Users Guide

Front Desk 2017 - Practice Management System

Manual Revision Version 19, March 2017

Smartsoft (Australia) Pty Ltd
107 Flinders Street
Adelaide SA 5000

Phone	**1800 18 18 20**
International	**+61 8 8361 2666**
Fax	**1800 18 18 30**
International	**+61 2 8006 5205**
Email	**frontdesk@smartsoft.com.au**

FOREWORD

Dear Front Desk User

Thank you for choosing *Front Desk - Practice Management System* and Smartsoft for your practice management software and support.

At Smartsoft we understand the importance of your new practice management system in the running of your practice. That's why we are committed to providing you with the highest quality software and support to help make your job easier.

By investing in Front Desk you have taken the first step towards improving the management of your practice. With efficient patient processing, greater communication, better record keeping and accessible practice reporting, you can now spend less time managing your practice and have more time for your patients and yourself.

Developed in consultation with the Allied Health industry, Front Desk is constantly evolving to meet your practice management needs. Our ongoing success is only possible with your support, so please do not hesitate to contact us should you have any feedback regarding our software or support.

We look forward to our long term professional relationship.

Yours faithfully

Tony Taddeo
Managing Director
Smartsoft (Australia) Pty Ltd

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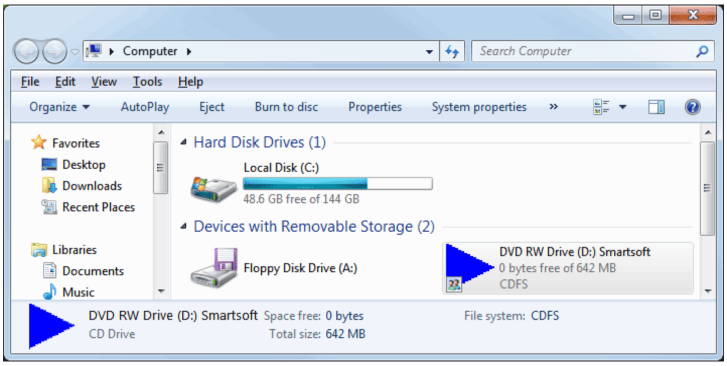
INSTALLING FRONT DESK 2017

Main Licence Installation

To install the **Front Desk 2017 - Practice Management System** you will require the *Front Desk 2017* CD, which will be supplied by Smartsoft (Australia) Pty Ltd.

Insert the **Front Desk Installation CD** into your CD-ROM. The dialog below will appear on your screen.

*Please note: If the screen above does not appear, you will need to open the Front Desk Installation CD manually. To do this, open **My Computer** or **This PC**, a screen will appear as shown below. Double click on the CD-ROM drive labelled **Smartsoft**.*



Select **Full Version** from the left hand side menu and then select the **Front Desk 2017 Installation** option.

The **Front Desk - Practice Management System (Full Version)** will now begin to install.

Congratulations, you have successfully installed Front Desk 2017.

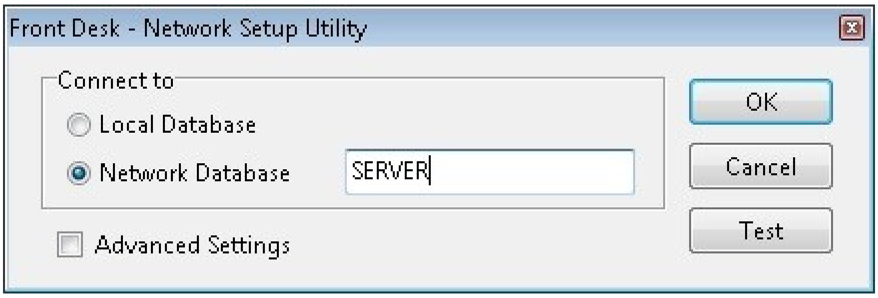
Network Licence Installation

Front Desk - Practice Management System can be used in a multi-user environment on an office computer network. Additional network licences are required for this type of installation. The **Network Client Version** should be installed on the second and subsequent computers.

Insert the **Front Desk Installation CD** into your CD-ROM. Select **Network Client Version** from the left hand side menu and then select **Front Desk 2017 Network Installation.**

This will install the network version of Front Desk 2017.

When the installation is complete, the following **Network Setup Utility** dialog will appear.



To use a database on this computer, select the **Local Database** option.

If your database is on another computer, select **Network Database**. Type the name or IP address of the database server.

Once you have selected the database location click **Test** to check your database connection.

To access the network setup utility at a later stage, select the **Network Setup Utility** option from the Network Client Version section on the CD.

Congratulations, you have successfully installed the network version of Front Desk 2017.

SETTING UP FRONT DESK 2017

Now that the operating system settings are correct and *Front Desk 2017* has been installed we can proceed with customising the system to suit your clinic requirements.

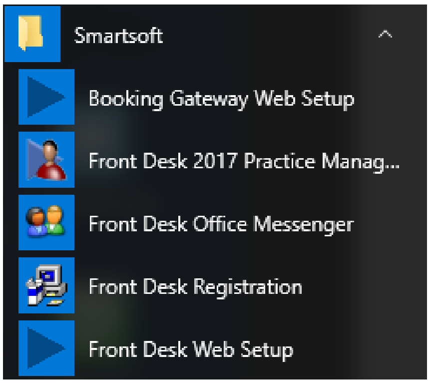
Customising *Front Desk 2017* involves the following main areas:

- ✓ Starting *Front Desk 2017* for the first time
- ✓ System Information
- ✓ Item Codes
- ✓ Practitioners

Starting *Front Desk 2017* for the First Time

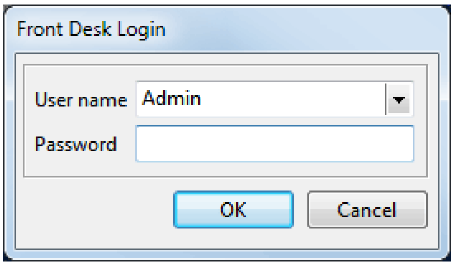
Installation of the *Front Desk 2017 - Practice Management System* introduces a new icon to your desktop.

Installation also inserts *Front Desk 2017* onto the Windows start menu. This can be found selecting the **Start** button, then navigating to the **Smartsoft** folder in the **Programs** list.



To open Front Desk 2017 either double click the *Front Desk* desktop icon or use the start menu to select **Front Desk 2017 - Practice Management System** as above.

A login screen will be presented.

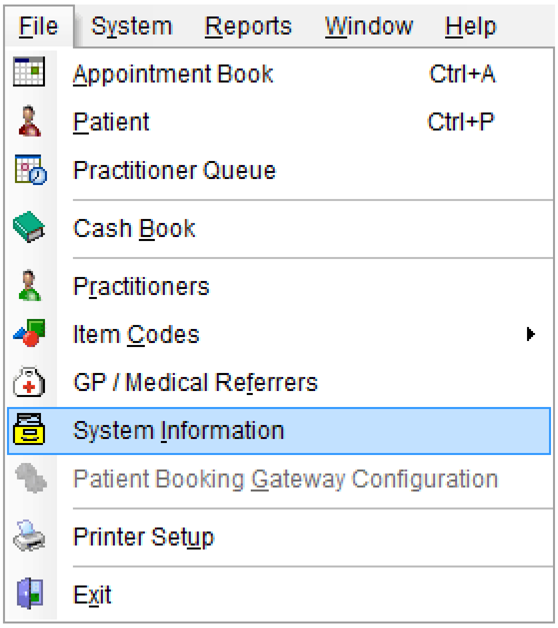


The default password is **Admin**. Click **OK** or use the **Enter** key to continue. Note that passwords in Front Desk are **not** case sensitive.

System Information

Select **System Information** from the **Toolbar**

or from the **File** menu

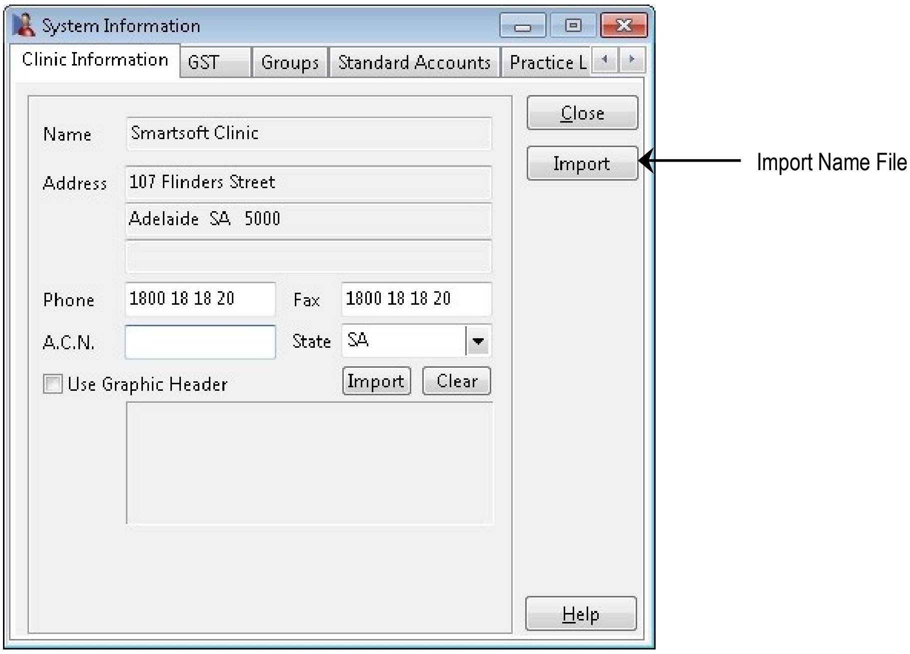


Front Desk 2017 - Tip

Front Desk 2017 is designed to be flexible and easy to use. Often there is more than one way of performing the same function. Use the method that best suits you.

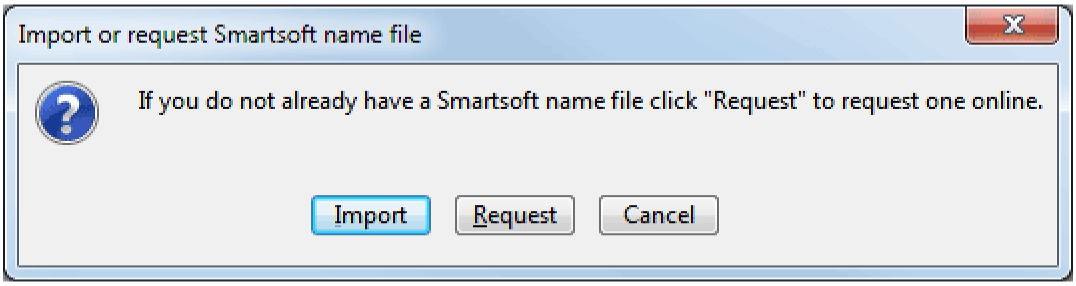
System Information - Clinic Information

The following **System Information** dialog will be presented.



To enter the clinic details, users need to request a name file from Smartsoft. This can be done by clicking **Import**.

The following dialog will appear. If you have received your Smartsoft name file click **Import**, otherwise click **Request** to request a name file.



Enter the clinic's **Phone**, **Fax** and **A.C.N.** number and select your state from the drop-down menu, this setting is important when searching for suburbs while entering addresses.

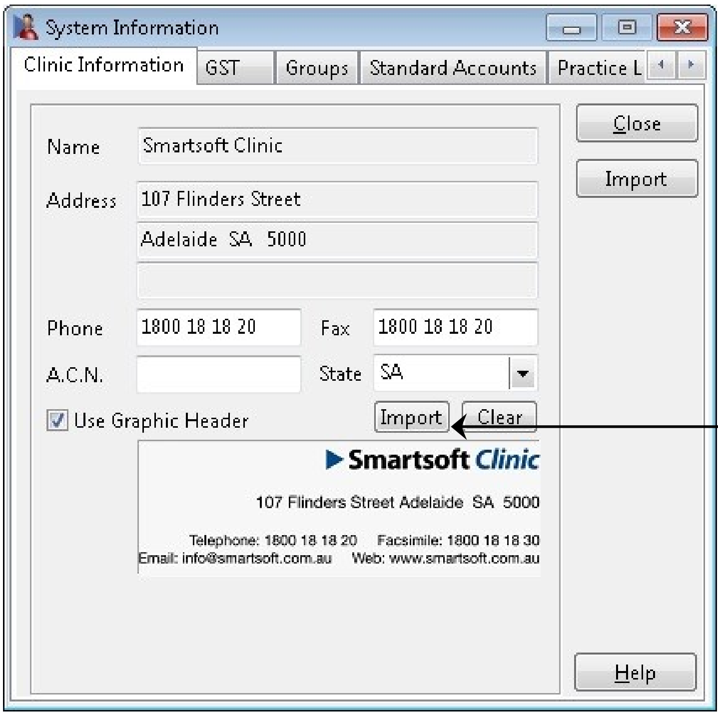
Front Desk 2017 - Tip

To move to the next field in a *Front Desk 2017* window, simply use the **<TAB>** key on the keyboard.

System Information - Clinic Information

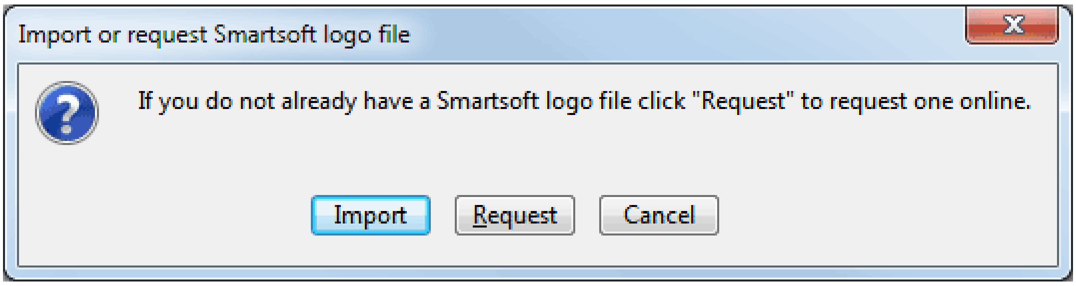
A graphic header including a practice logo can be used in the practice header on receipts, accounts, payment, quotations, appointment schedules, statements and invoices.

Users wishing to use this functionality will need to submit an image in an Adobe Illustrator® (CS3 compatible), EPS, PDF® or EMF (Enhanced Metafile) format of less than 2000KB in size and with a width/height ratio of 3:1. Smartsoft will then provide you a logo file for you to import into Front Desk 2017.



Select **Use Graphic Header** then click **Import**

When you click the **Import** button the following message will appear.



Click **Request** to upload a suitable file to Smartsoft. If the practice has already received a logo file from Smartsoft click **Import**.

An example of a graphic header can be found on the next page.

System Information - Clinic Information

Robert Jones

Smartsoft Clinic

107 Flinders Street Adelaide SA 5000

Provider No. 123456AF

Telephone: 1800 18 18 20 Facsimile: 1800 18 18 30
Email: info@smartsoft.com.au Web: www.smartsoft.com.au

Mr Justin Smith
100 The Parade
Norwood SA 5067

Medicare No: 4950-08754-1 1

Printed: 23-May-2013

R E C E I P T (Tax Invoice)

ABN 12 345 678 910

Date	Item	Description	GST	Payment	Fee
23/05/2013	AB01	Standard Consultation			$68.00
		Payment Received 23/5/2013		$68.00	
23/05/2013	P007	Lumbar Support	1		$48.95
		Payment Received 23/5/2013		$48.95	

1 ABN: 12 345 678 910 GST Total: $4.45

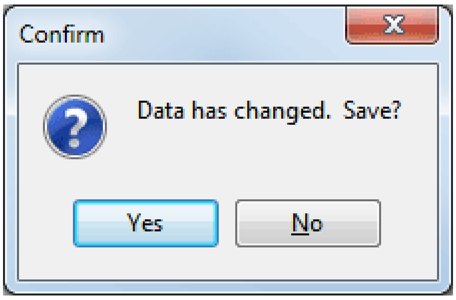
Cash $116.95

If less than 24hrs notice is given when cancelling, a fee will apply.

Total Amount Outstanding $59.90 **Paid $116.95 Billed $116.95**

System Information - Clinic Information

You can close a window in Front Desk 2017 by either clicking the **Close** button or clicking the **X** in the top right of the window.



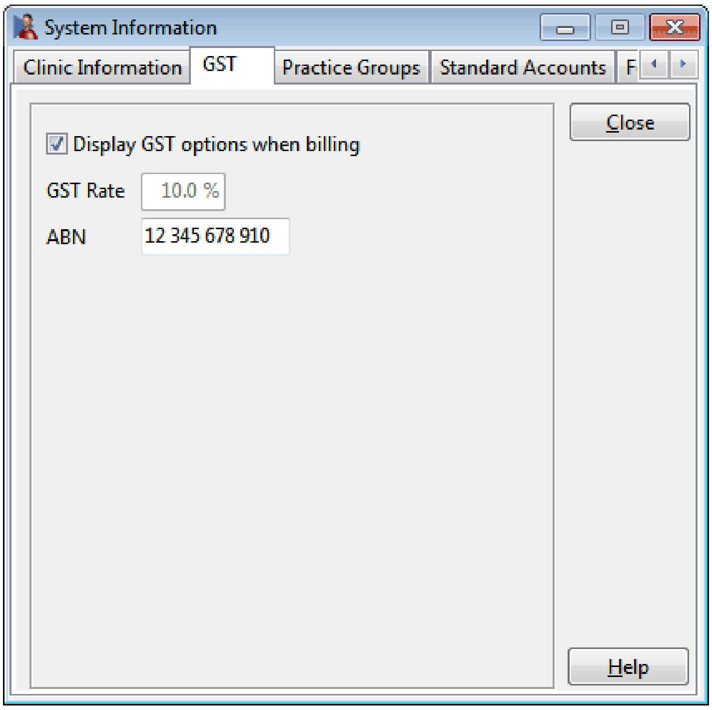
When closing a window that contains changed data, a **Confirm** dialog will appear prompting for confirmation to save changes.

Click **Yes** to save changes or **No** to cancel.

System Information - GST

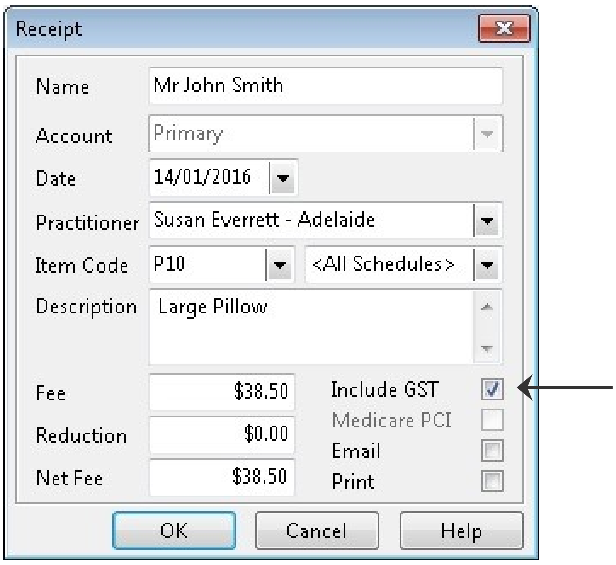
Select the **GST** tab from the **System Information** window.

To display GST when billing and receipting, select **Display GST options when billing**.



The current GST figure is displayed in the **GST Rate** field. If you require a GST rate other than the one shown in this field, please contact Smartsoft for assistance.

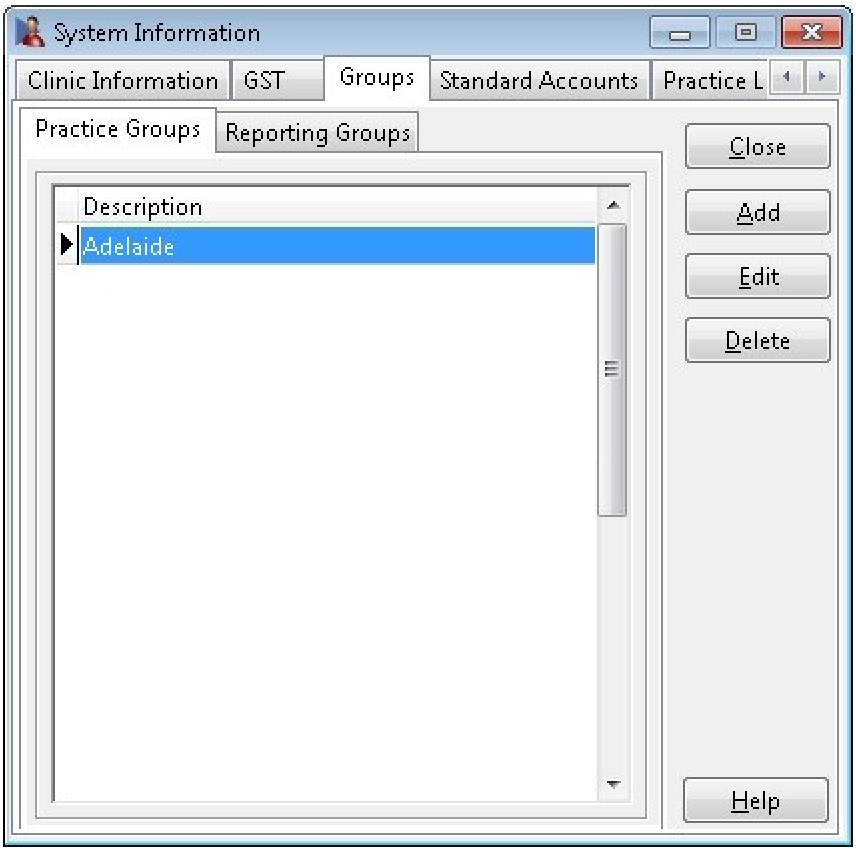
Enter your Australian Business Number into the **ABN** field.



Include GST option will be visible if selected

System Information - Practice Groups

Select the **Groups** tab from the **System Information** window.



Practice Groups allows users to group one or more practitioners within a practice.

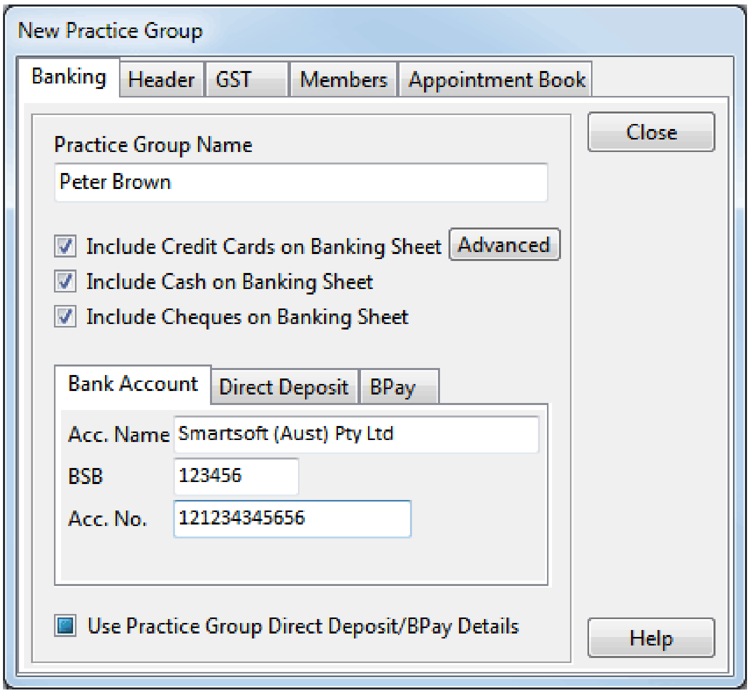
Practice Groups can then be used to produce group-based reports, use custom account headers and special GST options, as well as use custom Appointment Book time settings for members within a group.

The simplest configuration is one Practice Group with all practitioners in that group.

To create a new practice group, click the **Add** button.

System Information - Practice Groups (Banking)

The **New Practice Group** dialog will be displayed.



Enter the name of the practice group in the **Practice Group Name** field.

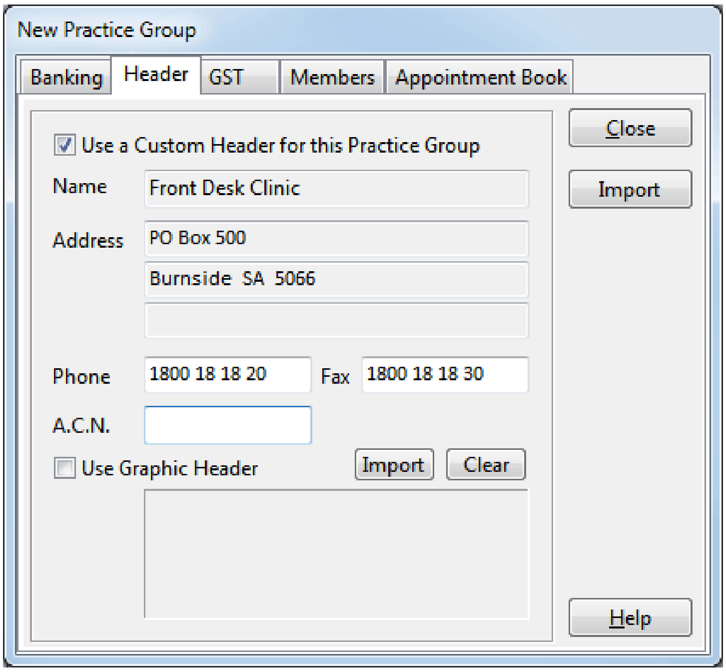
Select the appropriate options to include on your banking sheets. If the practice group accepts EFTPOS payments, credit cards should not be included. Enter the clinic's account name **(Acc. Name)**, bank branch number **(BSB)** and account number **(Acc. No.)**.

If the Practice Group is to use different Direct Deposit and BPAY details than the clinic, select **Use Practice Group Direct Deposit/BPAY Details** and enter the details to be used by this practice group in the Bank Account, Direct Deposit and BPay tabs.

To include specific credit cards on the banking sheet, click the **Advanced** button and select which credit cards should appear.

System Information - Practice Groups (Header)

Select the **Header** tab from the **New Practice Group** dialog.

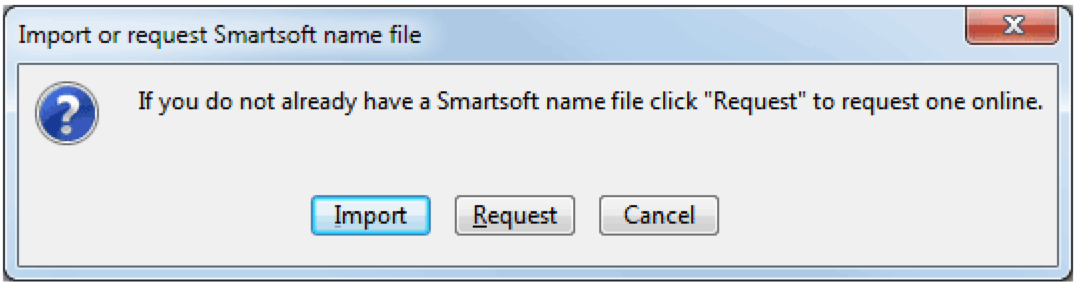


Only check the **Use a Custom Header for this Practice Group** option if the practice group requires their own custom header details to be displayed on invoices, accounts and receipts, which differ from the details on the Clinic Information tab.

To be able to enter the practice group details, users need to request a name file from Smartsoft.

This can be done by clicking **Import**.

The following dialog will appear. If you have received your Smartsoft name file click **Import**, otherwise click **Request** to request a name file.



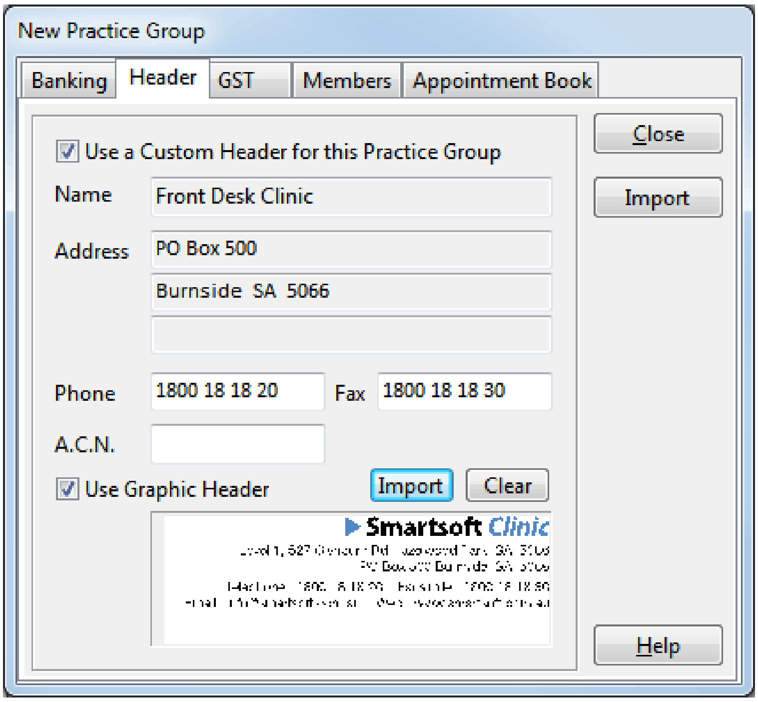
Enter the clinic's **Phone**, **Fax** and **A.C.N.** number.

System Information - Practice Groups (Header)

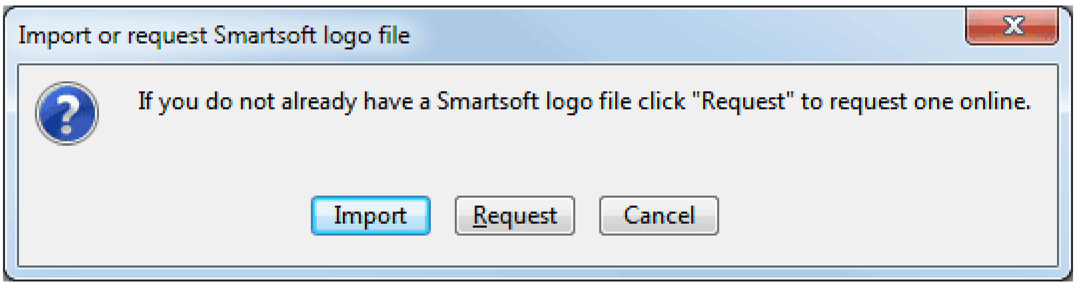
A graphic header image including a practice logo can be used in the practice group header on receipts, accounts, payment, quotations, appointment schedules, statements and invoices.

Users wishing to use this functionality will need to submit an image in an Adobe Illustrator® (CS3 compatible), PDF or EMF (Enhanced Metafile) format of less than 2000KB in size and with a width/height ratio of 3:1 or less.

Smartsoft will then provide a logo file to be imported into *Front Desk 2017*.



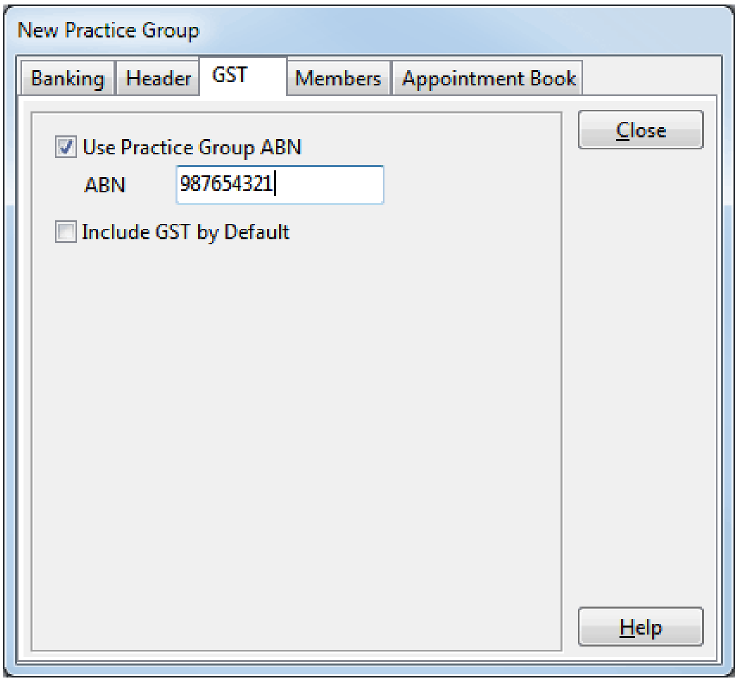
When you click the **Import** button the following message will appear.



Click **Request** to upload a suitable file to Smartsoft. If the practice has already received a logo file from Smartsoft click **Import**.

System Information - Practice Groups (GST)

Select the **GST** tab from the **New Practice Group** dialog.

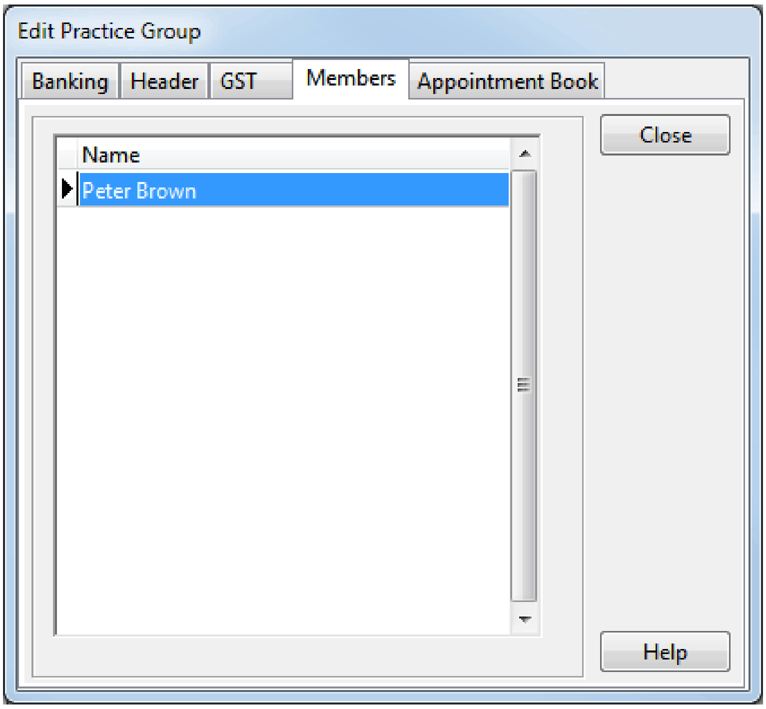


If the practice group has an ABN which differs from the Clinic ABN, select the **Use Practice Group ABN** option and enter the number into the **ABN** field.

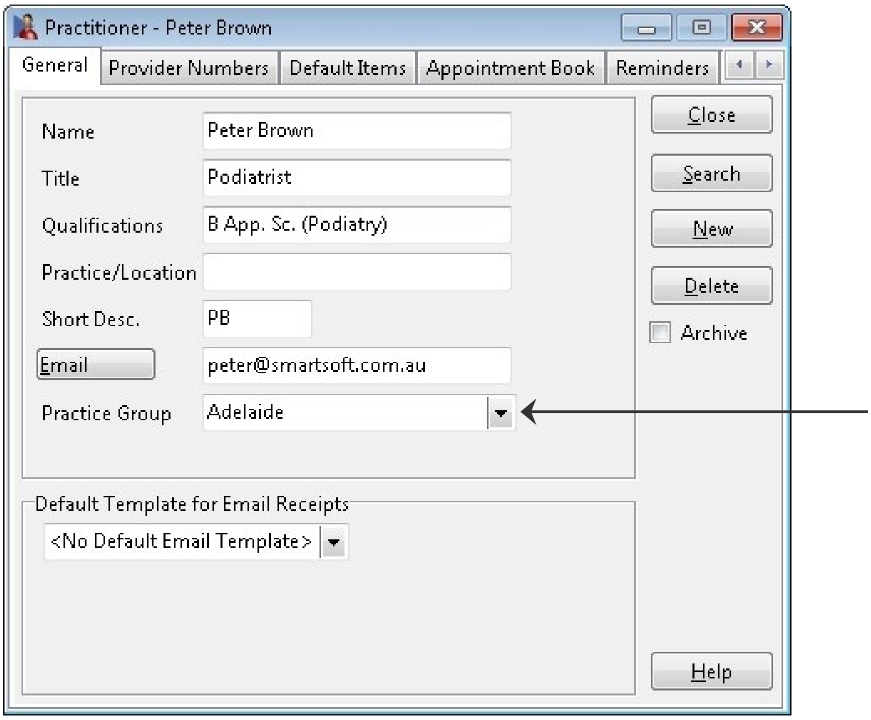
Select **Include GST by Default** if all items billed by this practice group should include GST by default. Generally, this should not be selected for most practices as billed items generally do not include GST. This may however be useful for health providers that are not exempt from GST such as massage therapists.

System Information - Practice Groups (Members)

Select the **Members** tab from the **New Practice Group** dialog.



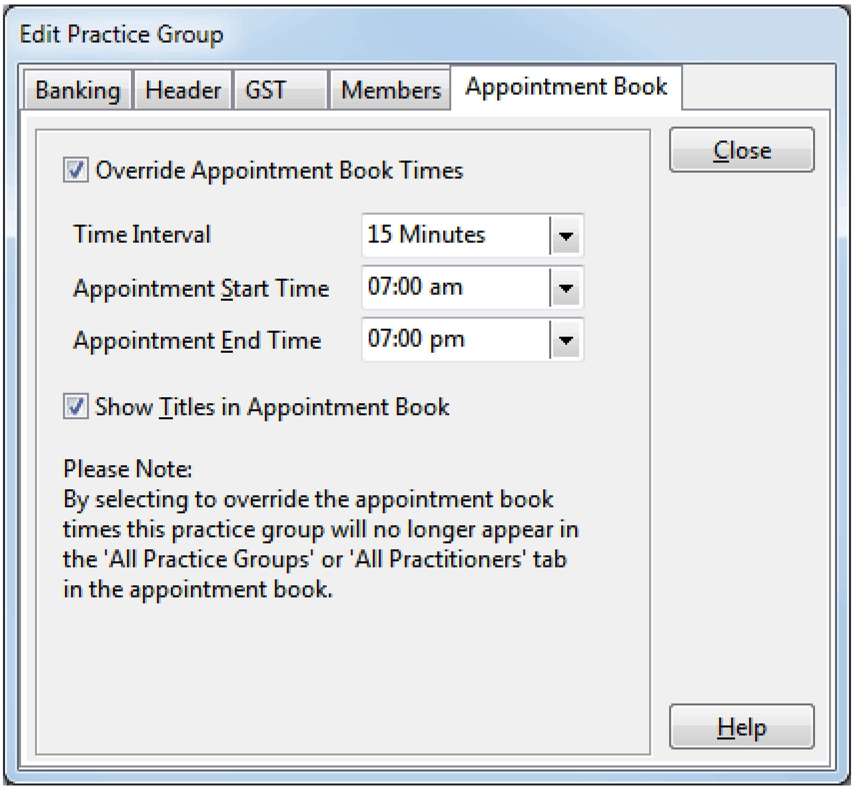
The members of the practice group are displayed. A practitioner nominates his or her practice group within their own practitioner file, as shown below. This will be covered at a later stage.



Practice Group is nominated in each practitioner's file

System Information - Practice Groups (Appointment Book)

Select the **Appointment Book** tab from the **New Practice Group** dialog.



This section allows you to customise the appointment book time intervals for specific practice groups.

Select the **Override Appointment Book Times** option and set the appropriate times for this practice group, if different to the main practice setup.

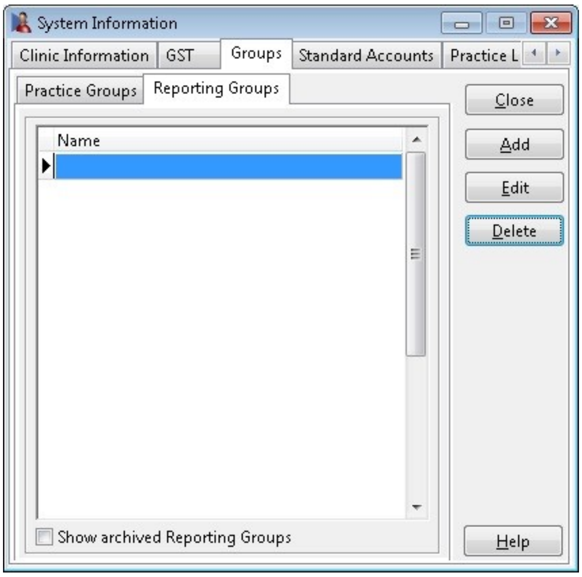
Show Titles in Appointment Book gives you the option of showing the patient's title in the appointment book, for example, Mr, Mrs, Ms. Unchecking this option can reduce the size required for the columns in your Appointment Book.

Front Desk 2017 - Note

If the **Override Appointment Book Times** option is selected for a practice group, that practice group will no longer appear on the **All Practice Groups** tab or the **All Practitioners** tab at the bottom of the appointment book as the appointment intervals for this practice group will differ from the main appointment book.

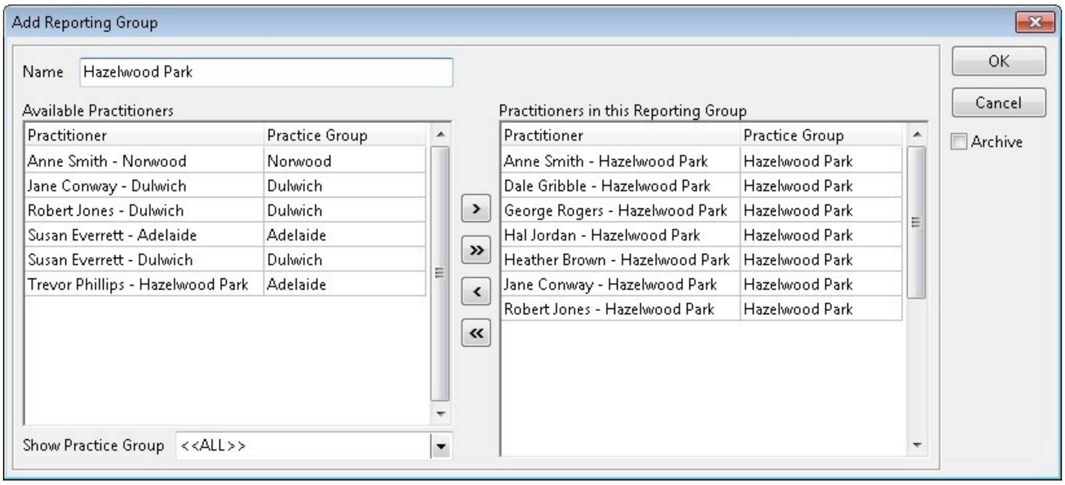
System Information – Reporting Groups

Select the **Reporting Groups** tab.



Reporting Groups allow users to group one or more practitioners for reporting purposes. This does not affect the use of Practice Groups.

To create a new reporting group, click the **Add** button.



Enter the **Name** of the reporting group being created.

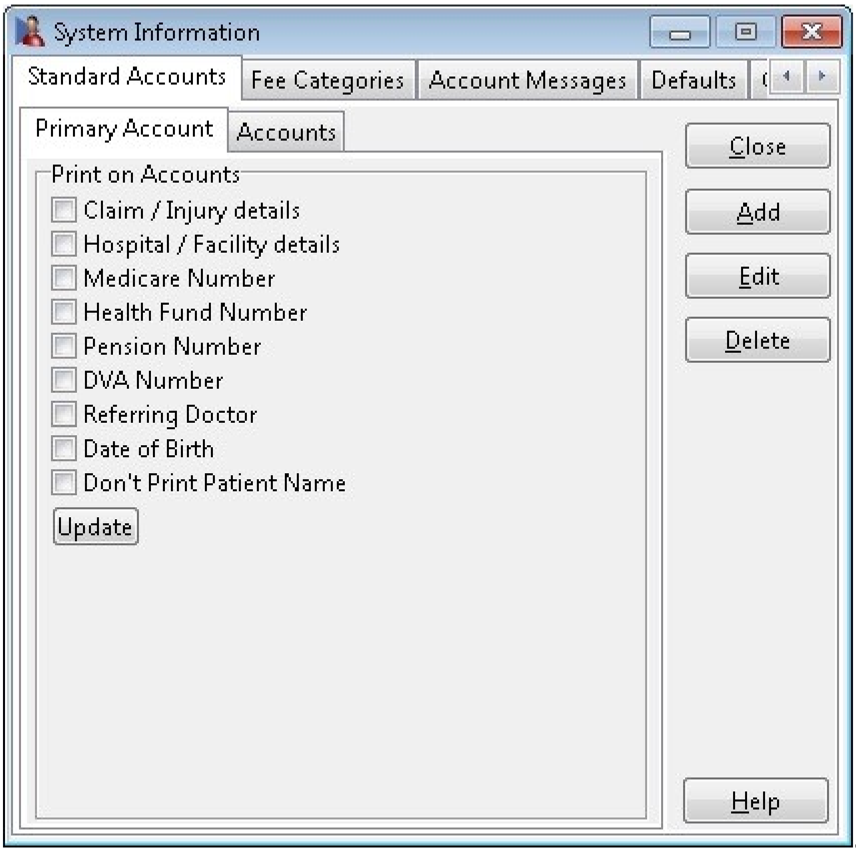
Using the arrows in the middle of the dialog, move the practitioners you want in the **Reporting Group** to the right.

To make this process easier, the **Available Practitioners** list can be filtered by **Practice Group** in the bottom left of the dialog.

Click **OK** to save the **Reporting Group**.

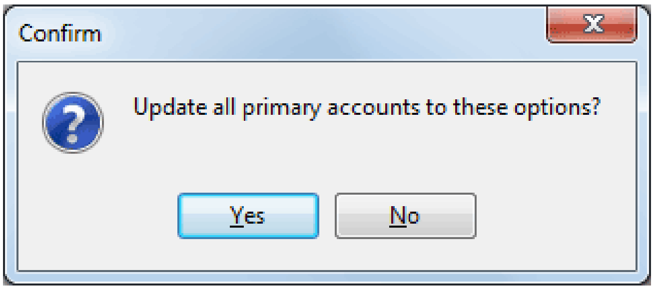
System Information - Standard Accounts

Select the **Standard Accounts** tab from the **System Information** dialog.



Under the **Primary Account** tab, set the **Print on Accounts** options for the default **Primary** account.

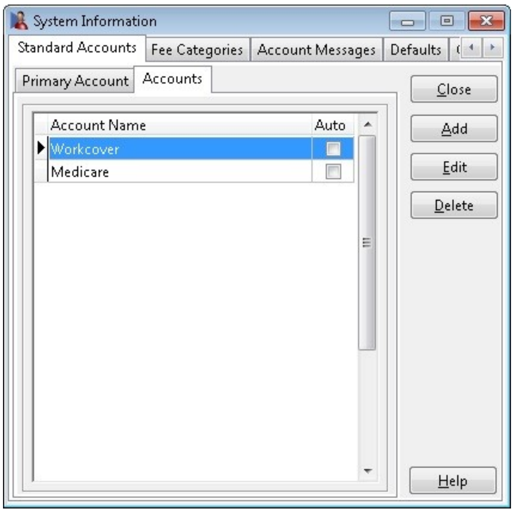
To update these options in all existing patient files, click **Update.**



Click **Yes** to confirm the update, or **No** to cancel.

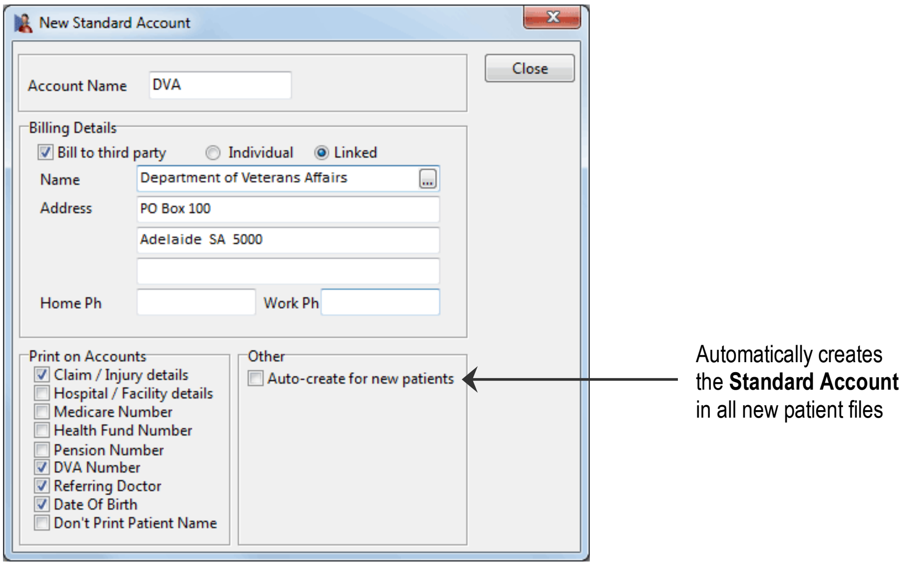
System Information - Standard Accounts

Select the **Accounts** tab.



Standard Accounts allows users to create pre-set billing accounts which may be used on a regular basis. Once created the accounts will be available under the **Billing Details** tab of the patient file.

To create a **Standard Account** click **Add**.



Enter an **Account Name** which describes the billing account.

Select **Bill to third party** to enter a third party biller under either the **Individual** or **Linked** option.

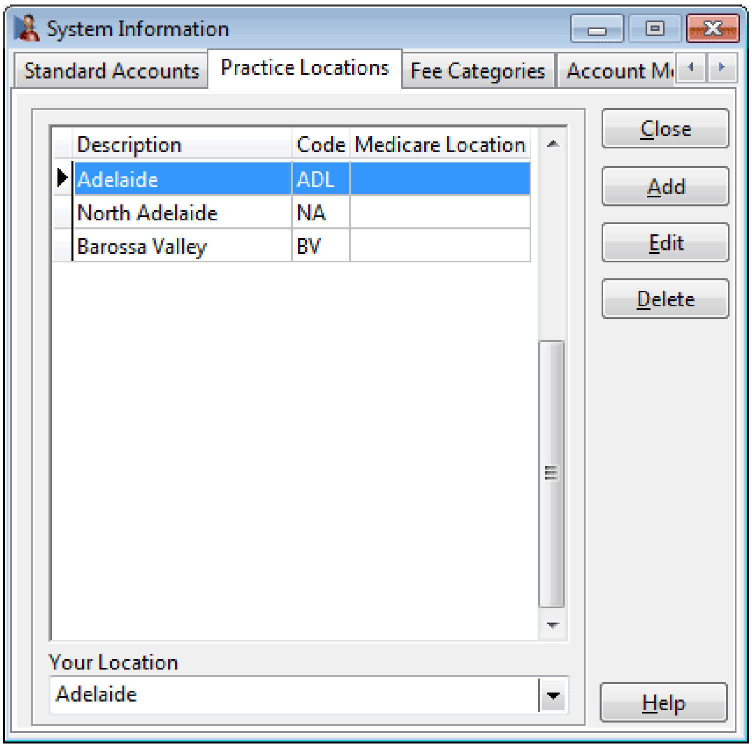
Select the desired **Print on Accounts** options to be enabled when using this billing account.

Click **Auto-create for new patients** to have this billing account automatically added when creating new patient files.**Setting Up Front Desk 2017**

System Information - Practice Locations

Select the **Practice Locations** tab from the **System Information** dialog.

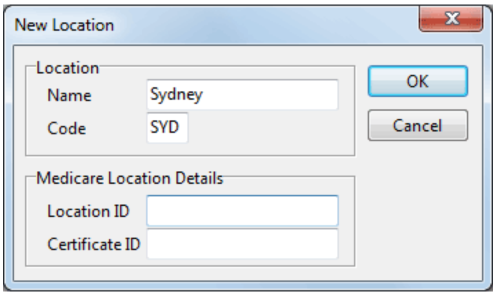
Please note this tab is only available when **Multiple Locations** has been enabled from the **Advanced** tab of **System Information**.



Enabling **Multiple Locations** allows users to setup individual locations, which can then be used in reporting to filter the results based on the set location.

Once enabled each computer running Front Desk connecting to the database must be set with a location under **Your Location**. This will then begin tracking transactions that are entered through that computer as being from the set location.

Click **Add** to create a new location.



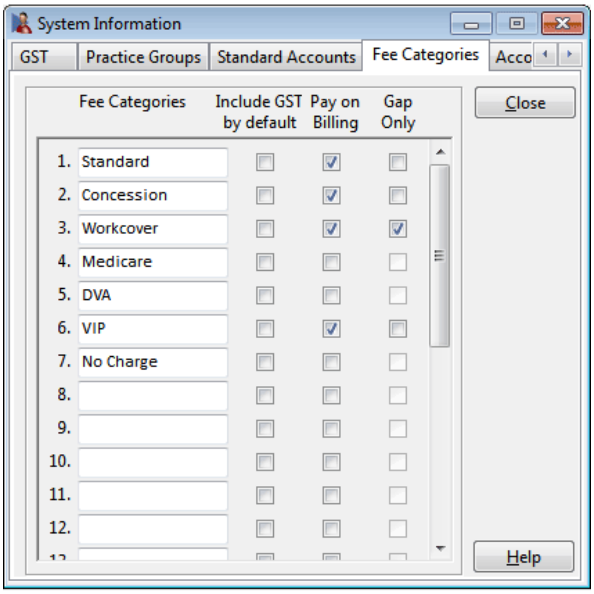
Enter the location **Name** and the **Code** to be used.

If this location requires **Medicare Location Details** which are unique to that particular location, enter the required **Location ID** and **Certificate ID.**

Click **OK** to complete the location.

System Information - Fee Categories

Select the **Fee Categories** tab from the **System Information** dialog.

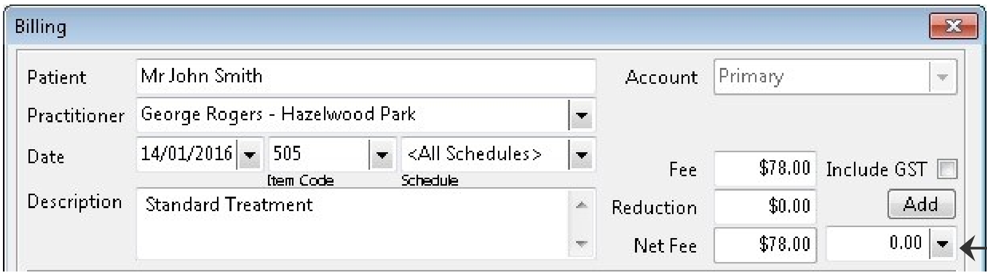


Enter the different fee categories for your practice.

Please note that fee categories are not item codes such as initial consultation or subsequent consultation, they are patient categories that may be billed different amounts for the same item or require a different code for the same item. Do not enter your item codes in Fee Categories. Item codes will be entered in another section of the system.

Each patient within *Front Desk 2017* needs to be associated with a Fee Category. For example, Mary may be a **Concession** patient and thus gets charged concession rates. Frank on the other hand is charged the full rates because he is a **Standard** full fee paying patient.

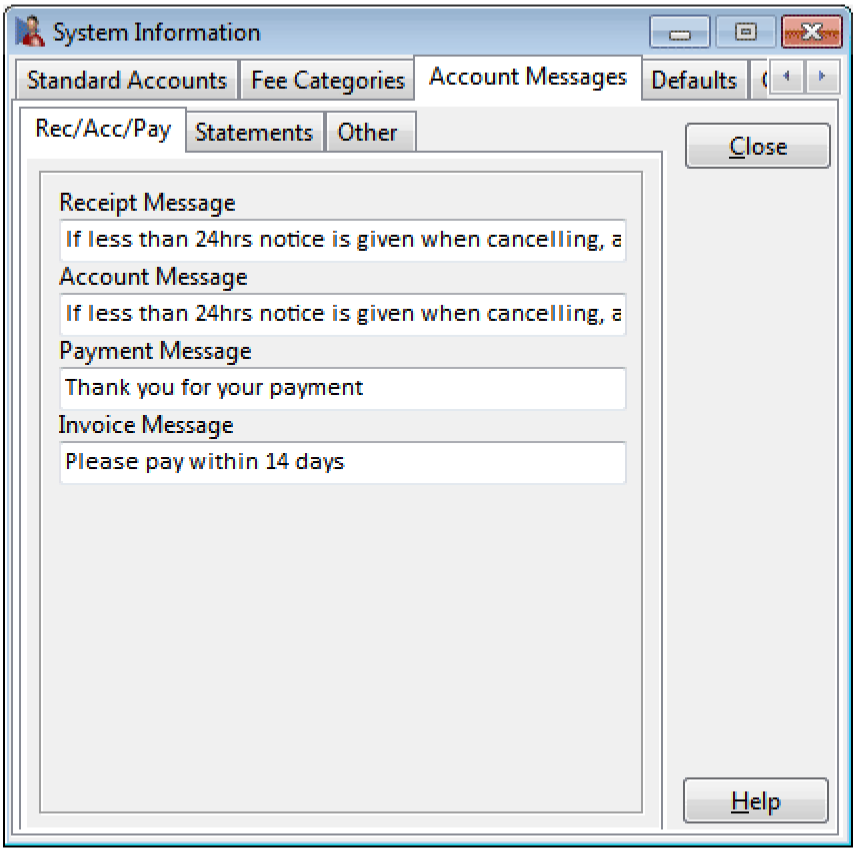
To include GST on all items billed for a particular category, select the **Include GST by default** option. The **Pay on Billing** option determines whether the payment component of a bill defaults to the amount being billed or alternatively no payment. The **Gap Only** option sets a gap payment as the default payment. For example, **Standard** patients could have the **Pay on Billing** option checked, **VIP** clients may have **Gap Only** checked and **WorkCover** patients will have both options unchecked, indicating no payment when billing, as payment is generally not received at the time of consultation.



Payment defaults to zero if the Pay on Billing option is not selected.

System Information - Account Messages

Select the **Account Messages** tab from the **System Information** dialog.



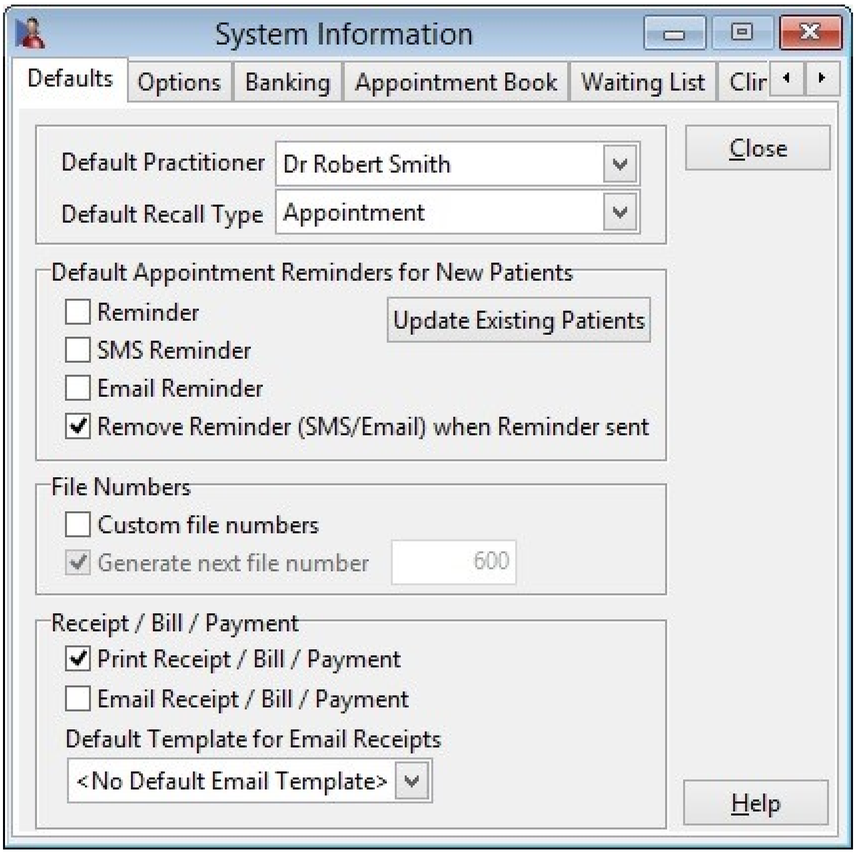
Messages can be automatically printed at the bottom of the following print outs:

- Receipts
- Accounts
- Payments
- Invoices
- Statements
- Appointment schedules
- Quotations

Select the appropriate tab and enter the message into the corresponding field.

System Information - Defaults

Select the **Defaults** tab from the **System Information** dialog.



The **Default Practitioner** is the practitioner who is automatically assigned to new patients. Generally, the main or busiest practitioner in the practice is selected as the default. The default practitioner cannot be specified at this time, as we have not entered any practitioners. This option will be re-visited once the practice's practitioner(s) have been entered.

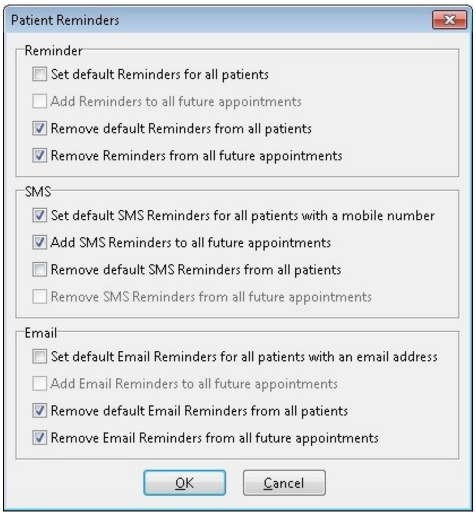
The **Default Recall Type** is the recall type assigned automatically when making an appointment or when creating a recall in the patient file.

Default Appointment Reminders for New Patients allows users to select whether a Reminder, SMS Reminder or Email Reminder is set by default when creating new patient files.

Remove Reminder (SMS/Email) when Reminder sent - this option automatically removes the reminder flag from an appointment after sending an SMS / Email reminder.

Update Existing Patients allows users to set reminder defaults for existing patients and appointments.

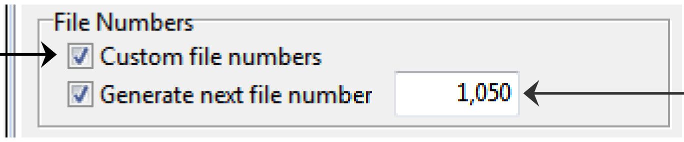
System Information – Defaults



File Numbers

A file number is associated with every patient file created.

Select this option for Front Desk to generate the next file number in your series

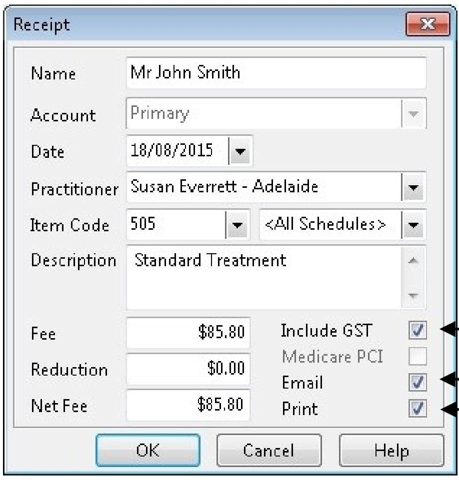


Select this option to edit and enter your own file numbers and enter the number to use for the next new patient file

Custom file numbers allows you to enter your own file numbers. The file number field on the patient file will be blank unless you manually type one in. If you want *Front Desk 2017* to automatically generate file numbers, check **Generate next file number** and enter the next file number to use.

The **Print Receipt / Bill / Payment** option determines whether receipts, bills and payments are printed by default.

The **Email Receipt / Bill / Payment** option determines whether receipts, bills and payments are emailed by default.



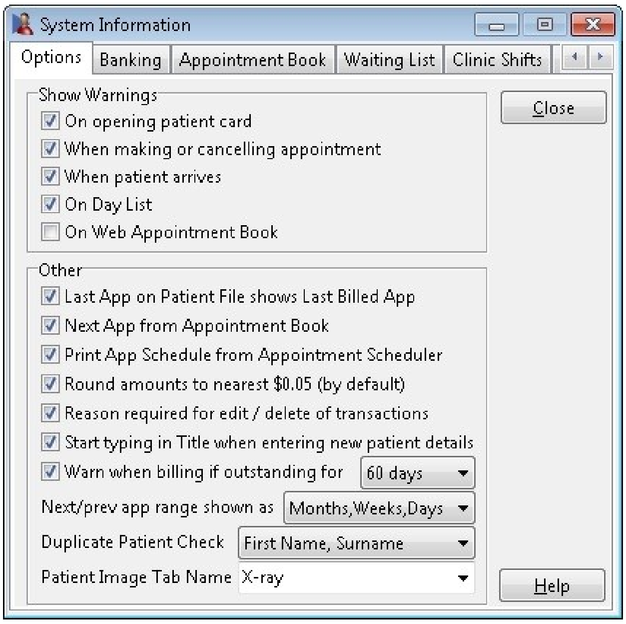
If this option is selected the transaction will be recorded with GST

If this option is selected, receipts and bills will be selected to email by default

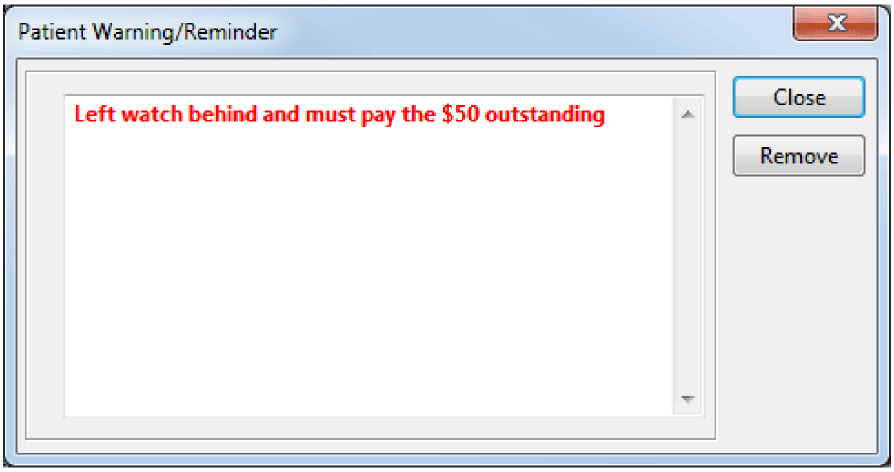
If this option is selected, receipts and bills will be selected to print by default

System Information - Options

Select the **Options** tab from the **System Information** dialog.



