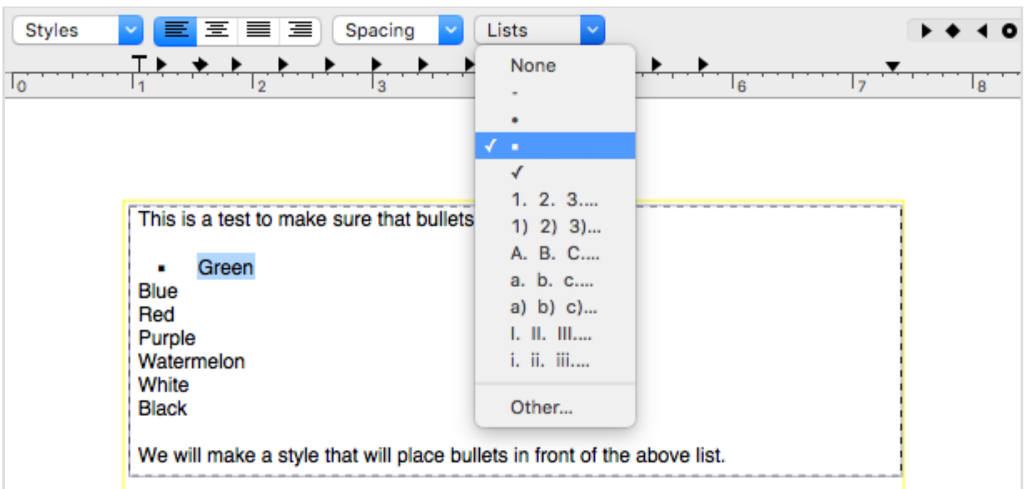


Figure 18-41: *Bulleted First Word*

Notice the ruler at the top. The bullet is aligned with the first tab stop and the word is aligned with the triangle pointing down. This triangle represents the balance of the line. If you have bulleted text that's more than one line long, the text will wrap according to the down pointing triangle.

▬ The first line of a paragraph

▼ The balance of a paragraph

8. With the word still selected, click the Styles from the ruler.
9. Click Other.
10. Click Add to Favorites button.
11. Enter a descriptive name, e.g. Bullets.
12. If the font is correct, click the box Include the font as part of the style.
13. Do not check the box that says Include the ruler as part of the style. You do not was to restrict your documents to the ruler.
14. Click Add button. The style is added to the Style favorites list.

Applying the Bullet Style
When applying a bullet style, there is one key point to remember. You must first apply the style, *then apply the type of bullet you need*.

1. Select all of the text that you would like to add a bullet to.

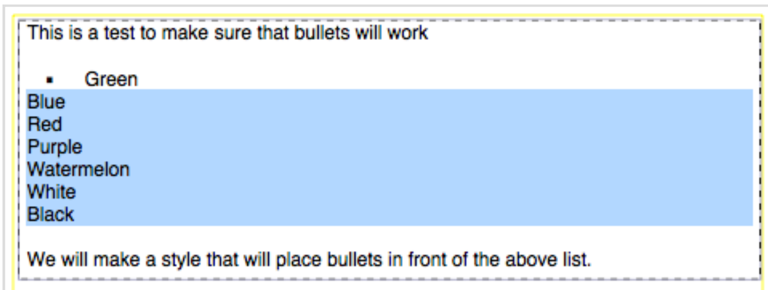
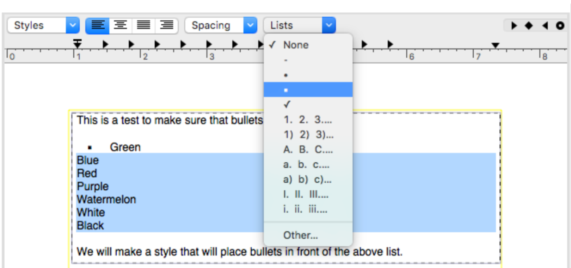


Figure 18-42: *Balance of List Selected*

2. Click Styles from the ruler.
3. Select the style you just created, in this case Bullets.

   It will appear that the style did not apply. topsOrtho will not align until a bullet shape is selected.

4. Click Lists from the ruler.
5. Click on the bullet you would like to apply. The list will align correctly.



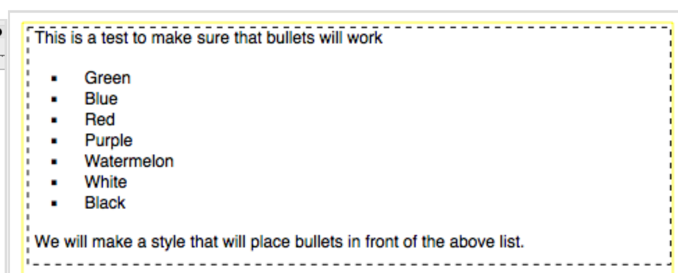


Figure 18-43: *Select the Bullet Shape*

Figure 18-44: *Completed Bulleted List*

Copying Rulers
If a template has been created that contains the correct tab stops it can be copied and pasted in another document.

1. Select the paragraph (triple-click) in the letter that has the correct tab stops.
2. Click Format from the menu bar.
3. Click Ruler, Copy Ruler.
4. Select the paragraph (triple-click) to which you would like to apply the ruler.
5. Click Format from the menu bar.
6. Click Ruler, Paste Ruler.

Masking Letterhead on Page Two
When applying a letterhead background in topsOrtho, it will be applied to all the pages in a document. If you have a two-page letter, it is not always acceptable to have your letterhead as page two. In order to prevent the letterhead from printing on page two, you will create a rectangle and place it in the background to virtually hide your letterhead. There is one thing to remember though, you must change your margins to 0 pts. in order for the letterhead to be hidden.

Applying a Background for a Multi-page Letter

1. Create a new template in topsOrtho using the plus sign at the bottom of the template list in Practice Setup under Letters/Forms.
2. Select 2 pages
3. Select the letterhead from the Background. The following page has the background on 2 pages. The yellow line indicates that the margins have been set at 72 pts.

Figure 18-45: *Multi-page Letter with Letterhead*

Create the text boxes as normal, adding placeholders, and creating a flow from text box one to text box two. Refer to Creating Flows on page 2 of this document for help on flows. Once the flow has been created, notice the text on page 2 overlaps the logo. This is very difficult to read and does not look professional.

4. Have page 2 of your letter on your computer screen.
5. Click the Rectangle tool from the tool-bar. 
6. Draw a rectangle over the entire page, or over the information you would like to cover.

   In the following example, the address located at the bottom of each page will remain visible.

7. With the rectangle selected, click Format from the menu bar.
8. Click Inspector.
9. Click the Fill check box and select the color.
10. Click the Line check box to remove the line.

    The text will disappear. The rectangle needs to be moved to the back.

11. Click Format from the menu bar.
12. Click Send to Back. The rectangle is placed behind the text, covering the letterhead.

Figure 18-46: *Multi-page Letter*

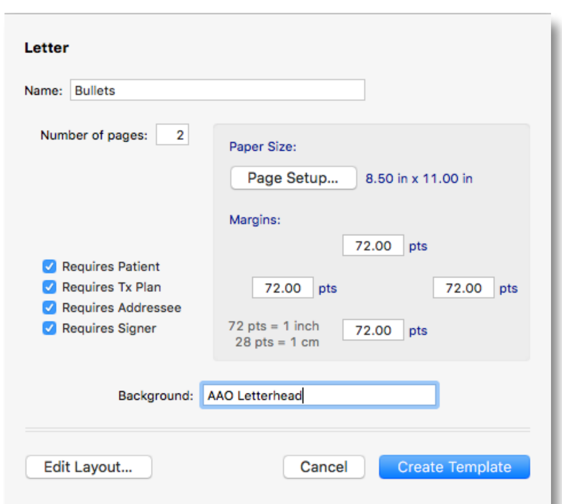
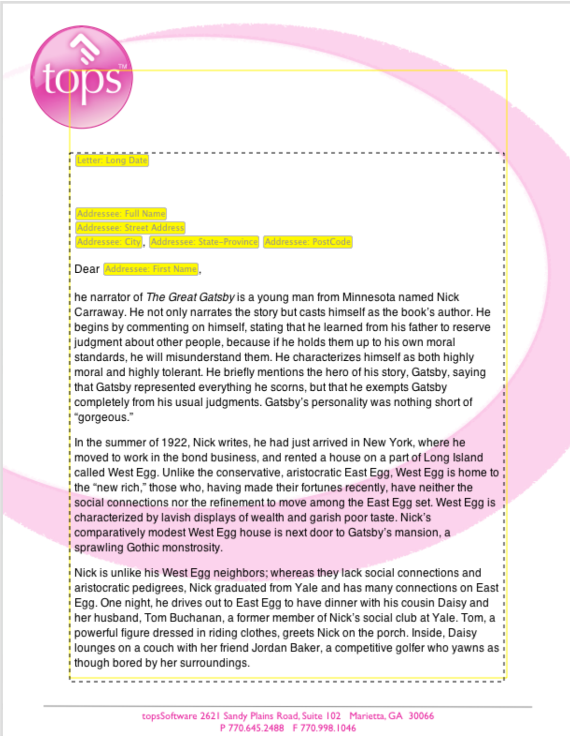


Figure 18-47: *Change Margins*

The margins must be changed to complete this task.

13. Click the Question Mark on the toolbar.
14. Change the margins to ready 0 pts. Your text boxes will remain in the proper position.
15. Save the template.

Once the letter is created from the template, it should look similar to the following figure.


tops™

Letter: Long Date

Addressee: Full Name
Addressee: Street Address
Addressee: City, Addressee: State-Province Addressee: PostCode

Dear Addressee: First Name,

he narrator of *The Great Gatsby* is a young man from Minnesota named Nick Carraway. He not only narrates the story but casts himself as the book's author. He begins by commenting on himself, stating that he learned from his father to reserve judgment about other people, because if he holds them up to his own moral standards, he will misunderstand them. He characterizes himself as both highly moral and highly tolerant. He briefly mentions the hero of his story, Gatsby, saying that Gatsby represented everything he scorns, but that he exempts Gatsby completely from his usual judgments. Gatsby's personality was nothing short of "gorgeous."

In the summer of 1922, Nick writes, he had just arrived in New York, where he moved to work in the bond business, and rented a house on a part of Long Island called West Egg. Unlike the conservative, aristocratic East Egg, West Egg is home to the "new rich," those who, having made their fortunes recently, have neither the social connections nor the refinement to move among the East Egg set. West Egg is characterized by lavish displays of wealth and garish poor taste. Nick's comparatively modest West Egg house is next door to Gatsby's mansion, a sprawling Gothic monstrosity.

Nick is unlike his West Egg neighbors; whereas they lack social connections and aristocratic pedigrees, Nick graduated from Yale and has many connections on East Egg. One night, he drives out to East Egg to have dinner with his cousin Daisy and her husband, Tom Buchanan, a former member of Nick's social club at Yale. Tom, a powerful figure dressed in riding clothes, greets Nick on the porch. Inside, Daisy lounges on a couch with her friend Jordan Baker, a competitive golfer who yawns as though bored by her surroundings.

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Tom tries to interest the others in a book called *The Rise of the Colored Empires* by a man named Goddard. The book espouses racist, white-supremacist attitudes that Tom seems to find convincing. Daisy teases Tom about the book but is interrupted when Tom leaves the room to take a phone call. Daisy follows him hurriedly, and Jordan tells Nick that the call is from Tom's lover in New York.

After an awkward dinner, the party breaks up. Jordan wants to go to bed because she has a golf tournament the next day. As Nick leaves, Tom and Daisy hint that they would like for him to take a romantic interest in Jordan.

When Nick arrives home, he sees Gatsby for the first time, a handsome young man standing on the lawn with his arms reaching out toward the dark water. Nick looks out at the water, but all he can see is a distant green light that might mark the end of a dock.

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Figure 18-48: *Page 1 & 2*

Aligning Objects

If there are several objects on a letter and they need to be aligned in a specific way, this can be accomplish this with a few clicks of the mouse. In the following example, the boxes need to be aligned with their tops in a straight line. In order for them to align, the box that is in the proper position must be selected first. The object selected first dictates how the rest will align.

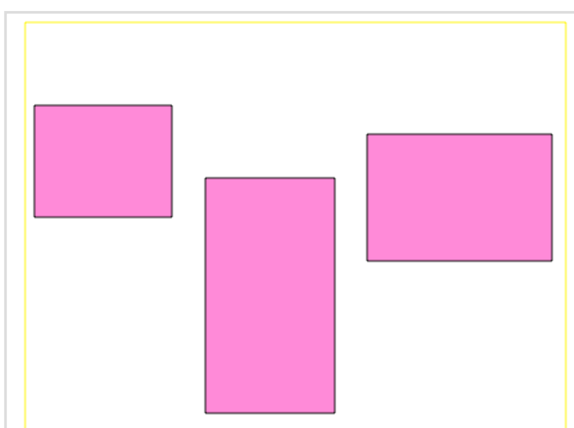


Figure 18-49: *Objects to Align*

1. Click the first object that is aligned properly.
2. Hold down the Shift key and select the remaining objects. They will all be selected.
3. Click Format from the menu bar.
4. Click Align and Size Objects, Top Edges. Your objects will align.

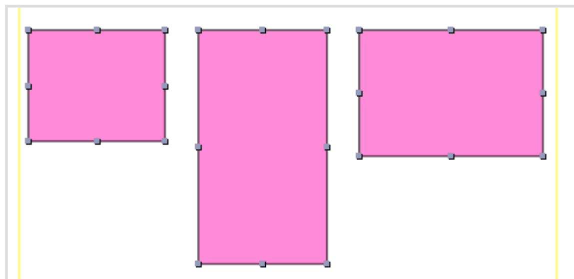


Figure 18-50: *Aligned Objects*

Summary

In this lesson, you should feel confident with:

- Understanding backgrounds in topsOrtho
- Using Forms
- Creating and customizing letter templates
- Creating Flows
- Masking letterhead on the second page of a document

Lesson 19 Off-the-Charts™

Lesson Nineteen Overview

This lesson focuses on Off-the-Charts™. The topsOrtho Off-the-Charts feature gives you direct access to Patient Rewards Hub™ from Practice Genius™, Clincheck® Web from Invisalign®, suresmile™, and Braces Academy. Those web apps are built right into tops!

Objectives:

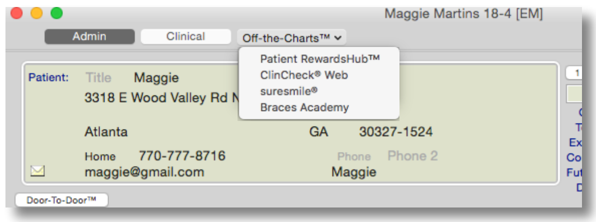
To become familiar with Off-The-Charts, you will:

19A Introduction to the Off-The-Charts
All items, and how to get started and use Patient Rewards Hub™ from Practice-Genius™, Clincheck® Web from Invisalign®, suresmile®, and Braces Academy in topsOrtho!

19A Introduction to the Off-the-Charts™

With Off-the-Charts you can quickly and easily access Patient Rewards Hub from PracticeGenius, Invisalign, suresmile® cases, and Braces Academy.

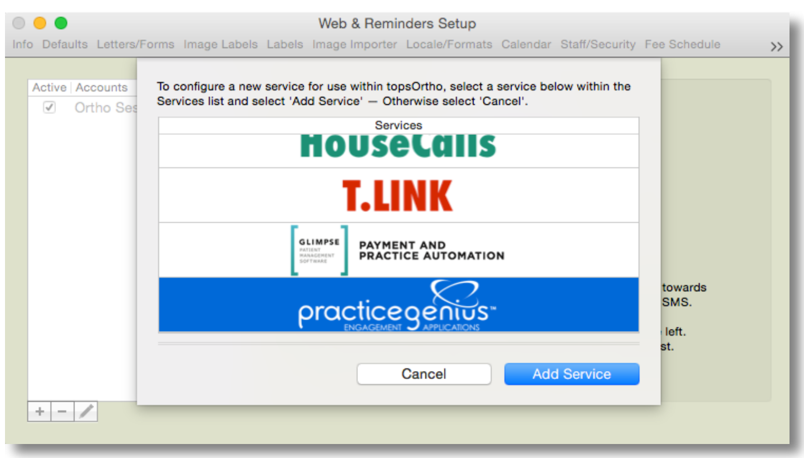
From the topsOrtho Admin window, click the Off-the-Charts button, select the web app, enter your password, and that's it! You're connected right inside of tops!



Patient Rewards Hub from Practice Genius™
How to Set up Patient Rewards Hub for Off-the-Charts

To connect to Patient Rewards Hub from PracticeGenius you'll need to activate it in Practice Setup…

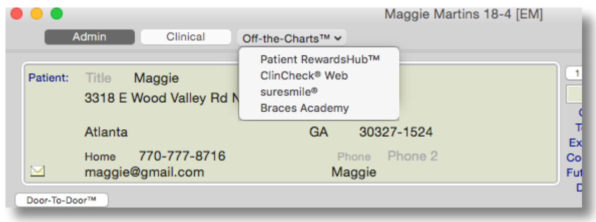
1. Navigate to ***Practice Setup…*** & enter your topsOrtho ***password***.
2. Select ***Web & Reminders***.
3. Click the ***plus button***, to add a service.
4. Select ***PracticeGenius*** & click ***Add Service***.



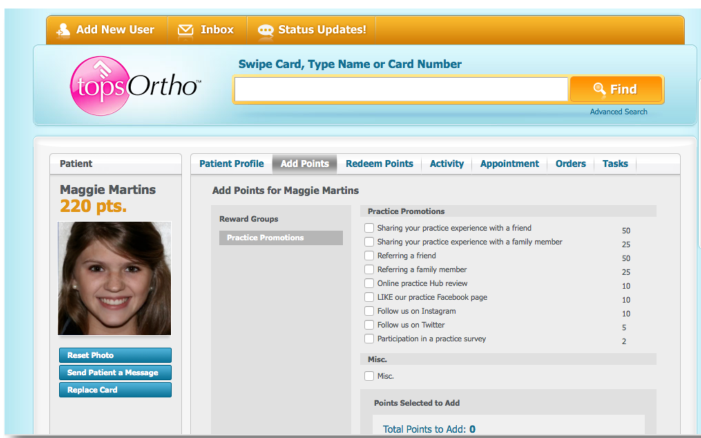
5. Enter your Patient Rewards Hub ***User* name** & ***Password***. Verify the User name and Password are correct. Note: if they are not correct, your patient's records will not display in the Off-the-Charts window.
6. Click ***Enable Service***.

How to Use Patient Rewards Hub for Current Patients

1. From the Admin window, click the ***Off-the-Charts button***, select ***Patient Rewards Hub***.



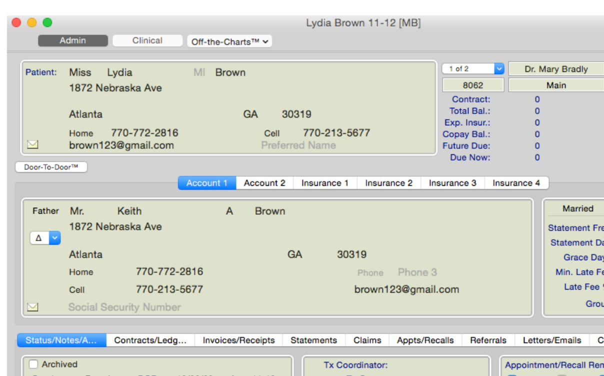
2. Enter your Patient Rewards Hub ***User name*** & ***Password*** the first time you log in for the day.
3. The Patient Rewards Hub page will display.
4. Simply add points and you're good to go.



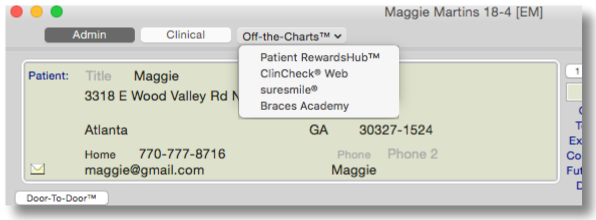
NOTE- If the Patient Rewards Hub records are not displayed, go back to Practice Setup and verify the Patient Rewards Hub User name and Password are correct.

How to Use Patient Rewards Hub for New Patients

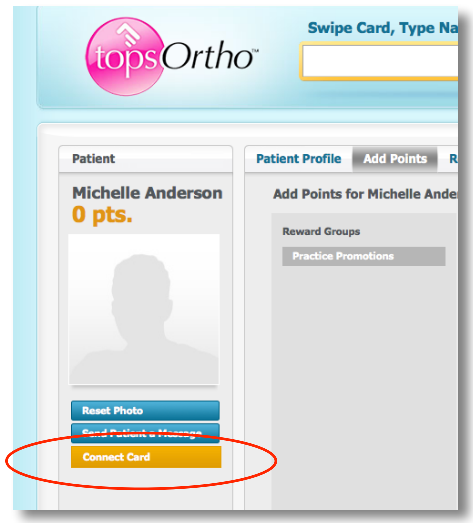
1. Add the new patient information in topsOrtho and make sure you enter all of the necessary information like email address, home & cell phone numbers, photo, etc. so it will be pre-filled in the Patient Rewards Hub page.
2. Be sure the patient and account holder info is complete so it's all transferred to the Patient Rewards Hub.



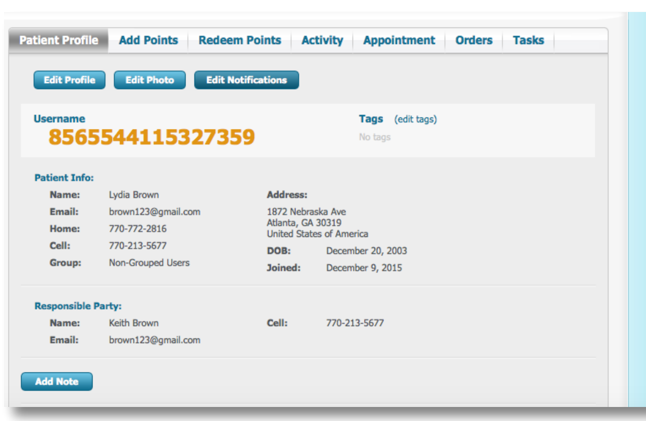
3. When ready, from the Admin window, click the ***Off-the-Charts button***, select ***Patient Rewards Hub***.



4. And the patient profile will be created automatically in the Patient Rewards Hub.

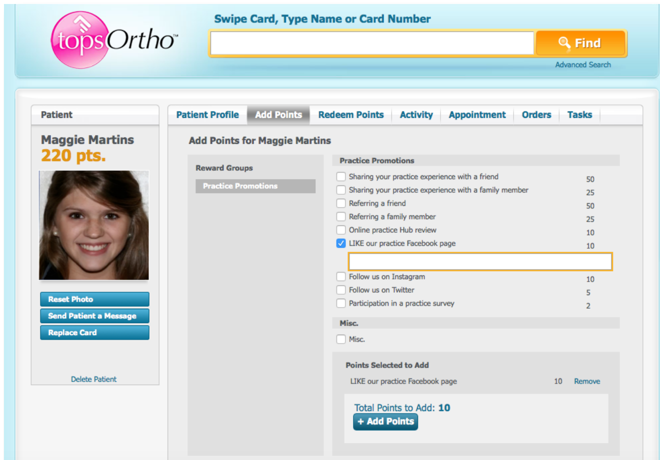


5. To link a card, click the ***Connect Card button.***
6. Either swipe a ***card*** or manually enter the ***card number.***



7. The information in topsOrtho will be added to the Patient Rewards Hub profile. You can add additional information manually.

8. Just add points or send messages per the usual Patient Rewards Hub procedure.

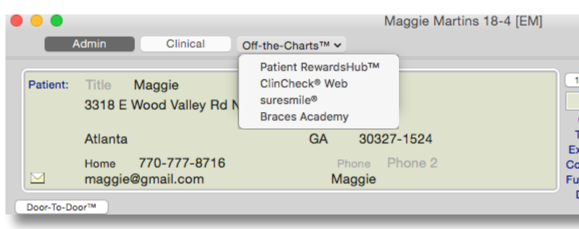


Please note, appointment information is not updated to Patient Rewards Hub, at this time. And once a Patient Rewards Hub page is created, if changes made in topsOrtho to patient or account holder information those changes will not be updated in the Patient Rewards Hub.

Clincheck® Web from Invisalign®

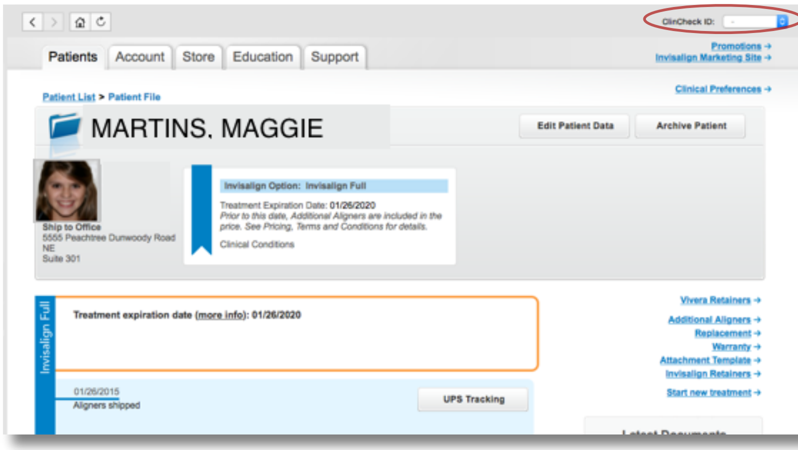
How to Use Invisalign Clincheck Web

1. From the Admin window, click the ***Off-the-Charts button***, select ***Patient ClinCheck Web***.

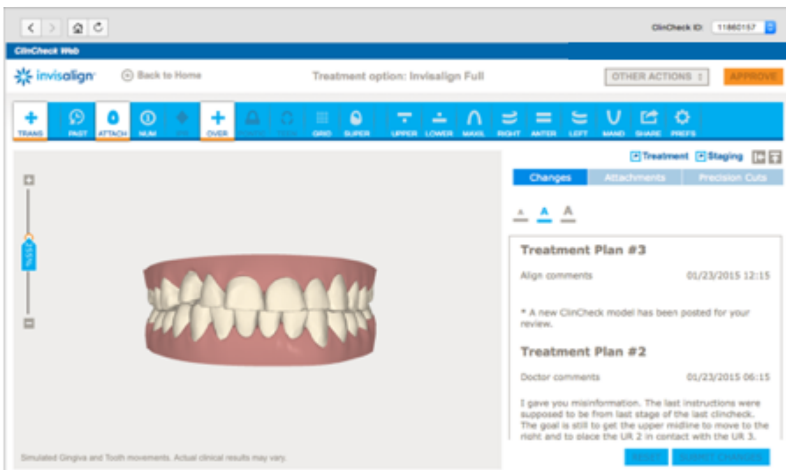


2. Enter your Invisalign ***User name*** & ***Password*** the first time you log in for the day.

3. Search for your patient by name and birthdate and their record will be displayed. If there are multiple matches, select the correct record.

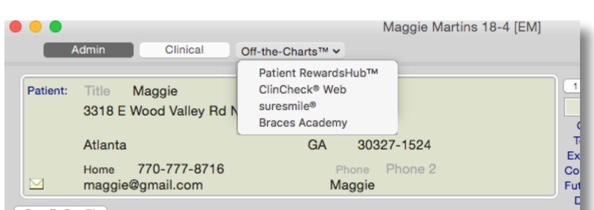


4. Click the ***ClinCheck ID dropdown*** and view your patient's ClinCheck Treatment Plans. You have full access to all the ClinCheck Web tools.

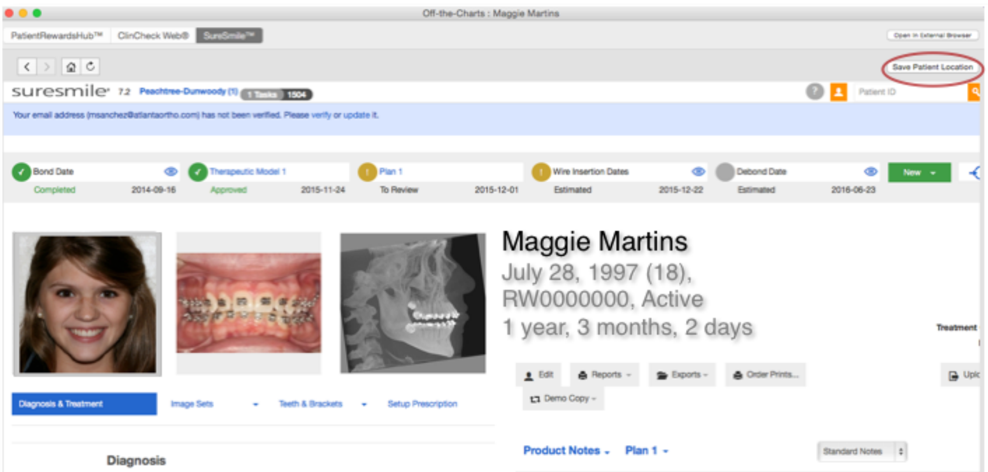


suresmile®
How to Use suresmile® Web

1. From the Admin window, click the ***Off-the-Charts button***, select ***suresmile®***.



2. Enter your suresmile® ***User name*** & ***Password*** the first time you log in for the day.
3. You will need to connect your patient and their suresmile® record the first time you access each patient. To do so, search for the ***patient*** and when you find them, click the ***Save Patient Location*** button in the upper right of the window.

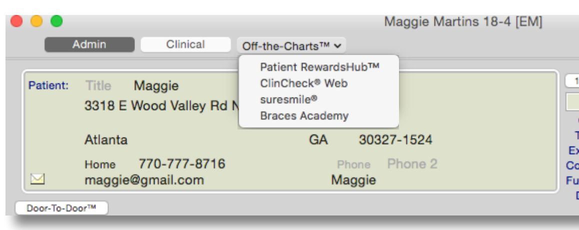


4. The next time you access that patient's suresmile® record within Off-the-Charts, it will open automatically. You have full access to all the suresmile® Web tools.

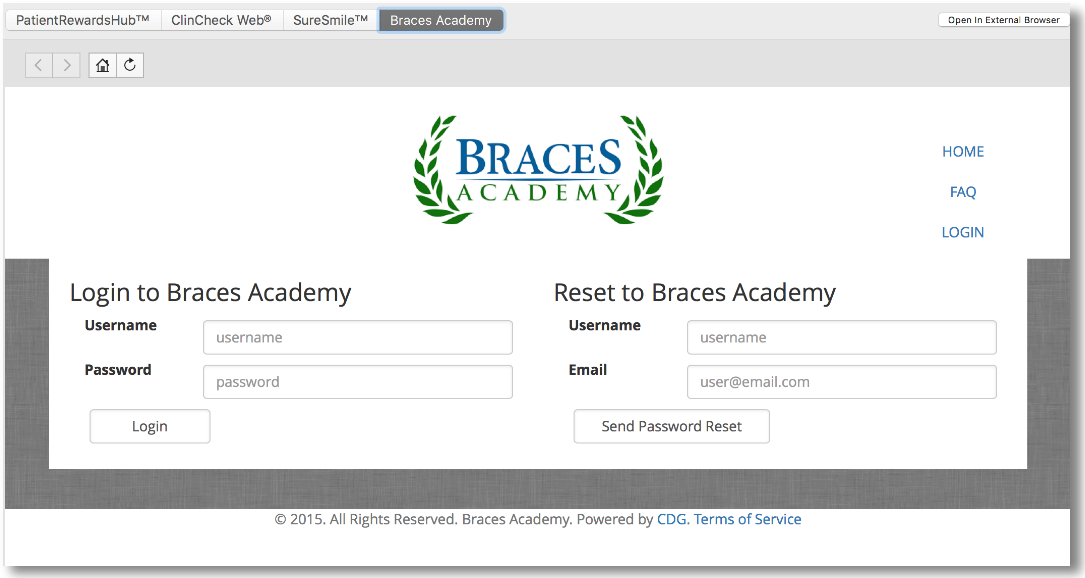
Braces Academy

How to Use Braces Academy Web

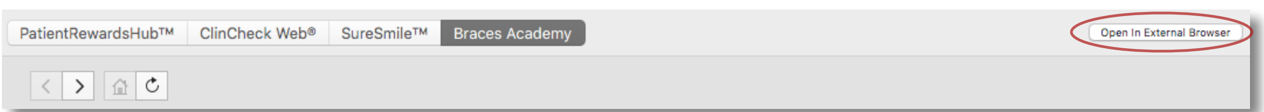
1. From the Admin window, click the ***Off-the-Charts button***, select ***Braces Academy***.



2. Enter your ***username and password*** to access your Braces Academy account.



If Off-the-Charts is not working, click the ***Open in External Browser*** button. This will open a browser window so you can access the web portals. If you still cannot access RewardsHub, Invisalign, suresmile® or Braces Academy check your internet connection.



Summary

In this lesson, you should feel confident with:

- Understanding Off-the-Charts

Lesson 20 topsOrtho and Language Customization

The topsOrtho practice management system is used in orthodontic offices throughout the world, many of which are multi-lingual. It’s easy to modify topsOrtho for your language preference.

Lesson Twenty Overview

This lesson focuses on the language customization in topsOrtho.

Objectives:

To become familiar with the customizing language options, you will:

20A Become familiar with language customization
All items, and how to use them, will be discussed.

20A Changing System Preferences

User Specific Applications
You can select the language you prefer as your keyboard default.

1. Click the Apple from the menu bar.
2. Click System Preferences.
3. Click Language & Region.
4. Click the plus sign (+) to add Preferred languages and drag the languages into the order you prefer.

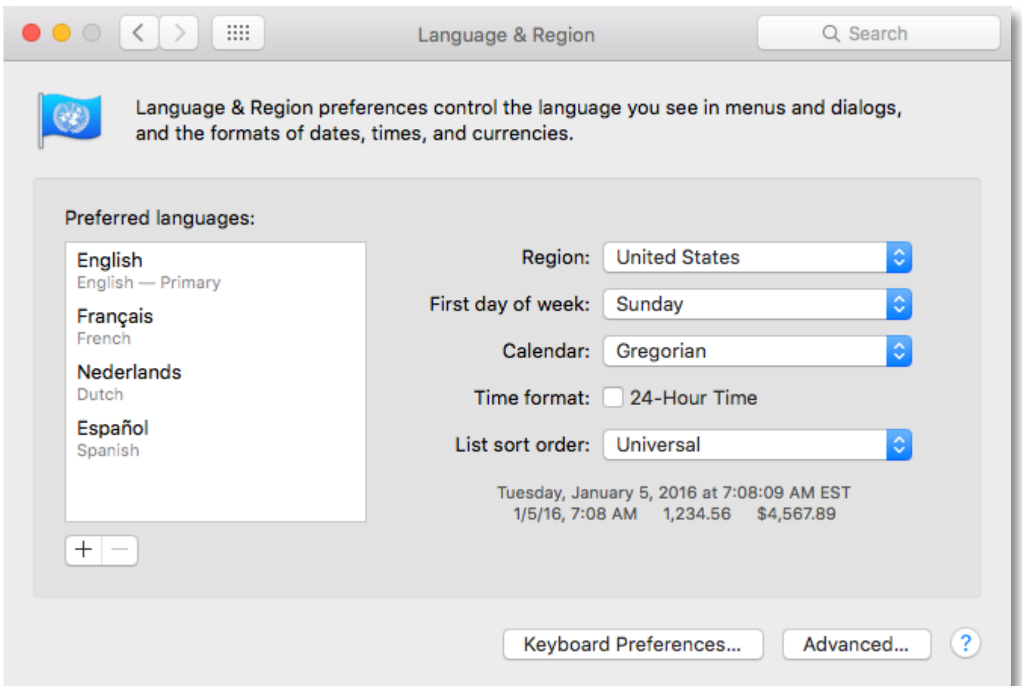


Figure 20-1: *Language & Region Selection Menu*

5. Select your Region, First day of the week, the type of Calendar that you prefer, your Time format and even your List sort order on the right side of the window.
6. Click Advanced if you wish to change the the Dates or Times format. You can also change the numbers, currency and measurement units in the General tab.
7. Close the window.

Viewing the Input Source (the Keyboard)
If you are not sure which keys represent the characters you want, you can display the desired keyboard configuration. This viewer displays the keys that you are using.

1. Click the Apple from the menu bar.
2. Click System Preferences.
3. Click Language & Region.
4. Click Keyboard Preferences…
5. Make sure you are in the Input Source tab.
6. Add a language using the plus sign (+) or click the language that you just added.

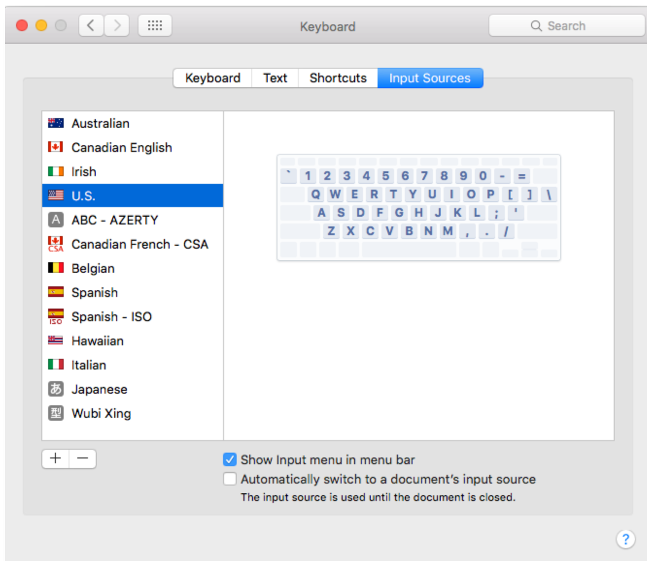


Figure 20-2: *Keyboard Input Sources*

7. Click the box that says Show input menu in menu bar to change easily from one input source to another. Simply click the flag on the menu bar to display the choices. (Optional)

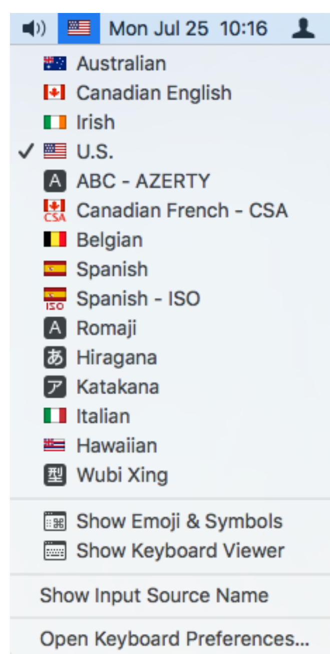


Figure 20-3: *Keyboard Input Sources in Menu Bar*

Creating your Letter Template in topsOrtho

If you'd like to create a letter in a language other than English, use the template creation steps from Lesson 18. With the designated keyboard, it will be easier to create the template in a different language.

Patient-Specific Applications

topsOrtho allows you to print Appointment Slips in many languages, as well as communicate multi-lingually via the Patient Checkin.

Patient's Preferred Language

1. Open Patient Information.
2. Click Status/Notes/Alerts tab, if required
3. Click in the Language field and select the appropriate language.