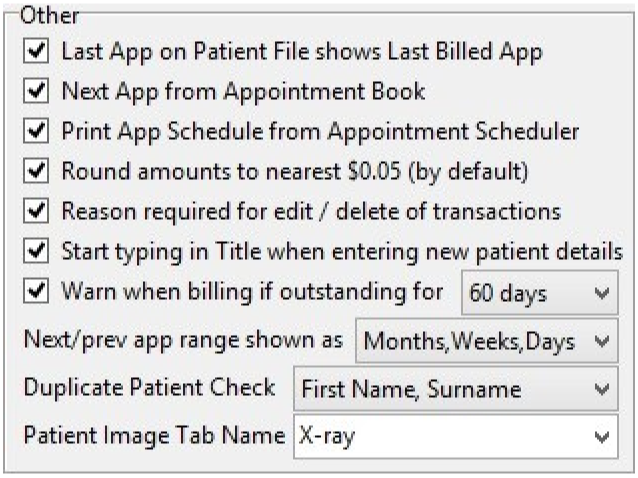
The **Show Warnings** options determine when patient warnings are to be displayed. Messages such as “bad payer”, “requires a taxi” or “left items behind” can be displayed when opening the **patient card, making/cancelling an appointment** and/or when the **patient arrives**. Warnings can also be set to display on the **Day List** report and **Web Appointment Book**. If none of the options are selected warnings will still appear but only when receipting and/or billing.



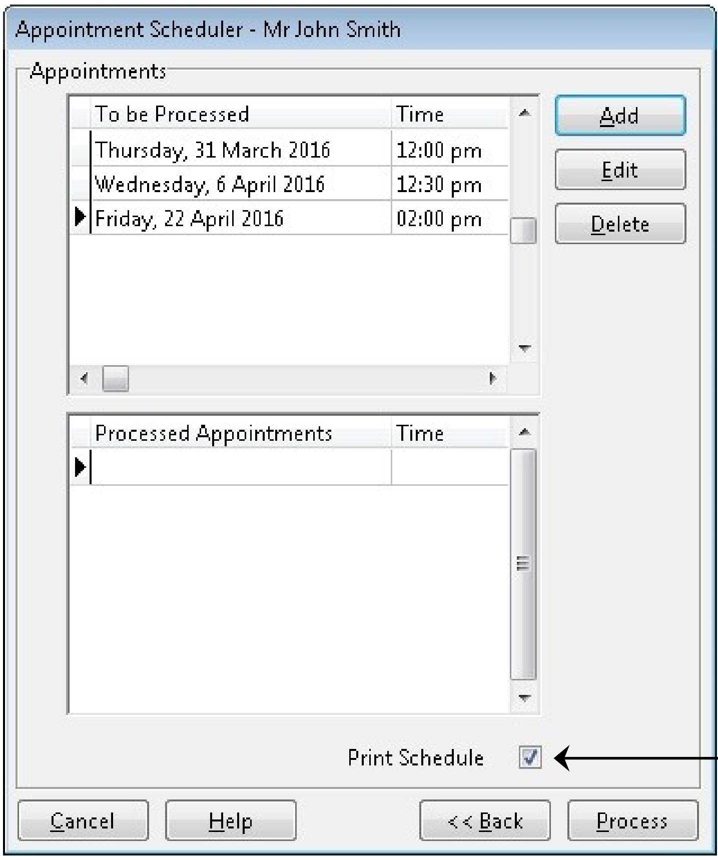
System Information - Options

The next scheduled appointment for patients can be printed on receipts and accounts. If you intend to use the Front Desk Appointment Book, please ensure that **Next Appointment from Appointment Book** is selected.

Alternatively, if you are not using the Appointment Book deselect this option to manually enter the next appointment details at the time of receipting or billing.



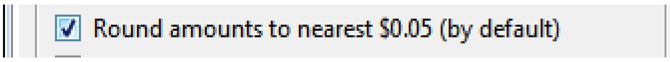
The **Print Appointment Schedule from Appointment Scheduler** option determines whether an appointment schedule is printed by default or on request.



The appointment schedule will automatically print if this option is selected

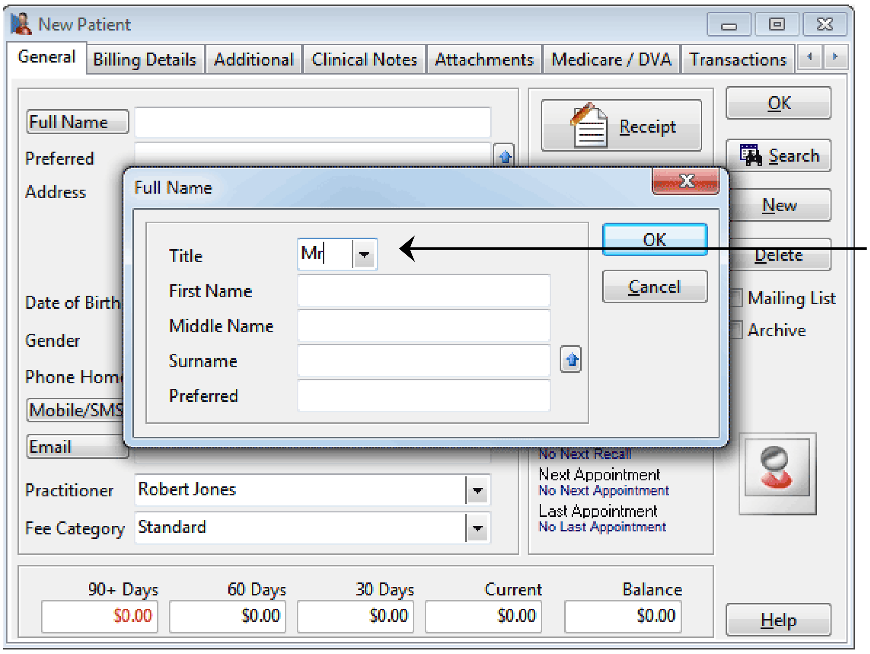
System Information - Options

Round amount to nearest 5 cents - automatically rounds amounts to 5 cents.



Reason required for edit / delete of transactions - if this option is ticked you will be prompted for a reason when a transaction is deleted or edited.

Start typing in Title when entering new patient details - this option sets the cursor into the Title field when entering new patient details.



Depending on which option is selected, the cursor will either start in the Title field or First Name field

Warn when billing if outstanding for selected number of days. A pop up notification will appear if the patient has outstanding amounts for more than the selected period.

Next / prev app range shown as – this option allows users to change the description of the length of time since or until an appointment.

- Months, Weeks, Days
- Weeks, Days

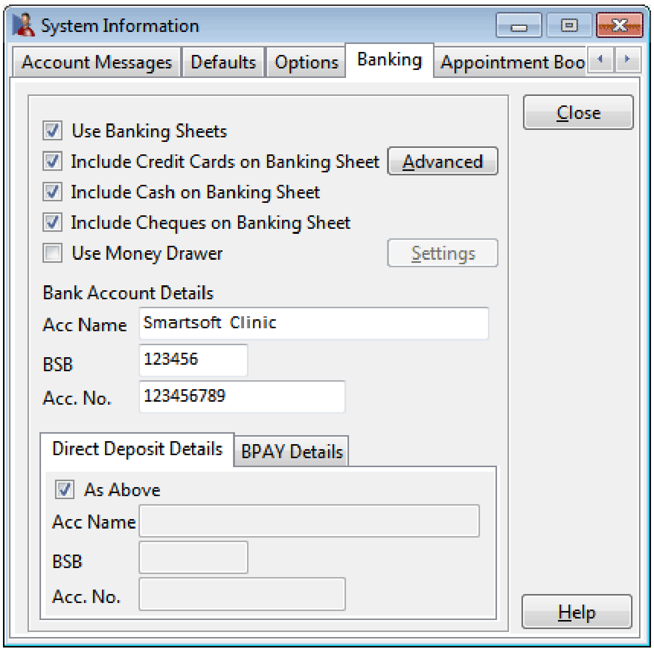
Duplicate Patient Check - select one of the following options so *Front Desk 2017* can search for duplicate patients when entering new patients.

- First Name, Surname
- First Name, Surname, DOB or
- Don't Check

Patient Image Tab Name can be used to change the name of the X-ray tab in the patient file.

System Information - Banking

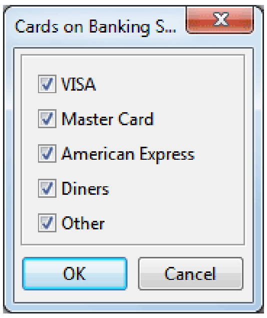
Select the **Banking** tab from the **System Information** dialog.



To use the banking sheets produced by *Front Desk 2017* select the **Use Banking Sheets** option. All payments made will now require a payment type method i.e. cash, cheque, credit card, EFTPOS etc.

Select the appropriate options to include on your banking sheets. If your practice accepts EFTPOS payments, credit cards should not be included. Enter the clinic's account name **(Acc. Name)**, bank branch number **(BSB)** and account number **(Acc. No.)**.

To include specific credit cards on the banking sheet, click the **Advanced** button and select which credit cards should appear.

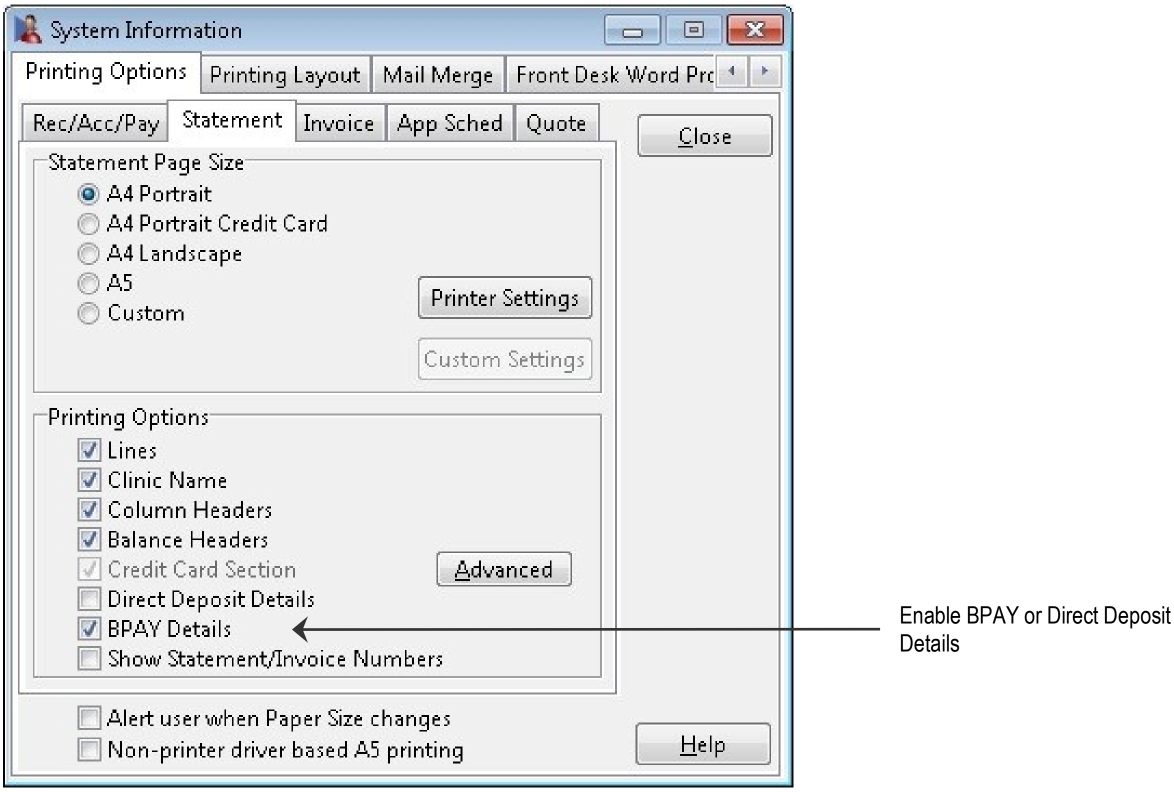


Direct Deposit Details can be displayed on **Statements** and **Invoices**. To use these details, enable the option on the **Statements** or **Invoices** tab found under the **Printing Options** section in **System Information**. If **As Above** is selected the Bank Account Details entered previously are used as the direct deposit details.

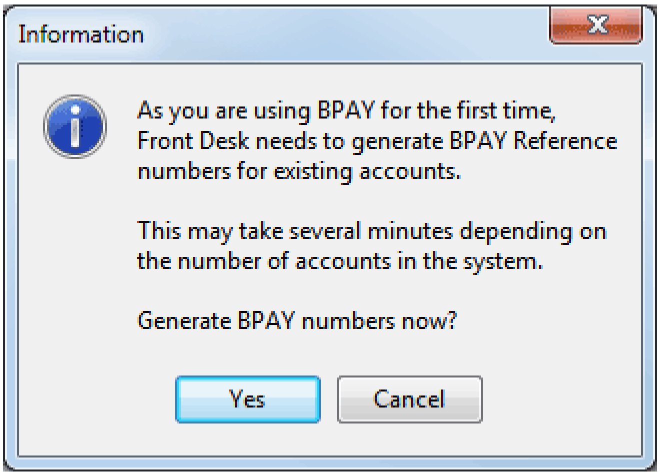
A **Money Drawer** which opens automatically when accepting payment can be integrated with *Front Desk 2017*. Please contact Smartsoft for more information.

System Information - Banking

BPAY Details can also be displayed on **Statements** and **Invoices.** To enable the BPAY functionality, select the **Printing Options** tab and check the **BPAY Details** option under **Printing Options**.

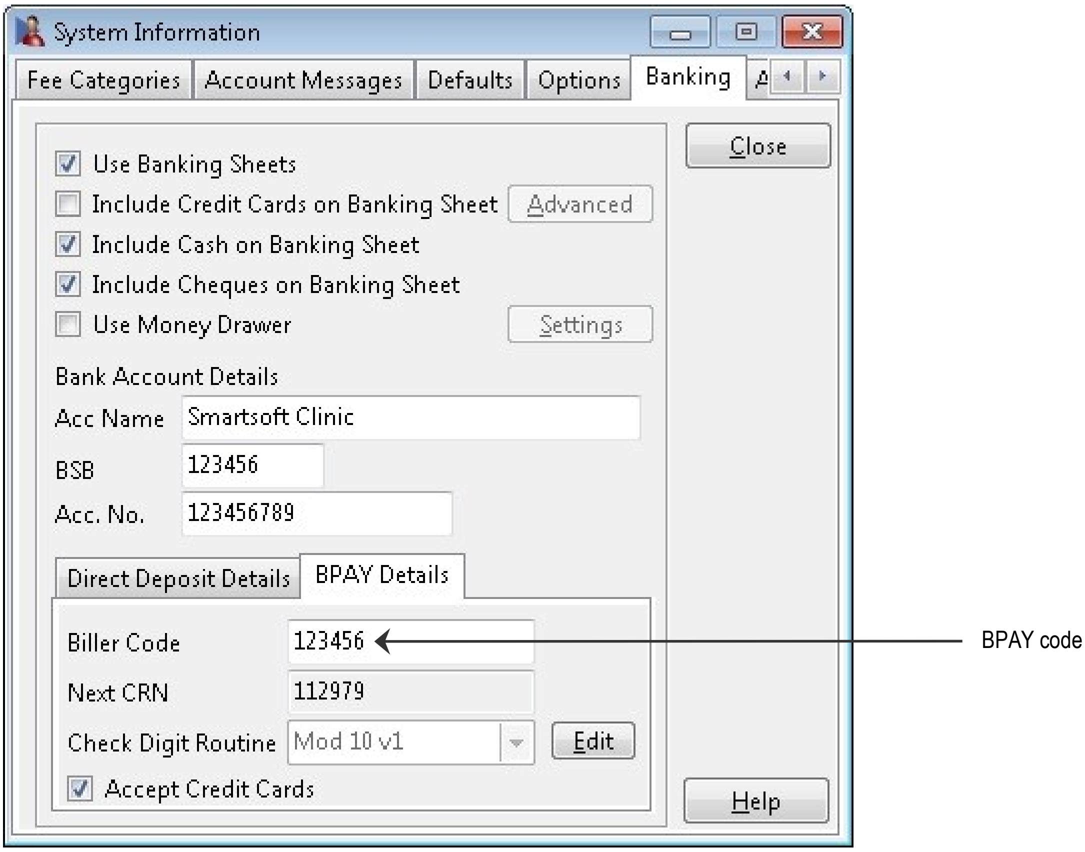


When turning on this function for the first time, *Front Desk 2017* will automatically generate unique BPAY reference numbers for your existing patients.



System Information - Banking

Add your bank-supplied BPAY code, which identifies your business to BPAY payers in **System Information** on the **Banking** tab.



Users can change the **Check Digit Routine** between **Mod 10 v1** and **Mod 10 v5**, which affects how BPAY Customer Reference Numbers are generated. It is recommended that users confirm with their bank regarding which routine to use before configuring BPAY options.

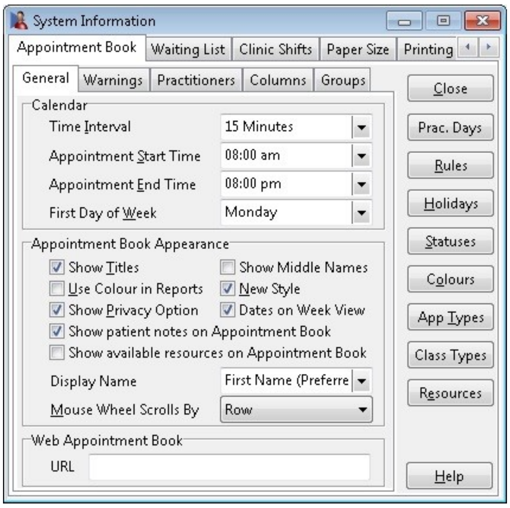
Select **Accept Credit Cards** to allow accept credit card payments when using BPAY, which affects the text printed on Statements / Invoices regarding BPAY payment options.

Front Desk 2017 - Note

Practitioners have the option to either bank to the clinic account, their practice group account or to their own accounts. For example, *Front Desk 2017* can group the banking of several practitioners into one account (through Practice Groups), while other practitioners can bank separately to their own individual accounts.

System Information - Appointment Book(General)

Select the **Appointment Book** tab from the **System Information** dialog.



In the **General** tab select the **Time Interval** for your appointments in the Appointment Book. Specify the **Appointment Start Time** and **Appointment End Time**. If these times vary on different days, then select the earliest and the latest times an appointment can be made at the practice over the entire week.

First day of week - the day of the week the Appointment Book calendar begins.

Show Titles - shows the patient's **Title** in the Appointment Book i.e. Mr, Mrs, Ms.

Show Middle Names - gives you the option to display the patient's **Middle Name** on the appointment book.

Use Colour in Reports - previewing and printing the Appointment Book reports are in colour by default.

New Style - changes the appearance of appointments spanning multiple intervals to not include diagonal lines. This option has been added for backwards compatibility with older versions of Front Desk.

Dates on Week View – displays dates on the column headers of the Appointment Book in Week View.

Show Privacy Option - enables the Privacy option on the Appointment Book.

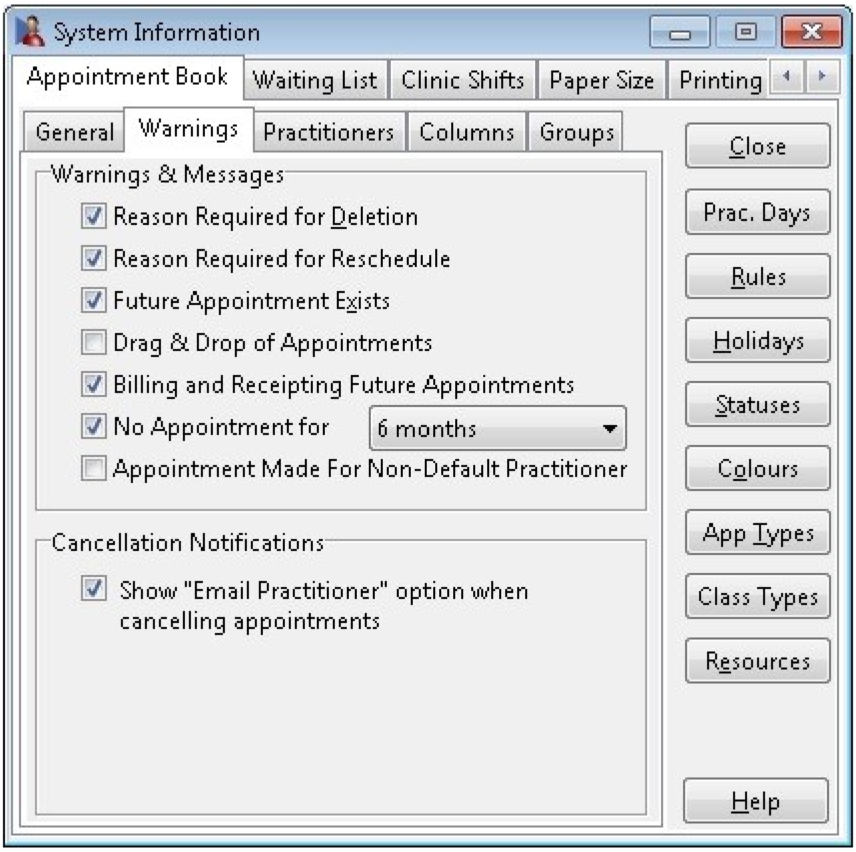
Show patient notes on Appointment Book – includes patient notes in the tooltip when hovering over an appointment.

Show available resources on Appointment Book – includes available resources in the tooltip when hovering over an appointment.

Display Name - alters how the patient's name appears in the appointment book. This option also affects the **Day List** report and **Appointment Book** report.

Wheel Mouse Scroll By - provides control of how the scroll wheel works when in the Appointment Book.

System Information - Appointment Book (Warnings)



Reason Required for Deletion - prompts for a reason when cancelling appointments.

Reason Required for Reschedule – prompts for a reason when rescheduling appointments.

Future Appointment Exists - displays a warning message when making an appointment if the patient has already booked a future appointment.

Drag & Drop of Appointments - displays a warning message when dragging an appointment from one appointment slot to another.

Billing and Receipting Future Appointments - displays a warning message if a patient is being billed or receipted for a date in the future.

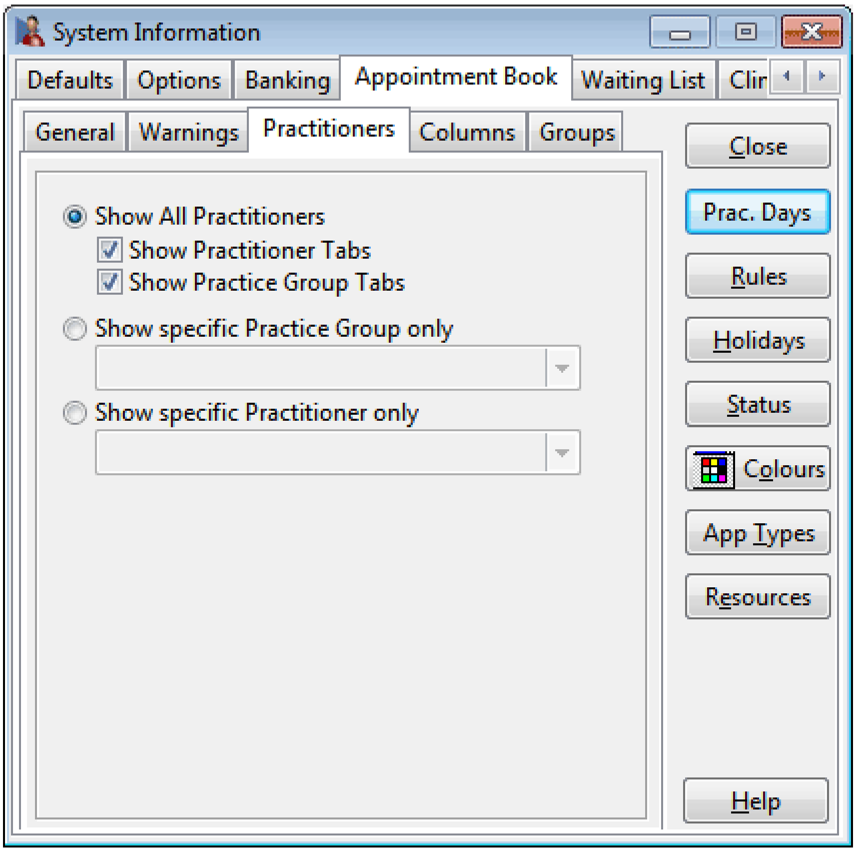
No Appointments for - displays a warning message when making an appointment for a patient who hasn't been to the clinic for a particular amount of time i.e. 1 month to 5 years.

Appointment Made For Non-Default Practitioner - displays a warning if an appointment is made with a practitioner other than the patient's default practitioner (set in the **General** tab of the patient file).

Show Email Practitioner option when cancelling appointments – displays a prompt to email a cancellation notice to the practitioner when deleting future appointments.

System Information - Appointment Book (Practitioners)

From the **Practitioners** tab you can change how you view your practitioners on the Appointment Book. There are three different layouts to choose from.



Option 1: Show All Practitioners
This gives you the option to display **Practitioner** and **Practice Group** tabs in the Appointment Book.

Option 2: Show specific Practice Group only
This option will set up the appointment book with only one **Specific Practice Group.** This will show all the practitioners who are members of that specific group with tabs at the bottom of the Appointment Book.

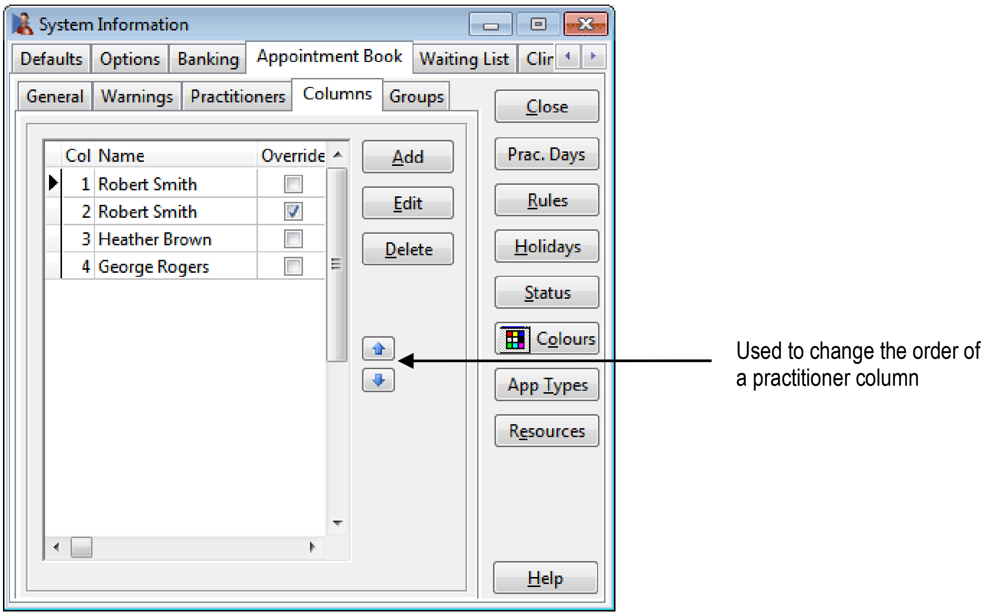
Option 3: Show specific Practitioner only
If you want just one **Practitioner** to appear on the appointment book, select the **Specific Practitioner** option. This view will only show the practitioner that you select. No tabs will appear on the Appointment Book with this selection.

If you choose to select none of the above options, then the appointment book will show all practitioners but no tabs at the bottom of the appointment book. In this case you will not have the choice of viewing one practitioner's columns.

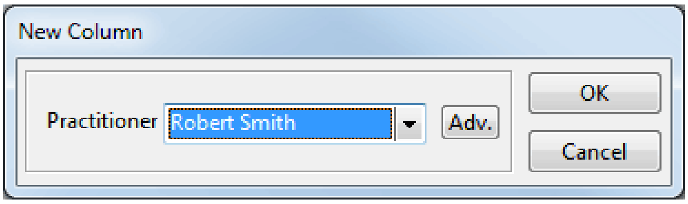
Front Desk 2017 - Note
In a multi-user networked environment these options need to be set on each computer. This allows the flexibility of different views of the appointment book on different computers in different areas of your practice.

System Information - Appointment Book (Columns)

Each practitioner may have one or more columns in the Appointment Book. To insert a column for a practitioner simply select the **Column** tab and click **Add**.



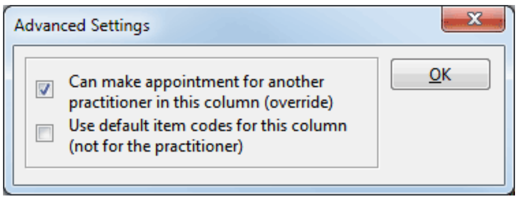
Select the practitioner's name from the drop-down box and click **OK**.



Generally only appointments for a particular practitioner can be made in an appointment column, however it is possible to override a column to allow appointments to be booked under any active practitioner, rather than just for the practitioner to whom the appointment column belongs.

To override a column, click the **Adv.** button and tick **Can make appointment for another practitioner in this column (override)** and click **OK**.

To use the default item codes for the column and not practitioner select **Use default item codes for this column (not for the practitioner)**.

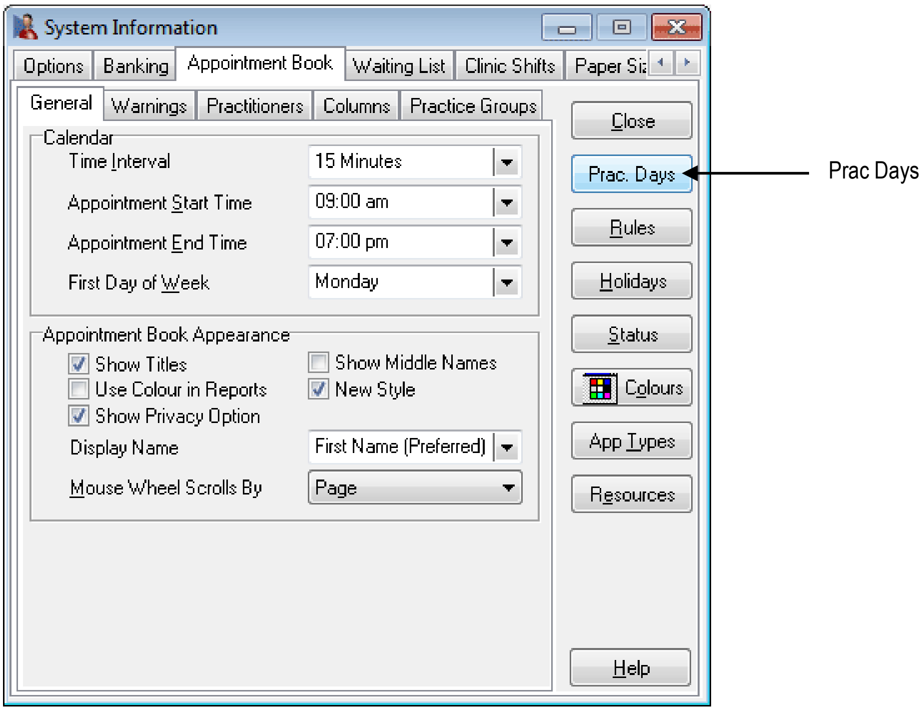


Use the up and down arrows to change the order of the practitioner columns.

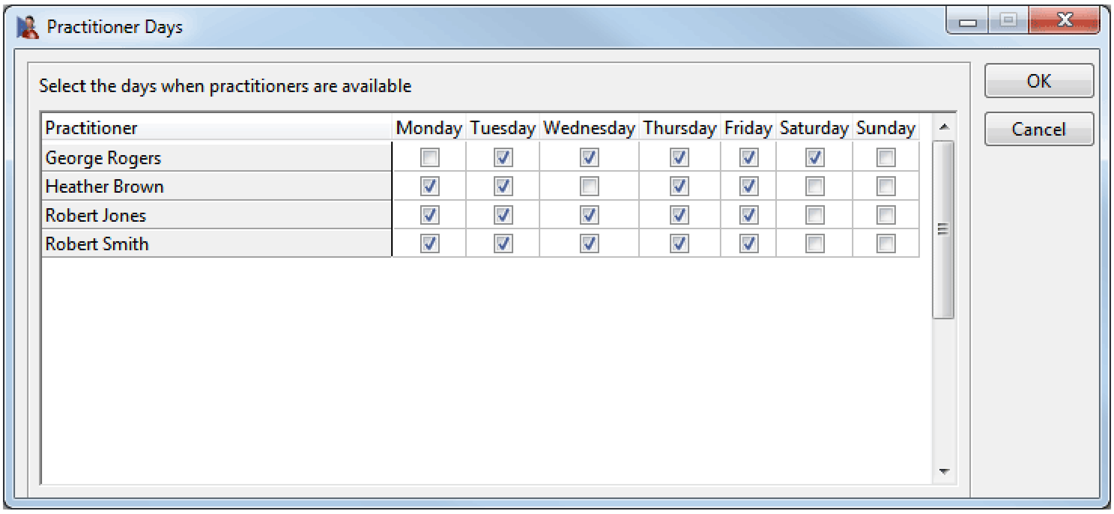
System Information - Appointment Book (Prac Days)

Practitioner Days allows users to hide practitioner columns in the Appointment Book for days when a practitioner is not available.

To disable an appointment book column for a practitioner, go to the **Appointment Book** tab in **System Information** and click the **Prac. Days** button.



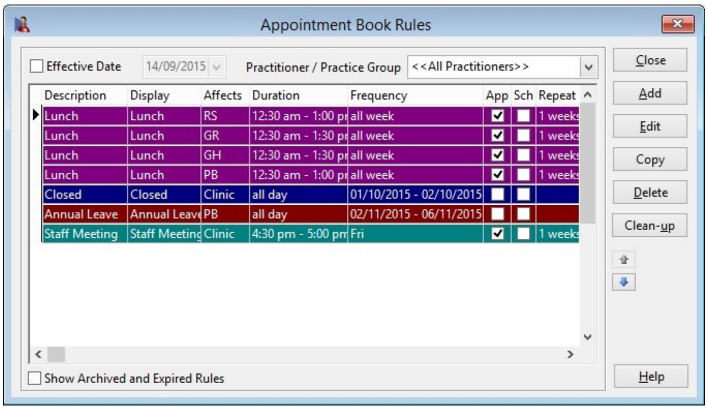
The following screen will be displayed. Select the days when each practitioner is available and click **OK**.



If a change is made to **Practitioner Days** while the appointment book is open, a message will be displayed and the Appointment Book will be closed and then reopened.

System Information - Appointment Book (Rules)

To shade out different times in the Appointment Book to indicate special periods, click the **Rules** button. The **Appointment Book Rules** dialog will appear, as shown below.



Rules can be used to indicate lunch breaks, practitioner breaks, holidays or periods where you wish to have special appointments, such as for new patients.

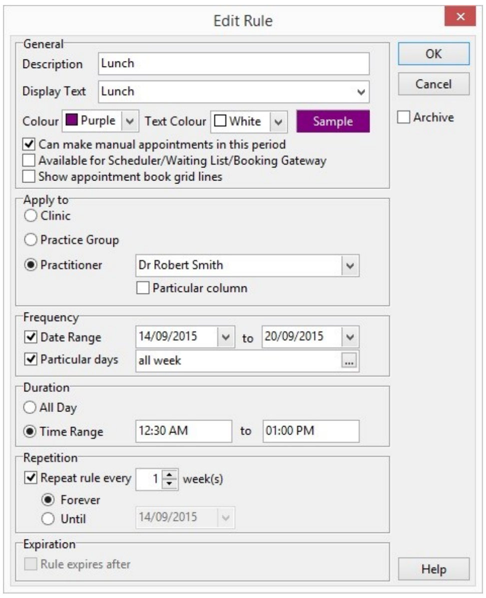
To **Add**, **Edit**, **Delete** or **Copy** a rule, click the corresponding button.
The **Clean-up** feature allows users to expire all rules which ended more than one

week ago. These rules will then be hidden, but can be accessed by selecting **Show Archived and Expired Rules**.

Front Desk 2017 - Note

Rules can overlap within the Appointment Book. The order in which the rules are entered in the **Appointment Book Rules** dialog determines the precedence or order in which they appear on the appointment book, with some rules overriding other rules. To edit the order, select the rule and use the up and down arrows to move a rule.

To create a new Rule, click **Add**. The **Add Rule** dialog will appear, as shown below.



System Information - Appointment Book (Rules)

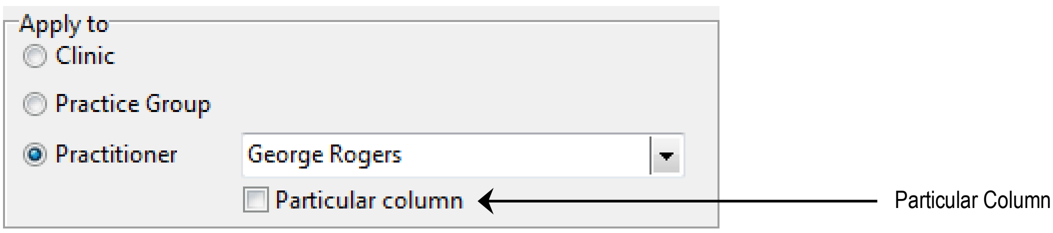
Enter a description of the rule in the **Description** field, and the text to be displayed (if any) in the **Display Text** field.

Select a **Colour** and **Text Colour** for the rule from the drop-down boxes provided. To select a colour from the **Windows Colour Palette** double click on the Colour or Text Colour field. The following **Colour** dialog will be presented.

If making an appointment is permitted within a rule area, select **Can make manual appointments in this period**. If the Appointment Scheduler, Waiting List and Patient Booking Gateway are permitted to schedule appointments within the rule area select **Available for Scheduler/Waiting List/Booking Gateway**.

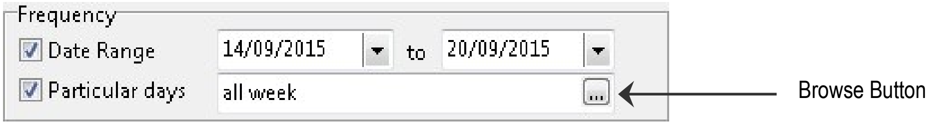
Show Appointment Book Grid Lines adds grid lines to areas blocked out by Appointment Book rules. This feature is useful if appointments are to be made within appointment rules, such as when reserving areas for new patients.

If the rule applies to all practitioners, select the **Clinic** option. Alternatively, if the rule only applies to a particular practice group, select the **Practice Group** option and from the drop-down box select the appropriate practice group. The same applies if the rule applies to a particular practitioner, select the **Practitioner** option and from the drop-down box select the appropriate practitioner. If the rule only applies to one column for a practitioner, check the **Particular column** option and specify the column number.

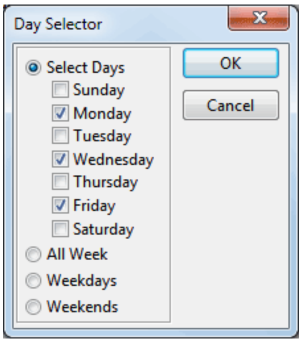


System Information - Appointment Book (Rules)

In the **Frequency** section select the time period for which the rule applies. Either select the **Date Range** option with an appropriate from and to date or if the rule only applies to certain days, select the **Particular Days** option as shown below and using the browse button select the required days.



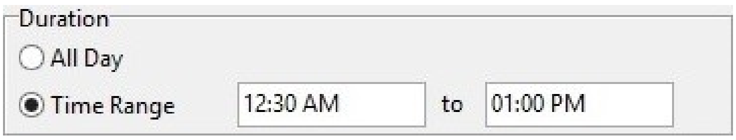
The **Day Selector** dialog will be displayed as below.



Select the days to which the rule applies and then click the **OK** button.

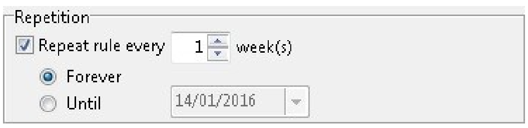
You can specify a date range as well as the days of the week. For example, if a practitioner was unavailable every Monday for the next 6 months, this can be set in the **Frequency** section.

From the **Duration** section select the **All Day** option, or alternatively if the rule applies to a particular time of the day select the **Time Range** option and set the appropriate **from** and **to** times.



The **Repetition** section will only be enabled if the **Date Range** section option is selected. This section is used to repeat rules on alternate weeks.

Example: If a practitioner only works every second Saturday, set the **From** and **To** dates in the **Date Range** for the week the rule first applies. From the **Repetition** section select **Repeat Rule** every **2 weeks**. Select the **Forever** or **Until** option, whichever applies.



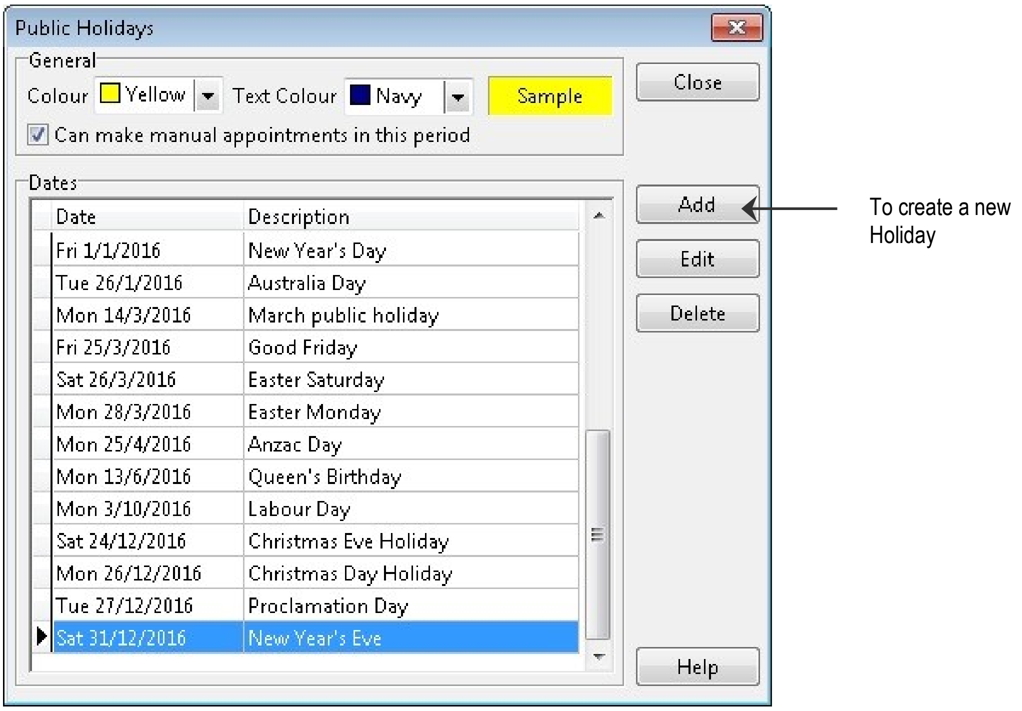
The **Expiration** section allows users to select a date for the rule to automatically become archived. This option is unavailable if the rule is set to repeat forever.

System Information - Appointment Book (Public Holidays)

To rule out times in the Appointment Book to indicate public holidays, go to the **Appointment Book** tab in **System Information** and click the **Holidays** button. The **Public Holidays** dialog will appear, as shown below.

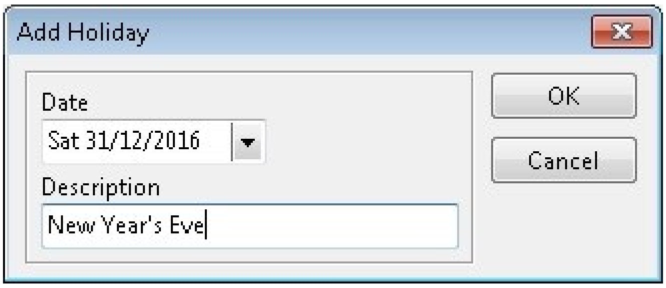
Select the **Colour** and **Text Colour** for the appearance of holidays in the appointment book. If making an appointment is permitted within a holiday period, select **Can make manual appointments in this period**.

To **Add**, **Edit** or **Delete** a public holiday, click the corresponding button.



To create a new public holiday, click **Add**. The **Add Holiday** dialog will appear, as below.

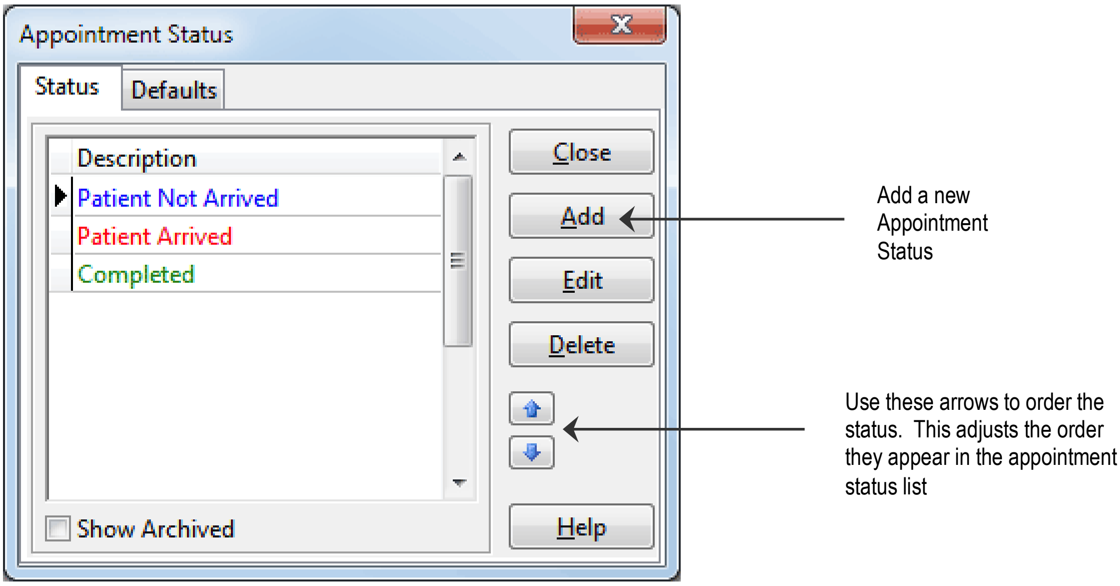
Enter the **Description** and **Date** for the holiday.



System Information - Appointment Book (Appointment Status)

To set up an appointment status, click the **Status** button. An appointment status can be used to view the progress of an appointment e.g. *Patient Not Arrived, Patient Arrived, In Room,* and *Completed.* It can also be set by a patient responding to an SMS appointment reminder.

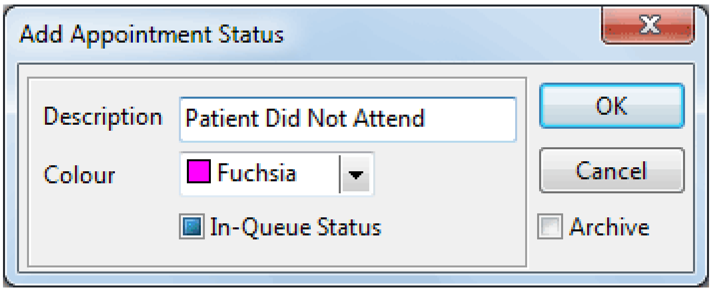
To **Add**, **Edit** or **Delete** an appointment status, go the **Appointment Book** tab in **System Information** and click the **Status** button.



To adjust the order an appointment status appears in the list, use the up and down arrows as above.

To create a new appointment status, click **Add**.

The **Add Appointment Status** dialog will appear.

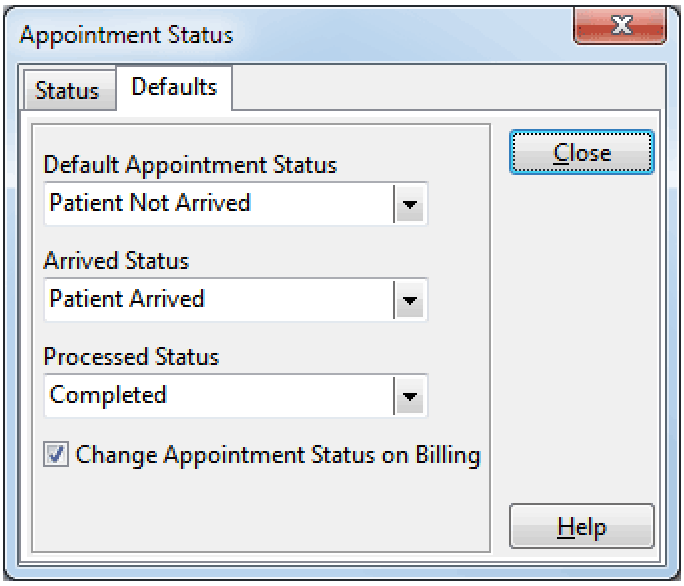


Enter the **Description** and **Colour** for the appointment status.

Enabling the **In-Queue Status** option will add the patient to the **Practitioner Queue** when this appointment status is selected on an appointment. The Practitioner Queue allows a practitioner to view patients that have arrived and are waiting to be seen.

System Information - Appointment Book (Appointment Status)

The **Defaults** section allows for a default appointment status to be set. These defaults ensure that the correct status is selected from the initial booking to the final processing of a patient after their consultation.

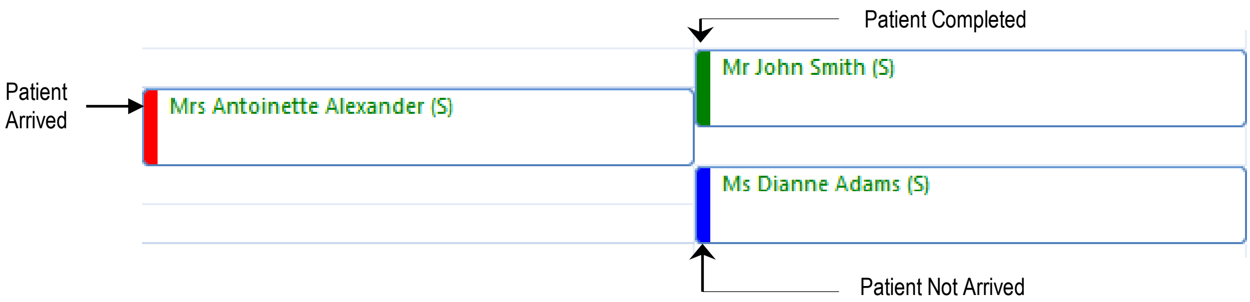


Use the drop-down boxes on this screen to set the default statuses.

- **Default Appointment Status** is the status automatically selected when an appointment is made.
- **Arrived Status** is the status that flags when a patient has arrived and starts the patient waiting timer.
- **Processed Status** is the status that is automatically set when the patient is billed.

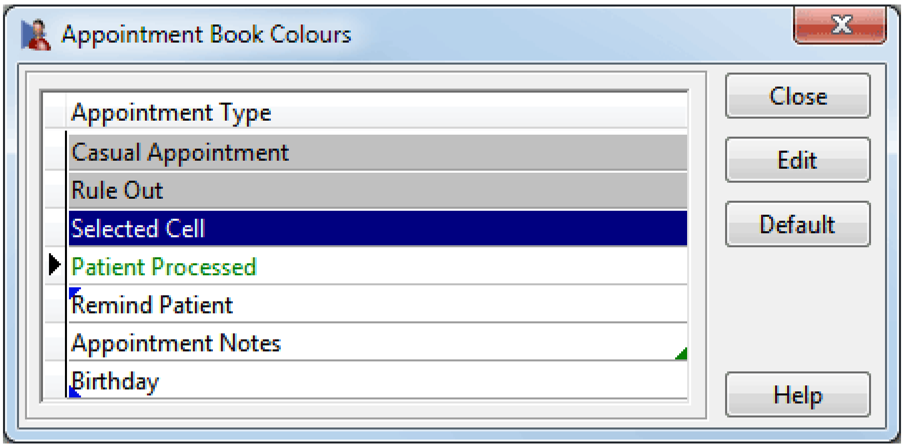
Select **Change Appointment Status on Billing** if the appointment status should change automatically when the patient is billed.

The coloured bar on the left of each appointment indicates the appointment status.

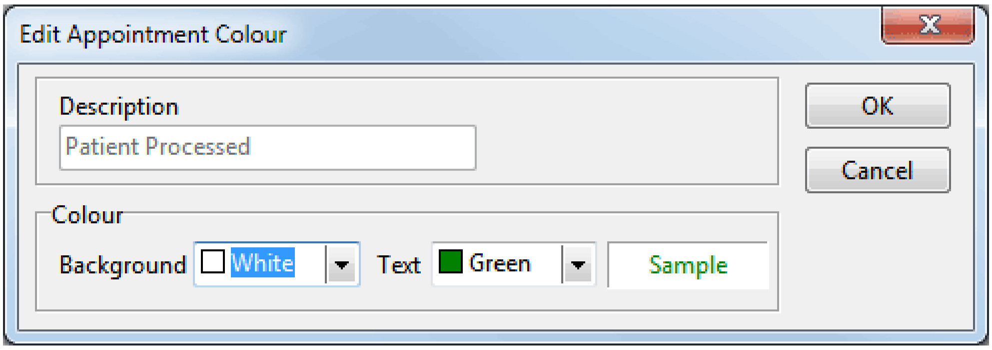


System Information - Appointment Book (Colours)

To change the colour of the common features in the appointment book, click the **Colours** button. The following **Appointment Book Colours** dialog will be displayed.



Select the Appointment Book colour you would like to change and click the **Edit** button, or simply double click on the item. The following **Edit Appointment Colour** dialog will appear.

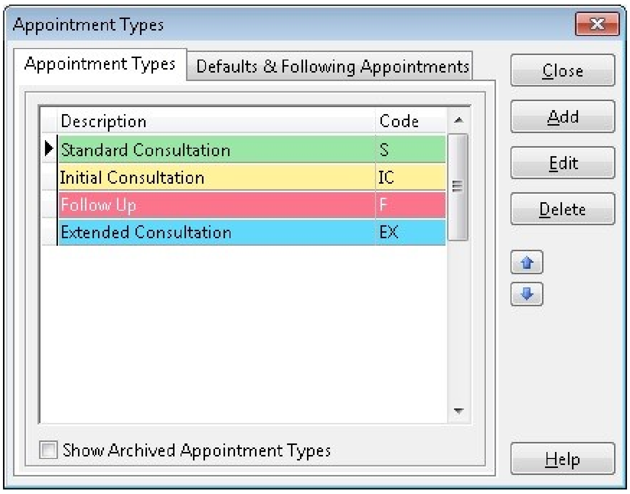


You can change both the **Background** colour and **Text** colour of these items using the drop-down boxes. When you have chosen the desired colours click **OK**. As with the rules function, double click on the Colour and Text Colour fields to select a colour from the **Windows Colour Palette**.

System Information - Appointment Book (Types)

To set up Appointment Types, click the **App Types** button. Appointment Types can be used to indicate the reason a patient is attending e.g. a New Patient, an X-ray, or a regular treatment. An appointment type could also indicate the room in which the treatment will take place.

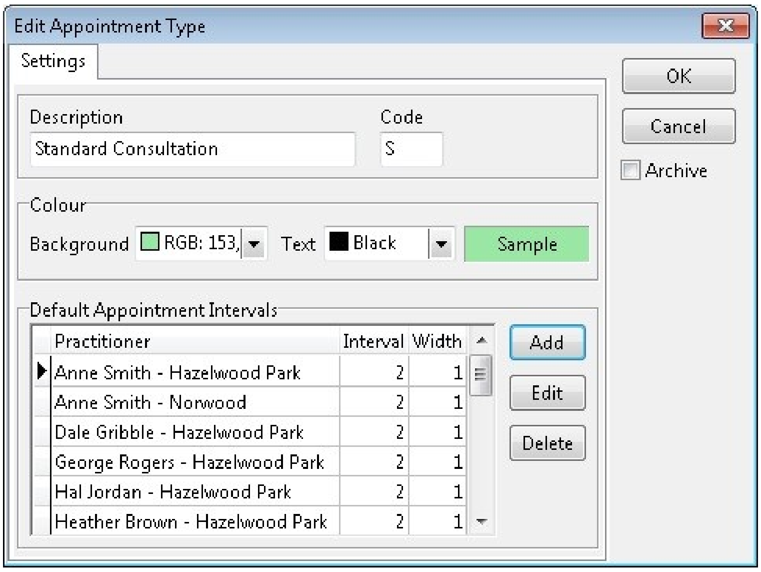
Do not confuse Appointment Types with Item Codes; Appointment Types are intended to enhance the readability of the Appointment Book, whereas an Item Code is used for billing purposes.



Click **Add** to create an Appointment Type. To change an Appointment Type, click **Edit** and to remove an Appointment Type click **Delete**.

To adjust the order in which Appointment Types appear, use the up and down ordering buttons.

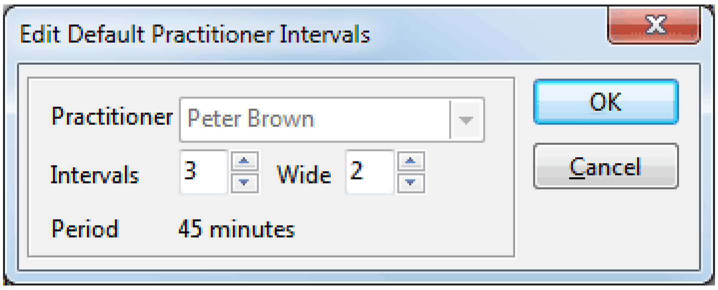
Enter a **Description** and a **Code**, this code can be up to 3 characters in length and will appear in brackets alongside the patient's name. Select a **Background colour** and a **Text colour** from the drop-down boxes.



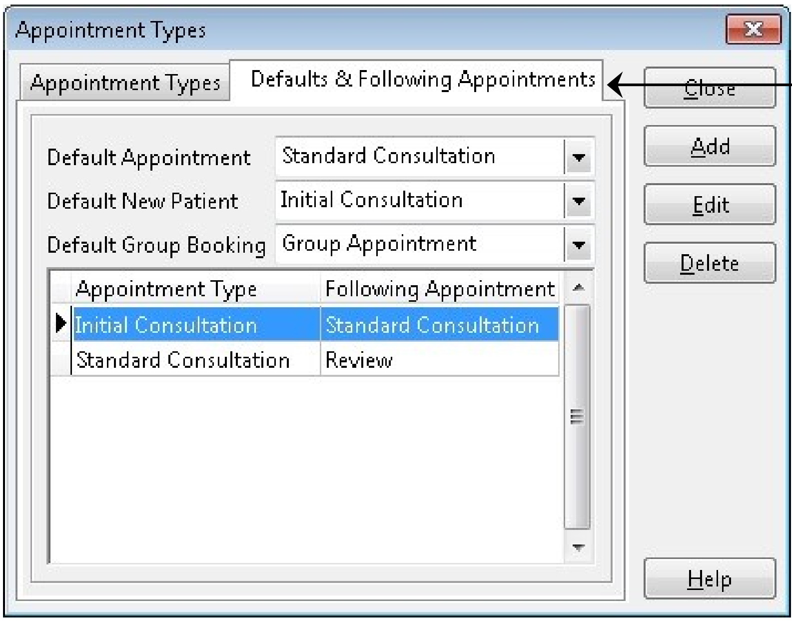
System Information - Appointment Book (Types)

Default Practitioner Intervals allow for appointments to default to a certain time interval required for that appointment. For example, New Patients may require two intervals.

To set these time intervals click the **Add** button and either select a practitioner from the list or leave it as **All Practitioners**. Set the time intervals as necessary for a particular appointment type for a practitioner or all practitioners. The wide option only applies to those practitioners who have more than one column, and sets the appointment for more columns.



Select the **Defaults & Following Appointments** tab.



Default settings for Appointment Types

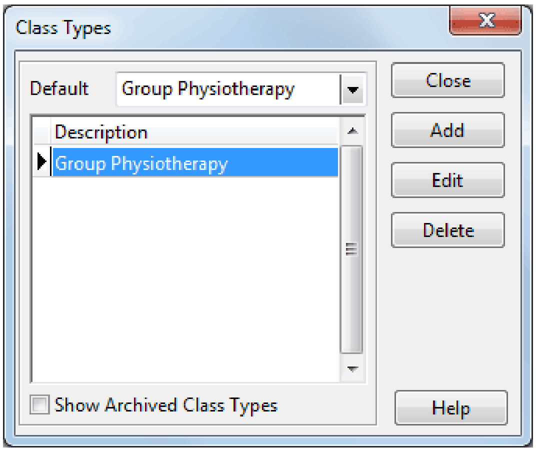
This function allows you to automatically set up appointment types for subsequent appointments, based on the appointment type of a previous appointment. For example, this function can automatically change the appointment type from **Initial Consultation** to **Standard Consultation**, then from **Standard Consultation** to **Review** and so on.

The **Default Appointment**, **Default New Patient** and **Default Group Booking** should be set to the appointment types that are most commonly used for these appointments.

To **Add**, **Edit** or **Delete** a following appointment, click the corresponding button.

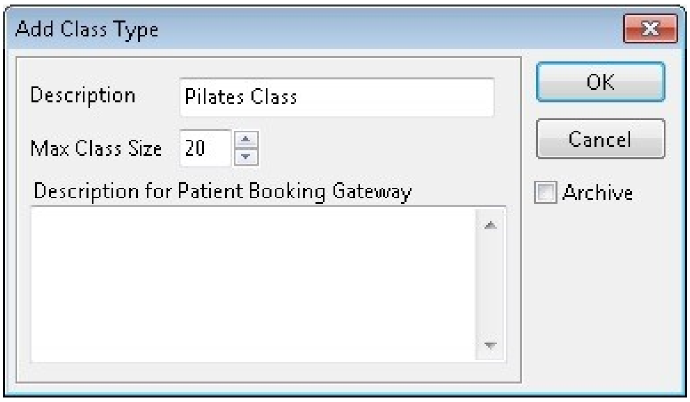
System Information - Appointment Book (Classes)

To set up Class Types, click the **Class Types** button. Class Types can be used to differentiate between **Group Appointments**, while also allowing a maximum number of attending patients to be set.



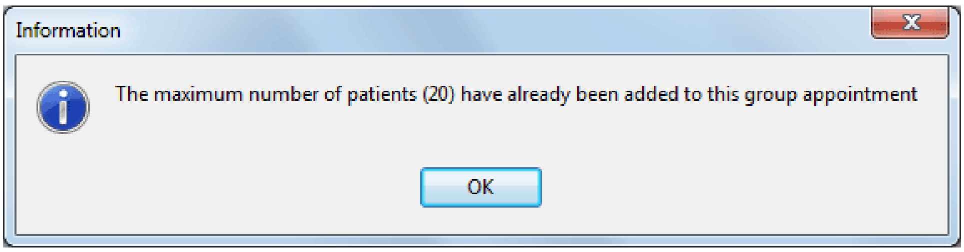
Click **Add** to create a Class Type.

To edit or delete select the class type and click **Edit** or **Delete**.



Enter a **Description** and select the **Max Class Size** to determine the maximum number of patients that can be booked into this class type.

When the class size is exceeded a warning will appear at the time of booking.



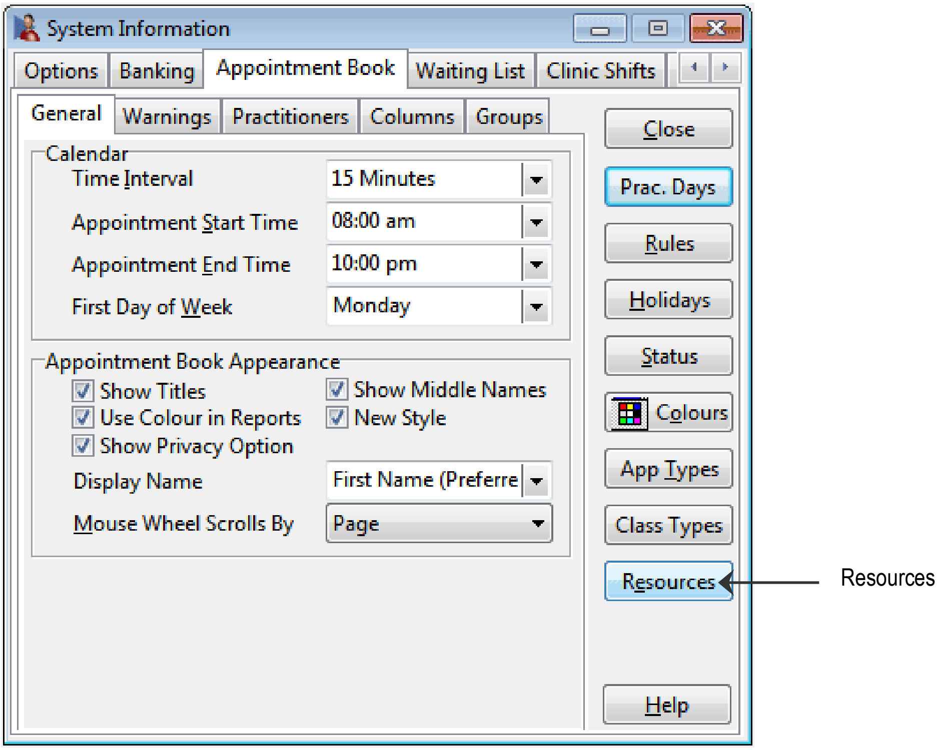
A **Description for Patient Booking Gateway** can also be added, which will be displayed to users booking into this class via the Booking Gateway.

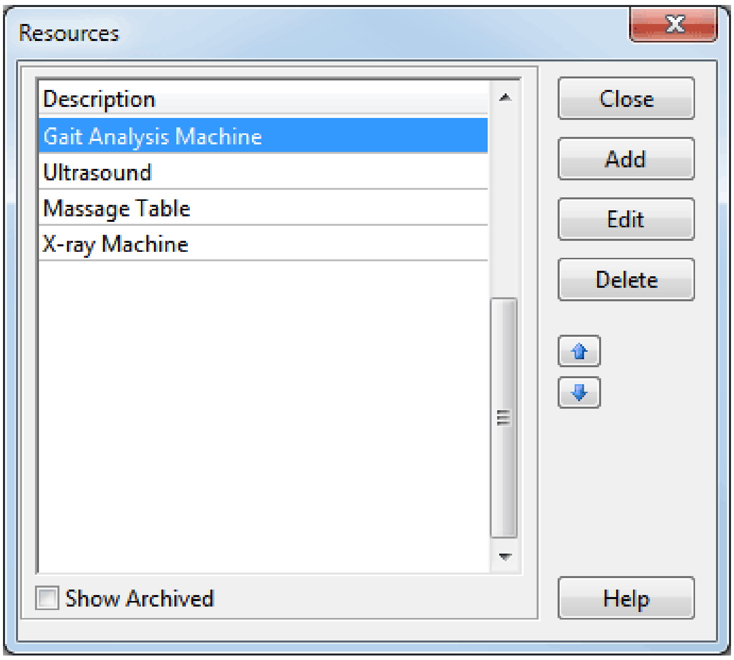
Default Class Types can be specified within each individual practitioner file.