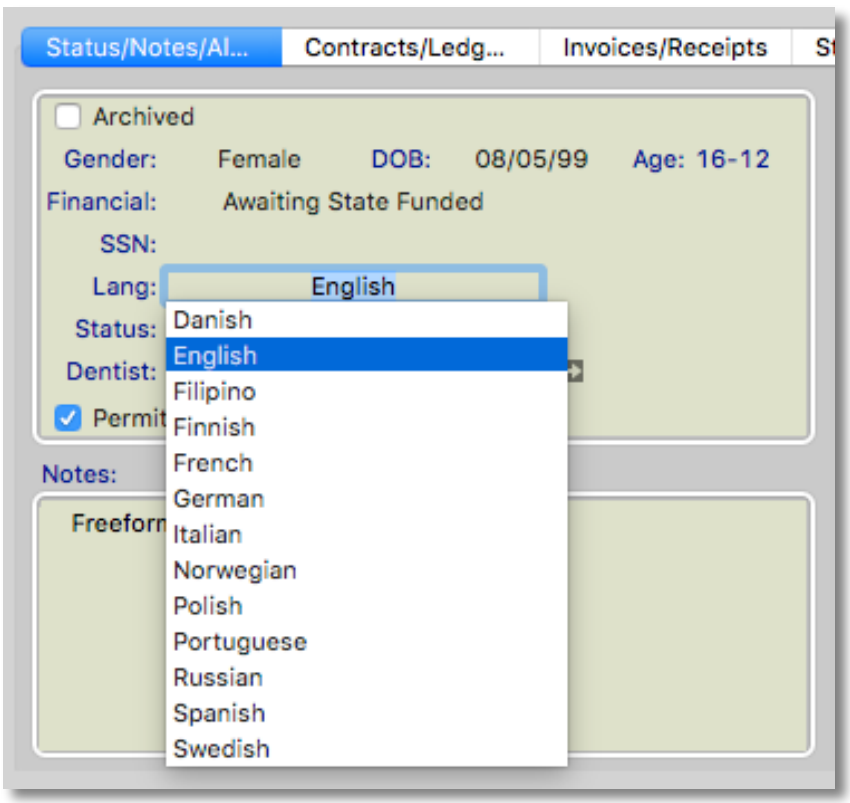


Figure 20-4: *Patient Language Selection*

Appointment Slip Printout
1. Click topsOrtho from the menu bar.
2. Click Practice Setup, enter password.
3. Click Letters/Forms tab.
4. Click Forms.
5. Click Appointment Slip button at the bottom of the window.
6. Click the language you would like to use to define message.
7. Type the correct wording for your message.
8. Click Update Preview button.
9. Click Close Sheet.

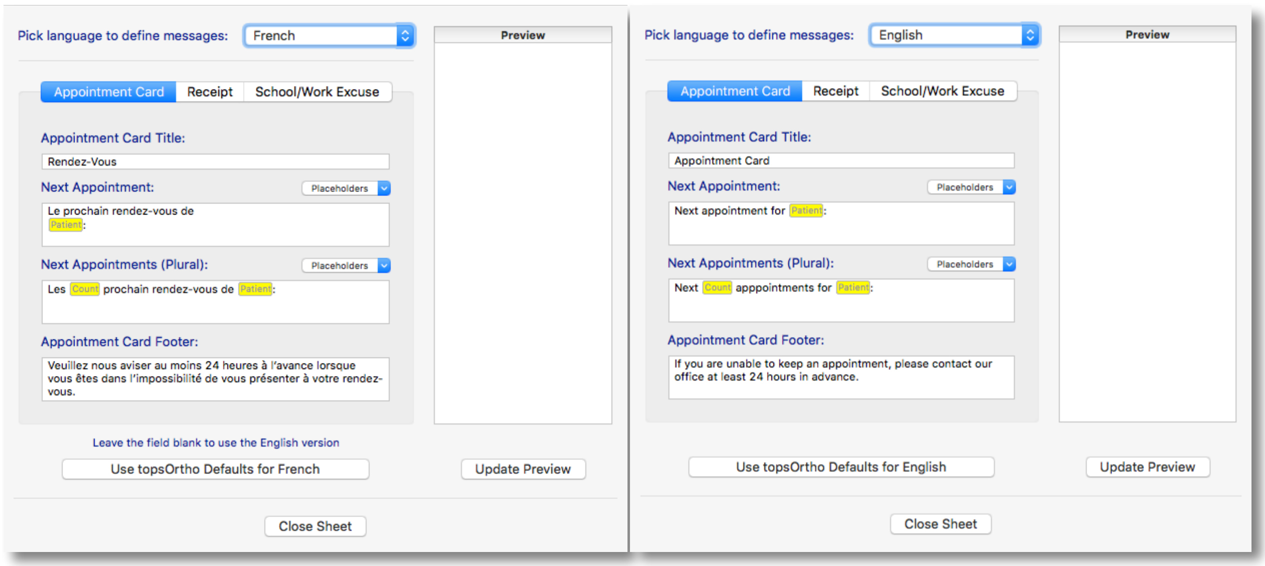


Figure 20-5: *Define language and create messages*

If you select French or Italian, Appointment Slips and the tops Checkin screen will automatically display correctly for your patients. These translations have been provided by topsOrtho clients and are correct, but do not account for any differences in region or dialect. Feel free to change these where appropriate.

Patient Checkin

The Welcome Screen reads the same for all patients. However, you can set the Patient Checkin to address a patient in the language he chooses in the Patient Information window when he signs himself in.

1. Click topsOrtho from the menu bar.
2. Click Practice Setup, enter your password.
3. Click topsCheck-In.
4. Click the Messages tab.
5. Select the language you would like to use.
6. Create the appropriate wording for each language.

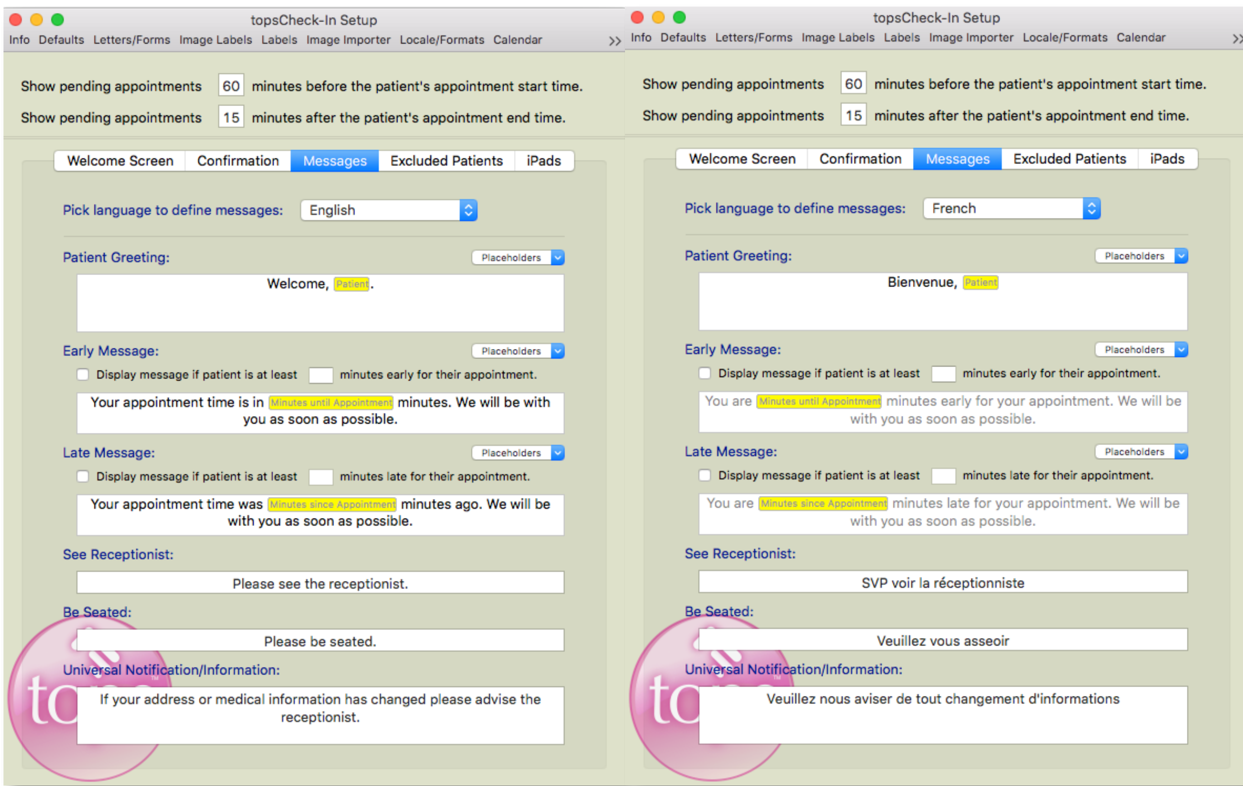


Figure 20-6: *topsCheck-In Language Setup*

Summary

In this lesson, you should feel confident with:

- Customizing language options in topsOrtho

Lesson 21 Analysis of Your Data

Lesson Twenty-One Overview

This lesson focuses on the Matrix Menu and Report Menu items. Each menu is divided into sections, allowing you to find what you need quickly and efficiently.

Objectives:

To become familiar with the matrix and report menu items, you will:

21A **Introduction to the Matrix Menu**
All items, and how to use them, will be discussed.

21B **Introduction to the Report Menu**
All items, and how to use them, will be discussed.

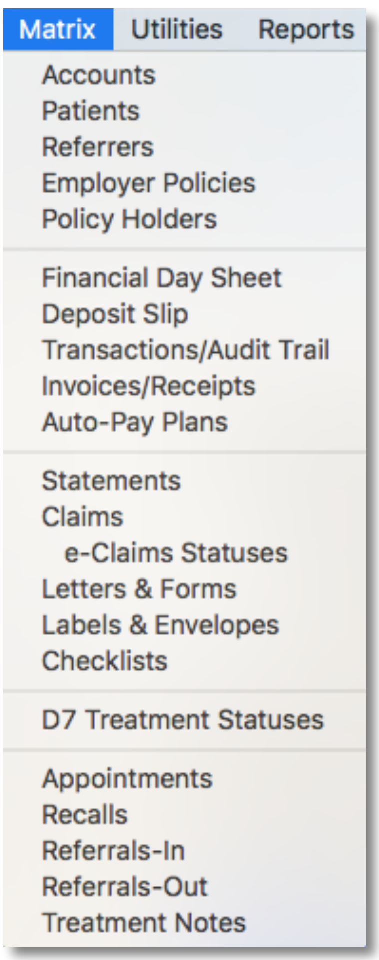
21A Introduction to the Matrix Menu

The Matrix Menu is divided into five areas.

People
Finances
Correspondence
Management of your Practice
Analytics

Each division is designated with a light bar between the areas. You've already had the opportunity to use most of the lists. In the pages that follow, a brief description of each list accompanies a figure.

Matrix Menu



Accounts - List of account holders
Patients - List of patients
Referrers - List of referrers
Employer Policies - List of employers and insurance companies
Policy Holders - List of patient and policy holders
Financial Day Sheet - list of all transactions for one day
Deposit Slip - List of all transactions for a deposit
Transaction/Audit Trail - List of all transactions for a given time period
Invoices/Receipts - Lit of all invoices/receipts for a give time period
Auto Pay Plans - Lis of al patients who use Auto Pay
Statements - List of all patient statements by category
Claims - List of all patient claims by category
e-Claims Statuses - List of e-Claim submission statuses by day
Letters & Forms - List of all letters/forms created for a time period
Labels & Envelopes - Create a label or envelop for a patient or a claim
D7 Treatment Statuses - Interactive treatment status list
Appointments - List of appointments in date range
Recalls - List of all patients with a recall appointment
Referrals-In - List of patients referred by doctors
Referrals-Out - List of patients referred to a specific doctor
Treatment Notes - List of daily treatments notes

Figure 21-1: Matrix *Menu*

Common features

- Columns are sortable by clicking on the column header to show items in alphabetical or numerical order.
- Clicking on up/down arrows to the left of a column header allows you to choose more options to view on the list.
- Lists serve as the other “Reports” database.
- Lists allow you to gather every piece of information about your practice in one location, and to jump from the overview and dig deeper into information about individual entries.
- If the list has disclosing triangles you can click to view more information.
- **Lists** are different from reports in that they can be sorted, filtered, and changed to show variables of the data. **Reports** show a specific snapshot in time and the data cannot be altered to allow for more information. This means that you get a very specific set of information on a report.

Managing People

Accounts

Lists all account holders in topsOrtho along with their phone numbers and addresses.

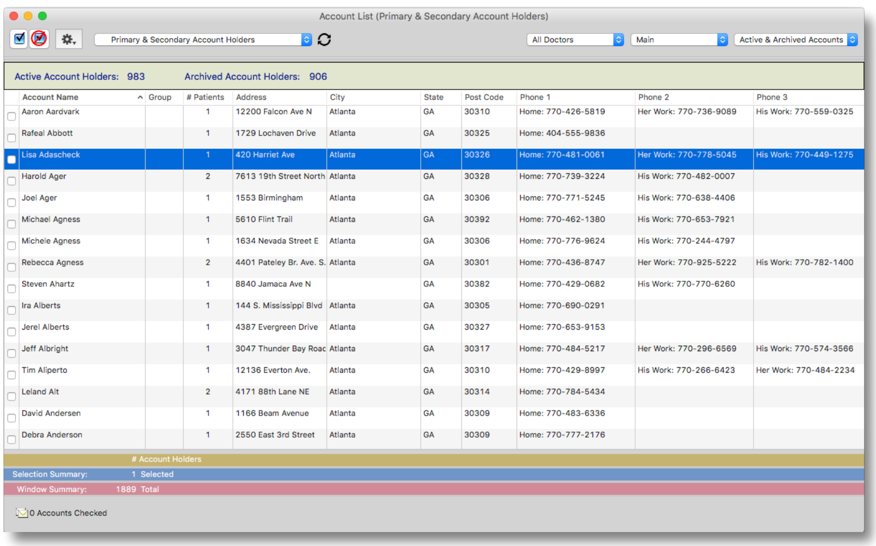


Figure 21-2: *Accounts*

Features:

- Sortable columns
- Notes from the financial alerts window in patient’s information window
- Hot clickable
- Click on the task menu (drop-down) in the upper left corner for more filtering options

Suggested Uses:

- See Archived and Current Account Holders
- Create labels or envelopes for account holders by selecting the desired accounts holders and clicking the envelope icon at the bottom

Patients

Allows you to find and track statistical patient information or sort according to multiple patient parameters.

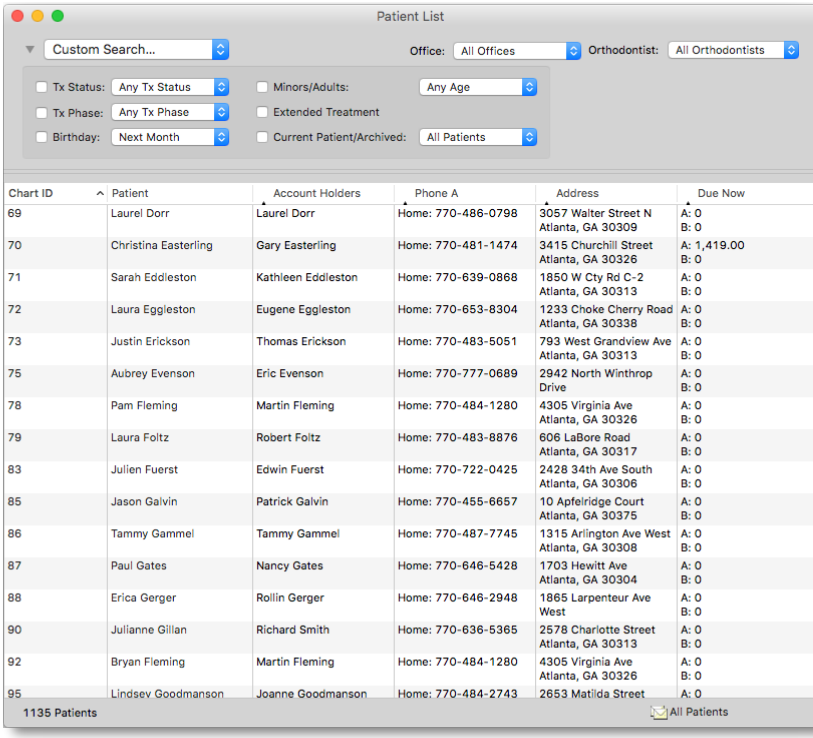


Figure 21-3: *Patients*

Features:

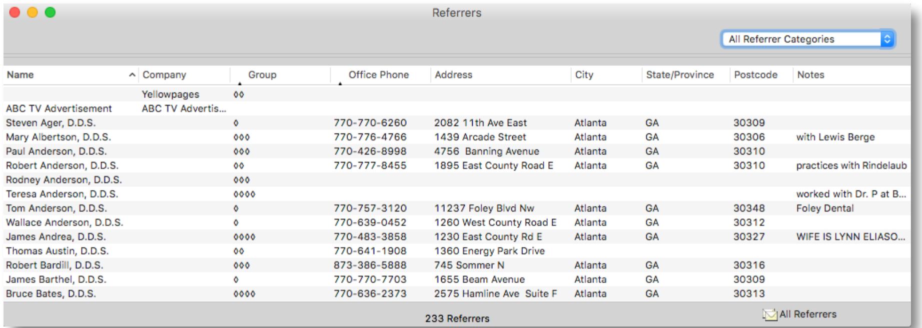
- Sortable columns
- Hot clickable
- Click on the triangle in the upper left corner for a drop-down list of more filtering options
- Create labels or envelopes for patients by selecting the desired patients and clicking the envelope icon at the bottom

Suggested Uses:

- Sort by treatment type
- Show all treatment status
- Show all active or inactive patients
- Show all minors or adults

Referrers

A list of all people entered as a referrer in topsOrtho, along with their phone number, address and category.



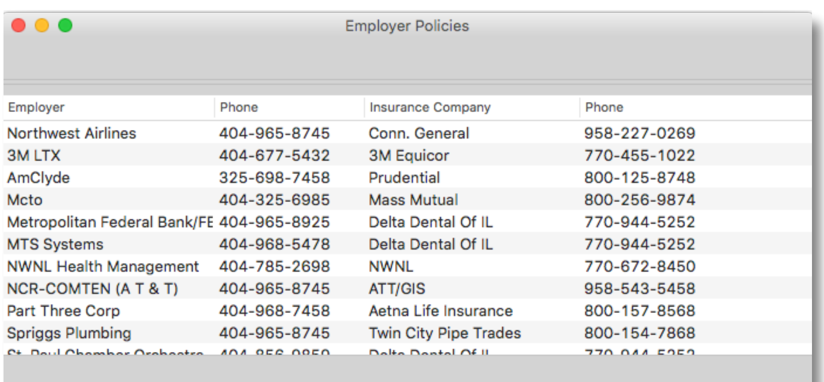
Features:
•Sortable columns
•Hot clickable
•Notes from the referrer information window
•Filter by categories

Figure 21-4: *Referrers*

Suggested Uses:
• Filter by dental specialist

Employer Policies

Listing of all entries defined as an employer policy along with phone numbers of the employer, the insurance company associated with that policy, and the phone number of the insurance company.



Features:
•Sortable columns
•Hot clickable

Figure 21-5: *Employer Policies*

Suggested Uses:
• Find all patients who use the same employer
• View benefit details of a particular policy when answering those questions for other patients

Policy Holders

List of all entries defined as a policy holder in topsOrtho, along with their patients, employers, insurance companies, next claim dates, and remaining benefits. Also shows whether claims are automatically generated for each entry.

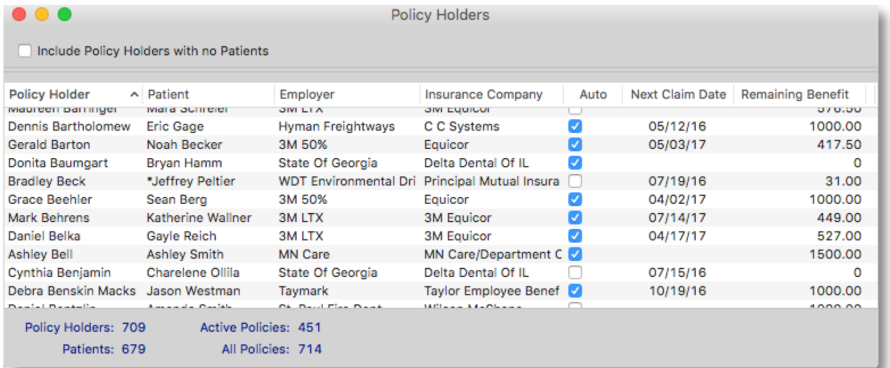


Figure 21-6: *Policy Holders*

Suggested Uses:

- Find the patient associated with a policy holder when an insurance check comes in without the patient's name on it.

Features:

- Sortable columns
- Hot clickable
- View policy holders with no patients

Managing Finances

Financial Day Sheet

Shows all financial transactions (charges, payments, and adjustments) for a given day.

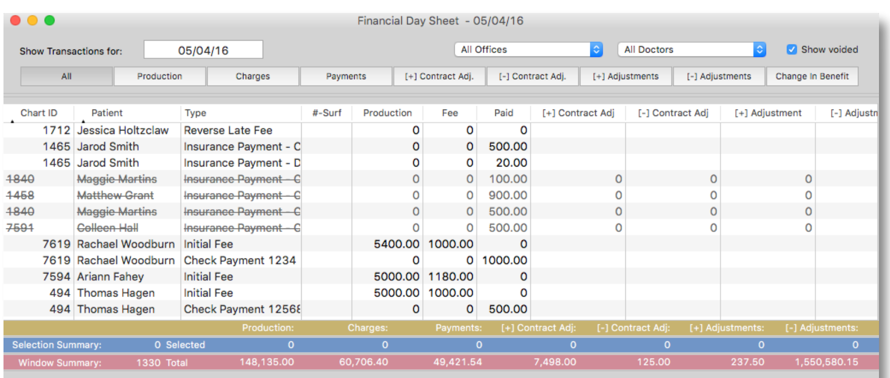


Figure 21-7: *Financial Day Sheet*

Features:

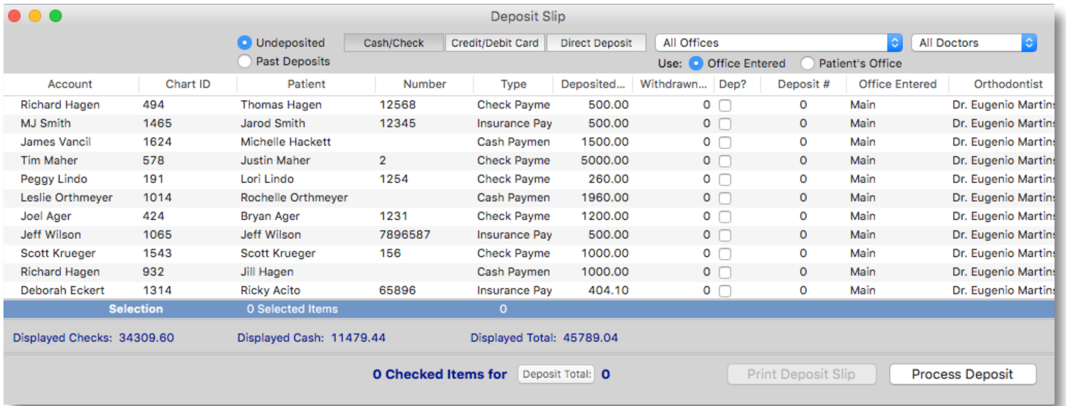
- Sortable columns

Suggested Uses:

- Verify all charges have been entered

Deposit Slip

List all undeposited items for a single day.



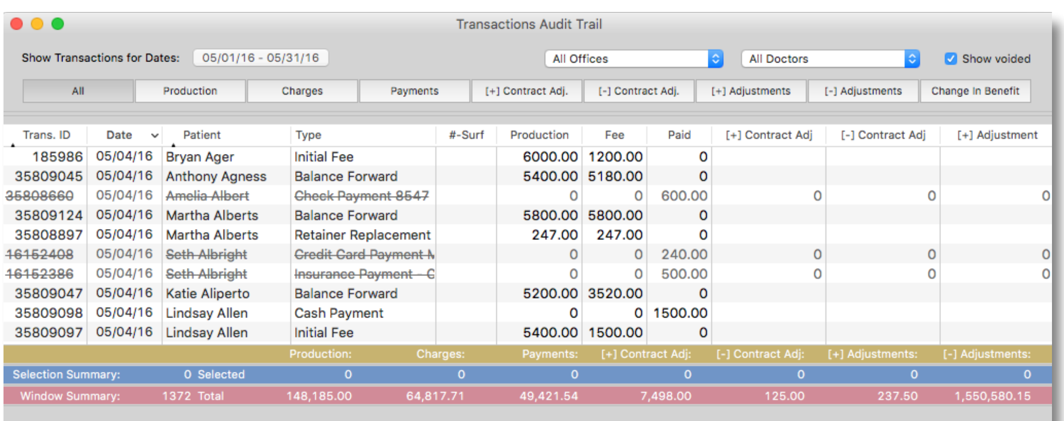
Features:
- Sortable columns
- Filter by category

Figure 21-8: *Deposit Slip*

Suggested Uses:
- Process items that are being deposited each day.
- View deposits by the location where the items were posted or the location the items are credited to.

Transactions/Audit Trail

Financial day sheet in date range format that shows all charges and payments for a given time frame.

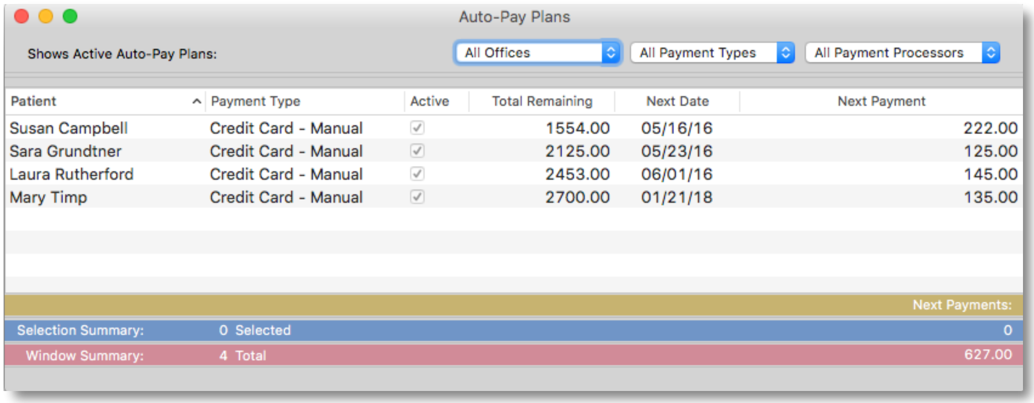


Features:
- Sortable columns
- Filter by transaction type

Figure 21-9: *Transaction/Audit Trail*

Suggested Uses:
- Look up any historical data for any date in the past

Auto-Pay Plans
Shows all patients that have an active auto-pay plan along with the payment type, total remaining on the plan, next date of payment, and the next payment amount.



Features:
- Filter by payment types and processors

Figure 21-10: *Auto-Pay Plans*

Managing Correspondence

Statements
Shows statements created and allows you to print or email.

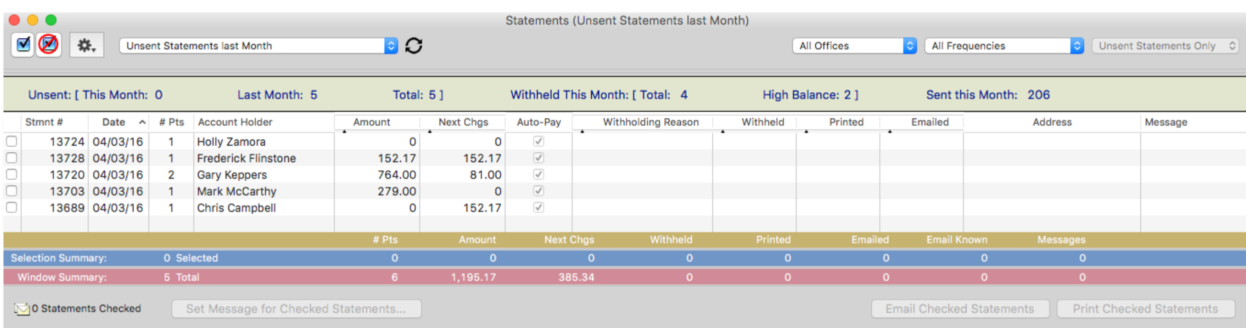


Figure 21-11: *Statements*

Features:
- Sortable columns
- Filter by office and statement status
- Hot clickable to the statement

Claims

Displays what insurance claims are paid, unpaid, or need to be submitted. This list works as a report for tracking all of your insurance claim information.

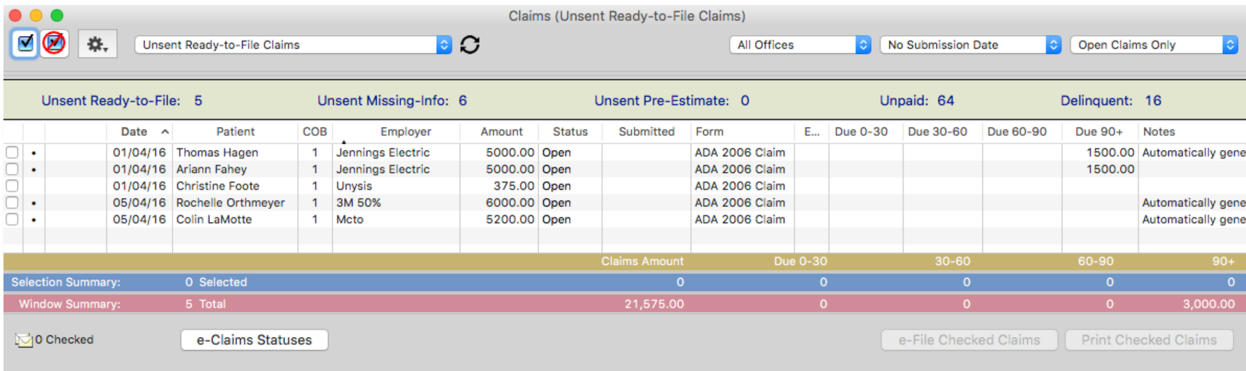


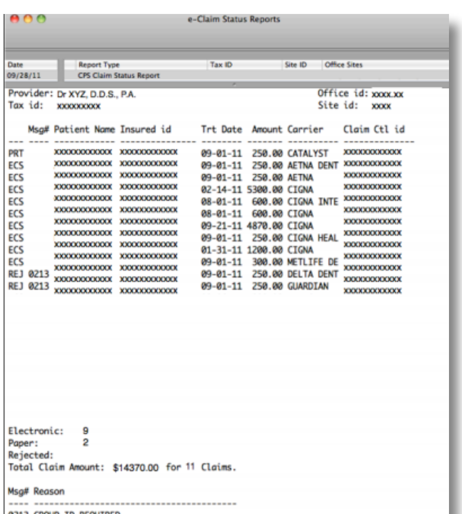
Figure 21-12: *Claims*

Features:

- Sortable columns
- Filter by claim type and claim status
- Hot clickable to the patient's claim list

e-Claims Statuses

Displays e-Claims submission statuses and totals per day. Check these reports daily. Status reports are available 1 business day after a claim is submitted.



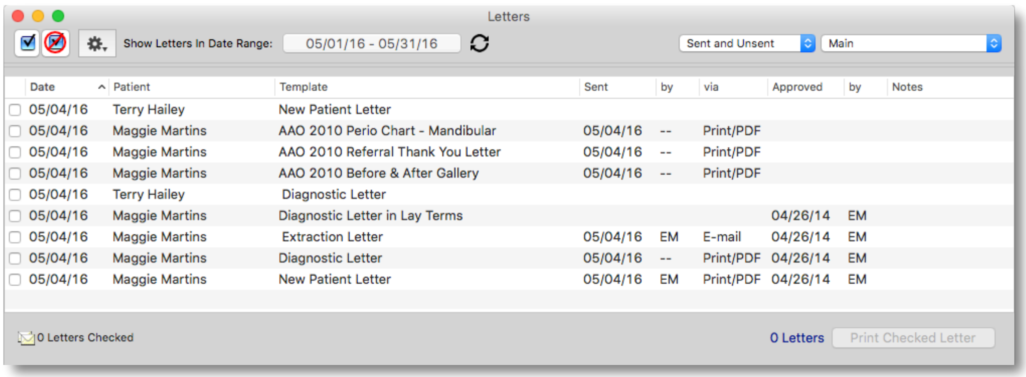
Features:

•Statues by date
•Displays rejections codes, if claims was rejected.
•Displays e-Claims totals per day.

Figure 21-13: *e-Claims Status Reports*

Letters and Forms

Shows all letters created in a specific time frame, along with the date, patient name, type of letter, if it was emailed or printed, and any notes associated with the letter.



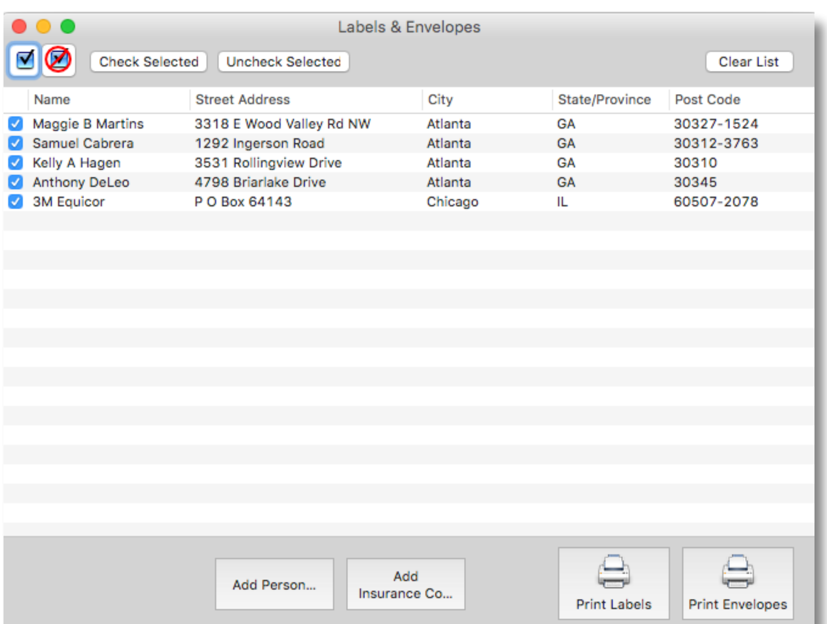
Features:
- Filter by office and status
- Print letters from this list

Figure 21-14: *Letters*

Suggested Uses:
- Keep track of correspondence; what was sent or unsent

Labels and Envelopes

Shows list of labels and envelopes that are ready to print. This list is computer specific meaning that if I create the list on one computer, it is only available on that one computer. You cannot open this same list on any other workstation.



Features:
- Hot clickable to the patient information window
- Print envelopes with or without a return address
- Prints labels with pre-determined label types
- Stores names and addresses for printing all at once

Figure 21-15: *Labels and Envelopes*

Managing Your Practice

D7 Treatment Statuses

D7 Matrix uses multiple dimensions of data to pinpoint patients and dissect your practice information.

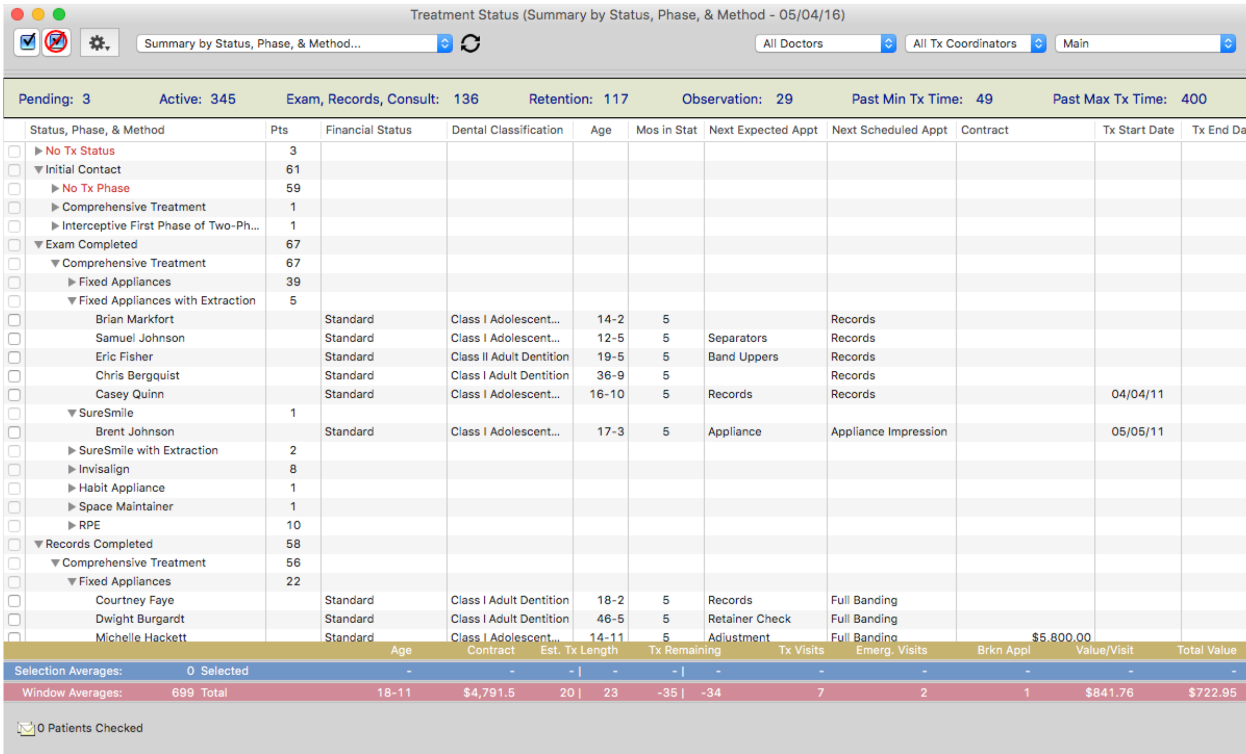


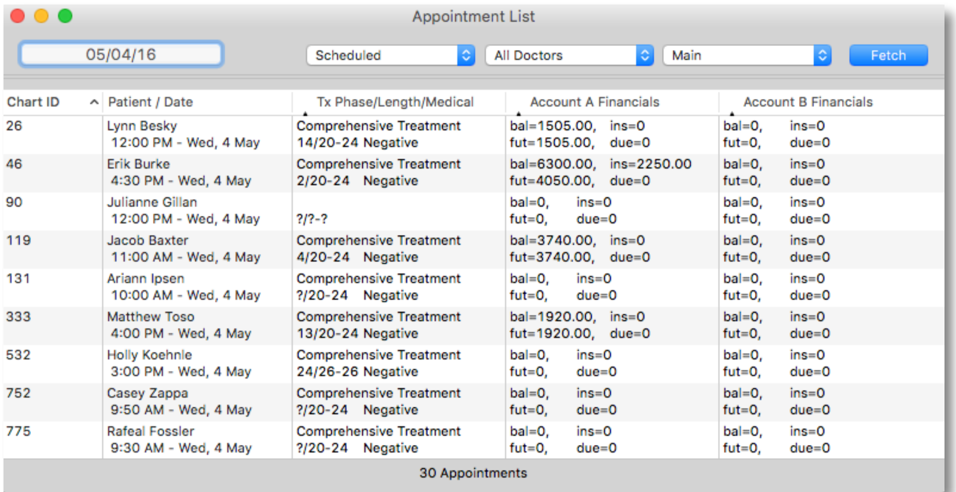
Figure 21-16: *D7 Treatment Status*

Features:

- Task menu with multiple ways to view the D7 Matrix
- Hot clickable, double click to jump to the patient’s Treatment Notes
- Contextual menus, right click on the patient’s name and choose where you’d like go
- Group selections, click & drag to select a group or command click to select various patients
- Sortable columns, click the column header to sort
- Filter by doctor, treatment coordinator, or location
- Overview bar at the top of the window displays today’s totals
- Average and Summary bars at the bottom of the window

Appointments

Manage your schedule by tracking appointment confirmations, financial information for all scheduled patients, and missed appointments.



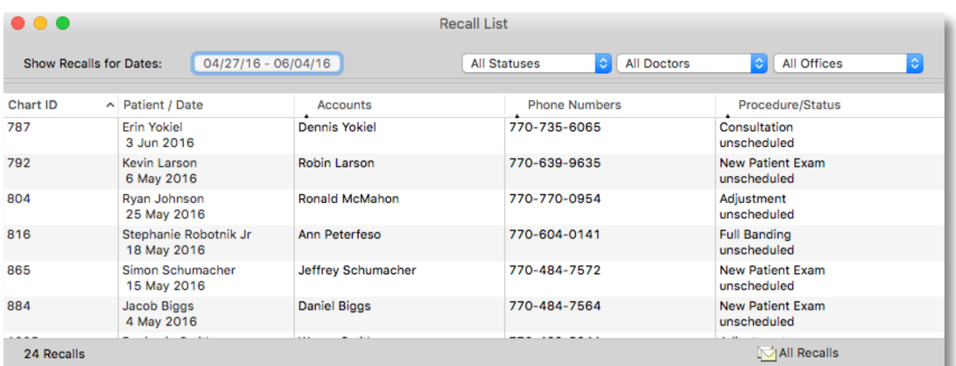
Features:
•Sortable by columns
•Filter to appointment type
•Hot clickable to the appointment book
•Column headers can be changed

Figure 21-17: *Appointment*

Suggested Uses:
• Summarize number of appointments for a date range
• Track missed, rescheduled, or cancelled appointments for a date or date range.
• Track lab work to be sent or that should be back for a given appointment(s).

Recalls

List of patients that need to schedule an appointment or procedure.



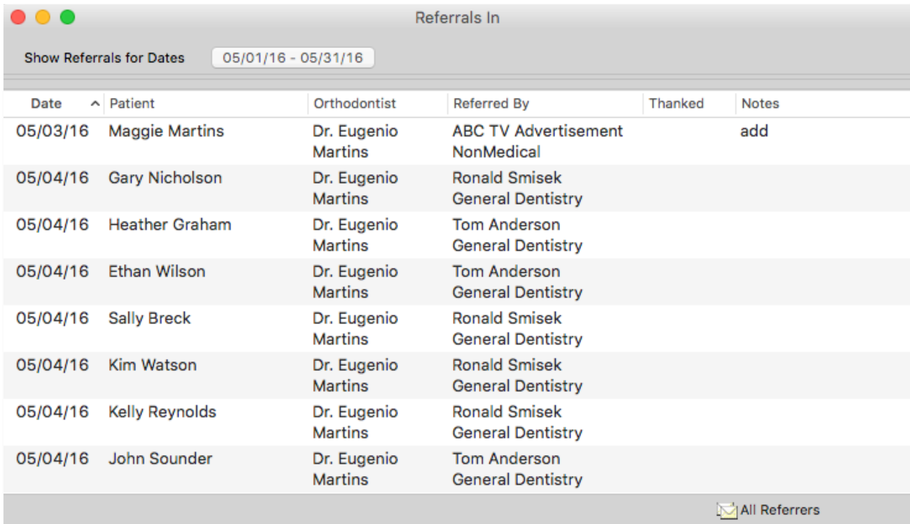
Features:
•Sortable by columns
•Filter by recall status
•Columns can be changed

Figure 21-18: *Recalls*

Suggested Uses:
• Create labels or envelopes directly from list
• Summarize total recalls
• Review scheduled, unscheduled, and total number of recalls for a time period.

Referrals-In/Referrals-Out

Review the patients that have been referred into your practice and those patients who you have referred out to another doctor or specialist. You can see if a letter has been created for communication between yourself and the referrer doctor.



Referrals In

Show Referrals for Dates 05/01/16 - 05/31/16

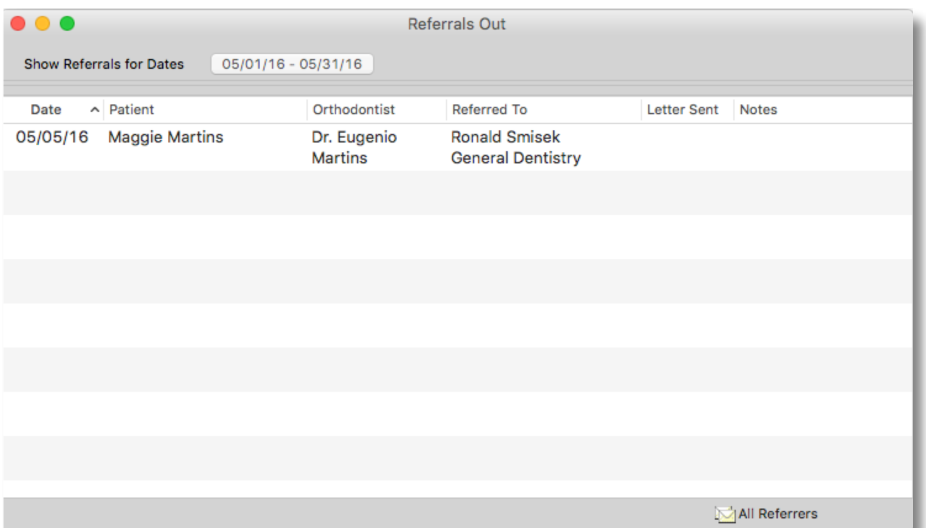
Date	Patient	Orthodontist	Referred By	Thanked	Notes
05/03/16	Maggie Martins	Dr. Eugenio Martins	ABC TV Advertisement NonMedical		add
05/04/16	Gary Nicholson	Dr. Eugenio Martins	Ronald Smisek General Dentistry		
05/04/16	Heather Graham	Dr. Eugenio Martins	Tom Anderson General Dentistry		
05/04/16	Ethan Wilson	Dr. Eugenio Martins	Tom Anderson General Dentistry		
05/04/16	Sally Breck	Dr. Eugenio Martins	Ronald Smisek General Dentistry		
05/04/16	Kim Watson	Dr. Eugenio Martins	Ronald Smisek General Dentistry		
05/04/16	Kelly Reynolds	Dr. Eugenio Martins	Ronald Smisek General Dentistry		
05/04/16	John Sounder	Dr. Eugenio Martins	Tom Anderson General Dentistry		

All Referrers

Features:

•Sortable columns

•Hot clickable to Re-ferrer Information



Referrals Out

Show Referrals for Dates 05/01/16 - 05/31/16

Date	Patient	Orthodontist	Referred To	Letter Sent	Notes
05/05/16	Maggie Martins	Dr. Eugenio Martins	Ronald Smisek General Dentistry		

All Referrers

Figure 21-19: *Referrals-In and Referrals-Out*

Treatment Notes

Shows all treatment notes created for a specific date range including chart ID, patient name, date, and all treatment note fields.

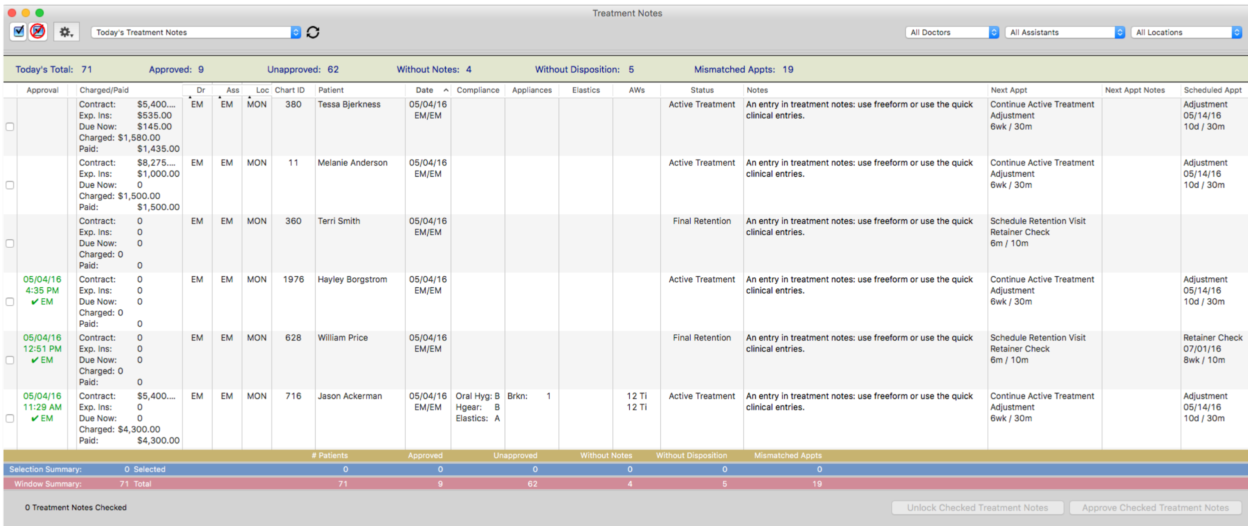


Figure 21-21: *Treatment Notes*

Features:

- Hot clickable, simply double click to jump to the patient's Treatment Notes
- Contextual menus, right click on the patient's name and choose where you'd like go
- Group selections, click & drag to select a group or command click to select various patients
- Sortable columns, click the column header to sort
- Multiple ways to filter and view the list
- Filter by doctor, assistant, or location
- Overview bar at the top of the window displays today's notes totals
- Summary bars at the bottom of the window display window and selection totals
- Treatment notes lock at rollover.

21B Introduction to the Report Menu
The Report Menu is divided into six areas.

Practice Monitor
Appointments
Accounts
Financials
Demographics
Review

Each division is designated with a light bar between the areas. You've already had the opportunity to use most of the reports. In the pages that follow, a brief description of each report accompanies a figure.

Reports Menu

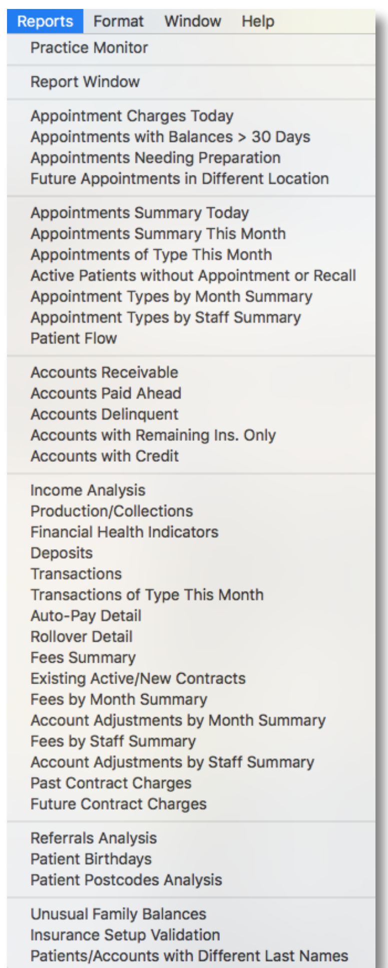


Figure 21-21: *Reports Menu*

Remember, reports display specific snapshot information. Data cannot be altered to allow for more information in a report.

Practice Monitor

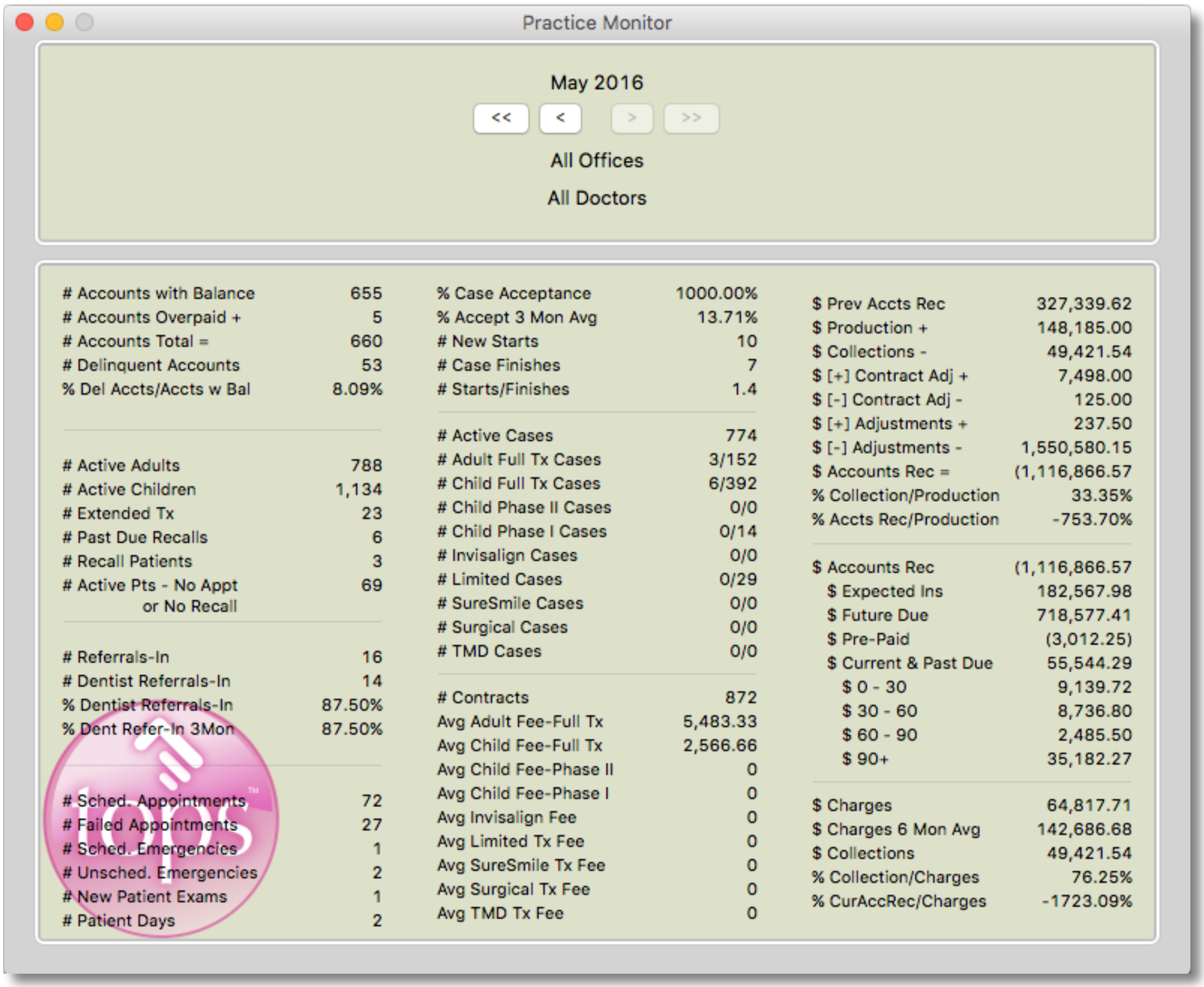


Figure 21-22: *Practice Monitor*

Report Window

Click on the report window to display reports and their categories. You can select any report in the drop-down list without closing and selecting again. You must click Run Report for the report to generate.

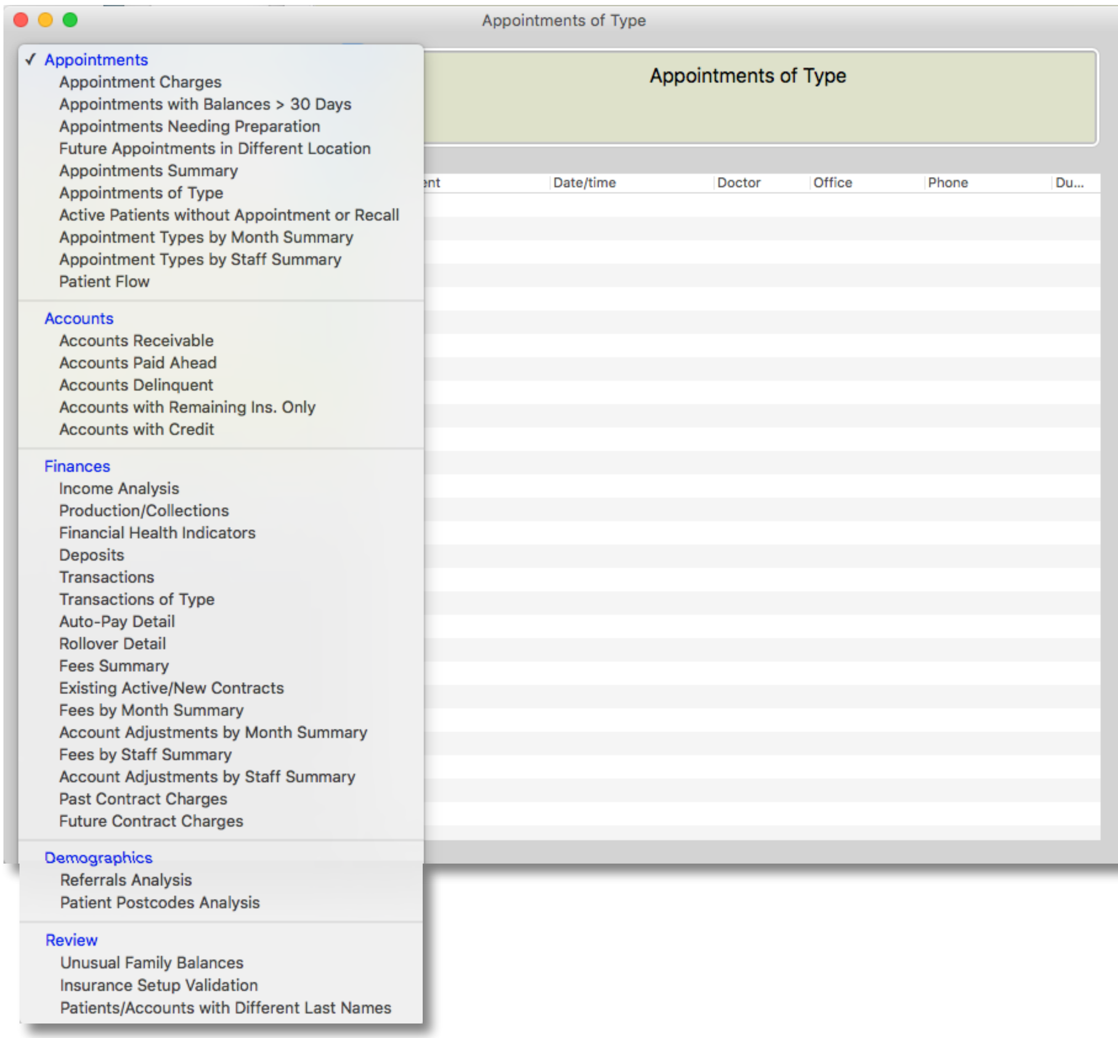


Figure 21-22: *Report Window*

Appointment Analysis

Appointment Charges Today

Allows for planning to charge patients for specific procedures not associated with a contract or contract fees. Displays patients that have a procedure scheduled with a corresponding charge for today.

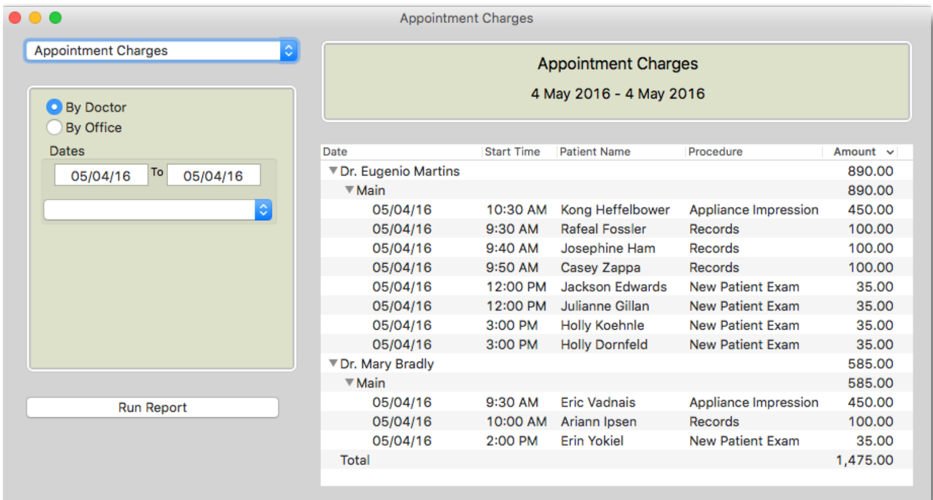


Figure 21-23: *Appointment Charges*

Features:

- Sortable columns
- Hot clickable to the appointment book
- Double-click on appointment and add to grid notes if desired
- Can show future charges that are on the appointment book
- Pulls information from Calendar–Clinical Procedures–Expected Charge

Suggested Uses:

- Front desk knows to charge the displayed amount to the patient following their appointment
- Can be compared with the Financial Day Sheet at the end of the day to verify all charges posted as expected

Appointments With Balances > 30 Days

Lists all appointments for a specified date range that has an account due now greater than $0.

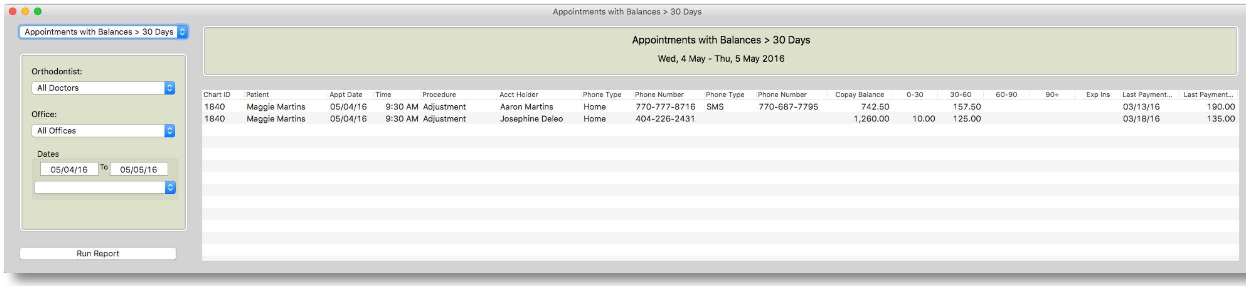


Figure 21-24: *Appointments With Balances > 30 Days*

Features:

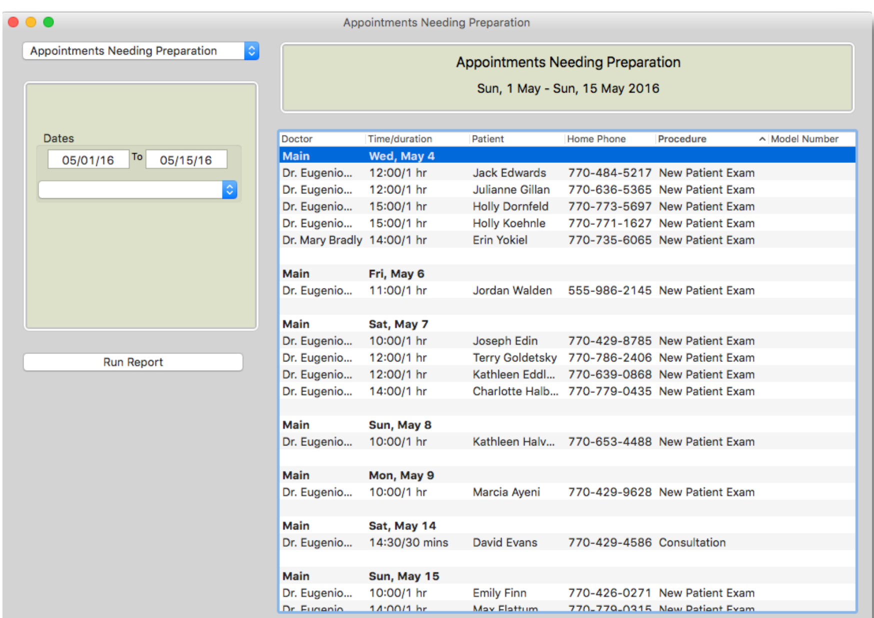
- Hot clickable to appointment book
- Sortable columns

Suggested Uses:

- Helps to identify those patients being seen that need financial attention

Appointments Needing Prep

Lists all appointments for a specified date range with "Needs Prep" checked in the Appointment Confirmation window.



Features:

- Hot clickable to patient information window

Figure 21-25: *Prep List*

Future Appointments in Different Location

Lists all appointments for a specified date range where the appointment's office location is different from the office location assigned to the patient.

Features:
- Hot clickable to appointment book
- Sortable columns

Figure 21-26: *Future Appointments in Different Locations*

Suggested Uses:
- Helpful in pulling models, appliances, and charts for transport to another office location
- Displays the doctor assigned to the scheduled patient

Appointment Summary Today
Appointment Summary for Month

Summary of scheduled clinical procedures for today or a given time period.

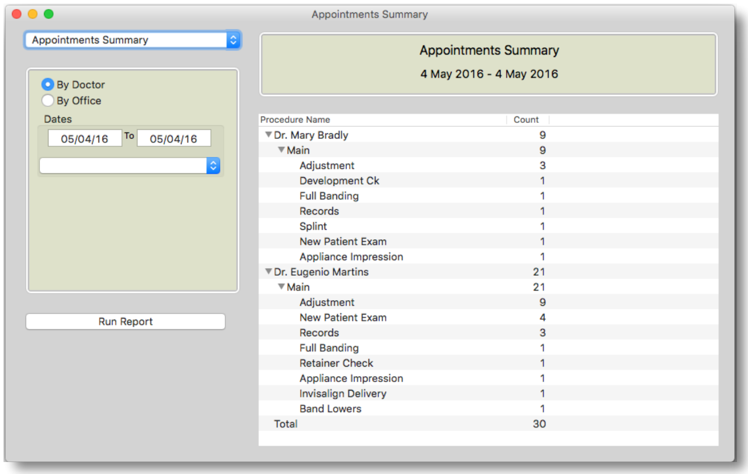
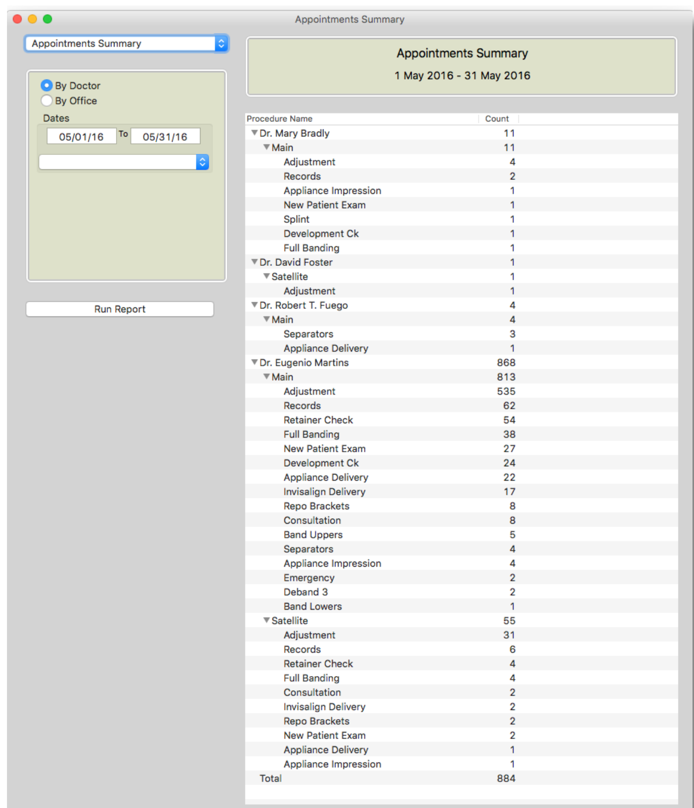


Figure 21-27: *Appointment Summary Today/Month*

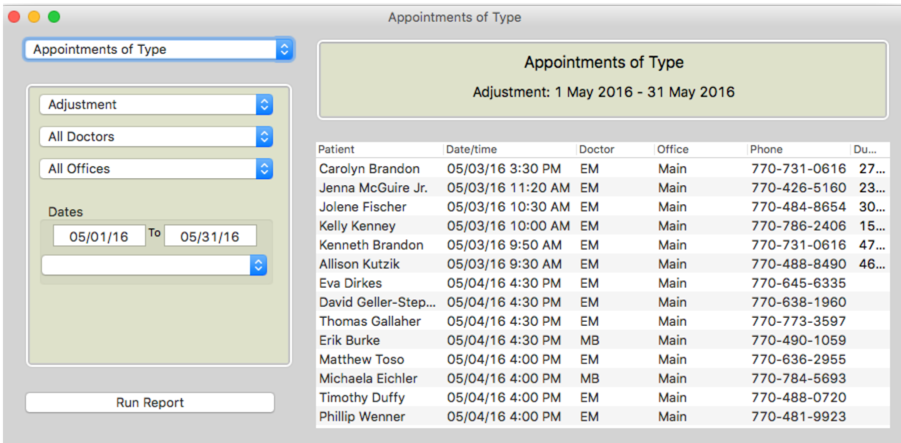


Features:
- Sortable by Doctor or office

Suggested Uses:
- View the total number of procedure types scheduled for a given time period
- Allows statistical evidence for making changes to scheduler
- Determine number of New Patient Exams for a given period

Appointments of Procedure Type This Month

Displays patients that have an appointment scheduled this month for the procedure type selected. Displays appointment dates and times, along with phone numbers.



Features:

- Sortable columns.
- Hot clickable to Patient Information window.

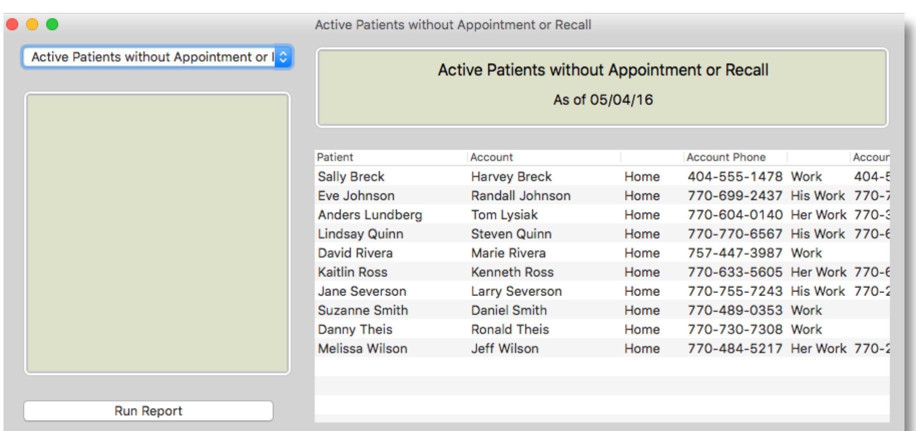
Figure 21-28: *Appointments of Type*

Suggested Uses:

- Confirm crucial appointments.
- Letter verification. Sort by consultations, create Letter list and see if letter have been sent.

Active Patients Without Appointment or Recall

Any Active patient that does not have a future appointment or recall.



Features:

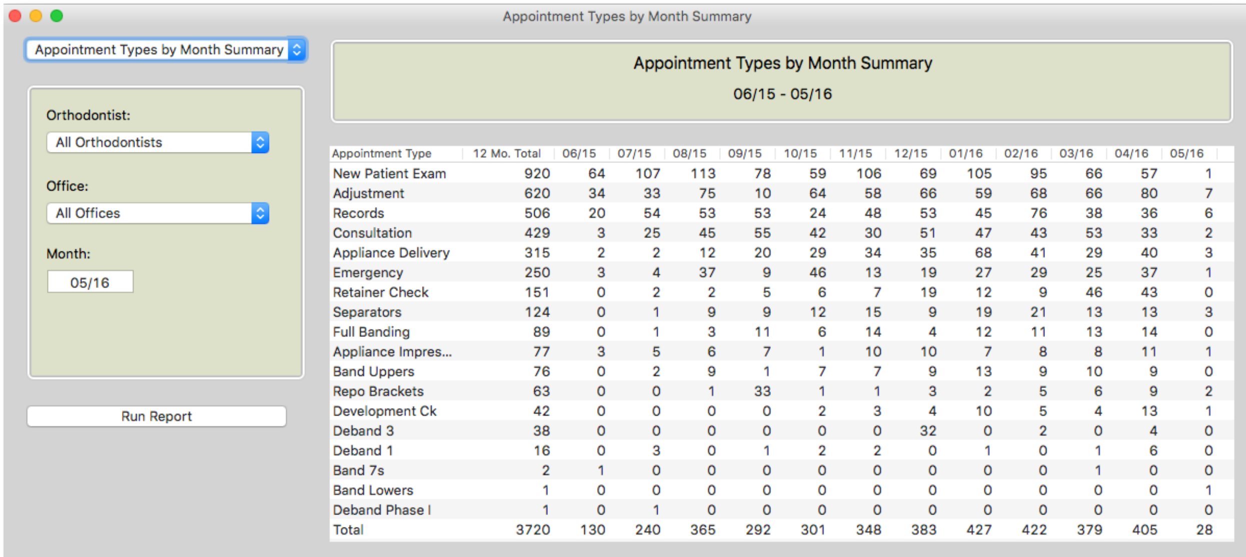
- Sortable columns
- Hot clickable to Patient Information window

Figure 21-29: *Active Patients Without Appointment or Recall*

Suggested Uses:

- Helpful in tracking patients that are considered “lost” and allows you to contact account holders to aid in scheduling an appointment

Appointment Types by Month Summary
Lists all appointment types for a 12 month period. Starts 12 months prior to the month specified.

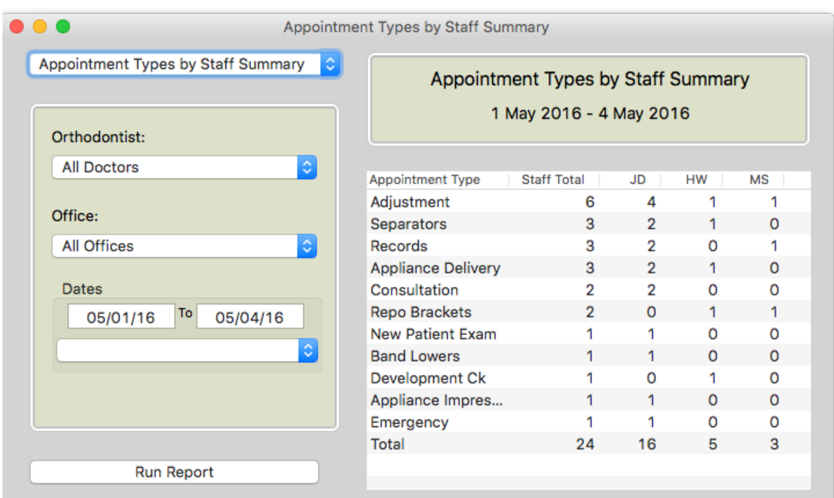


Appointment Type	12 Mo. Total	06/15	07/15	08/15	09/15	10/15	11/15	12/15	01/16	02/16	03/16	04/16	05/16
New Patient Exam	920	64	107	113	78	59	106	69	105	95	66	57	1
Adjustment	620	34	33	75	10	64	58	66	59	68	66	80	7
Records	506	20	54	53	53	24	48	53	45	76	38	36	6
Consultation	429	3	25	45	55	42	30	51	47	43	53	33	2
Appliance Delivery	315	2	2	12	20	29	34	35	68	41	29	40	3
Emergency	250	3	4	37	9	46	13	19	27	29	25	37	1
Retainer Check	151	0	2	2	5	6	7	19	12	9	46	43	0
Separators	124	0	1	9	9	12	15	9	19	21	13	13	3
Full Banding	89	0	1	3	11	6	14	4	12	11	13	14	0
Appliance Impres...	77	3	5	6	7	1	10	10	7	8	8	11	1
Band Uppers	76	0	2	9	1	7	7	9	13	9	10	9	0
Repo Brackets	63	0	0	1	33	1	1	3	2	5	6	9	2
Development Ck	42	0	0	0	0	2	3	4	10	5	4	13	1
Debond 3	38	0	0	0	0	0	0	32	0	2	0	4	0
Debond 1	16	0	3	0	1	2	2	0	1	0	1	6	0
Band 7s	2	1	0	0	0	0	0	0	0	0	1	0	0
Band Lowers	1	0	0	0	0	0	0	0	0	0	0	0	1
Debond Phase I	1	0	1	0	0	0	0	0	0	0	0	0	0
Total	3720	130	240	365	292	301	348	383	427	422	379	405	28

Figure 21-30: *Appointment Types by Month Summary*

Features:
- Sortable columns
- Filterable by doctor or office

Appointment Types by Staff Summary
List all appointment types and the clinical staff member listed in the treatment notes.



Appointment Type	Staff Total	JD	HW	MS
Adjustment	6	4	1	1
Separators	3	2	1	0
Records	3	2	0	1
Appliance Delivery	3	2	1	0
Consultation	2	2	0	0
Repo Brackets	2	0	1	1
New Patient Exam	1	1	0	0
Band Lowers	1	1	0	0
Development Ck	1	0	1	0
Appliance Impres...	1	1	0	0
Emergency	1	1	0	0
Total	24	16	5	3

Features:
- Sortable columns
- Filterable by doctor or office

Figure 21-31: *Appointment Types by Staff Summary*

Patient Flow

Lists the time details of all appointments completed in a given date range.

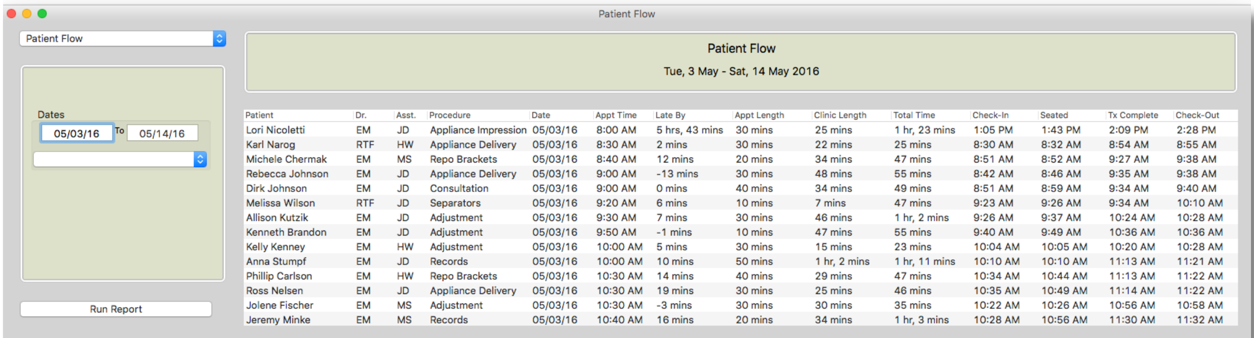


Figure 21-32: *Patient Flow*

Features:

- Sortable columns

Suggested Uses:

- Helpful in analyzing on-time performance in the practice

Accounts Receivable Analysis

Accounts Receivable

Accounts Receivable **as of today**.