System Information - Appointment Book (Resources)

A resource can be a piece of equipment, a room, an assistant or anything else you wish to reserve for a particular appointment. Examples include: X-ray machine, ultrasound or room A. Once a resource is associated with an appointment, it is unavailable, preventing the double-booking of a finite resource.

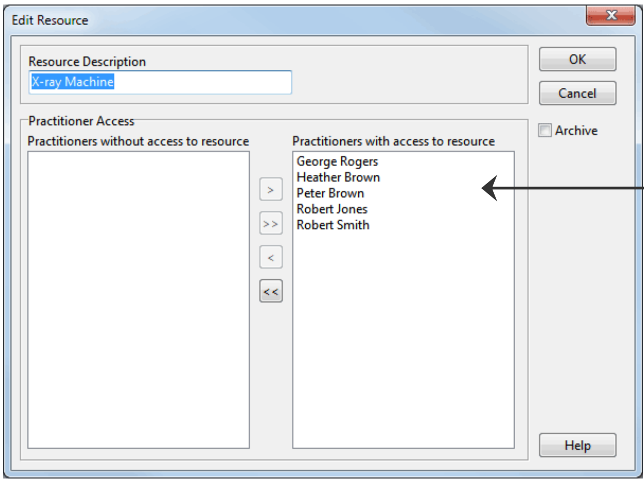
To add or edit a Resource, click the **Resources** button on the **Appointment Book** tab in **System Information.**





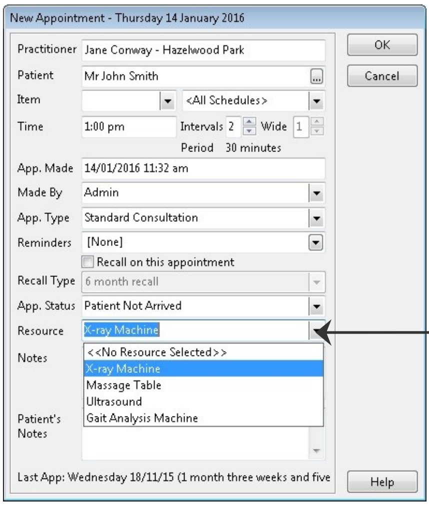
System Information - Appointment Book (Resources)

By default, resources are available to all practitioners. However, resource use can be restricted to only certain practitioners.



Select which Practitioners have access to this Resource

To add a resource to an appointment, select the **Resource** from the drop-down list when creating an appointment or editing appointment details.



Select **Resource**

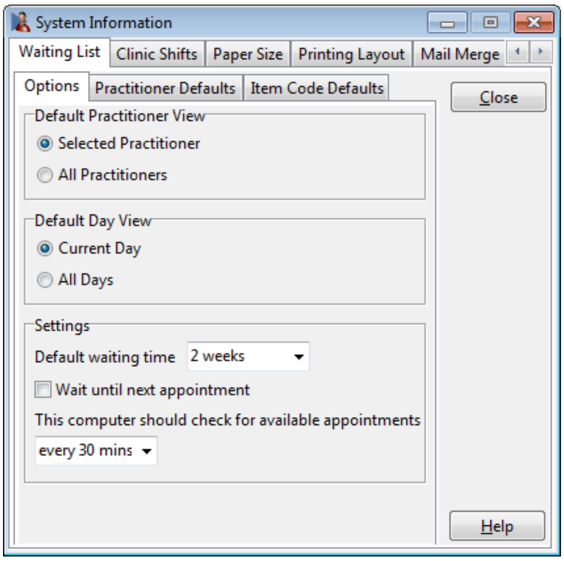
If you hover over an appointment with your mouse, an appointment tooltip will show the resource selected for that appointment, as well as the other appointment details.

Selected **Resource**

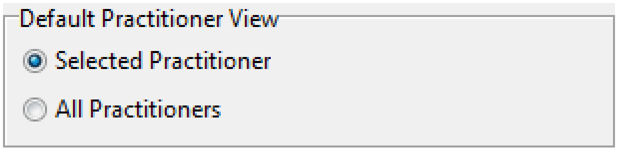
Resources will also be shown on the **Day List** report.

System Information - Waiting List

Select the **Waiting List** tab from the **System Information** dialog.



Under the **Options** tab, select the preferred **Default Practitioner View**:



Selected Practitioner will default to showing waiting patients with the selected practitioner only.

All Practitioners will default the waiting list to show waiting patients with all practitioners.

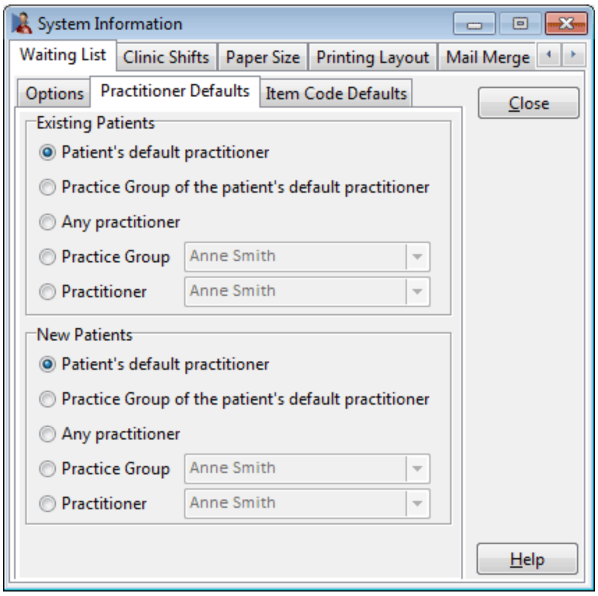
Select the preferred **Default Day View**:

Current Day will default to showing only patients waiting for an appointment on the selected calendar day.

All Days will default the waiting list to show patients waiting for an appointment on any day.

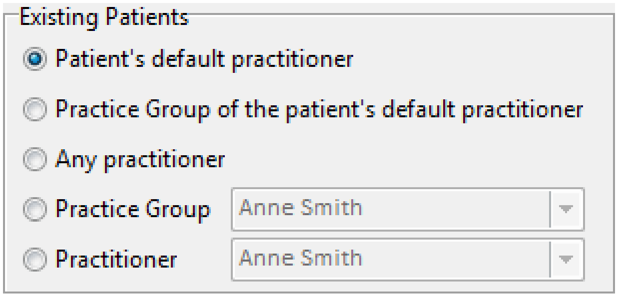
System Information - Waiting List

Select the **Practitioner Defaults** tab from within the **Waiting List** tab.



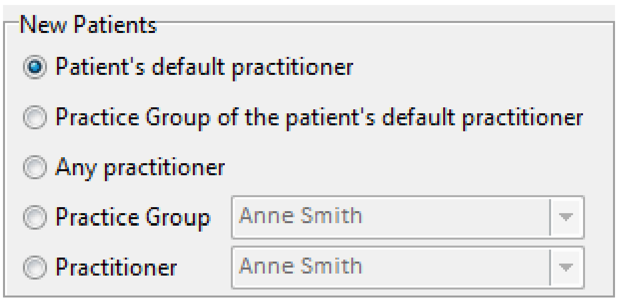
Select the preferred **Practitioner Defaults** for **Existing Patients.**

This will be the practitioner selected by default when an *existing* patient is being added to the waiting list.



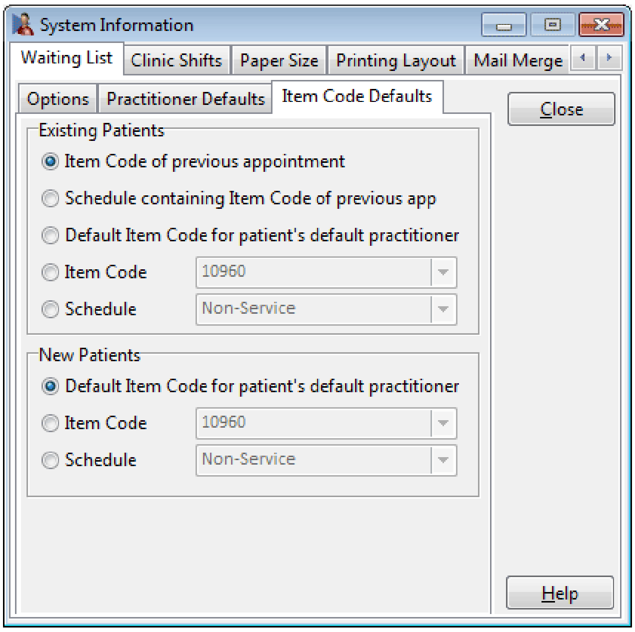
Select the preferred **Practitioner Defaults** for **New Patients.**

This will be the practitioner selected by default when a *new* patient is being added to the waiting list.

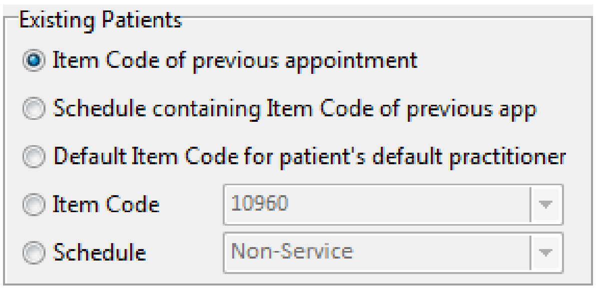


System Information - Waiting List

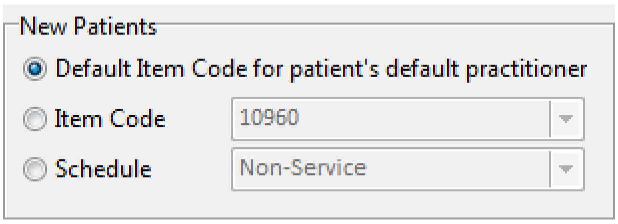
Select the **Item Code Defaults** tab from within the **Waiting List** tab.



Select the preferred **Item Code Defaults** to be used when an *existing* patient is added to the waiting list.

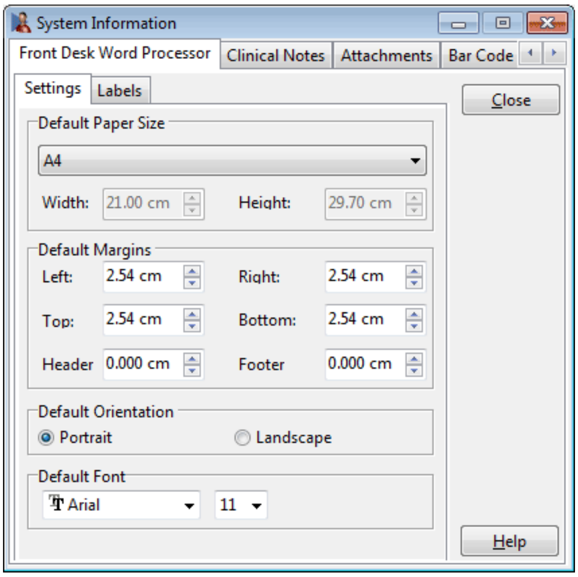


Select the preferred **Item Code Defaults** to be used when a *new* patient is added to the waiting list.



System Information - Front Desk Word Processor

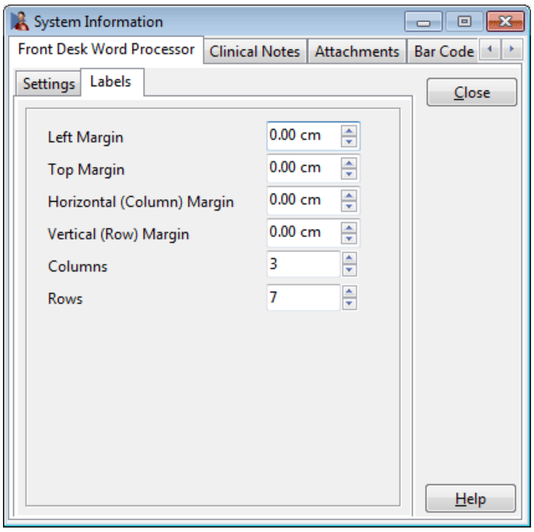
Select the **Front Desk Word Processor** tab from the **System Information** dialog.



The default document settings in the **Front Desk Word Processor** can be customised by setting the available options.

Users can select the **Default Paper Size**, **Default Margins**, **Default Orientation** and the **Default Font**. These settings are often set based on your printer configuration and most commonly used documents.

Select the **Labels** tab from within the **Front Desk Word Processor** settings.

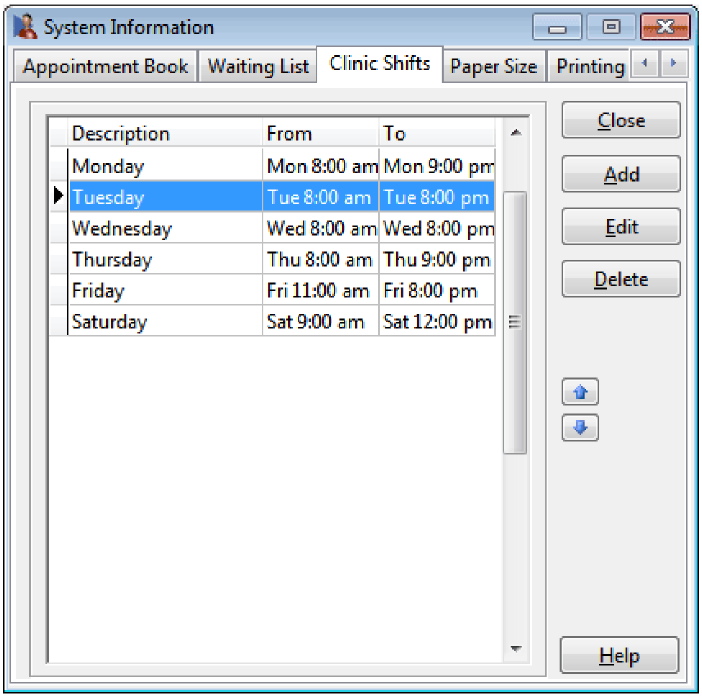


Select the **Margins** required when printing labels through the **Front Desk Word Processor.**

The number of **Columns** and **Rows** is determined by the layout of the label sheets being used.

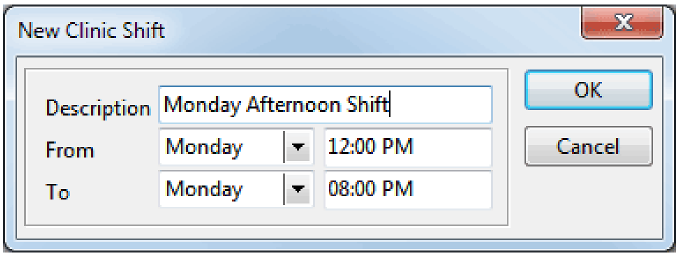
System Information - Clinic Shifts

Select the **Clinic Shifts** tab from the **System Information** dialog.



Clinic Shifts are common working shift periods and banking periods used for reporting. Once established, these shifts are used to define time periods when generating reports. Each of these periods require a description together with a start and end time.

To create a new clinic shift, click the **Add** button and enter the details as required.



When setting start and end times, allow for the occasional patient being processed before opening or after closing the shift. Also be careful that shifts do not overlap.

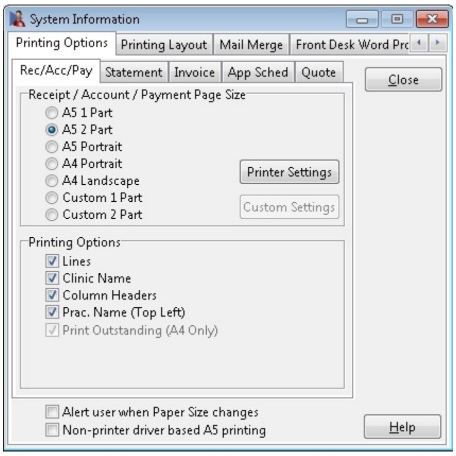
To edit an existing period either double click on the item in the grid or click the **Edit** button. Items may be removed by clicking the **Delete** button.

Front Desk 2017 - Tip

Front Desk 2017 can automatically synchronise a computers time to the same time as the database server by using the Set Time of this machine from Database Server feature on the **Network** tab in **System Information**.

System Information – Printing Options

Select the **Printing Options** tab from the **System Information** dialog.



In this section you can modify the size and appearance of Statements, Invoices, Quotations, Receipts, Accounts, Payments and the Appointment Schedule. The lines, clinic name and headers may be removed to accommodate pre-printed stationery.

Receipts, Accounts and Payments can be printed on either **A5 1 Part, A5 2 Part, A5 Portrait, A4 Portrait, A4 Landscape** or **Custom 1 Part, Custom 2 Part**. The **2 Part** option has a remittance slip for the patient to keep for their records. The A4 Receipts, Accounts and Payments have an option to display any outstanding amount at the bottom.

In the **Statement** tab there is an option to **Show Statement/Invoice Numbers**. If this is selected an invoice number will be printed on all statements, invoices and receipts. Additionally, **Credit Card details** or **Direct Deposit details** can be shown on all statements and/or invoices.

To show **BPAY Details** on statements and invoices check **BPAY Details** under the **Printing Options** section of the **Statement** and/or **Invoice** tab. When turning on this function for the first time, Front Desk will automatically generate BPAY Reference numbers for your existing patients.

If you have selected the **A4 Portrait Credit Card** option for your statements and/or invoices, you can click the **Advanced** button and tick the specific credit cards that your clinic accepts.

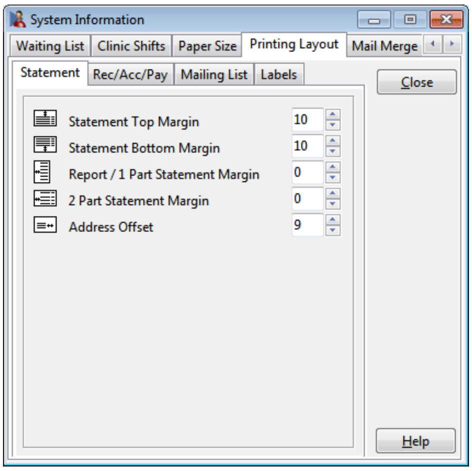
An **Appointment Schedule** details the future appointments for a patient. The appointment schedule may be printed on A4, A5, custom-sized paper or on business card sized labels, and may also include a calendar. Users can also select if they want the appointment type or practitioner name to be printed. These preferences can be set in the **App Schedule** tab.

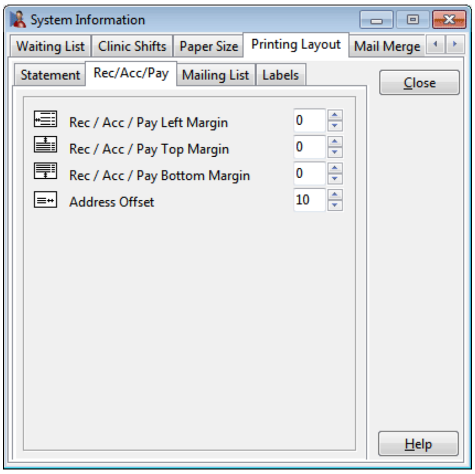
Alert user when Paper Size changes displays a message if the current item being printed uses a different paper size to the previous item printed.

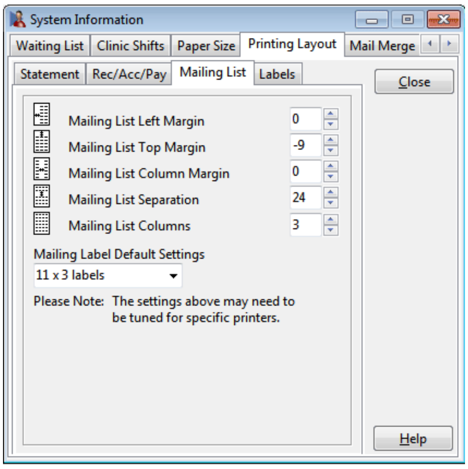
The **Non-printer driver based A5 printing** option can assist *Front Desk 2017* users who have a printer that does not fully support A5 printing.

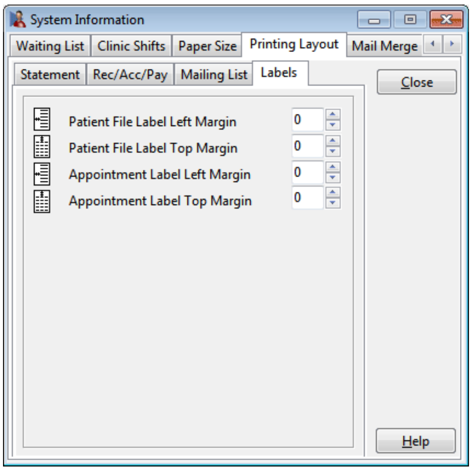
System Information - Printing Layout

Select the **Printing Layout** tab from the **System Information** dialog.









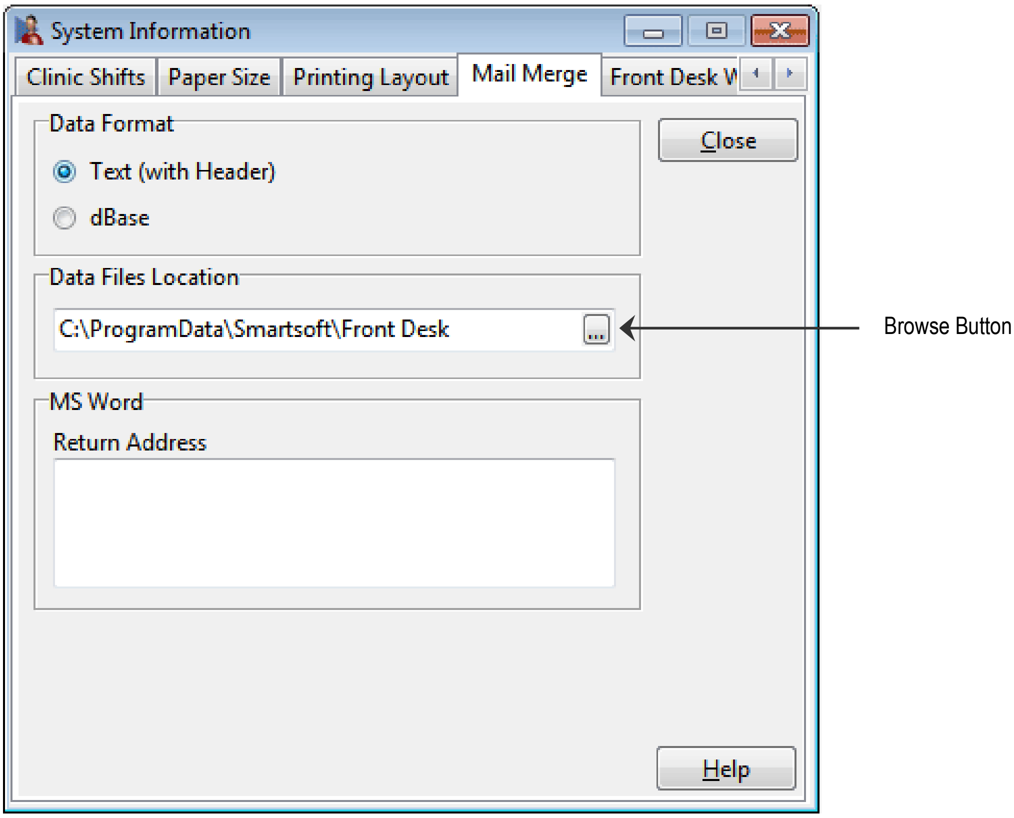
Printing layout accommodates minor changes to the printer alignment setup. Adjustments to the **Left Margin**, **Top Margin**, and **Bottom Margin** can be made for Statements, Invoices, Receipts, Accounts, Payments, Patient File labels and Appointment Labels. **Left Margin, Top margin, Column Margin**, **Separation** and the number of **Columns** can be adjusted for mailing labels. Some default settings have been included.

Front Desk 2017 - Tip

We recommend using A4 mailing labels with 3 columns across and 14 rows down. *Front Desk 2017* can accommodate most label sizes on A4 paper, however some mailing labels are designed specifically for ink jet or laser printers, so choose the labels that best suit your printer.

System Information - Mail Merge

Select the **Mail Merge** tab from the **System Information** dialog.



Front Desk 2017 is capable of generating mail merge data for use in Microsoft Word or within the **Front Desk Word Processor**.

By default, the format in which this data is saved is **Text (with Header)**. As the capabilities of computer systems vary the default **Data Format** may not be compatible with your system. If compatibility issues arise please select **dBase**.

The default save location of this data can be found below.

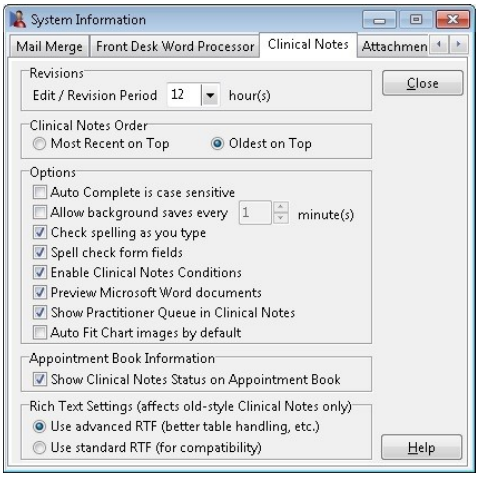
For Windows 7, Windows 8/8.1, Windows 10, Windows Server 2008, Windows Server 2008 (R2), Windows Server 2012, Windows Server 2012 (R2) and Windows Server 2016: **C:\ProgramData\Smartsoft\Front Desk**

If you wish to change the **Data File Location** click browse.

The **Return Address** section is used for printing the return address on envelopes that are set up within Standard Letters.

System Information - Clinical Notes

Select the **Clinical Notes** tab from the **System Information** dialog.



The **Edit / Revision Period** specifies the time period allowed for editing before a revision is created. This time period can be set from 0 to 12 hours.

The **Clinical Notes Order** determines the order of clinical notes records in a patients file. They can either be displayed **Most Recent on Top** or the **Oldest on Top**.

The **Auto Complete is Case Sensitive** option will only trigger an auto-complete line in clinical notes if the exact letter case is used in the replacement keywords.

Users can set how often clinical notes are automatically saved using **Allow background saves every x minute(s)**.

Check spelling as you type will automatically spell check while typing clinical notes.

Select **Spell check form fields** to have words entered in form fields automatically checked for spelling mistakes.

Enable Clinical Notes Conditions will toggle clinical notes conditions on or off.

Check **Preview Microsoft Word documents** to preview Microsoft Word documents within clinical notes.

Show Practitioner Queue in Clinical Notes will enable the practitioner queue within clinical notes.

Auto Fit Chart images by Default will automatically stretch chart images to the available area by default.

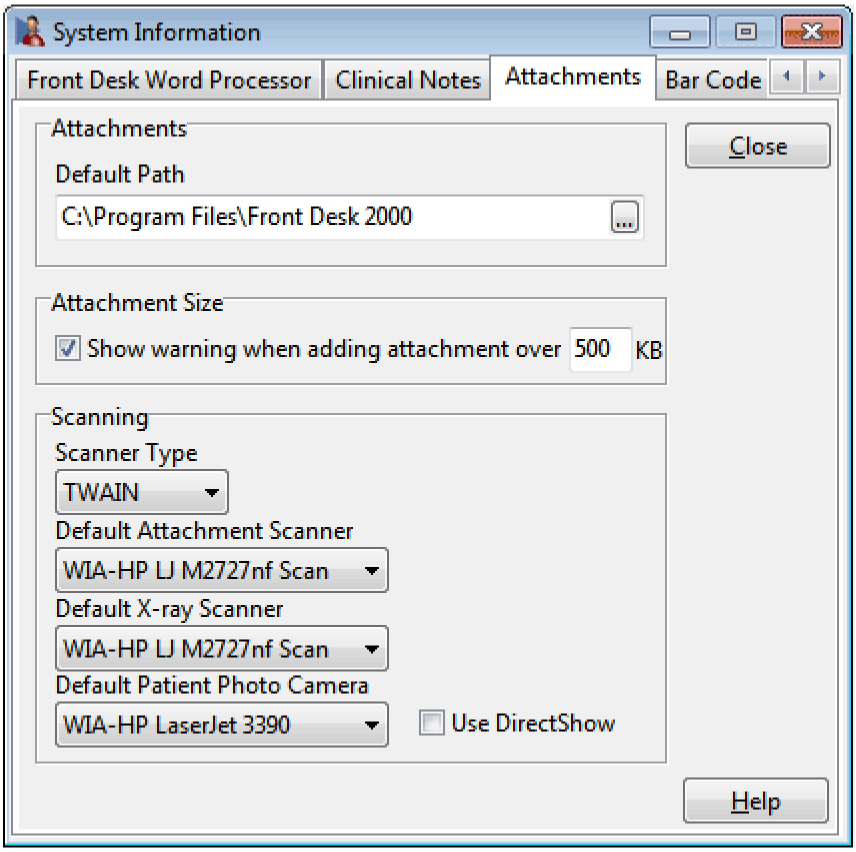
Selecting the **Show Clinical Notes Status on Appointment Book** enables users to view a list of patients who have not had a clinical note entered. This list is viewed by placing the mouse pointer over the practitioner's name on the Appointment Book.

The **Rich Text Settings** can be set to better handle tables within clinical notes (advanced RTF) or changed to standard RTF for users wishing to use voice recognition software or with other compatibility issues.

System Information - Attachments

The default settings for **Scanning** can be changed on the **Attachments** tab in **System Information**.

The **Default Attachment Scanner**, **Default X-ray Scanner** and **Default Patient Photo Camera** can be set as below.



The default folder for *Front Desk 2017* to look in when adding attachments can be set using the **Default Path** on the **Attachments** tab.

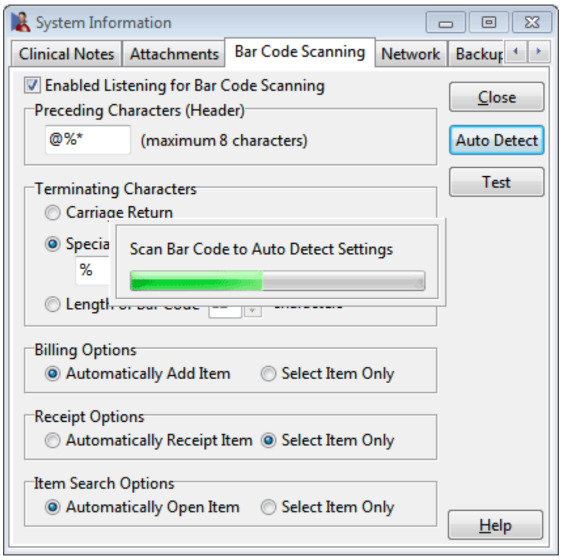
A warning on **Attachment Size** can be enabled by checking **Show warning when adding attachment over** a set size in KB (kilobytes). This will notify users if they are trying to add attachments over the selected size in the **Patient File**.

The Default Scanner and Camera settings can be set from this tab. If using a webcam to take patient photos, **Use DirectShow** must be ticked for Front Desk to find the webcam.

System Information - Bar Code Scanning

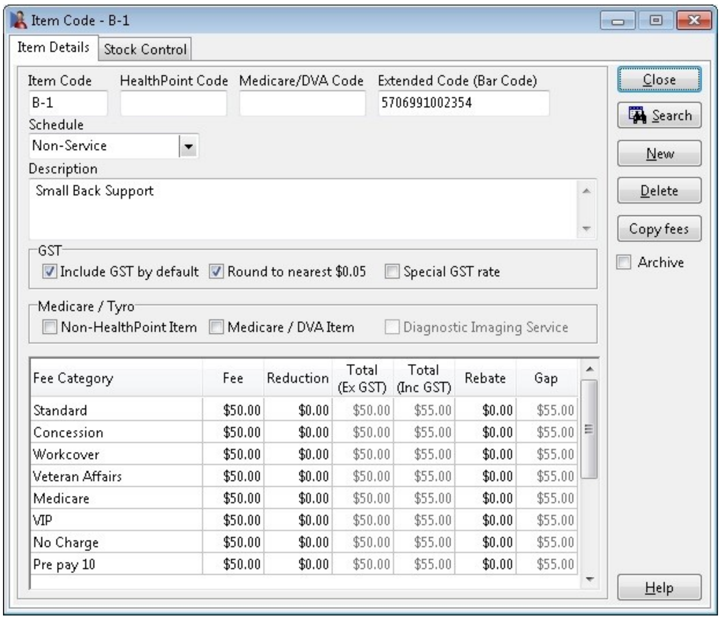
Select **Enable Bar Code Scanning** if you wish to use a bar code scanner for billing and/or receipting items.

Click **Auto Detect** and while the **Scan Bar Code to Auto Detect Settings** progress bar is displayed scan a test bar code and the bar code scanner's settings will automatically be read and set in *Front Desk 2017*.



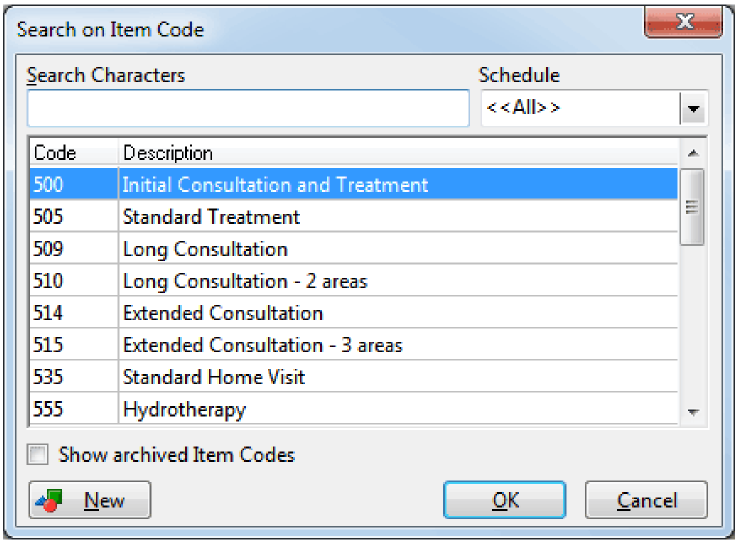
Select the **Billing Options**, **Receipt Options** and **Item Search Options** to be used when bar code scanning. You can select **Automatically Add Item on Billing**, **Automatically Receipt Item on Receipt**, **Automatically Open Item on Search** or **Select Item Only**.

To allocate a bar code to an item, open the individual Item Code in Front Desk and scan the corresponding product. The code will be placed in the **Extended Code (Bar Code)** field.



System Information - Bar Code Scanning

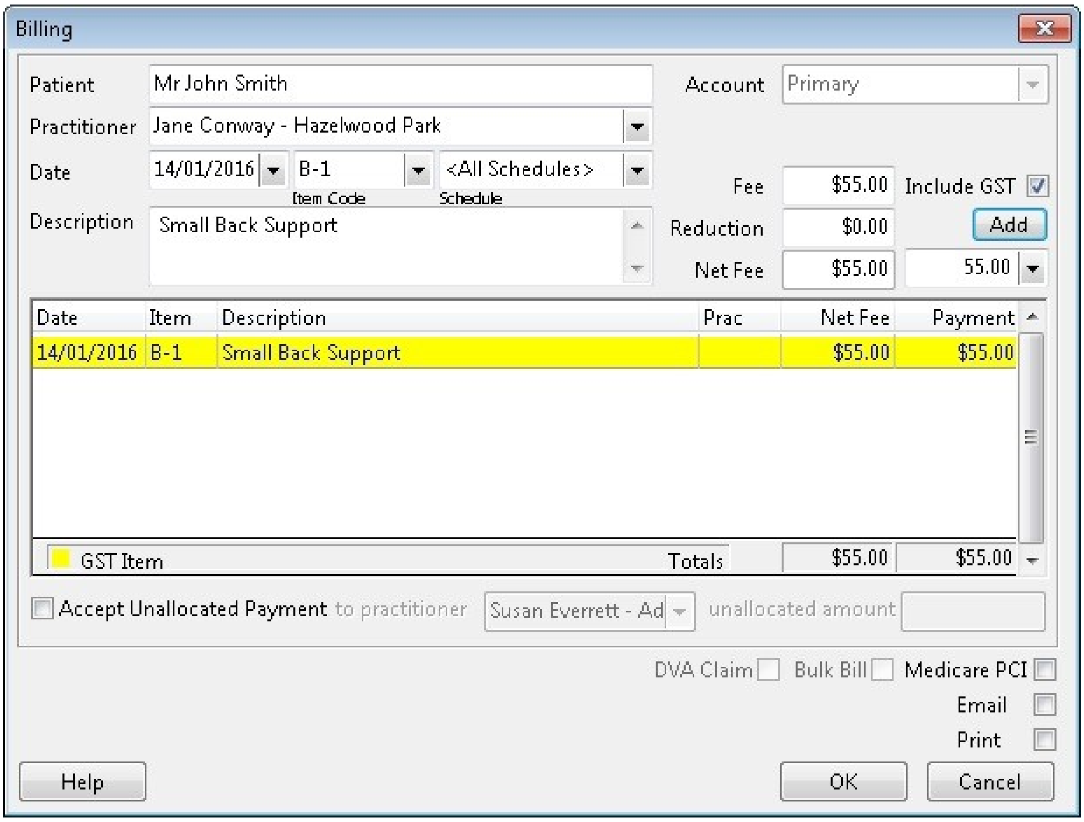
To use the bar code to search for an item code, scan the bar code in the **Search on Item Code** window. This will select and open the item code depending on the settings in **System Information - Bar Code Scanning**.



On the Receipt window scan the bar code you wish to receipt. This will either select and receipt this item or just select the item depending on the settings in **System Information - Bar Code Scanning**.

System Information - Bar Code Scanning

On the **Billing** window scan the bar code you wish to bill. This will either select and add the item or just select the item depending on the settings in **System Information - Bar Code Scanning**.

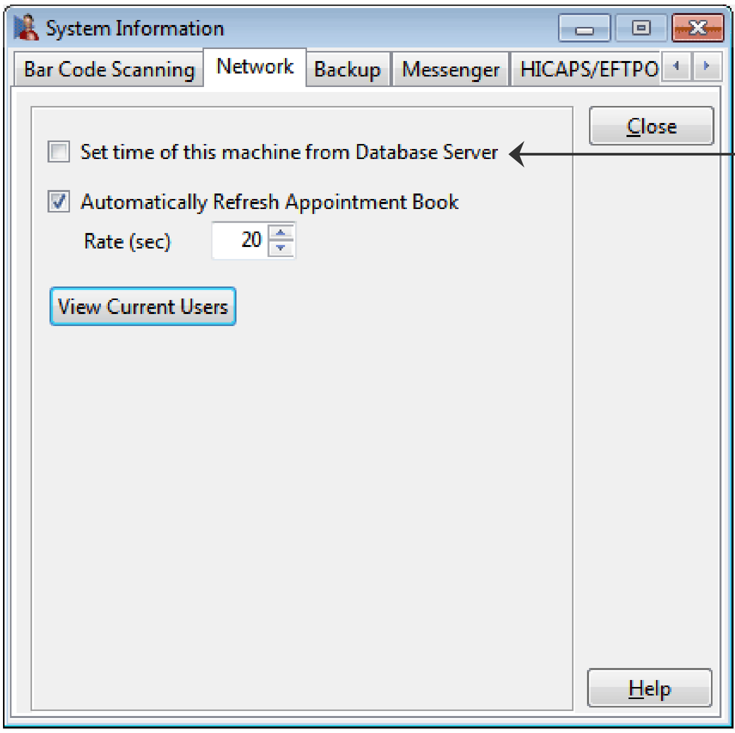


Front Desk 2017 - Tip

Your bar code scanner may need configuration for this functionality to work correctly. Please refer to the bar code scanner's manual for further details on configuring header and terminating characters.

System Information - Network

Select the **Network** tab from the **System Information** dialog.



To synchronise the date and time of all computers in a multi-user environment, select the **Set Time of this machine from Database Server** option

Only select the following settings if running *Front Desk 2017* in a multi-user networked environment.

Select **Set time of this machine from Database Server** if this computer is to be synchronised with the server. This date and time synchronisation is performed when starting *Front Desk 2017* on your machine.

Automatically Refresh Appointment Book refreshes the Appointment Book on a regular basis so that it reflects the changes made by other users in a multi-user networked environment. This option is not required for single user operation.

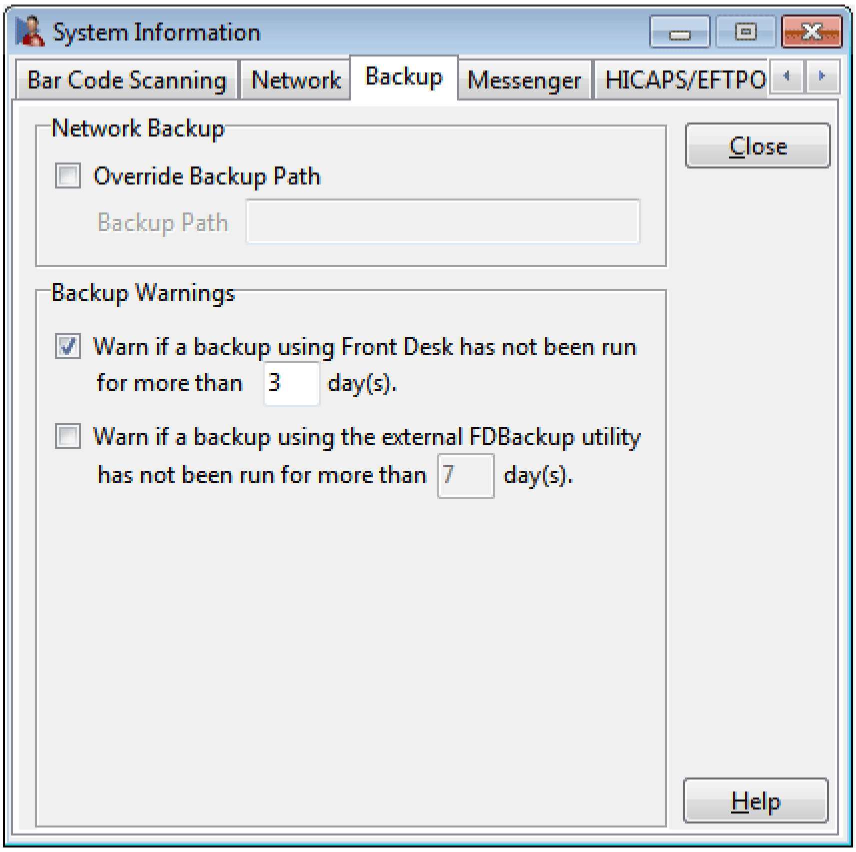
View Current Users will show the computers and logins currently connected to the *Front Desk 2017* database.

Front Desk 2017 - Tip

It is important that the time in your system is set to the correct date and time for the banking and shift reports to work correctly. If running *Front Desk 2017* in a multi-user environment, each computer running *Front Desk 2017* should be set to the same date and time. Front Desk 2017 can automatically synchronise a computers time to the same time as the server by using the **Set time of this machine from Database Server** feature (as above).

System Information - Backup

Select the **Backup** tab from the **System Information** dialog.



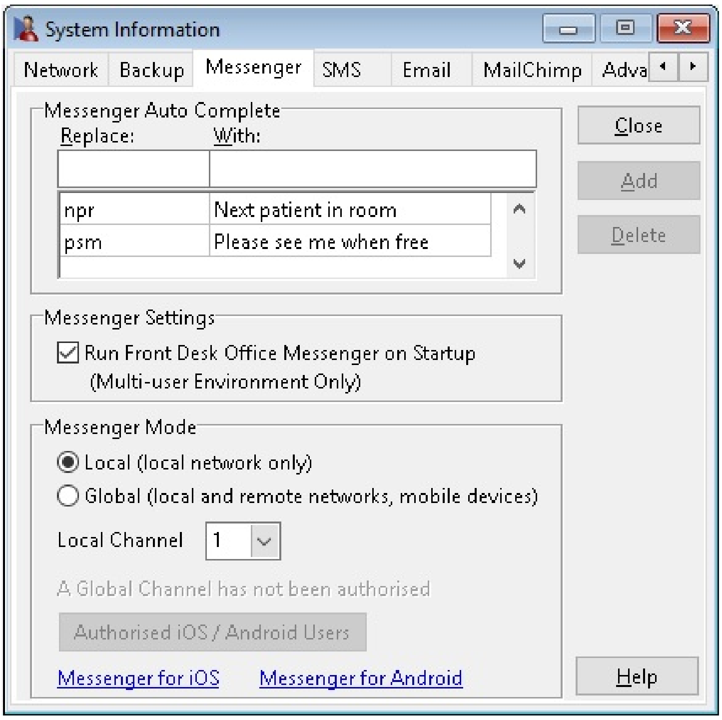
Override Backup Path is set when backing up from a client workstation, over a network in a multi-user environment. UNC format must be used when setting the backup path. Please contact Smartsoft (Australia) Pty Ltd if you require further assistance with this feature.

Warn if a backup using Front Desk has not been run for more than 3 day(s) can be configured to display a warning if a manual backup has not been performed for a specific, user-defined number of days.

Warn if a backup using the external FDBackup utility has not been run for more than 7 day(s) can be configured to display a warning if the automated backup utility has not been performed for a specific, user-defined number of days. Please contact Smartsoft (Australia) Pty Ltd if you require further assistance with this feature.

System Information - Messenger (multi user environments only)

Messenger users can use auto complete for commonly used words and phrases. For example, users can set up a shortcut such as “npr” which will expand to “Next patient in room”.



To add new shortcuts, enter the shortcut you wish to use with the corresponding text, and then click the **Add** button.

When next using Front Desk Messenger, users can enter the shortcut and when they press the space bar the extended text will appear.

Front Desk Messenger can allow communication between practices on separate networks by setting the **Messenger Mode** to **Global**. This functionality allows users in multi-location practices, or when outside of the practice (on iPhone) to communicate with each other. If swapping to Global for the first time, a **Global Channel** will be authorised for your business automatically.

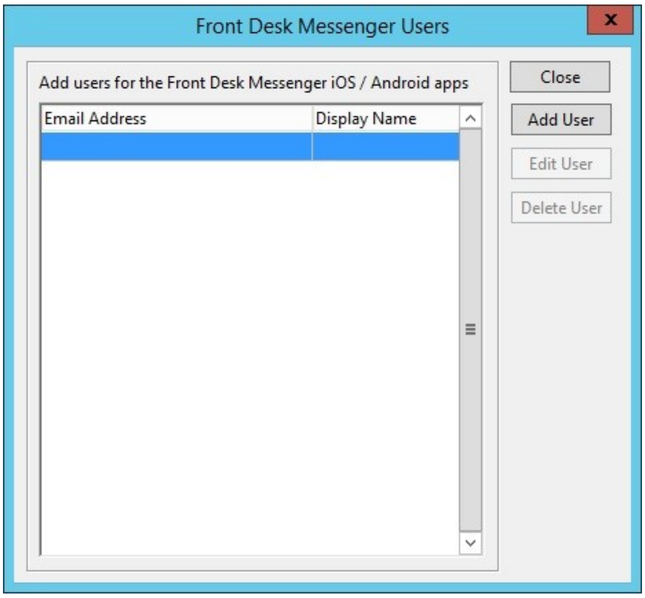
Run Front Desk Office Messenger on Start-up (Multi-user Environment Only) can be turned off for users that don’t want the Messenger to run automatically.

If you are running multiple Front Desk databases on the same network, the **Local Channel** option can be set to allow private communication between different groups of Messenger users. This can be used to keep communication separate per database.

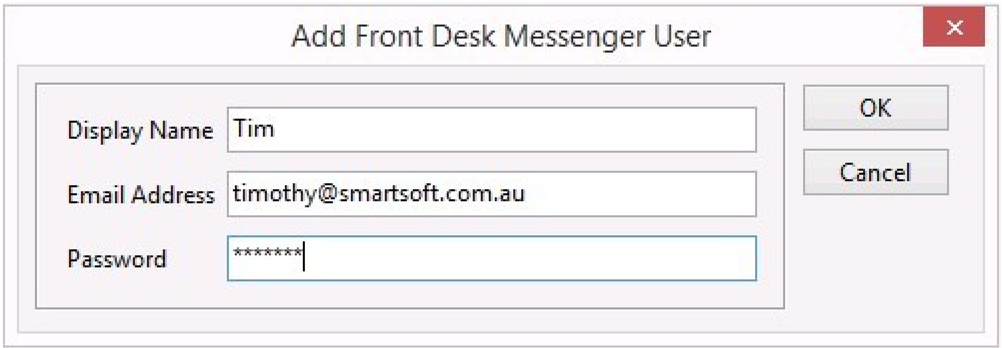
System Information - Messenger (for iOS / Android)

Using the **Global** option allows the **Front Desk Messenger for iOS / Android** to be used and communicate with Front Desk users and other iOS/Android devices.

Select **Authorised iOS / Android Users**.



Click **Add User** to create a new mobile device user.



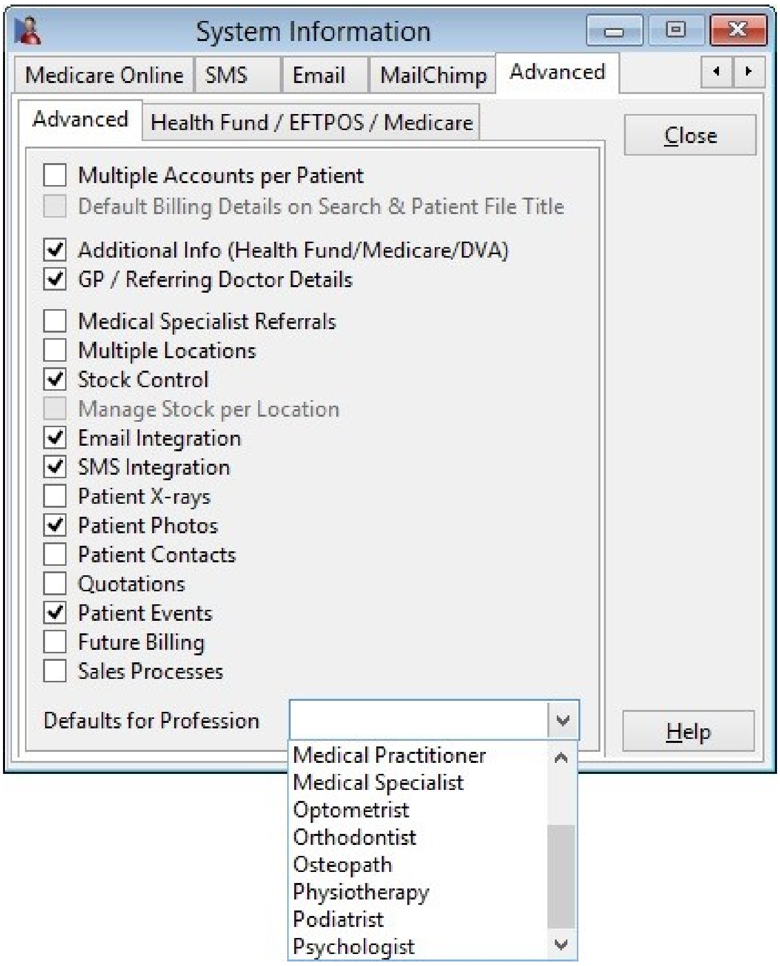
The **Display Name** should match the Front Desk login of the user. This will link the iOS/Android login to the appropriate Front Desk login, and allow you to receive messages on your desktop and mobile device at the same time.

For more information on the setup and use of the Front Desk Messenger for iOS / Android please see the **Add-Ons User Guide**.

System Information - Advanced

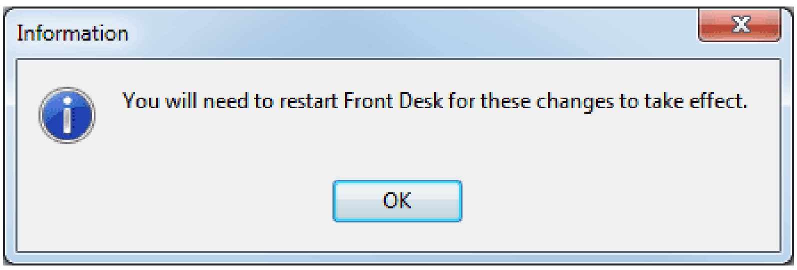
Select the **Advanced** tab from the **System Information** dialog.

To access the **Advanced** tab, you will need to log on as the **Admin** user.



Only select the features that will be necessary in the day-to-day running of your practice. If you are unsure which options to select, use the **Defaults for Profession** option and select your profession from the drop-down list. This will automatically set the features that are generally required for your profession. Please contact Smartsoft before selecting any of the above features, which are not defaults for your profession.

Options that are selected will only take effect once you have restarted *Front Desk 2017*.

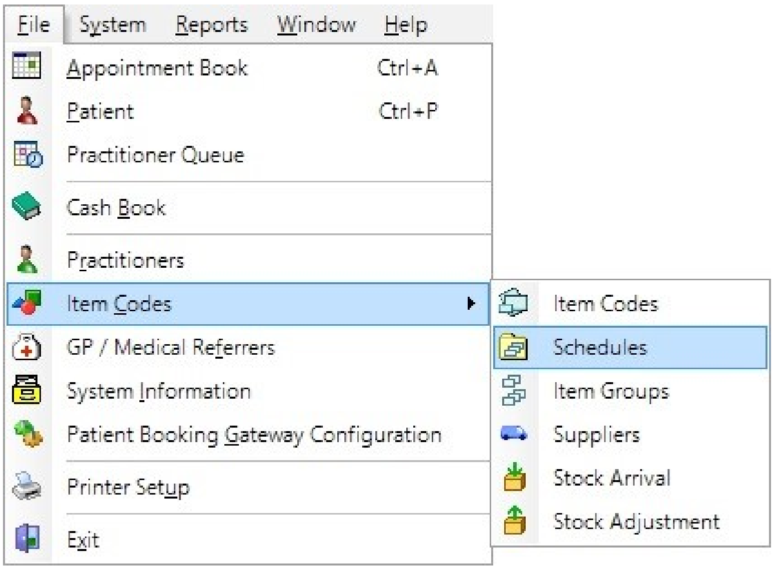


The features in the **Advanced** tab will be covered in more detail later in this manual.

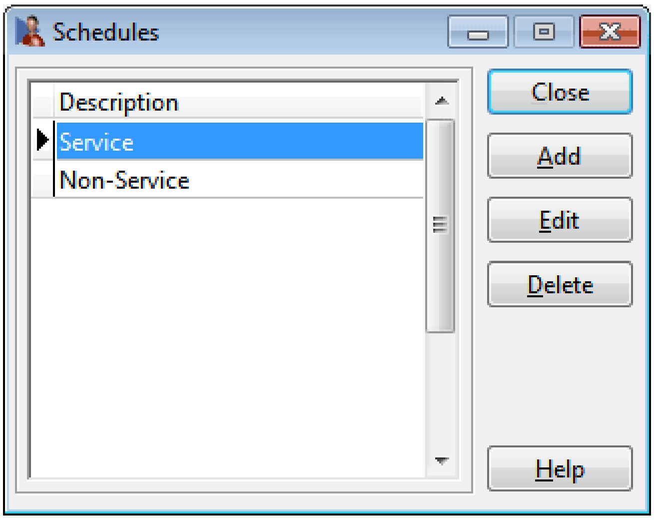
Item Codes

Before creating **Item Codes** you will need to create one or more **Schedules**. A schedule is used to group and categorise Item Codes, such as by service, product type or profession. This can be useful when more than one health professional is using the system.

Select **Item Codes** from the **File** menu and scroll across to **Schedules**.



You will be presented with the following screen.



By default **Service** and **Non-Service** will already be entered. You may wish to edit these or create your own.

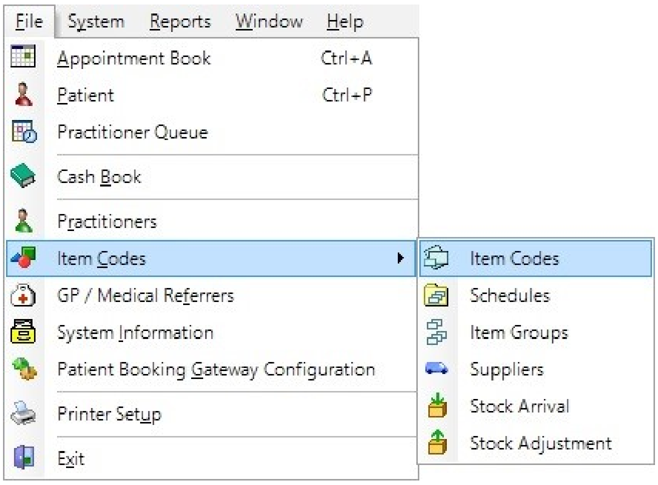
To create a new schedule click the **Add** button, to rename an existing schedule click the **Edit** button, to remove a schedule click the **Delete** button.

Once you have at least one schedule entered, you can begin to enter your item codes into the system.

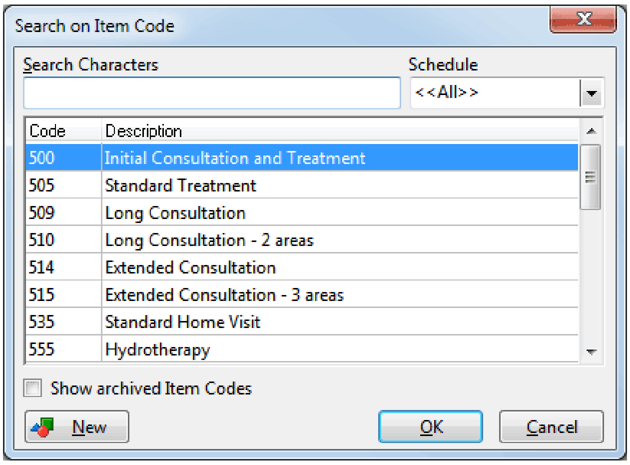
Item Codes

Select **Item Codes** from the **Toolbar.**

or from the **File** menu.



A **Search on Item Codes** dialog will be presented.



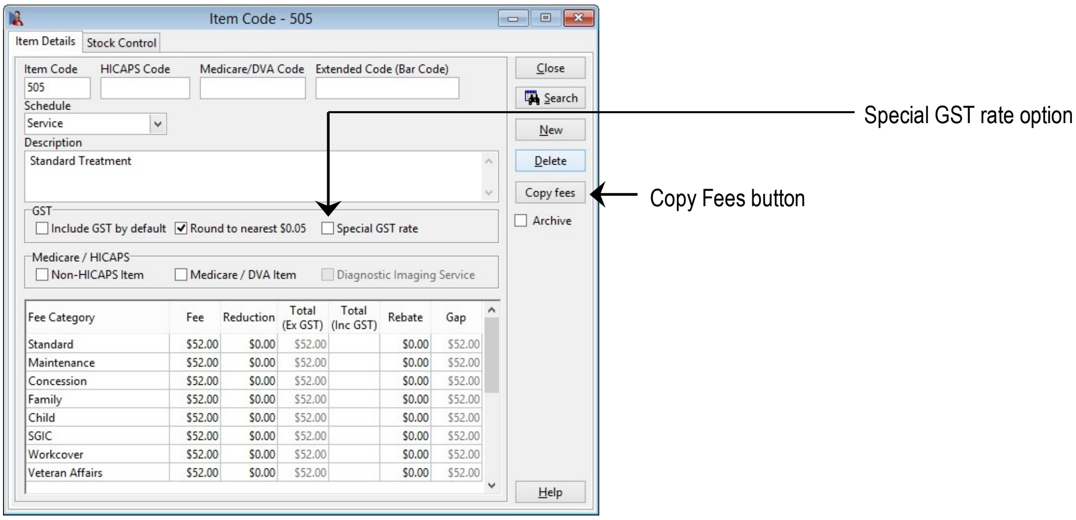
To create a new item code, click the **New** button. To search for an existing item code type the code in the **Search Characters** field.

To narrow your search by **Schedule** click on the drop-down box or alternatively leave it as **<<All>>**. If the item code does not appear select the **Show archived Item Codes** option, as it may have been marked archived.

To view the details of an item code either double click on the code or highlight the code and click the **OK** button.

Item Codes

The **Item Code** dialog will be presented as below.



Enter the **Item Code** and **Description** of the item. Select which schedule this code belongs to from the **Schedule** drop-down box.

If a different code is required for HICAPS/HealthPoint, enter the code in the **HICAPS Code** or **HealthPoint Code** field. This option is only available when either HICAPS or TYRO integration has been enabled.

If a different code is required for Medicare / DVA Online or Medicare Easyclaim, enter the code in the **Medicare/DVA Code** field.

If this item has a Bar Code, scan it and this information will be entered as the **Extended Code (Bar Code).**

Enter the fees for each applicable fee category (which were set up in **System Information**).

For example, a standard consultation is $32.00 for a standard patient but for a concession patient it is $28.00.

If the item code attracts GST select the **Include GST by default** option. If the GST rate for a particular item is not the default 10% rate, select the **Special GST rate** option and enter the correct rate for that item.

To bill a patient the full fee and have the reduction printed on receipts, accounts and statements enter the full fee in the **Fees** column followed by the reduction amount in the **Reduction** column. Alternatively you may wish to enter the reduction amount at the time of billing.

If there is a **fixed** rebate amount associated with the item code, enter this amount in the **Rebate** column. The **Gap** amount will be automatically calculated.

Front Desk 2017 - Tip

Use the **<TAB>** key when advancing to the next field. There is no need to enter the dollar sign ($) when keying in currency amounts.

Item Codes

To view a different item code, click the **Search** button.

To create a new item code, click the **New** button. You will be prompted to save the previously entered data.

To exit the current item code, click the **Close** button.

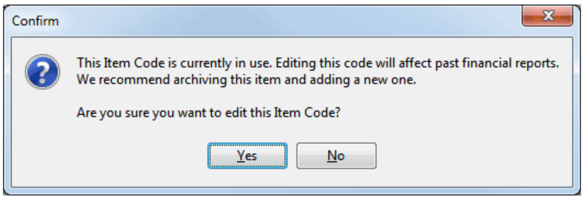
To remove an item code, click the **Delete** button.

To copy the first fee to the entire list of fee categories click the **Copy Fees** button. This saves time when entering in fees and reductions which are the same price for all or most of the Fee Categories.

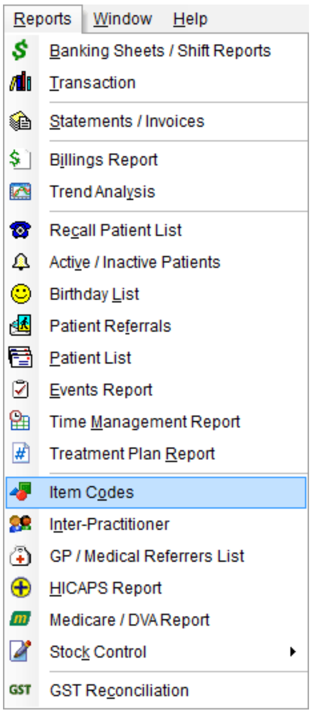
If the item code is no longer in use, tick the **Archive** box.

Front Desk 2017 - Note

It is best to make an item code **Archived** rather than deleting it if the item code has been used in the past. If an Item Code has been previously used you will see the following warning displayed. Click **Yes** to continue or **No** to cancel edit.

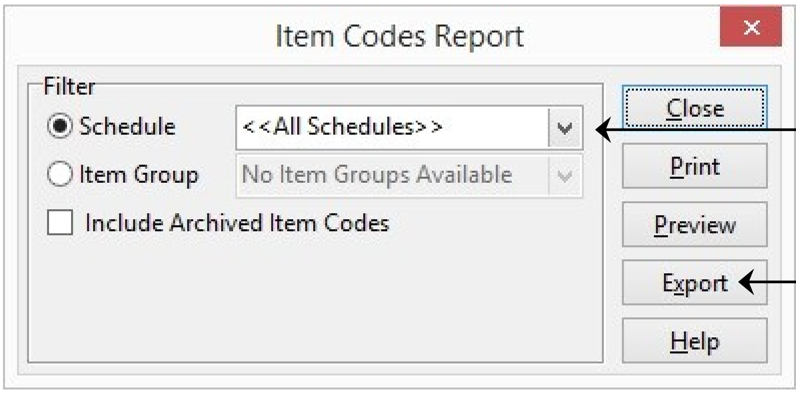


When all the item codes applicable to your practice have been entered, you may wish to print a report showing all item codes and associated fees. To generate this report, select **Item Codes** from the **Reports** menu.



Item Codes

The **Item Codes Report** dialog will be presented as below:



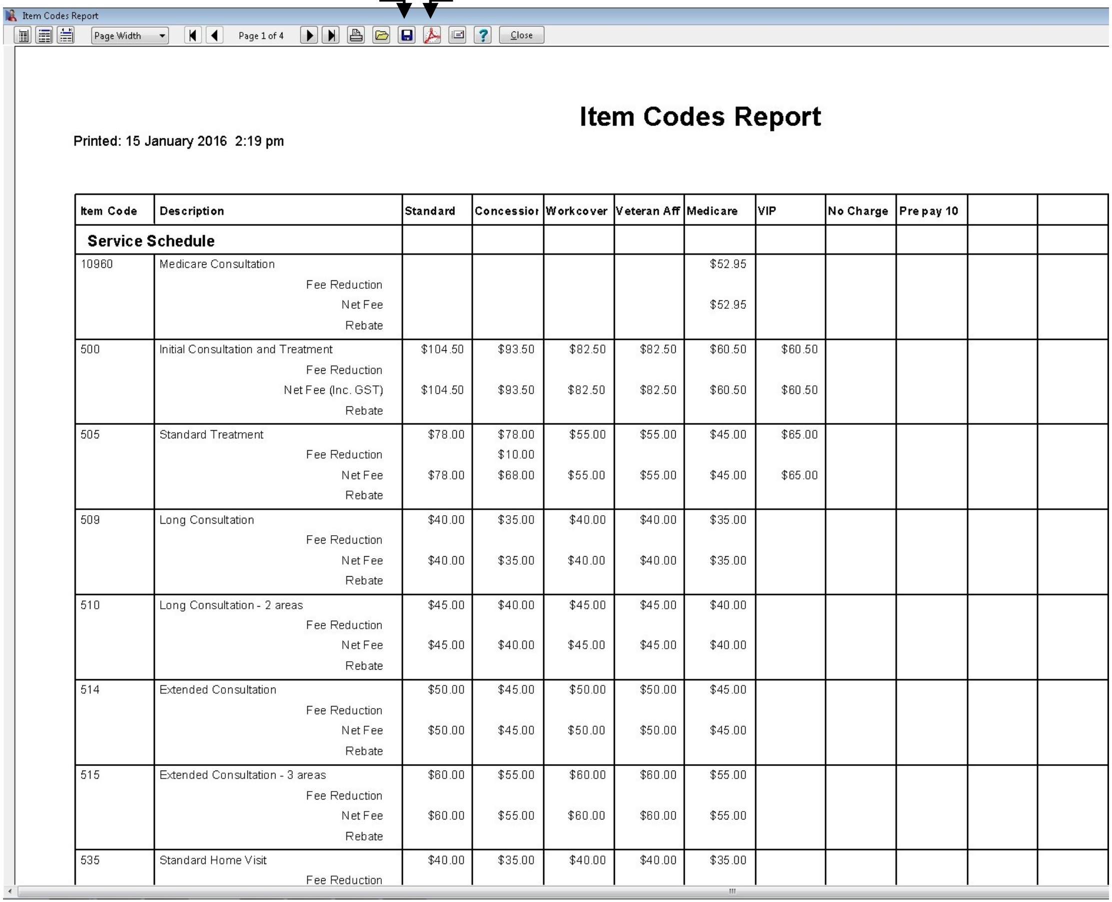
Schedule drop-down box

Export to Excel or CSV file

Select the schedule you wish to view from the **Schedule** drop-down box or alternatively leave it set to **<<All Schedules>>**. If you wish to include archived codes, check the **Include Archived Item Codes** box.