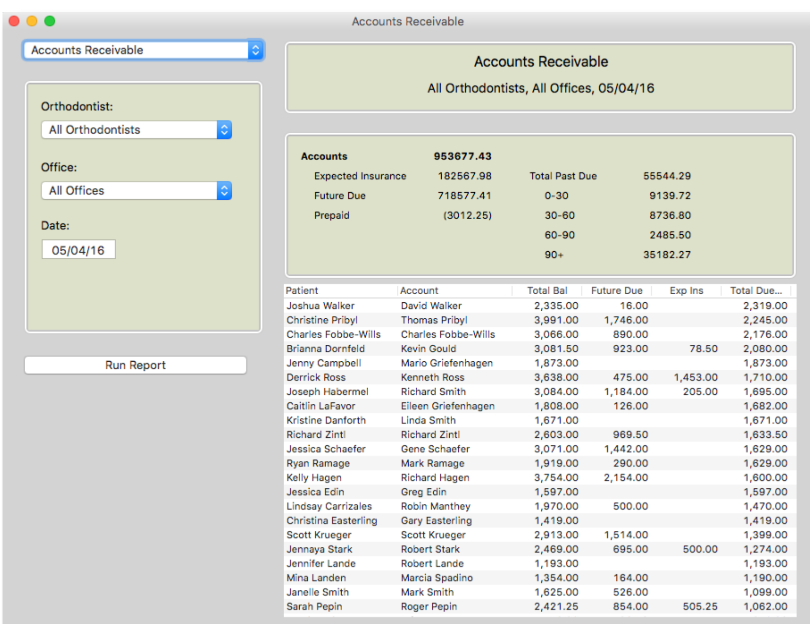


Figure 21-33: *Accounts Receivable*

Features:

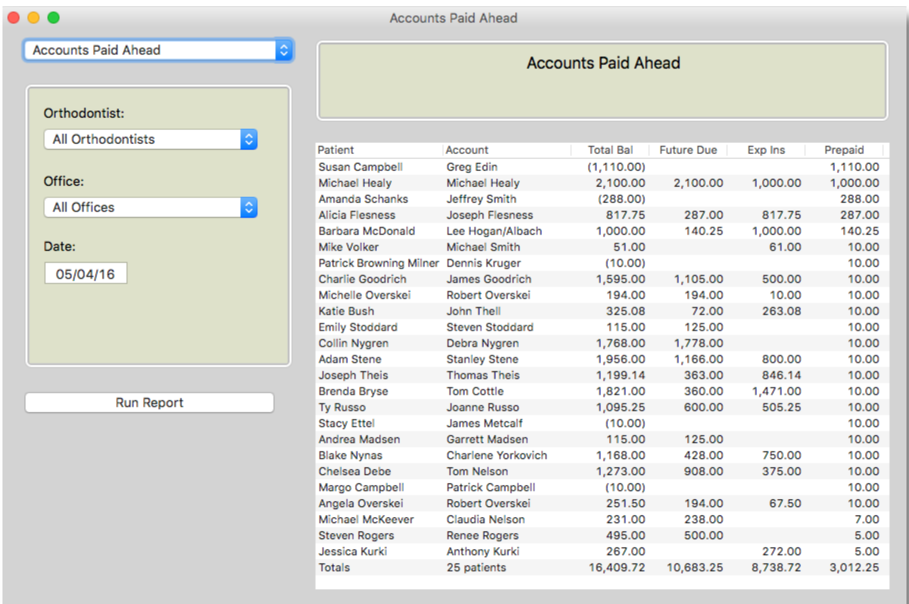
- Sortable columns
- Hot clickable to Patient Information window
- Totals for any date in the past can be viewed

Suggested Uses:

- Any information about your receivables. Any inconsistencies should send you to the Financial Day Sheet. (e.g., voided transactions)

Accounts Paid Ahead

This report shows any patient with a Due Now that is a credit. It also displays patients who have paid a copayment ahead of the contract schedule but still show an amount for Total Balance. This report is a subset of the Accounts Receivable report.



Patient	Account	Total Bal	Future Due	Exp Ins	Prepaid
Susan Campbell	Greg Edin	(1,110.00)			1,110.00
Michael Healy	Michael Healy	2,100.00	2,100.00	1,000.00	1,000.00
Amanda Schanks	Jeffrey Smith	(288.00)			288.00
Alicia Flesness	Joseph Flesness	817.75	287.00	817.75	287.00
Barbara McDonald	Lee Hogan/Albach	1,000.00	140.25	1,000.00	140.25
Mike Volker	Michael Smith	51.00		61.00	10.00
Patrick Browning Milner	Dennis Kruger	(10.00)			10.00
Charlie Goodrich	James Goodrich	1,595.00	1,105.00	500.00	10.00
Michelle Overskei	Robert Overskei	194.00	194.00	10.00	10.00
Katie Bush	John Thell	325.08	72.00	263.08	10.00
Emily Stoddard	Steven Stoddard	115.00	125.00		10.00
Collin Nygren	Debra Nygren	1,768.00	1,778.00		10.00
Adam Stene	Stanley Stene	1,956.00	1,166.00	800.00	10.00
Joseph Theis	Thomas Theis	1,199.14	363.00	846.14	10.00
Brenda Bryse	Tom Cottle	1,821.00	360.00	1,471.00	10.00
Ty Russo	Joanne Russo	1,095.25	600.00	505.25	10.00
Stacy Ettel	James Metcalf	(10.00)			10.00
Andrea Madsen	Garrett Madsen	115.00	125.00		10.00
Blake Nynas	Charlene Yorkovich	1,168.00	428.00	750.00	10.00
Chelsea Debe	Tom Nelson	1,273.00	908.00	375.00	10.00
Margo Campbell	Patrick Campbell	(10.00)			10.00
Angela Overskei	Robert Overskei	251.50	194.00	67.50	10.00
Michael McKeever	Claudia Nelson	231.00	238.00		7.00
Steven Rogers	Renee Rogers	495.00	500.00		5.00
Jessica Kurki	Anthony Kurki	267.00		272.00	5.00
Totals	25 patients	16,409.72	10,683.25	8,738.72	3,012.25

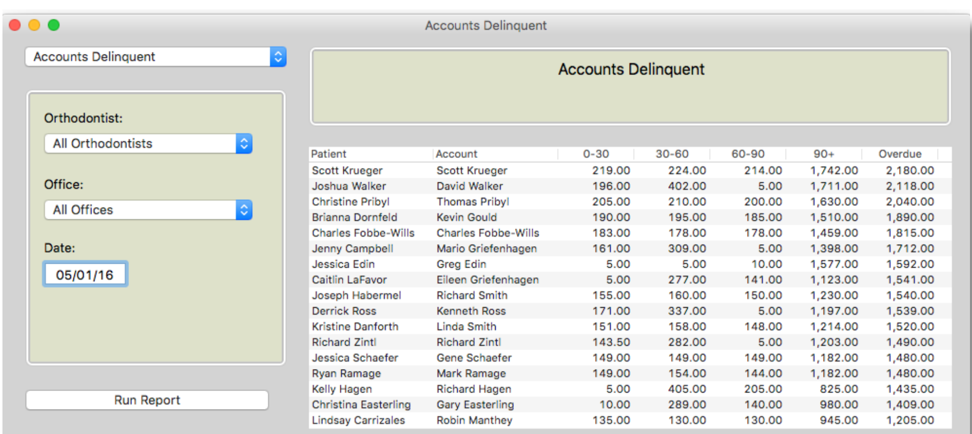
Features:
•Sortable columns

Suggested Uses:
• View patients whose prepaid amount matches their future due, and deactivate the contracts. **If there is no Expected Insurance due.*

Figure 21-34: *Accounts Paid Ahead*

Accounts Delinquent

Displays a list of patients with charges more than 30 days old. This report is a subset of the Accounts Receivable report.



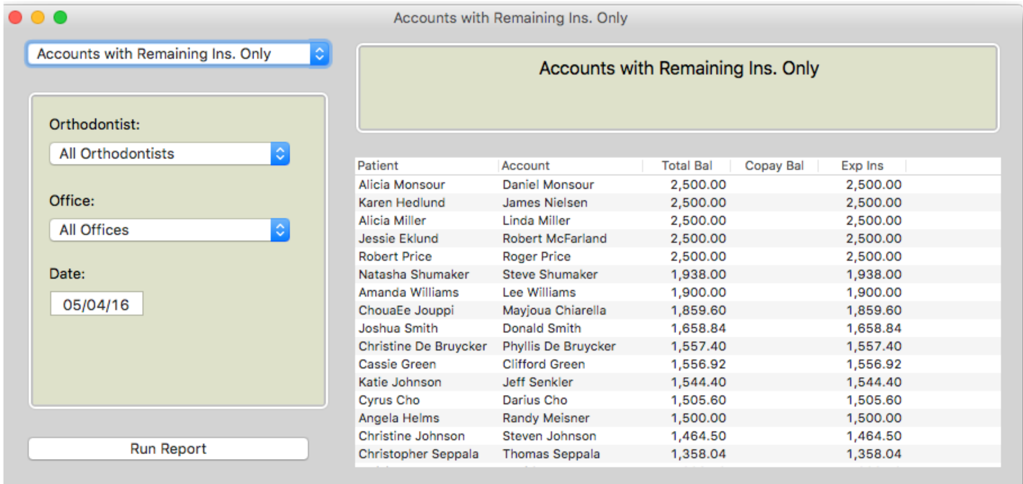
Patient	Account	0-30	30-60	60-90	90+	Overdue
Scott Krueger	Scott Krueger	219.00	224.00	214.00	1,742.00	2,180.00
Joshua Walker	David Walker	196.00	402.00	5.00	1,711.00	2,118.00
Christine Pribyl	Thomas Pribyl	205.00	210.00	200.00	1,630.00	2,040.00
Brianna Dornfeld	Kevin Gould	190.00	195.00	185.00	1,510.00	1,890.00
Charles Fobbe-Wills	Charles Fobbe-Wills	183.00	178.00	178.00	1,459.00	1,815.00
Jenny Campbell	Mario Griefenhagen	161.00	309.00	5.00	1,398.00	1,712.00
Jessica Edin	Greg Edin	5.00	5.00	10.00	1,577.00	1,592.00
Caitlin LaFavor	Eileen Griefenhagen	5.00	277.00	141.00	1,123.00	1,541.00
Joseph Habermel	Richard Smith	155.00	160.00	150.00	1,230.00	1,540.00
Derrick Ross	Kenneth Ross	171.00	337.00	5.00	1,197.00	1,539.00
Kristine Danforth	Linda Smith	151.00	158.00	148.00	1,214.00	1,520.00
Richard Zintl	Richard Zintl	143.50	282.00	5.00	1,203.00	1,490.00
Jessica Schaefer	Gene Schaefer	149.00	149.00	149.00	1,182.00	1,480.00
Ryan Ramage	Mark Ramage	149.00	154.00	144.00	1,182.00	1,480.00
Kelly Hagen	Richard Hagen	5.00	405.00	205.00	825.00	1,435.00
Christina Easterling	Gary Easterling	10.00	289.00	140.00	980.00	1,409.00
Lindsay Carrizales	Robin Manthey	135.00	130.00	130.00	945.00	1,205.00

Features:
•Sortable columns
•Hot clickable to Patient Information

Figure 21-35: *Accounts Delinquent*

Accounts with Remaining Insurance Only

Patients that the copays have been paid and the only outstanding money owned is from insurance. This report is a subset of the Accounts Receivable report.



Patient	Account	Total Bal	Copay Bal	Exp Ins
Alicia Monsour	Daniel Monsour	2,500.00		2,500.00
Karen Hedlund	James Nielsen	2,500.00		2,500.00
Alicia Miller	Linda Miller	2,500.00		2,500.00
Jessie Eklund	Robert McFarland	2,500.00		2,500.00
Robert Price	Roger Price	2,500.00		2,500.00
Natasha Shumaker	Steve Shumaker	1,938.00		1,938.00
Amanda Williams	Lee Williams	1,900.00		1,900.00
ChouaEe Jouppi	Mayjoua Chiarella	1,859.60		1,859.60
Joshua Smith	Donald Smith	1,658.84		1,658.84
Christine De Bruycker	Phyllis De Bruycker	1,557.40		1,557.40
Cassie Green	Clifford Green	1,556.92		1,556.92
Katie Johnson	Jeff Senkler	1,544.40		1,544.40
Cyrus Cho	Darius Cho	1,505.60		1,505.60
Angela Helms	Randy Meisner	1,500.00		1,500.00
Christine Johnson	Steven Johnson	1,464.50		1,464.50
Christopher Seppala	Thomas Seppala	1,358.04		1,358.04

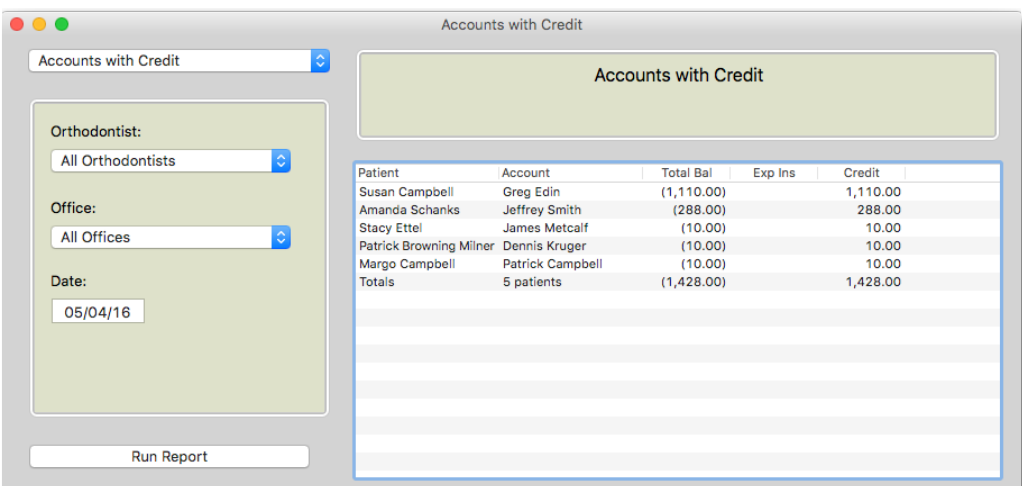
Features:
- Sortable columns

Figure 21-36: *Accounts with Remaining Insurance Only*

Suggested Uses:
- Helpful to identify those who have lost insurance but have not notified the practice; the balance should be moved into account holder responsibility.

Accounts with Credit

The patient's total balance is a credit. This report is a subset of the Accounts Receivable report.



Patient	Account	Total Bal	Exp Ins	Credit
Susan Campbell	Greg Edin	(1,110.00)		1,110.00
Amanda Schanks	Jeffrey Smith	(288.00)		288.00
Stacy Ettel	James Metcalf	(10.00)		10.00
Patrick Browning Milner	Dennis Kruger	(10.00)		10.00
Margo Campbell	Patrick Campbell	(10.00)		10.00
Totals	5 patients	(1,428.00)		1,428.00

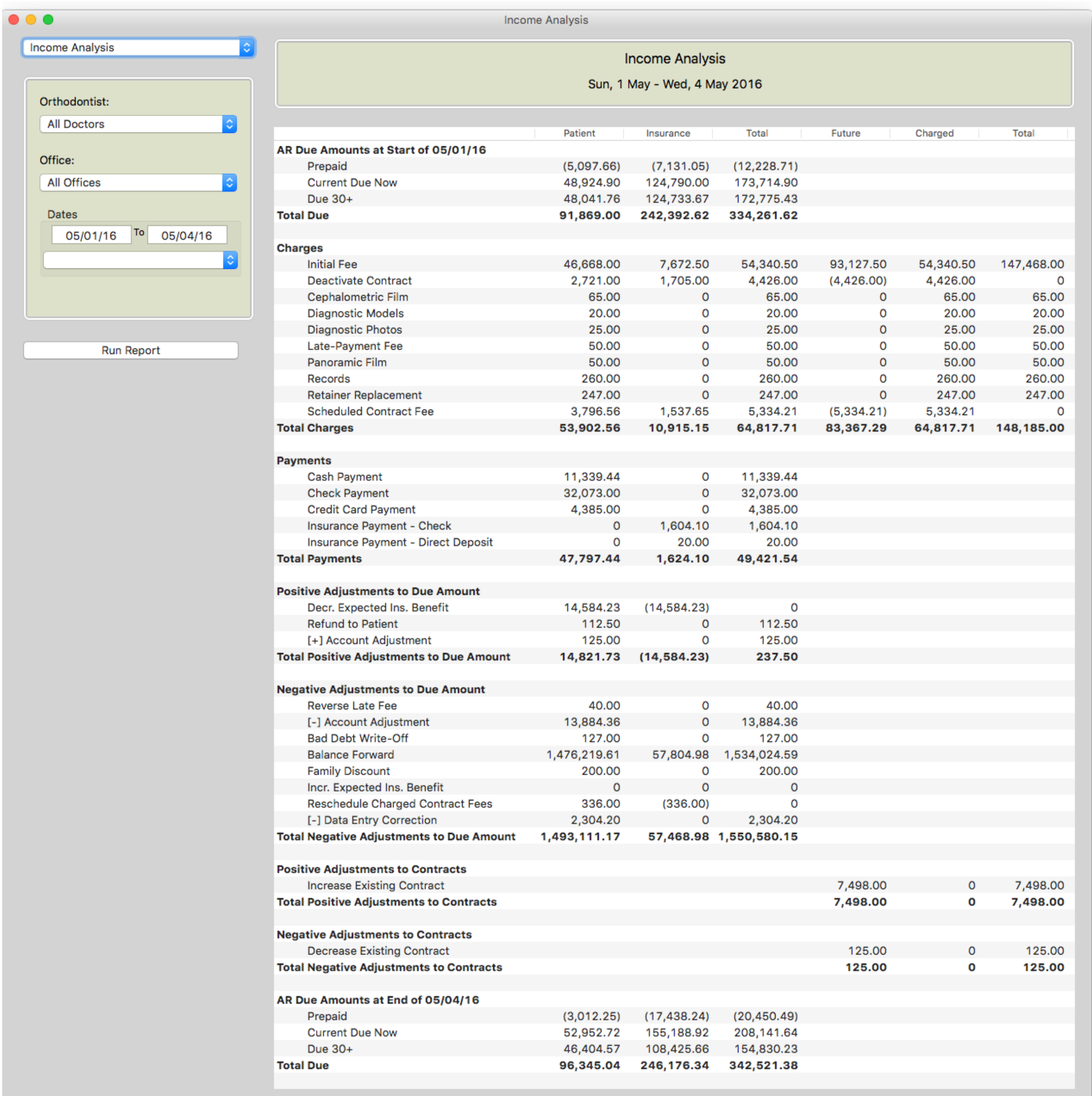
Features:
- Sortable columns

Suggested Uses:
- Identify payments made for services that were never charged

Figure 21-37: *Accounts with Credit*

Financial Reports

Income Analysis
Displays accounts receivable at specified start and end dates.



Income Analysis

Sun, 1 May - Wed, 4 May 2016

	Patient	Insurance	Total	Future	Charged	Total
AR Due Amounts at Start of 05/01/16						
Prepaid	(5,097.66)	(7,131.05)	(12,228.71)			
Current Due Now	48,924.90	124,790.00	173,714.90			
Due 30+	48,041.76	124,733.67	172,775.43			
Total Due	**91,869.00**	**242,392.62**	**334,261.62**			
Charges						
Initial Fee	46,668.00	7,672.50	54,340.50	93,127.50	54,340.50	147,468.00
Deactivate Contract	2,721.00	1,705.00	4,426.00	(4,426.00)	4,426.00	0
Cephalometric Film	65.00	0	65.00	0	65.00	65.00
Diagnostic Models	20.00	0	20.00	0	20.00	20.00
Diagnostic Photos	25.00	0	25.00	0	25.00	25.00
Late-Payment Fee	50.00	0	50.00	0	50.00	50.00
Panoramic Film	50.00	0	50.00	0	50.00	50.00
Records	260.00	0	260.00	0	260.00	260.00
Retainer Replacement	247.00	0	247.00	0	247.00	247.00
Scheduled Contract Fee	3,796.56	1,537.65	5,334.21	(5,334.21)	5,334.21	0
Total Charges	**53,902.56**	**10,915.15**	**64,817.71**	**83,367.29**	**64,817.71**	**148,185.00**
Payments						
Cash Payment	11,339.44	0	11,339.44			
Check Payment	32,073.00	0	32,073.00			
Credit Card Payment	4,385.00	0	4,385.00			
Insurance Payment - Check	0	1,604.10	1,604.10			
Insurance Payment - Direct Deposit	0	20.00	20.00			
Total Payments	**47,797.44**	**1,624.10**	**49,421.54**			
Positive Adjustments to Due Amount						
Decr. Expected Ins. Benefit	14,584.23	(14,584.23)	0			
Refund to Patient	112.50	0	112.50			
[+] Account Adjustment	125.00	0	125.00			
Total Positive Adjustments to Due Amount	**14,821.73**	**(14,584.23)**	**237.50**			
Negative Adjustments to Due Amount						
Reverse Late Fee	40.00	0	40.00			
[-] Account Adjustment	13,884.36	0	13,884.36			
Bad Debt Write-Off	127.00	0	127.00			
Balance Forward	1,476,219.61	57,804.98	1,534,024.59			
Family Discount	200.00	0	200.00			
Incr. Expected Ins. Benefit	0	0	0			
Reschedule Charged Contract Fees	336.00	(336.00)	0			
[-] Data Entry Correction	2,304.20	0	2,304.20			
Total Negative Adjustments to Due Amount	**1,493,111.17**	**57,468.98**	**1,550,580.15**			
Positive Adjustments to Contracts						
Increase Existing Contract				7,498.00	0	7,498.00
Total Positive Adjustments to Contracts				**7,498.00**	**0**	**7,498.00**
Negative Adjustments to Contracts						
Decrease Existing Contract				125.00	0	125.00
Total Negative Adjustments to Contracts				**125.00**	**0**	**125.00**
AR Due Amounts at End of 05/04/16						
Prepaid	(3,012.25)	(17,438.24)	(20,450.49)			
Current Due Now	52,952.72	155,188.92	208,141.64			
Due 30+	46,404.57	108,425.66	154,830.23			
Total Due	**96,345.04**	**246,176.34**	**342,521.38**			

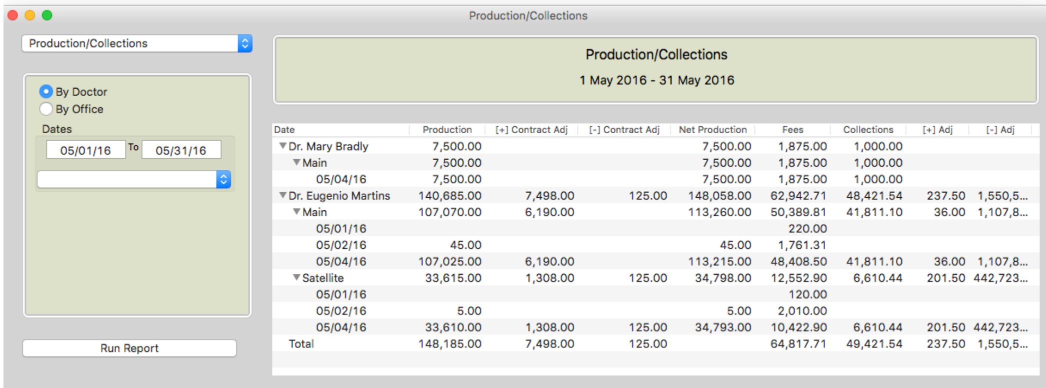
Figure 21-38: *Income Analysis*

Features:
- View starting and ending balances.

Suggested Uses:
- Helpful in viewing your accounts receivable within a specific time period.

Production/Collections

All production and collections for a given time period



Date	Production	[+] Contract Adj	[-] Contract Adj	Net Production	Fees	Collections	[+] Adj	[-] Adj
▼Dr. Mary Bradly	7,500.00			7,500.00	1,875.00	1,000.00		
▼Main	7,500.00			7,500.00	1,875.00	1,000.00		
05/04/16	7,500.00			7,500.00	1,875.00	1,000.00		
▼Dr. Eugenio Martins	140,685.00	7,498.00	125.00	148,058.00	62,942.71	48,421.54	237.50	1,550,5...
▼Main	107,070.00	6,190.00		113,260.00	50,389.81	41,811.10	36.00	1,107,8...
05/01/16					220.00			
05/02/16	45.00			45.00	1,761.31			
05/04/16	107,025.00	6,190.00		113,215.00	48,408.50	41,811.10	36.00	1,107,8...
▼Satellite	33,615.00	1,308.00	125.00	34,798.00	12,552.90	6,610.44	201.50	442,723...
05/01/16					120.00			
05/02/16	5.00			5.00	2,010.00			
05/04/16	33,610.00	1,308.00	125.00	34,793.00	10,422.90	6,610.44	201.50	442,723...
Total	148,185.00	7,498.00	125.00		64,817.71	49,421.54	237.50	1,550,5...

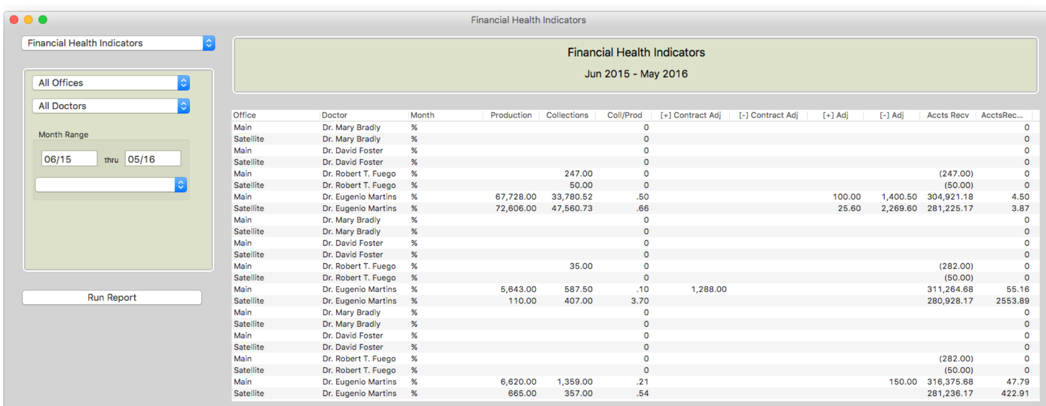
Features:
- Sortable columns
- Filter by doctor or office

Figure 21-39: *Production and Collections*

Suggested Uses:
- Shows how much money the office is bringing in, compared to how much work the office is actually doing

Financial Health Indicator

Shows production, collections, the ratio of collections per production, adjustments, accounts receivable totals, and the ratio of accounts receivable per production by monthly totals for a specified time period.



Office	Doctor	Month	Production	Collections	Coll/Prod	[+] Contract Adj	[-] Contract Adj	[+] Adj	[-] Adj	Accts Recv	AcctsRec...
Main	Dr. Mary Bradly	%			0						0
Satellite	Dr. Mary Bradly	%			0						0
Main	Dr. David Foster	%			0						0
Satellite	Dr. David Foster	%			0						0
Main	Dr. Robert T. Fuego	%		247.00	0					(247.00)	0
Satellite	Dr. Robert T. Fuego	%		50.00	0					(50.00)	0
Main	Dr. Eugenio Martins	%	67,728.00	33,780.52	.50			100.00	1,400.50	304,921.18	4.50
Satellite	Dr. Eugenio Martins	%	72,606.00	47,560.73	.66			25.60	2,269.60	281,225.17	3.87
Main	Dr. Mary Bradly	%			0						0
Satellite	Dr. Mary Bradly	%			0						0
Main	Dr. David Foster	%			0						0
Satellite	Dr. David Foster	%			0						0
Main	Dr. Robert T. Fuego	%		35.00	0					(282.00)	0
Satellite	Dr. Robert T. Fuego	%			0					(50.00)	0
Main	Dr. Eugenio Martins	%	5,643.00	587.50	.10	1,288.00				311,264.68	55.16
Satellite	Dr. Eugenio Martins	%	110.00	407.00	3.70					280,928.17	2553.89
Main	Dr. Mary Bradly	%			0						0
Satellite	Dr. Mary Bradly	%			0						0
Main	Dr. David Foster	%			0						0
Satellite	Dr. David Foster	%			0						0
Main	Dr. Robert T. Fuego	%			0					(282.00)	0
Satellite	Dr. Robert T. Fuego	%			0					(50.00)	0
Main	Dr. Eugenio Martins	%	6,620.00	1,359.00	.21				150.00	316,375.68	47.79
Satellite	Dr. Eugenio Martins	%	665.00	357.00	.54					281,236.17	422.91

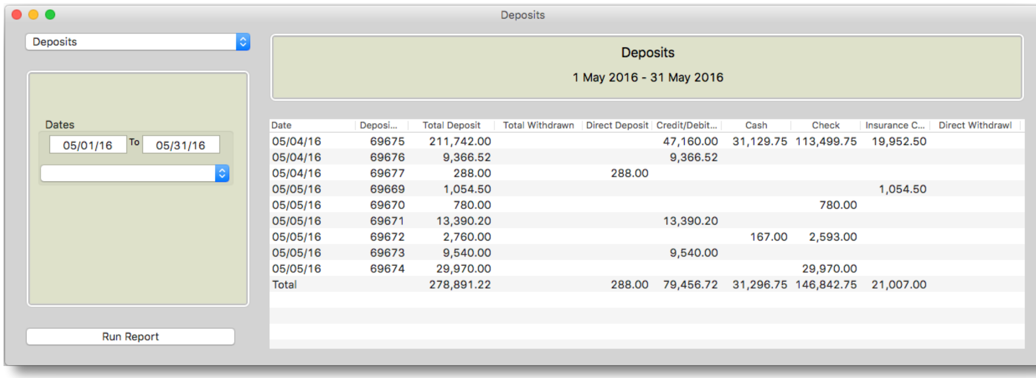
Features:
- Sortable columns
- Filter by doctor or office

Figure 21-40: *Financial Health*

Suggested Uses:
- Ratios are used by some consultants in measuring practice performance; the ideal ratio will be determined by you and your consultant

Deposits

This report shows deposits made on a specific date.



Date	Deposi...	Total Deposit	Total Withdrawn	Direct Deposit	Credit/Debit...	Cash	Check	Insurance C...	Direct Withdrawl
05/04/16	69675	211,742.00			47,160.00	31,129.75	113,499.75	19,952.50	
05/04/16	69676	9,366.52			9,366.52				
05/04/16	69677	288.00		288.00					
05/05/16	69669	1,054.50						1,054.50	
05/05/16	69670	780.00					780.00		
05/05/16	69671	13,390.20			13,390.20				
05/05/16	69672	2,760.00				167.00	2,593.00		
05/05/16	69673	9,540.00			9,540.00				
05/05/16	69674	29,970.00					29,970.00		
Total		278,891.22		288.00	79,456.72	31,296.75	146,842.75	21,007.00	

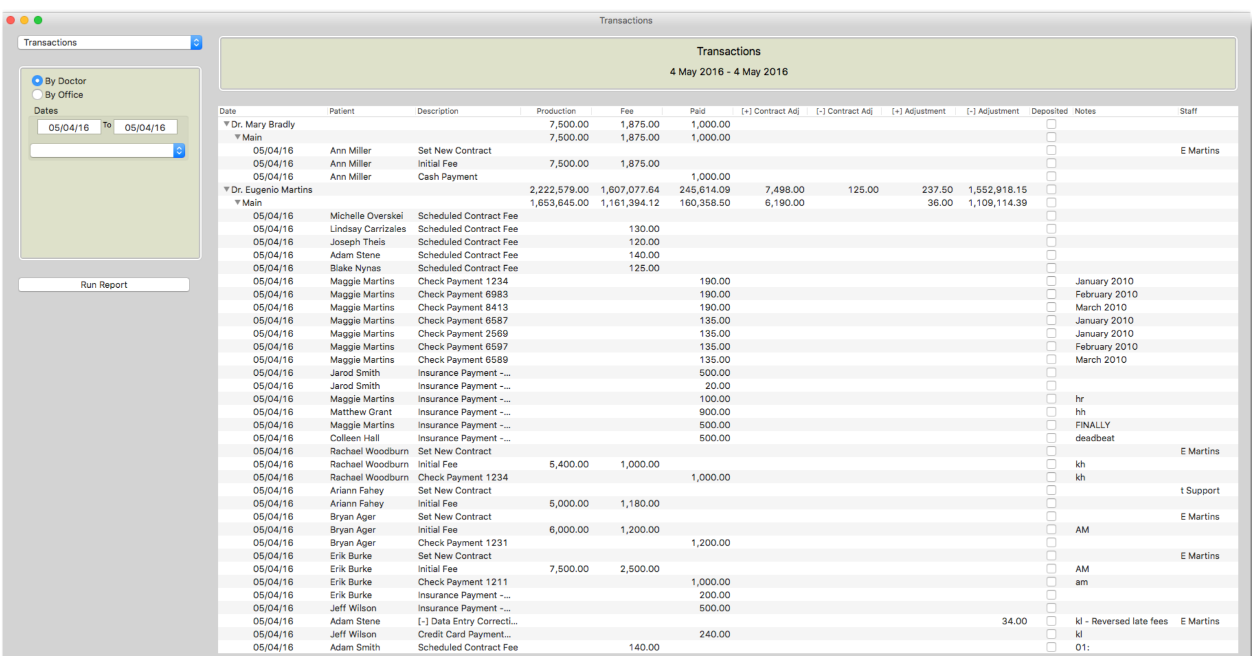
Features:
- Sortable columns
- Hot click-able to open specific deposit

Figure 21-41: *Deposits*

Suggested Uses:
- Reconciliation for a time period.

Transactions

This reports all transactions recorded for a specific time period.



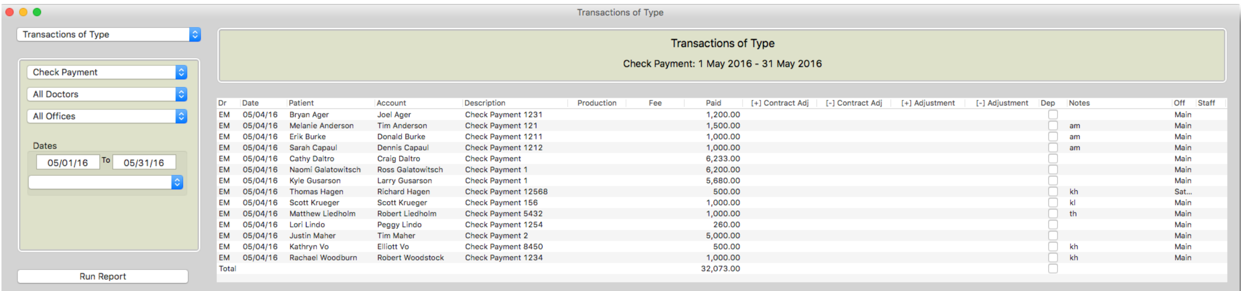
Date	Patient	Description	Production	Fee	Paid	[+] Contract Adj	[-] Contract Adj	[+] Adjustment	[-] Adjustment	Deposited	Notes	Staff
▼Dr. Mary Bradly			7,500.00	1,875.00	1,000.00							
▼Main			7,500.00	1,875.00	1,000.00							
05/04/16	Ann Miller	Set New Contract										E Martins
05/04/16	Ann Miller	Initial Fee	7,500.00	1,875.00								
05/04/16	Ann Miller	Cash Payment			1,000.00							
▼Dr. Eugenio Martins			2,222,579.00	1,607,077.64	245,614.09	7,498.00	125.00	237.50	1,552,918.15			
▼Main			1,653,645.00	1,161,394.12	160,358.50	6,190.00		36.00	1,109,114.39			
05/04/16	Michelle Overskei	Scheduled Contract Fee										
05/04/16	Lindsay Carrizales	Scheduled Contract Fee		130.00								
05/04/16	Joseph Theis	Scheduled Contract Fee		120.00								
05/04/16	Adam Stene	Scheduled Contract Fee		140.00								
05/04/16	Blake Nynas	Scheduled Contract Fee		125.00								
05/04/16	Maggie Martins	Check Payment 1234			190.00						January 2010	
05/04/16	Maggie Martins	Check Payment 6983			190.00						February 2010	
05/04/16	Maggie Martins	Check Payment 8413			190.00						March 2010	
05/04/16	Maggie Martins	Check Payment 6587			135.00						January 2010	
05/04/16	Maggie Martins	Check Payment 2569			135.00						January 2010	
05/04/16	Maggie Martins	Check Payment 6597			135.00						February 2010	
05/04/16	Maggie Martins	Check Payment 6589			135.00						March 2010	
05/04/16	Jarod Smith	Insurance Payment -...			500.00							
05/04/16	Jarod Smith	Insurance Payment -...			20.00							
05/04/16	Maggie Martins	Insurance Payment -...			100.00						hr	
05/04/16	Matthew Grant	Insurance Payment -...			900.00						hh	
05/04/16	Maggie Martins	Insurance Payment -...			500.00						FINALLY	
05/04/16	Colleen Hall	Insurance Payment -...			500.00						deadbeat	
05/04/16	Rachael Woodburn	Set New Contract										E Martins
05/04/16	Rachael Woodburn	Initial Fee	5,400.00	1,000.00							kh	
05/04/16	Rachael Woodburn	Check Payment 1234			1,000.00						kh	
05/04/16	Ariann Fahey	Set New Contract										t Support
05/04/16	Ariann Fahey	Initial Fee	5,000.00	1,180.00								
05/04/16	Bryan Ager	Set New Contract										E Martins
05/04/16	Bryan Ager	Initial Fee	6,000.00	1,200.00							AM	
05/04/16	Bryan Ager	Check Payment 1231			1,200.00							
05/04/16	Erik Burke	Set New Contract										E Martins
05/04/16	Erik Burke	Initial Fee	7,500.00	2,500.00							AM	
05/04/16	Erik Burke	Check Payment 1211			1,000.00						am	
05/04/16	Erik Burke	Insurance Payment -...			200.00							
05/04/16	Jeff Wilson	Insurance Payment -...			500.00							
05/04/16	Adam Stene	[-] Data Entry Correcti...							34.00		kl - Reversed late fees	E Martins
05/04/16	Jeff Wilson	Credit Card Payment...			240.00						kl	
05/04/16	Adam Smith	Scheduled Contract Fee		140.00							01:	

Figure 21-42: *Transactions*

Features:
- Filter by doctor and office

Transactions of Given Type

This is a subset of the Transactions Report, in which you can select a specific transaction for a specific time period.