This report can be **Printed**, **Previewed** or **Exported** by clicking these buttons. To create a PDF of this report, preview the report and click the *Acrobat* icon.

Save icon Acrobat icon



Item Codes Report

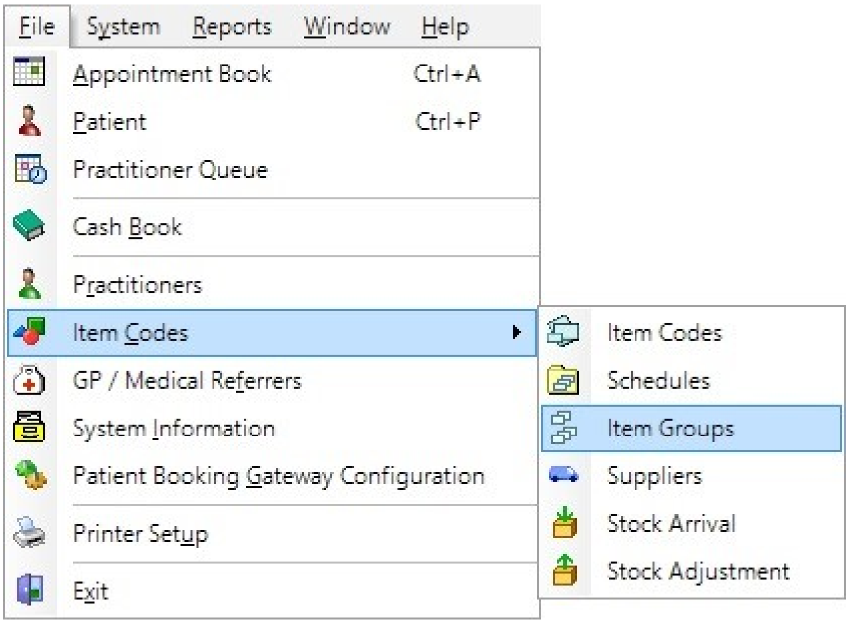
Printed: 15 January 2016 2:19 pm

Item Code	Description	Standard	Concession	Workcover	Veteran Aff	Medicare	VIP	No Charge	Pre pay 10		
Service Schedule											
10960	Medicare Consultation					$52.95					
	Fee Reduction										
	Net Fee					$52.95					
	Rebate										
500	Initial Consultation and Treatment	$104.50	$93.50	$82.50	$82.50	$60.50	$60.50				
	Fee Reduction										
	Net Fee (Inc. GST)	$104.50	$93.50	$82.50	$82.50	$60.50	$60.50				
	Rebate										
505	Standard Treatment	$78.00	$78.00	$55.00	$55.00	$45.00	$65.00				
	Fee Reduction		$10.00								
	Net Fee	$78.00	$68.00	$55.00	$55.00	$45.00	$65.00				
	Rebate										
509	Long Consultation	$40.00	$35.00	$40.00	$40.00	$35.00					
	Fee Reduction										
	Net Fee	$40.00	$35.00	$40.00	$40.00	$35.00					
	Rebate										
510	Long Consultation - 2 areas	$45.00	$40.00	$45.00	$45.00	$40.00					
	Fee Reduction										
	Net Fee	$45.00	$40.00	$45.00	$45.00	$40.00					
	Rebate										
514	Extended Consultation	$50.00	$45.00	$50.00	$50.00	$45.00					
	Fee Reduction										
	Net Fee	$50.00	$45.00	$50.00	$50.00	$45.00					
	Rebate										
515	Extended Consultation - 3 areas	$60.00	$55.00	$60.00	$60.00	$55.00					
	Fee Reduction										
	Net Fee	$60.00	$55.00	$60.00	$60.00	$55.00					
	Rebate										
535	Standard Home Visit	$40.00	$35.00	$40.00	$40.00	$35.00					
	Fee Reduction										

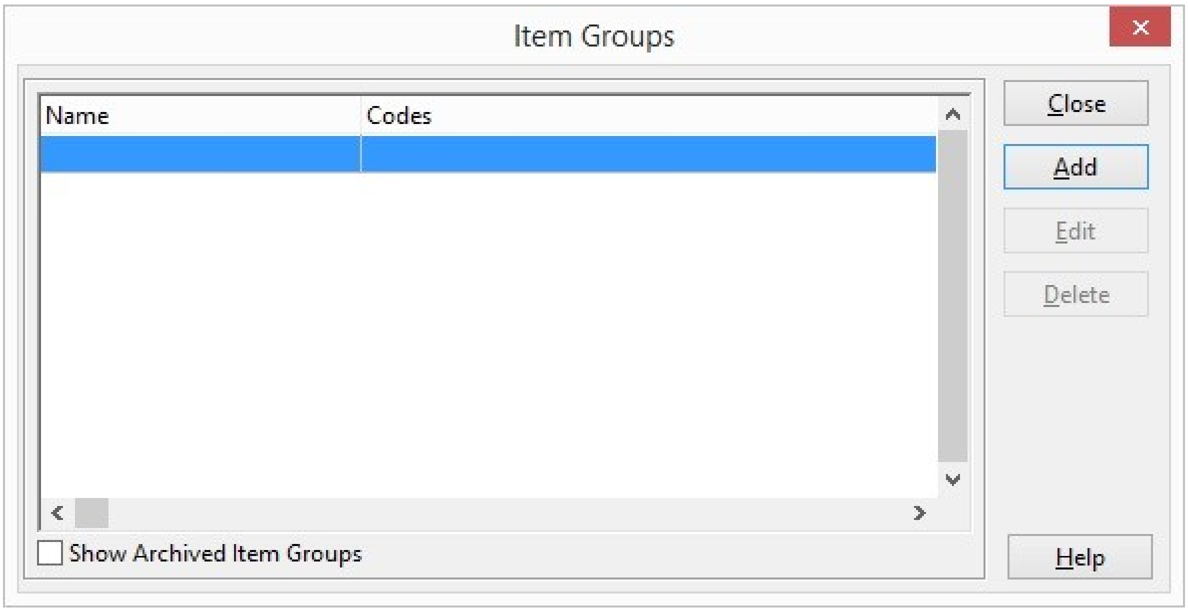
Item Codes

To report on different combinations of Item Codes, **Item Groups** can be created.

Select **Item Groups** from the **File** menu.



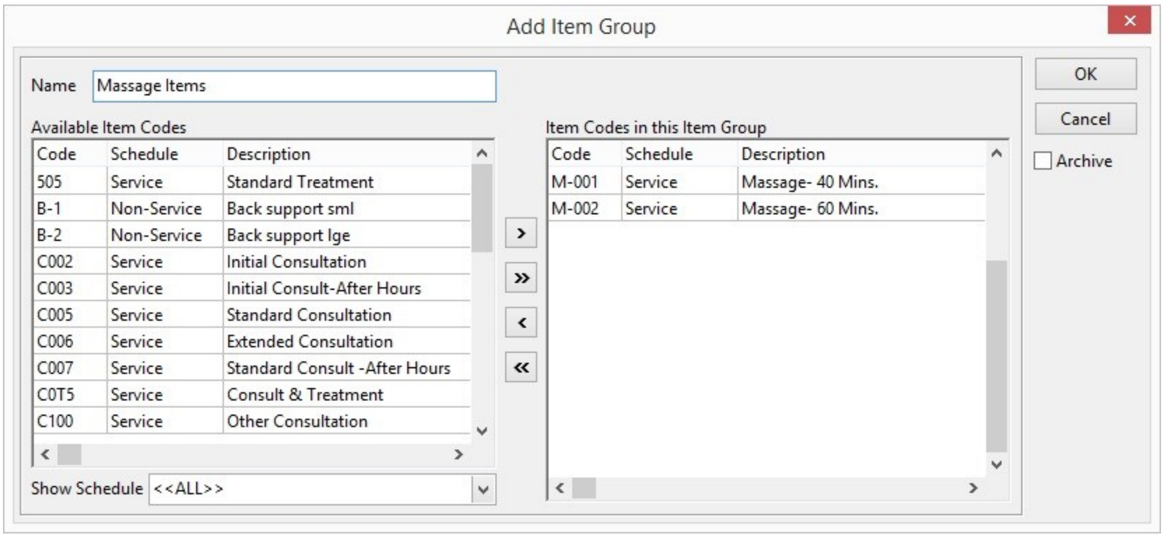
Click **Add** to create a new Item Group.



Enter a **Name** for the group, then move items from the **Available Item Codes** to the **Item Codes in this Item Group** using the arrows in the middle of the window. Multiple items can be selected at a time by holding the **<CTRL>** key when clicking.

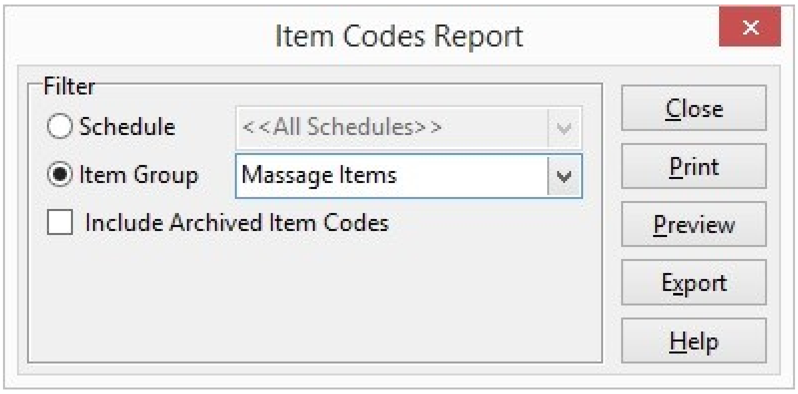
Item Codes

Items moved to the right side of the window belong to the group.

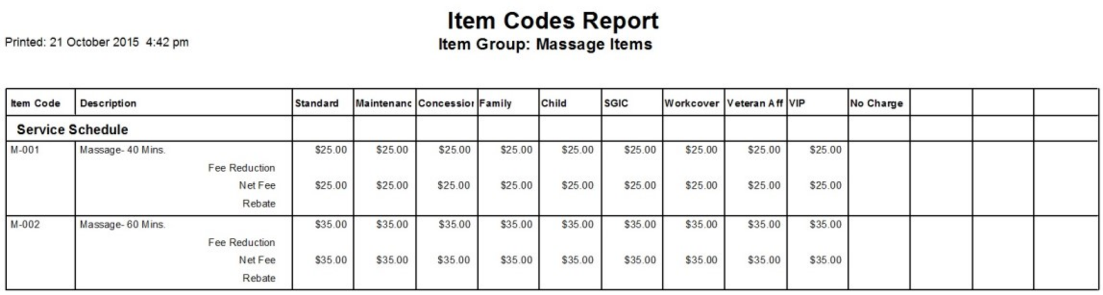


Click **OK** to save the Item Group.

On applicable reports you will now have the option to select **Item Groups**.



The generated report will then be filtered to only include the Item Codes within the group.



Item Codes Report

Printed: 21 October 2015 4:42 pm

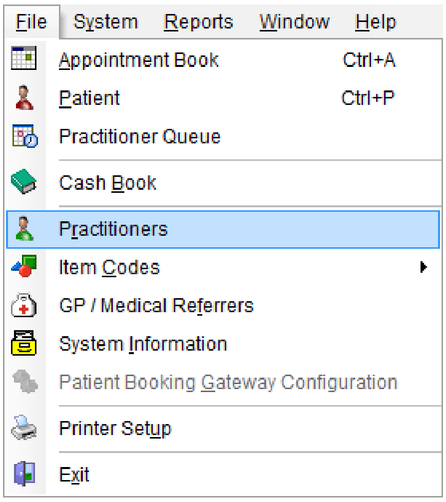
Item Group: Massage Items

Item Code	Description	Standard	Maintenanc	Concessior	Family	Child	SGIC	Workcover	Veteran Aff	VIP	No Charge			
Service Schedule														
M-001	Massage- 40 Mins.	$25.00	$25.00	$25.00	$25.00	$25.00	$25.00	$25.00	$25.00	$25.00				
	Fee Reduction													
	Net Fee	$25.00	$25.00	$25.00	$25.00	$25.00	$25.00	$25.00	$25.00	$25.00				
	Rebate													
M-002	Massage- 60 Mins.	$35.00	$35.00	$35.00	$35.00	$35.00	$35.00	$35.00	$35.00	$35.00				
	Fee Reduction													
	Net Fee	$35.00	$35.00	$35.00	$35.00	$35.00	$35.00	$35.00	$35.00	$35.00				
	Rebate													

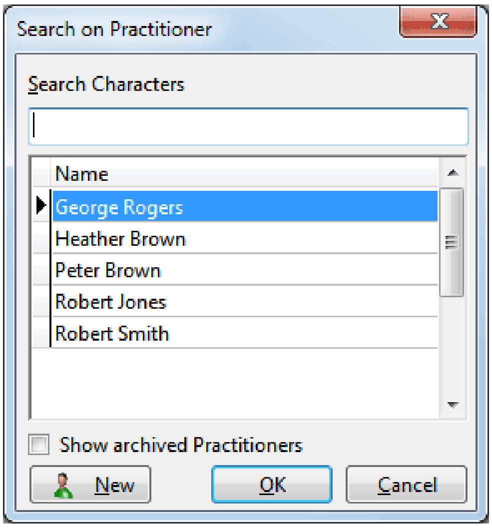
Practitioners

Select **Practitioners** from the **Toolbar.**

or from the **File** menu.



A **Search on Practitioner** dialog will be presented.



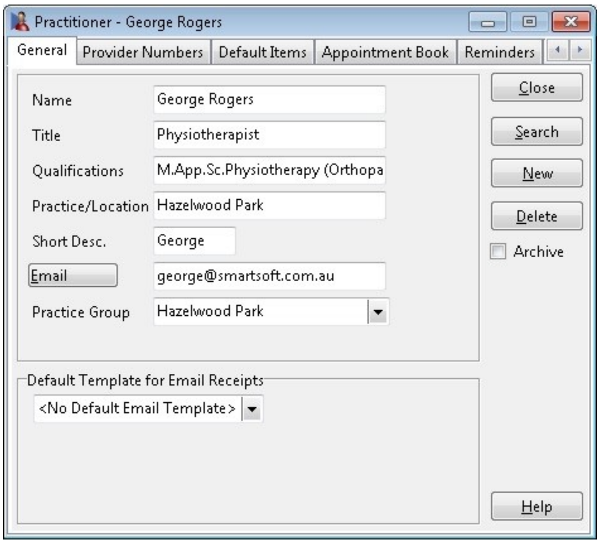
To create a practitioner, click the **New** button.

To **Edit** an existing practitioner, highlight their name and click **OK** to open the practitioner file. The practitioner list can also be searched by typing into the '**Search Characters'** field.

Select the **Show Archived Practitioners** option to view archived practitioners, who are otherwise hidden from the list.

Practitioners – General

After clicking the **New** button the new **Practitioner** screen will appear.



Enter the **Name, Title** and **Qualifications** for the practitioner, these details will appear on receipts, accounts, invoices and statements. Each practitioner must have a **Short Description**, up to 7 characters long, this is used for internal reports only. For example, Dr George Rogers could have 'George', ‘Rogers’ or 'GR' as their short description.

Entering an **Email** address allows for emails to be sent directly from the practitioner file. This address is also used to send cancellation emails to the practitioner.

The **Practice/Location** should only be entered if the practitioner services more than one location.

Select the practice group for this practitioner from the **Practice Group** drop-down box.

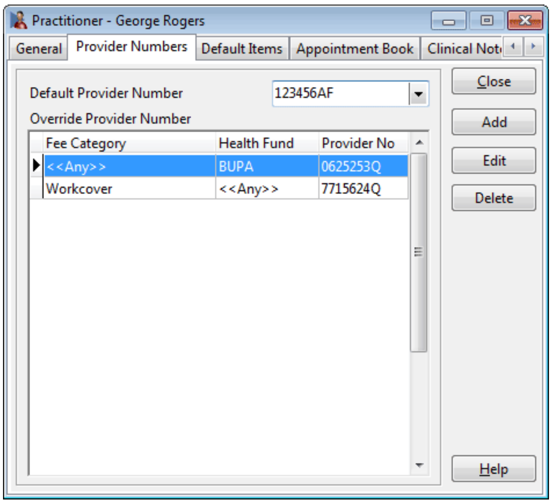
A **Default Template for Email Receipts** can also be set for individual practitioners, which will override the practice defaults.

To view a different practitioner file click the **Search** button, to create another practitioner file click the **New** button, to remove a practitioner file click the **Delete** button.

If the practitioner is no longer with the practice you can archive them by checking the **Archive** box.

Practitioners - Provider Numbers

Select the **Provider Numbers** tab from the **Practitioner** file.

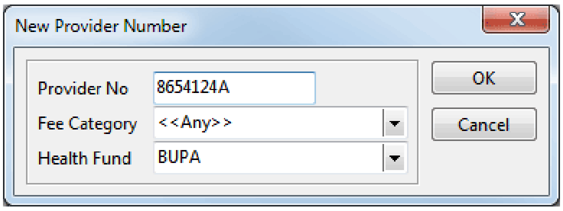


Enter the **Default Provider Number** for the practitioner. This will be the provider number that will be most commonly used.

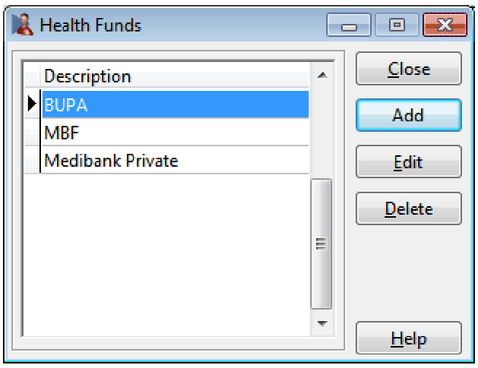
Multiple provider numbers can be specified for each practitioner. If the practitioner has different provider numbers for a specific Health Fund or Fee Category add these in the **Override Provider Number** section.

To create a new provider number click the **Add** button, to change a provider number click the **Edit** button and to remove a provider number click the **Delete** button.

Enter in the provider number and select from the drop-down box the **Fee Category and/or Health Fund** for this provider number.

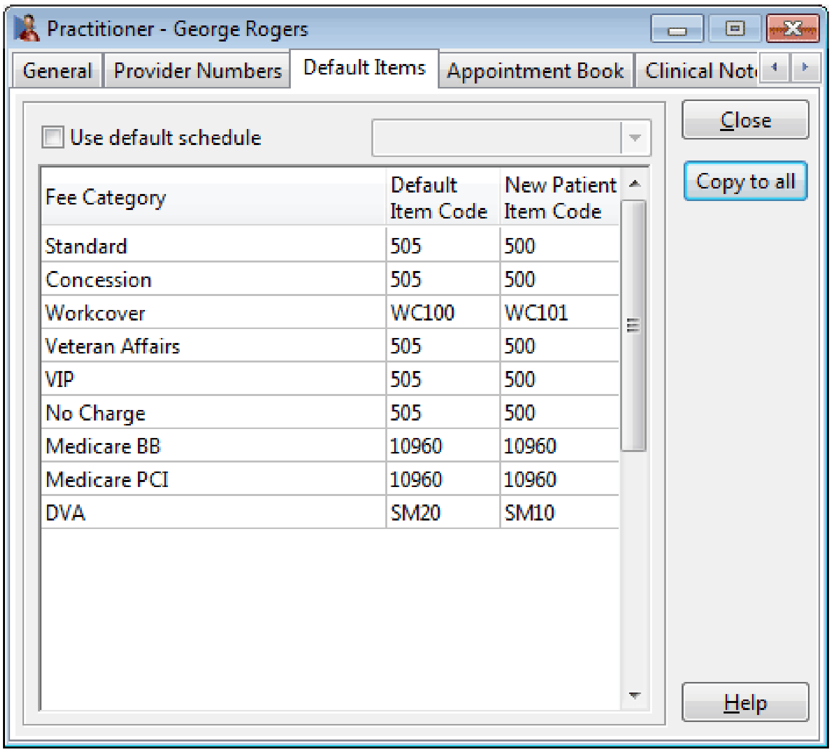


To set up health funds in *Front Desk 2017,* select **Health Funds** from the **System** menu. To create a health fund click **Add**, to change a health fund click **Edit** and to remove a health fund click **Delete**.



Practitioners - Default Items

Select the **Default Items** tab from the **Practitioner** file.



A default schedule can be specified for each practitioner by selecting the **Use default schedule** option. From the drop-down box select the schedule that will be most commonly used.

In the **Default Item Code** column select the most common item code for each fee category from the drop-down boxes.

In the **New Patient Item Code** column select the most common item code for a *new patient* from the drop-down boxes.

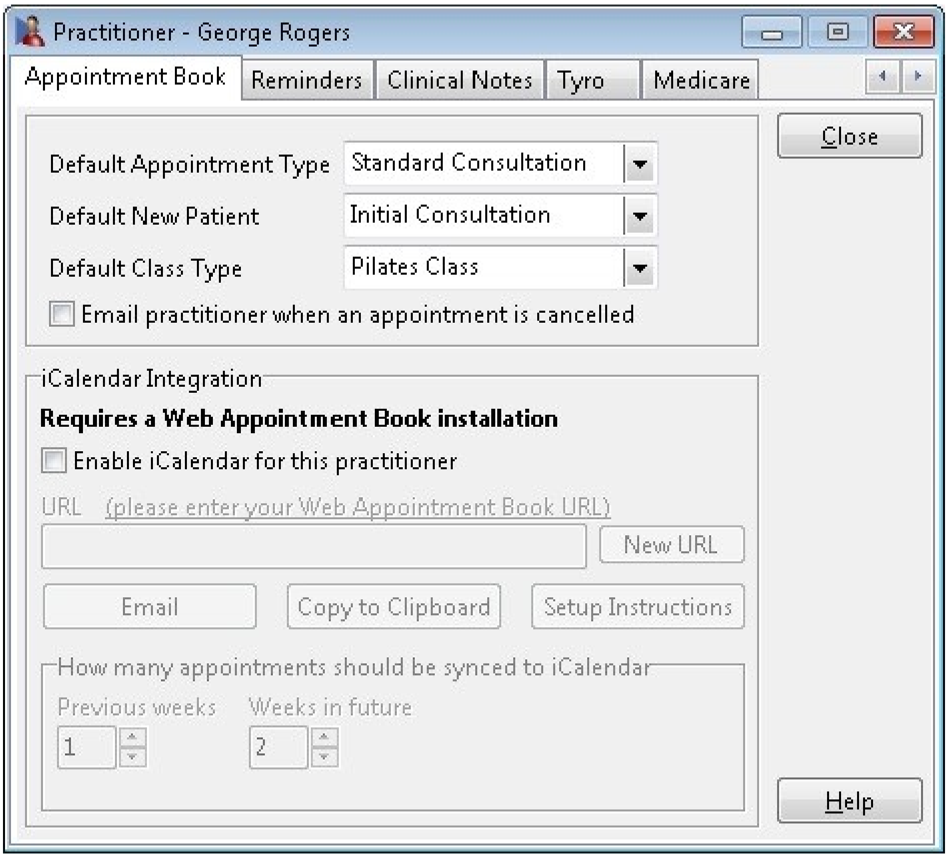
Generally, the most commonly used *Consultation* item code will be set as the **Default Item Code** and the most commonly used *Initial Consultation* item code as the **New Patient Item Code**. Note that certain patient types such as Veteran Affairs and WorkCover may have different item codes.

The default item codes will be used by default when making appointments and billing.

To set each fee category to the same item code as the first, click **Copy to all**.

Practitioners - Appointment Book

Select the **Appointment Book** tab from the **Practitioner** file.



Default Appointment Types can be set individually per practitioner where required.

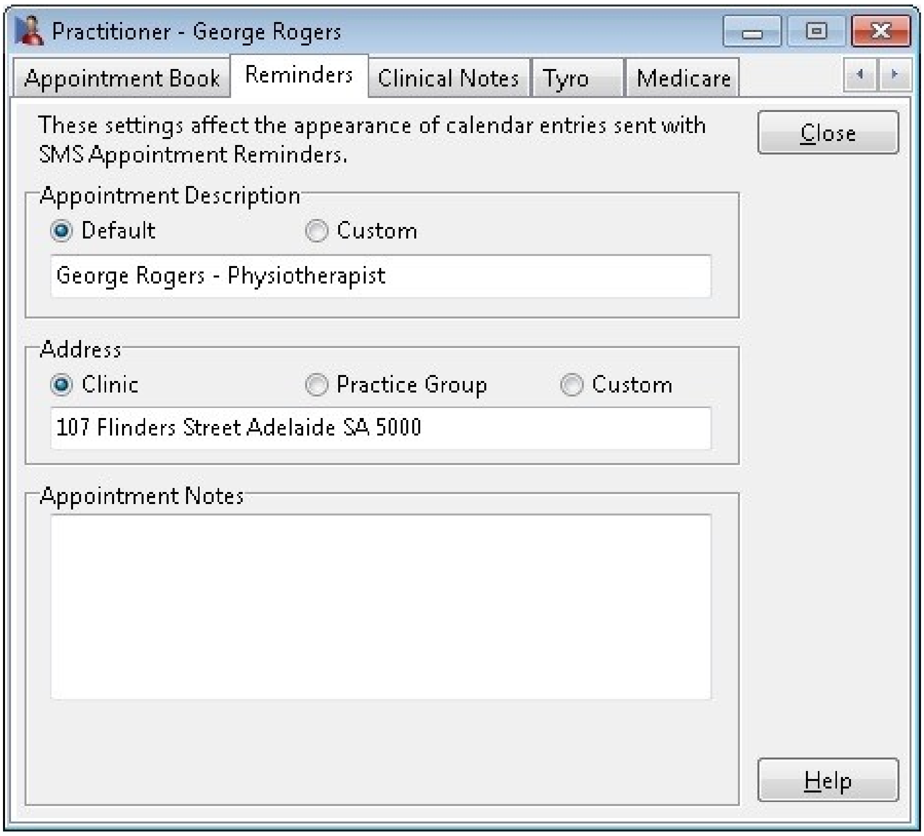
Select a **Default Appointment Type** to specify a default for continuing patients.
Select a **Default New Patient** to specify a default for new patients.
Select a **Default Class Type** to specify a default for group bookings.

The defaults selected will take precedence over any clinic based defaults set within **System Information** when making appointments with this practitioner.

Email practitioner when an appointment is cancelled can be selected to send an email to the practitioner when an appointment is cancelled.

Practitioners - Reminders

Select the **Reminders** tab from the **Practitioner** file.



These settings are used to determine the appearance of calendar entries that are sent with SMS Appointment Reminders, when using calendar links.

The **Appointment Description** will be used as the description in the calendar entry.

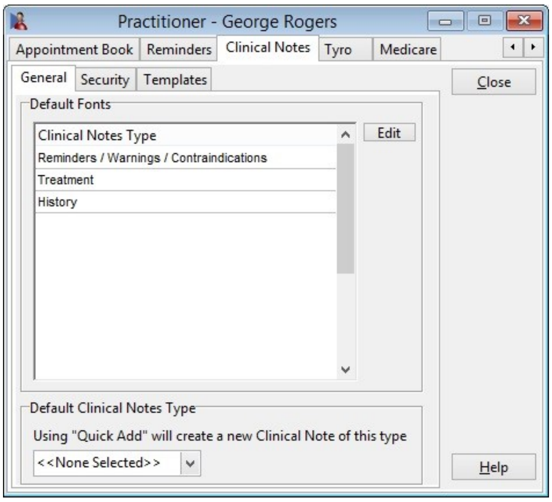
The **Address** will be listed inside the appointment as the location for the appointment. On some devices such as an iPhone, a map of the location will also be displayed.

Appointment Notes can also be added, which can provide patients additional information such as 'parking can be found at the rear' etc.

In order to include calendar links with SMS reminders, **iCalendar integration** must be enabled and the **Add a calendar link to SMS reminders** option must be selected at the time of sending.

Practitioners - Clinical Notes

Select the **Clinical Notes** tab from the **Practitioner** window and then select the **General** tab.

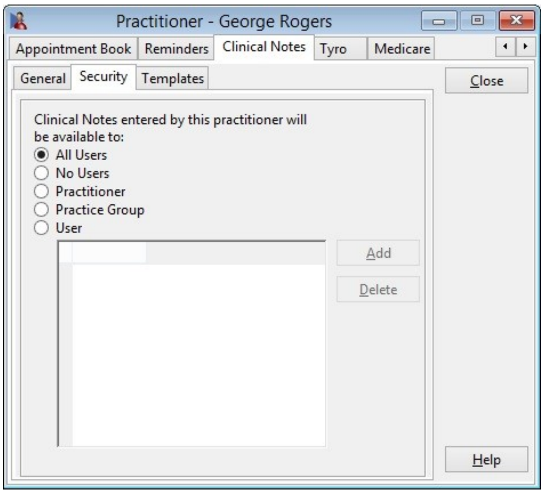


Practitioners may wish to have their clinical note entries appear in a specific font, style and size. To change the font of **Reminders / Warnings / Contraindications**, or a specific Clinical Notes Type click **Edit**. A practitioner must be logged into the system under their user name for these formatting settings to be used.

Editing these defaults will not change any existing entries and will only change the format of subsequent clinical notes records.

By selecting a **Default Clinical Notes Type** the practitioner can use the **Quick Add** option within Clinical Notes to create a new note without having to manually select the type.

Access to a practitioner's clinical notes can be set from the **Security** tab.

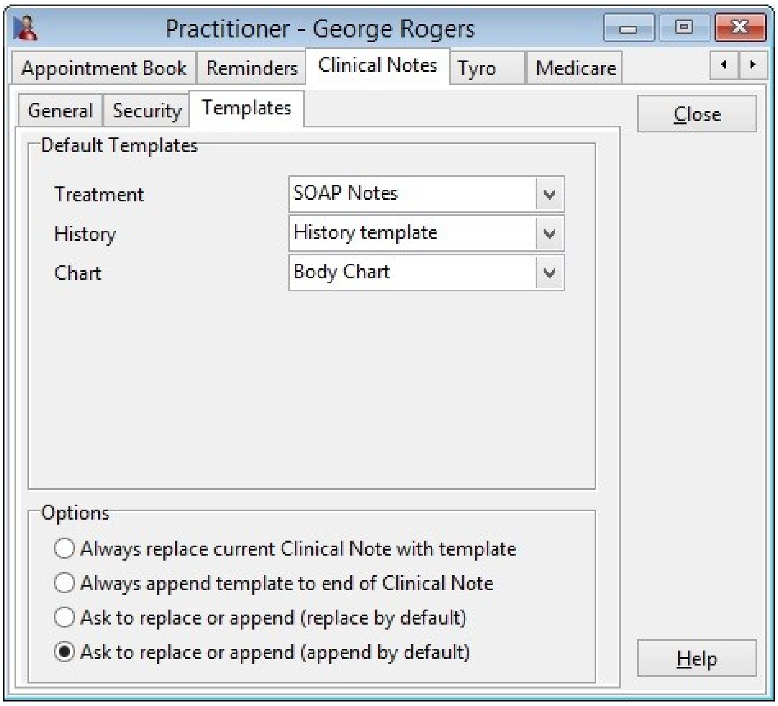


To **Add** or **Delete** a practitioner, practice group or user, click the corresponding button.

Practitioners - Clinical Notes

Access to clinical notes can be restricted to all users, no users, particular practitioners, practice groups or specific users to allow or deny access to their clinical notes.

Default templates for each *clinical note type* can be set on the **Templates** tab. When a new clinical note is entered into a patient's file, the default template will be automatically inserted.



It is not necessary to set a default template if you wish the new clinical note entry to be blank.

The **Options** section allows users to set the default action when adding a template to an existing clinical note.

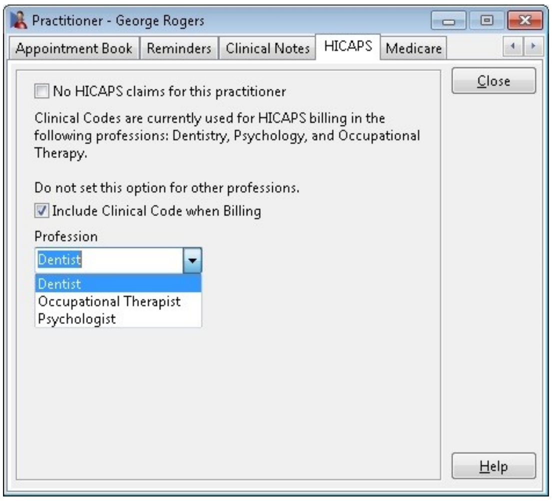
Always replace current Clinical Note with template will replace the existing clinical note entry with the selected template.

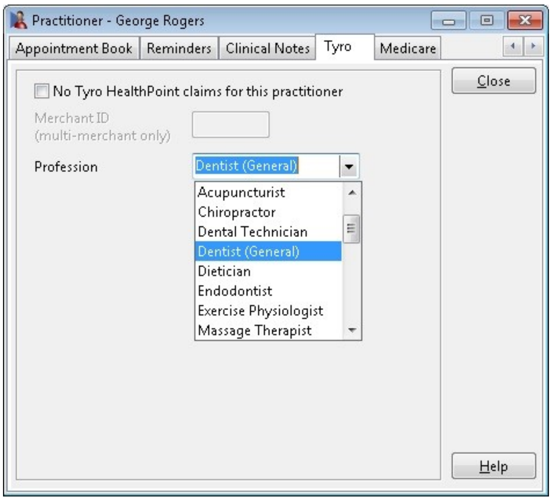
Always append template to end of Clinical Note will add the selected template to the bottom of the existing clinical note.

Ask to replace or append (replace by default) will ask if the user wants to replace or append the existing clinical note with the selected template, with the replace option selected by default.

Ask to replace or append (append by default) will ask if the user wants to replace or append the existing clinical note with the selected template, with the append option selected by default.

Practitioners – HICAPS/Tyro





Select **No HICAPS/Tyro HealthPoint claims for this practitioner** to disable HICAPS/Tyro claiming for this practitioner.

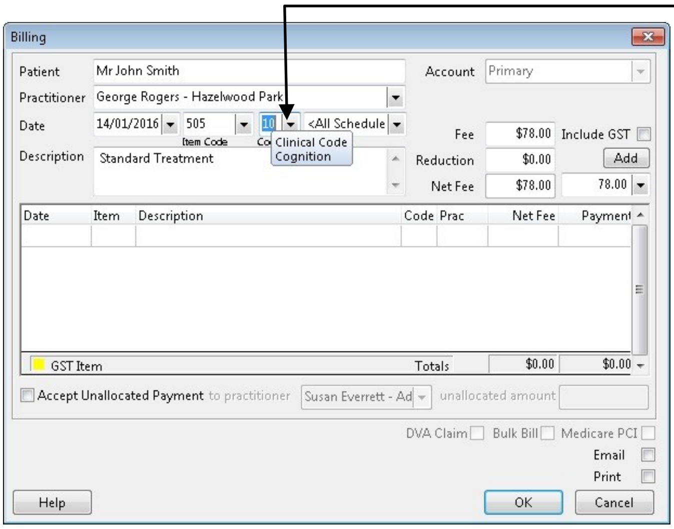
Clinical Codes are used as part of the billing process required by health funds when processing transactions through the **HICAPS** or **Tyro** interfaces for Dentists, Occupational Therapists and Psychologists. For Dentists the Clinical Code equates to the Tooth Number. **Please note that this requirement does not currently apply to other health professionals.**

To include a **Clinical Code** when billing for a practitioner, select the **HICAPS** or **Tyro** tab. If using HICAPS, check the **Include Clinical Code when Billing** option then select the practitioner's profession from the **Profession** drop-down list. A profession must be selected when using Tyro, whether Clinical Codes will be used or not.

After configuring this option for a practitioner a new **Clinical Code** field is displayed adjacent to the **Item Code** on the receipt and billing screen.

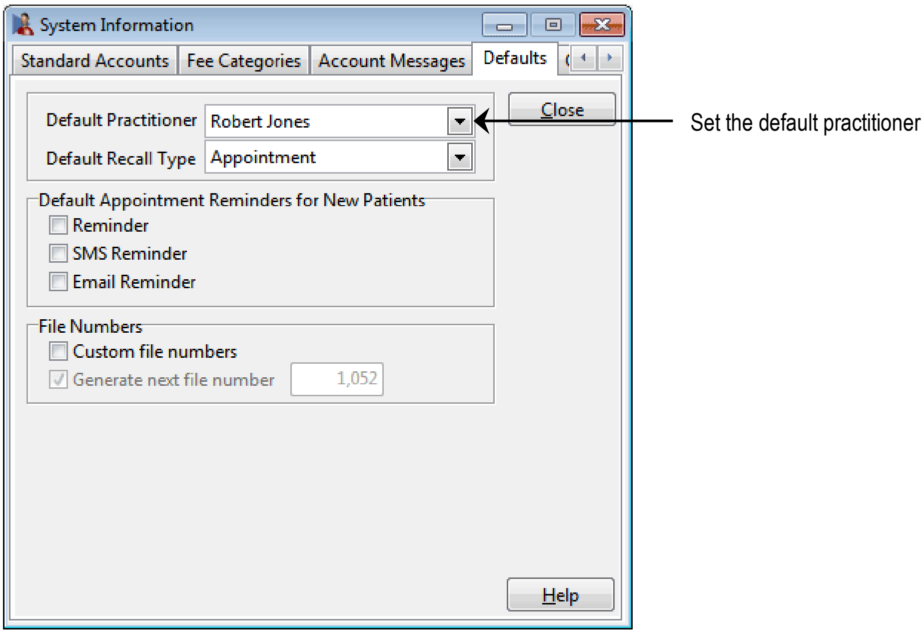
When billing a patient, select the **Clinical Code** for the HICAPS or HealthPoint claim. If you place the cursor over the **Clinical Code** field a description will appear in the on screen tool tip.

Clinical Code

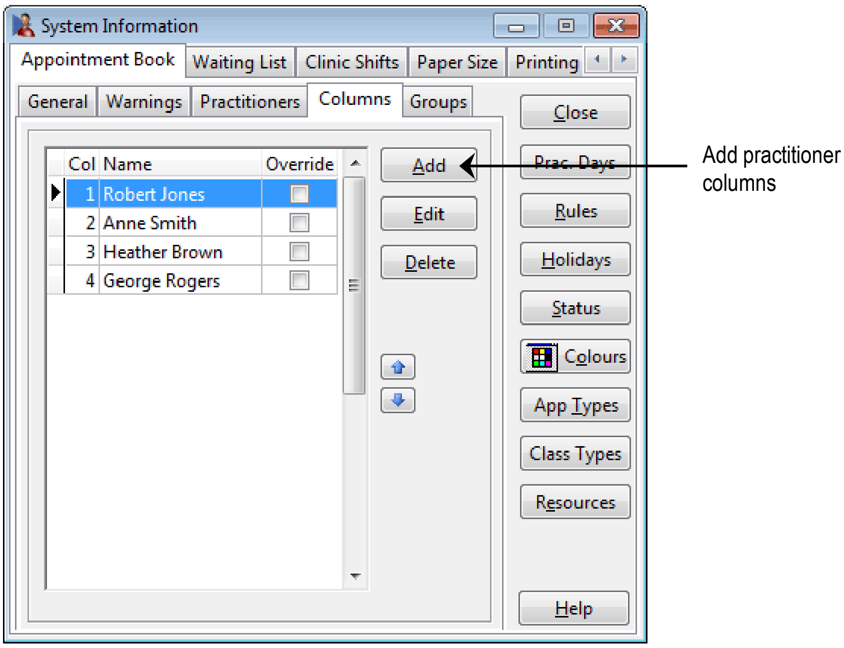


Setting Up Front Desk 2017

If you are setting up *Front Desk 2017* for the first time return to **System Information** and select the **Defaults** tab. Set the **Default Practitioner** to one of the now available practitioners.



You are now able to set up columns for your practitioner on the Appointment Book. Select the **Appointment Book** tab and go to the **Columns** tab.

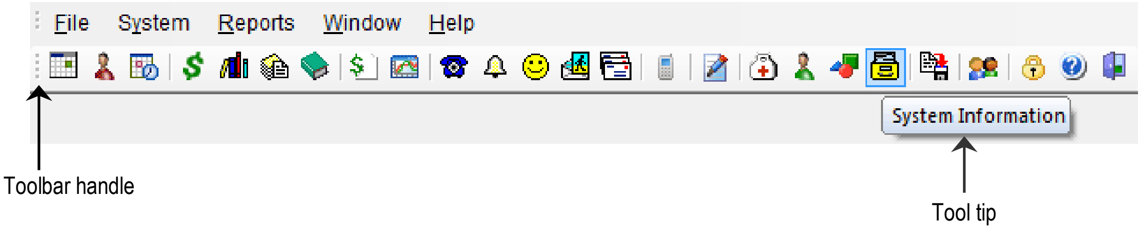


Practitioners use one or more columns on the Appointment Book. To add a column for a practitioner, click the **Add** button and from the drop-down box select the practitioner's name. To remove a column, highlight the column and click the **Delete** button. Use the up and down arrows to change the order of the columns.

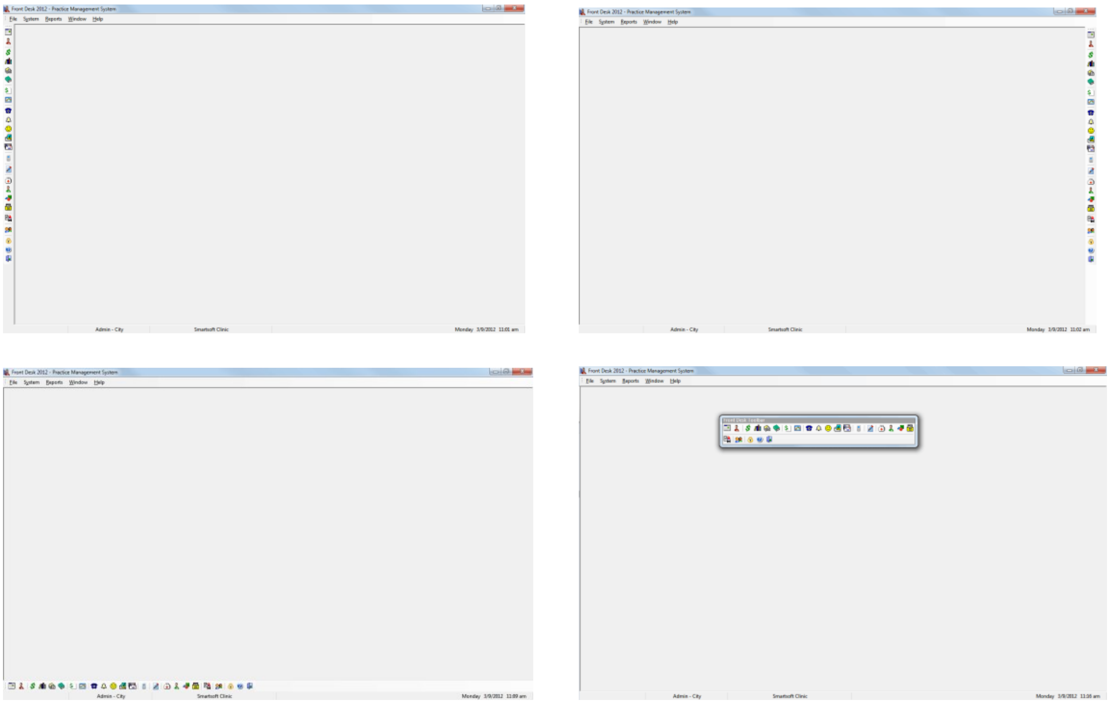
Congratulations! You have now set up System Information, Item Codes and Practitioners in the *Front Desk 2017 - Practice Management System*.

WORKING WITH THE FRONT DESK 2017 TOOLBAR

To view the function of a button on the **Toolbar**, point to the icon with your mouse and a tool tip will be displayed. Depending on your access rights, the **Toolbar** may not have all the buttons displayed.

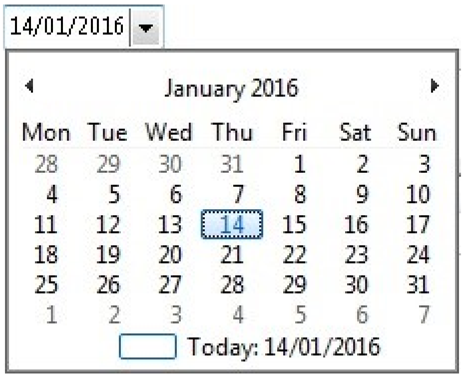


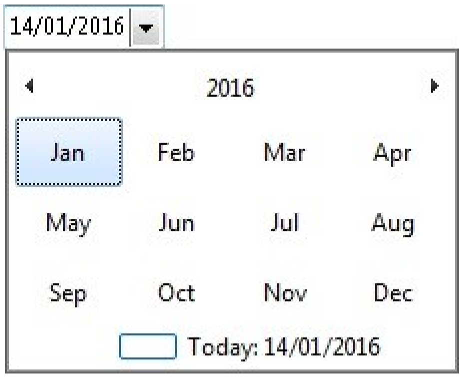
By default this **Toolbar** will be positioned on the top left hand corner of the screen. To move the **Toolbar** to the left, bottom or right of the screen hold down the left mouse button over the **Toolbar** handle and drag the **Toolbar** into position required. The **Toolbar** may even be left floating.

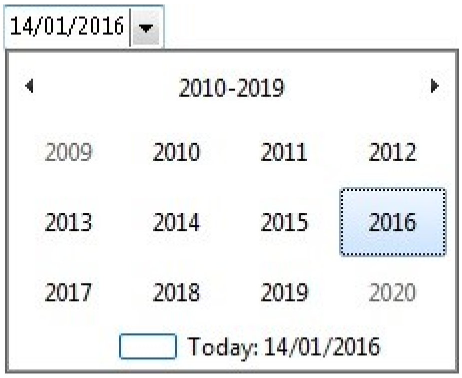


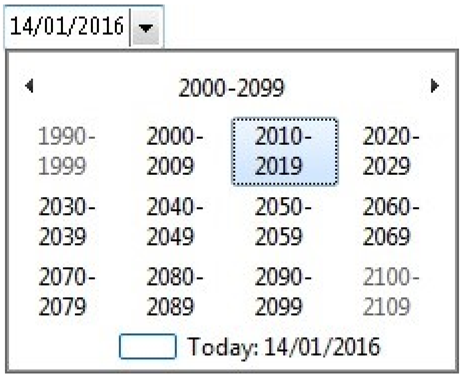
WORKING WITH DATES

Many features within *Front Desk 2017* require a date entry. To make the selection of a valid date easier, *Front Desk 2017* features the following date dialogs.









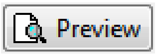
Setting the desired date involves the individual selection of day, month and year.

You can select the date by using the calendar. Selecting the desired day will close the calendar dialog. To select a month, you can either use the left and right arrows on the title bar, or from the drop-down box that appears when you left click on the current month in the title bar. To set the desired year, left click on the current year in the title bar and make your selection from the drop-down box.

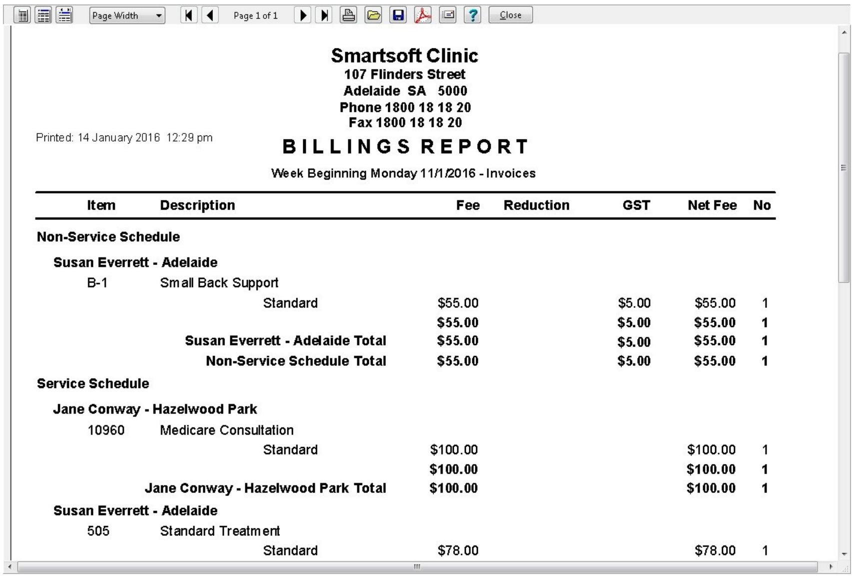
An alternative method involves individually selecting the day, month and year number itself with the left mouse button, and then using the arrow keys on your keyboard. The up ↑ arrow increments and the down ↓ arrow decrements. This method is also used to select a time, i.e. individually select the hour, minute and time of day.

WORKING WITH PREVIEW

To view a report before printing, click the **Preview** button.



A preview screen will be presented.

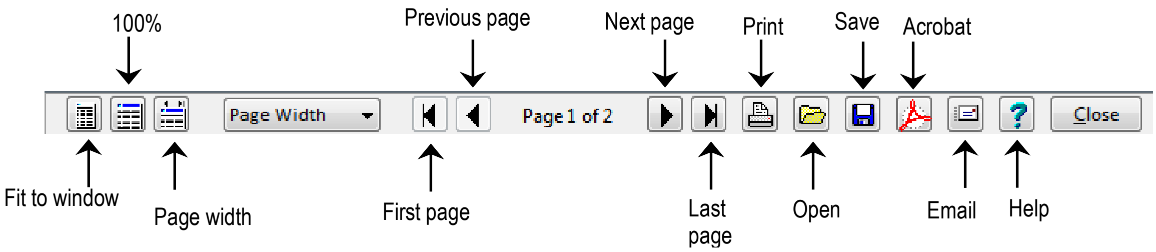

Smartsoft Clinic
107 Flinders Street
Adelaide SA 5000
Phone 1800 18 18 20
Fax 1800 18 18 20

Printed: 14 January 2016 12:29 pm

BILLINGS REPORT

Week Beginning Monday 11/1/2016 - Invoices

Item	Description	Fee	Reduction	GST	Net Fee	No
Non-Service Schedule						
Susan Everrett - Adelaide						
B-1	Small Back Support					
	Standard	$55.00		$5.00	$55.00	1
		$55.00		$5.00	$55.00	1
	Susan Everrett - Adelaide Total	$55.00		$5.00	$55.00	1
	Non-Service Schedule Total	$55.00		$5.00	$55.00	1
Service Schedule						
Jane Conway - Hazelwood Park						
10960	Medicare Consultation					
	Standard	$100.00			$100.00	1
		$100.00			$100.00	1
	Jane Conway - Hazelwood Park Total	$100.00			$100.00	1
Susan Everrett - Adelaide						
505	Standard Treatment					
	Standard	$78.00			$78.00	1



To fully maximise the preview screen use the **100% button** or alternatively use the **Page Width** drop-down box and select the size of the preview required.

Use the arrows to the left and right to view next and previous pages. To print the report, click the **Print** button.

To save the report to disk click the **Save** button. From the **Save As** screen select where you want to save the report, then type a **file name** and click **save**.

To open a previous saved report click the **Open** button.

To save the report as a *PDF file*, click the **Acrobat** button. From the **Save As** screen select where you want to save the file, type a **file name** and click **save**.

To email the report as an attachment, click the **Email** button. Type an **attachment name** and click **OK**. Fill in the details in the **Send Email** screen and click **Send**.

Front Desk 2017 - Note

A **Front Desk 2017 Report Viewer Utility** is available on the *Front Desk 2017 CD* under the **Utilities** directory. This is helpful to redistribute your reports to other users who do not have *Front Desk 2017* installed on their PC.

FRONT DESK 2017 SECURITY

Setting up Users

A valid username and password is required to access *Front Desk 2017*.

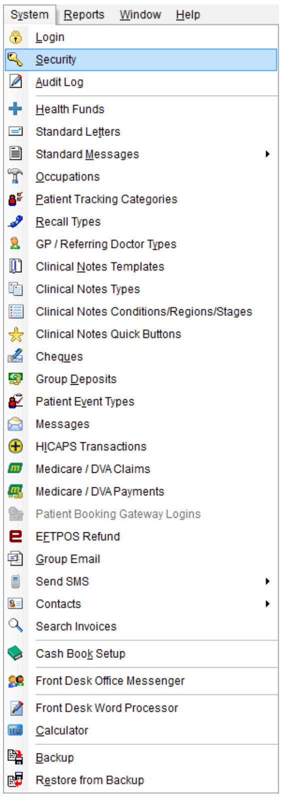
Depending on the access rights of the user, certain features or areas may not be available. For example, if a user does not have access to the appointment book, the appointment book icon will not be visible.

User access can be limited within *Front Desk 2017* for increased security or to make the system less overwhelming for novice users.

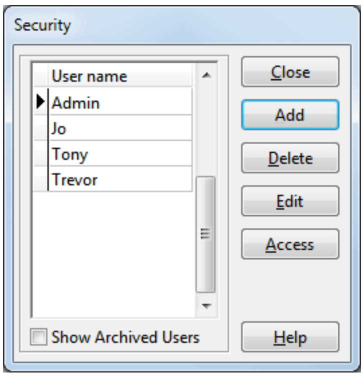
Front Desk 2017 - Note

Only the administrator **(Admin)** has the ability to create another user and modify access rights.

To create another user, select **Security** from the **System** menu.



The following **Security** dialog will be presented.



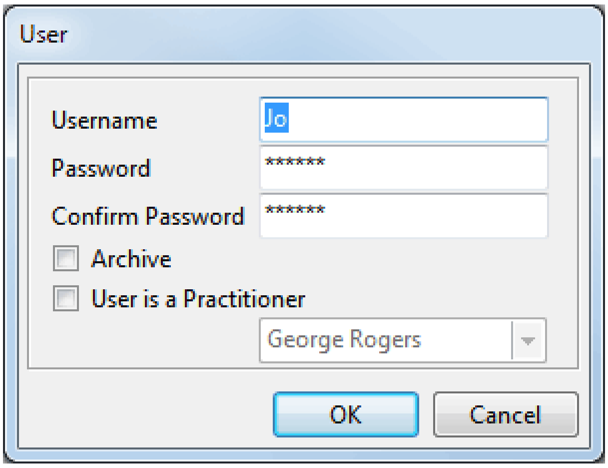
Setting up Users

To add a new user, click the **Add** button, to remove a user click the **Delete** button and to change a username or password click the **Edit** button.

We recommend that the default password for the Administrator **(Admin)** be changed when you start using the system for the first time. This will prevent other users from gaining access to the system using the default **Admin** password.

When creating a **User** the password for that user needs to be entered twice, once in the **Password** field and once in the **Confirm Password** field.

If the user is no longer active, **Archive** can be checked. This ensures that the user no longer has access to *Front Desk 2017*.



Note that the password is displayed with * characters for security reasons.

If the user is also a practitioner, select the **User is a Practitioner** option and select that practitioner's name from the drop-down list.

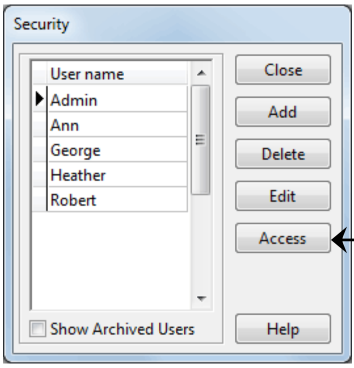
Front Desk 2017 - Tip

When adding new users, allow the user to enter their own password. This password should not be revealed to other users or to the administrator **(Admin)**, to ensure each user is responsible for their actions while logged into the system.

Setting up Users

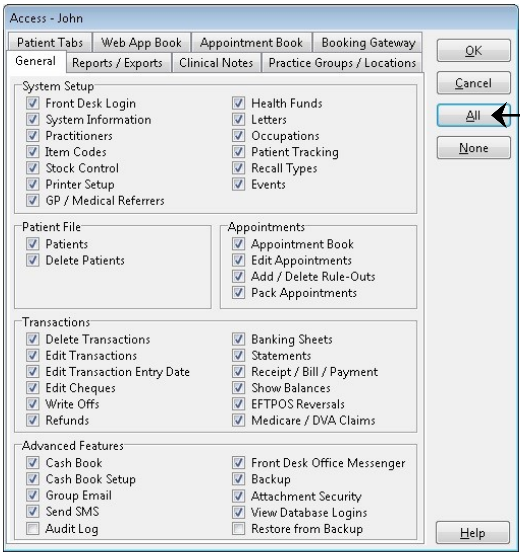
To set the access rights for a user highlight their name then click the **Access** button from the **Security** screen.

Select **Show Archived Users** to display users that have been archived.



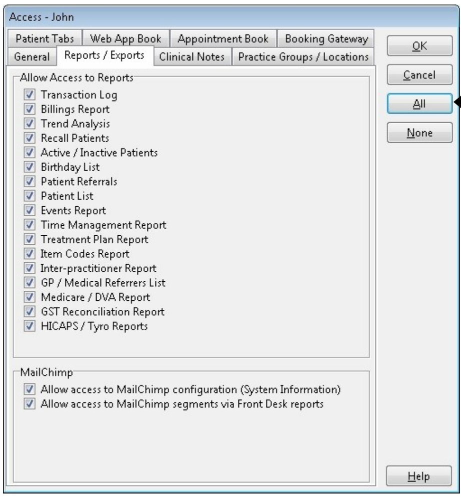
Access Rights

Select the areas available to that user and then select the **Reports/Exports** tab.



Select the **ALL** button to give access rights to all the functions

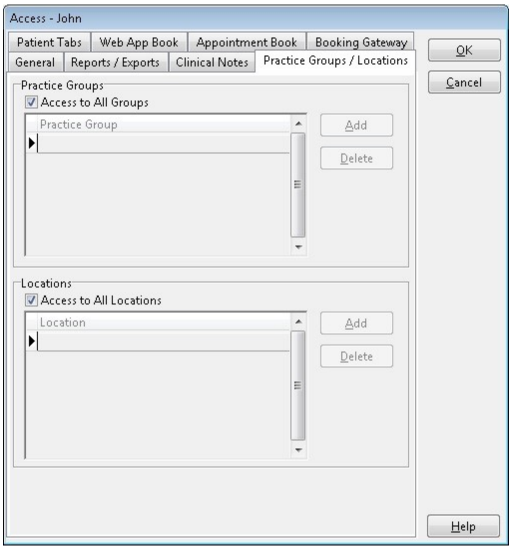
Select the reports and exports available to that user and then click **OK**.



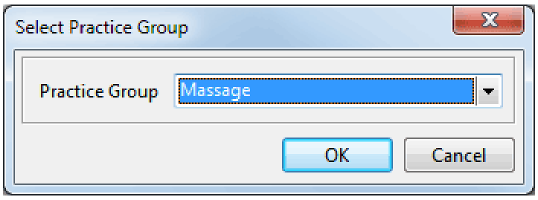
Select the **ALL** button to give access rights to all reports

Setting up Users

To set specific access to data from certain practice groups and/or locations select the **Practice Groups / Locations** tab. This feature allows users to only have access to information for certain practice groups or locations.



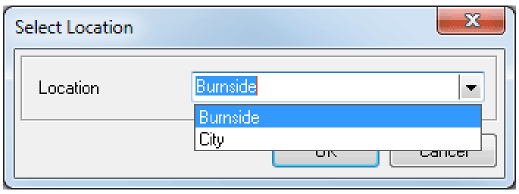
By default, **Access to All Groups** will be selected. If a user only requires access to a particular group(s) uncheck this option and click the **Add** button, selecting the specific **Practice Group** from the drop-down box.



Repeat this step if this user requires access to other practice groups.

If you have enabled **Locations** under the **Advanced** tab in **System Information**, the **Access** dialog will have another section where you can specify access to certain locations.

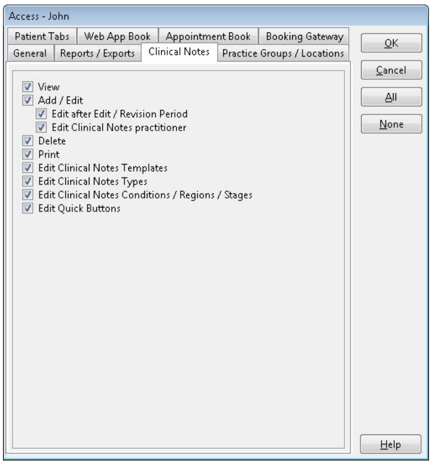
By default, **Access to All Locations** will be selected. If a user only requires access to a particular location uncheck this option and click the **Add** button, selecting the specific **Location** from the drop-down box.



Repeat this step if this user requires access to other locations.

Setting up Users

To set user access rights for clinical notes, select the **Clinical Notes** tab.



By default a user is granted complete access to clinical notes. A user's access can be changed by selecting the following options.

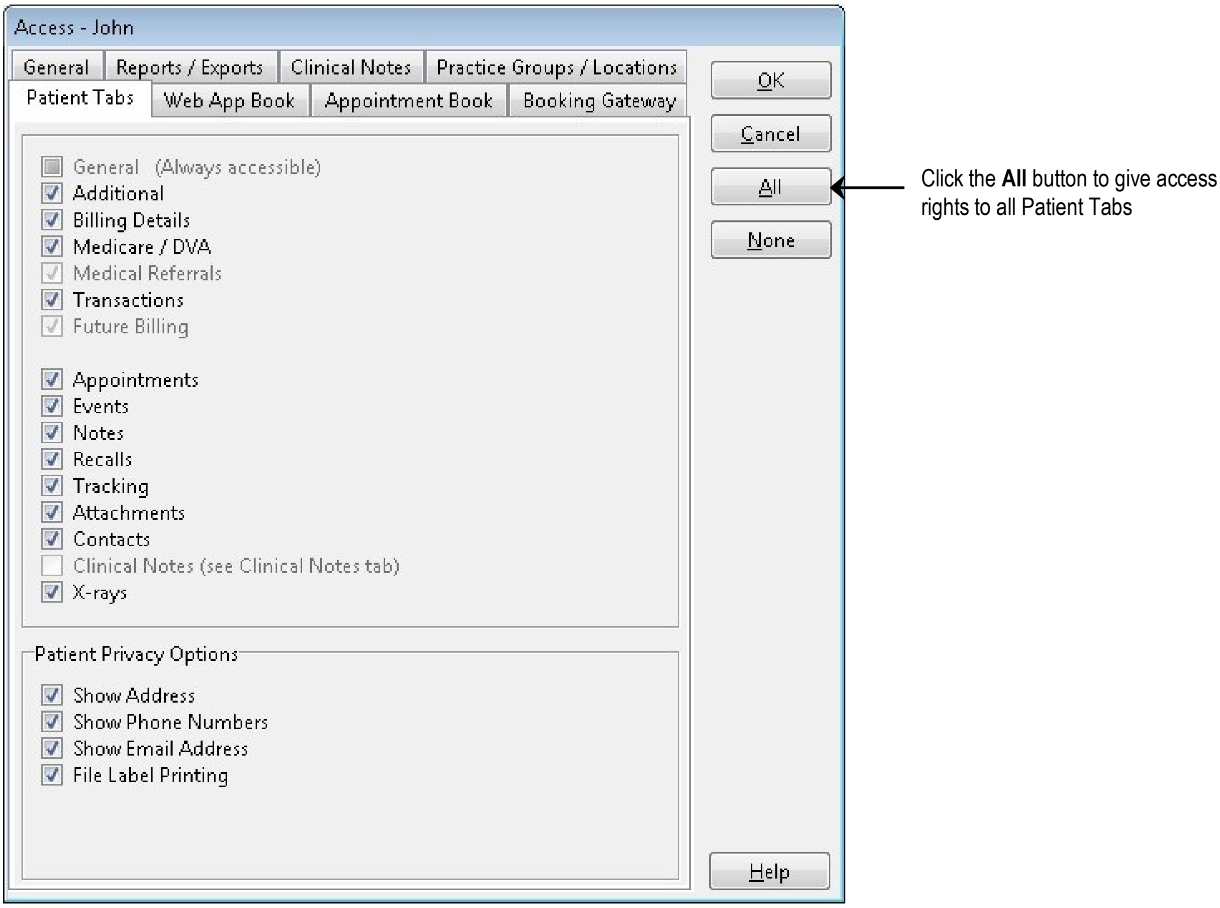
- **View** allows the user to view clinical notes. This includes any embedded objects (Microsoft Word).
- **Add / Edit** gives the user access to adding or changing clinical notes.
- **Edit after Edit / Revision Period** allows a user to edit clinical notes after the **Edit / Revision Period** for a note has expired.
- **Edit Clinical Notes practitioner** allows a user to change the practitioner's name recorded on clinical notes.
- **Delete** allows the user to delete clinical notes.
- **Print** allows users to print clinical notes
- **Edit Clinical Notes Templates** allows the user to create and edit clinical notes templates.
- **Edit Clinical Notes Types** allows the user to create and edit clinical notes types.
- **Edit Clinical Notes Conditions / Regions / Stages** allows the user to create and edit clinical notes conditions, regions and stages.
- **Edit Quick Buttons** allows the user to create and edit clinical notes quick buttons.

Front Desk 2017 - Tip

The **Edit / Revision Period** can be set on the **Clinical Notes** tab in **System Information**. Additional restrictions for clinical notes are available on the **Clinical Notes ->Security** tab of the **Practitioner** file.

Setting up Users

To set the user's access to different tabs in the patient file, select the **Patient Tabs** tab.

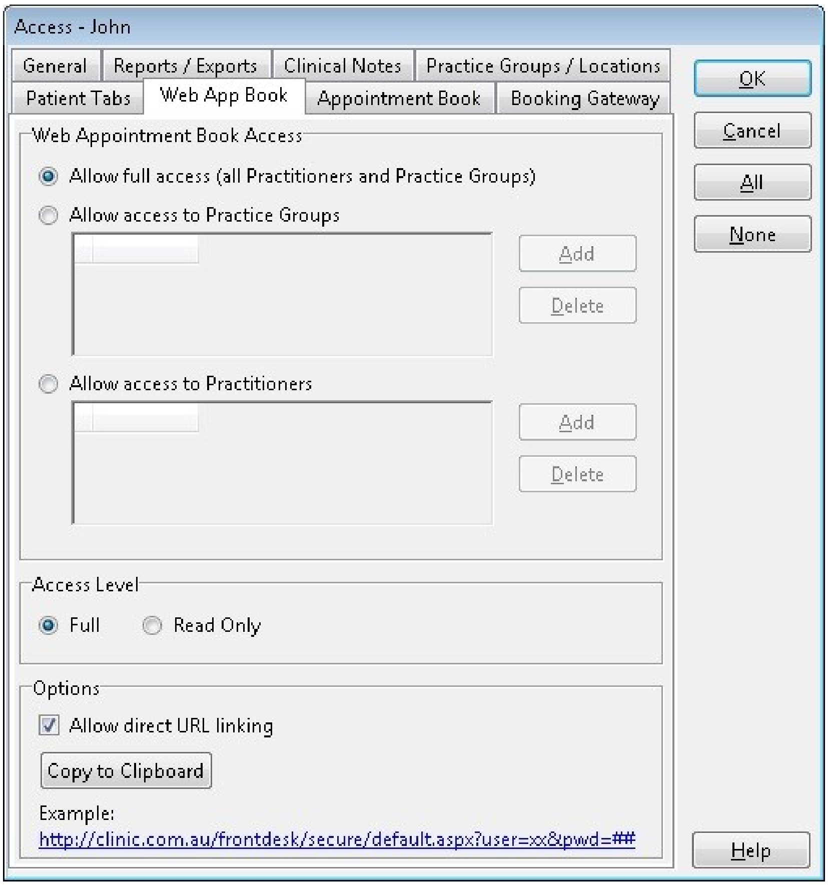


Access to patient tabs can be modified by checking or unchecking the desired section.

Patient Privacy Options can be used to restrict user access to certain patient information in the patient file.

Setting up Users

To set access to the Web Appointment Book select the **Web App Book** tab.



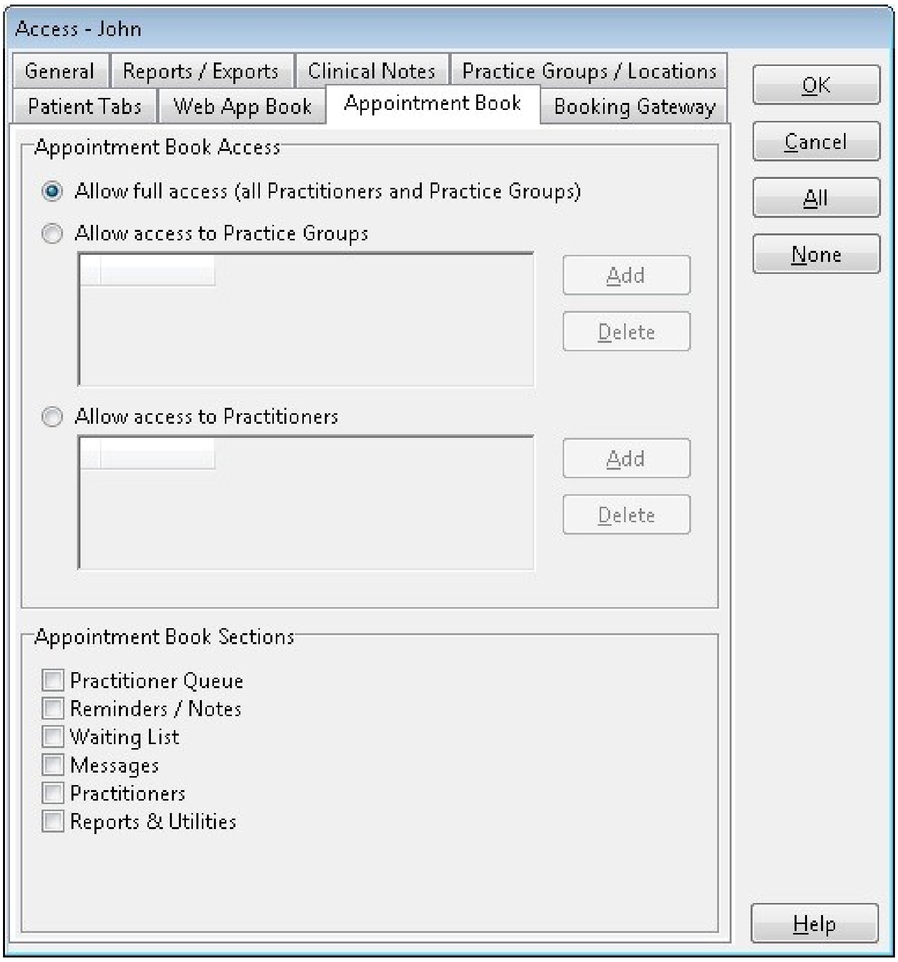
By default a user is granted full access to the Web Appointment Book. A user's access can be changed by selecting the following options.

- **Allow Full Access (all Practitioners and Practice Groups)** gives the user full access to the Web Appointment Book.
- **Allow access to Practice Groups** gives access to specified Practice Groups only.
- **Allow access to Practitioners** gives access to certain Practitioners.
- **Access Level** can restrict access to **Read Only**

The **Options** allows users to setup the **Allow direct URL linking** option for the Web Appointment Book. This setting allows users to access the Web Appointment Book without the need to manually enter a username and password.

Setting up Users

To set access to the Appointment Book select the **Appointment Book** tab.



By default users are granted full access to the Appointment Book. User access can be changed by selecting the following options.

- **Allow Full Access (all Practitioners and Practice Groups)** gives the user full access to the Appointment Book.
- **Allow access to Practice Groups** gives access to specified Practice Groups only.
- **Allow access to Practitioners** gives access to certain Practitioners.

The **Appointment Book Sections** allows users to restrict access to particular sections of the Appointment Book.

Audit Log

The *Front Desk 2017* system records events such as

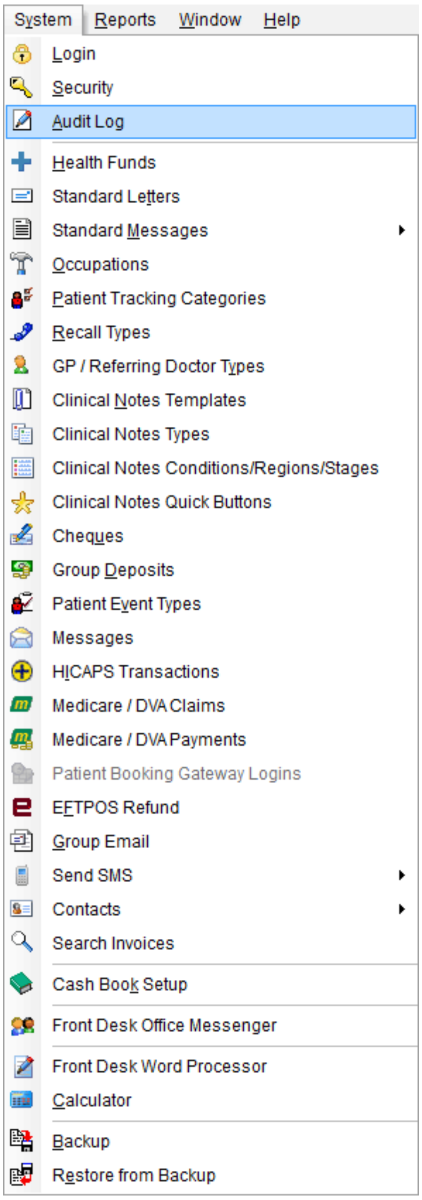
- log in and log out times of users
- deletion and / or editing of transactions, appointments and patient files
- previewing / printing / exporting of reports

We recommend the Audit Log be viewed regularly by system owners to help highlight any discrepancies in the use of *Front Desk 2017*. While most entries in the Audit Log will be genuine changes that have been made to the system, it does help to detect any suspicious non-authorised activity by users.

Front Desk 2017 - Note

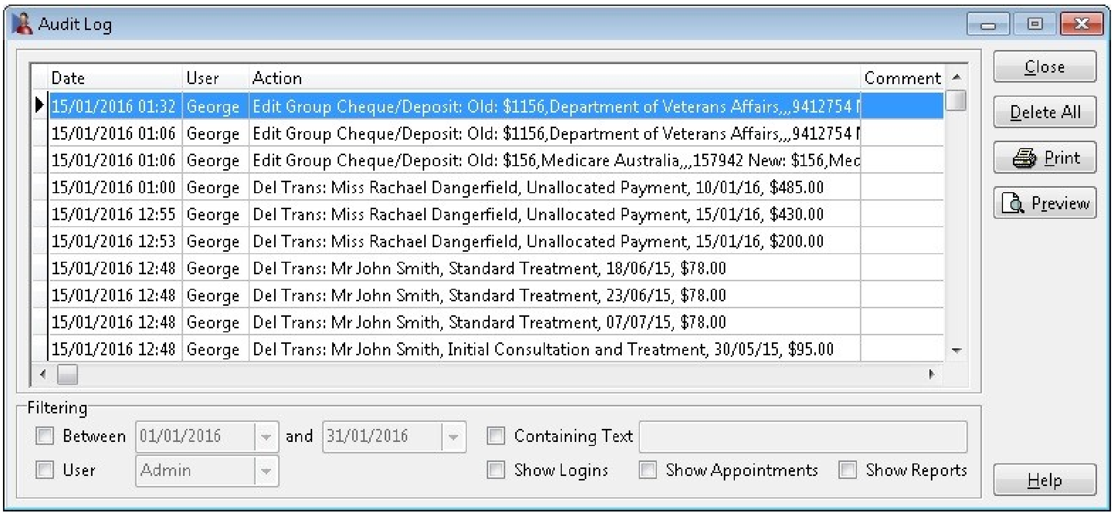
Access to the **Audit Log** should only be given to system owners and trusted users of the system.

To access the Audit Log select **Audit Log** from the **System** menu.



Audit Log

The **Audit Log** dialog will be displayed as below.



To view entries in a specified date range, select **Between** and enter the date range.

To view logins and/or appointments select **Show Logins** or **Show Appointments**. **Show Reports** displays reports that have been printed, previewed or exported. If you wish to delete all the contents of the Audit Log click **Delete All**.

Note that once the Audit Log has been deleted, it cannot be recovered and no record of these entries will remain.

The audit log can be **Previewed** or **Printed** as a report by clicking these buttons.

To view all Audit Log entries for a particular user, select the **User** option and select the desired username.

Audit log entries containing specific text can be filtered by selecting the **Containing Text** option.

FRONT DESK 2017 BACKUP

Backup

It is very important to back up the data from any system that contains valuable information. **Users must make daily backups of the data contained in *Front Desk 2017.***

In the unlikely event of a serious hardware fault, theft, fire, natural disaster or accidental deletion of files, your data may be restored into Front Desk® from a previous backup.

Backups can also be used to transfer data between two independent computers running *Front Desk 2017. Front Desk 2017* offers a built in backup to make this task easier. To follow are the commonly available backup media types and their suitability for Front Desk® backups.

Flash Drives

RECOMMENDED
USB flash drives can be connected directly to a computer's USB port without cables and acts as a storage device. These portable drives offer a good way of exchanging data between any PCs. They come in various storage capacities however we recommend a minimum of 4 GB.

External HDD
USB or Ethernet

RECOMMENDED
External USB / Ethernet Hard Disk Drives are a good way to back up your data in *Front Desk 2017*. They are safe, fast and easy to use, especially in a networked environment.

Cloud Offsite Backup

RECOMMENDED WITH CAUTION
This type of backup requires expert technical knowledge to be set-up and used correctly. Users must contact Smartsoft for a special additional utility, provided at no charge, or use specialised backup software which is capable of backing up MS SQL Server data.

CD / DVD Writers

NOT RECOMMENDED
We do not recommend CD / DVD writers, as backing up and managing your CD / DVD media is not a trivial process. Further, they can be easily damaged if not handled correctly. Many hardware suppliers will unknowingly recommend this type of backup not completely understanding how it will be used. Our experience has shown that this is a poor choice for backing up data in *Front Desk 2017*.

Front Desk 2017 Backup

Backup

Front Desk 2017 has an integrated backup feature to help users backup their data. This backup feature uses the industry standard *ZIP* format to compress and backup data.

A suggested backup routine is to have one set of backup disks for each work day. The Monday disk(s) is used every Monday, the Tuesday disk(s) for every Tuesday and so on. It may also be a good idea to keep another backup set at a secure location offsite. We suggest that backup disks are kept in a safe place, preferably not with the computer and in a fire-resistant location.

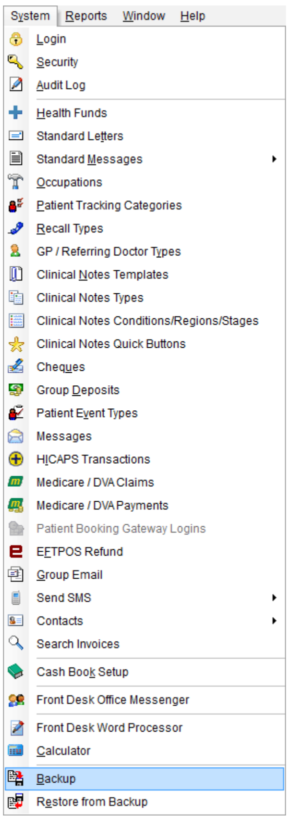
If any assistance is required in developing your backup strategy, please contact Smartsoft technical support.

Front Desk 2017 - Note

In a multi-user environment with more than one workstation, *Front Desk 2017* can be backed up on one machine while being used concurrently on other machines.

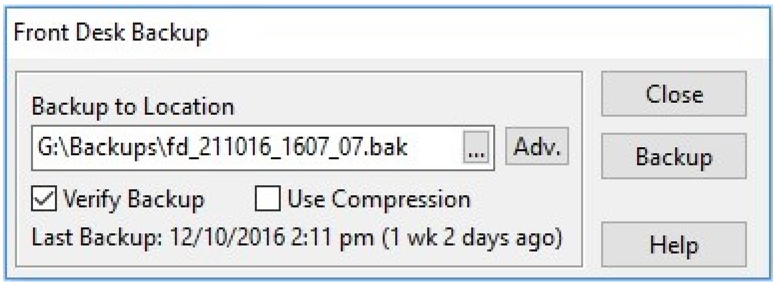
To perform a backup select the **Backup** icon from the **Toolbar**

or from the **System** menu.



Backup

The **Front Desk Backup** dialog will appear.

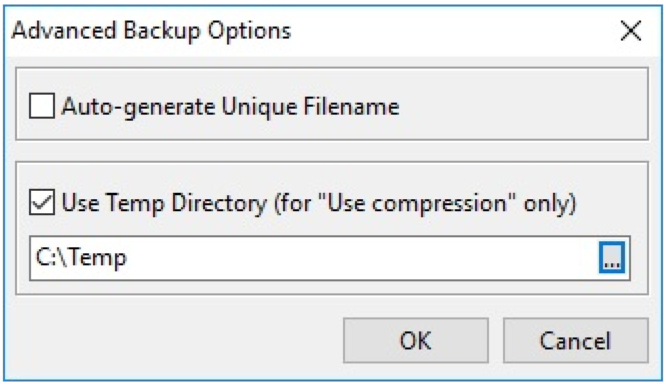


Click the browse button ... to search for the location to save the backup.

By deselecting the **Use Compression** option, Front Desk will create a larger backup file but the backup will generally take less time to complete. Restore times are also generally faster for uncompressed backups.

The backup time can be further reduced by deselecting the **Verify backup** option, however this increases the risk of an invalid backup being produced. To ensure that the backup has been copied to your backup media successfully, leave the **Verify** option selected.

Click the **Adv.** Button to view the advanced backup options.



Auto-generate Unique Filename allows users to specify that a unique filename is generated each time a backup is performed. This is useful when wanting to store more than one backup on the same backup media.

The *Front Desk 2017* backup has a facility to back up to a temporary local drive and then copy the backup file to another location that is generally on another drive such as a flash drive. This feature can both speed up and improve the reliability when backing up to certain types of removable media or over slow networks.

To use this feature, select the **Advanced** button and check the **Use Temp Directory** option. To select an alternate directory for the creation of the temporary file use the browse button found at the end of the line containing the directory path.

Front Desk 2017 Backup

Backup

Please ensure the **Temp Directory** selected has been allowed read and write access for the Windows user *Everyone*. This will allow SQL Server to write to the directory without issue.

Front Desk 2017 will automatically remember which drive you last backed up to.

To begin a backup click the **Backup** button and follow the on-screen prompts. The Front Desk 2017 backup will only backup your Front Desk database, and specifically will not back up other information or data on your computer.

Please note that most external 'File Only' backup programs may not backup the Front Desk database correctly as these files are always in use by Microsoft SQL Server. If you are using an external, please ensure that it is Microsoft SQL database aware.

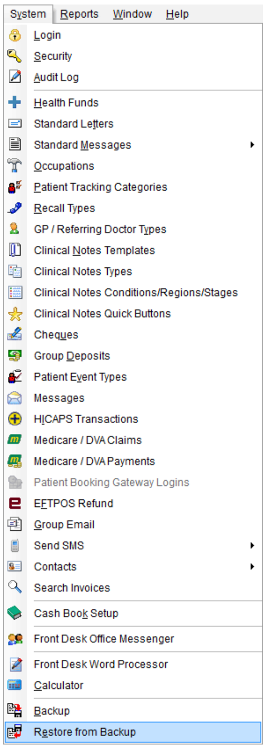
Restore

The restore feature allows users to restore data from a previous backup. This option is available to the administrator **(Admin)** and other authorised users.

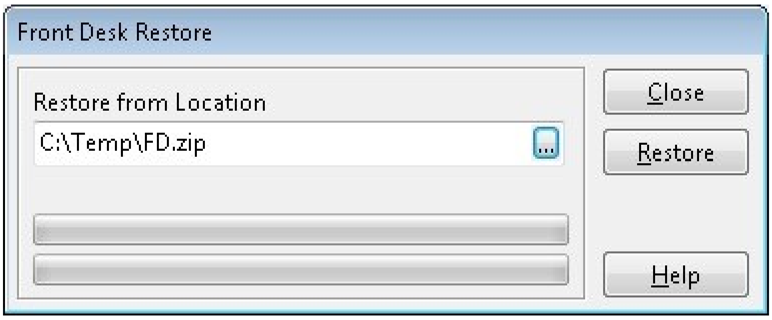
Caution should be used when restoring data from a previous backup as all current data will be overwritten. For any queries on using this feature, please contact Smartsoft (Australia) Pty Ltd.

The restore feature should generally only be used to transfer data from one computer to another computer, perhaps when taking a copy of the practice data to a home computer.

To perform a restore select **Restore from Backup** from the **System** menu.



The **Front Desk Restore** dialog will appear.



Click the browse button to find the file to restore.

To begin the restore click the **Restore** button and follow the on-screen instructions.

Working with Patients

Patient - Creating a patient file

When working with patient files it is important to know how to:

- Create a new patient file; and
- Find an existing patient file

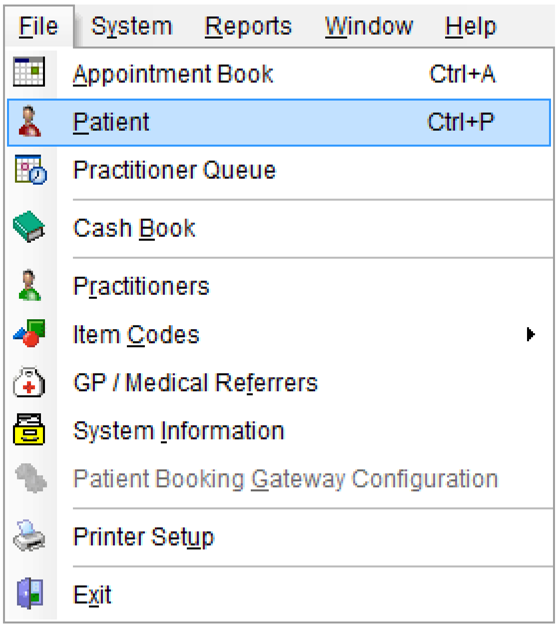
There are 4 ways to create a new patient file:

- From the **Search on Patient** window
- From an open **Patient File**
- 'On the fly' while making an appointment in the **Appointment Book**
- From within a **Group Appointment**.

The first two methods will be covered in this section while the third will be covered within the Appointment Book section.

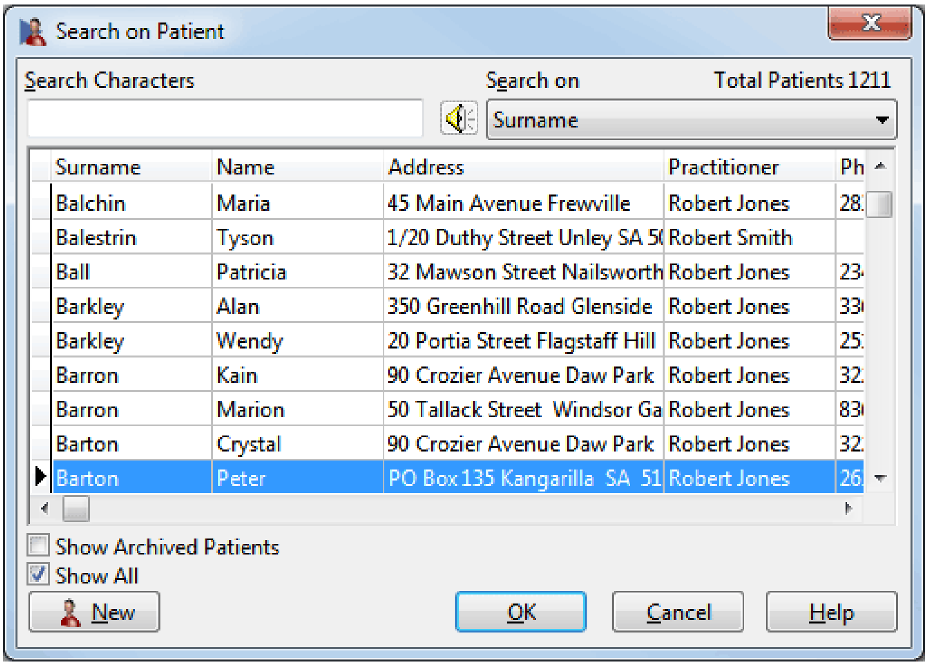
To create a new patient, select the **Patient** icon from the **Toolbar**

or from the **File** menu.



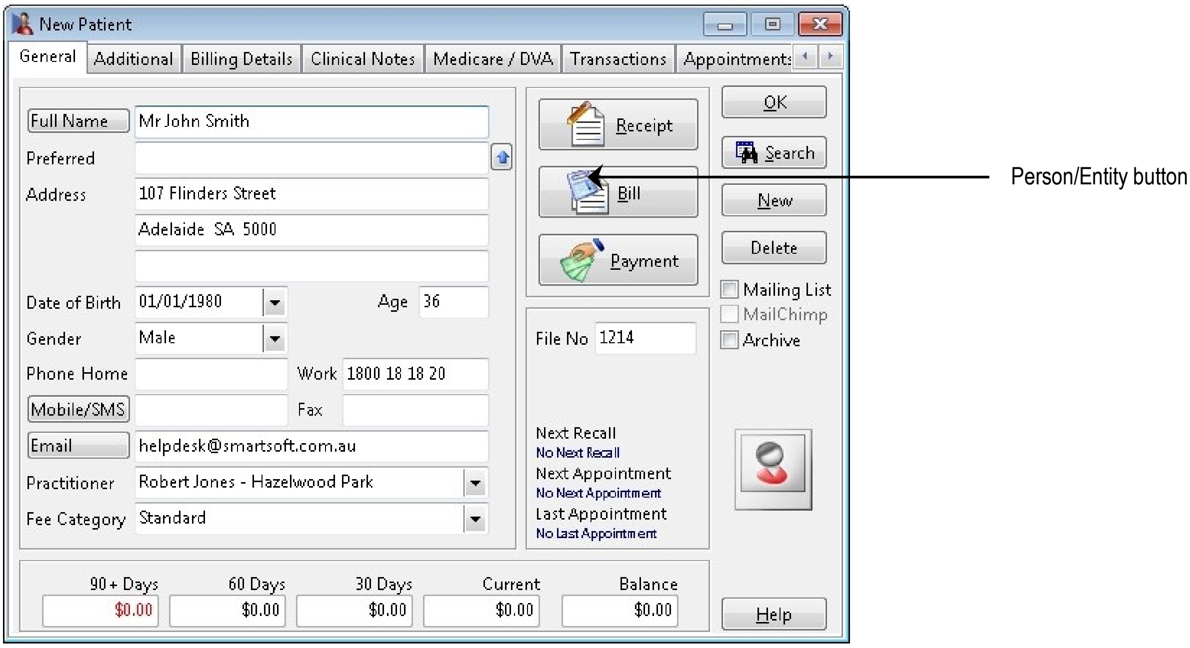
Patient - Creating a patient file

The **Search on Patient** window will be displayed.



To create a new patient file click the **New** button.

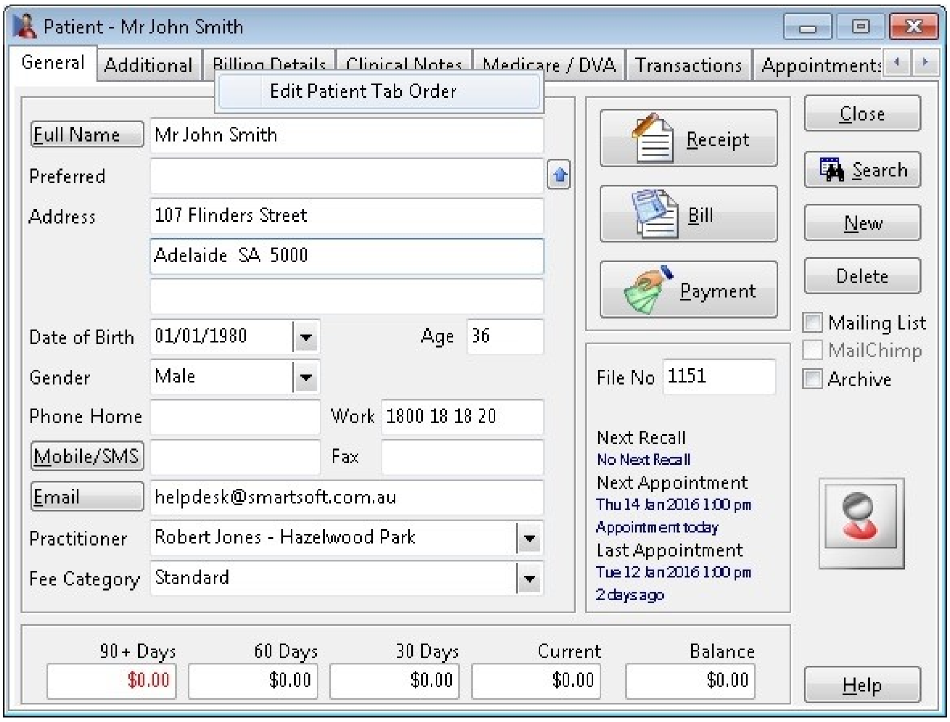
A new patient file will appear.



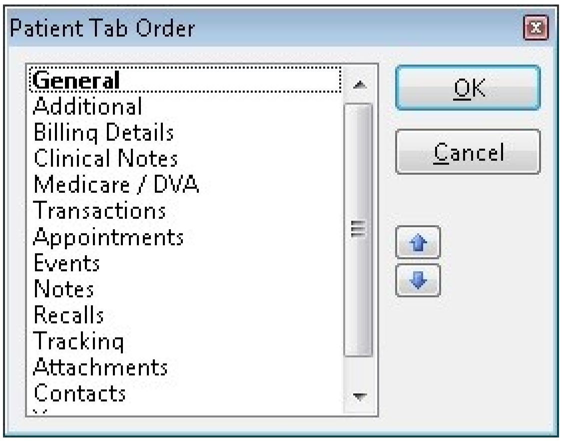
Patient - Tab Order

The tabs in the patient file can be customised in your order of preference.

From a patient file right click on any tab along the top and select the **Edit Patient Tab Order** option.



The following screen will appear



Highlight the tab you wish to move and use the up and down arrows to change its position.

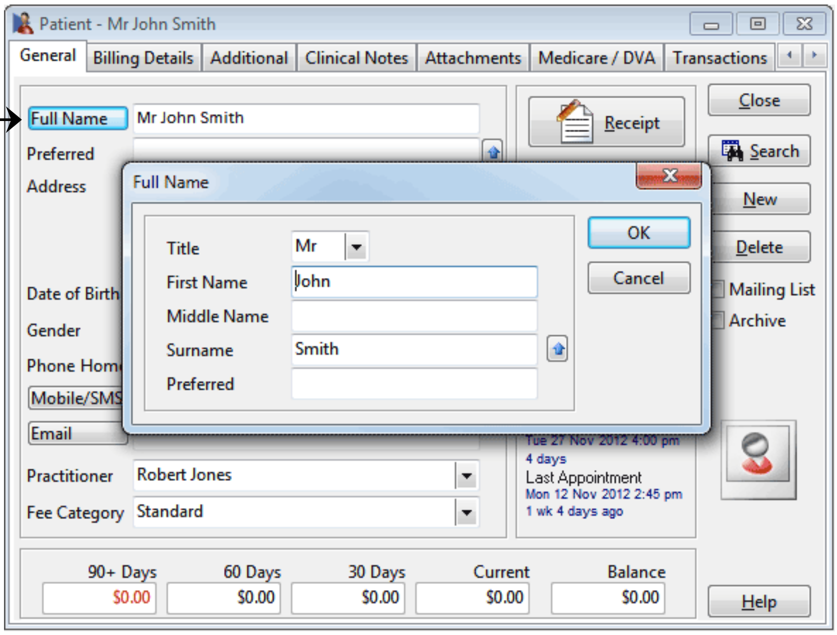
Click **OK** to save these settings.

WORKING WITH PATIENTS

Patient - General Information

When editing the **Full Name** field, a **Full Name** dialog will open with the cursor positioned in the appropriate field. This enables **Title**, **First Name**, **Middle Name, Surname** and **Preferred Name** to be entered. The **Full Name** dialog can also be opened by clicking on the **Full Name** button.

Full Name option

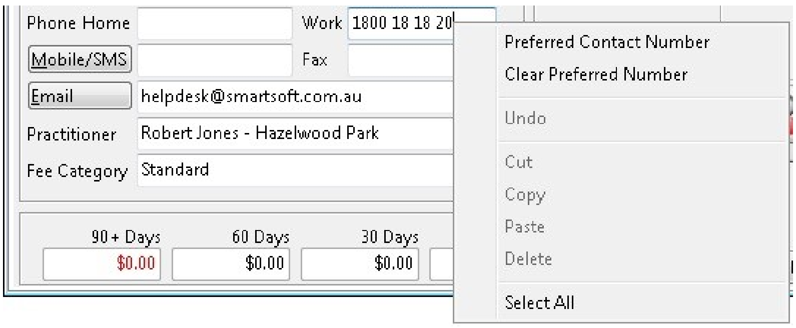


A patient **Title** can either be typed in, or selected from the drop-down box.

Use the **Person/Entity** button to enter details for an entity rather than a person, e.g. 'Department of Veteran Affairs' or 'WorkCover'. This option will provide one name field rather than the separate fields title, first name and surname fields.

Enter the patient's details such as address, phone numbers and date of birth; use the **<TAB>** key on your keyboard to move to the next field.

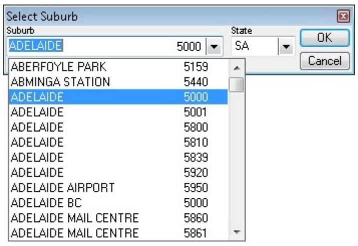
To set preferred contact number, right click in the **Home Phone, Work Phone** or **Mobile/SMS** fields and select **Preferred Contact Number**. To clear this selection simply select another field or right click and select **Clear Preferred Number**.



To enter the patient's **Suburb** and **Postcode**, **double click** or press **enter** on an address line. This will display the **Select Suburb** screen.

WORKING WITH PATIENTS

Patient - General Information

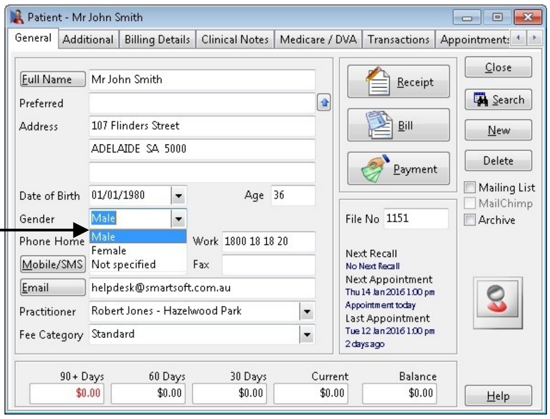


Start typing the suburb in the **Suburb** field to reduce the list to only those suburbs starting with the characters entered. Alternatively, click on the drop-down box and scroll down to the suburb you require. Click on the **State** drop-down box to search for suburbs in other states.

Select the patient's **Practitioner, Fee Category** and **Health Fund**. To set up standard health funds select **Health Funds** from the **System** menu. Click **Add**, enter the name of the health fund and click **OK**.

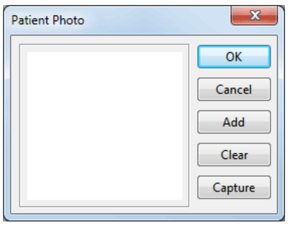
The patient’s gender can be set by either selecting Male or Female from the drop-down box or by typing “**M**” or “**F**” in the **Gender** field.

Patient Gender



If using custom file numbers you will be able to enter a number in the **File No.** field. Select the **Mailing List** option to put the patient on a selected mailing list. Click the **Close** button or the [**X**] button to close the patient file; a prompt to save will appear if data has changed within the patient file.

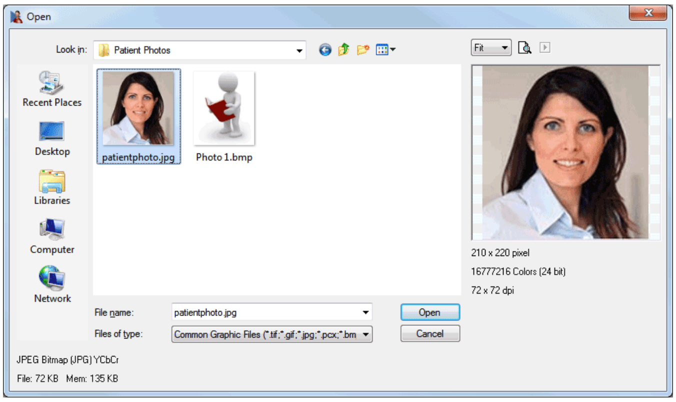
To import a picture of the patient into their file, left click on the photo diagram and click the **Add** button and locate where the picture file has been saved.



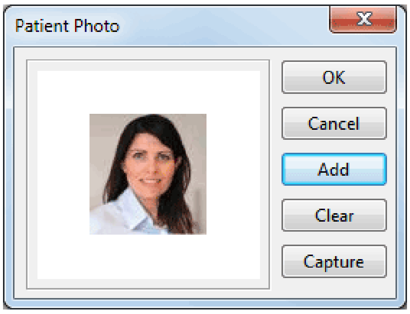
Alternatively, patient photos can be captured using a camera or webcam connected to your computer by clicking on the **Capture** button. Right click on the **Capture** button for additional capture options.

Patient - General Information

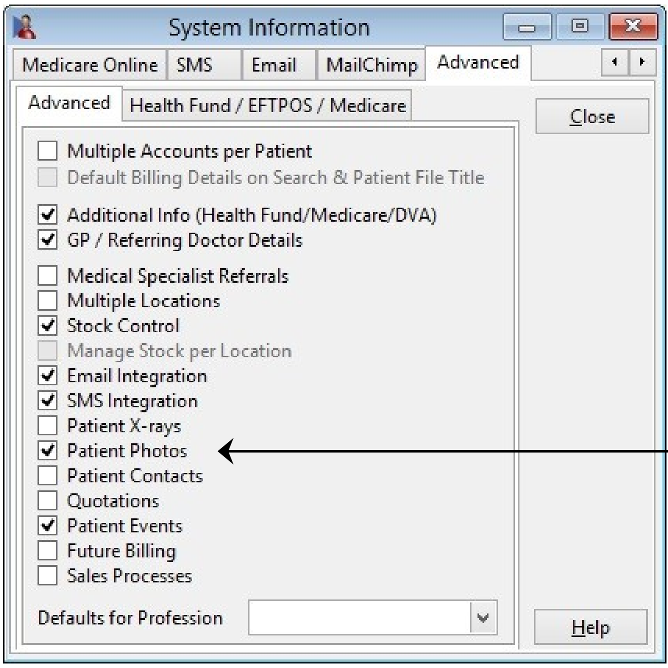
Select the particular image to insert and click **Open**.



The picture will automatically decrease or increase in size to fit the photo section on the patient file. Click **OK** to insert the file.



The patient photo feature is an optional advanced feature which can be disabled from the **Advanced** tab in **System Information**.

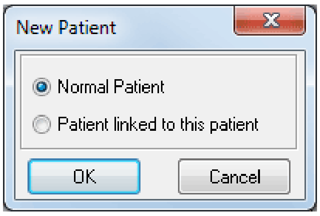


Patient photo option

Patient - General Information

When in a patient file click the **Search** button to view another patient's details. This will close the current patient file and open a new one.

To create a new patient, click the **New** button and then select **Normal Patient** from the **New Patient** dialog as shown below. If the new patient is to be linked to the current patient then select **Patient Linked to this patient** option - all bills will be sent to the current patient.



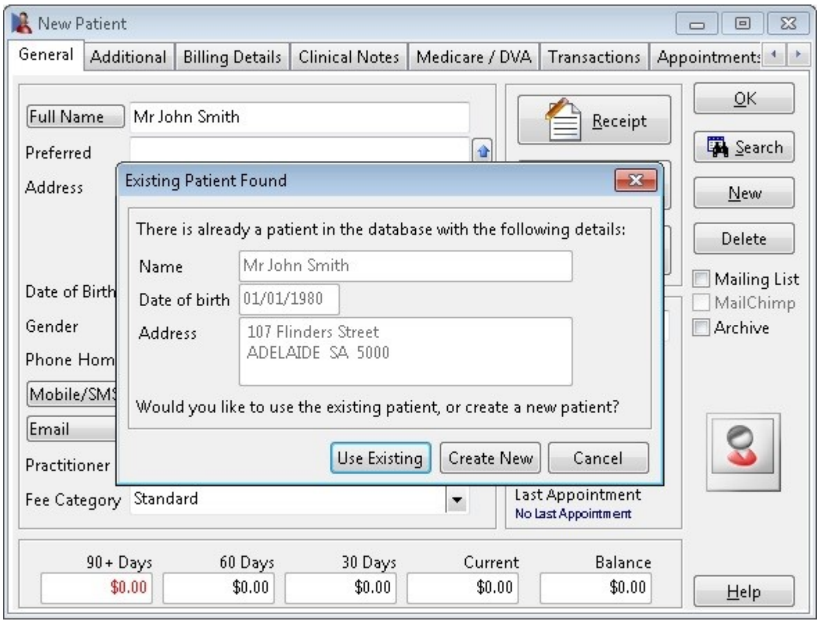
The **Delete** button is used to delete a patient file.

Front Desk 2017 - Note

Patient files can only be deleted if the patient has a zero balance and the *Front Desk 2017* user has the user access rights to use this function.

When adding a new patient, *Front Desk 2017* will check, by default, for existing patients with the same name and date of birth, to avoid adding duplicate patient details. This checking feature can be modified to check for different criteria when detecting duplicates and is located under the **Defaults** tab in **System Information**.

If a patient who is already in the system is created you will be prompted with the following screen.



Click the **Use Existing** button to use the patient file already in the system or click the **Create New** button to add a second file for this patient. Click **Cancel** to terminate this process.

Patient - Billing Details

Third Party Billing

Patients may require their accounts to be sent to a third party, e.g. WorkCover, Department of Veteran Affairs, an insurance company or a family member.

Front Desk 2017 allows for 2 types of third party billing:

- Individual or
- Linked

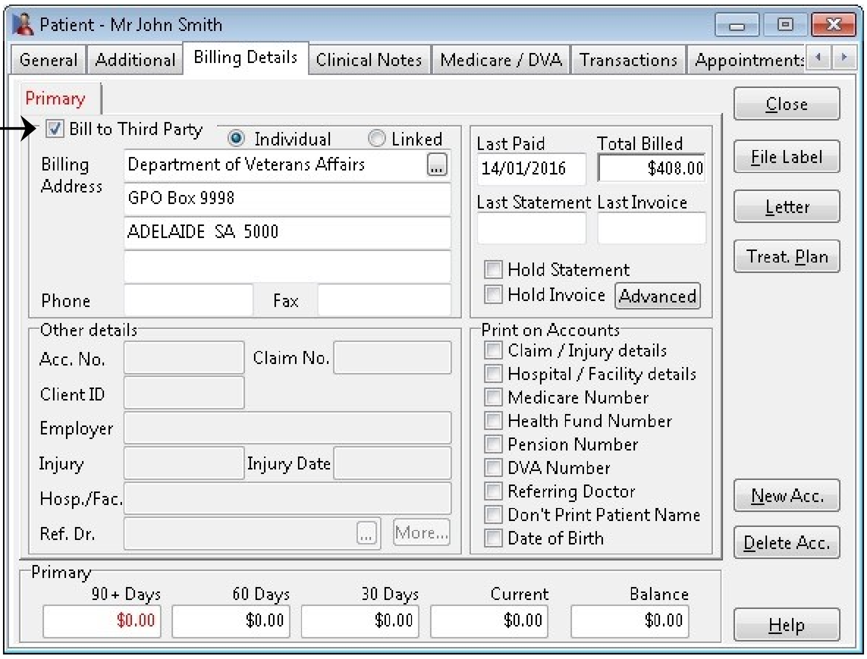
The **Individual** option should be selected if a separate statement is required by the third party for each patient. For example, commonly each patient billed to *WorkCover* will have a separate statement. It is important that statements be kept separate, as several claims officers may handle the claims submitted. In this case, one statement containing all WorkCover patients would not be suitable. When selecting **Individual** third party billing, either enter the billing details manually or if the party has been entered into *Front Desk 2017* as a patient then click the browse button and search for that entity.

The **Linked** option should be selected when dealing with *Department of Veteran Affairs*, *a small insurance company*, an *employer* or *family*. In this instance all patients will be grouped together and will appear on the one statement. When selecting **Linked** third party billing the browse button **must** be used to enter the billing details. You cannot enter the billing details manually with this option.

Select the **Billing Details** tab from the patient file.

If the patient has a third party responsible for the account, check the **Bill to Third Party** option and select either **Individual** or **Linked**.

Bill to third party option

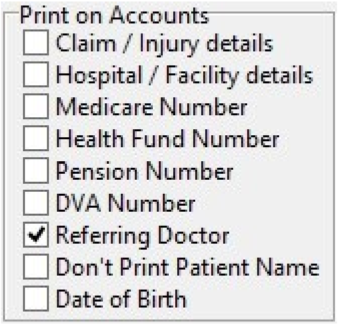


Front Desk 2017 - Tip

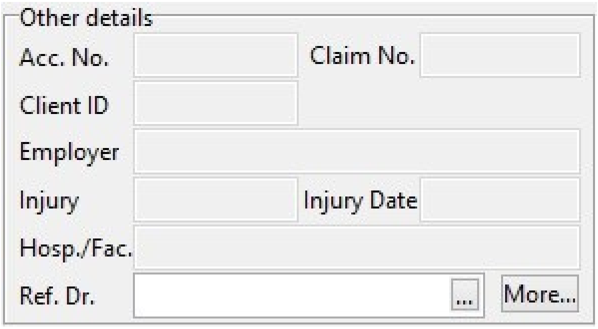
If *Multiple Accounts* for each patient file is required for your practice, refer to the **Advanced Features** section at the end of this manual.

Patient - Billing Details

If the referring doctor’s name and provider number needs to be printed on accounts, select **Referring Doctor** from the **Print on Accounts** option.



This enables the Referring Doctor field in the bottom left of the Billing Details tab.



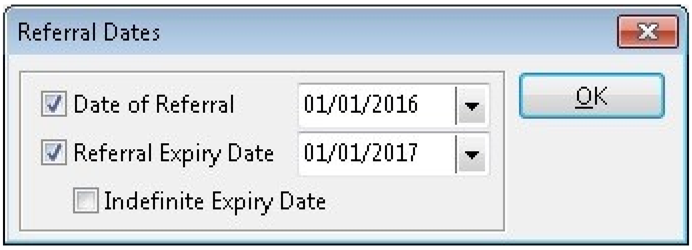
When entering a referring doctor there are two options:

Option 1 - Click the browse button and search for the doctor's name. If the doctor’s name is not found click the **New** button. This option will add the doctor to the GP Referrer list.

Option 2 - The referring doctor’s name can be manually entered and not registered with *Front Desk 2017*. In this case the doctor will not added to the GP Referrer list.

Patient - Billing Details

Click the **More...** button if you wish to add a **Date of Referral** and/or **Referral Expiry Date** with this referring doctor. On occasion medical referrals may be approved for indefinite periods, at which time the **Indefinite Expiry Date** option should be checked.



To enter additional information such as **Account Number, Claim Number, Employer, Injury** or **Injury Date** check the appropriate options in the **Print on Accounts** section.

Printing of the patient name can be suppressed on invoices and statements for privacy reasons, by using the **Don't Print Patient Name** option found in the **Print on Accounts** section.

Some general accounting information can be found in **Last Paid**, **Last Statement** and **Total Billed** fields. If the printing of a patient's statement or invoice needs to be held for some reason, such as when waiting for a claim number, select the **Hold Statement** or **Hold Invoice** option.

Patient – Billing Details (File Labels)

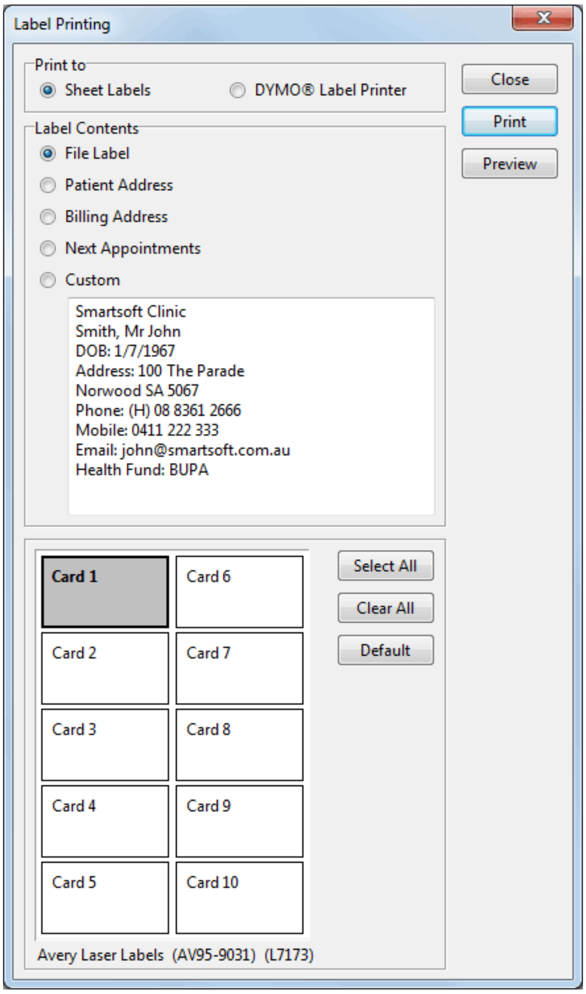
File Label
To print the patient's details onto a label, click the **File Label** button.

Select **Sheet Labels** to print directly onto Avery Laser Label paper, model number AV95-9031 (L7173).

Select **DYMO® Label Printer** to print via a DYMO® printer. Please note this requires version 8.3 or above of the DYMO® software installed and configured.

The **Label Contents** can be adjusted to determine what information appears on the label by selecting the appropriate option.

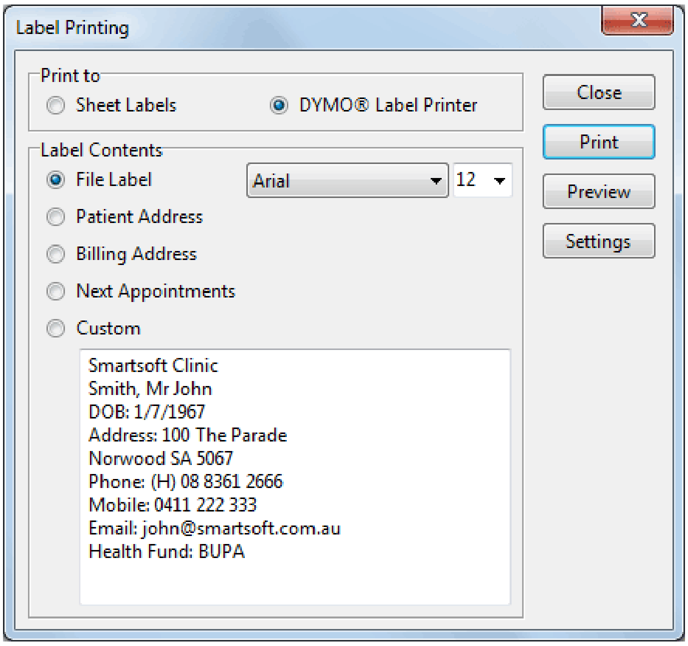
File Label will print the clinic name, patient name, date of birth, address, phone numbers, email address and associated health fund.
Patient Address will print only the patient's primary address details.
Billing Address will print the billing address as listed under Billing Details.
Next Appointments will print up to three future appointment details.
Custom will allow the user to enter customised text.



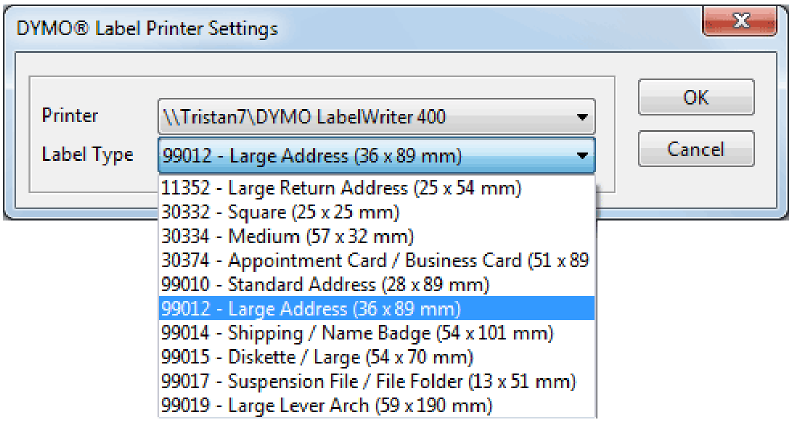
Patient - Billing Details (File Labels)

When printing to **Sheet Labels** more than one label can be printed by holding down the **<CTRL>** key on the keyboard and selecting the required labels. To print out all 10 labels for the same patient, click the **Select All** button.

To clear a selection of the labels, click the **Clear All** button and to reset the labels back to the original settings select **Default**.



When printing to a DYMO® Label Printer, click settings to select the appropriate DYMO® printer and label size.



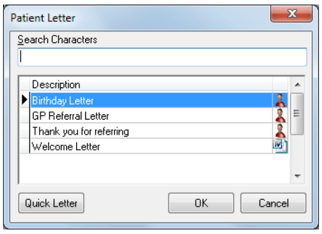
Click **OK** to confirm your selection.

To print an individual DYMO® Label click **Print**.

Click **Preview** to view the label prior to printing.

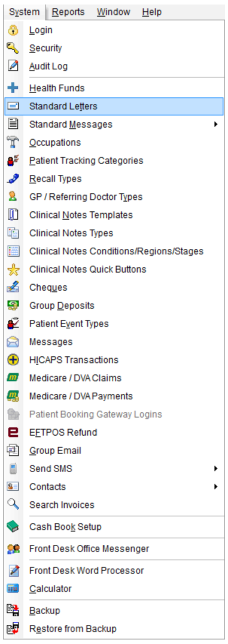
Patient – Billing Details (Letters)

To use the standard letter function, click the **Letter** button. The following **Patient Letter** dialog will appear. Letter templates can either be in Front Desk Word Processor or Microsoft Word® format.



Select the appropriate letter from the **Description** box or if you are writing a personalised letter use the **Quick Letter** option. Use the **Search Characters** to narrow down your search when working with a large number of standard letters.

To add a standard letter, select **Standard Letters** from the **System** menu.



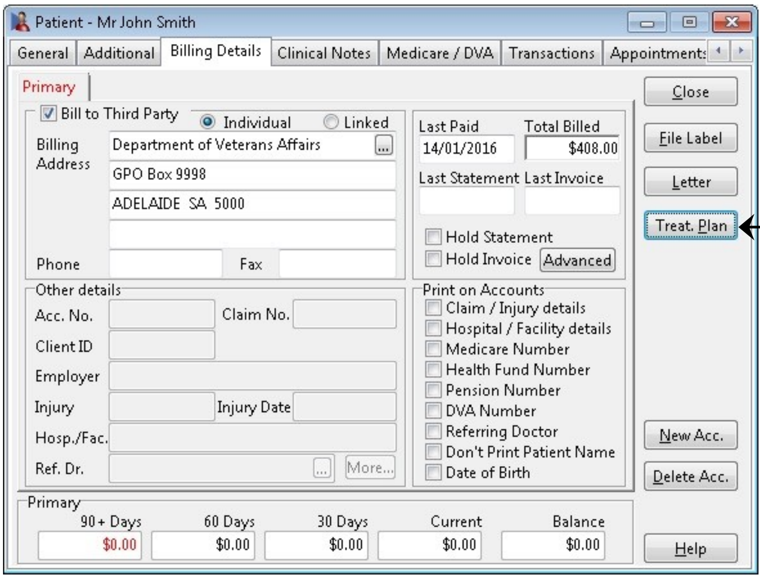
Click **New** to create a new standard letter, or click **Add** to import an existing standard letter.

For more details on setting up **Standard Letters** please refer to the **Front Desk Word Processor** or **Integration with Microsoft Word®** section in this manual.

Patient – Billing Details (Treatment Plan)

The **Treatment Plan** feature allows you to track and manage the number of treatments/consultations with a patient from a set date. This is particularly useful when dealing with third-party payers that approve a number of treatment visits and require the submission of a progress report or treatment plans for continuing care.

To start a **Treatment Plan** for a patient, go to the **Billing Details** tab of a patient file and click the **Treat. Plan** button.

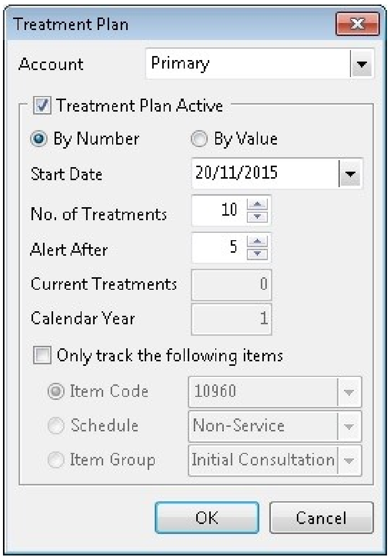


Treatment Plan button

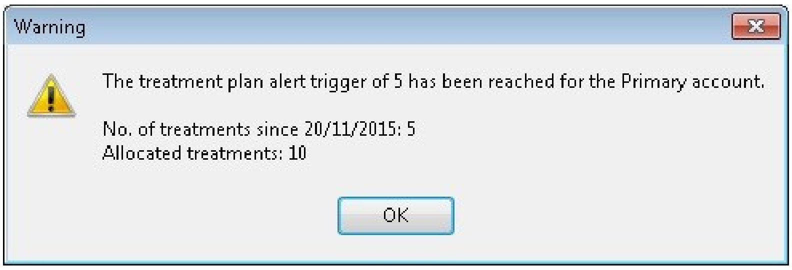
Check the **Treatment Plan Active** option and set the following options:

- **By Number** - Will calculate the number of treatments that the patient has had from the start date.
- **By Value** - Will calculate the amount billed for each consultation from the start date.
- **Start Date** - The starting date of the current treatment plan for this patient.
- **No. of Treatments** - Total number of visits approved.
- **Alert After** - Alert (display warning message) after this patient has had this number of transactions.
- **Only track the following items** - Allows you to track particular **Item Code**, **Schedule** or **Item Group** for a treatment plan.
- **Current Treatments** – Will calculate the number of transactions the patient has had from the start date OR will calculate the total value of current treatments from the start date.
- **Calendar Year** – Will calculate the number of transactions the patient has had within the current calendar year OR will calculate the total value of transactions the patient has had within the current calendar year.

Patient - Billing Details (Treatment Plan)

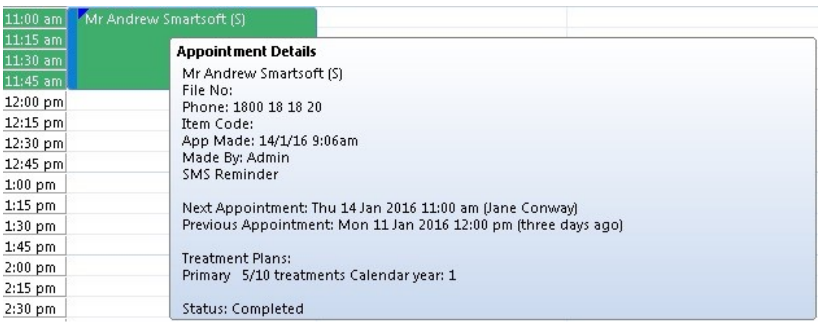


When transacting a patient with an active **Treatment Plan**, a warning will appear if the **Alert After** limit has been reached. This will detail the total number of treatments available on the plan, and the current amount reached.



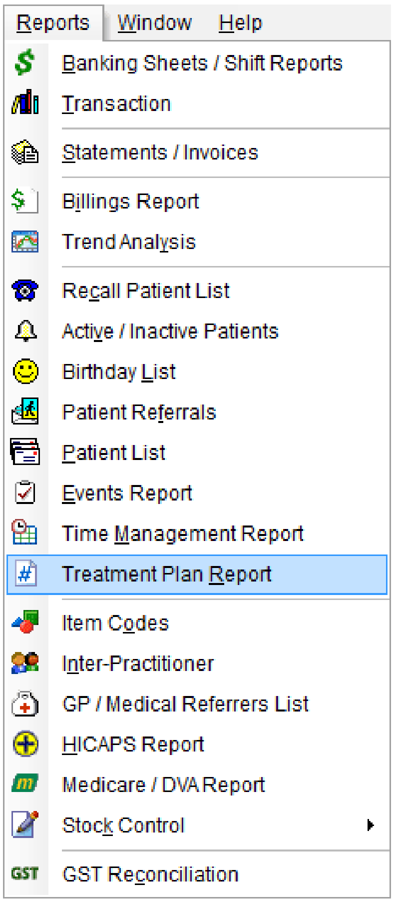
Returning to an active **Treatment Plan** later will allow you to see the number of **Current Treatments** since the start of the plan, along with the amount in the **Calendar Year**.

This information will also be displayed in the tooltip when hovering over a patient's appointment.

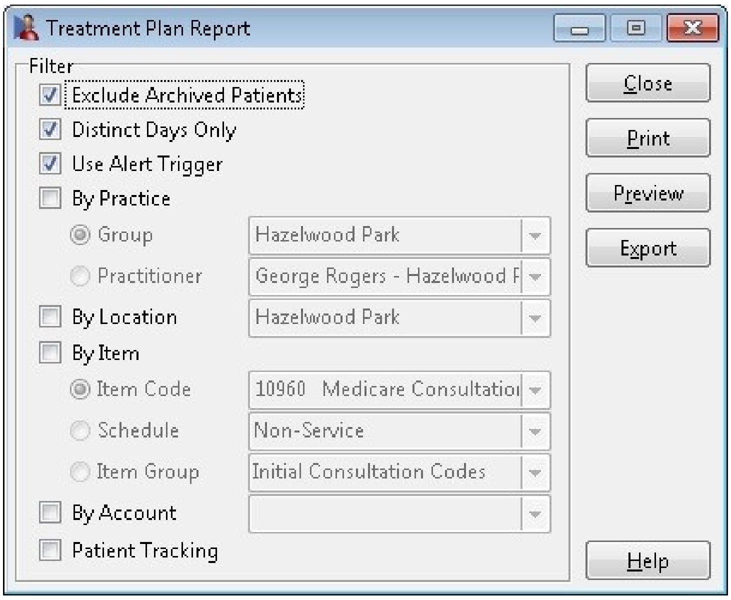


Treatment Plan Report

To generate a treatment plan report, go to the **Reports** menu and select the **Treatment Plan Report** option.



The following window will appear.



Treatment Plan Report

The following options can be selected:

- **Exclude Archived Patients** - lists those patients who have not been archived.
- **Distinct Days Only** - will record a maximum of one treatment per day, even if more than one transaction has been recorded for any one day.
- **Use Alert Trigger** - will only show patients with an active treatment plan who have reached their predefined *alert after* number of treatments.

Select **By Practice** and the relevant **Practice Group** or **Practitioner** if a particular practitioner or practice group is required.

Select **By Item** to list only those patients that have been billed under a particular **Item Code**, **Schedule** or **Item Group**.

Select **By Account** to filter the treatment plans by the patients separate accounts.

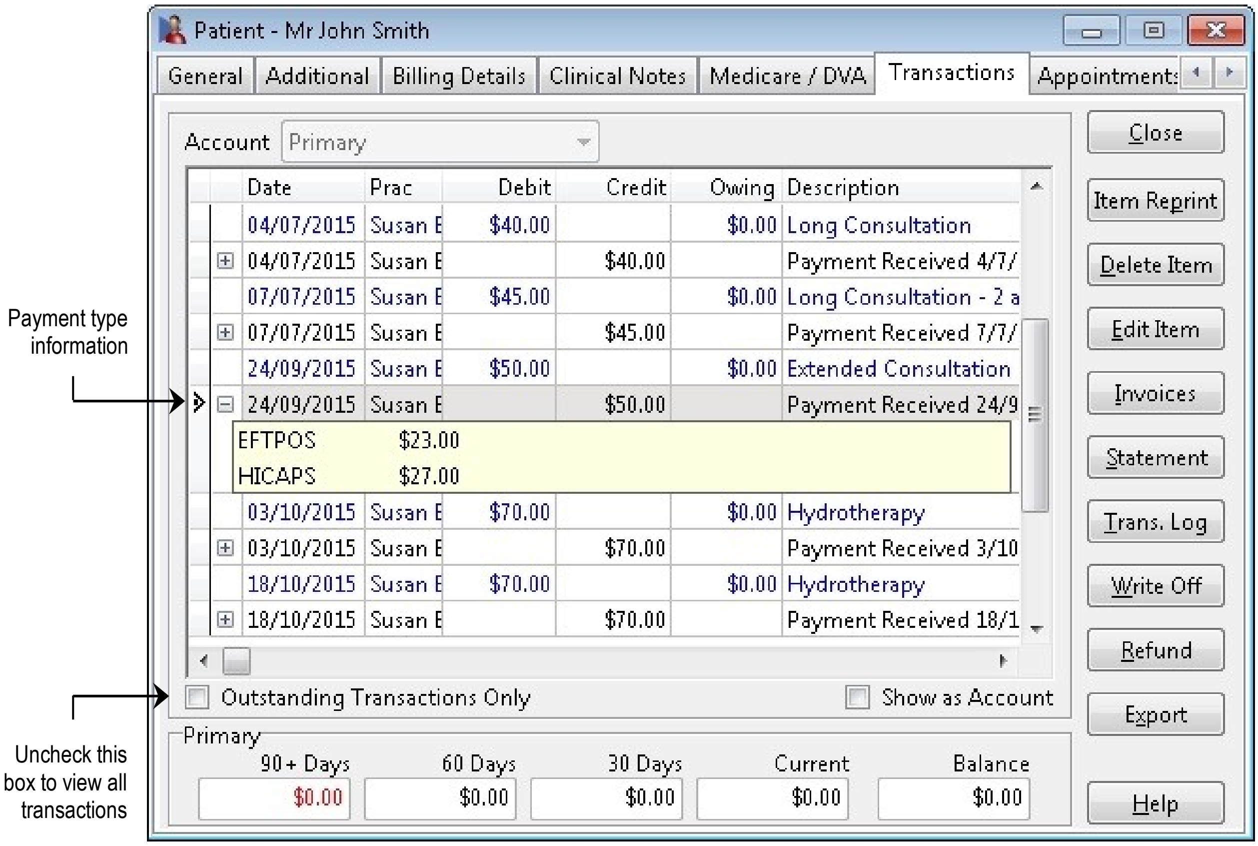
Select **Patient Tracking** to list only those patients that have a particular tracking category set in their patient file

.

- **Include if any** will generate a report of those patients who have *any* of the selected tracking categories set in their file.
- **Include if all** will generate a report of those patients who have all of the selected tracking categories set in their file.
- **Exclude** will generate a report *excluding* those patients who have the selected tracking categories set in their file.

Patient - Transactions

Select the **Transactions** tab from the patient file.



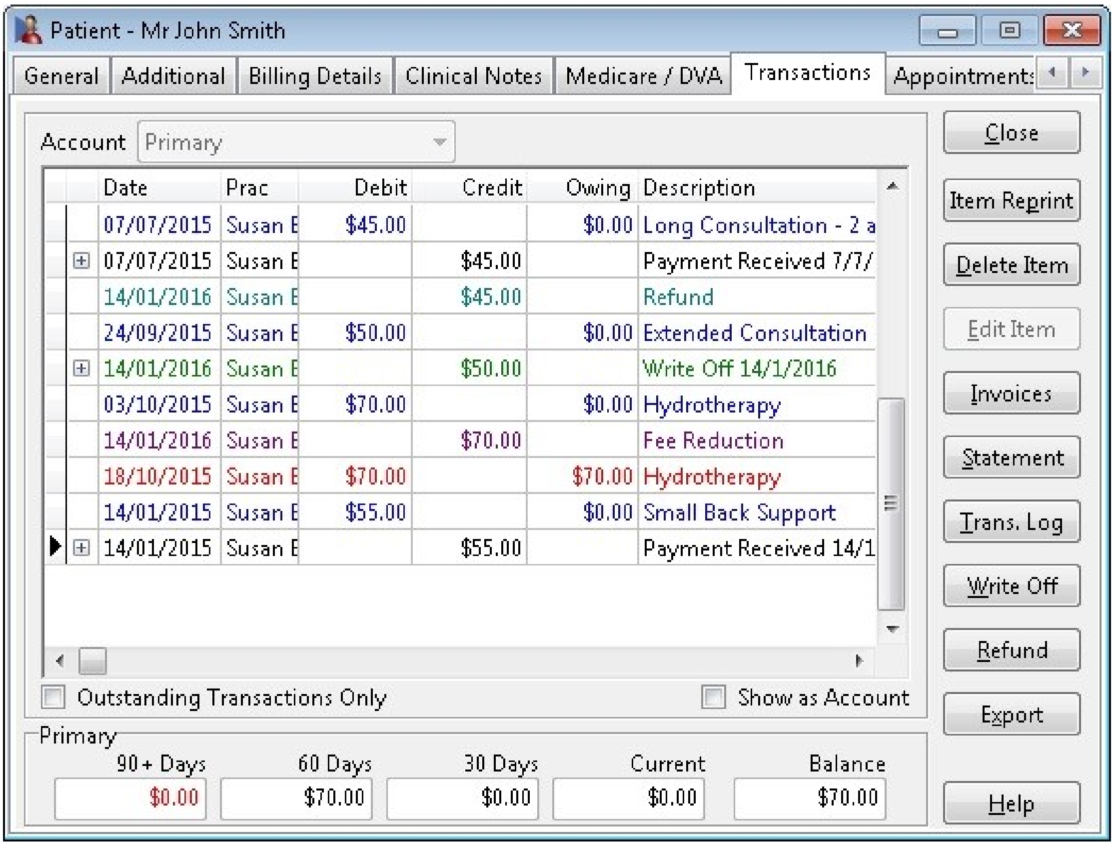
By default only the outstanding transactions will be seen in the transaction grid. To view all transactions uncheck the **Outstanding Transactions Only** option.