Dr	Date	Patient	Account	Description	Production	Fee	Paid	[+] Contract Adj	[-] Contract Adj	[+] Adjustment	[-] Adjustment	Dep	Notes	Off	Staff
EM	05/04/16	Bryan Ager	Joel Ager	Check Payment 1231			1,200.00							Main	
EM	05/04/16	Melanie Anderson	Tim Anderson	Check Payment 121			1,500.00						am	Main	
EM	05/04/16	Erik Burke	Donald Burke	Check Payment 1211			1,000.00						am	Main	
EM	05/04/16	Sarah Capaul	Dennis Capaul	Check Payment 1212			1,000.00						am	Main	
EM	05/04/16	Cathy Daltro	Craig Daltro	Check Payment			6,233.00							Main	
EM	05/04/16	Naomi Galatowitsch	Ross Galatowitsch	Check Payment 1			6,200.00							Main	
EM	05/04/16	Kyle Gusarson	Larry Gusarson	Check Payment 1			5,680.00							Main	
EM	05/04/16	Thomas Hagen	Richard Hagen	Check Payment 12568			500.00						kh	Sat...	
EM	05/04/16	Scott Krueger	Scott Krueger	Check Payment 156			1,000.00						kl	Main	
EM	05/04/16	Matthew Liedholm	Robert Liedholm	Check Payment 5432			1,000.00						th	Main	
EM	05/04/16	Lori Lindo	Peggy Lindo	Check Payment 1254			260.00							Main	
EM	05/04/16	Justin Maher	Tim Maher	Check Payment 2			5,000.00							Main	
EM	05/04/16	Kathryn Vo	Elliott Vo	Check Payment 8450			500.00						kh	Main	
EM	05/04/16	Rachael Woodburn	Robert Woodstock	Check Payment 1234			1,000.00						kh	Main	
Total							32,073.00								

Figure 21-43: *Transactions of Type*

Features:

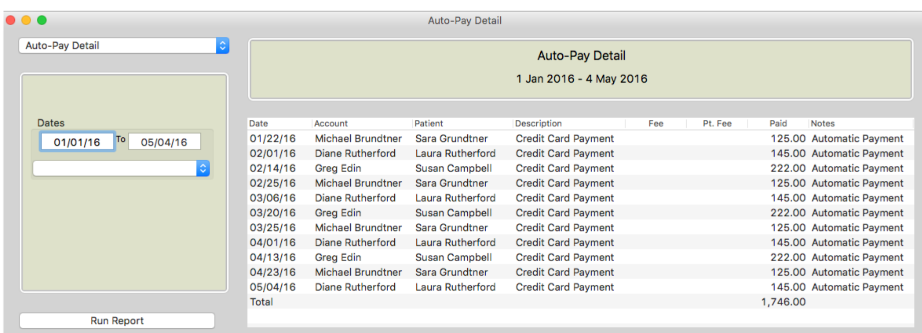
- Sortable columns
- Hot clickable to open Patient Information

Suggested Uses:

- Verify any transaction amounts such as, Bad Debt Write-off, Refunds to patient, etc.
- Create one report with transaction of Set New Contract, open second report with Initial fee and compare to make sure that contracts have been charged

Auto-Pay Detail

Displays all transactions posted as part of any Auto-Payment plan within a specific time.



Date	Account	Patient	Description	Fee	Pt. Fee	Paid	Notes
01/22/16	Michael Brundtner	Sara Grundtner	Credit Card Payment			125.00	Automatic Payment
02/01/16	Diane Rutherford	Laura Rutherford	Credit Card Payment			145.00	Automatic Payment
02/14/16	Greg Edin	Susan Campbell	Credit Card Payment			222.00	Automatic Payment
02/25/16	Michael Brundtner	Sara Grundtner	Credit Card Payment			125.00	Automatic Payment
03/06/16	Diane Rutherford	Laura Rutherford	Credit Card Payment			145.00	Automatic Payment
03/20/16	Greg Edin	Susan Campbell	Credit Card Payment			222.00	Automatic Payment
03/25/16	Michael Brundtner	Sara Grundtner	Credit Card Payment			125.00	Automatic Payment
04/01/16	Diane Rutherford	Laura Rutherford	Credit Card Payment			145.00	Automatic Payment
04/13/16	Greg Edin	Susan Campbell	Credit Card Payment			222.00	Automatic Payment
04/23/16	Michael Brundtner	Sara Grundtner	Credit Card Payment			125.00	Automatic Payment
05/04/16	Diane Rutherford	Laura Rutherford	Credit Card Payment			145.00	Automatic Payment
Total						1,746.00	

Features:

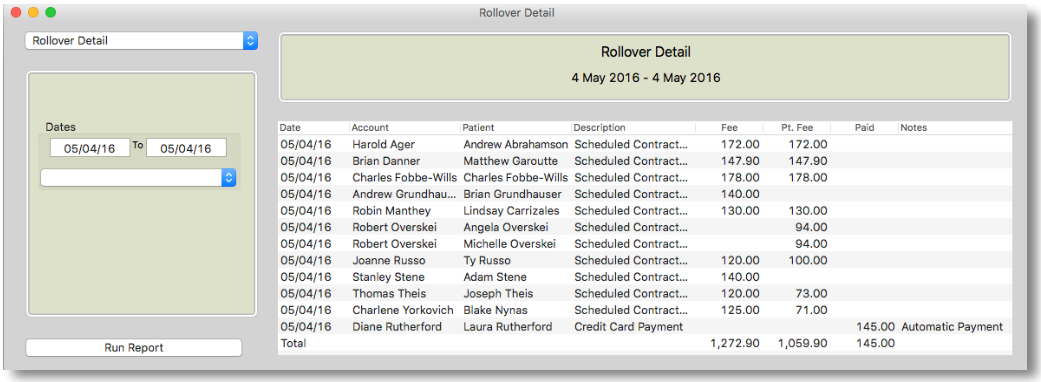
- Sortable columns
- Hot clickable to the Patient Information window

Figure 21-44: *Auto-Pay Transactions*

Suggested Uses:

- Helpful in comparing multiple types of statements from different vendors such as OrthoBanc, your private bank, and the credit card processor at one time

Rollover Detail
Lists details of every transaction posted to the system during rollover.

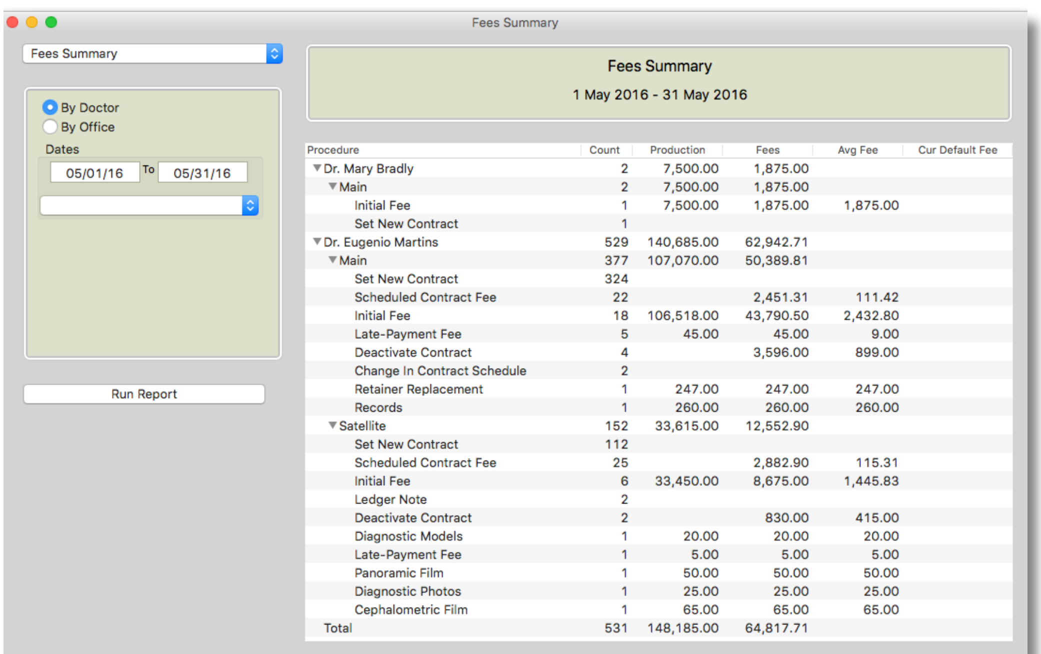


Date	Account	Patient	Description	Fee	Pt. Fee	Paid	Notes
05/04/16	Harold Ager	Andrew Abrahamson	Scheduled Contract...	172.00	172.00		
05/04/16	Brian Danner	Matthew Garoutte	Scheduled Contract...	147.90	147.90		
05/04/16	Charles Fobbe-Wills	Charles Fobbe-Wills	Scheduled Contract...	178.00	178.00		
05/04/16	Andrew Grundhau...	Brian Grundhauser	Scheduled Contract...	140.00			
05/04/16	Robin Manthey	Lindsay Carrizales	Scheduled Contract...	130.00	130.00		
05/04/16	Robert Overskei	Angela Overskei	Scheduled Contract...		94.00		
05/04/16	Robert Overskei	Michelle Overskei	Scheduled Contract...		94.00		
05/04/16	Joanne Russo	Ty Russo	Scheduled Contract...	120.00	100.00		
05/04/16	Stanley Stene	Adam Stene	Scheduled Contract...	140.00			
05/04/16	Thomas Theis	Joseph Theis	Scheduled Contract...	120.00	73.00		
05/04/16	Charlene Yorkovich	Blake Nynas	Scheduled Contract...	125.00	71.00		
05/04/16	Diane Rutherford	Laura Rutherford	Credit Card Payment			145.00	Automatic Payment
Total				1,272.90	1,059.90	145.00	

Features:
- Sortable columns
- Hot click-able to the Patient Information window

Figure 21-45: *Rollover Detail*

Fees Summary
Summary of all individual fee types charged, the total production create by these fees, and the total amount of those individual fee types for a specified time period.



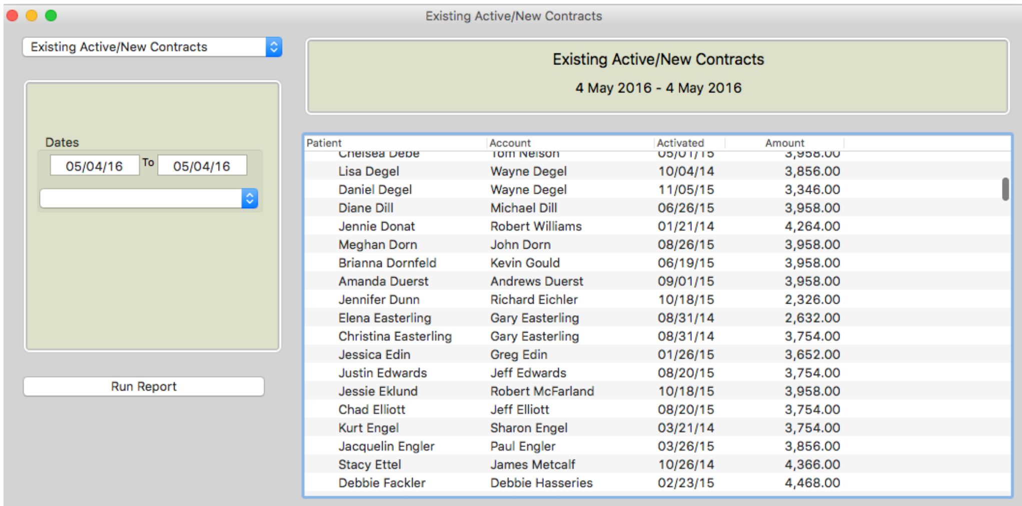
Procedure	Count	Production	Fees	Avg Fee	Cur Default Fee
▼Dr. Mary Bradly	2	7,500.00	1,875.00		
▼Main	2	7,500.00	1,875.00		
Initial Fee	1	7,500.00	1,875.00	1,875.00	
Set New Contract	1				
▼Dr. Eugenio Martins	529	140,685.00	62,942.71		
▼Main	377	107,070.00	50,389.81		
Set New Contract	324				
Scheduled Contract Fee	22		2,451.31	111.42	
Initial Fee	18	106,518.00	43,790.50	2,432.80	
Late-Payment Fee	5	45.00	45.00	9.00	
Deactivate Contract	4		3,596.00	899.00	
Change In Contract Schedule	2				
Retainer Replacement	1	247.00	247.00	247.00	
Records	1	260.00	260.00	260.00	
▼Satellite	152	33,615.00	12,552.90		
Set New Contract	112				
Scheduled Contract Fee	25		2,882.90	115.31	
Initial Fee	6	33,450.00	8,675.00	1,445.83	
Ledger Note	2				
Deactivate Contract	2		830.00	415.00	
Diagnostic Models	1	20.00	20.00	20.00	
Late-Payment Fee	1	5.00	5.00	5.00	
Panoramic Film	1	50.00	50.00	50.00	
Diagnostic Photos	1	25.00	25.00	25.00	
Cephalometric Film	1	65.00	65.00	65.00	
Total	531	148,185.00	64,817.71		

Features:
- Sortable columns
- Filter by doctor or office

Figure 21-46: *Fees Summary*

Existing Active/New Contracts

Lists all active contracts or new contracts activated in a specified time period. Active Contracts include New Contracts as part of the total.



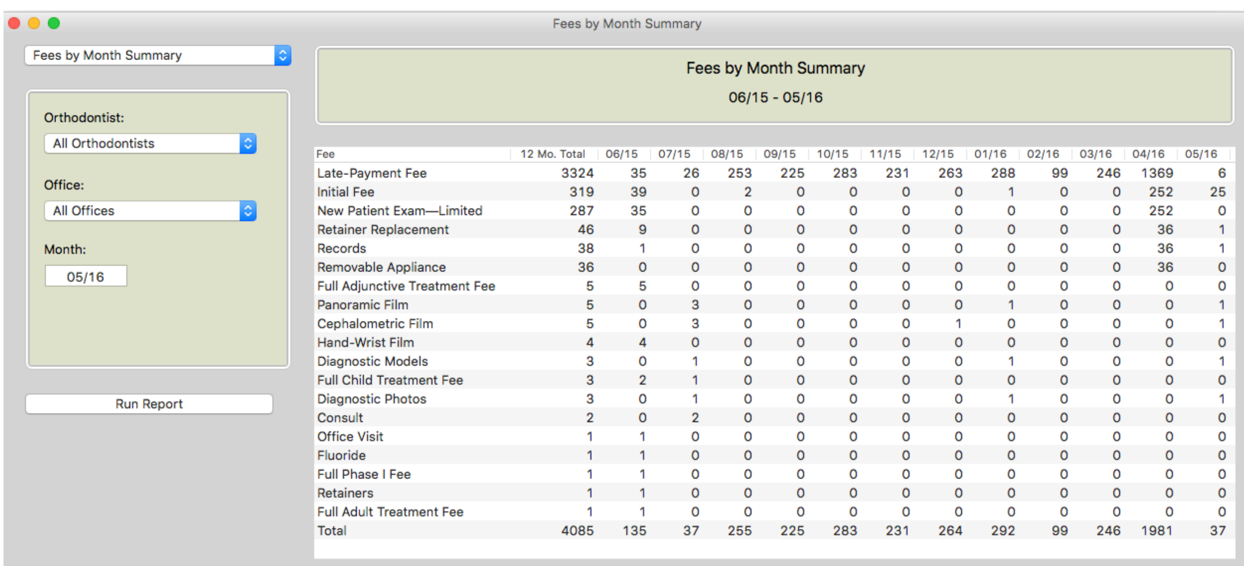
Patient	Account	Activated	Amount
Lisa Degel	Wayne Degel	10/04/14	3,856.00
Daniel Degel	Wayne Degel	11/05/15	3,346.00
Diane Dill	Michael Dill	06/26/15	3,958.00
Jennie Donat	Robert Williams	01/21/14	4,264.00
Meghan Dorn	John Dorn	08/26/15	3,958.00
Brianna Dornfeld	Kevin Gould	06/19/15	3,958.00
Amanda Duerst	Andrews Duerst	09/01/15	3,958.00
Jennifer Dunn	Richard Eichler	10/18/15	2,326.00
Elena Easterling	Gary Easterling	08/31/14	2,632.00
Christina Easterling	Gary Easterling	08/31/14	3,754.00
Jessica Edin	Greg Edin	01/26/15	3,652.00
Justin Edwards	Jeff Edwards	08/20/15	3,754.00
Jessie Eklund	Robert McFarland	10/18/15	3,958.00
Chad Elliott	Jeff Elliott	08/20/15	3,754.00
Kurt Engel	Sharon Engel	03/21/14	3,754.00
Jacquelin Engler	Paul Engler	03/26/15	3,856.00
Stacy Ettel	James Metcalf	10/26/14	4,366.00
Debbie Fackler	Debbie Hasseries	02/23/15	4,468.00

Features:
- Sortable columns

Figure 21-47: *Active/New Accounts*

Fees by Month Summary

Lists all fees charged for a 12 month period. Starts 12 months prior to the month specified.



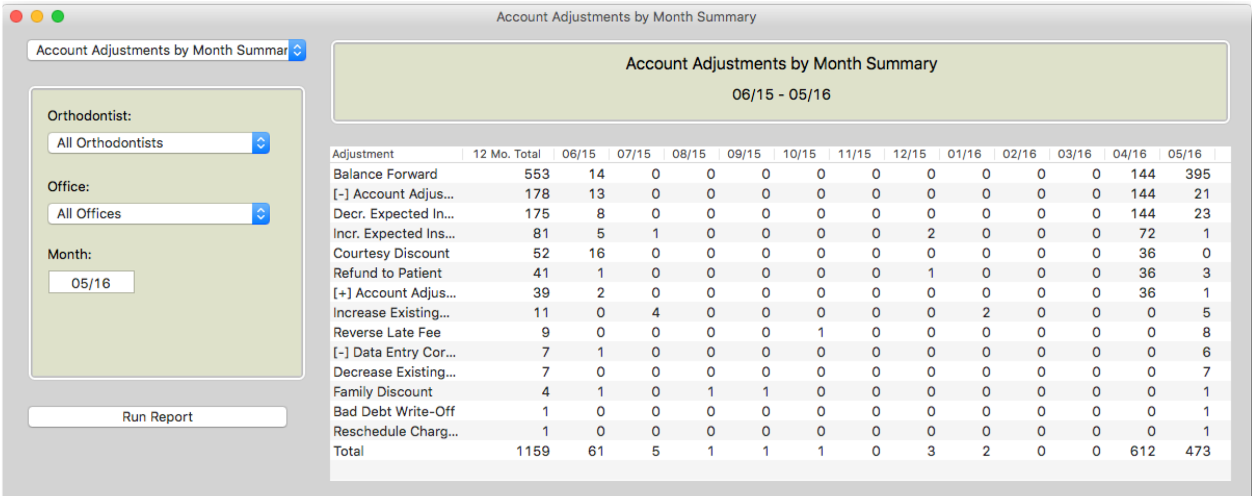
Fee	12 Mo. Total	06/15	07/15	08/15	09/15	10/15	11/15	12/15	01/16	02/16	03/16	04/16	05/16
Late-Payment Fee	3324	35	26	253	225	283	231	263	288	99	246	1369	6
Initial Fee	319	39	0	2	0	0	0	0	1	0	0	252	25
New Patient Exam—Limited	287	35	0	0	0	0	0	0	0	0	0	252	0
Retainer Replacement	46	9	0	0	0	0	0	0	0	0	0	36	1
Records	38	1	0	0	0	0	0	0	0	0	0	36	1
Removable Appliance	36	0	0	0	0	0	0	0	0	0	0	36	0
Full Adjunctive Treatment Fee	5	5	0	0	0	0	0	0	0	0	0	0	0
Panoramic Film	5	0	3	0	0	0	0	0	1	0	0	0	1
Cephalometric Film	5	0	3	0	0	0	0	1	0	0	0	0	1
Hand-Wrist Film	4	4	0	0	0	0	0	0	0	0	0	0	0
Diagnostic Models	3	0	1	0	0	0	0	0	1	0	0	0	1
Full Child Treatment Fee	3	2	1	0	0	0	0	0	0	0	0	0	0
Diagnostic Photos	3	0	1	0	0	0	0	0	1	0	0	0	1
Consult	2	0	2	0	0	0	0	0	0	0	0	0	0
Office Visit	1	1	0	0	0	0	0	0	0	0	0	0	0
Fluoride	1	1	0	0	0	0	0	0	0	0	0	0	0
Full Phase I Fee	1	1	0	0	0	0	0	0	0	0	0	0	0
Retainers	1	1	0	0	0	0	0	0	0	0	0	0	0
Full Adult Treatment Fee	1	1	0	0	0	0	0	0	0	0	0	0	0
Total	4085	135	37	255	225	283	231	264	292	99	246	1981	37

Figure 21-48: *Fees by Month Summary*

Features:
- Sortable columns
- Filterable by doctor or office

Account Adjustments by Month Summary

Lists the number of account adjustments given for a 12-month period prior to the month specified.



Adjustment	12 Mo. Total	06/15	07/15	08/15	09/15	10/15	11/15	12/15	01/16	02/16	03/16	04/16	05/16
Balance Forward	553	14	0	0	0	0	0	0	0	0	0	144	395
[-] Account Adjus...	178	13	0	0	0	0	0	0	0	0	0	144	21
Decr. Expected In...	175	8	0	0	0	0	0	0	0	0	0	144	23
Incr. Expected Ins...	81	5	1	0	0	0	0	2	0	0	0	72	1
Courtesy Discount	52	16	0	0	0	0	0	0	0	0	0	36	0
Refund to Patient	41	1	0	0	0	0	0	1	0	0	0	36	3
[+] Account Adjus...	39	2	0	0	0	0	0	0	0	0	0	36	1
Increase Existing...	11	0	4	0	0	0	0	0	2	0	0	0	5
Reverse Late Fee	9	0	0	0	0	1	0	0	0	0	0	0	8
[-] Data Entry Cor...	7	1	0	0	0	0	0	0	0	0	0	0	6
Decrease Existing...	7	0	0	0	0	0	0	0	0	0	0	0	7
Family Discount	4	1	0	1	1	0	0	0	0	0	0	0	1
Bad Debt Write-Off	1	0	0	0	0	0	0	0	0	0	0	0	1
Reschedule Charg...	1	0	0	0	0	0	0	0	0	0	0	0	1
Total	1159	61	5	1	1	1	0	3	2	0	0	612	473

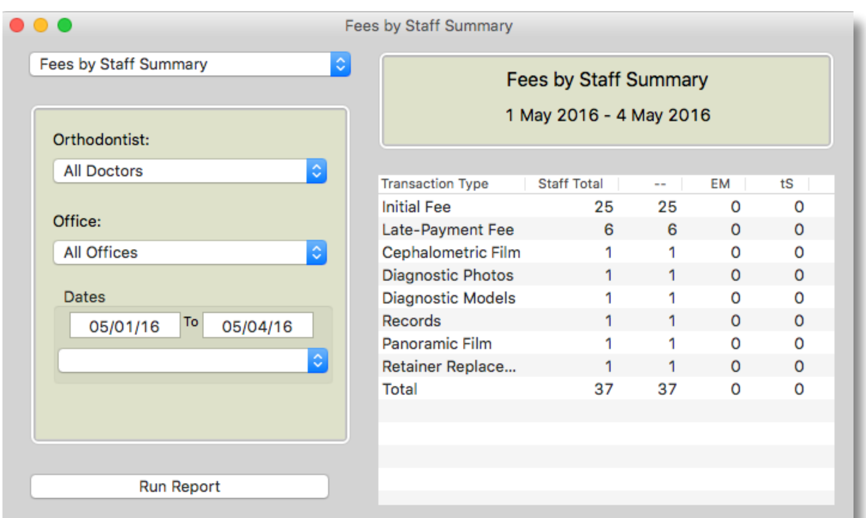
Figure 21-49: *Account Adjustments by Month Summary*

Features:

- Sortable columns
- Filter by doctor or office

Fees by Staff Summary

Shows number of fees generated by each staff member (per workstation sign in) for a specified time frame.



Transaction Type	Staff Total	--	EM	tS
Initial Fee	25	25	0	0
Late-Payment Fee	6	6	0	0
Cephalometric Film	1	1	0	0
Diagnostic Photos	1	1	0	0
Diagnostic Models	1	1	0	0
Records	1	1	0	0
Panoramic Film	1	1	0	0
Retainer Replace...	1	1	0	0
Total	37	37	0	0

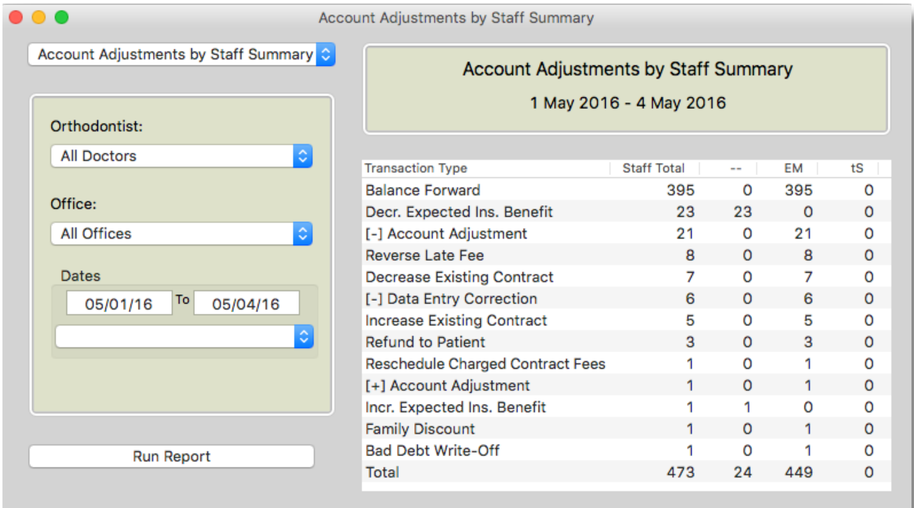
Features:

- Sortable columns
- Filter by doctor or office

Figure 21-50: *Fees by Staff Summary*

Account Adjustments by Staff Summary

List all account adjustments made by individuals in your practice. The column headers indicate the initial of the individual responsible for creating the account adjustment.



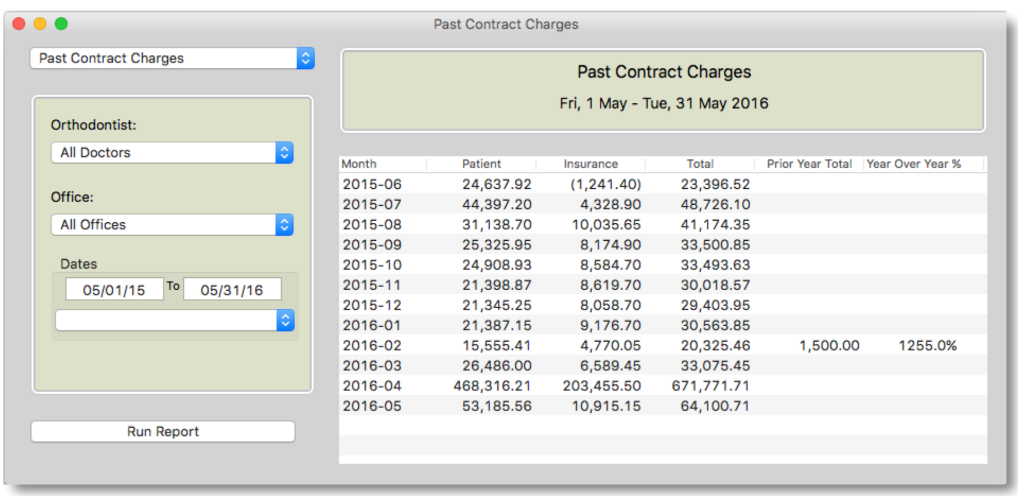
Transaction Type	Staff Total	--	EM	tS
Balance Forward	395	0	395	0
Decr. Expected Ins. Benefit	23	23	0	0
[-] Account Adjustment	21	0	21	0
Reverse Late Fee	8	0	8	0
Decrease Existing Contract	7	0	7	0
[-] Data Entry Correction	6	0	6	0
Increase Existing Contract	5	0	5	0
Refund to Patient	3	0	3	0
Reschedule Charged Contract Fees	1	0	1	0
[+] Account Adjustment	1	0	1	0
Incr. Expected Ins. Benefit	1	1	0	0
Family Discount	1	0	1	0
Bad Debt Write-Off	1	0	1	0
Total	473	24	449	0

Features:
- Sortable columns
- Filter by doctor or office

Figure 21-51: *Account Adjustments by Staff Summary*

Past Contract Charges

Lists the monthly totals for all contract charges **that have already been charged** for a specified date range



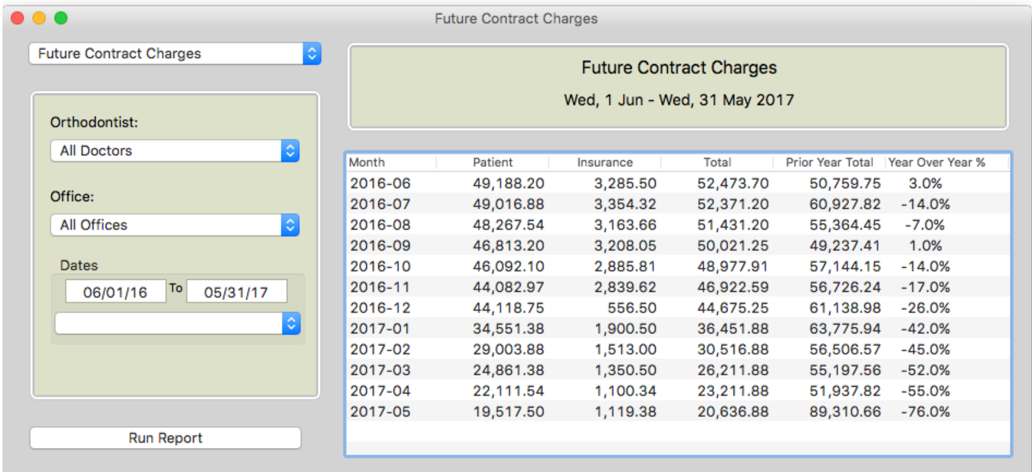
Month	Patient	Insurance	Total	Prior Year Total	Year Over Year %
2015-06	24,637.92	(1,241.40)	23,396.52		
2015-07	44,397.20	4,328.90	48,726.10		
2015-08	31,138.70	10,035.65	41,174.35		
2015-09	25,325.95	8,174.90	33,500.85		
2015-10	24,908.93	8,584.70	33,493.63		
2015-11	21,398.87	8,619.70	30,018.57		
2015-12	21,345.25	8,058.70	29,403.95		
2016-01	21,387.15	9,176.70	30,563.85		
2016-02	15,555.41	4,770.05	20,325.46	1,500.00	1255.0%
2016-03	26,486.00	6,589.45	33,075.45		
2016-04	468,316.21	203,455.50	671,771.71		
2016-05	53,185.56	10,915.15	64,100.71		

Features:
- Sortable columns

Figure 21-52: *Past Contract Charges*

Future Contract Charges

Lists the monthly totals for all contract charges that will be charged for a specified date range.



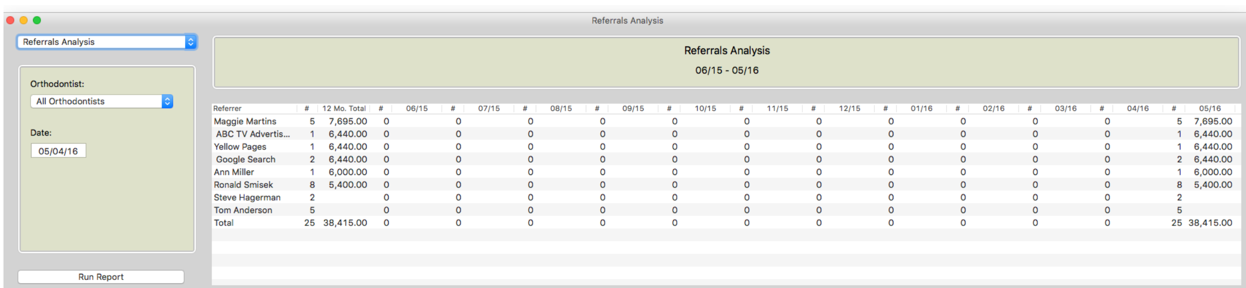
Month	Patient	Insurance	Total	Prior Year Total	Year Over Year %
2016-06	49,188.20	3,285.50	52,473.70	50,759.75	3.0%
2016-07	49,016.88	3,354.32	52,371.20	60,927.82	-14.0%
2016-08	48,267.54	3,163.66	51,431.20	55,364.45	-7.0%
2016-09	46,813.20	3,208.05	50,021.25	49,237.41	1.0%
2016-10	46,092.10	2,885.81	48,977.91	57,144.15	-14.0%
2016-11	44,082.97	2,839.62	46,922.59	56,726.24	-17.0%
2016-12	44,118.75	556.50	44,675.25	61,138.98	-26.0%
2017-01	34,551.38	1,900.50	36,451.88	63,775.94	-42.0%
2017-02	29,003.88	1,513.00	30,516.88	56,506.57	-45.0%
2017-03	24,861.38	1,350.50	26,211.88	55,197.56	-52.0%
2017-04	22,111.54	1,100.34	23,211.88	51,937.82	-55.0%
2017-05	19,517.50	1,119.38	20,636.88	89,310.66	-76.0%

Features:
- Sortable columns

Figure 21-53: *Future Contract Charges*

Referral Analysis

Displays the amount of money and total dollar amount generated by referrals for the 12 month period prior to the date specified. Also shows the number of active contracts generated by each referrer. *Note: Monies are credited to the referrer for the month that the referral is entered.



Referrer	#	12 Mo. Total	#	06/15	#	07/15	#	08/15	#	09/15	#	10/15	#	11/15	#	12/15	#	01/16	#	02/16	#	03/16	#	04/16	#	05/16
Maggie Martins	5	7,695.00	0		0		0		0		0		0		0		0		0		0		0		5	7,695.00
ABC TV Advertis...	1	6,440.00	0		0		0		0		0		0		0		0		0		0		0		1	6,440.00
Yellow Pages	1	6,440.00	0		0		0		0		0		0		0		0		0		0		0		1	6,440.00
Google Search	2	6,440.00	0		0		0		0		0		0		0		0		0		0		0		2	6,440.00
Ann Miller	1	6,000.00	0		0		0		0		0		0		0		0		0		0		0		1	6,000.00
Ronald Smisek	8	5,400.00	0		0		0		0		0		0		0		0		0		0		0		8	5,400.00
Steve Hagerman	2		0		0		0		0		0		0		0		0		0		0		0		2	
Tom Anderson	5		0		0		0		0		0		0		0		0		0		0		0		5	
Total	25	38,415.00	0		0		0		0		0		0		0		0		0		0		0		25	38,415.00

Figure 21-56: *Referral Analysis*

Features:
- Sortable columns
- Filterable by doctor

Suggested Uses:
- Helpful in rewarding or acknowledging referrers that generate revenue (not just those who refer patients that may never get treatment)

Patient Postcodes Analysis

Lists every postal code in the database, the city of the code, and the number of patients in that postal code.

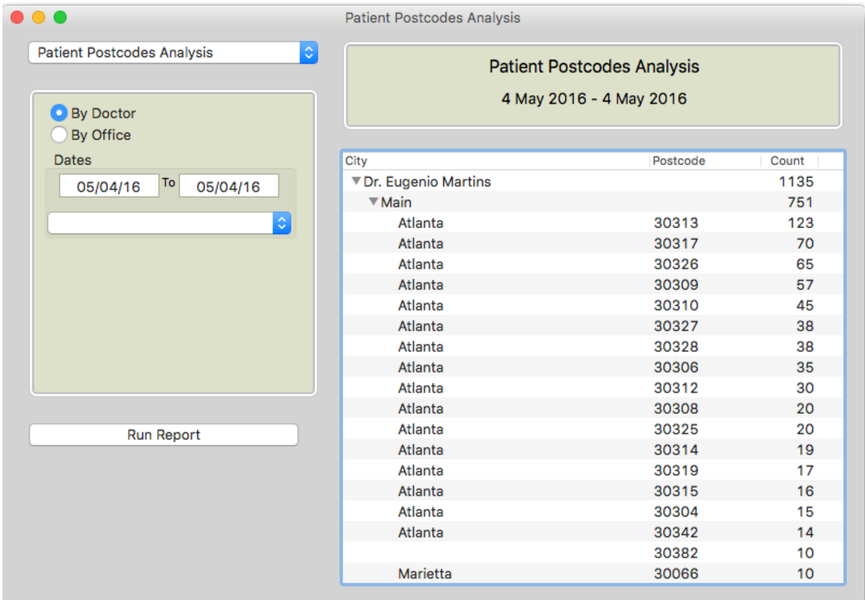


Figure 21-57: *Patient Post codes Analysis*

Features:
•Sortable columns

Suggested Uses:
•Identifies geographic locales in which you may want to focus your marketing

Unusual Family Balances

Lists patients who have a positive due amount, while another family member has a negative due amount.

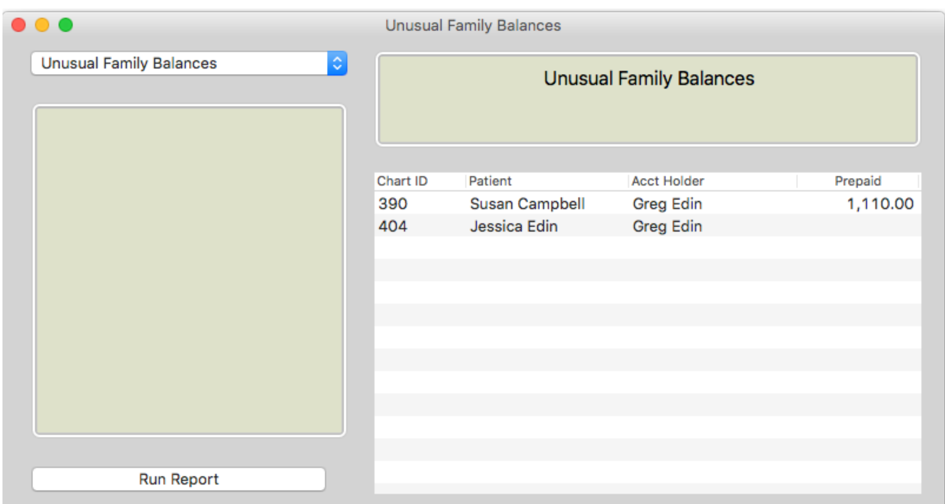


Figure 21-58: *Unusual Family Balances*

Features:
•Sortable columns

Suggested Uses:
•Helpful in indicating a payment that may have been posted to the wrong family member

Insurance Setup Validation

Lists patients whose topsOrtho records contain incomplete insurance information.