This view can be sorted by date range by clicking the **Date** column header or by name by clicking the **Name** column header (for linked patients only).

To view the method of payment, click the plus (**+**) located on the payment line, as displayed above.

Patient transactions can be exported to CSV or Microsoft Excel by clicking the **Export** button.

Patient - Transactions

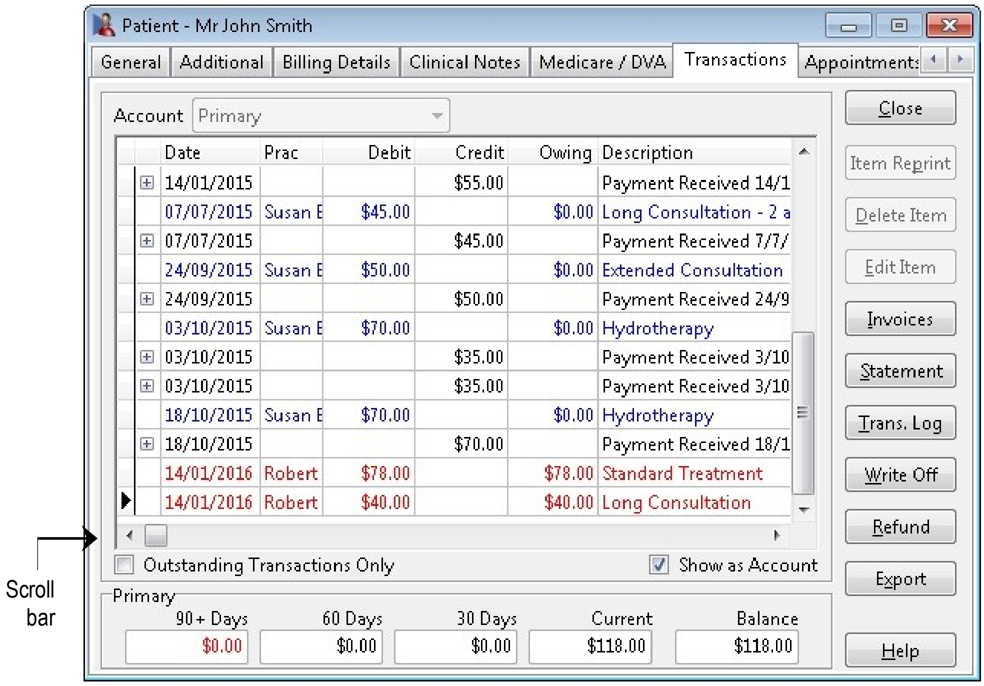


Transactions in *Front Desk 2017* are colour coded. Please refer to the table below for transaction types and associated colours.

Transaction Type	Colour
Unpaid Items	Red
Paid items	Blue
Payments	Black
Credit Payments	Brown
Reductions	Purple
Refunds	Aqua
Write Offs	Green

Patient - Transactions

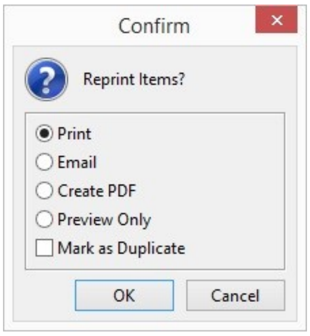
To view transactions in an account format select the **Show as Account** option.



Scroll across the bottom of the transaction screen to view more information on the transactions, such as **Item Code**, **Type of Transaction**, **Date Entered, Reference Number** and **GST** amount, if applicable.

Item Reprint

Receipts and accounts can be reprinted or emailed using the **Item Reprint** button. To select more than one item for reprinting, hold down the **<CTRL>** key on the keyboard and select the items required.



Select the **Mark as Duplicate** option if you wish to have the word **DUPLICATE** printed on the receipt or account.

Select the **Create PDF** option if you wish to print the receipt or account to an Adobe Acrobat file.

To preview the account or receipt on screen before printing select the **Preview Only** option.

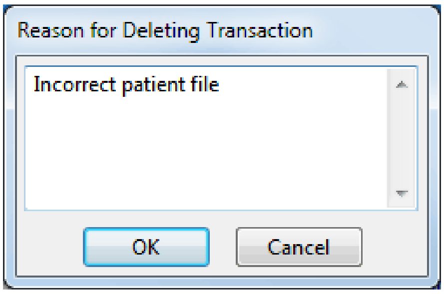
Patient - Transactions

Delete Item

To delete a transaction, select the transaction and click the **Delete Item** button.

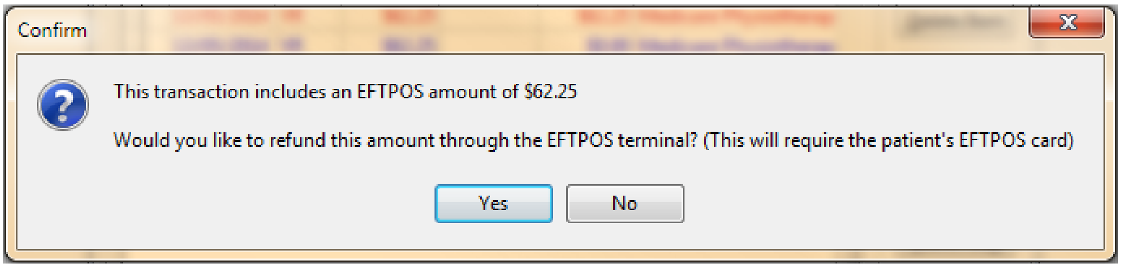
When you delete or edit a transaction from a patient file, you will be prompted to give a reason for doing so.

Type in your reason and click **OK**.

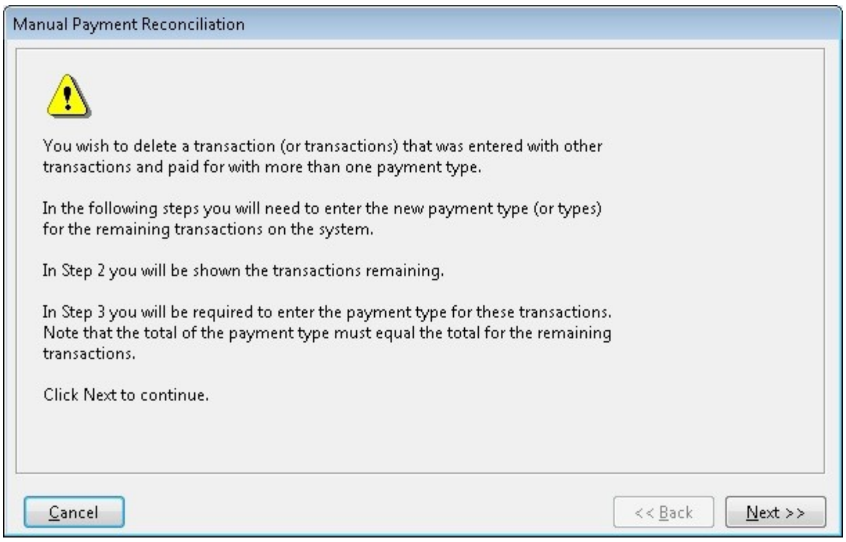


Please note that multiple deletions are not permitted, with only one item able to be deleted at a time.

If you have HICAPS or Tyro integration, when deleting an EFTPOS payment you will be asked if you would like to process a refund through the terminal.

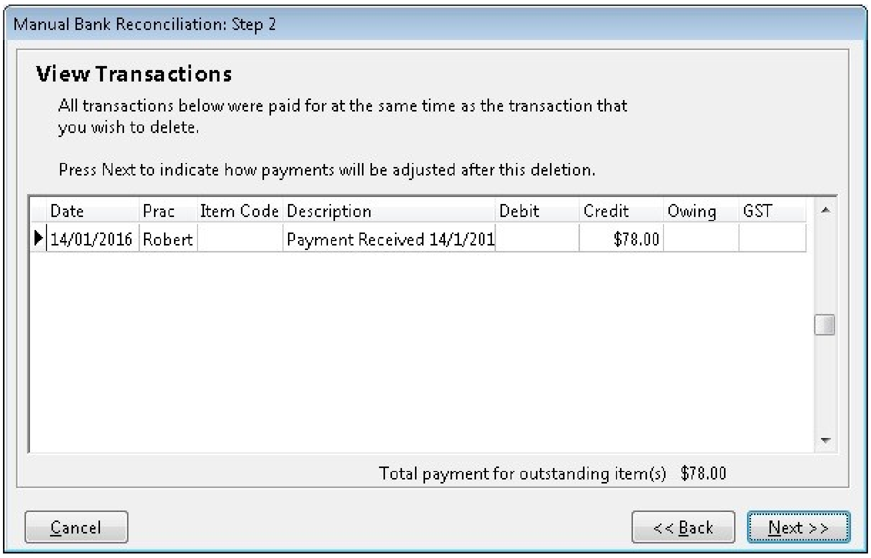


If you try to delete an item which was entered and paid for with other transactions and includes multiple payment types, the following **Manual Payment Reconciliation** dialog will appear.



Patient - Transactions

Click **Next** to continue with the reconciliation, **Back** to go to the previous screen or **Cancel** to cancel the operation. The following **Manual Bank Reconciliation: Step 2** dialog will be displayed.



This dialog details the additional transactions that were paid for at the same time as the item you wish to delete.

Click **Next** to continue with the reconciliation, **Back** to go to the previous screen or **Cancel** to cancel the operation.

The following **Manual Bank Reconciliation: Step 3** dialog will be displayed.

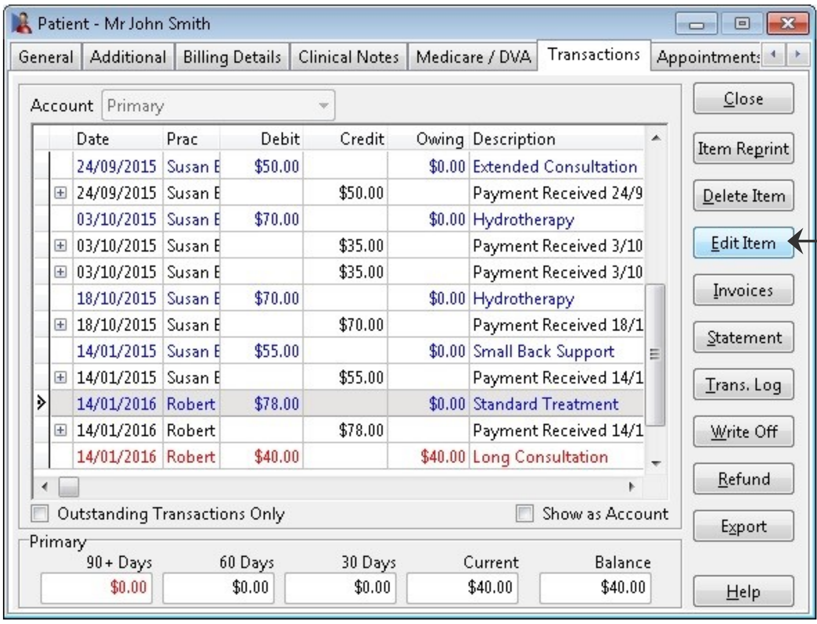
Edit the payment type fields so that the new total is equal to the **Total Payment** shown in the title bar of the **Manual Bank Reconciliation** window.

Click the **Process** button to continue.

Patient - Transactions

Edit Item

The edit item function is available to edit transactions and/or payments. Transactions can only be edited if you have appropriate user access rights.



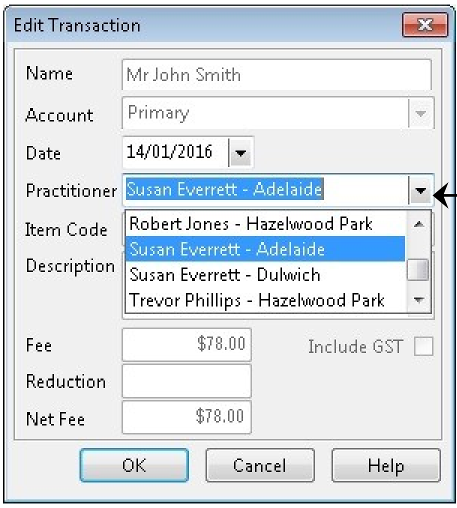
Edit Item

This function can be used instead of deleting and re-entering the transaction and/or payment.

For outstanding amounts (red) you may edit the **Date**, **Practitioner**, **Item Code** and **Fee**.

For items that have been paid (blue) only the **Date** and **Practitioner** fields can be edited. If patients are grouped together then the patient's name can be edited, but you will need to be in the main biller's file to change these details.

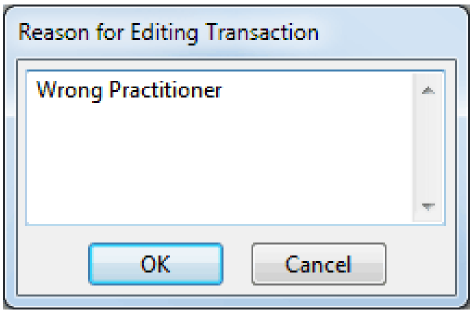
If the date of an invoice is changed then any transactions associated with it will also be updated accordingly by including reductions, payments etc.



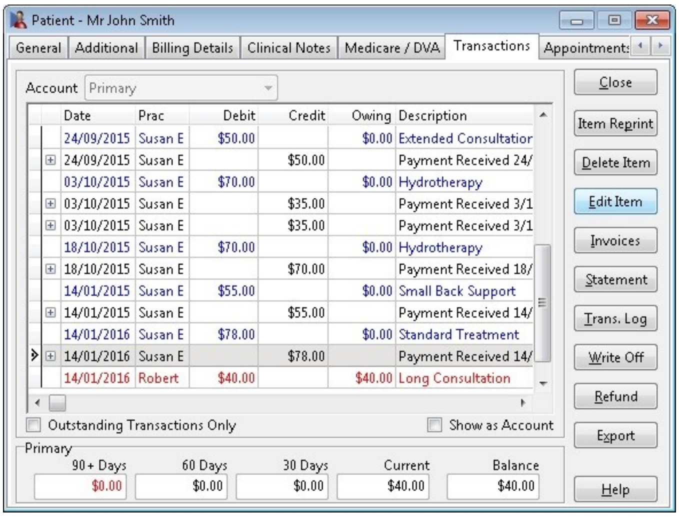
Select the group member from the drop-down box

Patient - Transactions

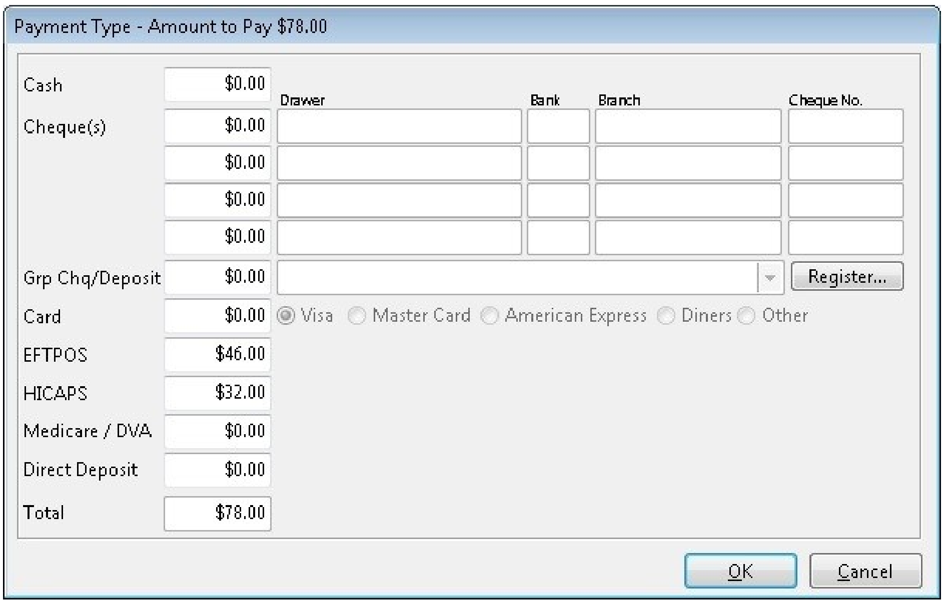
When editing a transaction, you will be prompted with the following dialog for a reason why the transaction has been edited, click **OK** when complete.



To edit a payment, highlight the payment line (black) and click the **Edit Item** button.



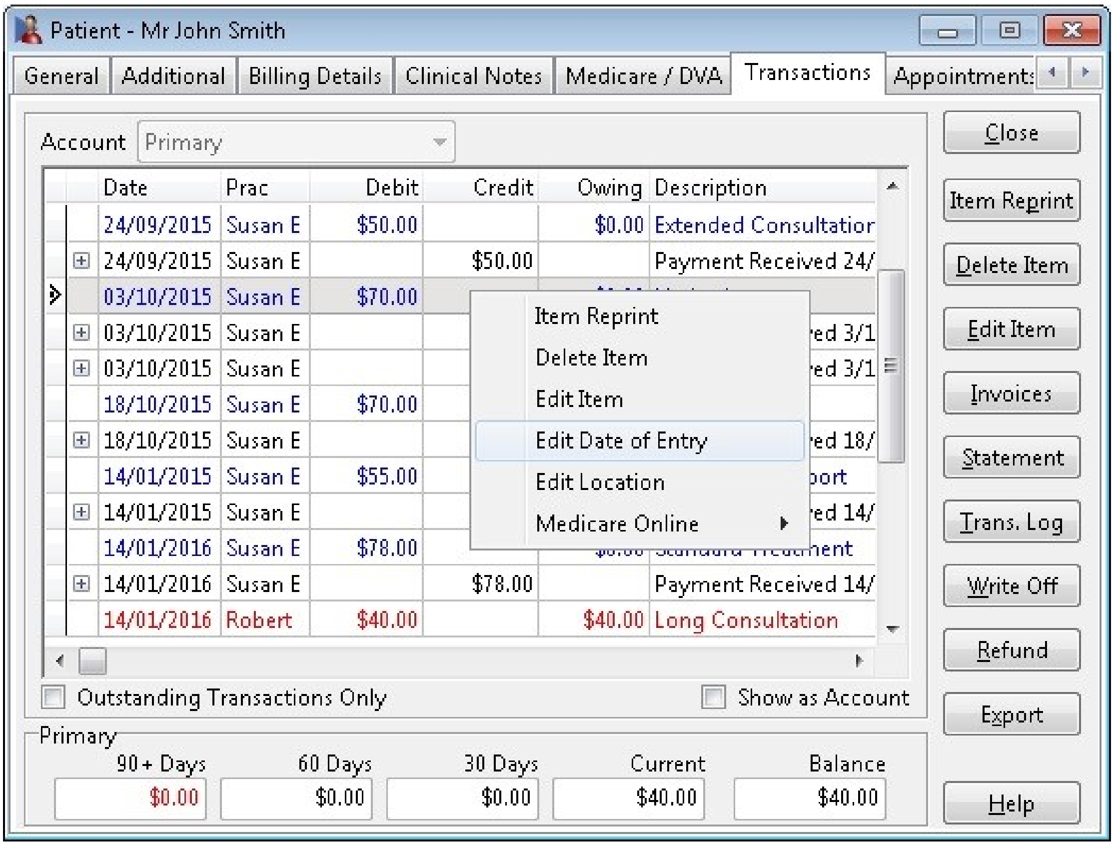
The **Payment Type** screen will appear. Change the method of payment to the correct payment type and click **OK**.



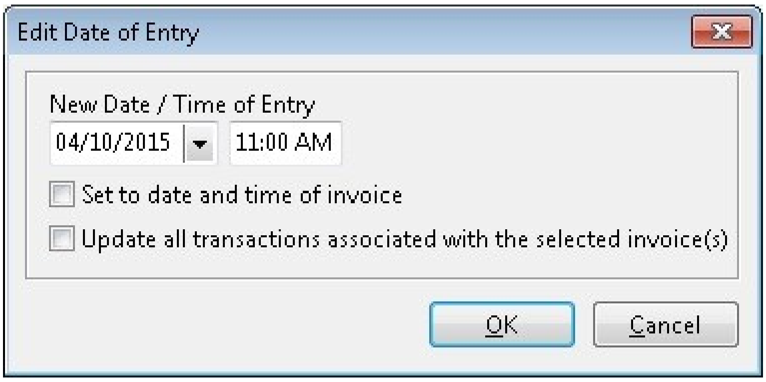
Patient - Transactions

Edit Date of Entry

To edit the date that a transaction was entered, right click on the transaction and select **Edit Date of Entry** from the menu.



Select the date and time you wish to change it to. If you wish to update the date on other associated transactions, select that option as shown below.



Front Desk 2017 - Note

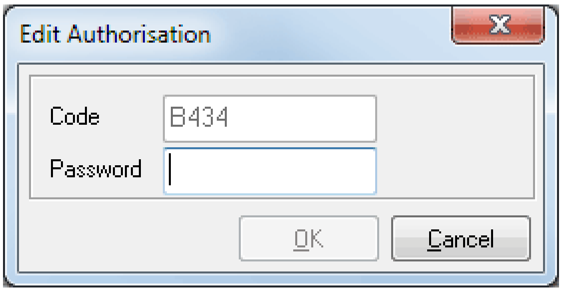
This option is only accessible if you have user access rights to **Edit Transaction Entry Date.**

Patient - Transactions

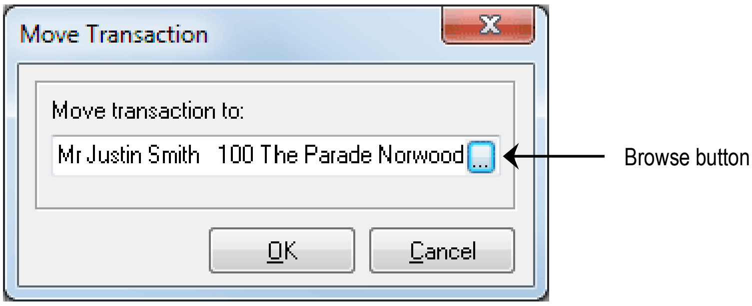
Moving Transactions

To move a transaction from one patient file to another, simply highlight the transaction and hold down **<CTRL> + M** on your keyboard.

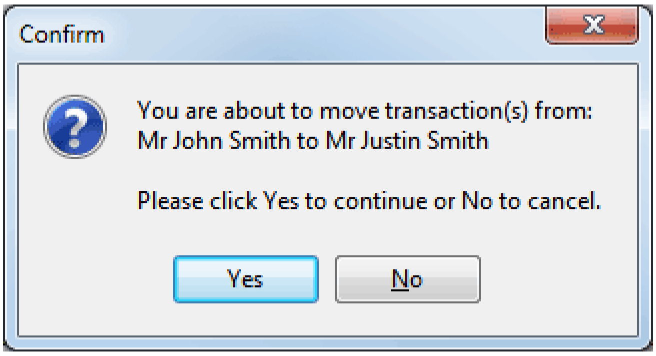
An **Edit Authorisation** screen will appear which requires a password. Please contact Smartsoft to obtain this password.



Once you have typed in the password, click **OK** and the **Move Transaction** screen will appear. Click the browse button ... and search for the patient file to which you wish to move the transaction.



Click **OK** and then **Yes** to complete the transaction move.



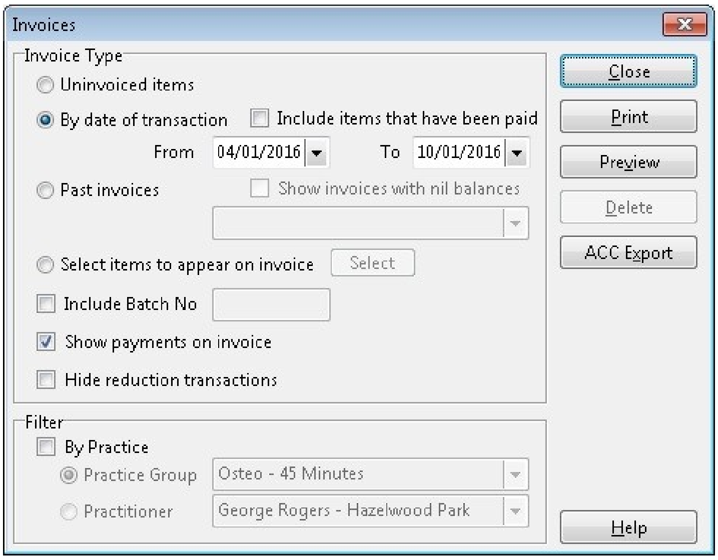
Patient - Transactions

Invoices

Invoices are generally used to bill third party payers such as WorkCover. They may also be used to provide patients with a summary of several receipts over a period of time.

Below are some options to choose from when printing invoices:

- **Uninvoiced items** - are transactions that have not been printed on an invoice.
- **By date of transaction** - will only print the transactions that fall between the two dates set, additionally you can include items that have been paid.
- **Include items that have been paid** - will include paid items on the invoice.
- **Past invoices** - allows you to view previously printed invoices that have not been fully paid.
- **Show invoices with nil balances** - allows you to print invoices that have been paid. This option also allows you to include payments on the invoice.
- **Select items to appear on invoice** - allows you to select the transactions that are required on the invoice.
- **Include Batch No** - allows you to record a particular invoice by batch number, this can be used at a later stage to preview or pay an invoice.
- **Show payments on invoice** - include payments on the invoice.
- **Hide reduction transactions** - won't print reductions on the invoice.
- **By Practice** - will include only the transactions that relate to a particular **Practitioner** or **Practice Group**.

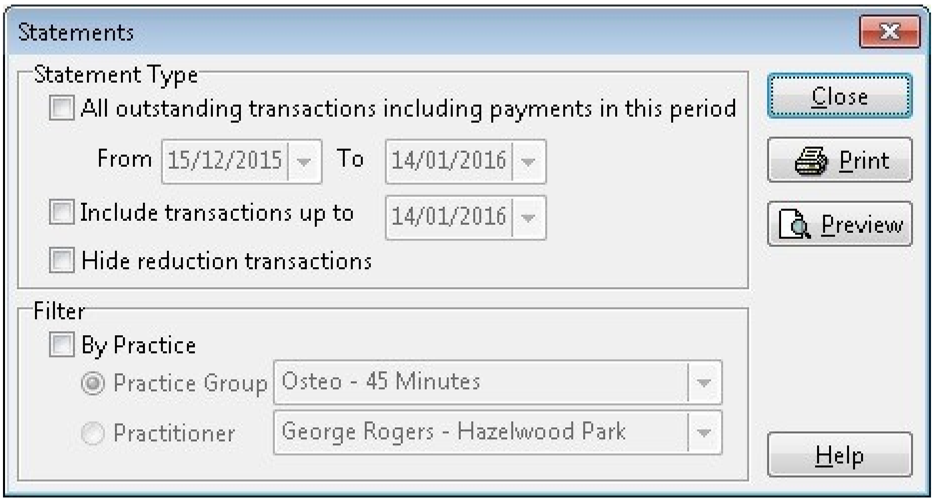


Patient - Transactions

Statements

Statements will print out **all** outstanding amounts regardless of the date of transaction.

- **All outstanding transactions including payments in this period** - will print all outstanding transactions as well as payments.
- **Include transactions up to** - will print all transactions up until a given date.
- **Hide reduction transactions** – to not print reductions on an invoice.
- **By Practice** - will include only the transactions that relate to a particular **practitioner** or **practice group**.

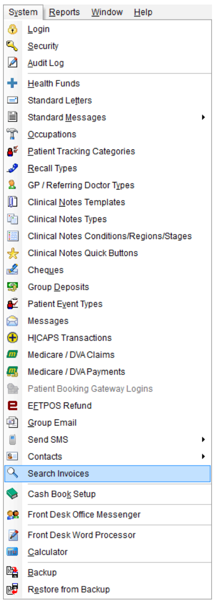


WORKING WITH PATIENTS

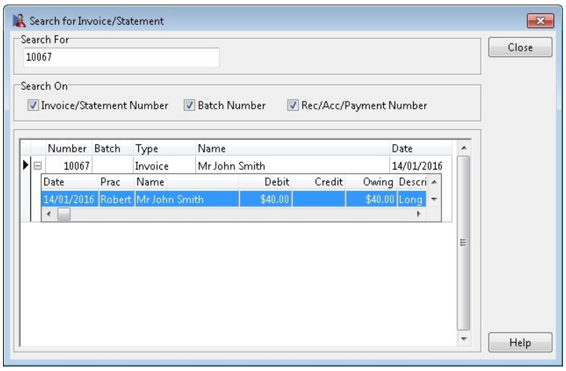
Search for Invoice/Statement Numbers

If the option to print Statement / Invoice numbers has been enabled in **System Information**, you will have the ability to search either for an invoice number, the batch number or a receipt/account/payment number.

To search for a statement or invoice number, go to the **System** menu and select the **Search Invoices** option.



The **Search for Invoice/Statement** screen will appear.



Enter the invoice/statement number to search for in the **Search For** field.

Select which option you wish to search on:

- **Invoice/Statement Number**
- **Batch Number**
- **Rec/Acc/Payment Number**

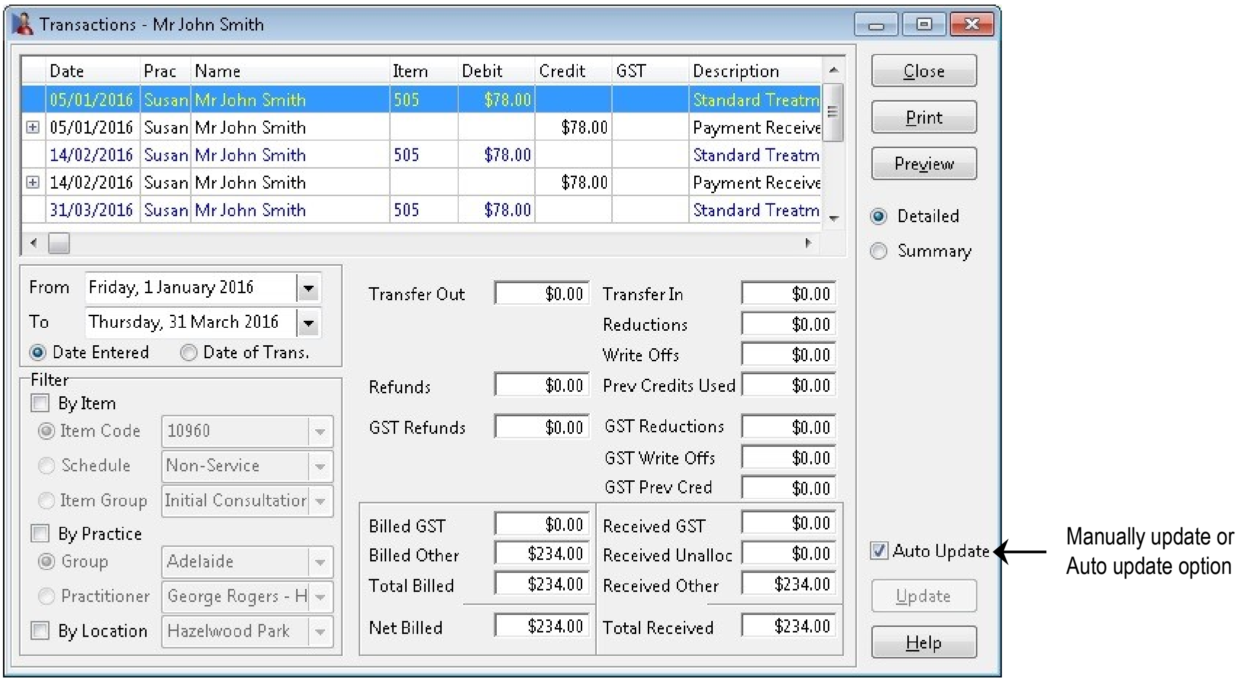
To view the transactions on a particular invoice, click on the plus (**+**) located on the left of the invoice/statement number.

If you wish to view the transaction associated with a patient's file, double click on the invoice item to open up the **Transactions** tab for that patient.

Patient - Transactions

Transaction Log

The **Transaction Log** in the patient file is used to produce a list of transactions between two dates for a patient.



Two dates are associated with each transaction, the date when the transaction was entered into the system (**Date Entered**) and when the service was provided (**Date of Trans.**).

Set the **From** and **To** dates to view the desired period. Select the **Date Entered** option to view transactions as they were entered into the system. Alternatively, select the **Date of Trans.** option to view transactions by the date of service.

Select the **By Item** option to view transactions that relate to a particular **Item Code**, **Schedule** or **Item Group**.

Select the **By Practice** option to view only the transactions that relate to a particular **Practitioner**, **Practice Group** or **Reporting Group**.

The report may be printed or previewed by clicking the **Print** or **Preview** buttons respectively.

The method of payment can be viewed by clicking the plus (**+**) to the left of the payment.

If the details of each transaction are to be printed select the **Detailed** option. Alternatively, if only summary totals are required select the **Summary** option.

This report automatically updates whenever the date or any of the filter options are altered. To manually update the information after you have selected the report criteria uncheck **Auto update** and click the **Update** button.

Patient - Transactions

Front Desk 2017 uses several different transaction types to record accounting details. A description of these transaction types follows.

Transfer In and **Transfer Out** (inter-practitioner transfers) are amounts credited to or debited from practitioners on a patient's account, for internal accounting reasons. These transaction types are used to help keep track of payments paid in advance to a practitioner, which appears as a credit on a patient file, which is later used to pay an amount for a different practitioner.

Write Offs are amounts credited to a billed item if you wish to clear an owing amount, generally due to difficulties in collecting this debit.

Reductions are amounts credited to a billed item to apply a discount to the normal full fee. The full fee and the reduction amount will be shown on printed receipts and accounts. Using reductions is the preferred method for charging reduced fees to concession type patients.

Prev. Credits Used (Previous Credits) are payments made using an existing credit (also referred to as unallocated payments) on a patient's account. No physical payment is received for a payment made with an unallocated amount, but the patient's credit amount will decrease appropriately by the use of a credit on the patient file.

GST Write Off is the GST component of an amount written off from a patient account.

GST Prev Cred. (Previous Credit) is the amount of GST paid by a patient using credit (unallocated payments).

Refunds are the total amount of refunds for that period including GST.

GST on Refunds calculates the total amount of GST on refunded items.

Received GST is the amount of GST received.

Billed GST is the amount of GST that has been billed.

Received Unallocated is the amount of unallocated payment received. These are credits on a patient account not allocated to pay any specific item or payments made in advance.

Received Other is the received amount for a period excluding GST and **Received Unallocated** amounts.

Billed Other is the billed amount for a period excluding GST billed amounts.

Total Billed is the total billed, including GST.

Net Billed is the total billed minus reductions, write-offs, GST reductions and GST write-offs.

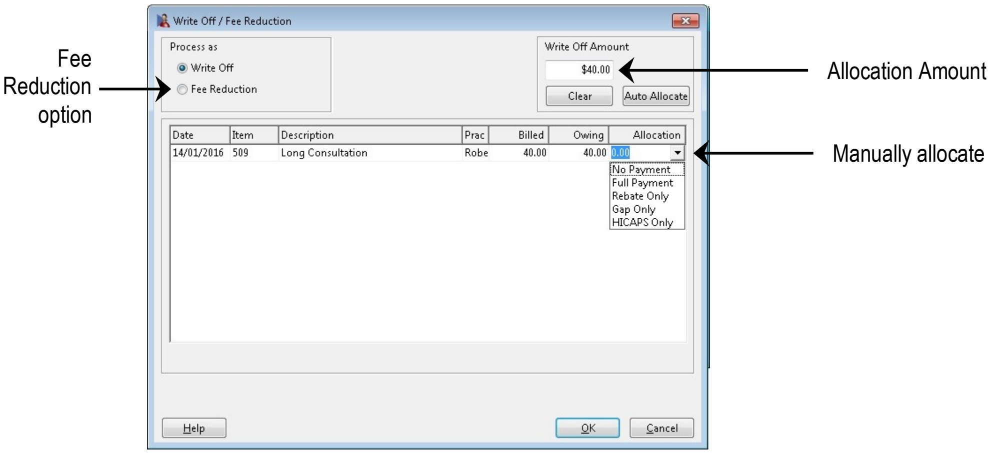
Total Received is the total physical amounts received, including GST and any payments made using patient credits (unallocated amounts).

Patient - Transactions

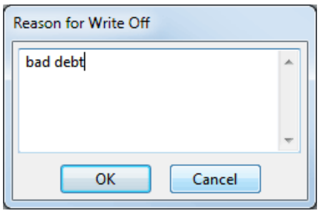
Write Offs

Write offs are amounts written off a billed item if you wish to clear an owing amount. A write off can be used if a debt is unrecoverable or if a correction is required on an account. To perform a write off, click the **Write Off** button. Enter the amount to write off in the **Write off Amount** field.

To allocate an amount to the oldest outstanding item(s) select the **Auto Allocate** button. The write off function can also be used to add reductions to items. For the amount to be recorded as a reduction, select the **Fee Reduction** option. Reductions can be viewed as a discount applied to a billed item.



You will be prompted by the following dialog to enter a reason for the write off or fee reduction, click **OK** when completed.



Front Desk 2017 - Note

Front Desk 2017 uses an open item accounting process. This is a method of transaction recording, which provides greater details on which individual items have and have not been paid, rather than just recording an outstanding balance amount. This is why *Front Desk 2017* enforces payments and credits to be made against specific items on an account.

To manually allocate a write off amount to a particular item, select the corresponding allocation cell and enter the amount or alternatively use the payment drop-down box to select an amount. The amount entered must be less than or equal to the amount owing for the item. The total of the amounts in the allocation column must equal the **Write off Amount**. Use the **Auto Allocate** button after manually entering an amount to automatically distribute any remaining amount to the oldest unpaid items. To clear the amounts in the allocation column, click the **Clear Allocated** button.

To process these transactions click the **OK** button, or click **Cancel** to cancel the operation.

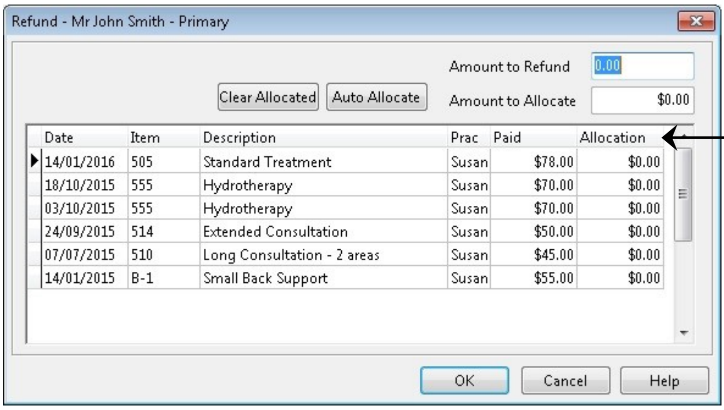
Patient - Transactions

Refunds

Front Desk 2017 enables you to refund a patient for any paid items or unused credits (unallocated payments). Simply click on the **Refund** button from the **Transactions** tab. You will be presented with a list of paid items and any unallocated payments that have been made by the patient.

Enter the **Amount to Refund** and allocate the amount to the appropriate transactions. If the item(s) to be refunded are the most recent, click the **Auto Allocate** button. This will distribute the amount amongst the listed items (note the amounts in the **Allocation** column), the most recent being refunded first.

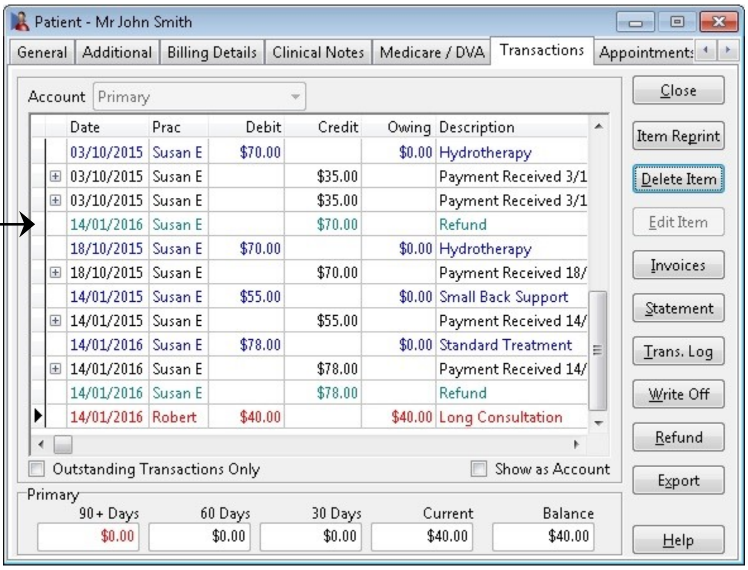
To distribute the amount manually, click in the **Allocation** column of the item to be refunded and manually enter the amount. To clear the amounts in the allocation column, click the **Clear Allocated** button.



Allocation column

Refunded items can be viewed in the transactions tab. The **Transaction Log** also shows refunded items.

Refunds will be recorded under the transaction tab

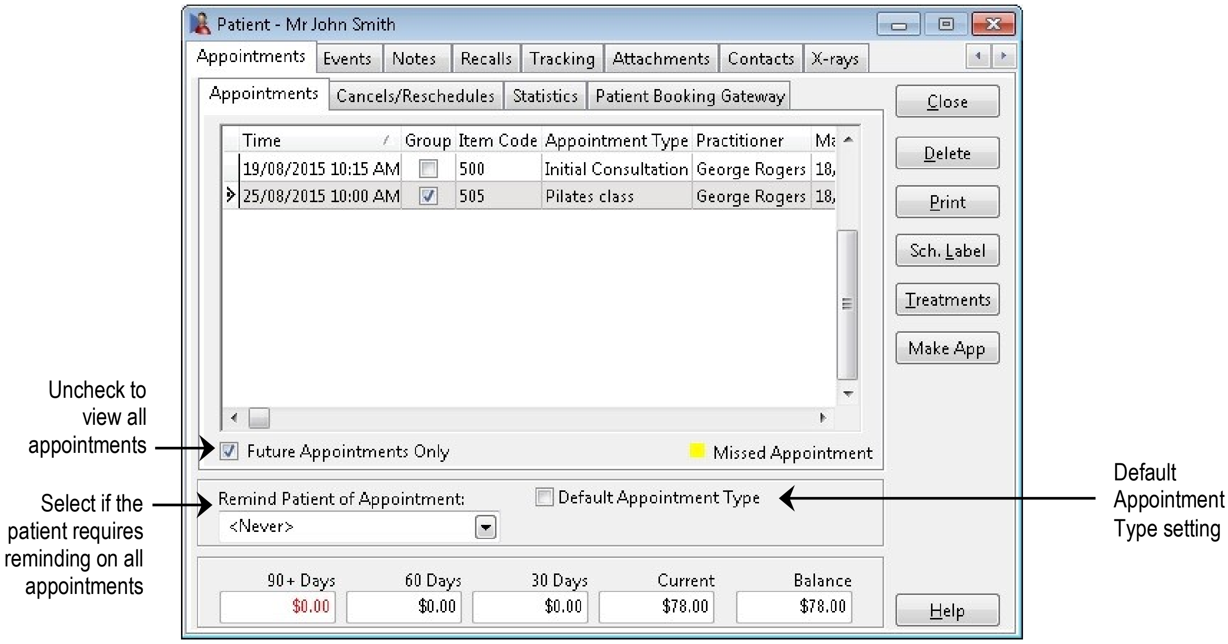


Export

The current view can be exported to CSV or Microsoft Excel using the **Export** button.

Patient - Appointments

Select the **Appointments** tab from the patient file.



By default only future appointments will be shown in the **Appointments** tab. To view past appointments, uncheck the **Future Appointments Only** option. Double-clicking an appointment will take you to that location on the Appointment Book.

Missed Appointments will be highlighted in yellow. Appointments will appear as missed if a transaction has not been entered for that day with the appointment practitioner, and if it is at least one hour after the missed appointment time.

To delete an appointment, highlight the desired appointment and click the **Delete** button, the user will be asked to enter a reason for deletion. To select multiple appointments for deletion, hold down the **<CTRL>** key on the keyboard whilst making your selection.

Patients can have a **Default Appointment Type**. Each appointment made for this patient will use the default appointment type unless otherwise specified. The default appointment type applies to new appointments only. If you have set up **Following Appointments** under the **Appointment Types** section in **System Information**, then any appointments made by the **Make Next Appointment** method will default to your **Following Appointments** settings.

Patient appointment reminders can be set as a default with the **Remind Patient of Appointment** option. Select from the drop-down box one or more of the three options - **Reminder** is a telephone call, **SMS Reminder** is a text message sent to their mobile and an **Email Reminder** is a message sent to their email address. A reminder tag will appear on all future appointments. This can also be set as a default when creating new patient files in **System Information - Defaults**.

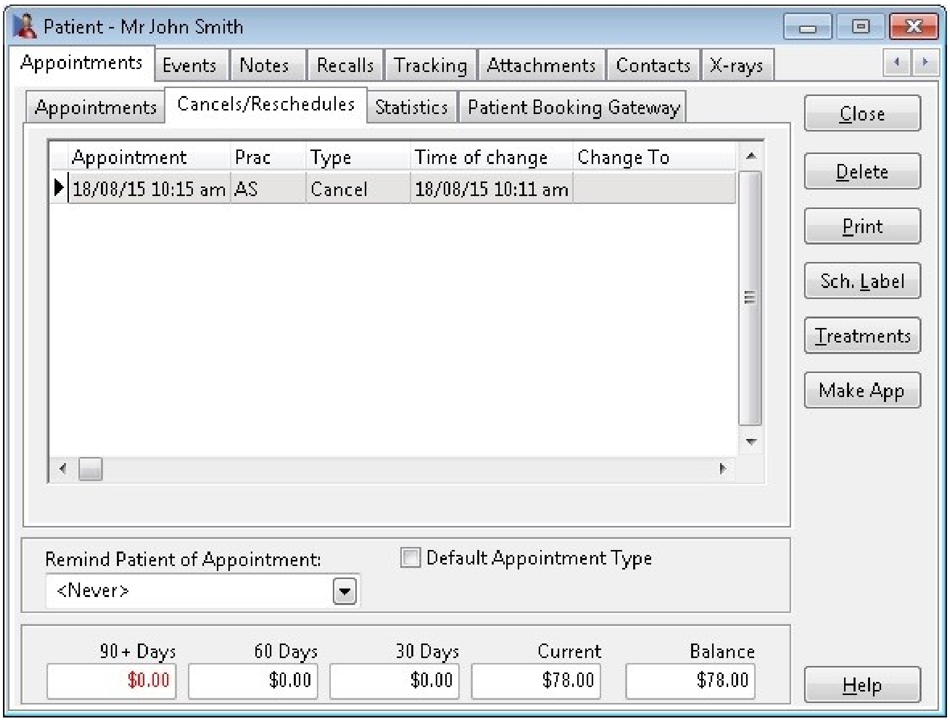
Front Desk 2017 - Tip

SMS and Email Reminders will only be available if you have enabled the **SMS** and **Email Integration** functionality on the **Advanced** tab in **System Information**.

Patient - Appointments

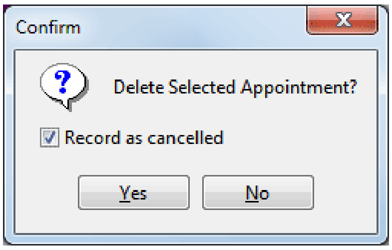
Cancels/Reschedules

Appointments that have been cancelled or rescheduled will appear in the **Cancels/Reschedules** tab.



An appointment will only be recorded as rescheduled if the appointment has been changed to another day, not just to another time on the same day, and only if using the **Change Appointment** option to move the appointment.

An appointment is recorded as cancelled if you delete an appointment and select the **Record as Cancelled** option.



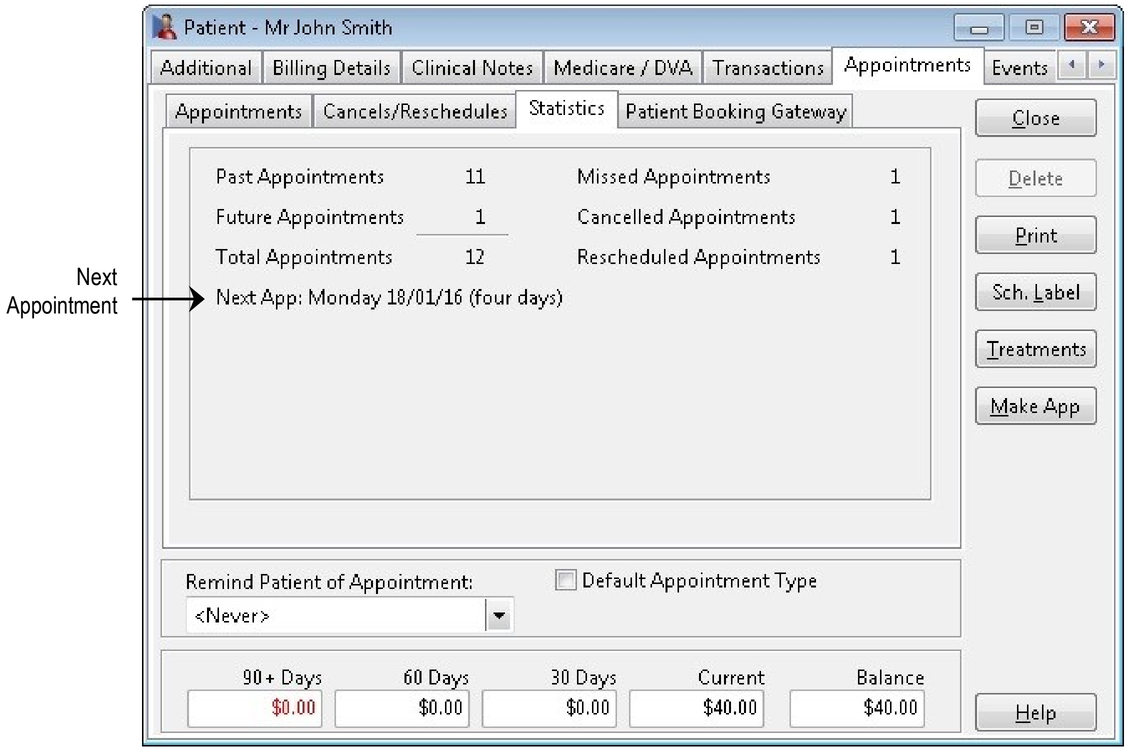
To delete a cancellation or reschedule record, click **Delete**.

The **User** who changed the appointment is recorded in the **Cancels/Reschedules** tab of the patient file.

Patient - Appointments

Statistics

To view statistics on a particular patient's appointments click on the **Statistics** tab.

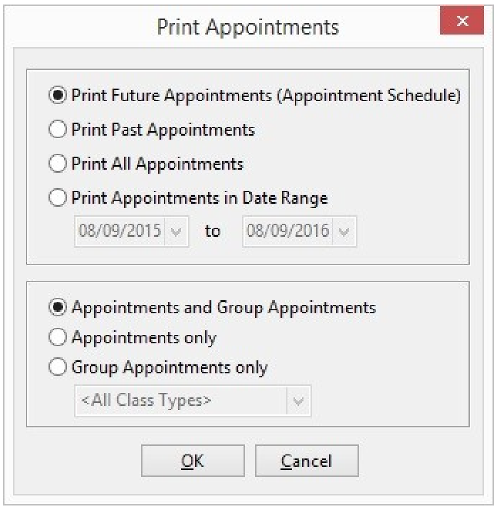


This section of the patient file displays the number of past and future appointments as well as total missed, cancelled and rescheduled. The patient’s next appointment will also be included on the statistics tab. If the patient has no next appointment then their last appointment date will be displayed.

Patient - Appointments

Print

The **Print** function provides several options when printing patient appointments.



Print Future Appointments (Appointment Schedule) will print the patient's future appointments.

Print Past Appointments will print the patient's appointment history.

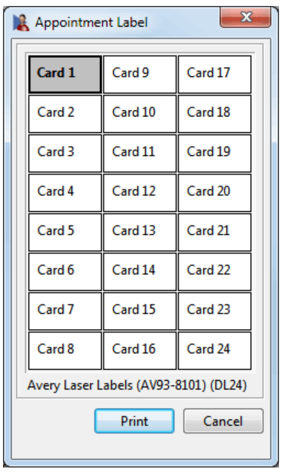
Print All Appointments will print all the patient's appointments.

Print Appointments in Date Range will print patient appointments from a specific date range.

These options can be filtered to print **Appointments and Group Appointments**, **Appointments only** or **Group Appointments only**.

To change the print layout of appointments go to **System Information** and select the **Printing Options** tab, followed by the **App Sched** tab.

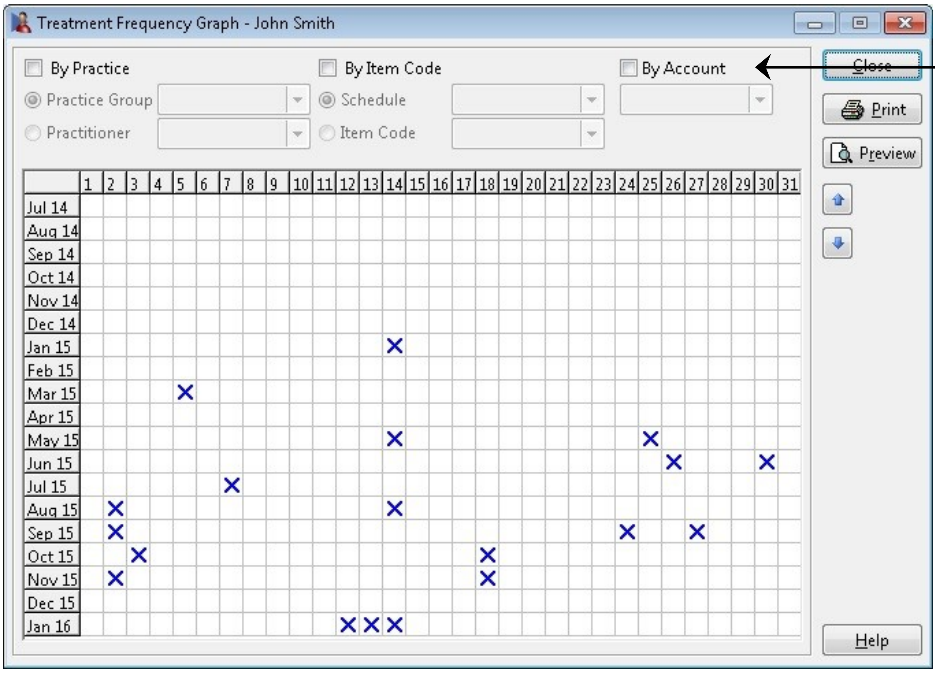
The **Sch. Label** button prints the next 5 appointments onto a business card sized label. Select the label you wish to print on and click the **OK** button. The required labels for this print out are Avery Laser Labels [AV93-8101] [DL24]. To adjust the alignment of labels go to **System Information** and select the **Printing Layout** tab.



Patients - Appointments

Treatment Frequency Graph

Select the **Treatments** button from the **Appointments** tab to display when the patient has attended for treatment. Note that this graph is based on a patient's billed transactions, not appointments.



This is only shown if Multiple Accounts is activated

The treatment frequency graph may be used to help a practitioner assess previous and possible future treatment plans. Patients requesting a copy of their treatment dates to claim travel allowances can be given a treatment frequency graph instead of a detailed transaction print out. This will provide appointment dates without the amounts being charged for each treatment.

To generate a graph relating to a particular practitioner or practice group, select **By Practice** and the relevant **Practitioner** or **Practice Group**.

To generate a graph relating to a particular schedule or item code, select **By Item Code** and the relevant **Schedule** or **Item Code**.

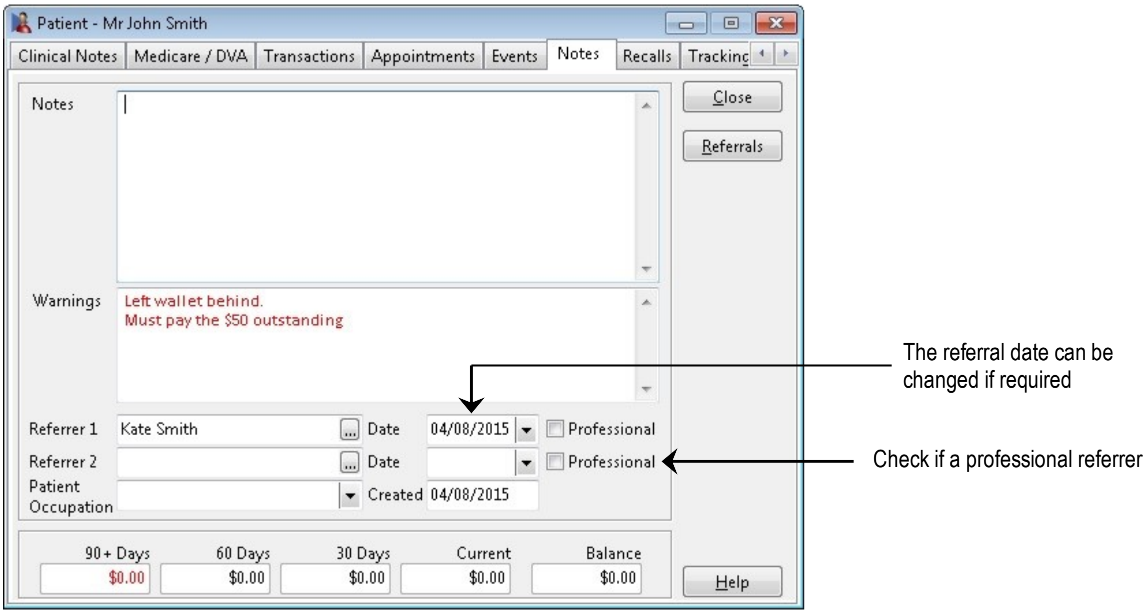
To generate a graph relating to a particular account, select **By Account** and the relevant account. **Please note that the By Account option is only available if Multiple Accounts is enabled in System Information.**

Make Appointment

You can make appointments for the patient directly from the patient file using the **Make App** button. This option allows you to make a single appointment or schedule multiple appointments. Refer to the section on the Appointment Scheduler for instructions on how to use this feature.

Patient - Notes

Select the **Notes** tab from the patient file.



The **Notes** window is a scrollable area that can contain notes regarding the patient. Generally, this area would be useful for administration notes for the patient.

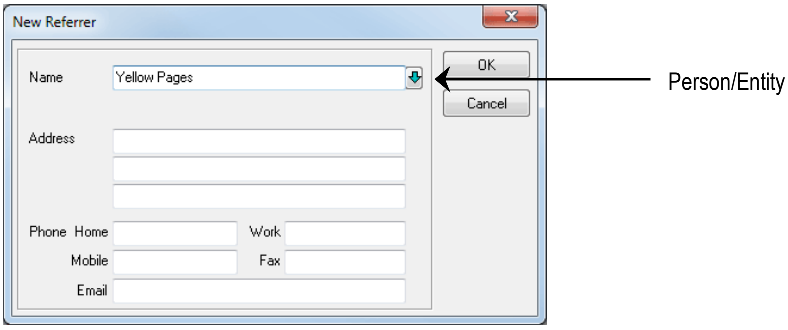
Warnings

Patient warnings or reminders can pop up when accessing the patient file and/or when making an appointment. To alter the warning preferences, select **Options** from **System Information**.

Referrers

Referrer 1 and **Referrer 2** are used to record patient referrals. To enter a referrer, click the browse button and search for the referrer from the **Search on Patient** screen. Tick the **Professional** box if the referrer is professional, i.e. GP or another health professional.

If the referrer is not a member of the patient list click the **New** button and enter the details in the **New Referrer** dialog. To enter the referrer as an entity such as Yellow Pages or perhaps the local newspaper, use the **Person/Entity** button to change the name format as required.



WORKING WITH PATIENTS

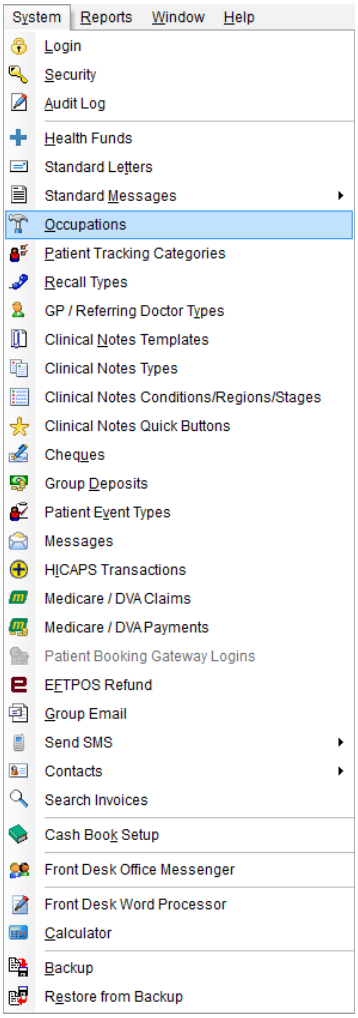
Patients - Notes

Occupations

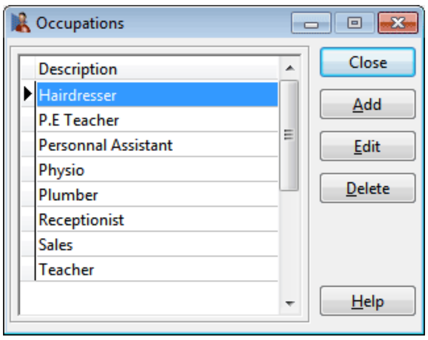
To enter a **Patient Occupation** either type directly into the field, select one from the drop-down box or right click on the field and select **Add Occupation**.

Creating Patient Occupations

To set-up standard occupations within *Front Desk 2017* select **Occupations** from the **System** menu as shown below.

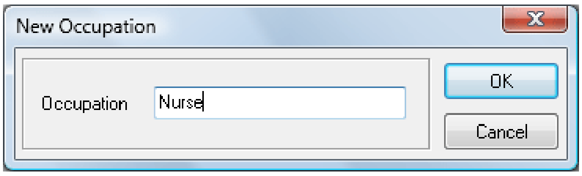


To create an occupation, click the **Add** button.

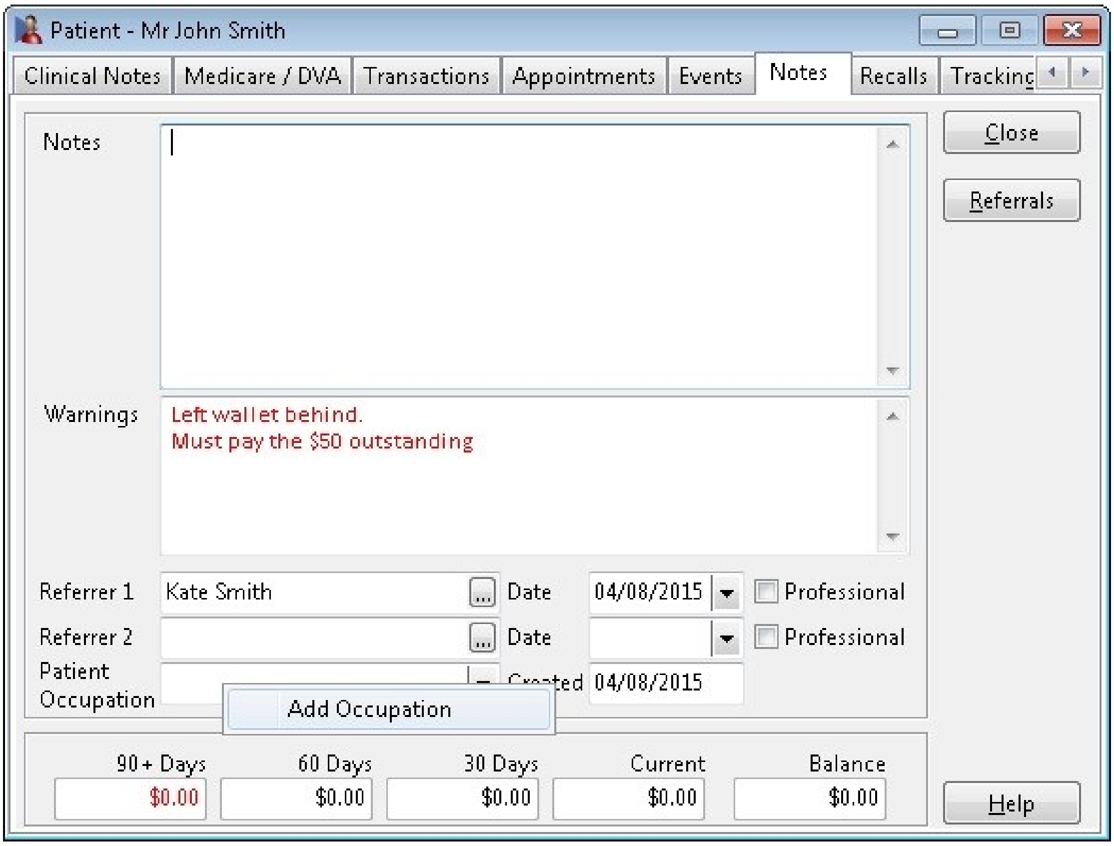


Patients - Notes

Enter the description into the **Occupation** field and click **OK**. To edit or delete an occupation highlight the occupation and click the **Edit** or **Delete** buttons.



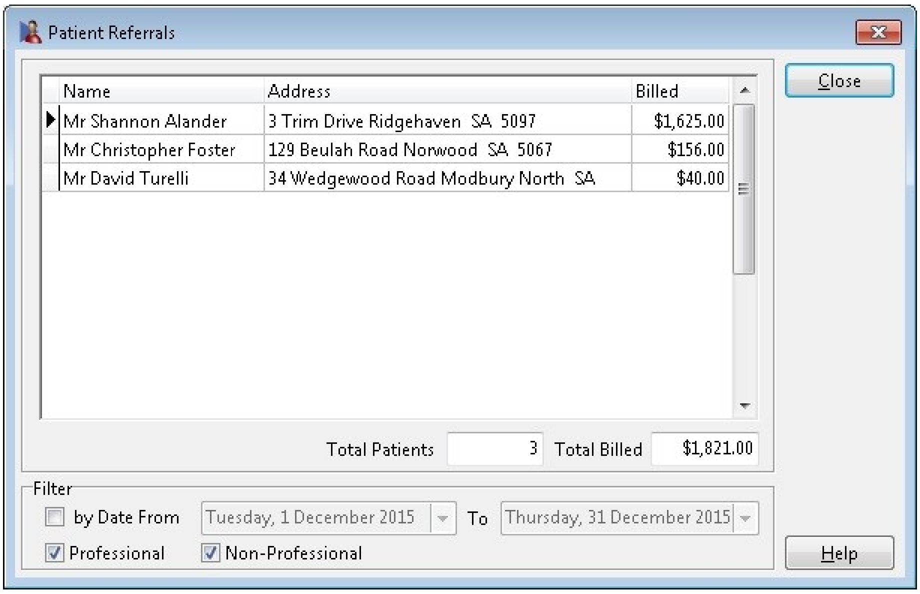
Patient Occupations can also be created by right-clicking on the **Patient Occupation** field and selecting **Add Occupation**.



Patient - Notes

Patient Referrals

To list all patients who have been referred to the practice by this particular patient, click the **Referrals** button under the **Notes** tab. The following **Patient Referrals** dialog will be displayed.



The number of patients referred is displayed in the **Total Patients** field and the total amount billed to these patients is displayed in the **Total Billed** column.

To display the patients who have been referred to the practice within a specified period of time, select **by Date** and enter **From** and **To** dates.

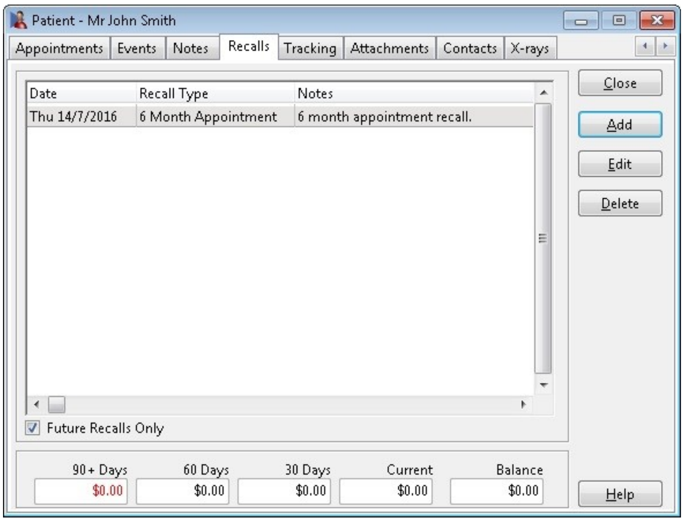
To view both **Professional** and **Non-Professional** referrers keep both options selected, otherwise uncheck the one you don't wish to search on.

Front Desk 2017 - Tip

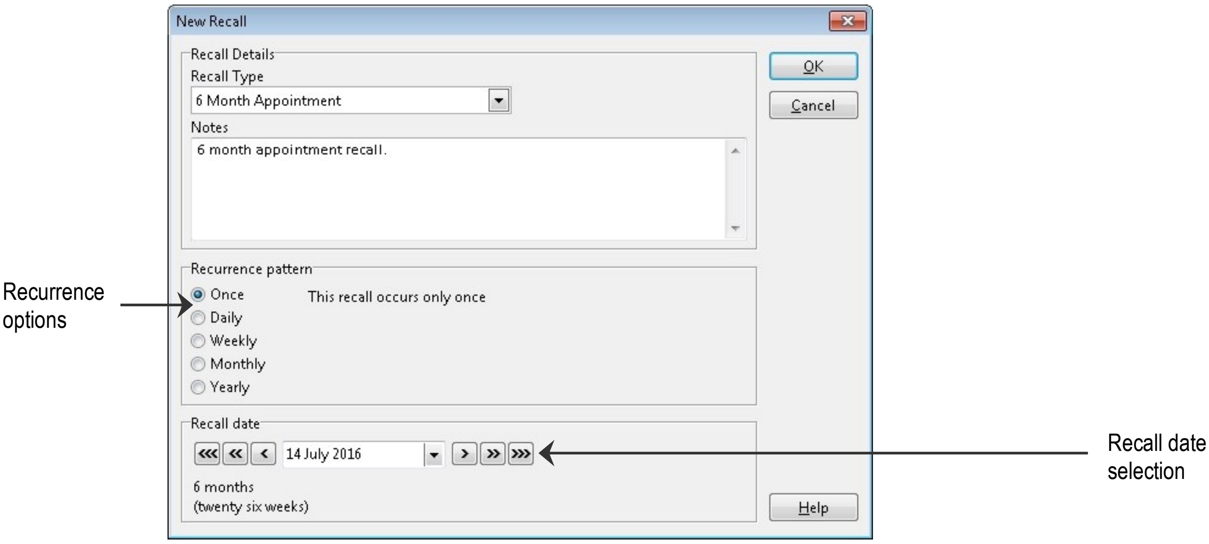
If the *Medical Specialist Referrals* functionality is required in your practice refer to the **Advanced Features** section at the end of this manual. This option should only be used by medical specialists with allied health professionals using the default medical referral functionality in *Front Desk 2017*.

Patient - Recalls

Select the **Recalls** tab from the patient file.

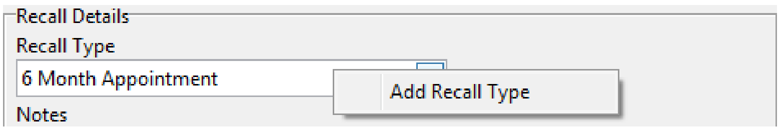


Click **Add** to create a new recall, and select a **Recall Type** from the drop-down menu.



Any notes relating to the Recall can be added in the **Notes** field.

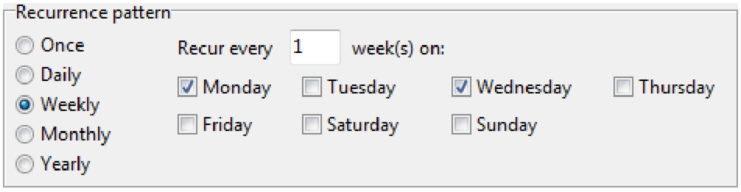
To create a new recall type, right click on the **Recall Type** field and select **Add Recall Type**.



Set a **Recurrence pattern** by selecting which time interval to repeat the recall upon; **Once**, **Daily**, **Weekly**, **Monthly** or **Yearly**.

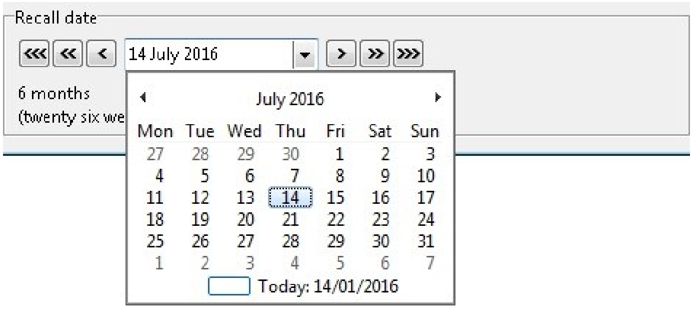
Patient - Recalls

Depending on the repetition interval selected, different options will become available to customise the recurrence.

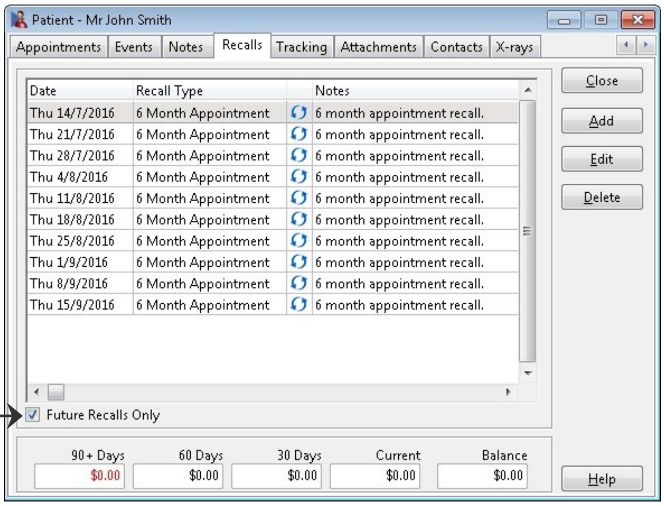


When repeating a recall more than once the **Range of Recurrence** allows the user to specify the initial recall date, and the total number of recurrences.

When a recall is set to occur only once, a single recall date will be available to select using the arrows provided. Alternatively selecting the date drop-down option will allow you to select a particular calendar date.



Click **OK** to complete the recall.



Future Recalls Only option.

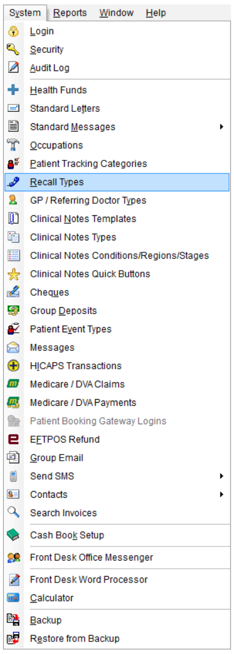
To view past recalls, deselect the **Future Recalls Only** option.

To edit or delete an existing recall, select the recall and click **Edit** or **Delete**.

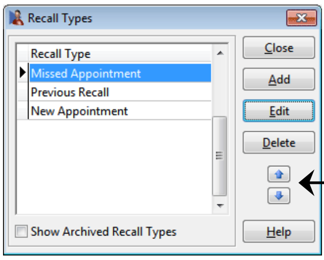
Patient - Recalls

Creating Recall Types

To set up standard recall types select **Recall Types** from the **System** menu as shown below.

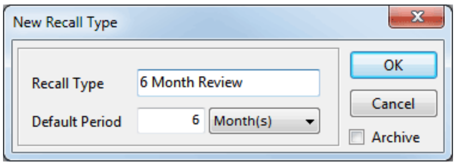


To create a recall type, click **Add**.



Used to change the order Recall Types are listed.

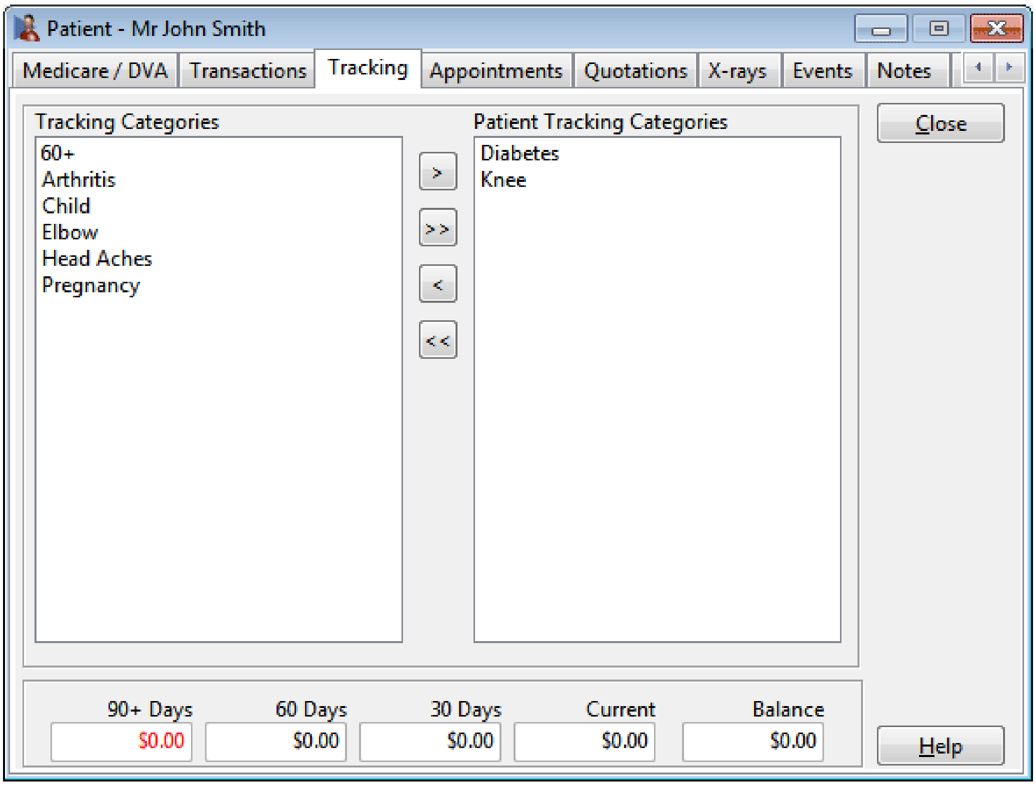
Enter the **Recall Type** and **Default Period** and click **OK**. To edit or delete a recall type, select the recall type and click **Edit** or **Delete**.



To adjust the order in which recall types appear, use the up and down arrows.

Patient - Tracking Categories

Select the **Tracking** tab from the patient file.



Tracking categories are used as **Filters** when generating patient lists for reports or mail outs. These items are generally clinical, administrative or marketing in nature.

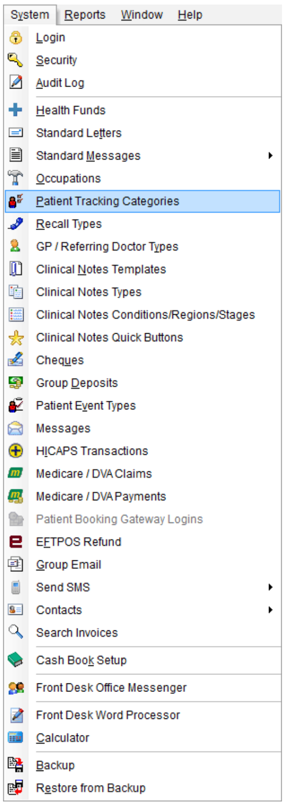
To define a patient's tracking items, the categories are moved from the left window to the right window. To move categories from window to window, the arrow (<,<<,>,>>) buttons may be used or the drag-and-drop technique may also be used.

Click the **>>** button to move ***all*** categories from the left to the right.
Click the **<<** button to move ***all*** categories from the right to the left.
Click the **>** button to move ***selected*** categories from the left to the right.
Click the **<** button to move ***selected*** categories from the right to the left.

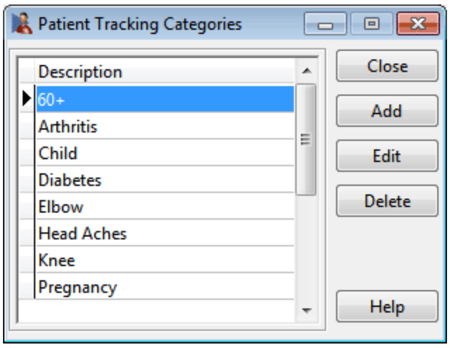
To select multiple tracking categories hold down the **<CTRL>** key on the keyboard whilst making your selection.

Creating Patient Tracking Categories

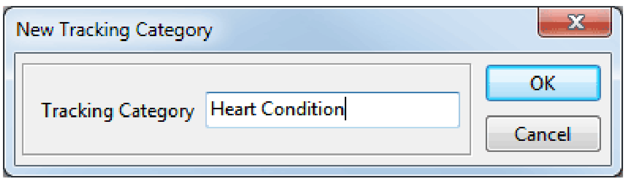
To set up standard tracking categories select **Patient Tracking Categories** from the **System** menu as shown below.



To create a tracking category click the **Add** button.

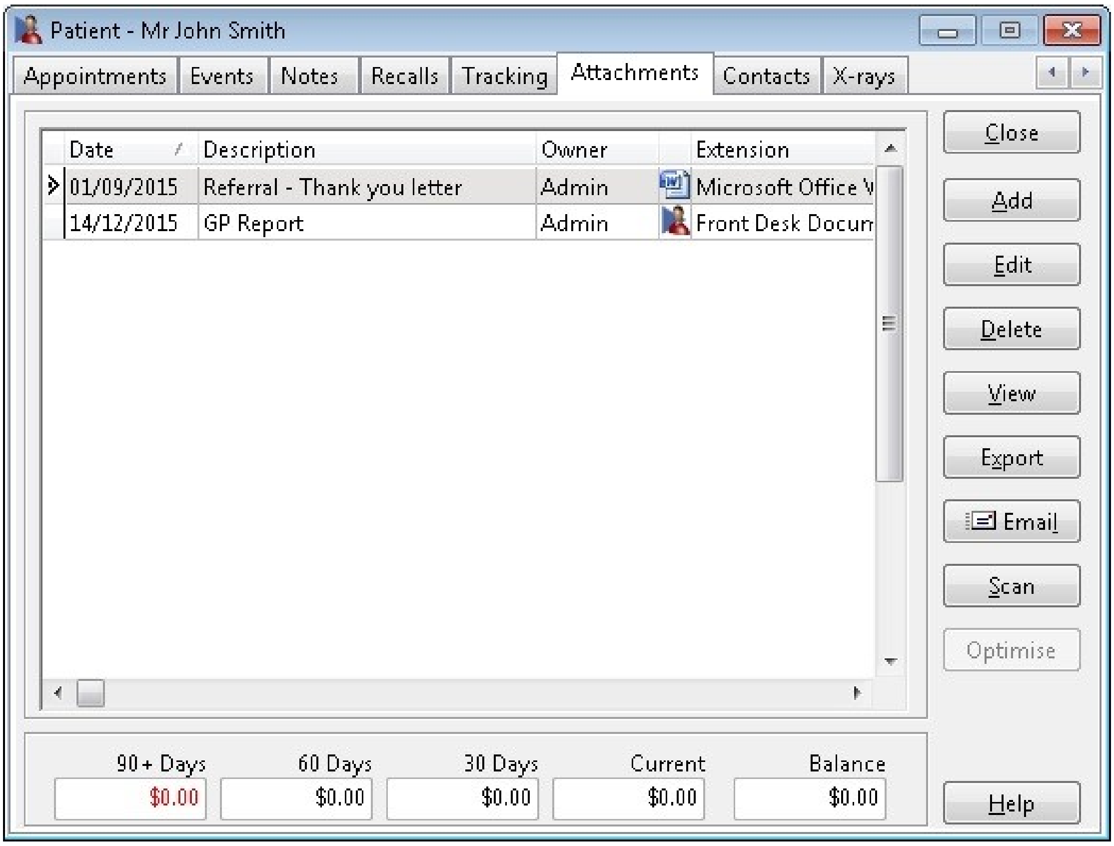


Enter the description into the Tracking Category field and click **OK**. To edit or delete a tracking category select that particular category and click the **Edit** or **Delete** buttons.



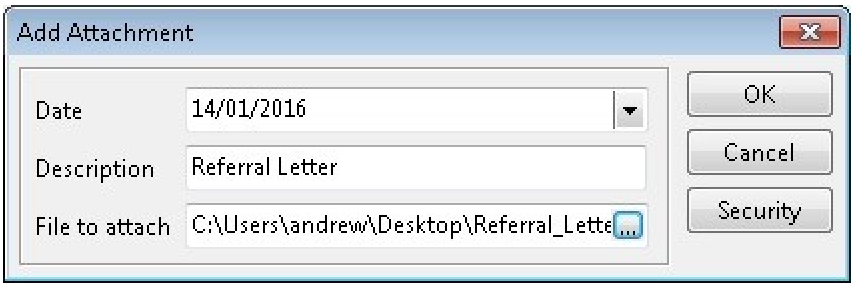
Patient - Attachments

Select the **Attachments** tab from the patient file.



The attachments allows you to add files to the patient file. These files can include letters, scanned documents, pictures, sound files or videos.

To attach a file or document to a patient file click the **Add** button. The following **Add Attachment** dialog will appear.



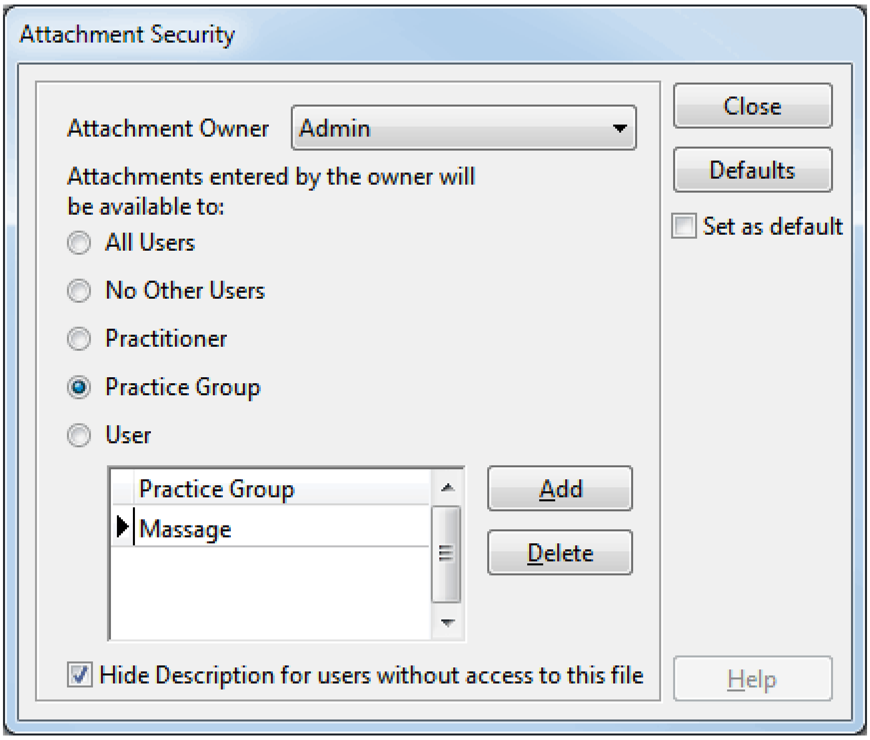
Enter a **Description** that reflects the nature of the attachment. Search for the **File to attach** by clicking the browse button ..., then click **OK**. Multiple files can be selected for attachment by holding down the **<SHIFT>** key while selecting the files.

The drag-and-drop technique may also be used to insert an attachment, drag the file from its location into the attachments grid.

Patient - Attachments

To restrict access to an attachment click the **Security** button. This allows users to grant access to **All Users**, **No Other Users**, specific **Practitioners**, specific **Practice Groups** or specific **Users**.

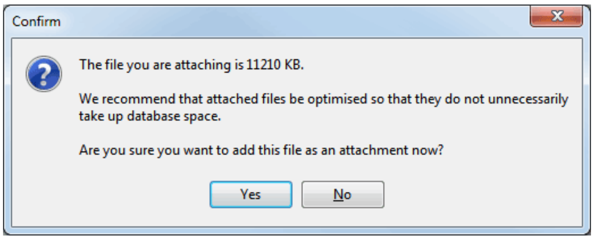
Users can select the **Attachment Owner**, **Default** settings and to **Hide Description for users without access to this file**.



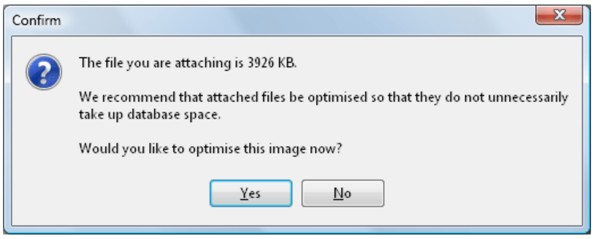
Patient - Attachments

The attached file should be as small as possible; to assist with this *Front Desk 2017* will display a message letting you know if the file size is too large. You can turn this warning on and off or set the maximum size in **System Information - Attachments**.

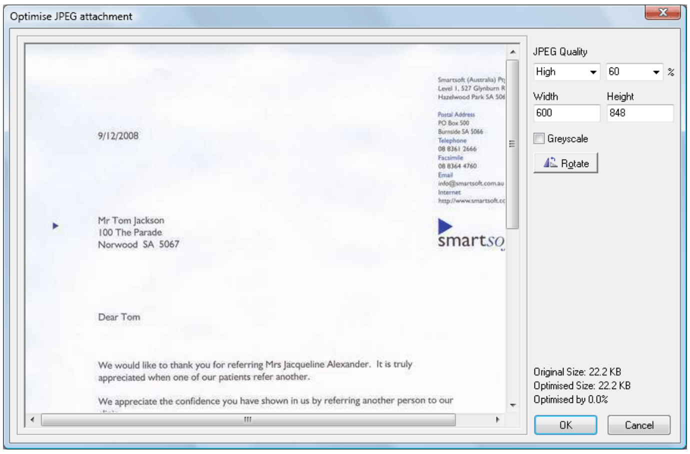
Click **Yes** to add the attachment at the current size.



If you are adding an image, click **No** to add the attachment at the current size or click **Yes** to optimise the image.



Images can also be optimised by selecting the attachment in the list and clicking **Optimise**.



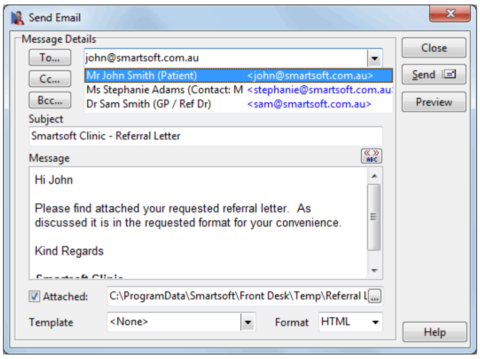
The **Optimise JPEG attachment** screen will allow you to optimise the image in the database. This will convert TIFF and BMP images to JPEGs and allow you to adjust the **JPEG Quality**, convert the image to **Greyscale**, change the dimensions (**Width** and **Height**), or **Rotate** the image. The **Original Size** of the image and the **Optimised Size** will be displayed.

To view an attached file, either highlight the specific attachment and click **View** or double click on that file. To change the description of an attachment, click the **Edit** button, and to remove an attachment click the **Delete** button.

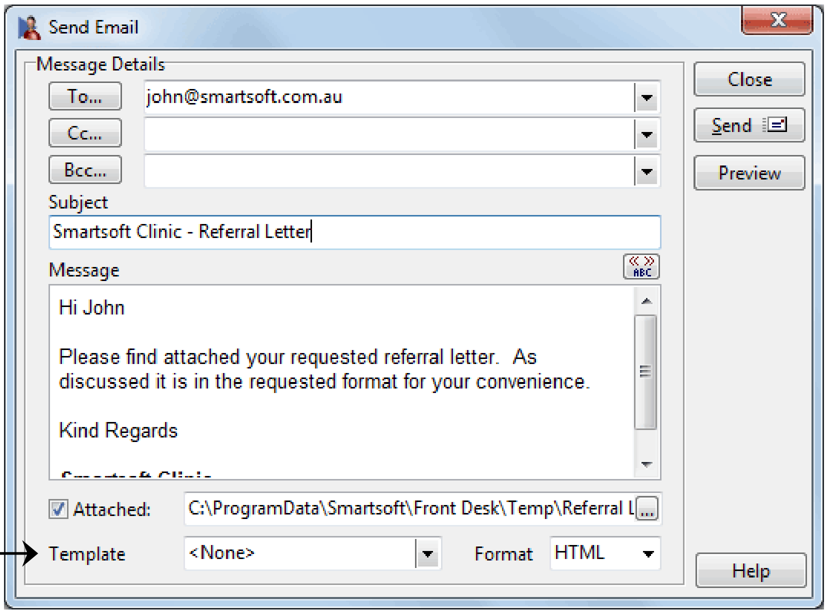
Patient - Attachments

If you wish to email an attachment, select the attachment to email and click the **Email** button. Multiple attachments can be selected by holding the **<CTRL>** key and selecting additional files.

Select an **email address** using the drop-down menu. The available addresses are sourced from the patient details, contacts, 3rd party billers and the GP/referring doctor listed in the patient file.

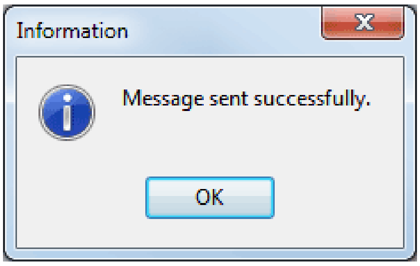


Enter a **Subject** and the **Message**. Messages can be populated automatically by using an existing **Message Template**.



Message Templates

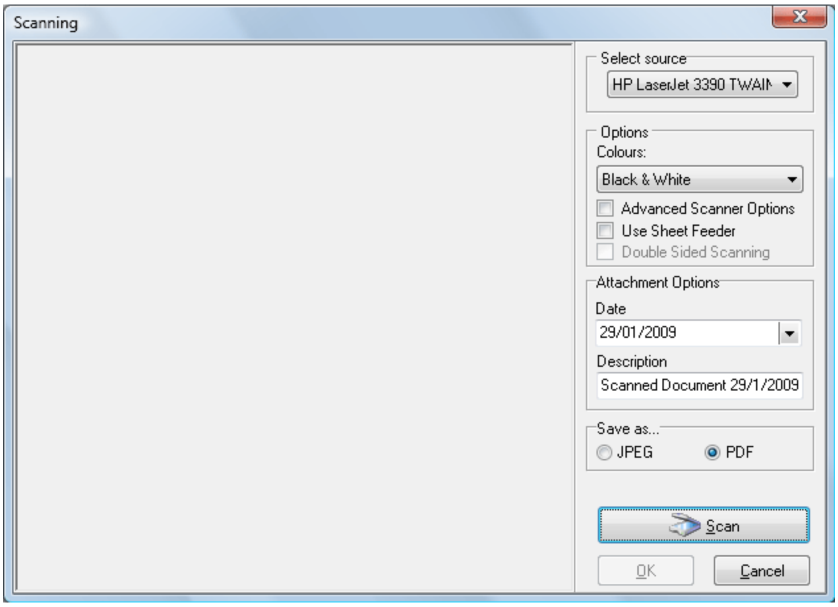
Click the **Send** button to send your email.



Patient - Attachments

Documents can be scanned directly into the **Attachments** section of the patient file. This functionality captures and optimises the document so that it is stored at a usable quality and minimal size. A requirement for the scanning functionality is that your scanner software should be installed and working on your computer prior to scanning from within *Front Desk 2017*.

Clicking the **Scan** button opens the **Scanning** dialog.



Select the desired scanner in **Select Source**. Select from **RGB**, **Grey Scale** or **Black & White** (depending on your scanner's capabilities, you may see different options here) in the **Colours** drop-down box. Checking the **Advanced Scanner Options** will allow you to directly use the scanner software settings, and **Use Sheet Feeder** allows the scanning of multiple sheets using the document feeder of your scanner (if your scanner supports this functionality). The **Double Sided Scanning** option allows users to scan both sides of a document when inserted into the sheet feeder of duplex compatible scanning devices. The **Double Sided Scanning** option will only be available when a device with duplex scanning functionality has been selected.

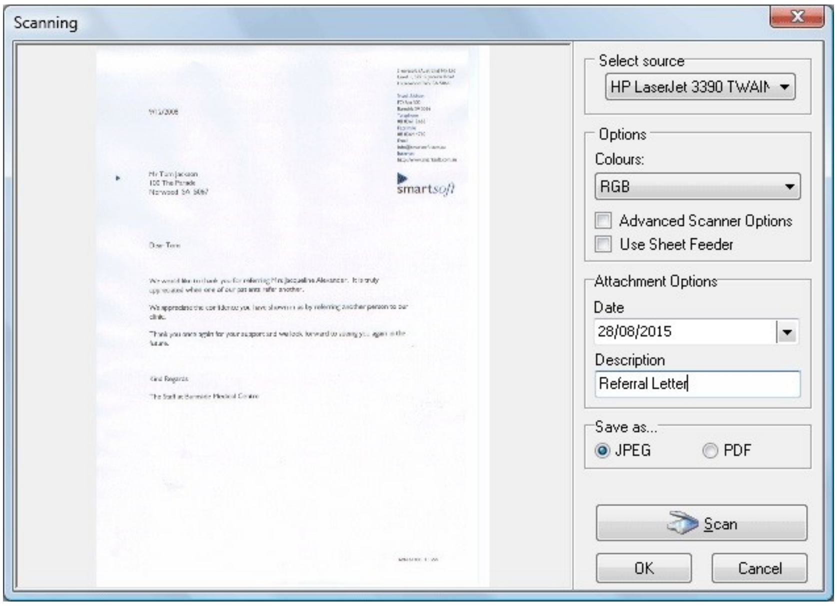
The **Date** the document was scanned and a **Description** can be entered using the respective fields.

Documents are saved as either **JPEG** or **PDF** files. We generally recommend **JPEG** for documents to be viewed on screen and **PDF** for documents to be printed.

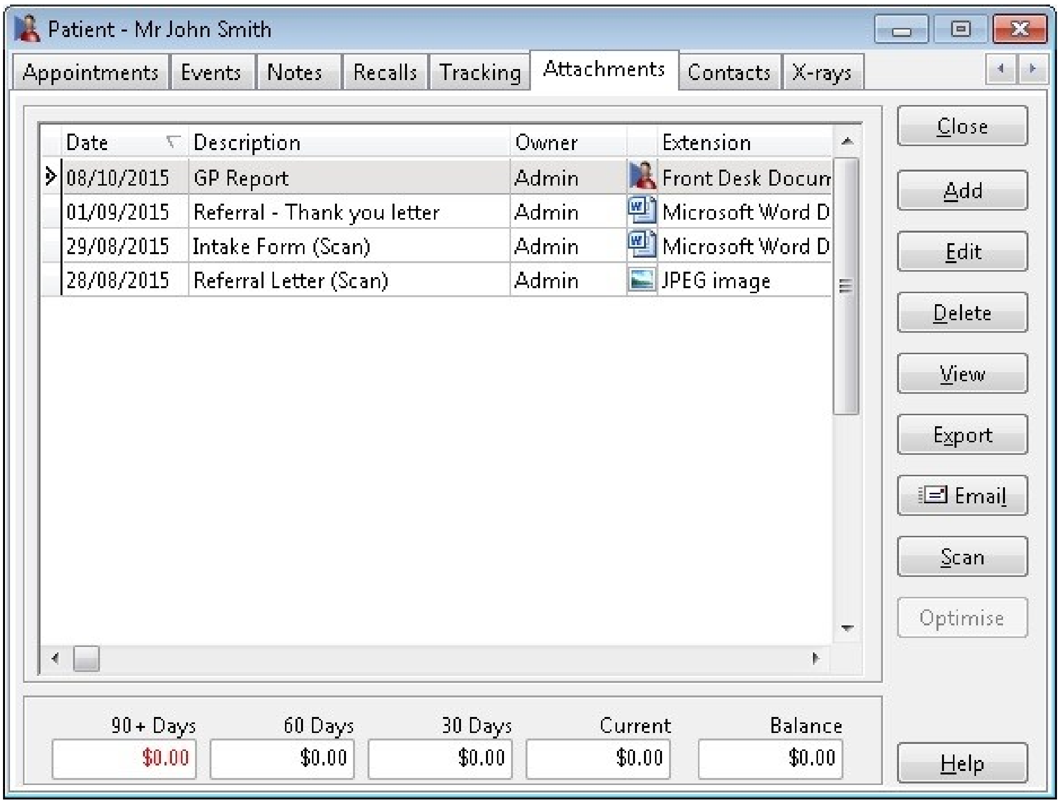
Press the **Scan** button to begin the scanning process.

Patient - Attachments

Once the document has been scanned, a preview of the document will appear in the **Scanning** window. Click **OK** to add the document as an attachment.



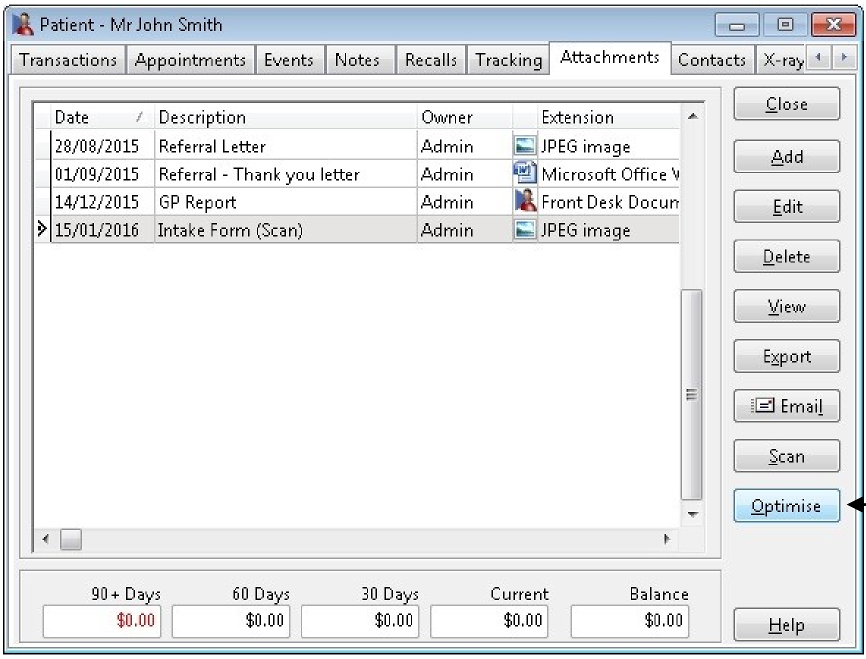
The scanned document has now been saved into *Front Desk 2017* and is available from the **Attachments** tab.



The list of attachments will be listed in date order with the most recent document at the top by default.

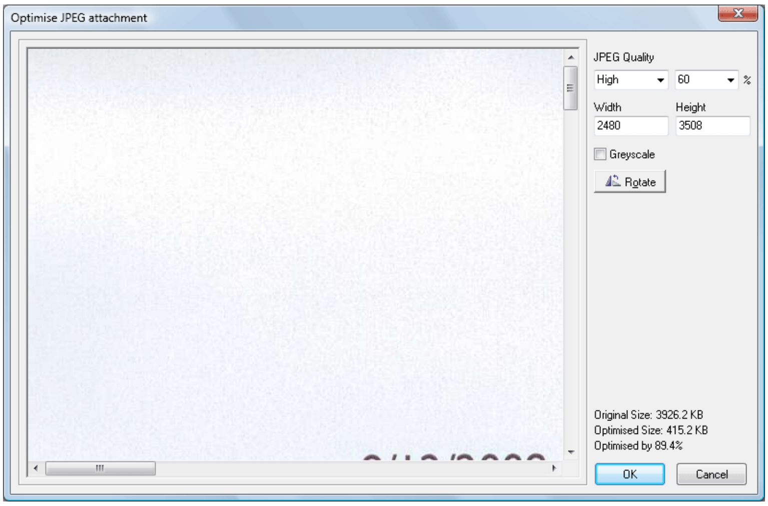
Patient - Attachments

Existing attached images can also be optimised by selecting the attachment and clicking the **Optimise** button on the **Attachments** tab.



Optimise

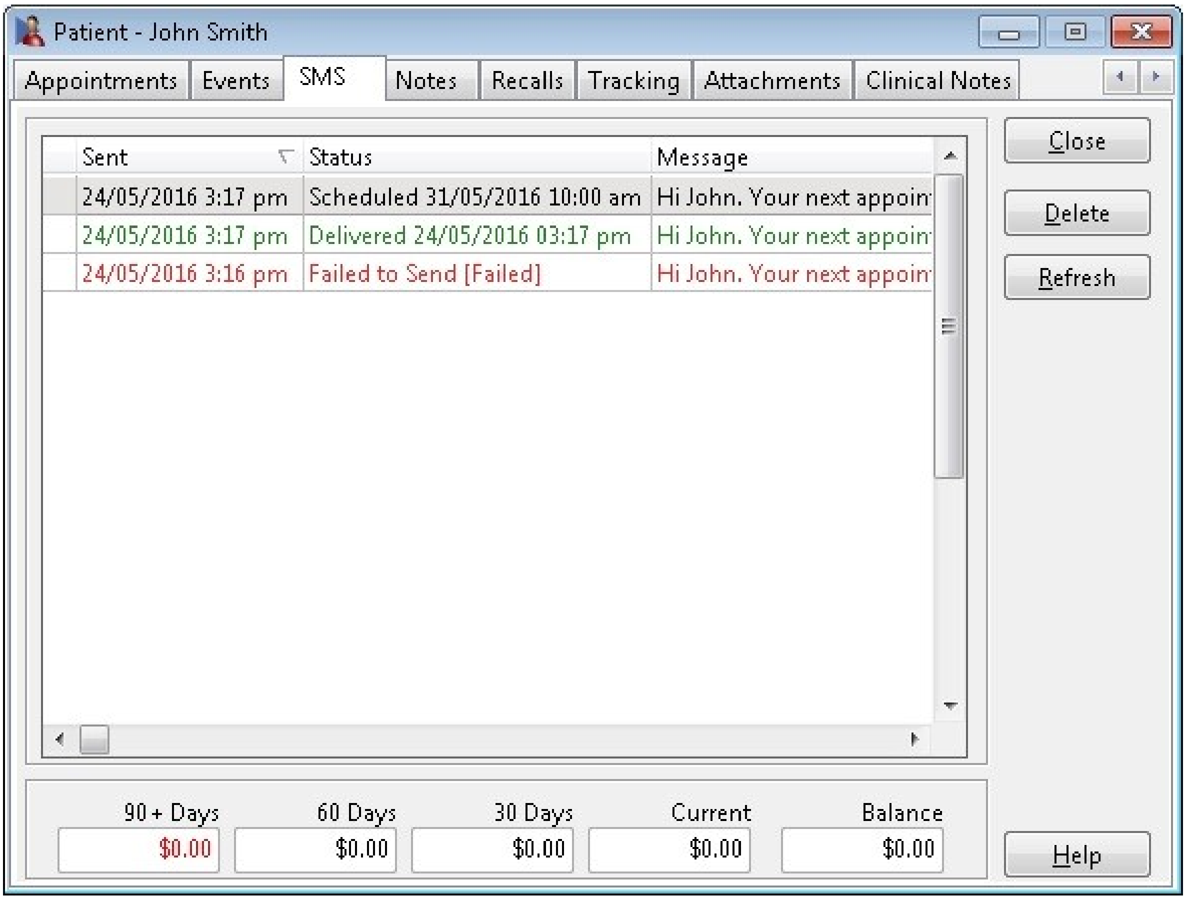
The following dialog will appear allowing you to **Optimise** the file by adjusting the image quality and size (width and height) of these files.



Change attachment characteristics

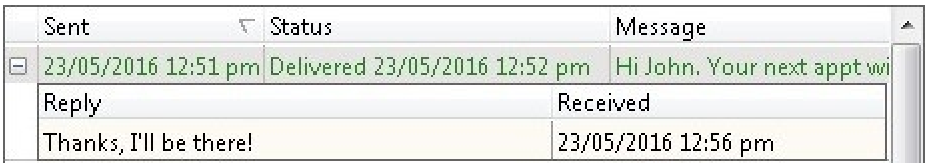
Patient – SMS

Select the **SMS** tab from the patient file.



The SMS tab is used to record SMS sent to a patient as well as any replies received. Further, it can also provide delivery information such as when the SMS was received. Entries into this window are made automatically upon sending or receiving SMS associated with the patient.

SMS replies can be viewed by clicking the plus icon to the left of the message. This will also list the time the reply was received.



Click the **Refresh** button to refresh the contents of this window, displaying any new information available.

Click the **Delete** button to remove the selected SMS record.

Patient – SMS

Through the use of SMS delivery receipts, Front Desk is able to provide an accurate delivery **Status** for each SMS. The status column will update automatically:

Message Sent
The message has been sent prior to the introduction of delivery receipts, and no confirmation of delivery is available. (Included for backwards compatibility)

Message Sent – Delivery Pending:
The message has been successfully sent to the destination mobile provider, however a delivery confirmation has yet to be received.

Scheduled (Date + Time)
The message has been successfully sent to Smartsoft and will be forwarded to the destination mobile provider at the scheduled date and time.

Delivered (Date + Time)
The message has been successfully delivered and a delivery receipt has been received including the date and time of arrival to the patient's handset.

Delivery Failed (Date + Time)
The message has been sent from Smartsoft to the destination mobile provider, however a delivery receipt has been received stating the message failed to reach the patient's handset. The date and time indicates when the failure confirmation was received.

Confirmed failures could be due issues with the destination provider or the device itself, and may include:

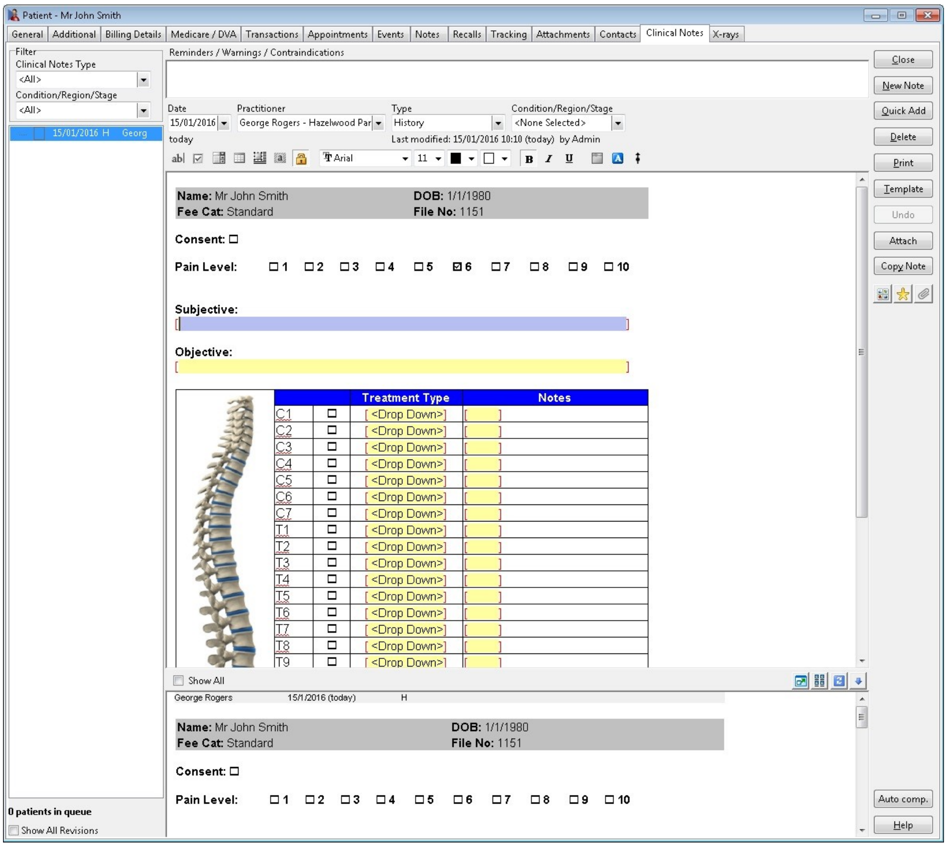
- Mobile plan limitations.
- Service outages.
- Loss of signal.
- Handset faults (hardware/software).

Failed to Send
The message has failed to send from your Front Desk system to the Smartsoft SMS gateway. An error will be displayed at the time of sending detailing why the message did not send, and additional information may be appended to the status as follows:

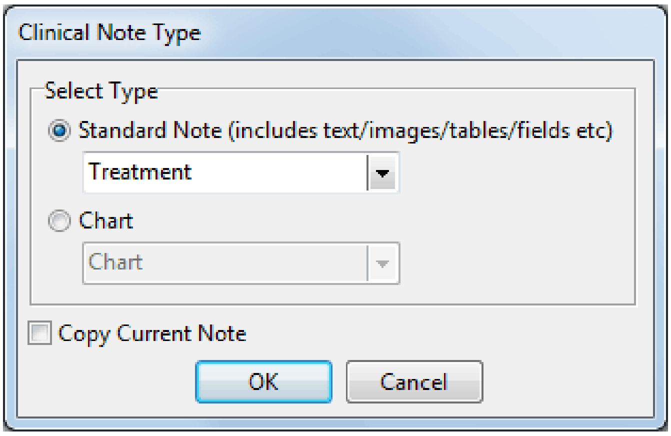
- Failed to Send [Incomplete]
- Failed to Send [Failed]
- Failed to Send [Login Failed]
- Failed to Send [No Credit]
- Failed to Send [Can't Connect]
- Failed to Send [No DNS]

Patient - Clinical Notes

Select the **Clinical Notes** tab from the patient file.

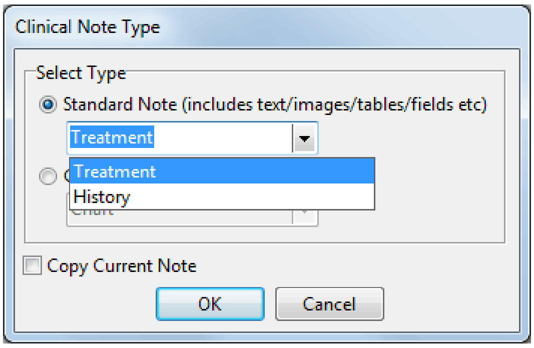


To add a clinical note, click **New Note**.



Select a **Clinical Note Type** from the drop-down list. The default clinical note types are **Treatment**, **History** and **Chart**. Additional types can be created by selecting **Clinical Note Types** from the **System** menu.

Patient - Clinical Notes



The **Treatment** note type is generally used to enter notes regarding the treatment provided on a particular consultation.

The **History** option allows you to enter notes regarding the patient's clinical history.

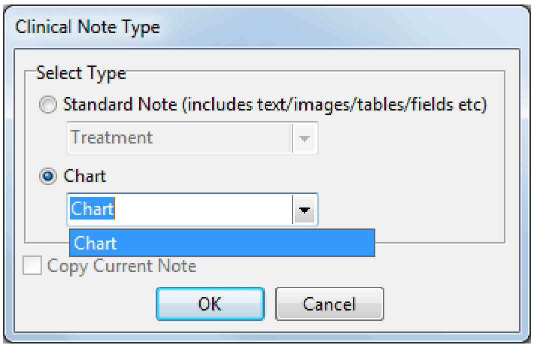


Chart allows the user to insert a diagram or image, where annotations such as text, lines, shapes or freehand drawings can then be added, typically on a body chart.

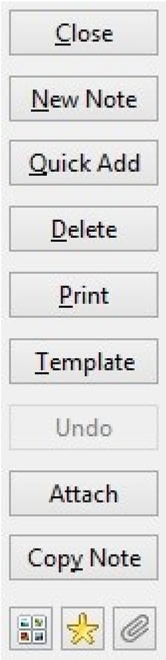
The **Copy Current Note** option allows users to copy the currently selected clinical note into a new note which can then be expanded upon.

Click **OK** to add the new clinical note. The created blank clinical note will be dated and displayed on the left of the screen. Information can then be added to the main body of the note as required.

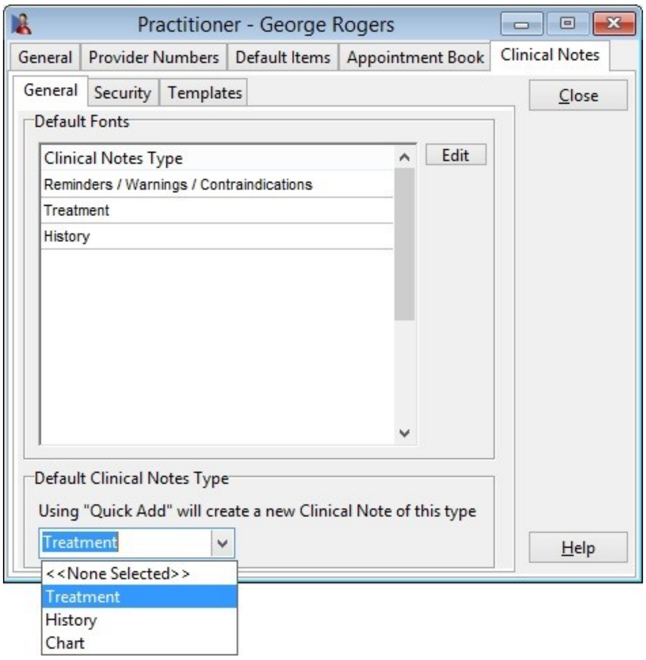
To create additional notes select the **New Note** button as required.

Patient - Clinical Notes

Quick Add will create a new note with a pre-set Clinical Notes Type, depending on the defaults set within the **Clinical Notes** tab of the Practitioner file.

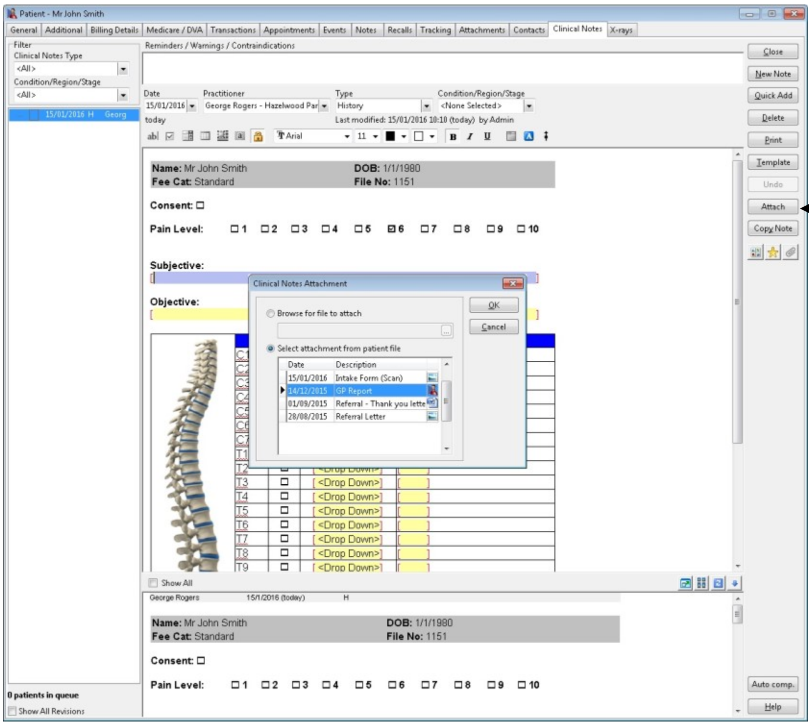


This is useful if a practitioner is consistently using the same Clinical Notes Type and doesn't wish to select it each time when creating a new clinical note.



Patient - Clinical Notes

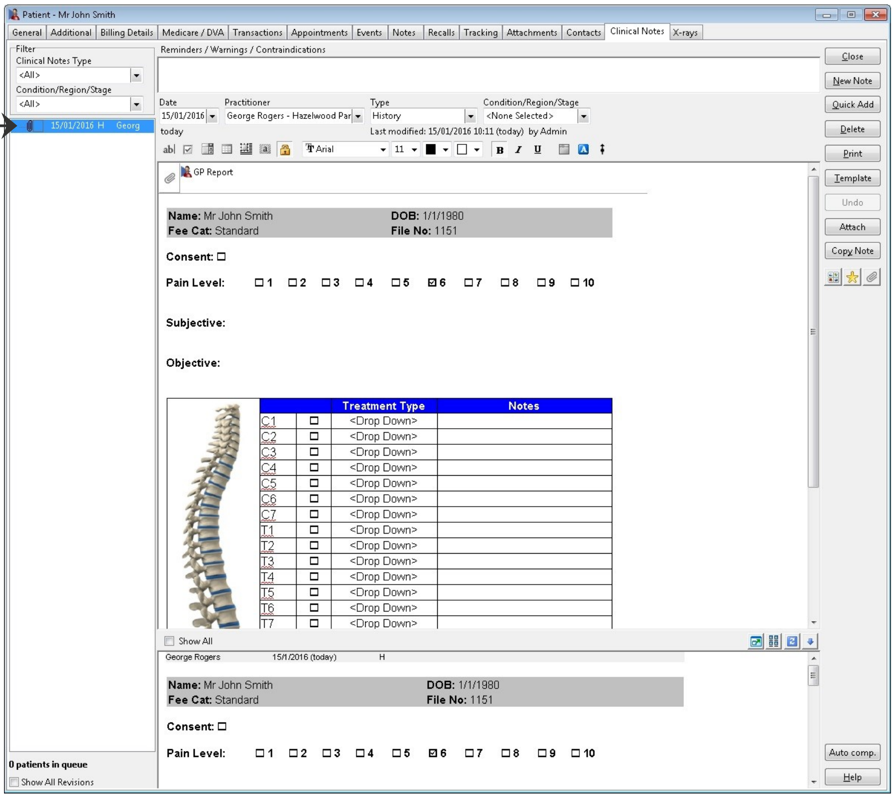
Attachments can be added to a patient's clinical notes by clicking the **Attach** button from the right hand menu.



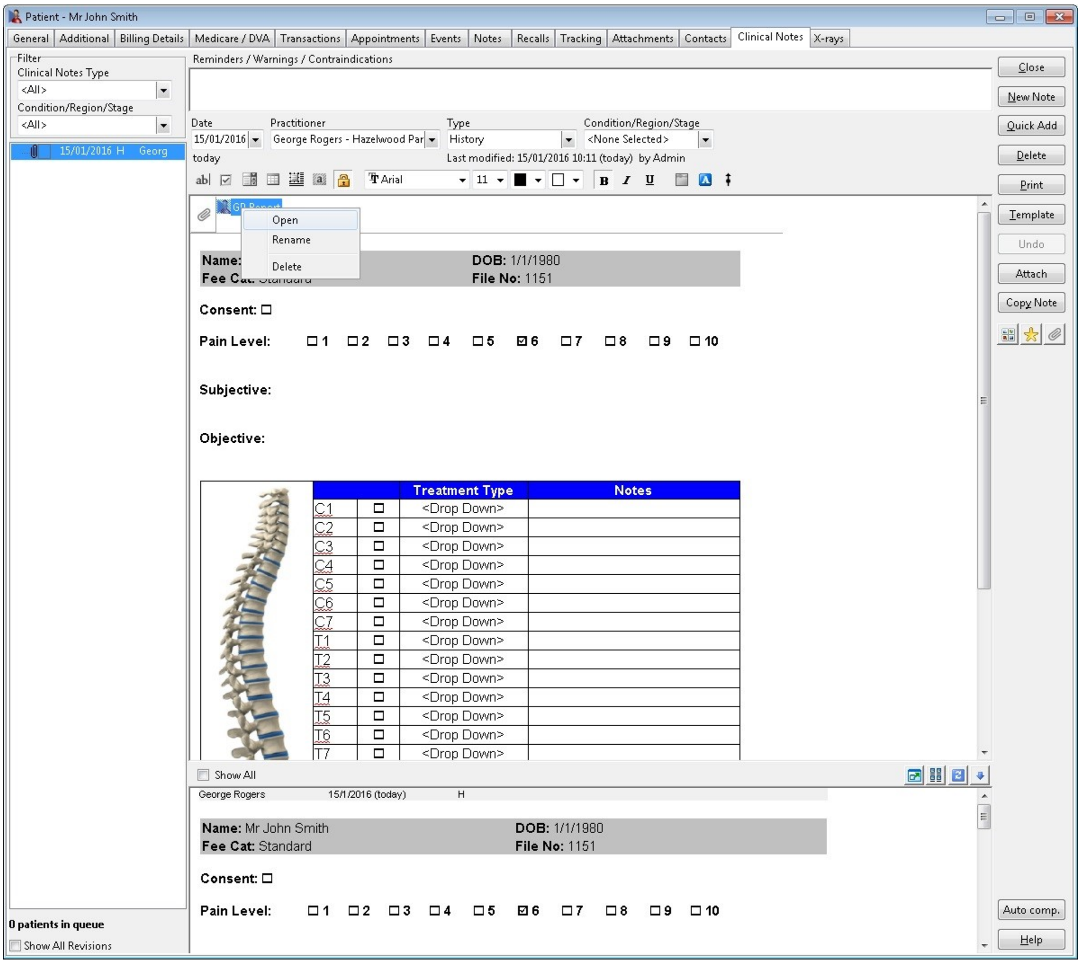
Attach a file to a Clinical Note

Files can be attached by either browsing for the files on your computer, or selecting an existing patient attachment previously added in the patient's **Attachments** tab.

Clinical Note with Attachment



Patient - Clinical Notes



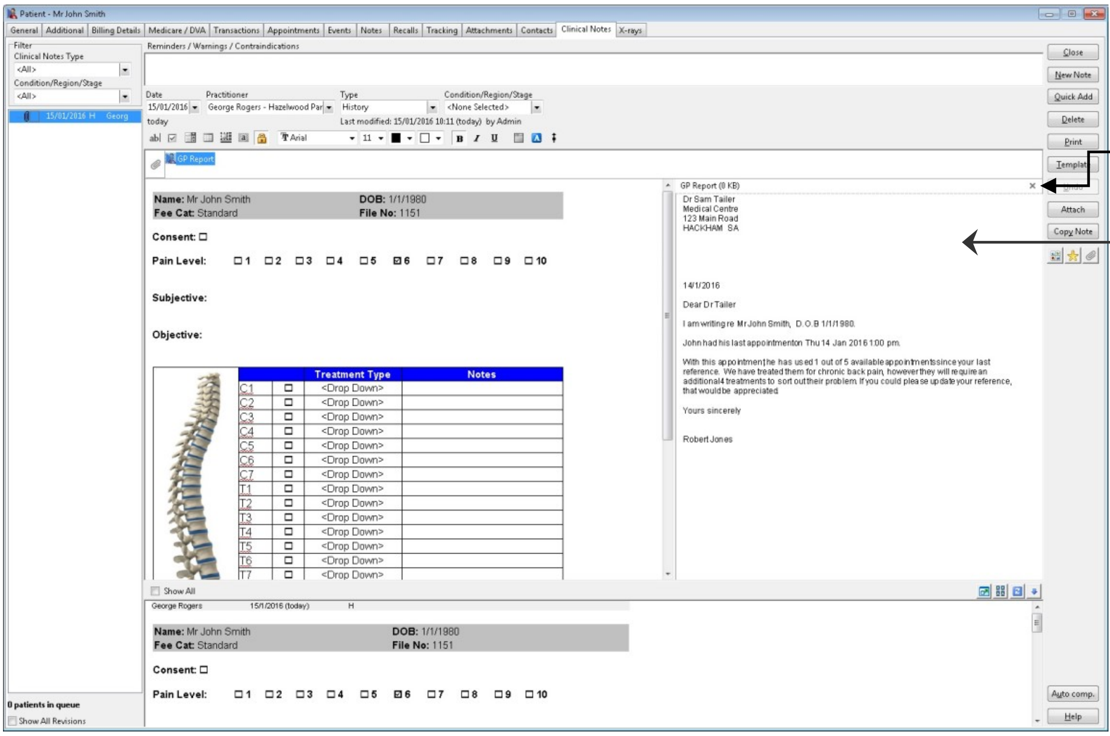
Attachments can be renamed by right clicking on the attachments and selecting **Rename**.

To delete a clinical note attachment, select the clinical note, right click on the attachment and click **Delete**.

When selecting a clinical note attachment, a **preview** will automatically appear for compatible documents. The following file types are compatible to preview within clinical notes:

Adobe .PDF®	Microsoft Word®	Front Desk Documents
Text Files	.JPEG	.PNG
.TIFF	.GIF	.BMP

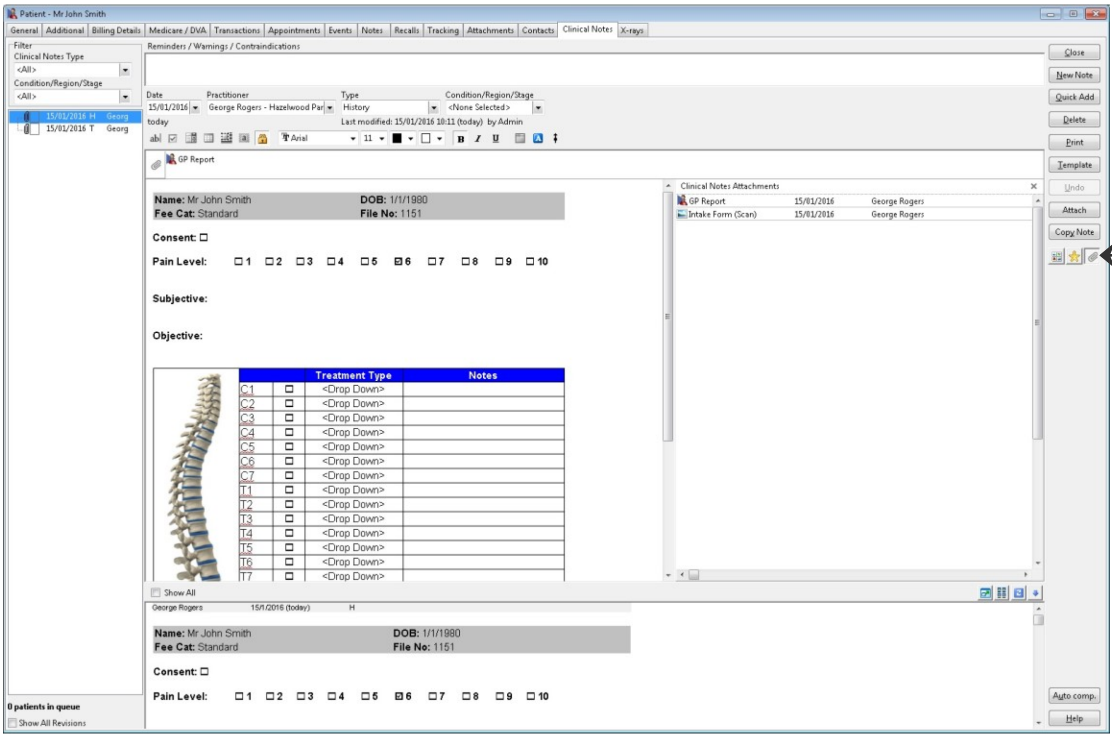
Patient - Clinical Notes



Hide the preview window.