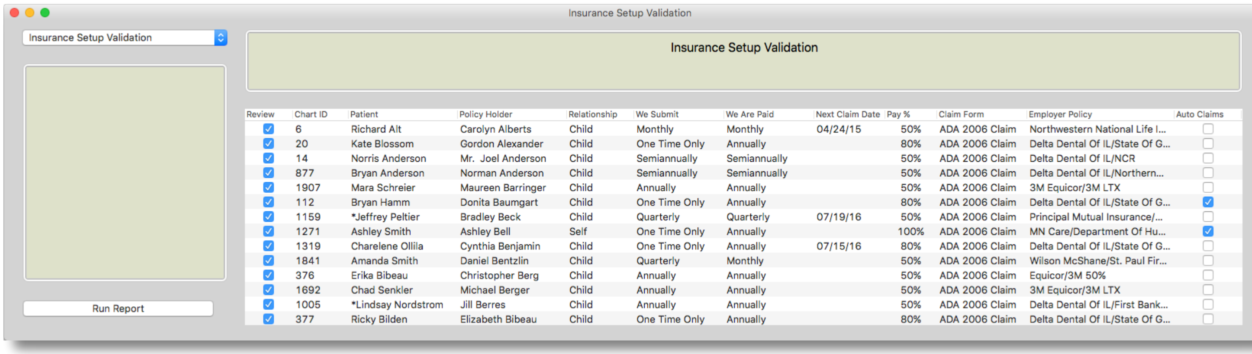


Figure 21-59: *Insurance Setup Validation*

Features:

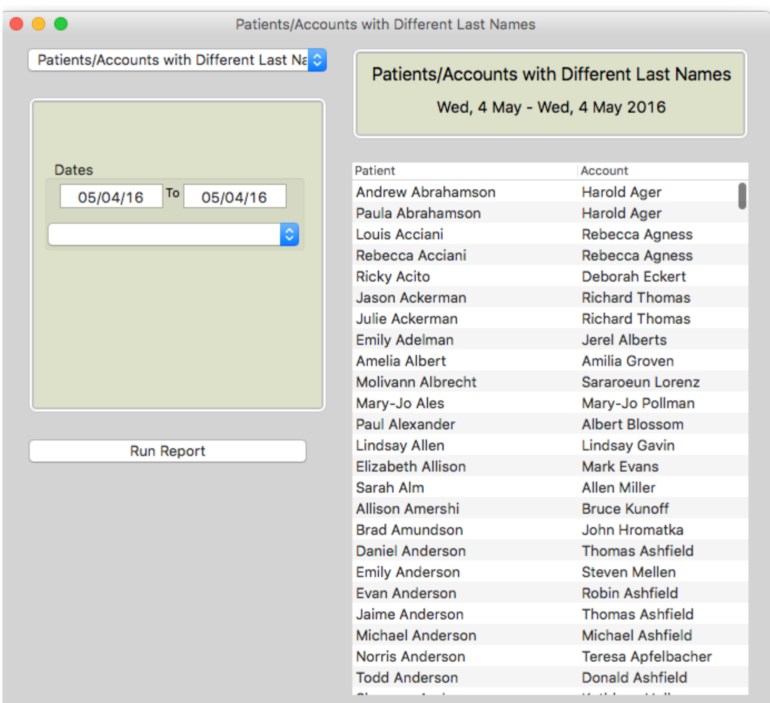
- Sortable columns

Suggested Uses:

- Helpful in keeping data clean so that insurance claim forms are filled out properly
- Listings with any blank items should be reviewed

Patient/Accounts with Different Last Names

Lists all patients whose account holder has a different last name.



Features:

•Sortable columns

Figure 21-60: *Patients/Accounts with Different Last Names*

Summary

In this lesson, you should feel confident with:

- Viewing topsOrtho lists
- Viewing topsOrtho reports

Lesson 22 D7 Matrix Analytics

Lesson Twenty-Two Overview

This lesson focuses on the D7 Matrix. D7 Matrix analytics will pinpoint every patient in your practice. We worked with leading orthodontic practice consultants and developed the right way to track your patient treatment statuses. D7 Matrix uses multiple dimensions of data to pinpoint patients and dissect your practice information.

Objectives:

To become familiar with thePractice Monitor Report, you will:

22A How to use the fields for D7 Matrix
All items, and how to complete the fields for proper analytics.

22B How to set up D7 Matrix
All items, and how to set up for D7 Matrix analytics will be discussed.

22C How to enjoy D7 Matrix
All items, and how to set up for D7 Matrix analytics will be discussed.

22D Definitions
Definitions as associated with D7 Matrix analytics.

22A Fields Used with D7 Matrix Analytics

First things first, when you enter the Diagnosis and Treatment Plan set the Treatment Plan Title (name the plan whatever you'd like), select the Treatment Phase, Treatment Method, and Dental Classification. For current patients verify the Method, Phase & Classification are accurate. Associated terminology is discussed later.
Dx/Tx Plan:

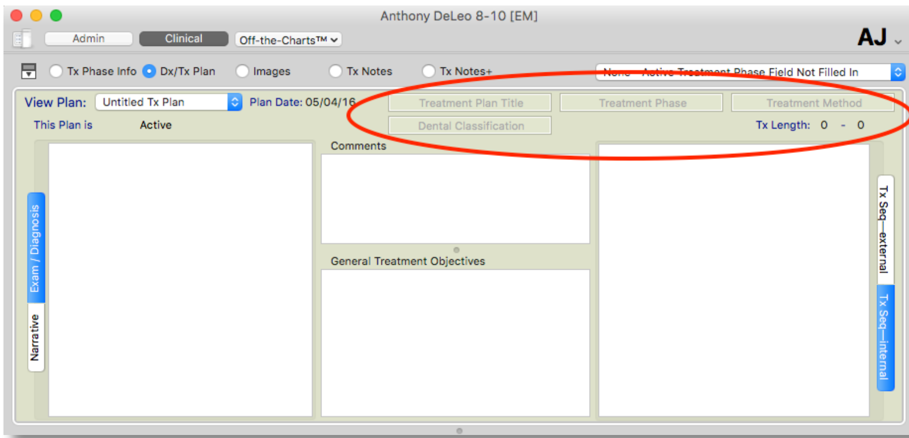


Figure 22-1: *Dx Tx Plan*

The fields can also be viewed and edited in Tx Notes+.

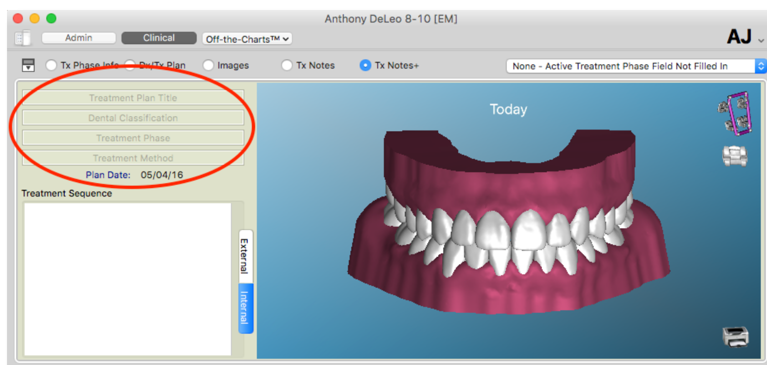


Figure 22-2: *Tx Notes +*

Choose the Treatment Coordinator that will work with the Patient.

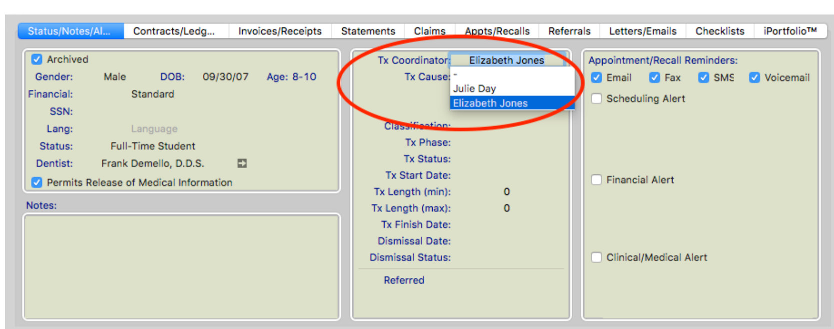


Figure 22-3: *Treatment Coordinator*

At each patient's appointment verify the Treatment Status is correct, and select the proper Disposition (where the patient is headed next in treatment). A Disposition must be entered to move to the Next Procedure field.

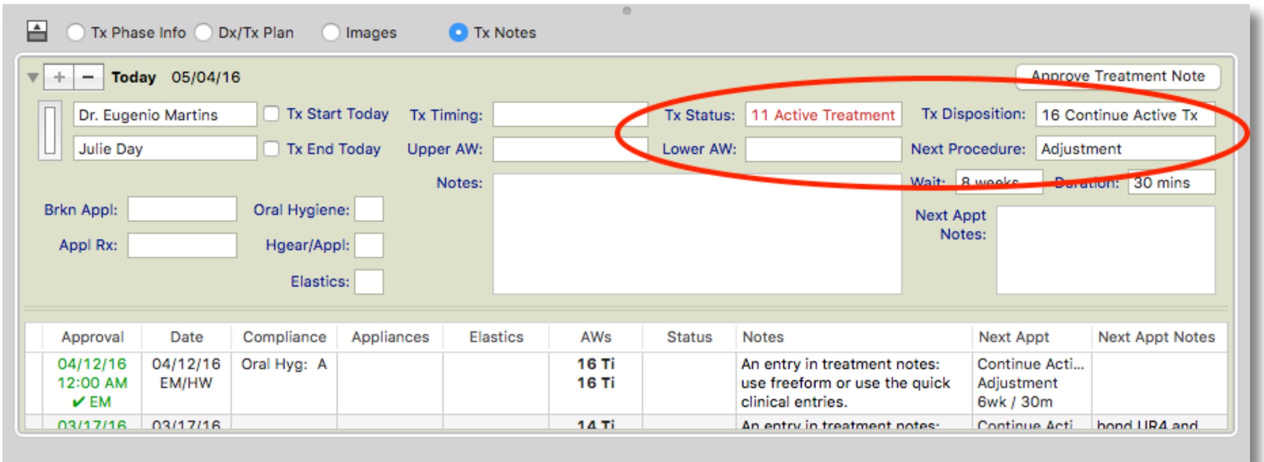


Figure 22-4: *Tx Status and Disposition*

If necessary, set the patient's Financial Status, which is customizable in Practice Setup/ Labels. The default Financial Status will be set to Standard.

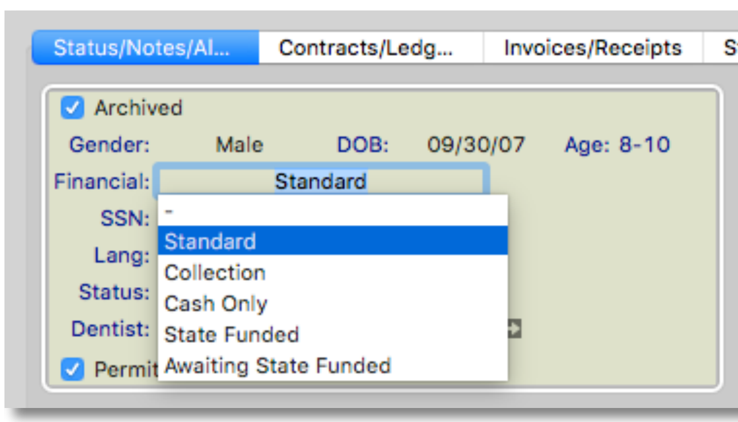


Figure 22-5: *Financial Status*

At the end of your patient appointment cycle (6-12 weeks) you'll have good, clean information in the D7 Matrix and pinpoint every patient in your practice.

22B Set up For D7 Matrix Analytics

Link Procedures and Treatment Statuses. You want to do this so the Treatment Status will change when the patient checks in. Here's how:

1. From Practice Setup..., select Calendar and Clinical Procedures.
2. From the Procedure Name list, click on a Procedure.
3. At the center of the window, click in the When appointment is Kept, change Tx Status to: box.
4. From the list, select the associated Treatment Status.
5. Verify the checkboxes below the Treatment Status are checked to track if the appointment counts as a New Patient Exam, Alerts the Treatment Coordinator, Begins, Completes Treatment, etc.
6. Make sure Emergency Appointments have the Emergency checkbox checked, too.

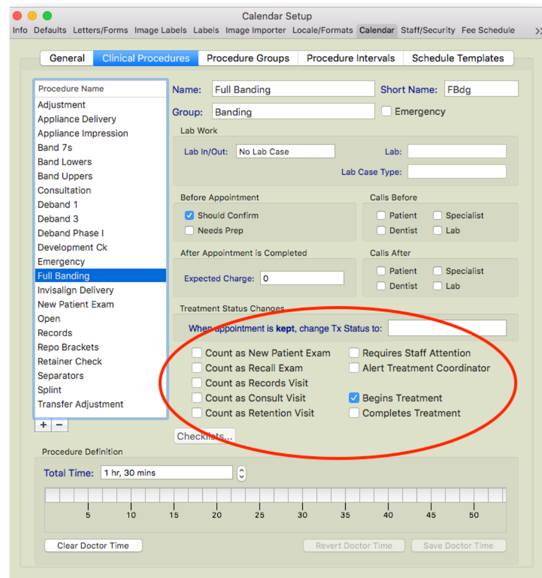


Figure 22-6: *Procedure Set up*

The Tx Status will change when the patient checks in for their appointment and display in the Tx Notes section in red. However, this change in status only occurs for appointments scheduled after set up. Be sure to check statuses at each patient's appointment.

Link Dispositions to the Usual Next Appointment. This will make the Appointment auto-populate when you select the Disposition. Here's how:

1. From Practice Setup..., select Labels.
2. From the Labels Type drop-down menu, choose Treatment Disposition.
3. Start with the first Disposition in the list and click on the first row.
4. Click in the Usual Next Appointment field.
5. From the drop-down list of appointments, select the Usual Next Appointment for each Treatment Disposition.
6. Continue for each Disposition.

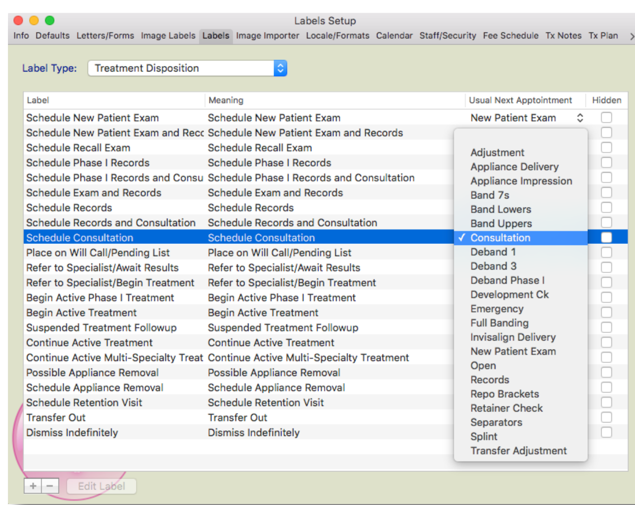


Figure 22-7: *Link Disposition*

Customize Treatment Methods to track treatment length and profitability. Here's how:

1. From Practice Setup..., select Labels.
2. From the Labels Type menu, choose Treatment Methods.
3. To edit a method, click it and press the Edit Label button.
4. To add a method, click the plus (+) and enter your method.
5. To edit a method click the method and click the Edit Label button (you won't be able to edit the meaning, and it's OK). You'll get a warning message if the method has been used, read it over to see how the edit will affect those records.

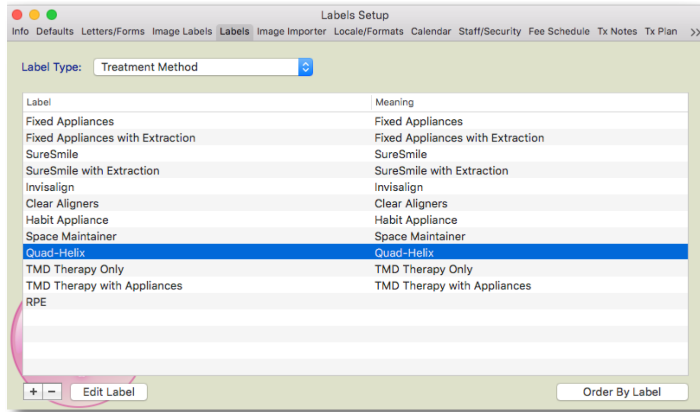


Figure 22-8: *Treatment Methods*

Treatment Methods are used to determine how long it takes to complete each method and determine method profitability. Treatment Methods should not overlap. A patient cannot be in two (or more) methods simultaneously (i.e., SureSmile and Fixed Appliances with Extractions) if they can, a method is necessary for all of the variables (i.e., SureSmile Fixed Appliances with Extractions and SureSmile Fixed Appliances without Extractions). There is no limit on how many methods you can create, but more may not always be better. Too many methods may water down the D7 Matrix analytics.

Customize Financial Statuses to better track the various financial situations in your practice. Here's how:

1. From Practice Setup..., select Labels.
2. From the Labels Type menu, choose Financial Status.
3. To add a status, click the plus (+) and enter the Financial Status. You can add as many financial statuses as you'd like.
4. To edit a status click the Financial Status and click the Edit Label button (you won't be able to edit the meaning, and it's OK). You'll get a warning message if the status has been used, read it over to see how the edit will affect those records.

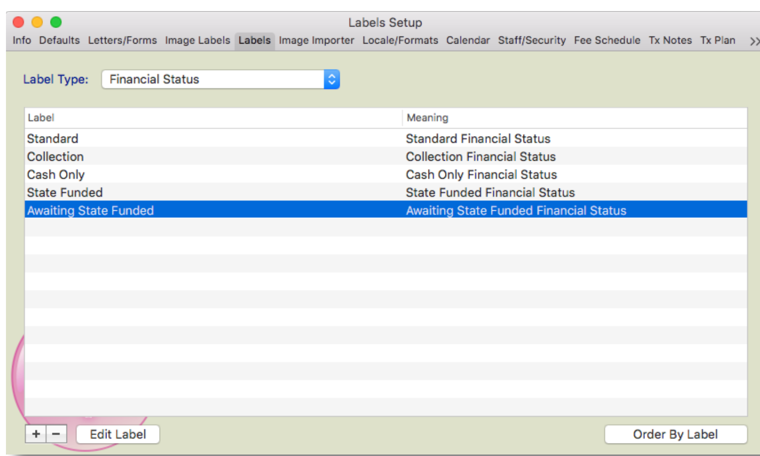


Figure 22-9: *Financial Status*

Set Treatment Coordinators for better tracking. Here's how:

1. From Practice Setup..., select Staff/Security Setup.
2. From the list of staff members, select the Treatment Coordinator's name.
3. Check the Treatment Coordinator checkbox. Treatment Coordinators will have the ability to view the D7 Matrix. Doctors have the privilege to view the D7 Matrix analytics by default.

Assign privileges to key staff members. Here's how:

1. From Practice Setup..., select Staff/Security Setup.
2. Click on the Staff Member's Name.
3. Scroll down to the bottom of the privileges list and click the privilege checkbox for each staff member.

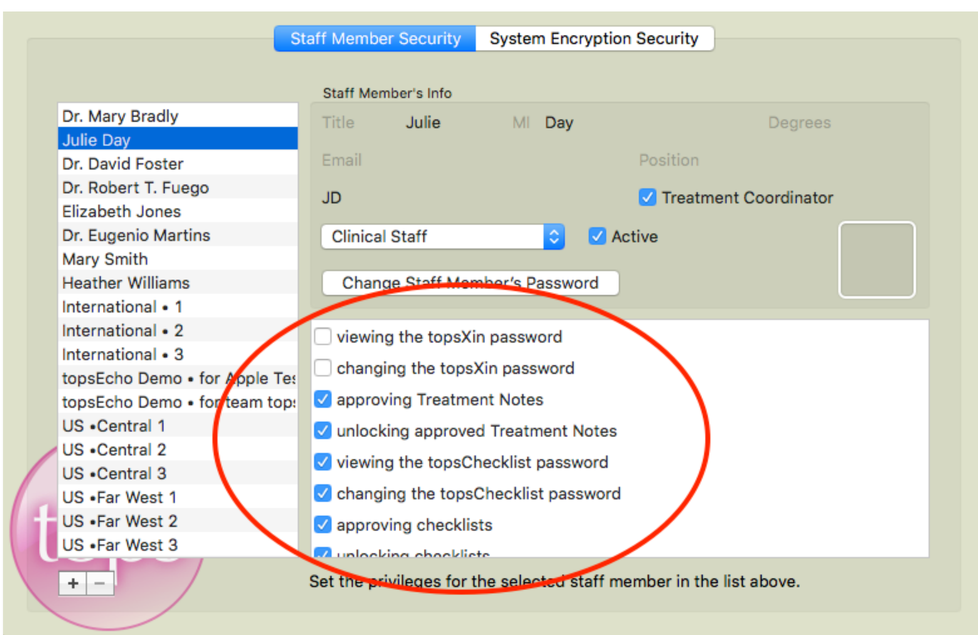


Figure 22-10: *Privileges*

22C How to Access D7 Matrix Analytics:

Here's how you access the D7 Matrix/Treatment Status List:

1. From the menu bar, click ***Matrix***.

2. From the list menu, click **D7 *Treatment Status***, the default filter is by: Status, Phase & Method.

Here's how you use it:

1. From the task menu, select the ***task*** you would like to display.

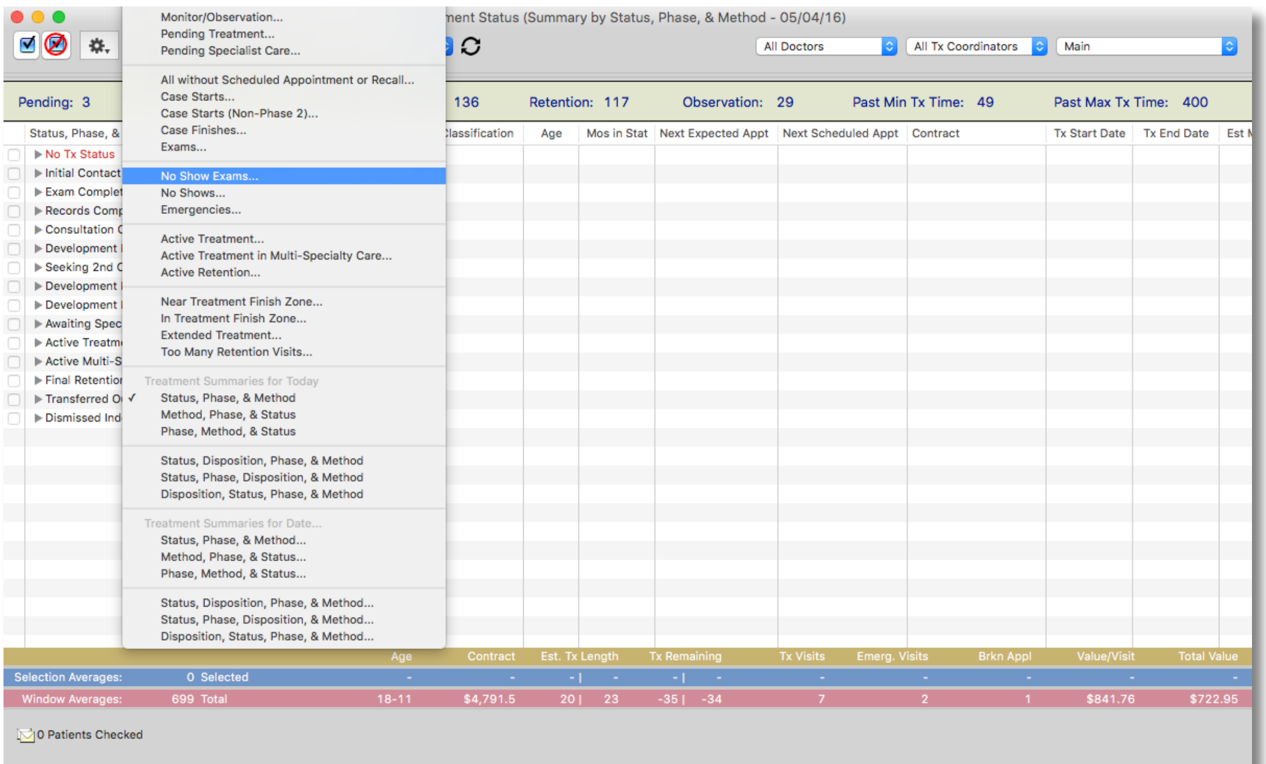
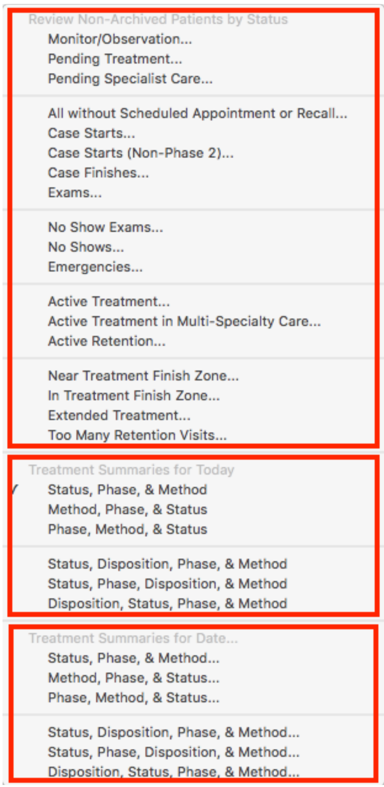


Figure 22-11: *D7 Matrix Task Menu*

2. From the list, click the ***disclosing triangles*** (on the left side of the list) to open up each level and display more information.

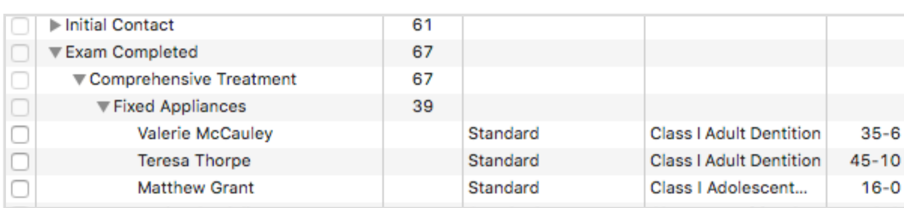


The numbers displayed are month-to-date when you choose a task from the top section of the task menu.

The numbers displayed are for today only when you choose from the middle section of the task menu.

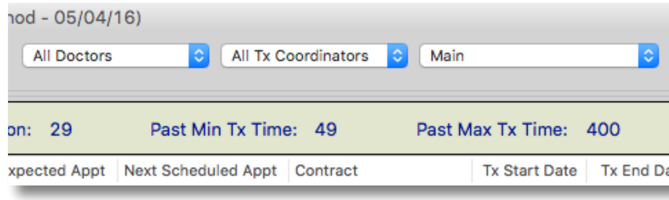
The numbers displayed are for the date selected when you choose from the bottom section of the task menu.

3. To quickly open all levels in a group, hold down the ***option key*** and press the upper-most ***disclosing triangle***. Click it again to close the levels.



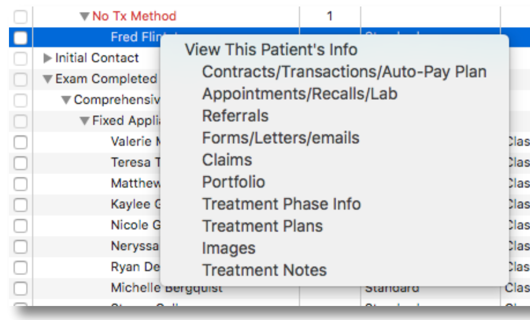
4. Missing Statuses are displayed at the top of the list in red.

5. To filter the list by Doctor, Tx Coordinator, or Location, choose from the pop-up menu.



6. To open a patient's chart from the list, double click their ***name*** to jump directly to their Treatment Notes.

7. You can also move directly to a specific area in the patient's chart. Right click the ***patient's name*** to display a contextual menu and chose where you want to go.



8. If you would like to reorganize the list, click the ***column headers*** to sort, or drag & drop ***columns***. You can select a group of patients (click and drag along your selection) or select specific patients (hold the command key and click individual rows) to get totals and averages. There's a lot to see and do in the D7 Matrix. Scroll to the right to see more columns.

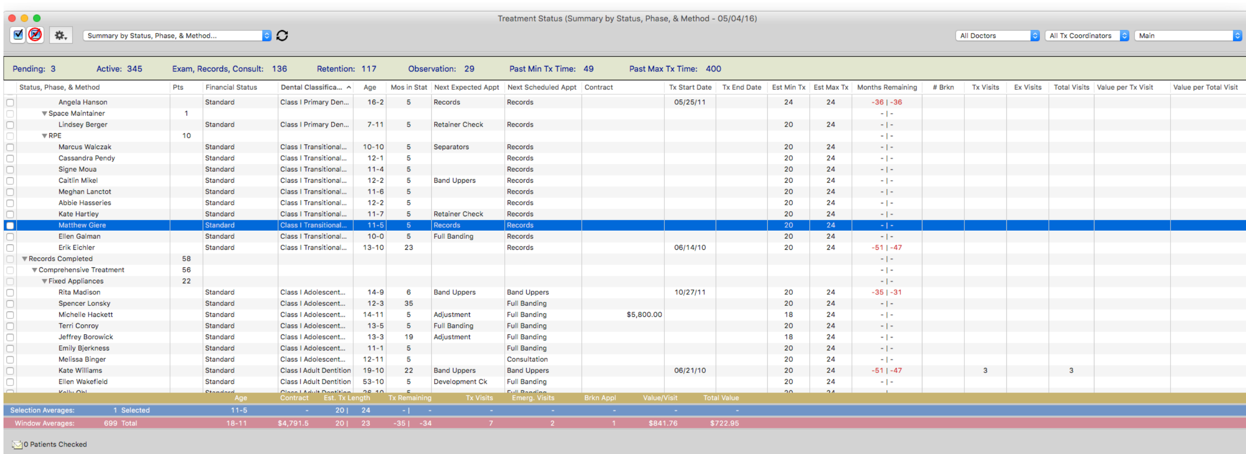


Figure 22-12: *D7 Matrix*

Spend some time in the D7 Matrix. Go ahead and open up the various tasks, view all the columns, and play around. You'll be surprised at how much information you can find. It will probably take a full patient cycle (weekly interval in which you see patients) for the D7 Matrix analytics to truly display your office's statistics.

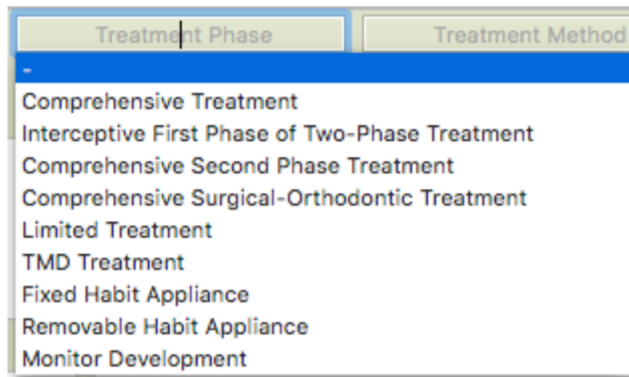
22D Definitions

The key parts of the D7 Matrix are defined below, where necessary.

Treatment Category/Phase
Treatment Categories/Phases are defined by the ADA, and are the different phases of treatment. Pick the correct one for each patient. **Categories/Phases are fixed and cannot be edited in Practice Setup**. Treatment Categories/Phases were also referred to as Treatment Types in previous versions of topsOrtho. These fields are found in Treatment Notes + and Dx/Tx Plan.

Full List of Treatment Categories/Phases

- Comprehensive Treatment
- Interceptive First Phase of Two-Phase Treatment
- Comprehensive Second Phase Treatment
- Comprehensive Surgical-Orthodontic Treatment
- Limited Treatment
- TMD Treatment (Temporomandibular Disorder Treatment)
- Fixed Habit Appliance
- Monitor Development



Treatment Method
Treatment Methods are the ways you treat patients. Treatment Methods are found in Treatment Notes + and Dx/Tx Plan.

Treatment Methods are used to determine how long it takes to complete each method and determine how profitable you are for each method. Treatment Methods should not overlap. A patient cannot be in two (or more) methods simultaneously (i.e., SureSmile and Fixed Appliances with Extractions) if they can, a method is necessary for all the variables (i.e., SureSmile Fixed Appliances with Extractions and SureSmile Fixed Appliances without Extractions).

Full List of Treatment Methods

- Fixed Appliances
- Fixed Appliances with Extraction
- SureSmile
- SureSmile with Extraction
- Invisalign
- Clear Aligners
- Habit Appliance
- Space Maintainer
- Quad-Helix
- TMD Therapy Only
- TMD Therapy with Appliances

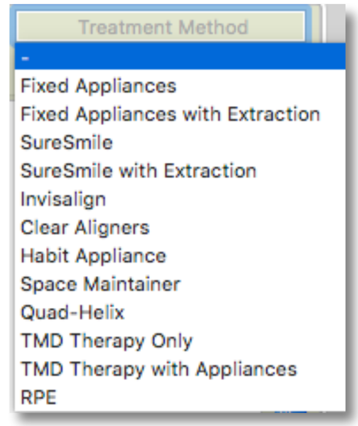


Figure 22-14: *Treatment Method*

Dental Classification
Dental Classifications are the classes of malocclusion and they are defined by the ADA. The classifications **are fixed and cannot be edited in Practice Setup**. The fields are found in Treatment Notes + and Dx/Tx Plan. Pick the Classification from the list provided for each patient.

Full List of Dental Classifications

- Class I Primary Dentition
- Class I Transitional Dentition
- Class I Adolescent Dentition
- Class I Adult Dentition
- Class II Primary Dentition
- Class II Transitional Dentition
- Class II Adolescent Dentition
- Class II Adult Dentition
- Class III Primary Dentition
- Class III Transitional Dentition
- Class III Adolescent Dentition
- Class III Adult Dentition

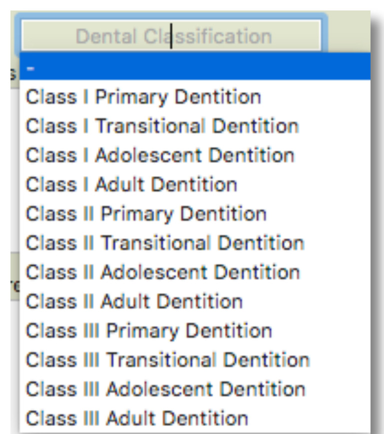


Figure 22-15: *Dental Classification*

Treatment Status
The Treatment Status field was created to track where each patient is in treatment right now. Are they in active treatment or are records complete? Get familiar with Treatment Statuses. **Statuses are fixed and cannot be edited**. Pick the status that your patient is in right now from the choices provided. Statuses will carry over from appointment to appointment.

Full List of Treatment Statuses

- Initial Contact (Patient called to schedule new patient exam)
- Exam Completed (New patient exam finished)
- Records Completed (Records taken)
- Consultation Completed (Treatment Plan presented to the patient)
- Development Monitored-Not Ready For Initial Tx (Patient not ready and will be monitored on a recall basis)
- Will Call (Pending) (Patient not ready to start and states they will "call back")
- Seeking 2nd Opinion (Patient not ready to start and will get another opinion)
- Tx Declined (Patient rejected treatment plan and will not start treatment)
- Awaiting Specialist Results (Patient sent to specialist for any treatment that is required before they can start orthodontic treatment)
- Active Treatment (Patient is in treatment. Can be either Phase I or Phase II)
- Active Multi-Specialty Tx (Patient is in treatment in conjunction with another Specialist, i.e. surgical case)
- Tx Suspended (Treatment is suspended and could be due to non payment)
- Development Monitored without Retention (Phase I complete and no retention is necessary)
- Development Monitored with Retention (Phase I complete with retention)
- Final Retention (Braces (not Phase I) have been removed and retainers placed, patient being seen for active retainer checks)
- Transferred Out (Patient moved and transferred to another Orthodontist)
- Dismissed Indefinitely (Patient is finished with retainer checks and is considered dismissed)

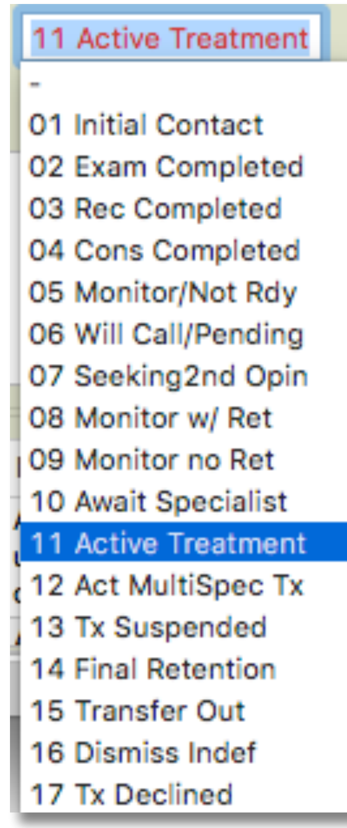


Figure 22-16: *Treatment Status*

Treatment Dispositions

Treatment Dispositions were designed to tell you **generally** what comes next for the patient, i.e., Schedule Records, Begin Active Treatment or Continue Active Treatment. Dispositions are used to track where you want the patient to head to next in treatment. Future appointments can tell you part of the story, but if the patient doesn't make an appointment or misses an appointment, we won't have the information on what should happen next for that patient.

However, dispositions are not comprehensive terms.

Dispositions are fixed and cannot be edited.

Full List of Treatment Dispositions

- Schedule New Patient Exam
- Schedule New Patient Exam and Records
- Schedule Recall Exam
- Schedule Phase I Records
- Schedule Phase I Records and Consultation
- Schedule Exam and Records
- Schedule Records
- Schedule Records and Consultation
- Schedule Consultation
- Place on Will Call/Pending List
- Refer to Specialist/Await Results
- Refer to Specialist/Begin Treatment
- Begin Active Phase I Treatment
- Begin Active Treatment
- Suspended Treatment Followup
- Continue Active Treatment
- Continue Active Multi-Specialty Treatment
- Possible Appliance Removal
- Schedule Appliance Removal
- Schedule Retention Check
- Transfer Out
- Dismiss Indefinitely

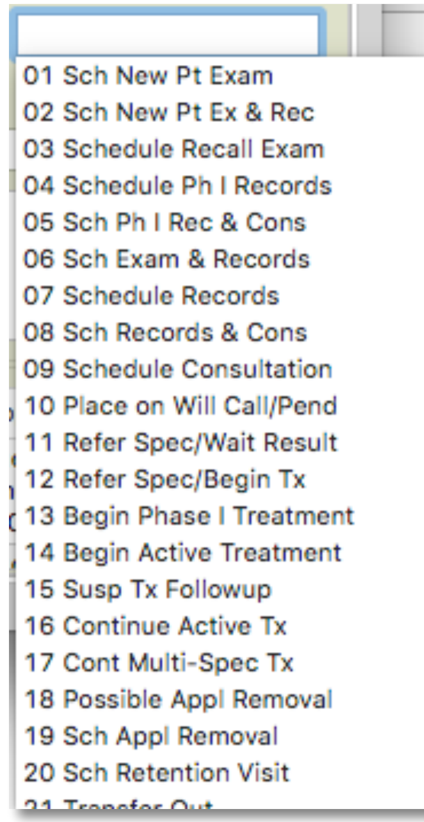


Figure 22-17: *Disposition*

Summary

In this lesson, you should feel confident with:

- Using the D7 Matrix analytics
- Setting up for D7 Matrix analytics
- Definitions used in D7 Matrix analytics

Lesson 23 Practice Monitor

Lesson Twenty-Three Overview

This lesson focuses on the Practice Monitor Report. The topsOrtho™ Practice Monitor is a real-time statistics reporting window that provides a snapshot of how your practice is performing. This guide is designed to explain each aspect of the Practice Monitor and how statistics are generated.

Objectives:

To become familiar with thePractice Monitor Report, you will:

23A Introduction to the Practice Monitor Report
All items, and how those numbers are generated, will be discussed.

Figure 23-1: *Practice Monitor*

Important Information

- The significance of statistics generated by the Practice Monitor is determined by you, and, if applicable, your practice consultant. tops Software does not offer advice on what the statistics in your practice should be.

- Statistics are generated from very specific information from within topsOrtho. These data-retrieval methods are fixed for the listed statistics.

- Not every statistic has a corresponding report.

- The Practice Monitor's statistics are only as good as the original information entered into topsOrtho.

- Comparisons can be made between different dates by viewing multiple Practice Monitor windows at once.

23A The Practice Monitor

Opening and Viewing

1. From the menu bar, select Reports.
2. Select Practice Monitor.
    - Displays current month.
    - Reports are for an entire practice (All Offices and All Doctors); the Practice Monitor does not differentiate between offices or doctors.
    - Statistics show as Loading... until calculations are complete.
    - Statistics populate in real time.
    - Press the single arrows to move one month earlier (<) or later (>).
    - Press the double arrows to move one year earlier (<<) or later (>>)
    - To compare points in time, open multiple report windows and use arrows to navigate.

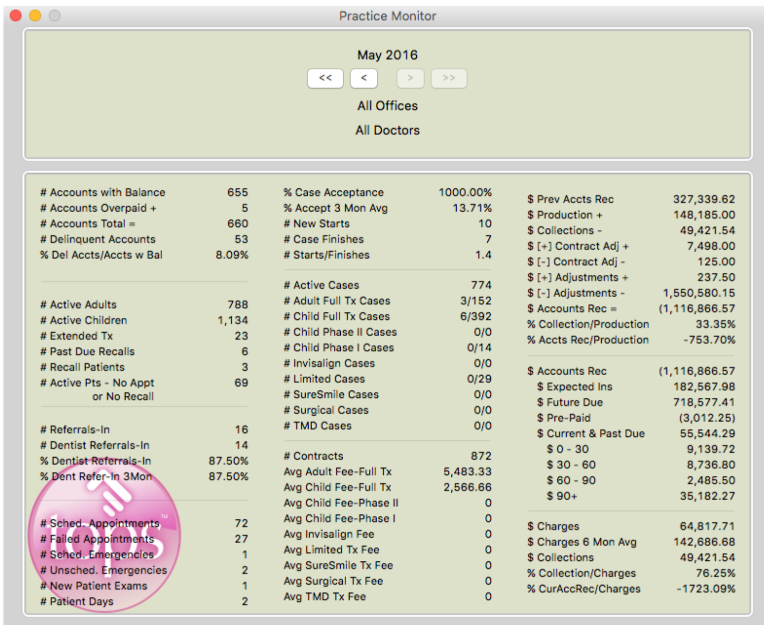


Figure 23-2: *Practice Monitor*

Interpreting the Practice Monitor

The following pages explain each statistic listed in the Practice Monitor. Where necessary, instructions are provided for setting up your database so it will track the statistics accurately.

Remember, the statistics shown are only as good as the data entered!

Accounts

# Accounts with Balance	655
# Accounts Overpaid +	5
# Accounts Total =	660
# Delinquent Accounts	53
% Del Accts/Accts w Bal	8.09%

 # Accounts with Balance
The number of accounts with an amount greater than zero for the Total Balance. This is also known as the remaining balance on the patient's contract.

 # Accounts Overpaid +
The number of accounts in which the amount paid on the account is greater than the total balance.

 # Accounts Total =
The total of the number of accounts with a balance plus the number of accounts that have been overpaid.

 # Delinquent Accounts
The number of past due accounts. This is the total number of accounts that have a charge that has aged at least 31 days. (This does not represent accounts with a charge in the 0-30 days column; these accounts are considered past due, but not delinquent).

% Del Accts/Accts w Bal
The percentage of accounts with a delinquent balance. In the above example, 7.26% of the accounts with a balance are delinquent.

Patients

# Active Adults	788
# Active Children	1,134
# Extended Tx	23
# Past Due Recalls	6
# Recall Patients	3
# Active Pts - No Appt or No Recall	69

 # Active Adults
The number of patients 18 years or older who are not checked as Archived/Inactive in the Patient Information window.

 # Active Children
The number of patients 18 or younger who are not checked as Archived/Inactive in the Patient Information window.

 # Extended Tx
The number of patients in which the time elapsed from the treatment start date is greater than the Treatment Plan's Treatment Length Max and in which there is no Treatment End Date in the Patient Information window. This figure also includes patients whose total treatment time elapsed exceeds the Treatment Length Max figure. This includes both active and inactive patients

Tracking Extended Treatment

1. Always enter a ***Tx Start Date*** for Patients!
   • Type the appropriate date in the Status/Notes/Alert tab, center section.
   OR
   • Have topsOrtho automatically enter a patient's Tx Start Date based upon the clinical procedure preferences in the topsOrtho Set Up (select Preferences → Calendar → Clinical Procedure).
2. Always enter the ***Tx Length Max Months.***
   • Type the appropriate number in Patient Information → Clinical → Treatment Plan.
3. Always enter a ***Tx Finish Date*** for Patients!
   • Type the appropriate date in the Status/Notes/Alert tab, center section.
   OR
   • Have topsOrtho automatically enter a patient's Tx Finish Date based upon the clinical procedure preferences in the topsOrtho Set Up (select Preferences → Calendar → Clinical Procedure).

 # Past Due Recalls
The number of recalls manually created by a staff member that do not have scheduled appointments by the recall target date. This does not include recalls created automatically by Patient Flow and the topsOrtho rollover due to a missed appointment.This also does not include recalls that have an appointment scheduled, unless it's scheduled after the Recall Target Date.

 # Recall Patients
The number of patients who have had a recall manually created for them by a staff member, and whose target date is after the beginning of the Practice Monitor report date but before the ending of the Practice Monitor report date. This does not include recalls created automatically by Patient Flow and the topsOrtho rollover due to a missed appointment. This also does not include recalls that have an appointment scheduled.

 # Pts. - No Appt or Recall
The number of patients who do not have an appointment scheduled and do not have a recall. Patients included in this figure are shown in the Active Patients Without Appointment or Recall report.

Recalls Info:
- When scheduling appointments, if a patient has a recall, select the recall that you are scheduling from the popup menu that appears.
- If that recall is in the past and not applicable to that appointment, delete the recall from the **Patient Information Screen -> Appointments/Recalls**. Highlight the recall that you wish to delete and use the keyboard shortcut **Command-Delete.**

Referrals

 # Referrals-In
The number of referrals created for the month-to-date on the Practice Monitor. This is the total number of times a referral was added to the database for the month shown.

# Referrals-In	16
# Dentist Referrals-In	14
% Dentist Referrals-In	87.50%
% Dent Refer-In 3Mon	87.50%

 # Dentist Referrals-In
The number of referrals created specifically by general dentists.

% Dentist Referrals-In
The percentage of total referrals from general dentists.

% Dent Refer-In 3Mon
The percentage of total referrals from general dentists over the last three months, based on the month selected for the Practice Monitor.

Appointments

 # Sched. Appointments
The number of appointments scheduled for the given Practice Monitor month. This total includes any appointment with a status of Pending, Completed or Missed, and an appointment creation date different from the appointment date. This total includes appointments created by rescheduling that were not rescheduled for the same date as the original appointments.

# Sched. Appointments	72
# Failed Appointments	27
# Sched. Emergencies	1
# Unsched. Emergencies	2
# New Patient Exams	1
# Patient Days	2

 # Failed Appointments
The number of appointments created for the Practice Monitor month with status of Missed, and in which the appointment was not created on the same day it was scheduled.

ALSO

The number of appointments created for the designated month with status of Cancelled by Patient or Rescheduled by Patient, and in which the appointment was not created on the same date it was scheduled.

 # Sched. Emergencies
The number of appointments labeled as emergencies scheduled during the month shown on the Practice Monitor. An “emergency” is determined by:

- The Emergency box checked as part of the procedure definition in the Calendar Setup window.
- The checked Emergency box in a patient’s Appointment Information window.

 # Unsched. Emergencies
The total number of appointments labeled as Emergency scheduled during the Practice Monitor month, but placed on the appointment book on the same date as the appointment date. This figure also includes any appointment in which there is an entry in the Broken Appliance field of the patient's Treatment Notes.

 # New Patient Exams
The number of appointments scheduled during the designated month labeled as New Patient Exam. A New Patient Exam is determined by checking Count as New Patient Exam in the Calendar Setup window.

 # Patient Days
The number of days during the Practice Monitor month in which patient appointments were scheduled.

Starts, Finishes, and Case Acceptance

Case Acceptance is determined by patients who completed a New Patient Exam, and those who have a recorded Start Date. These patients may not be one and the same.

% Case Acceptance
The percentage of New Patient Exam appointments for the chosen Practice Monitor period that resulted in Case Acceptance. The Case Acceptance percentage for a single month may not be a true reflection, since many patients complete the New Patient Exam in a system month before the start date month. (See next item for a more accurate reflection of Case Acceptance).

% Accept 3 Mon Avg
The percentage of New Patient Exam appointments for the given Practice Monitor month and the previous two (2) months that resulted in Case Acceptance.

 # New Starts
The number of patients who have recorded a Start Date within the chosen Practice Monitor month.

 # Case Finishes
The number of patients with a Finish Date recorded in the Patient Information window within the chosen Practice Monitor month.

 # Starts/Finishes
The ratio of starts to finishes for the date reported by the Practice Monitor.

Case Totals

# Active Cases	774
# Adult Full Tx Cases	3/152
# Child Full Tx Cases	6/392
# Child Phase II Cases	0/0
# Child Phase I Cases	0/14
# Invisalign Cases	0/0
# Limited Cases	0/29
# SureSmile Cases	0/0
# Surgical Cases	0/0
# TMD Cases	0/0

 # Active Cases
The number of patients with a Start Date recorded, but no Finish Date recorded at the time the Practice Monitor report was created.

 # Adult Full Tx Cases
The first number:
The number of cases in which Tx Type is listed as Comprehensive Treatment and has a start date that reflects the given month on the Practice Monitor. This only includes those age 18.0 years or older at the reporting time.
The second number:
The number of cases where Tx Type is listed as Comprehensive Treatment and patients are 18.0 years of age or older as of the Practice Monitor reporting date.

 # Child Full Tx Cases:
The first number:
The number of cases in which Tx Type is listed as Comprehensive Treatment and has a start date that reflects the given month on the Practice Monitor. This only includes those younger than 18.0 years of age at the reporting time.
The second number:
The number of cases in which the Tx Type is listed as Comprehensive Treatment and the patient is younger than 18.0 years of age as of the Practice Monitor reporting date.

 # Child Phase II Cases

The first number:

The number of cases in which the Tx Type is listed as Phase II and has a start date that reflects the chosen month on the Practice Monitor.This includes those younger than 18.0 years at the reporting time, as well as those without a date of birth recorded in the Patient Information window.

The second number:

The number of cases in which the Tx Type is listed as Phase II and the patient is younger than 18.0 years of age as of the Practice Monitor reporting date. This also includes those without a date of birth recorded in the Patient Information window.

 # Child Phase I Cases

The first number:

The number of cases in which the Tx Type is listed as Phase I and has a start date that reflects the chosen month on the Practice Monitor.This includes those younger than 18.0 at the reporting time, as well as those without a date of birth recorded in the Patient Information window.

The second number:

The total number of cases with Tx Type listed as Phase I and age less than 18.0 years as of the Practice Monitor reporting date. This also includes those who do not have a date of birth recorded in the Patient Information window.

 # Limited Cases

The first number:

The number of cases in which the Tx Type is listed as Limited Treatment and has a start date that reflects the given month on the Practice Monitor.

The second number:

The number of cases in which the Tx Type is listed as Limited Treatment as of the Practice Monitor reporting date.

 # Surgical Cases

The first number:

The number of cases in which the Tx Type is listed as Comprehensive Surgical Orthodontic Treatment and has a start date that reflects the given month on the Practice Monitor

The second number:

The number of cases in which the Tx Type is listed as Comprehensive Surgical Orthodontic Treatment as of the Practice Monitor reporting date.

 # TMD Cases

The first number:

The number of cases in which the Tx Type is listed as TMD Treatment and has a start date that reflects the given month on the Practice Monitor.

The second number:

The number of cases in which the Tx Type is listed as TMD Treatment as of the Practice Monitor reporting date.

Fees

 # Contracts

The number of Active contracts as of the Practice Monitor reporting date. An Active contract is defined as a contract in which the Initial Fee has been charged, but not the final monthly payment or there are undated contract fees that have not been charged.

# Contracts	872
Avg Adult Fee-Full Tx	5,483.33
Avg Child Fee-Full Tx	2,566.66
Avg Child Fee-Phase II	0
Avg Child Fee-Phase I	0
Avg Invisalign Fee	0
Avg Limited Tx Fee	0
Avg SureSmile Tx Fee	0
Avg Surgical Tx Fee	0
Avg TMD Tx Fee	0

Avg Adult Fee-Full Tx

The average fee of contracts that were activated and transactions for Full Adult Tx Fee posted for patients whose Tx Type is listed as Comprehensive Treatment and who are 18.0 years of age or older for the Practice Monitor reporting month.

Avg Child Fee-Full Tx

The average fee of contracts that were activated and transactions of Full Child Tx Fee posted for patients whose Tx Type is listed as Comprehensive Treatment and who are younger than 18.0 years of age for the Practice Monitor reporting month. This also includes those without a date of birth recorded in the Patient Information window and whose Tx Type is listed as Comprehensive Treatment.

Avg Child Fee-Phase II

The average fee of contracts that were activated and transactions of Full Phase II Fee posted for patients whose Tx Type is listed as Phase II and who are younger than 18.0 years of age for the Practice Monitor reporting month. This also includes anyone without a date of birth recorded in the Patient Information window and whose Tx Type is listed as Phase II.

Avg Child Fee-Phase I
The average fee charged of contracts that were activated and transactions of Full Phase I Fee posted for patients whose Tx Type is listed as Phase I and who are younger than 18.0 years of age for the Practice Monitor reporting month. This also includes anyone without a date of birth recorded in the Patient Information window and whose Tx Type is listed as Phase I.

Avg Invisalign Fee
The average fee charged of contracts that were activated and transactions, such as Full Adult Tx Fee, posted for patients whose Tx Type is listed as Invisalign Therapy for the Practice Monitor reporting month.

Avg Limited Tx Fee
The average fee charged of contracts that were activated and transactions of Full Adult Tx Fee or Full Child Tx Fee posted for patients whose Tx Type is listed as Limited Treatment for the Practice Monitor reporting month.

Avg. SureSmile Tx Fee
The average fee charged of contracts that were activated and transactions, such as Full Adult Tx Fee, posted for those patients whose Tx Type is listed as SureSmile Treatment for the Practice Monitor reporting month.

Avg Surgical Tx Fee
The average fee charged of contracts that were activated and transactions of Full Surgical Tx Fee posted for those patients whose Tx Type is listed as Comprehensive Surgical Orthodontic Treatment for the Practice Monitor reporting month.

Avg TMD Fee
The average fee charged of contracts that were activated and transactions of Full TMD Fee posted for those patients with Tx Type TMD Treatment for the Practice Monitor reporting month.

Financials

$ Prev Accts Rec
The total reported as Accounts Receivable for the month before the Practice Monitor reporting date.

$ Production +
The total reported as Production for the Practice Monitor reporting month. Production is the total of any contract that was activated during the Practice Monitor Reporting month plus any non-voided fees that were charged outside of the contract.

$ Prev Accts Rec	327,339.62
$ Production +	148,185.00
$ Collections -	49,421.54
$ [+] Contract Adj +	7,498.00
$ [-] Contract Adj -	125.00
$ [+] Adjustments +	237.50
$ [-] Adjustments -	1,550,580.15
$ Accounts Rec =	(1,116,866.57
% Collection/Production	33.35%
% Accts Rec/Production	-753.70%

$ Collections -
The total reported as Collections for the Practice Monitor reporting month.
Collections are the total dollar amount of payments posted to topsOrtho.

$ [+] Contract Adj +
The total reported as [+] Contract Adjustments for the Practice Monitor reporting month.
[+] Contract Adj + is any change in a contract schedule that increases a patient's contract total.

$ [-] Contract Adj -
The total reported as [-] Contract Adjustments for the Practice Monitor reporting month.
[-] Contract Adj - is any change in a contract schedule that decreases a patient's contract total.

$ [+] Adjustments +
The total reported as [+] Adjustments for the Practice Monitor reporting month.
[+] Adjustment + is any transaction that increases a patient's total balance and is added under the "New Transaction" function.

$ [-] Adjustments -
The total reported as [-] Adjustments for the Practice Monitor reporting month.
[-] Adjustment is any transaction that decreases a patient's total balance and is added as a "New Transaction" function.

$ Accounts Rec =
The total reported as Accounts Receivable for the Practice Monitor reporting month.
Accounts Receivable is the total of Expected Insurance plus Future Due, plus Past Due, minus Pre-paid amounts.

% Collection/Production
The percentage of the Production total that was actually collected for the Practice Monitor reporting month.

% Acct Rec/Production
The percentage of the Production total that is the Accounts Receivable for the Practice Monitor reporting month.

Accounts Receivable

$ Accounts Rec
The total reported as Accounts Receivable for the Practice Monitor reporting month. Accounts Receivable is the total of Expected Insurance plus Future Due, plus Past Due, minus Pre-paid amounts.

$ Accounts Rec	(1,116,866.57
$ Expected Ins	182,567.98
$ Future Due	718,577.41
$ Pre-Paid	(3,012.25)
$ Current & Past Due	55,544.29
$ 0 - 30	9,139.72
$ 30 - 60	8,736.80
$ 60 - 90	2,485.50
$ 90+	35,182.27

$ Expected Ins
The total expected to be paid by insurance companies for the Practice Monitor reporting month. This number is reflected in the Expected Insurance amount in each patient's contract.

$ Future Due
The total yet to be charged for every patient contract for the Practice Monitor reporting month.

$ Pre-Paid
The total that has been paid ahead on patient contracts, resulting in a Due Now credit for the Practice Monitor reporting month. This is only applicable to those contracts that still contain a Contract Total.

$ Current & Past Due
The total considered Due Now, both currently due and past due 0-30, 30-60, 60-90, and 90+ days for the Practice Monitor reporting month. This is reflected in the patient's Due Now field of his contract snapshot.

$ 0 - 30
The total considered Due Now that is Past Due between 0 and 30 days for the Practice Monitor reporting month.
$ 30 - 60
The total considered Due Now that is Past Due between 30 and 60 days for the Practice Monitor reporting month.

$ 60 - 90
The total considered Due Now that is Past Due between 60 and 90 days for the Practice Monitor reporting month.
$ 90 +
The total considered Due Now that is Past Due 90 days or more for the Practice Monitor reporting month.

Charges

$ Charges
The total fees for the Practice Monitor reporting period. Fees include Scheduled Contract Charges, Late Fees, Initial Fees, and all other transactions charged through the New Transaction window.

$ Charges	64,817.71
$ Charges 6 Mon Avg	142,686.68
$ Collections	49,421.54
% Collection/Charges	76.25%
% CurAccRec/Charges	-1723.09%

$ Charges 6 Mon Avg
The average of the total fees from the current Practice Monitor month and the five previous months. Fees include Scheduled Contract Charges, Late Fees, Initial Fees, and all other transactions charged through the New Transaction window.

$ Collections
The total received and posted as payments to patient accounts for the Practice Monitor reporting period.

% Collection/Charges
The percentage of fees charged to all patient accounts that were actually collected and posted as payments for the Practice Monitor reporting period.

% CurAccRec/Charges
The percentage of fees charged to patient accounts that are the Current Account Receivable total for the Practice Monitor reporting period.

Summary

In this lesson, you should feel confident with:
- Understanding the Practice Monitor

Lesson 24 Staff and Security Setup

Lesson Twenty-Four Overview

This lesson focuses on creating system encryption and entering employees and their permissions.

Objectives:

To become familiar with the system security, you will:

24A Learn about System Encryption
How to secure your system and your patients' credit/debit cards.

24B Enter Employees and their Permissions.
Create your staff and assign privileges for viewing and entering information in topsOrtho.

24A Creating System Encryption

If you decide to use the Auto-Payment plan in topsOrtho and want to store credit card information in the system, you must create security encryption to protect that information. topsOrtho has two levels of password security that you'll set up: System Encryption and the Workstation Access Key.

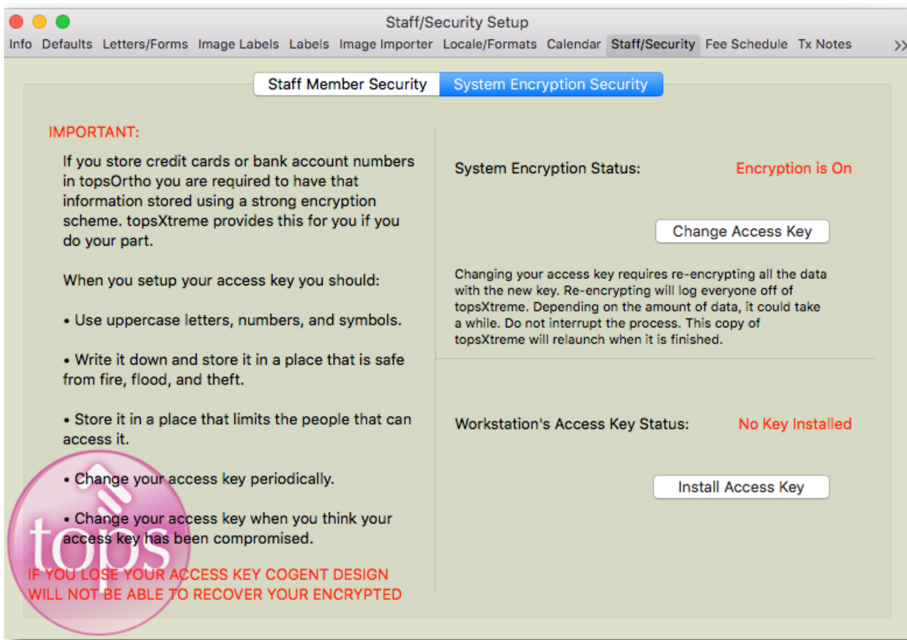


Figure 24-1: *System Encryption Security*

As indicated in the above figure, when setting up encryption:

- Use uppercase letters, numbers, and symbols
- Write it down and store it in a place that is safe from fire, flood, and theft
- Store it in a place that limits the people that can access it
- Change your access key periodically
- Change your access key when you think it has been compromised

If you lose your access key, tops Software cannot recover your encrypted data!

Add System Encryption Security

1. Click topsOrtho from the menu bar and chose Practice Setup.
2. Enter your password.
3. Click Staff/Security and enter your password.
4. Click System Encryption Security.
5. Click Change Access Key.
6. Enter a 16-character unique character/number/case-sensitive encryption code.
7. Click OK. Store your code in a safe place!

Add a Workstation Access Key

In order to view a previously entered credit/debit card number, you must add a Workstation Access Key. The workstation access key is usable only for the specific workstation (computer) on which you install the key. It must be the same as the System Encryption Key.

1. Click Install Access Key.

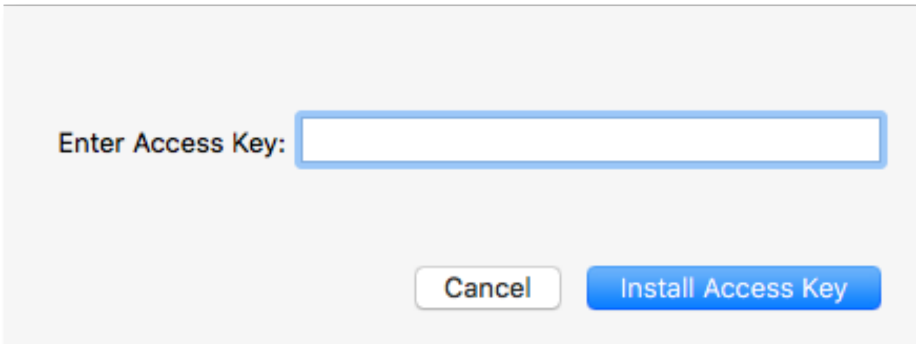


Figure 24-2: *Workstation Access Key*

2. Enter the same 16-character unique character/number/case-sensitive code that you established for System Encryption.
3. Click Install Access Key.

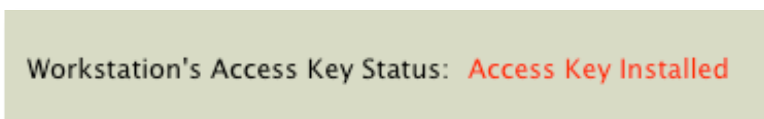


Figure 24-3: *Access Key Installed*

Once security is set up–both system encryption and workstation access–you are ready to store account holder credit card information.

24B Employees and Permissions
In order for your employees to log into topsOrtho, you'll want to create individual passwords. These passwords will authorize specific people to perform specific tasks. You can password-protect almost all of the features in topsOrtho.

Add Employees and Assign Permissions
1. Click topsOrtho from the menu bar.
2. Enter your password.
3. Click Staff/Security.
4. Enter your password.

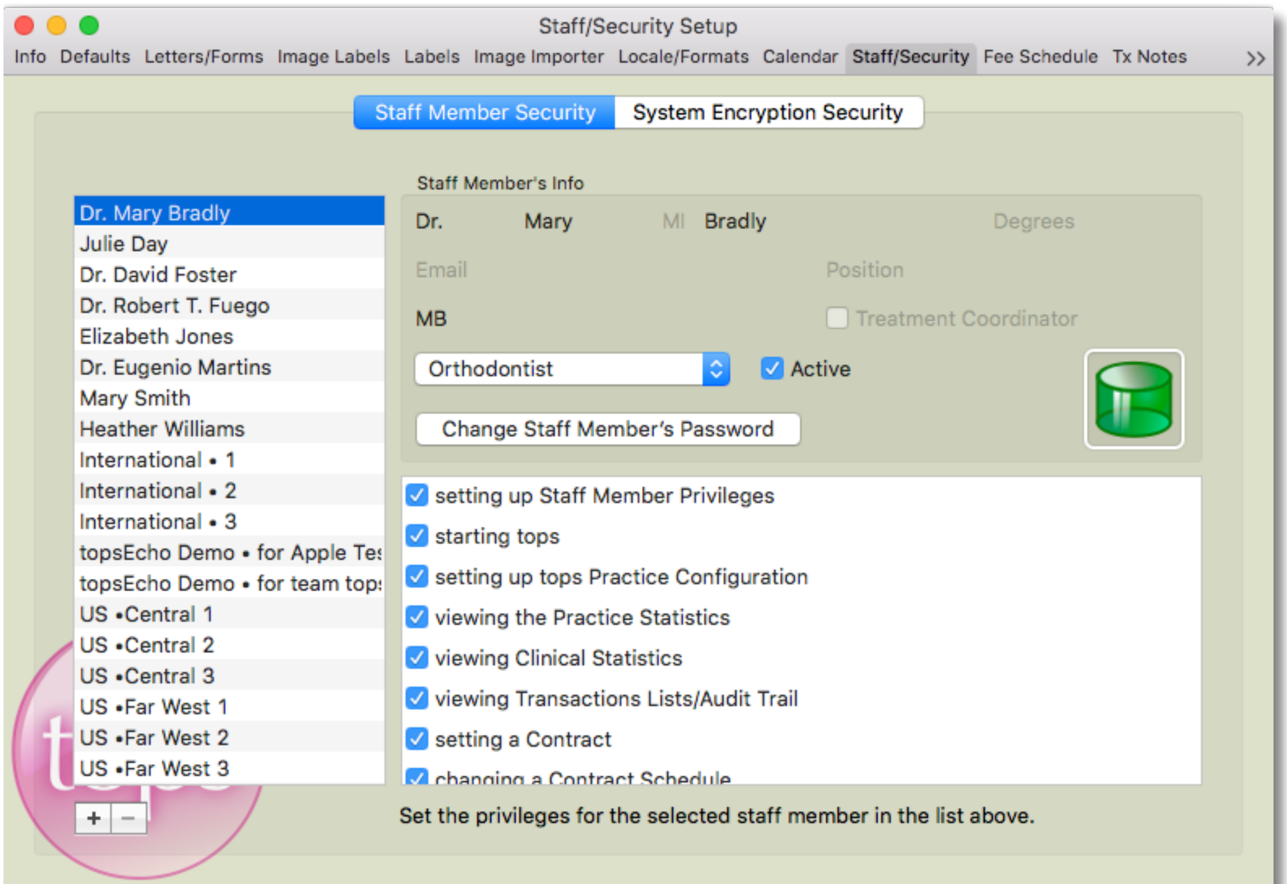


Figure 24-4: *Staff Member Security*

5. Click the + (plus) symbol to create an employee's name.

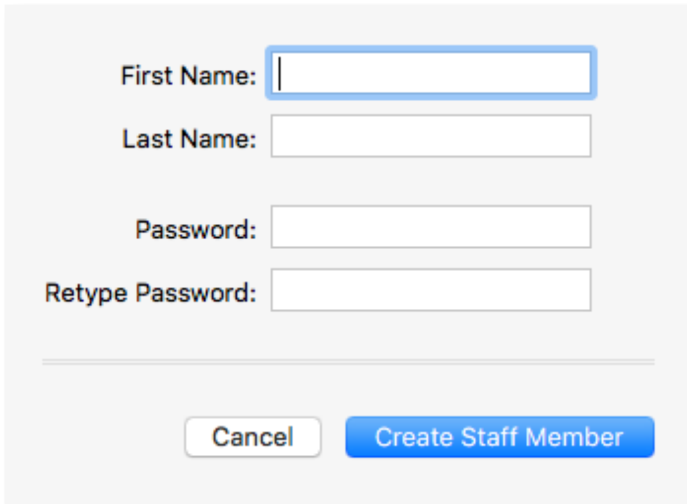


Figure 24-5: *Create Individual*

6. Enter in the appropriate information and assign a unique password. The password **must be at least five characters** in length.
7. Click Create Staff Member.
8. Click the individual's name from the list and assign permissions according to job position.

Change a Password
1. Click on an individual's name.
2. Click Change Staff Member's Password.
3. Assign a new password.
4. Click Change Password.

You cannot delete someone once you've added them. You can only make them "inactive" by removing the check to the left of active.

Summary

In this lesson, you should feel confident with:
- Setting up system encryption
- Setting up employees and their permissions

Lesson 25 topsOrtho and Your Accountant

Lesson Twenty-Five Overview

This lesson will help you to manage your fees and collections and explain where you may find the information required by your accountant

Objectives:

To become familiar with the system security, you will:

25A Managing Charges, Collections, and Adjustments
How to secure your system and your patients' credit/debit cards.

25A Managing Charges, Collections and Adjustments

topsOrtho provides you and your accountant with all the necessary information on Production, Collections, and Account Adjustments–the money on which you pay taxes.

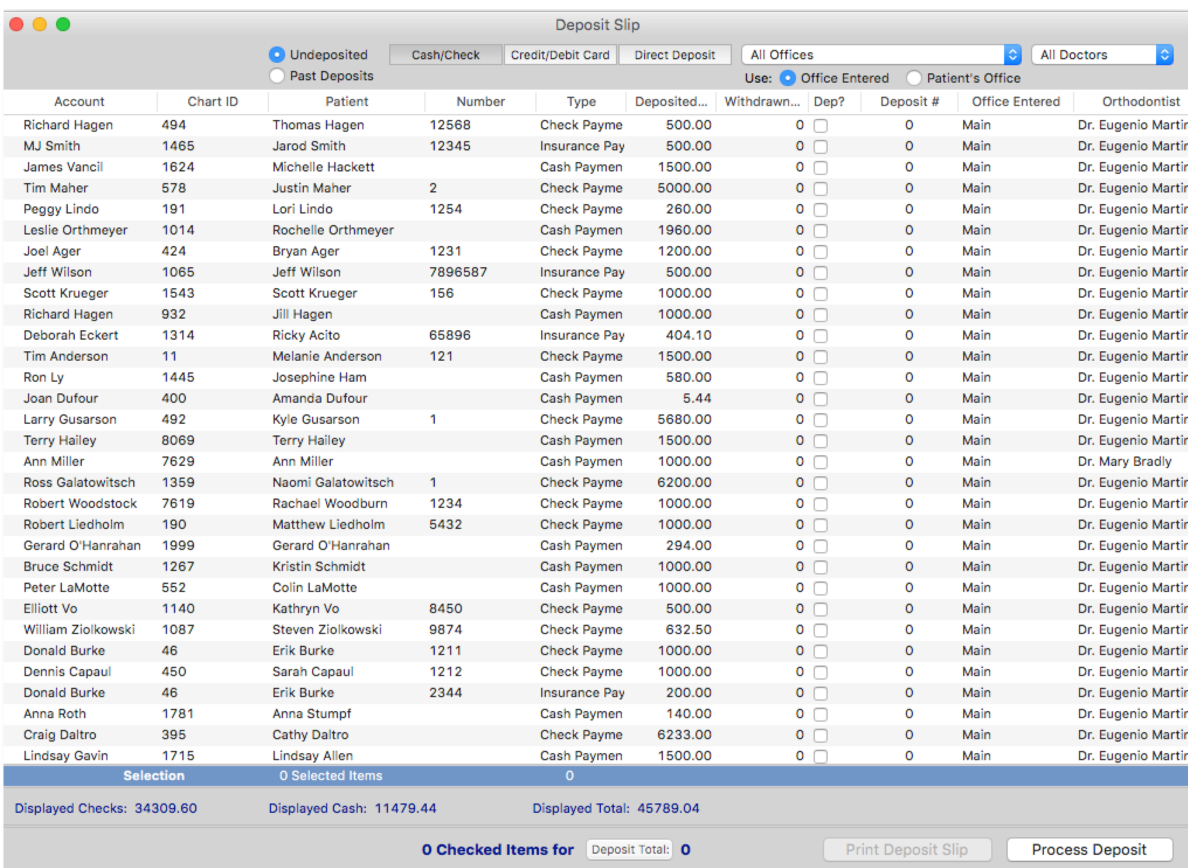
Sales tax is paid on fees that are **charged**. *Income tax* is based on payments **collected**. There are no taxes charged on Production numbers, which are for services we expect to deliver but have not yet charged, such as future scheduled contracts.

Managing Funds Received (Collected)

The list we will use for managing funds received is the **Deposit Slip**. You can find the deposit slip in the pull down menu for Matrix.

As you know, each time you create a transaction in tops for accepting payment, an entry is made on the deposit slip. You are able to manage these deposits in several ways.

Cash only	Credit Card only	Direct Dep Bank Draft only
Check only	Debit Card only	Direct Dep Insurance Pay
Cash and Check	Credit and Debit Card	Direct Dep Bank Draft & Ins. Pay



Account	Chart ID	Patient	Number	Type	Deposited...	Withdrawn...	Dep?	Deposit #	Office Entered	Orthodontist
Richard Hagen	494	Thomas Hagen	12568	Check Payme	500.00	0		0	Main	Dr. Eugenio Martin
MJ Smith	1465	Jarod Smith	12345	Insurance Pay	500.00	0		0	Main	Dr. Eugenio Martin
James Vancil	1624	Michelle Hackett		Cash Paymen	1500.00	0		0	Main	Dr. Eugenio Martin
Tim Maher	578	Justin Maher	2	Check Payme	5000.00	0		0	Main	Dr. Eugenio Martin
Peggy Lindo	191	Lori Lindo	1254	Check Payme	260.00	0		0	Main	Dr. Eugenio Martin
Leslie Orthmeyer	1014	Rochelle Orthmeyer		Cash Paymen	1960.00	0		0	Main	Dr. Eugenio Martin
Joel Ager	424	Bryan Ager	1231	Check Payme	1200.00	0		0	Main	Dr. Eugenio Martin
Jeff Wilson	1065	Jeff Wilson	7896587	Insurance Pay	500.00	0		0	Main	Dr. Eugenio Martin
Scott Krueger	1543	Scott Krueger	156	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martin
Richard Hagen	932	Jill Hagen		Cash Paymen	1000.00	0		0	Main	Dr. Eugenio Martin
Deborah Eckert	1314	Ricky Acito	65896	Insurance Pay	404.10	0		0	Main	Dr. Eugenio Martin
Tim Anderson	11	Melanie Anderson	121	Check Payme	1500.00	0		0	Main	Dr. Eugenio Martin
Ron Ly	1445	Josephine Ham		Cash Paymen	580.00	0		0	Main	Dr. Eugenio Martin
Joan Dufour	400	Amanda Dufour		Cash Paymen	5.44	0		0	Main	Dr. Eugenio Martin
Larry Gusarson	492	Kyle Gusarson	1	Check Payme	5680.00	0		0	Main	Dr. Eugenio Martin
Terry Hailey	8069	Terry Hailey		Cash Paymen	1500.00	0		0	Main	Dr. Eugenio Martin
Ann Miller	7629	Ann Miller		Cash Paymen	1000.00	0		0	Main	Dr. Mary Bradly
Ross Galatowitsch	1359	Naomi Galatowitsch	1	Check Payme	6200.00	0		0	Main	Dr. Eugenio Martin
Robert Woodstock	7619	Rachael Woodburn	1234	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martin
Robert Liedholm	190	Matthew Liedholm	5432	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martin
Gerard O'Hanrahan	1999	Gerard O'Hanrahan		Cash Paymen	294.00	0		0	Main	Dr. Eugenio Martin
Bruce Schmidt	1267	Kristin Schmidt		Cash Paymen	1000.00	0		0	Main	Dr. Eugenio Martin
Peter LaMotte	552	Colin LaMotte		Cash Paymen	1000.00	0		0	Main	Dr. Eugenio Martin
Elliott Vo	1140	Kathryn Vo	8450	Check Payme	500.00	0		0	Main	Dr. Eugenio Martin
William Ziolkowski	1087	Steven Ziolkowski	9874	Check Payme	632.50	0		0	Main	Dr. Eugenio Martin
Donald Burke	46	Erik Burke	1211	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martin
Dennis Capaul	450	Sarah Capaul	1212	Check Payme	1000.00	0		0	Main	Dr. Eugenio Martin
Donald Burke	46	Erik Burke	2344	Insurance Pay	200.00	0		0	Main	Dr. Eugenio Martin
Anna Roth	1781	Anna Stumpf		Cash Paymen	140.00	0		0	Main	Dr. Eugenio Martin
Craig Daltro	395	Cathy Daltro		Check Payme	6233.00	0		0	Main	Dr. Eugenio Martin
Lindsay Gavin	1715	Lindsay Allen		Cash Paymen	1500.00	0		0	Main	Dr. Eugenio Martin

Figure 25-1: *Deposit Slip*

Before creating deposits for your practice, it's a good idea to check with your accountant/bookkeeper on his needs for bank reconciliation. Once you know his exact needs, you can create deposits in topsOrtho accordingly. If you have multiple practices in different cities, you may need to create deposits that are practice-specific, since different cities have different tax rates. Income Tax is paid on deposits. You can choose to make deposits based on the patient's office or the office that entered the transaction

Separate Offices
In order for you to create deposits for separate offices, you must first select the office from the drop down list. Below the office selection box, you will need to choose to sort the deposit by the office that entered the transaction or the patient's office. Then proceed to create the deposits as required.

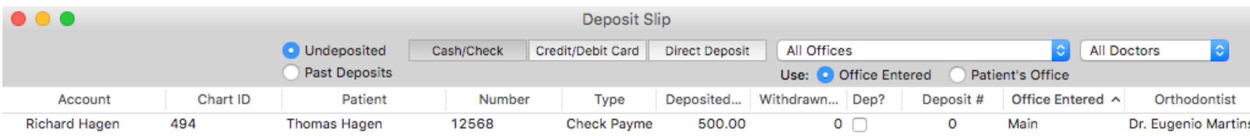


Figure 25-2: *Select Appropriate Office*

Cash/Check Deposits
Create the deposit in the manner instructed by your accountant/bookkeeper, either Cash Only, Check Only or Combined.

Credit/Debit Deposits

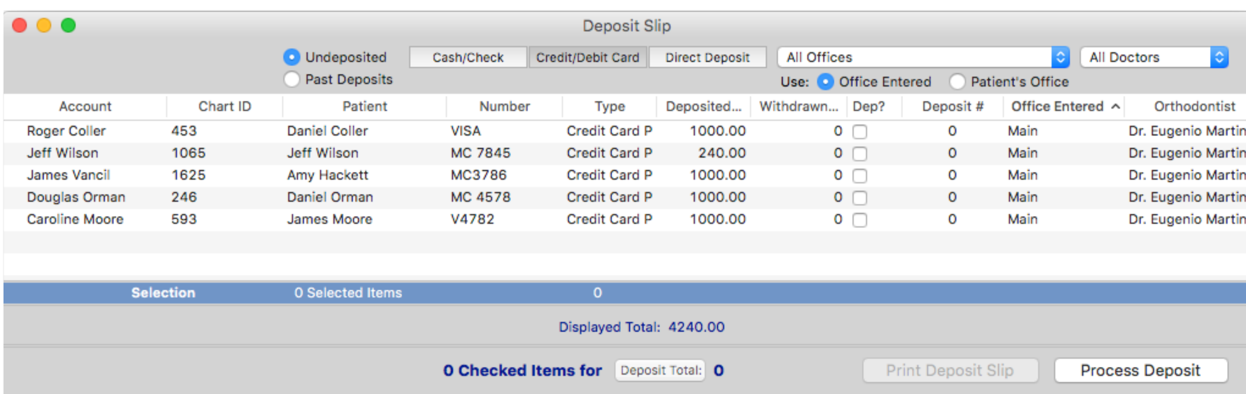
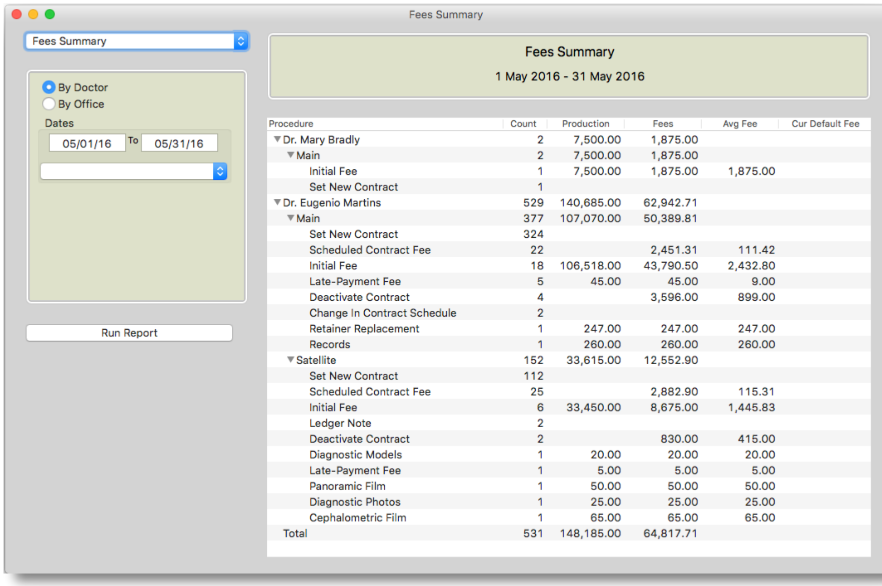


Figure 25-3: *Credit/Debit Card*

If you receive a merchant statement at the end of the month, the Accountant/Bookkeeper will need to see that batch reports at the end of the day match the daily deposit slips. These daily batch reports should equal the monthly merchant statement. If you are using more than one company to process credit cards, you may wish to sort by credit card type using the number column in the above illustration and create separate deposits.

Managing Charges

There are two reports that we will use in managing charges, **Fee Summary** and the **Fee by Month Summary** located in the pull down menu of Reports.



Fees Summary

Fees Summary

By Doctor
By Office
Dates
05/01/16 To 05/31/16

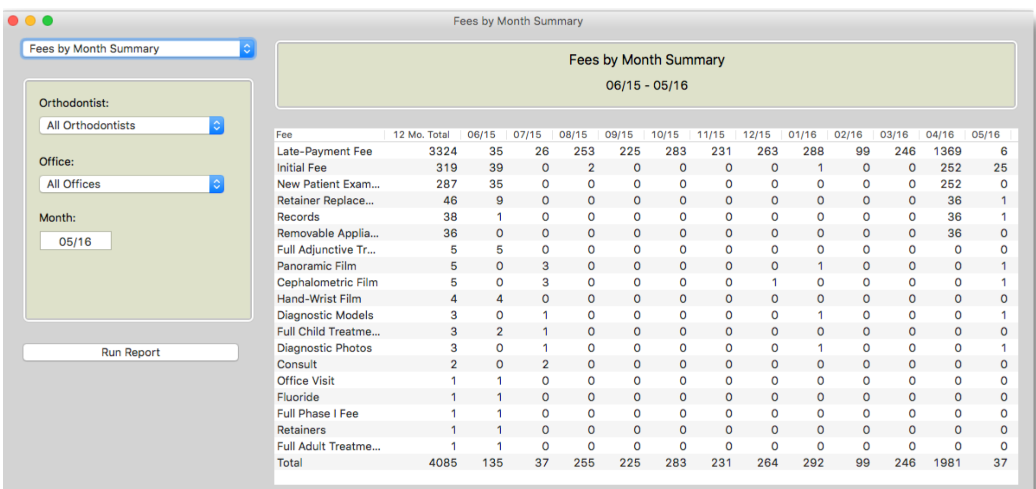
Run Report

Fees Summary
1 May 2016 - 31 May 2016

Procedure	Count	Production	Fees	Avg Fee	Cur Default Fee
▼Dr. Mary Bradly	2	7,500.00	1,875.00		
▼Main	2	7,500.00	1,875.00		
Initial Fee	1	7,500.00	1,875.00	1,875.00	
Set New Contract	1				
▼Dr. Eugenio Martins	529	140,685.00	62,942.71		
▼Main	377	107,070.00	50,389.81		
Set New Contract	324				
Scheduled Contract Fee	22		2,451.31	111.42	
Initial Fee	18	106,518.00	43,790.50	2,432.80	
Late-Payment Fee	5	45.00	45.00	9.00	
Deactivate Contract	4		3,596.00	899.00	
Change In Contract Schedule	2				
Retainer Replacement	1	247.00	247.00	247.00	
Records	1	260.00	260.00	260.00	
▼Satellite	152	33,615.00	12,552.90		
Set New Contract	112				
Scheduled Contract Fee	25		2,882.90	115.31	
Initial Fee	6	33,450.00	8,675.00	1,445.83	
Ledger Note	2				
Deactivate Contract	2		830.00	415.00	
Diagnostic Models	1	20.00	20.00	20.00	
Late-Payment Fee	1	5.00	5.00	5.00	
Panoramic Film	1	50.00	50.00	50.00	
Diagnostic Photos	1	25.00	25.00	25.00	
Cephalometric Film	1	65.00	65.00	65.00	
Total	531	148,185.00	64,817.71		

Figure 25-4: *Fee Summary Report*

The Fee Summary shows all fees charged for a specific day or date range, divided by Orthodontic and Administrative fee type. Sales Tax is paid on these fees.



Fees by Month Summary

Fees by Month Summary

Orthodontist:
All Orthodontists
Office:
All Offices
Month:
05/16

Run Report

Fees by Month Summary
06/15 - 05/16

Fee	12 Mo. Total	06/15	07/15	08/15	09/15	10/15	11/15	12/15	01/16	02/16	03/16	04/16	05/16
Late-Payment Fee	3324	35	26	253	225	283	231	263	288	99	246	1369	6
Initial Fee	319	39	0	2	0	0	0	0	1	0	0	252	25
New Patient Exam...	287	35	0	0	0	0	0	0	0	0	0	252	0
Retainer Replace...	46	9	0	0	0	0	0	0	0	0	0	36	1
Records	38	1	0	0	0	0	0	0	0	0	0	36	1
Removable Applia...	36	0	0	0	0	0	0	0	0	0	0	36	0
Full Adjunctive Tr...	5	5	0	0	0	0	0	0	0	0	0	0	0
Panoramic Film	5	0	3	0	0	0	0	0	1	0	0	0	1
Cephalometric Film	5	0	3	0	0	0	0	1	0	0	0	0	1
Hand-Wrist Film	4	4	0	0	0	0	0	0	0	0	0	0	0
Diagnostic Models	3	0	1	0	0	0	0	0	1	0	0	0	1
Full Child Treatme...	3	2	1	0	0	0	0	0	0	0	0	0	0
Diagnostic Photos	3	0	1	0	0	0	0	0	1	0	0	0	1
Consult	2	0	2	0	0	0	0	0	0	0	0	0	0
Office Visit	1	1	0	0	0	0	0	0	0	0	0	0	0
Fluoride	1	1	0	0	0	0	0	0	0	0	0	0	0
Full Phase I Fee	1	1	0	0	0	0	0	0	0	0	0	0	0
Retainers	1	1	0	0	0	0	0	0	0	0	0	0	0
Full Adult Treatme...	1	1	0	0	0	0	0	0	0	0	0	0	0
Total	4085	135	37	255	225	283	231	264	292	99	246	1981	37

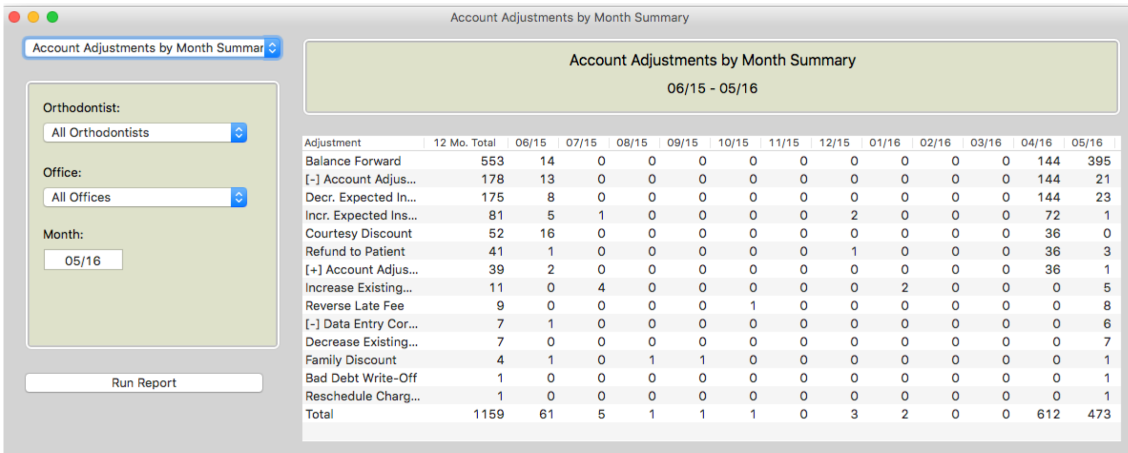
Figure 25-5: *Fees by Month Summary Report*

The Fees by Month Summary displays only fees that were charged during a specified 12-month period. A fee will not be listed on the report if it was not charged during that timeframe.

Managing Account Adjustments

Account adjustments are managed with two lists found in the Matrix–**Transactions Audit Trail** and **Receipts**–and one report, the **Account Adjustments by Month Summary**.

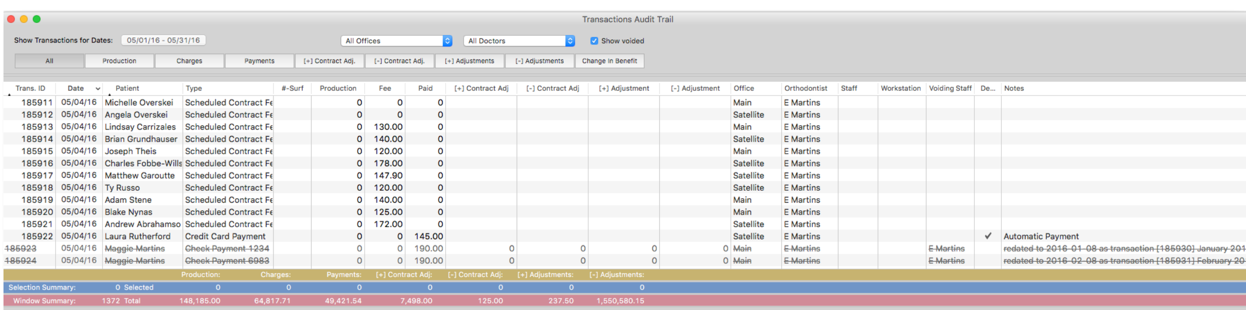
The Account Adjustments by Month Summary shows all account adjustments for a 12-month period. This report only displays adjustments that were taken during the specified 12 months. It will not list an adjustment if it was not used during that time.



Adjustment	12 Mo. Total	06/15	07/15	08/15	09/15	10/15	11/15	12/15	01/16	02/16	03/16	04/16	05/16
Balance Forward	553	14	0	0	0	0	0	0	0	0	0	144	395
[-] Account Adjus...	178	13	0	0	0	0	0	0	0	0	0	144	21
Decr. Expected In...	175	8	0	0	0	0	0	0	0	0	0	144	23
Incr. Expected Ins...	81	5	1	0	0	0	0	2	0	0	0	72	1
Courtesy Discount	52	16	0	0	0	0	0	0	0	0	0	36	0
Refund to Patient	41	1	0	0	0	0	0	1	0	0	0	36	3
[+] Account Adjus...	39	2	0	0	0	0	0	0	0	0	0	36	1
Increase Existing...	11	0	4	0	0	0	0	0	2	0	0	0	5
Reverse Late Fee	9	0	0	0	0	1	0	0	0	0	0	0	8
[-] Data Entry Cor...	7	1	0	0	0	0	0	0	0	0	0	0	6
Decrease Existing...	7	0	0	0	0	0	0	0	0	0	0	0	7
Family Discount	4	1	0	1	1	0	0	0	0	0	0	0	1
Bad Debt Write-Off	1	0	0	0	0	0	0	0	0	0	0	0	1
Reschedule Charg...	1	0	0	0	0	0	0	0	0	0	0	0	1
Total	1159	61	5	1	1	1	0	3	2	0	0	612	473

Figure 25-6: *Account Adjustments by Month Summary*

If you want to see all transactions for a specific timeframe, the Transaction Audit Trail displays all transactions performed in tops. You can specify a timeframe and also filter the list by adjustment type. Voided transactions can be displayed by checking the box to the left of the Show Voided item.



Trans. ID	Date	Patient	Type	#-Surf	Production	Fee	Paid	[+] Contract Adj	[-] Contract Adj	[+] Adjustment	[-] Adjustment	Office	Orthodontist	Staff	Workstation	Voiding Staff	De...	Notes
185911	05/04/16	Michelle Overskei	Scheduled Contract Fe		0	0	0					Main	E Martins					
185912	05/04/16	Angela Overskei	Scheduled Contract Fe		0	0	0					Satellite	E Martins					
185913	05/04/16	Lindsay Carrizales	Scheduled Contract Fe		0	130.00	0					Main	E Martins					
185914	05/04/16	Brian Grundhauser	Scheduled Contract Fe		0	140.00	0					Satellite	E Martins					
185915	05/04/16	Joseph Theis	Scheduled Contract Fe		0	120.00	0					Main	E Martins					
185916	05/04/16	Charles Fobbe-Wills	Scheduled Contract Fe		0	178.00	0					Satellite	E Martins					
185917	05/04/16	Matthew Garoutte	Scheduled Contract Fe		0	147.90	0					Satellite	E Martins					
185918	05/04/16	Ty Russo	Scheduled Contract Fe		0	120.00	0					Satellite	E Martins					
185919	05/04/16	Adam Stene	Scheduled Contract Fe		0	140.00	0					Main	E Martins					
185920	05/04/16	Blake Nynas	Scheduled Contract Fe		0	125.00	0					Main	E Martins					
185921	05/04/16	Andrew Abrahamso	Scheduled Contract Fe		0	172.00	0					Satellite	E Martins					
185922	05/04/16	Laura Rutherford	Credit Card Payment		0	0	145.00					Satellite	E Martins				✓	Automatic Payment
~~185923~~	05/04/16	~~Maggie Martins~~	~~Check Payment 1234~~		0	0	190.00	0	0	0	0	~~Main~~	~~E Martins~~			~~E Martins~~		~~redated to 2016-01-08 as transaction [185930] January 2010~~
~~185924~~	05/04/16	~~Maggie Martins~~	~~Check Payment 6983~~		0	0	190.00	0	0	0	0	~~Main~~	~~E Martins~~			~~E Martins~~		~~redated to 2016-02-08 as transaction [185931] February 201~~

		Production:	Charges:	Payments:	[+] Contract Adj:	[-] Contract Adj:	[+] Adjustments:	[-] Adjustments:
Selection Summary:	0 Selected	0	0	0	0	0	0	0
Window Summary:	1372 Total	148,185.00	64,817.71	49,421.54	7,498.00	125.00	237.50	1,550,580.15

Figure 25-7: *Transactions Audit Trail*

If you or your accountant/bookkeeper has a question about a specific transaction or adjustment, you can open the patient's ledger for verification. Remember, notes about individual transactions are displayed on the last column at the right.

You can verify voided or date change transactions with the Invoices/Receipts matrix. When creating, you can identify which transactions were voided and which had a date change.

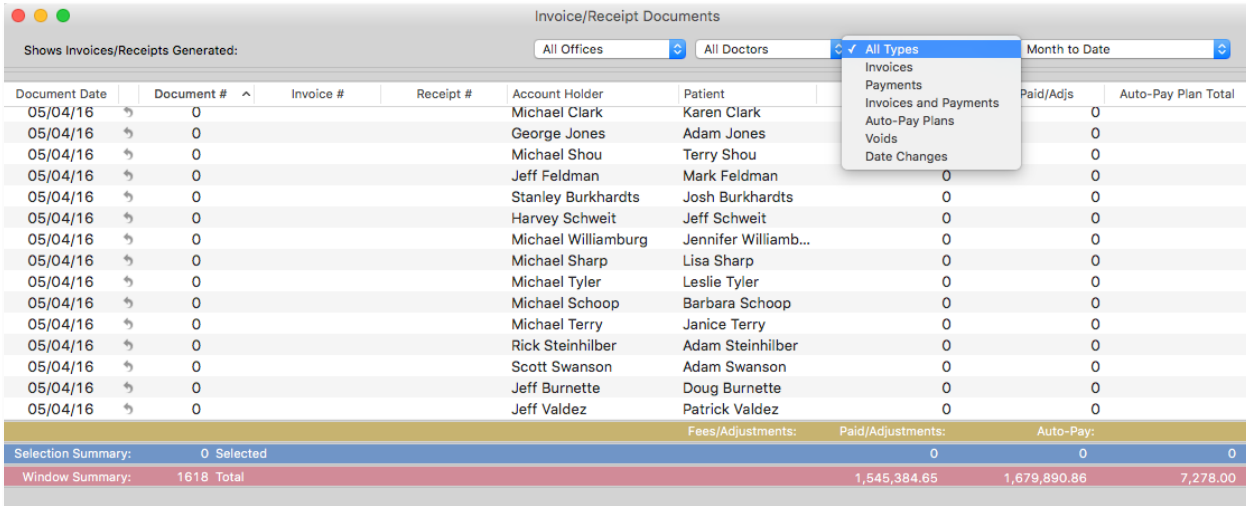


Figure 25-8: *Invoices/Receipts*

When verifying, be sure to specify what type you would like displayed from the drop-down box.

Putting it All Together

The **Production/Collections** report shows gross production and collection figures for a specified timeframe. To ensure correct tax reporting, give your accountant or bookkeeper the correct net figures. Below are the calculations you'll want to use.

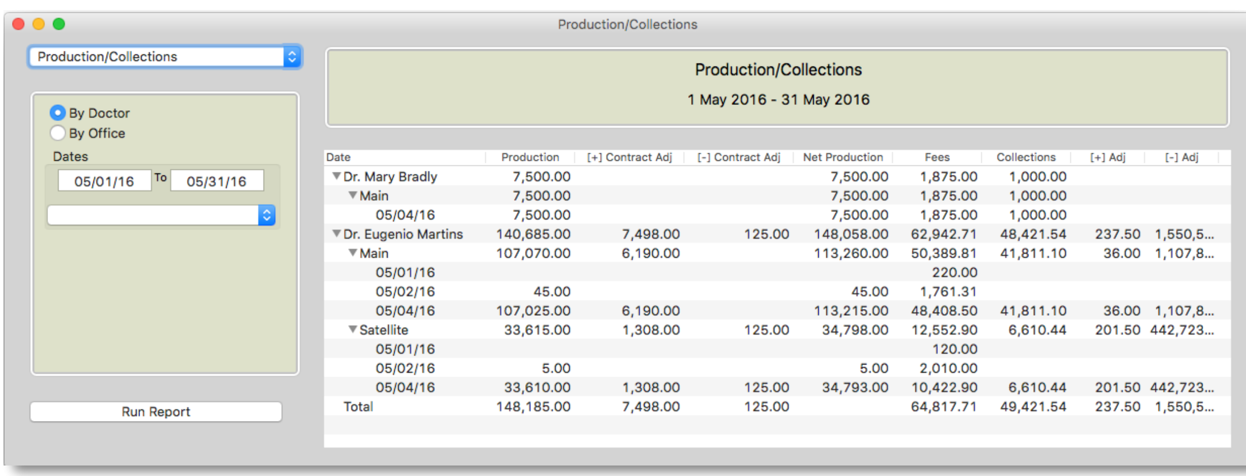


Figure 25-9: *Production/Collections*

Net Production equals	Production plus [+] Contract Adjustments minus [-] Contract Adjustments
Net Fees equals	Fees minus [-] Adjustments
Net Collections equals	Collections plus [+] Adjustments

Above example:

Production	73,065.00		Fees	38,625.54	
Plus	957.00	[+] Contract Adj	Minus	10,995.00	[-] Adj
Minus	450.00	[-] Contract Adj			
Net Production	73,572.00		Net Fees	27,630.54	

Collections	14,734.50	
Plus	0.00	[+] Adj
Net Collections	14,734.50	

If your production figures seem to be incorrect, look for **voided** or **date change** receipts or **rescheduled charged contract fees** from the Transactions of Type This Month report.

This should help both you and your account/bookkeeper calculate taxes on the correct numbers.

Summary

In this lesson, you should feel confident with:

- Understanding and utilizing the Practice Monitor according to your practice needs

Lesson 26 Outgoing Mail Server Setup

Lesson Twenty-Six Overview

This lesson will help you to setup your outgoing mail server for emailing statements and emailing various other documents and letters directly from tops.

Objectives:

To become familiar with the system security, you will:

26A Setting up the Outgoing Mail Server
How to set up the mail server.

26B Emailing from tops
How to email from topsOrtho.

26A Setting up the Outgoing Mail Server

1. At the top of the screen, from the topsOrtho menu on the menu bar, select Practice Setup…
2. From the menu that comes up first in Practice Setup, click the menu to the right of Outgoing Mail Server:. and select Edit SMTP Server List…

   The SMTP Server is the outgoing mail server you use to send emails from your office through your office email account. The information is provided by your ISP (Internet Service Provider). The outgoing mail server could also be provided by a third party like Sesame or TeleVox
3. Below the table on the setup sheet, click the plus (+) button.

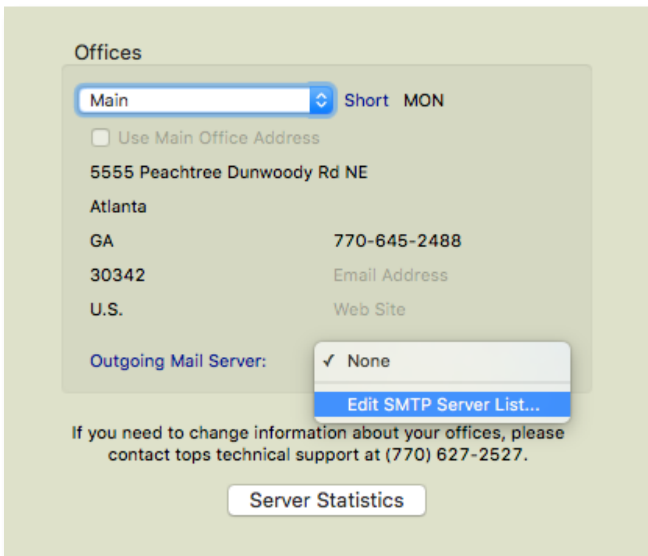


Figure 26-1: *Practice Setup: Outgoing Mail Server*

4. Enter the outgoing mail server's Server Name (usually in the format of smtp.an_isp_company_name.com), Port (587 works fine most of the time), User Name (usually your office email address with your ISP) and Password (your office email account password). Also check the appropriate security and authentication options. If you do not know all of the information, please contact your office email provider. Using the wrong settings will cause your emails from topsOrtho not to be sent.

   If your Mail.app is set up to use your office email account, from the Mail menu, open Preferences... Then click the Accounts tool at the top of the window. The Account Information tab has an Outgoing Mail Server pop-up menu that you can use to find the needed SMTP information. Also, most ISPs and email providers have their outgoing mail server information on their website under Help/Support.

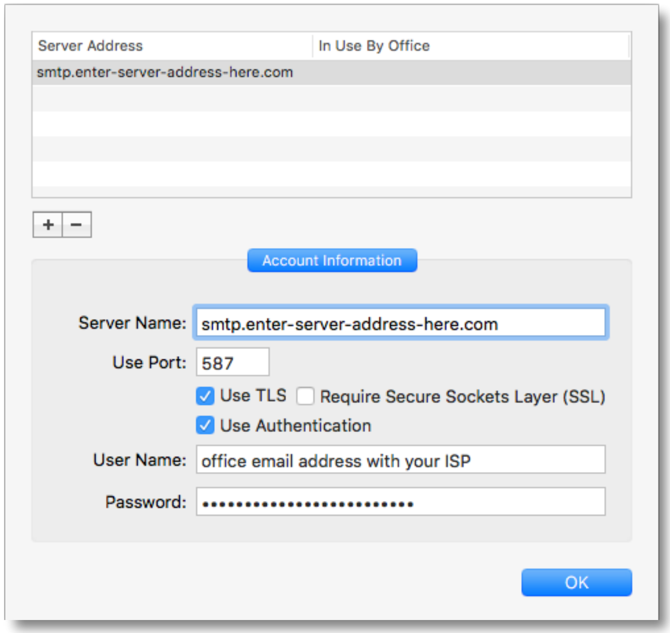


Figure 26-2: *Edit STMP Server*

5. When finished, click OK
6. To test the mail server set up, create a letter and email it to a staff member who is set up as a Patient or Referrer in topsOrtho (make sure they have an email address on file). Use the shortcut Command + L, select a Template, Patient and Addressee.

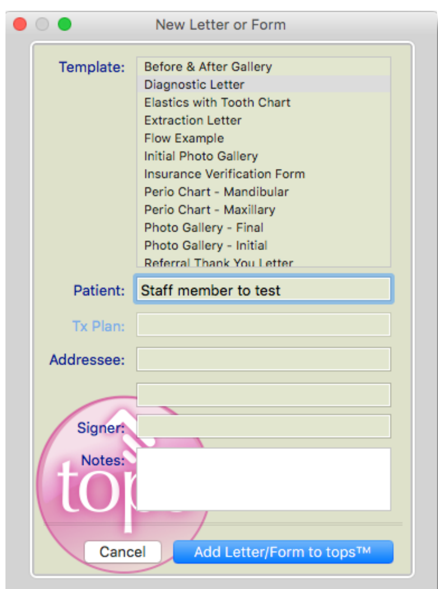


Figure 26-3: *New Letter or Form*

7. Click the Add Letter/Form to tops™ button.

8. From the topsOrtho menu on the menu bar select File and Email…

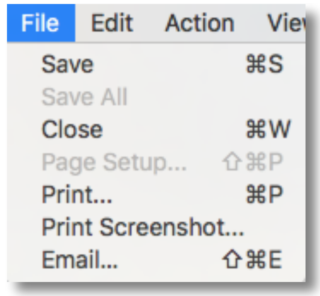


Figure 26-4: *File Menu: Email...*

9. From the Send Email sheet, select the test email address and press the Send Email button.

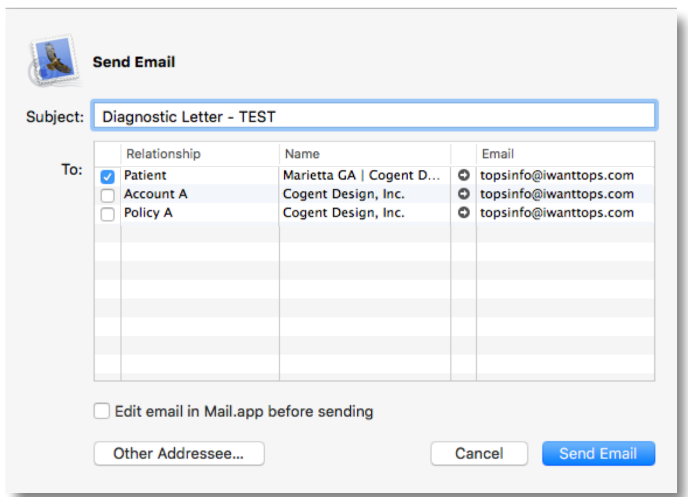


Figure 26-5: *Send Email Sheet*

10. If your mail server is set up properly, the email will be sent and marked as Sent in the patient's Letters/emails/Calls ledger.

11. If your mail server is not set up properly, the email will not be sent, and you will see the following error message:

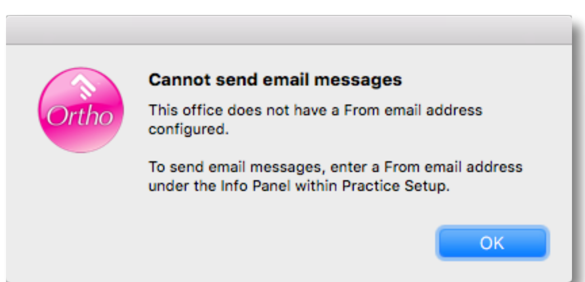


Figure 26-5: *Cannot Send Email Warning*

12. Back to the drawing board. Return to Step 1 and contact your ISP for assistance.

26B Emailing from topsOrtho

Emailing from tops is as easy and opening the letter, statement, receipt, tooth chart images, etc and navigate to the file menu and select File and Email....
and choose the associated email address(es). If the Mail.app is set up on your workstation, you can check the Edit email in Mail.app before sending checkbox and enter email addresses in the To: field and edit the message.

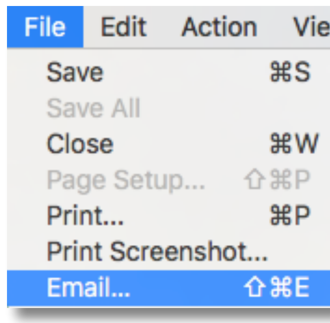


Figure 26-6: *File Menu: Email...*

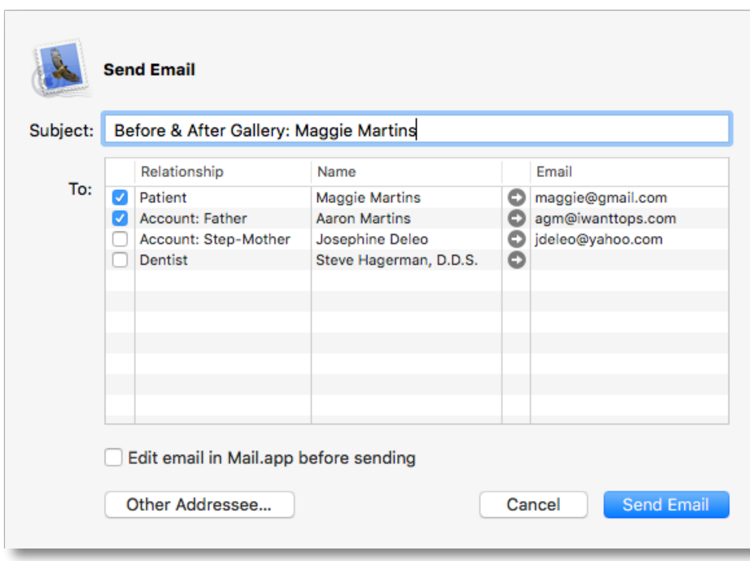


Figure 26-7: *Send Email Sheet*

Summary

In this lesson, you should feel confident with:

- Setting up the Outgoing Mail Server and Emailing from topsOrtho.

Lesson 27 A Few More Things…

Lesson Twenty-Seven Overview

This lesson focuses on a few miscellaneous, but important, items.

Objectives:

To become familiar with the above items, you will:

27A Contact Customer Support
How to contact topsOrtho customer support.

27B Back-up
Backups occur hourly, automatically, and are encrypted. Simply change out the external hard drive nightly.

27C Connect Remotely to the Office
How to connect to topsOrtho while away from your office.

27D Order topsOrtho Compatible Forms
How to order forms that are compatible with topsOrtho.

27E Final Project
Complete entering your practice information.

27A Contacting Customer Support

When calling topsOrtho Customer Support, give your name, the office you're calling from and your question. Please be as descriptive as possible so that we can help you correctly and efficiently. You may recall from Lesson One that our customer support team can connect to your computer via Screen Sharing, just like we're sitting there with you.

Phone: +1 (770) 627-2527

Email: support@topsOrtho.com

Hours: Monday–Friday, 8:00 a.m.–8:00 p.m. Eastern Time

27B Backup

Backing up is the most important function your office performs with your topsOrtho system. A clean and recent backup will save your practice data if there's a hardware failure.We can use an external backup to restore topsOrtho in about an hour.The backup method outlined here is not a "preferred" method; it's the required method and it's the only way we can restore your practice data if there is a hardware failure.

Do not clone, install Carbonite or use any other type of online/offsite backup software.

Backups are automatic, hourly, and encrypted. They are also Time Machine compatible. The hourly backups are super fast because they back up what changed during the previous hour.

Superbackup will be set up for you by your Transition Specialist.

Here's what you'll need:
- The topsServer on OS X 10.8.x or higher
- Admin login & password
- Password to use for encrypting the drives (we'll help you with this & notate the password in our records)
- Two empty external hard drives

Here's how to backup:

1. After initial set up drive A will be connected to the topsServer all day.
2. At the end of the day eject drive A (right click on the drive icon and choose eject drive or drag the drive icon to the trash). Drive A will leave the office with you at the end of the day.
3. Plug drive B into the topsServer and leave it there all night through the following evening. At the end of the day you'll eject drive B and plug in drive A and take drive B home with you. That's it! It's easy.

Remember keep one drive attached to the topsServer overnight and one drive will leave the office at the end of the day.

Additional information about backups:

Backups will occur automatically each hour at quarter of the hour, i.e., 1:45, 2:45, you can see backup status in the menu bar, and you'll get notifications when Time Machine backups are complete.

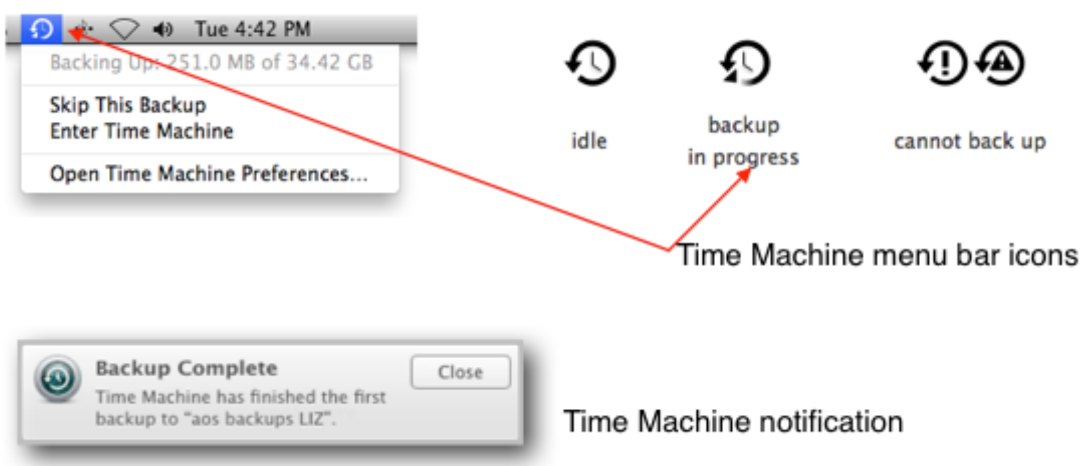


Figure 27-1: *Time Machine Notifications*

Remember performing backups is the MOST important thing you can do to protect your practice information.

Don't keep anything extraneous on your server machine. Don't run other software programs. Please remove photos and files, and trash old backups if they are on your desktop.

27C Connecting Remotely to the Office

Your topsOrtho server is configured to allow easy connections from your satellite office or home. You can do this from anywhere in the world as long as you have access to a high-speed Internet connection.

Here's how to connect to topsOrtho from a remote location:

1. Make sure your remote workstation is connected to the Internet through a high-speed connection.
2. Launch topsOrtho.
3. Enter your topsOrtho password.
4. Click the Server pop-up menu and select Edit Bookmarks.
5. Click the + button to add and on the right enter the name .
6. On the left side of the window, enter the main office's IP address.
7. Click the Use Selected Server button.
8. The first time you connect you will be asked to enter the Practice Fingerprint. Save the fingerprint to your OS X Keychain and it will store the fingerprint so you won't need to enter it for future logins.
9. Click Connect.

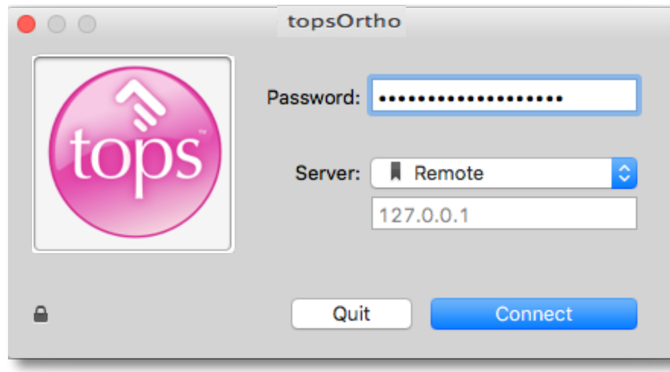


Figure 27-2: *topsOrtho Login*

There may be an alert that asks you to update the software to a new version. If this alert appears, click the ***Update*** button. After downloading the new version you will return to the topsOrtho login window. Follow the steps above to log in to the new version

27D Ordering topsOrtho Compatible Forms

DYMO 450 Turbo Appointment Slips

Item #30374 (Appointment/Business Card) OR
Item #30270 White continuous paper
Purchase at www.pcmall.com or call +1 (800) 555-6255

Statement Forms and Coupon Booklets and Appointment Card rolls for the DYMO printer can be ordered from www.topformdata.com or call +1 (800) 854-7470

Deposit Slips

Item #81019
Can be ordered from www.deluxeforms.com or call +1 (800) 328-0304

27E Final Project

Finish entering all the data for your practice.

tops Software provides a suite of state-of-the-art orthodontic software:

- topsOrtho™ is the leading Mac-based orthodontic practice management and imaging system.
- topsCephMate™ is an easy-to-use, intuitive digital cephalometric tracing and treatment program.
- topsEcho™ for the iPhone or iPad provides up-to-the-minute access to patient information and images, schedules, referrals, treatment notes and more.
- topsCheck-In for iPad™ is a fast, easy, reliable way for patients to check in using an iPad.

For more information, visit our Web site: topsOrtho.com.

For sales or customer support, please call +1 770.627.2527.

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