Preview window

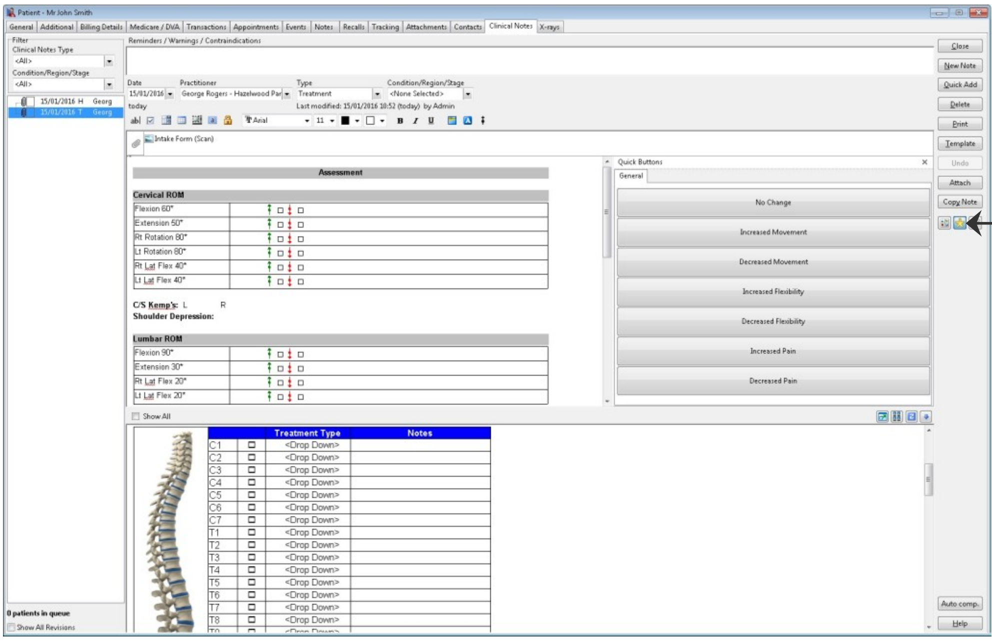
To view a list of all clinical notes attachments, click **Show All Attachments** from the right menu.



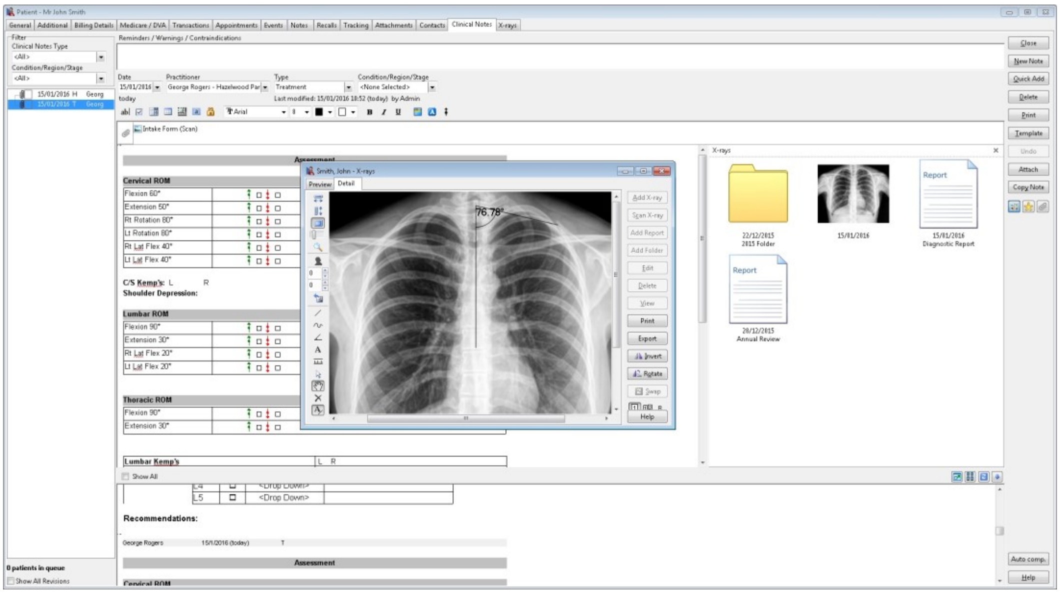
Show All Attachments

Patient - Clinical Notes

Quick Buttons may be used to insert predefined text directly into a clinical note. Click **Show Quick Buttons** to view the available **Quick Buttons**.



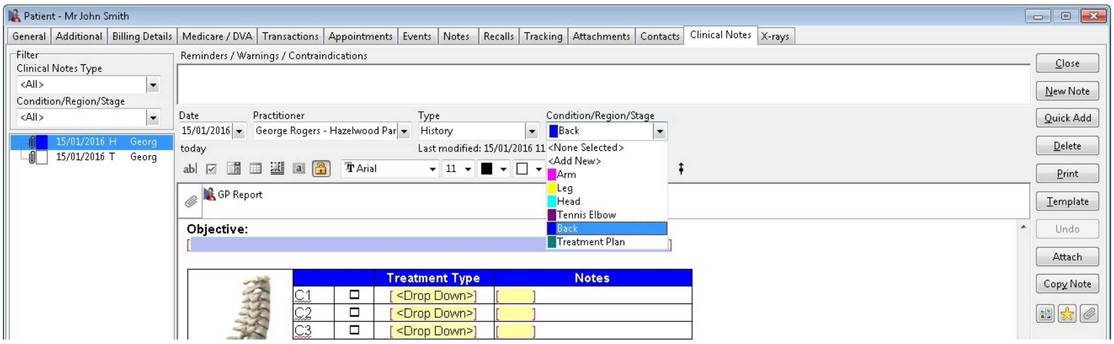
X-rays stored in the patient file may be accessed from within Clinical Notes by selecting **Show X-ray Thumbnails**. Double clicking an x-ray thumbnail will open the x-ray in a new window, which can be positioned manually by the user.



Clinical notes can be assigned a **Condition/Region/Stage** to assist in categorising your clinical records. Assigning a clinical condition will color-code the clinical notes listing to allow for easy recognition of the notes contents.

To assign a clinical condition, region or stage select the desired option from the **Condition/Region/Stage** drop-down menu.

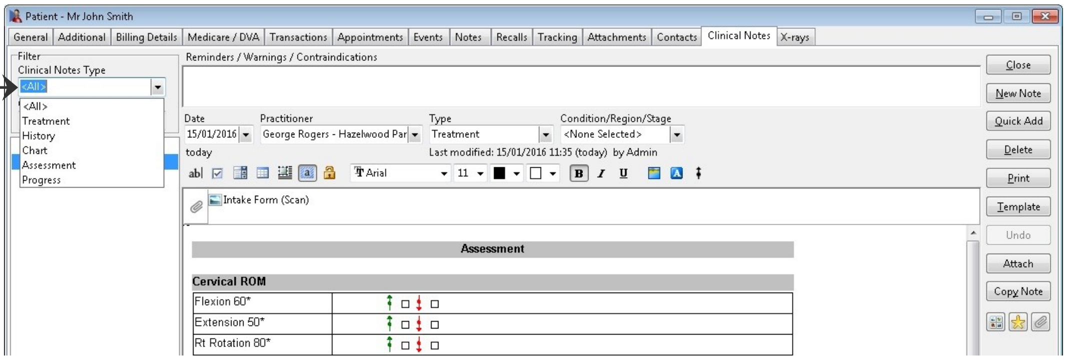
Patient - Clinical Notes



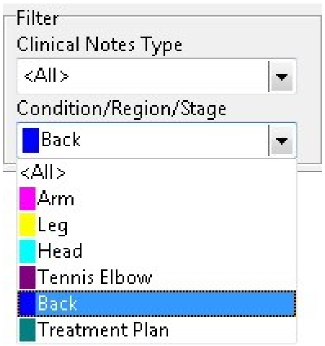
To create a new **Condition/Region/Stage** from within clinical notes click **Add New**.

To view clinical notes of a specific **Clinical Note Type**, select the clinical note type from the left drop-down list. To view all entries click **All**.

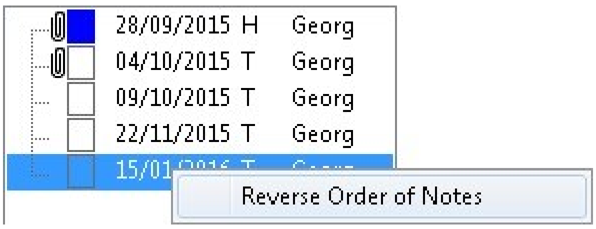
Clinical note types to display



To view entries for a specific **Clinical Condition/Region/Stage**, select the specific condition, region or stage from the left drop-down list. To view all entries click **All**.



To temporarily change the order in which clinical notes are listed, right click on the clinical notes listing and select **Reverse Order of Notes**. Your preferred ordering can be permanently set under the **Clinical Notes** tab in **System Information**.



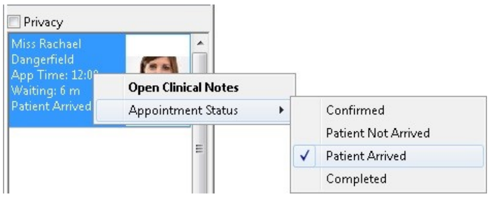
Patient - Clinical Notes

Practitioner Queue of waiting patients can be viewed from within clinical notes by expanding the practitioner queue area. This option is only available if at least one patient is currently in the queue.

This allows practitioners to monitor waiting patients without leaving clinical notes area.

Importantly, you can bring up the notes for the next patient by double-clicking a patient within the practitioner queue.

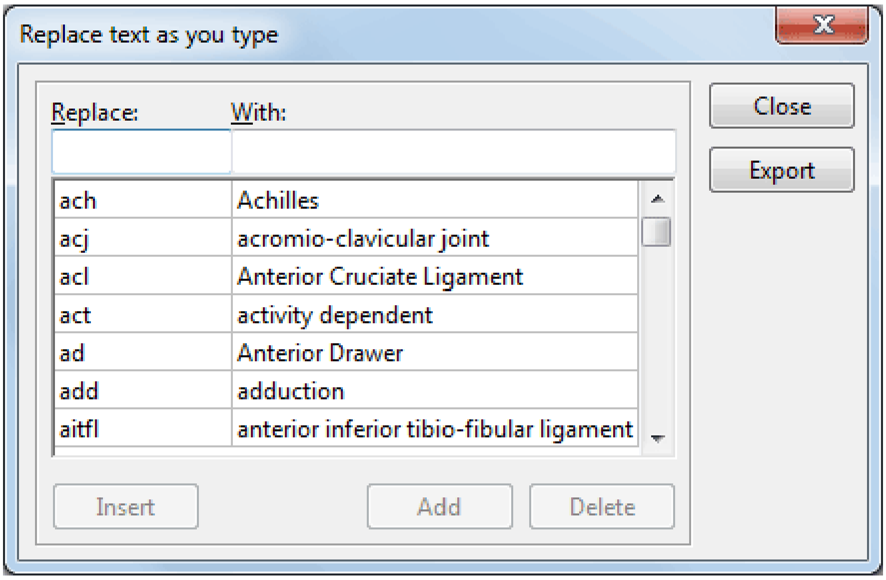
Right click the patient to adjust the **Appointment Status**.



For increased privacy select the **Privacy** option to hide the patient's name and associated image, until this information is required.

Patient - Clinical Notes

To create shortcuts for commonly used expressions click the **Auto Complete** button.



Type the abbreviation in the **Replace** field and then type the full text in the **With** field. For example if you type *dob* anywhere in clinical notes it will be replaced with *Date of Birth*. The abbreviation can be set to case sensitive in **System Information**.

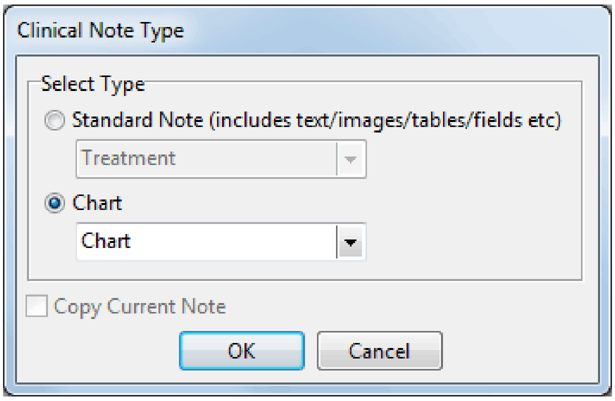
If you wish to remove a shortcut, highlight it and click the **Delete** button. If you wish to replace an existing shortcut, edit the **With** field and then click **Replace**.

To insert the replacement into the current clinical note click the **Insert** button.

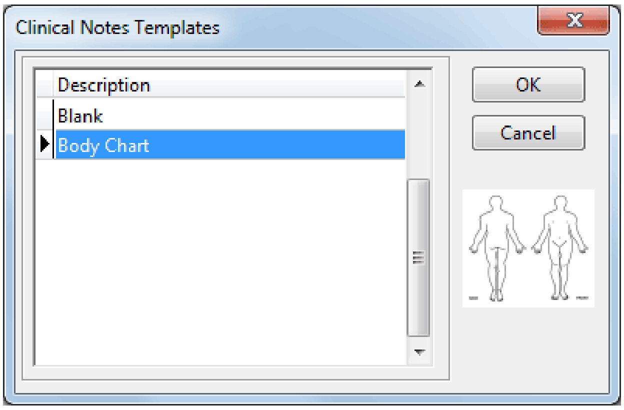
To export a list of the auto complete entries to CSV or Microsoft Excel®, click the **Export** button.

Patient - Clinical Notes

To add a chart into clinical notes click **Add** and select the **Chart** option. Click **OK**.

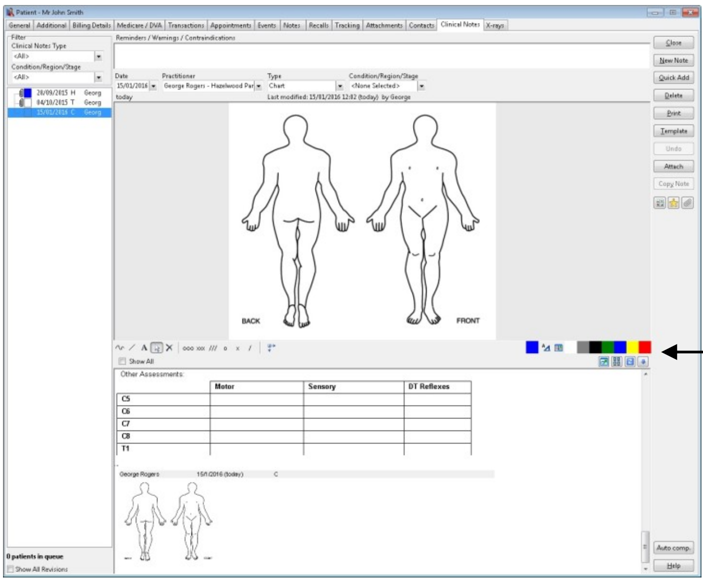


Select the chart you wish to insert from the list and click **OK**.



When using **Charts** annotations can be added such as text, lines or freehand drawings. A **full screen editor** is available by double-clicking on the chart, or additions can be made directly from the **Clinical Notes** window.

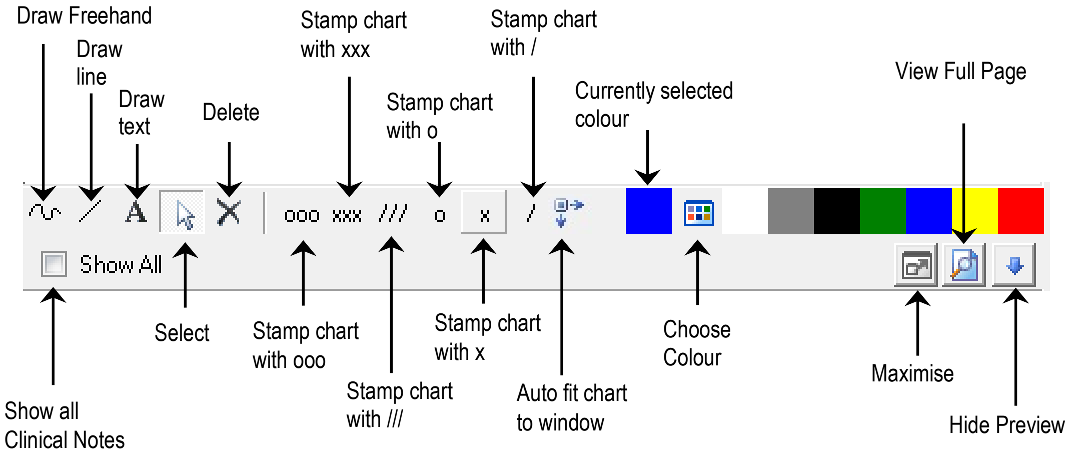
Annotation



Colours

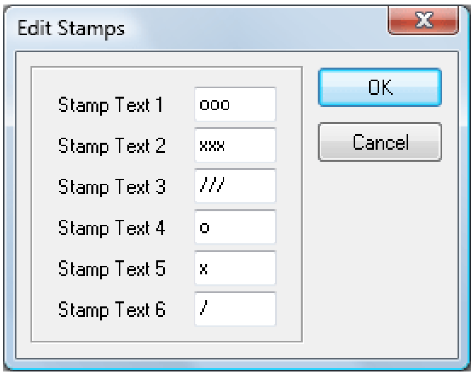
Patient - Clinical Notes

The annotation options are as follows:

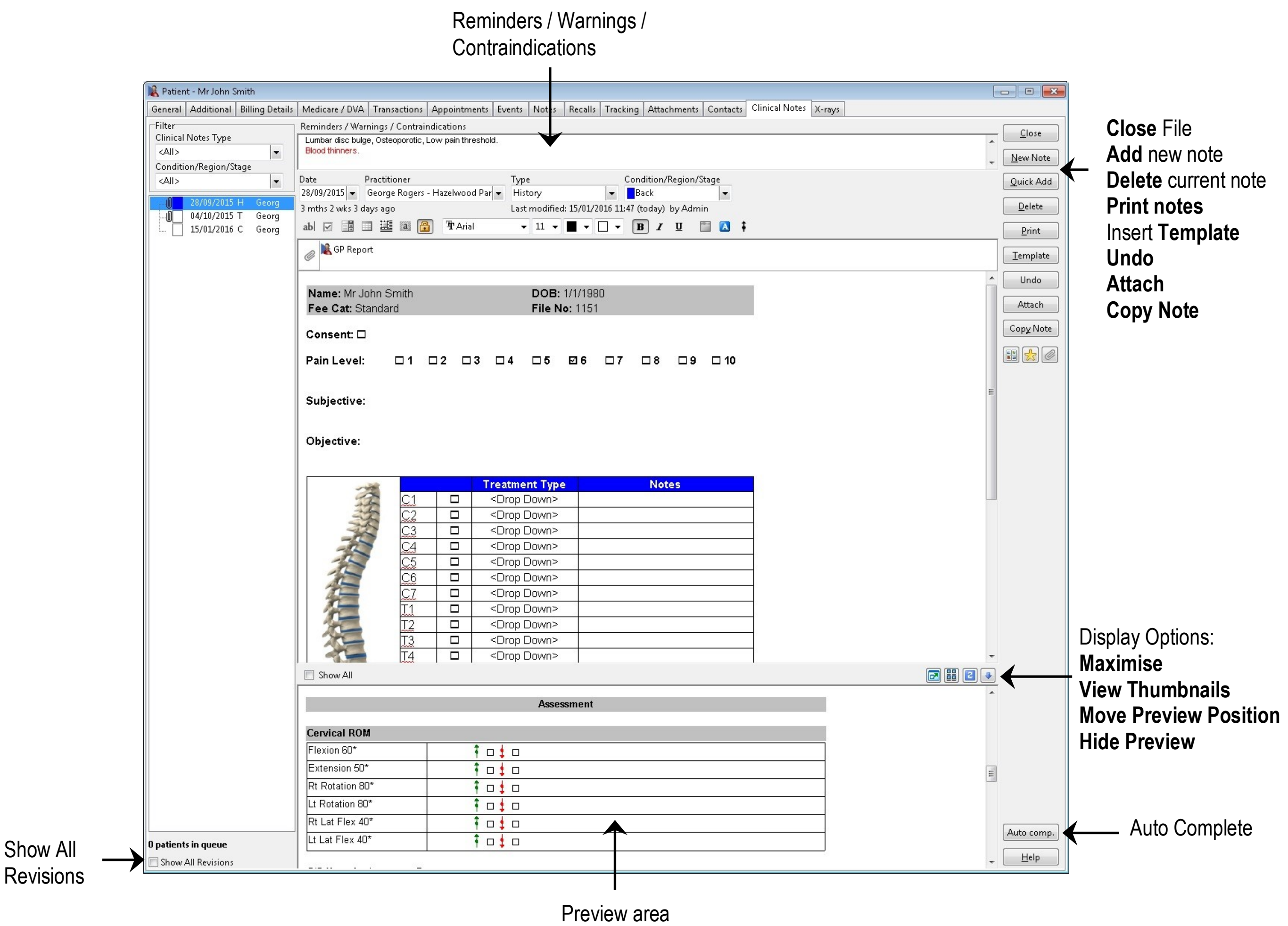


To edit the available **Stamps**, right click on the annotations toolbar and select **Edit Stamps**.

Type between 1 and 3 characters to edit the stamp text as required.

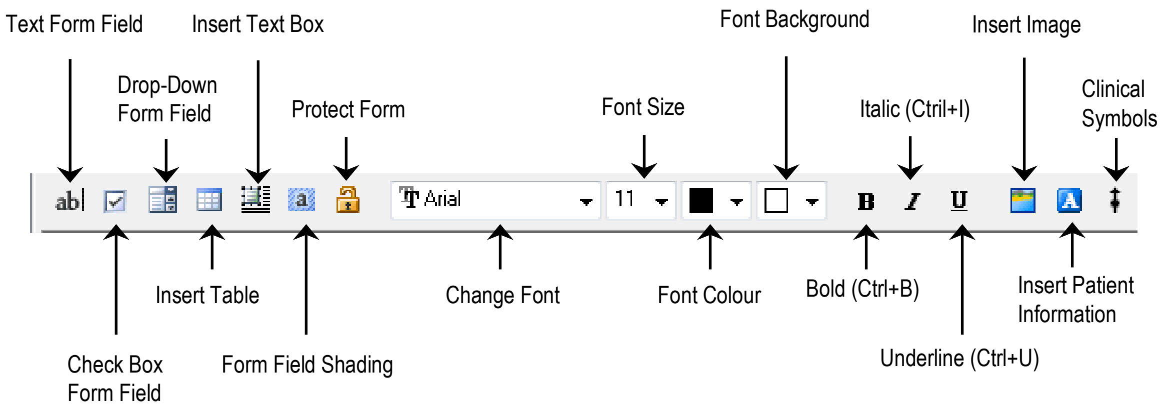


Patient - Clinical Notes



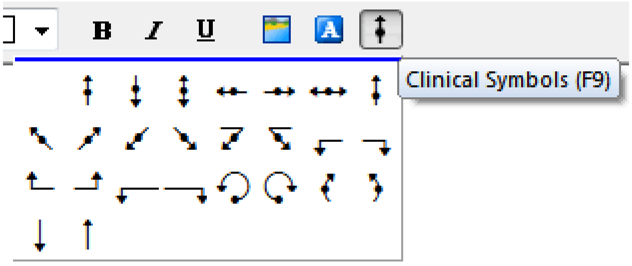
The **Show All Revisions** option will allow the user to view earlier clinical note revisions. Clinical notes will be recorded as a revision of an original note if a change is made after the **Edit / Revision Period**, to allow the required time to complete your notes. The **Edit / Revision Period** can be configured on the **Clinical Notes** tab in **System Information**.

The following options are available on the **Clinical Notes** toolbar.

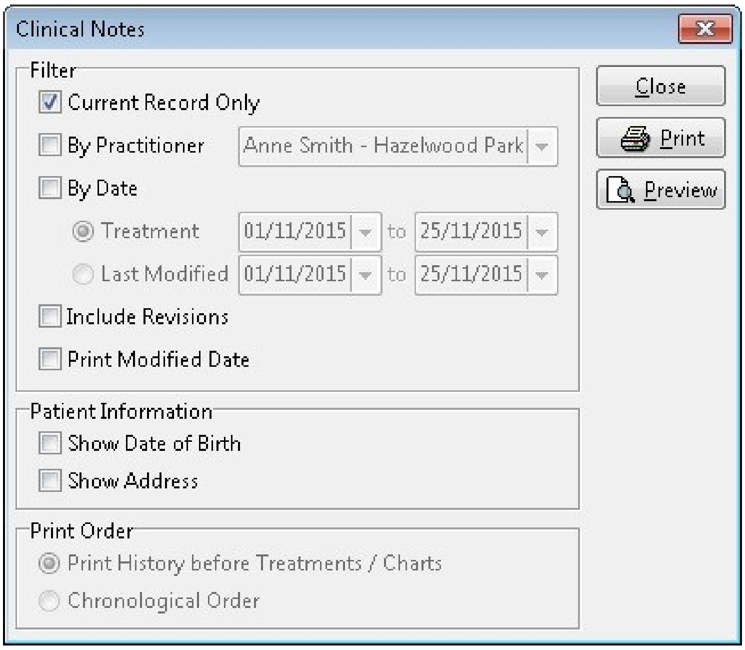


Patient - Clinical Notes

Clinical Symbols can be added by clicking the **Clinical Symbols** icon or pressing **<F9>**.



To print clinical notes click the **Print** button. The following window will appear.



Current Record Only will print the current clinical note. Select **By Practitioner** to print clinical notes from a particular practitioner. Select **By Date** to print clinical notes entered in a particular date range. This can be filtered further by selecting the **Treatment** date or **Last Modified** date.

Select **Include Revisions** to include revisions when printing.

Select **Print Modified Date** to include the last modified date when printing.

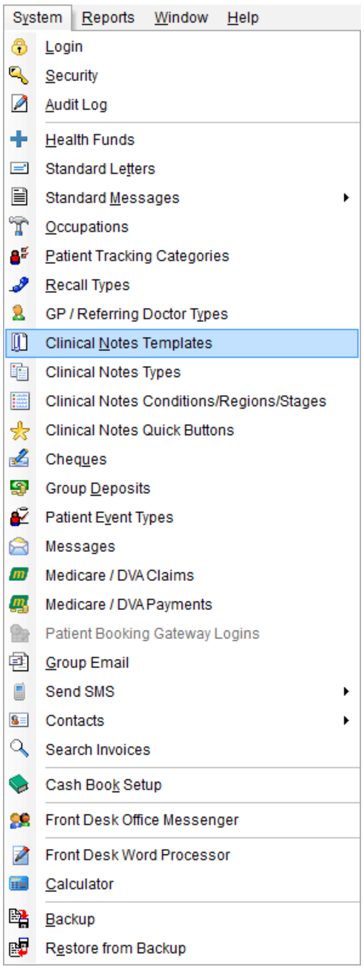
To include the patient's date of birth and/or address on the clinical note printout select **Show Date of Birth** or **Show Address**.

The print order can be changed by selecting **Print History before Treatments / Charts** or **Chronological Order**.

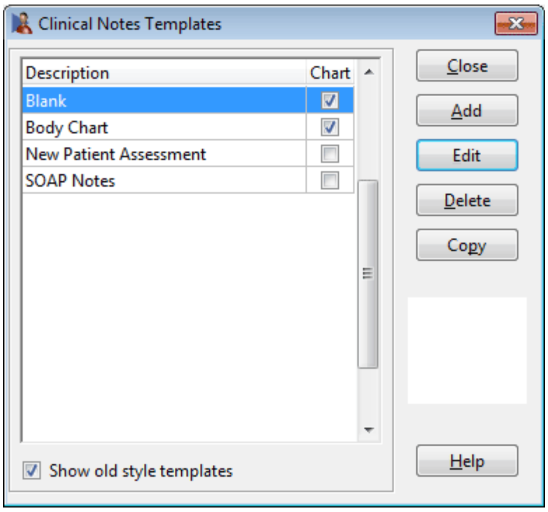
Previous changes made to a particular clinical note can be reverted back to the last save using the **Undo** button. Please note that clinical notes are saved automatically when moving off the current notes field.

Clinical Notes Templates

To set up templates for clinical notes, select **Clinical Notes Templates** from the **System** menu.

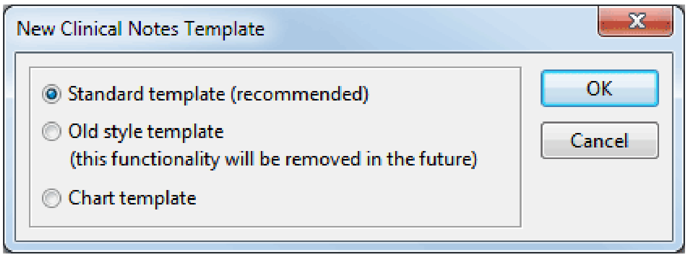


To create a new template, click the **Add** button.



Clinical Notes Templates

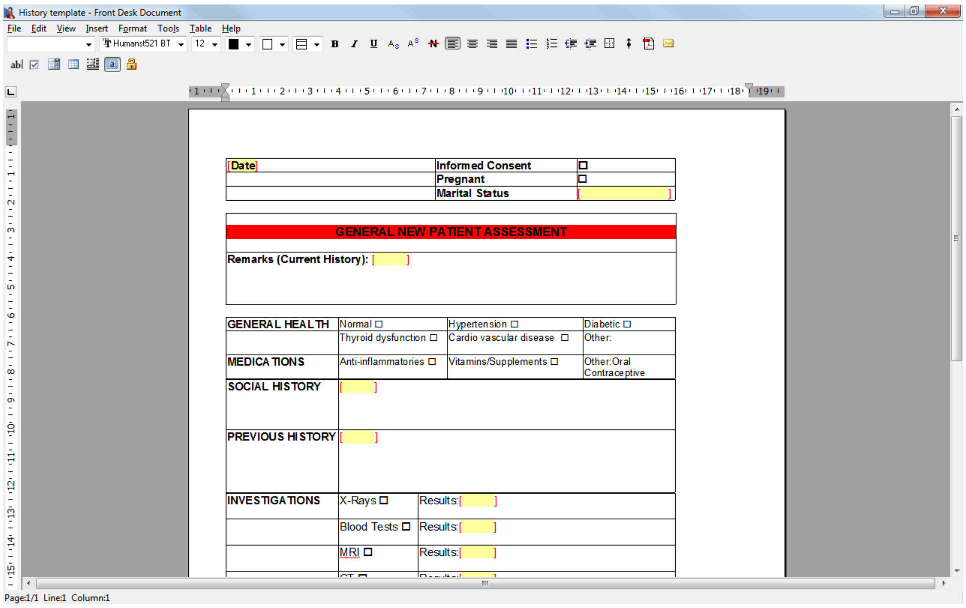
The following window will appear.



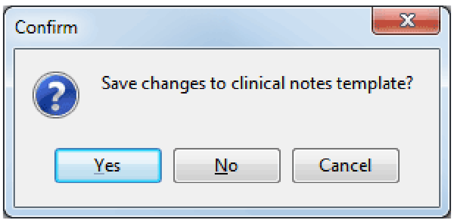
Choose **Standard template (recommended)** to create a History or Treatment template and click **OK**.

The **Old style template** option is provided for backwards compatibility reasons.

The **Front Desk Word Processor** will be displayed as shown below. Enter the template using the desired formatting, such as: text fields, drop-down fields, checkboxes, tables and *Front Desk 2017* letter tags.



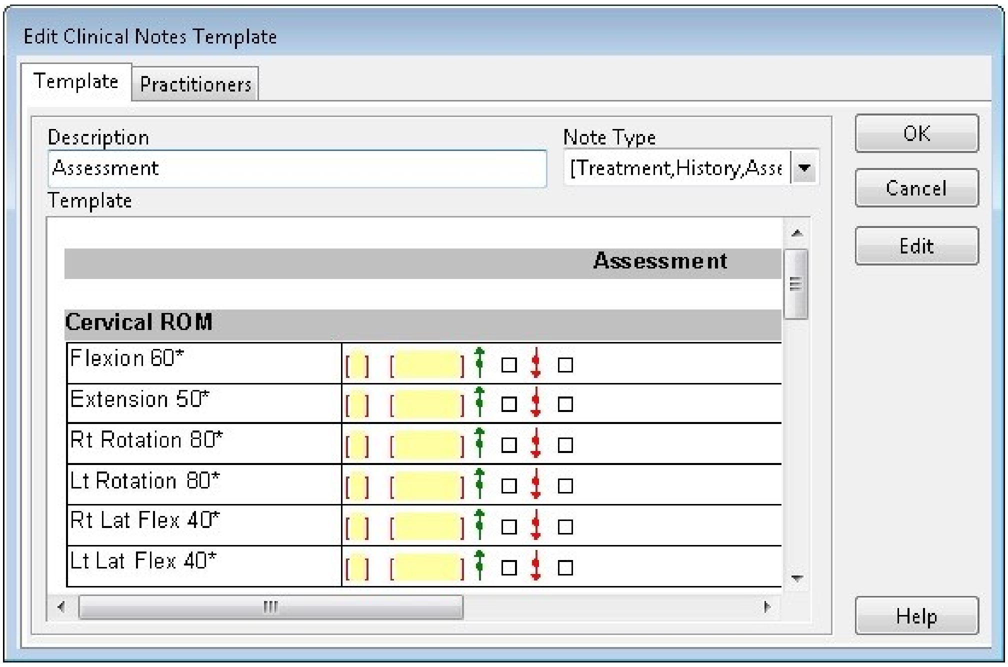
Once completed, close the **Front Desk Word Processor**. The following message will be displayed.



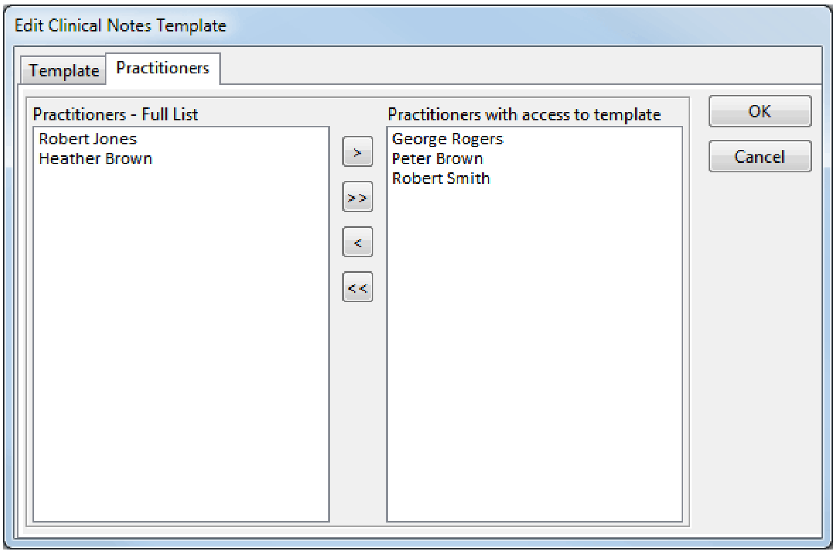
Select **Yes** to save, **No** to close without saving or **Cancel** to return to the template.

Clinical Notes Templates

The **Clinical Notes Template** dialog box will be presented as shown below. Enter the **Description** of the template and select the **Note Type** this template will be available for.



Select the **Practitioners** tab. This section enables you to set up access rights for specific templates. By default all practitioners have access to new templates.

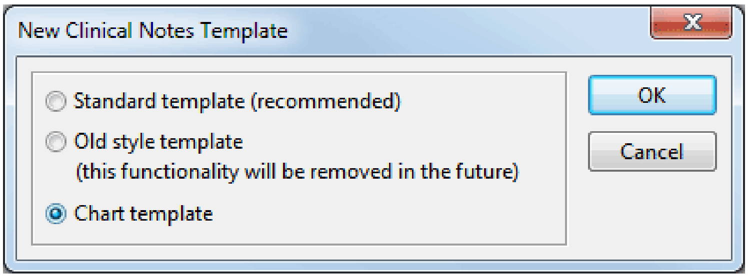


Select the practitioner who requires access to this specific template from the list on the left, and move them to the right-hand side by using the arrow buttons.

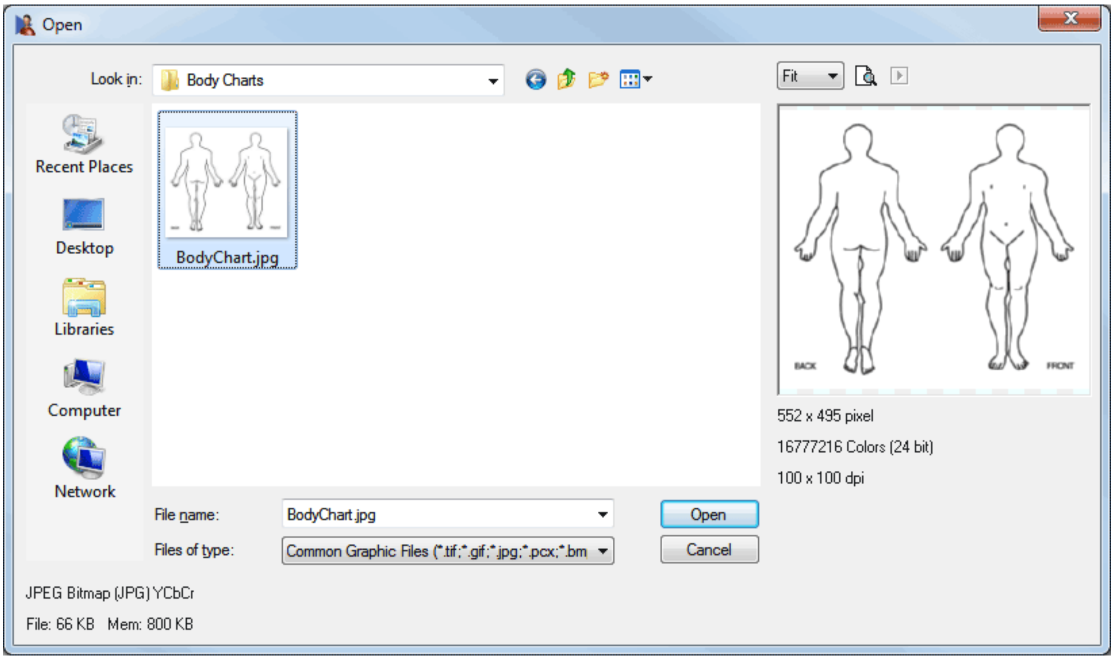
The drag-and-drop technique may also be used. To select multiple practitioners hold down the **<CTRL>** key on the keyboard then make your selection with the mouse.

Clinical Notes Charts

To add a chart as a template, select the **Chart template** option from the **New Clinical Notes Template** section.

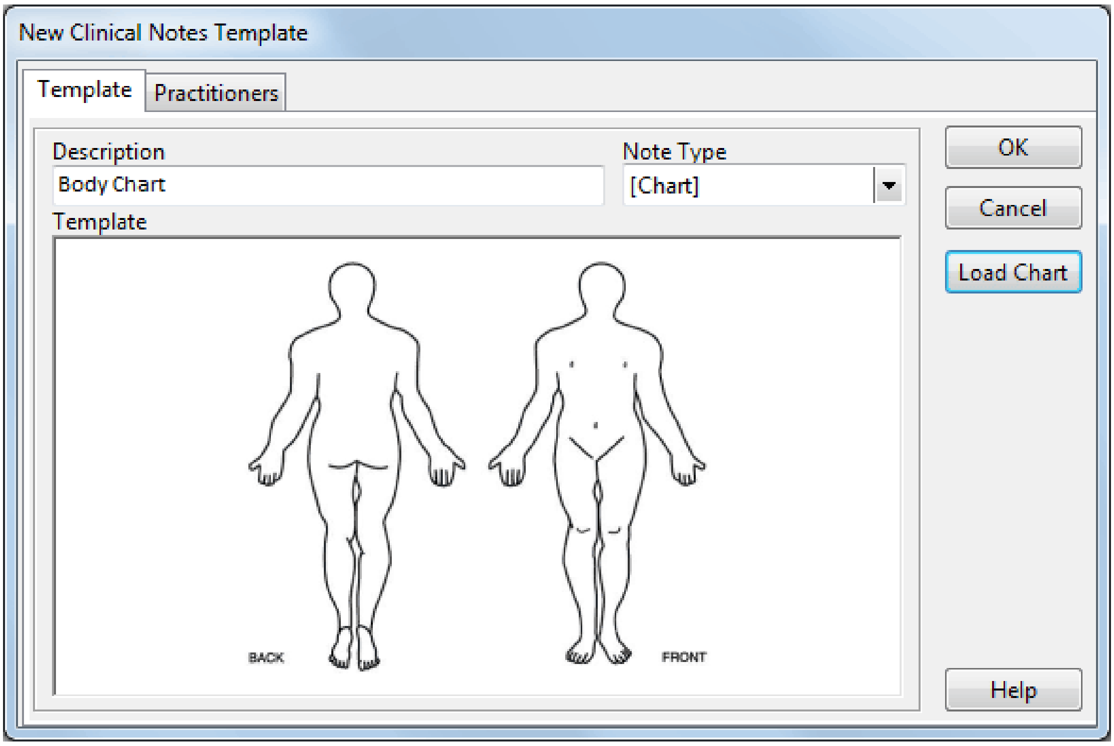


Click **OK** and browse for the image file to be used as the chart.

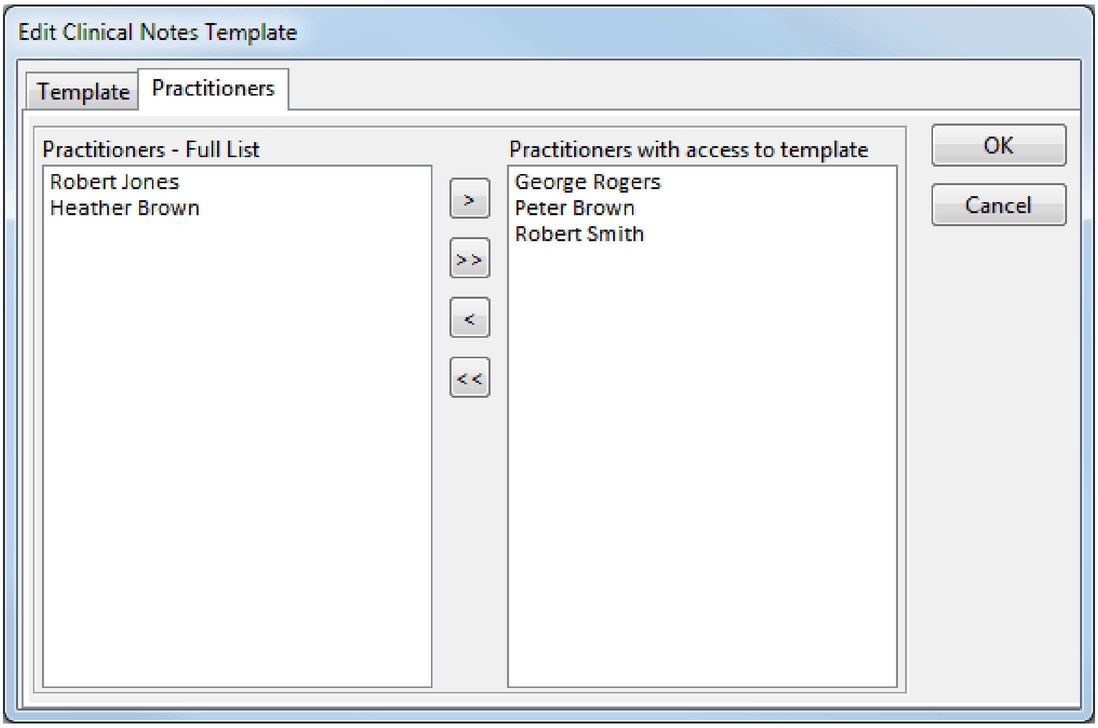


Clinical Notes Charts

The chart will be inserted as a template.

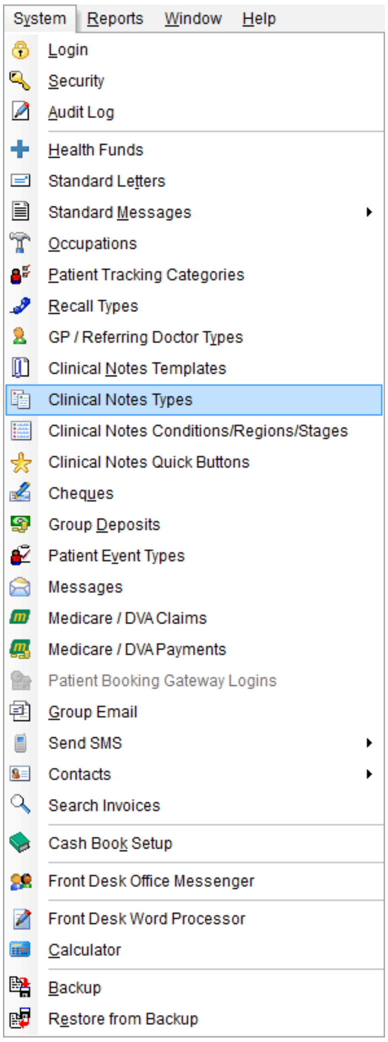


Select the **Practitioners** tab. This section enables you to set up access rights for specific charts. By default all practitioners will have access to new charts.

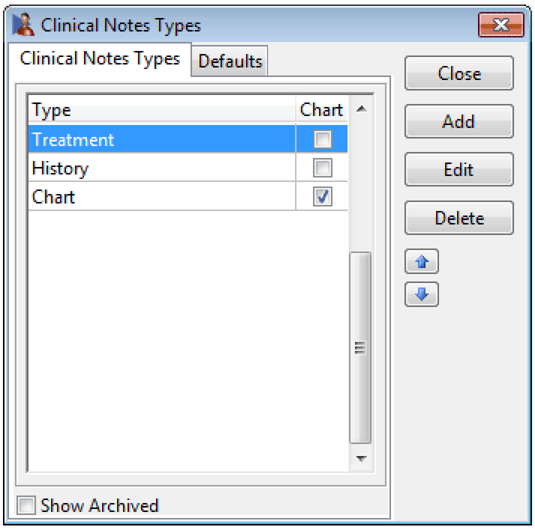


Clinical Notes Types

To set up additional clinical notes types, select **Clinical Notes Types** from the **System** menu.



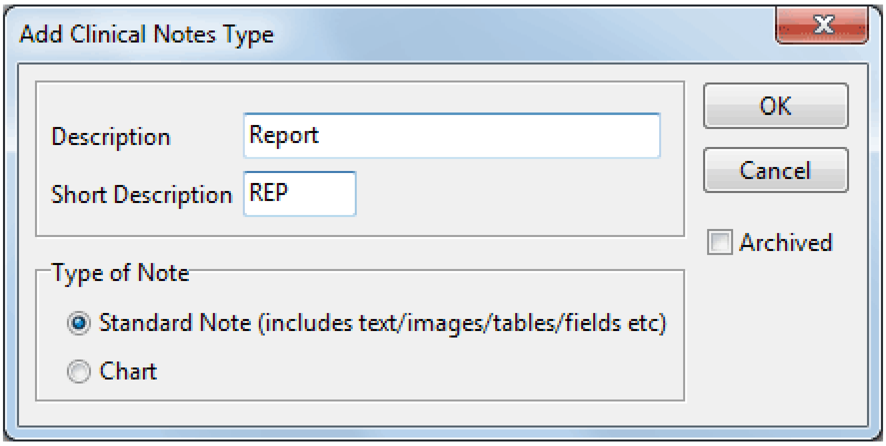
To create a new clinical notes type click **Add.**



Clinical Notes Types

The following window will appear.

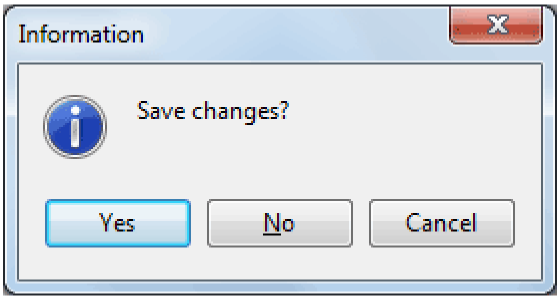
Enter the description and short description for the new clinical notes type.



Select **Standard Note** to create a standard clinical notes type, which can include text, images, tables and fields.

Select **Chart** to create a chart clinical notes type.

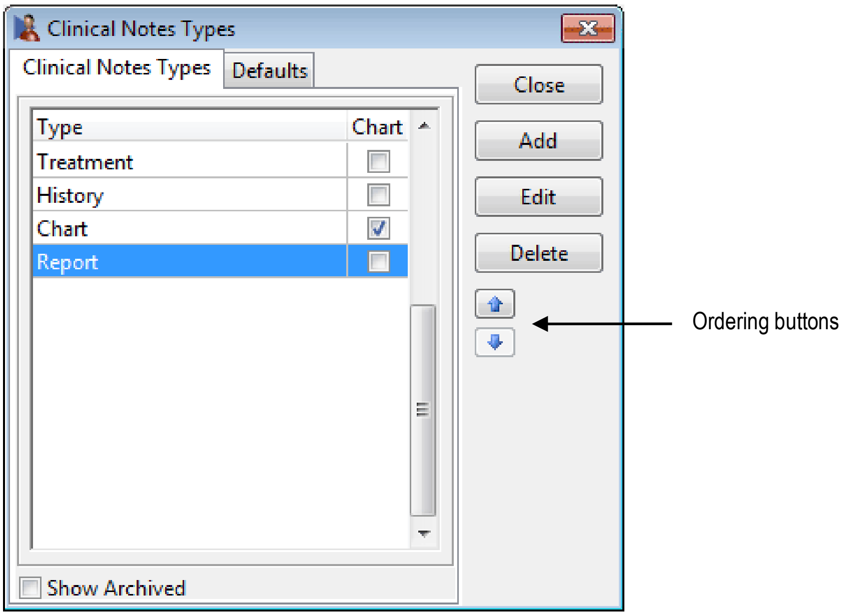
Once completed click **OK** and save when prompted.



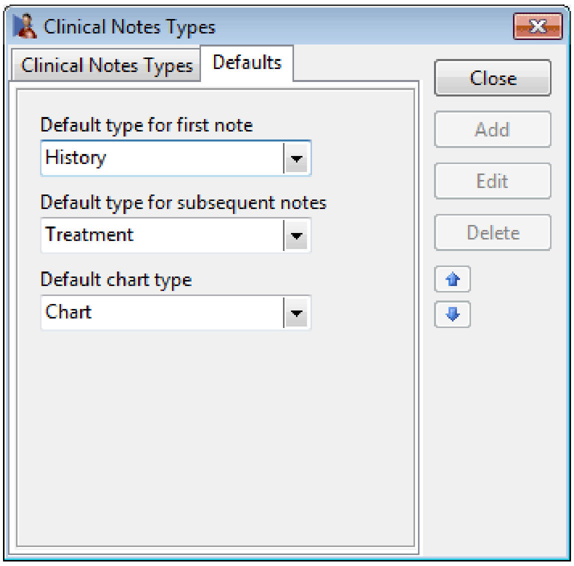
Clinical Notes Types

The newly created clinical notes type will appear in the list.

The ordering of how clinical notes types appear can be adjusted using the ordering buttons.

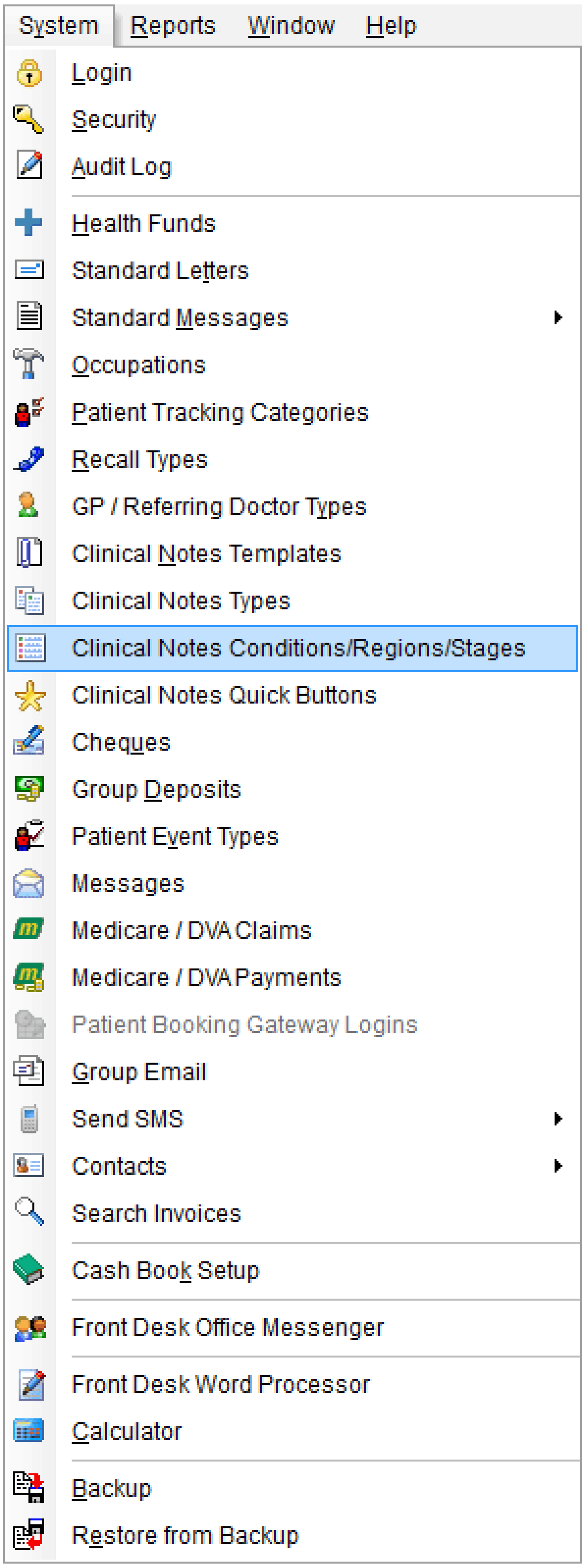


To set a default clinical notes type for the first clinical note, subsequent clinical notes and default chart types select the **Defaults** tab as below.



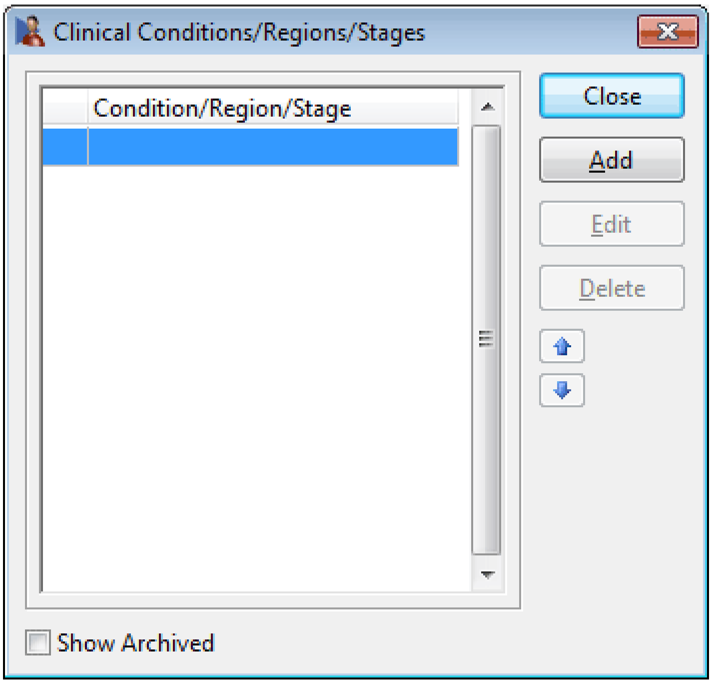
Clinical Notes Conditions / Regions / Stages

To create conditions, regions or stages for clinical notes, select **Clinical Notes Conditions/Regions/Stages** from the **System** menu.

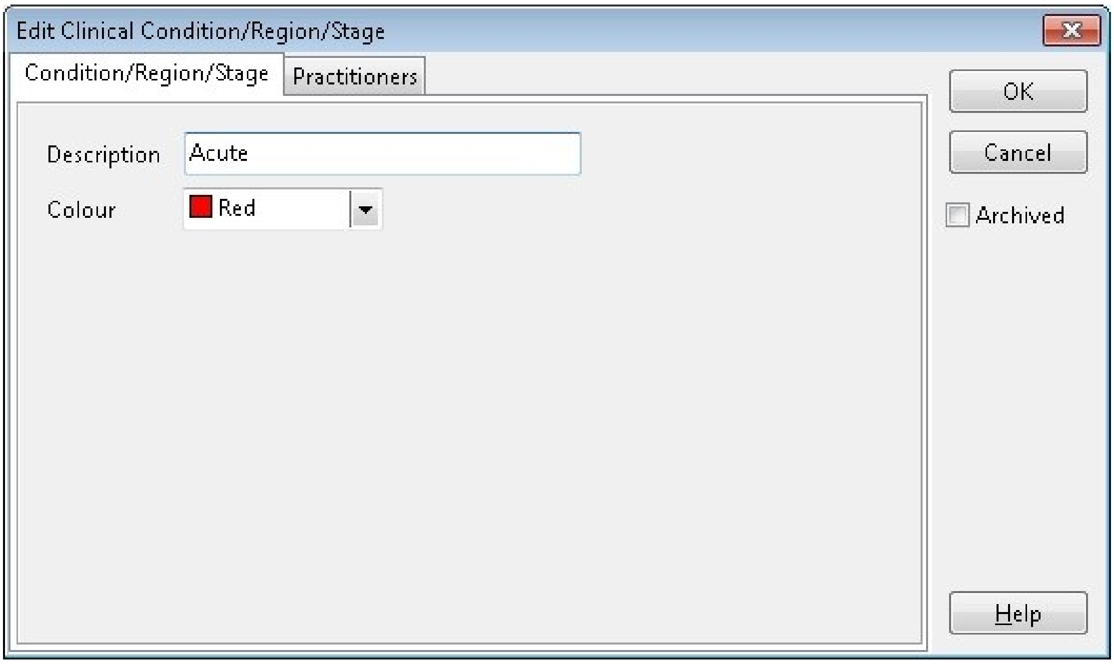


To create a new condition click **Add**.

Clinical Notes Conditions / Regions / Stages



The following window will appear.

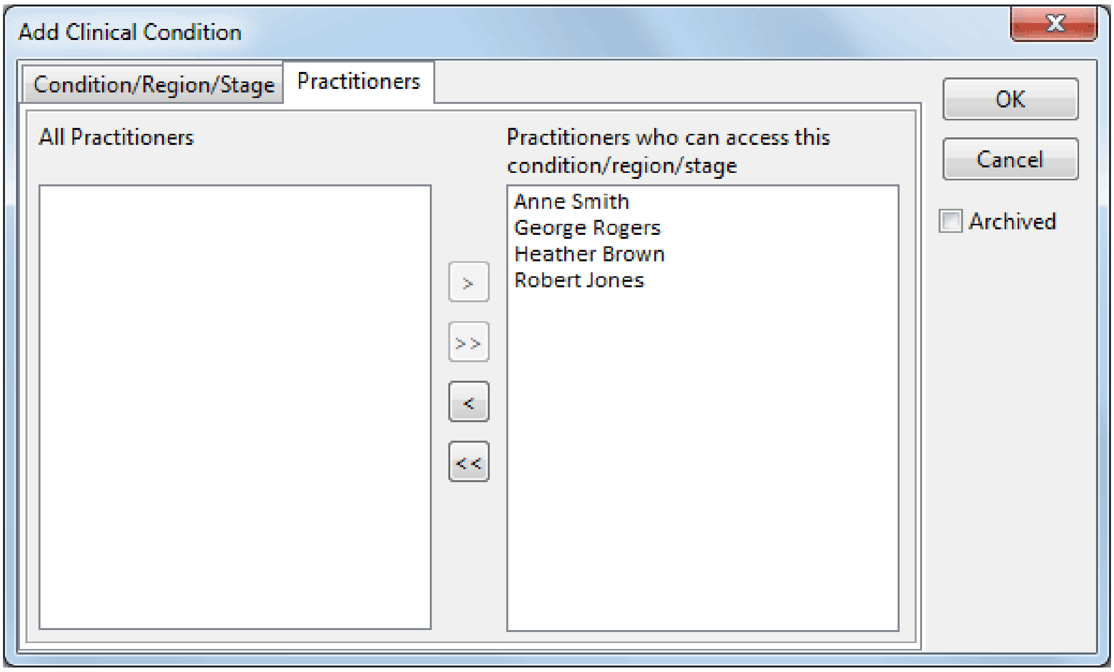


Enter a description, and select a colour to represent this condition/region/stage within clinical notes.

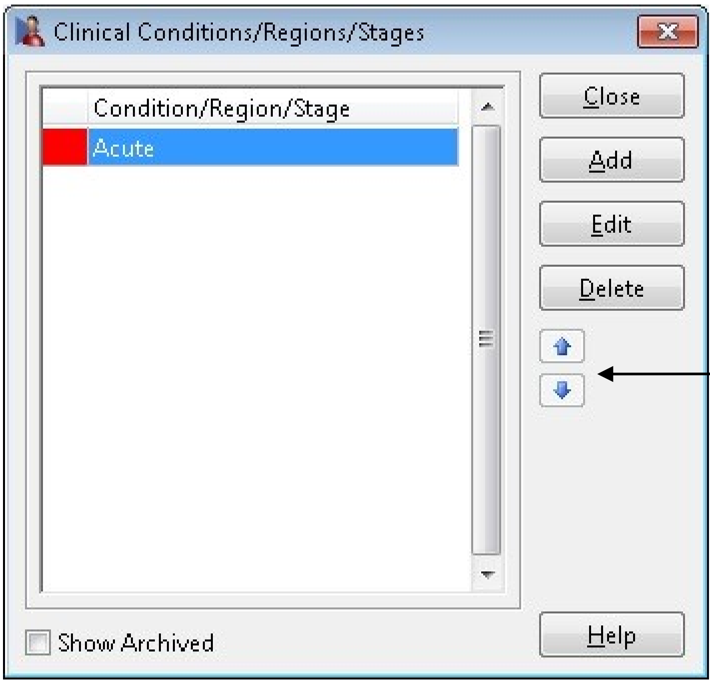
Select the **Practitioners** tab. This section enables you to set access rights for the condition. By default all practitioners have access to new conditions/regions/stages.

Moving practitioners to the left will remove their access to the condition/region/stage.

Clinical Notes Conditions / Regions / Stages



Once completed click **OK**



Ordering buttons

The newly created condition will now appear in the list.
The ordering of how conditions appear can be adjusted using the ordering buttons.

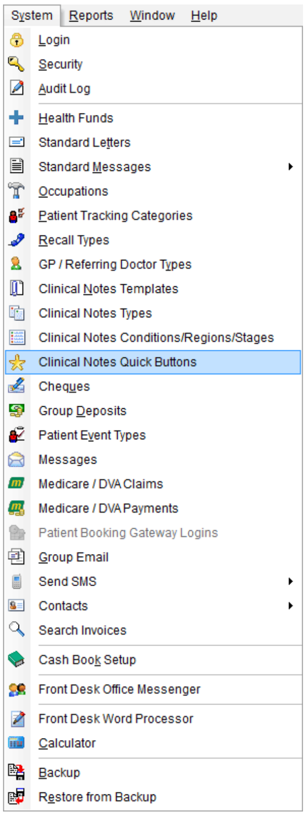
Click **Edit** to make changes to an existing clinical condition.

To remove a clinical condition click **Delete**.

Clinical Notes Quick Buttons

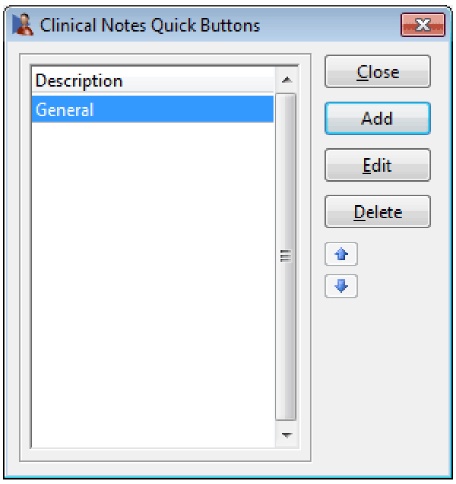
Quick buttons may be used to insert lines of custom text directly into a clinical note by clicking a pre-defined button. Button sets can be customised to include up to 10 columns of buttons.

To set up quick buttons for clinical notes, select **Clinical Notes Quick Buttons** from the **System** menu.



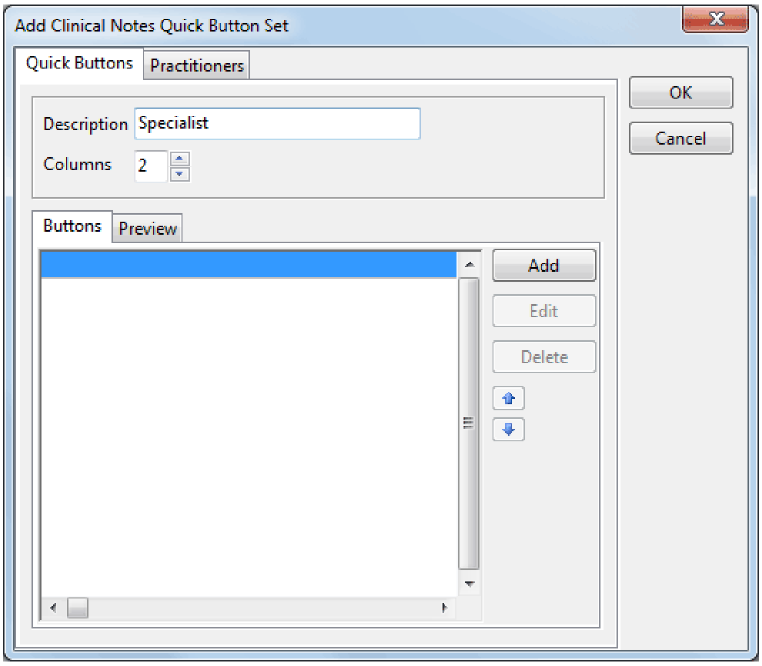
To create a new quick button set, click **Add**.

To modify an existing button set click **Edit**, or click **Delete** to remove.



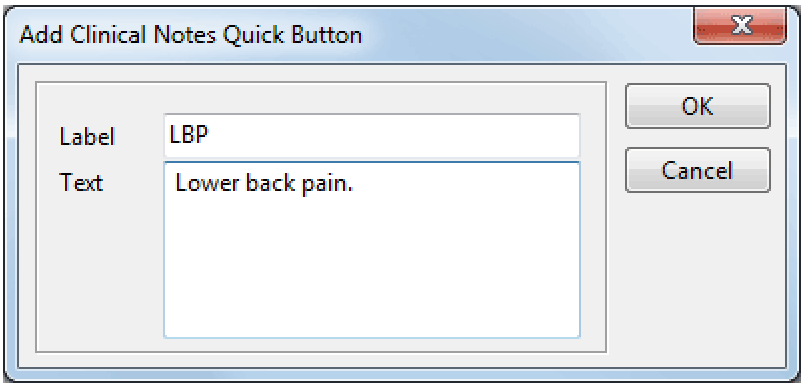
Clinical Notes Quick Buttons

The following window will appear.



Enter a description for the button set, and select the desired number of columns.

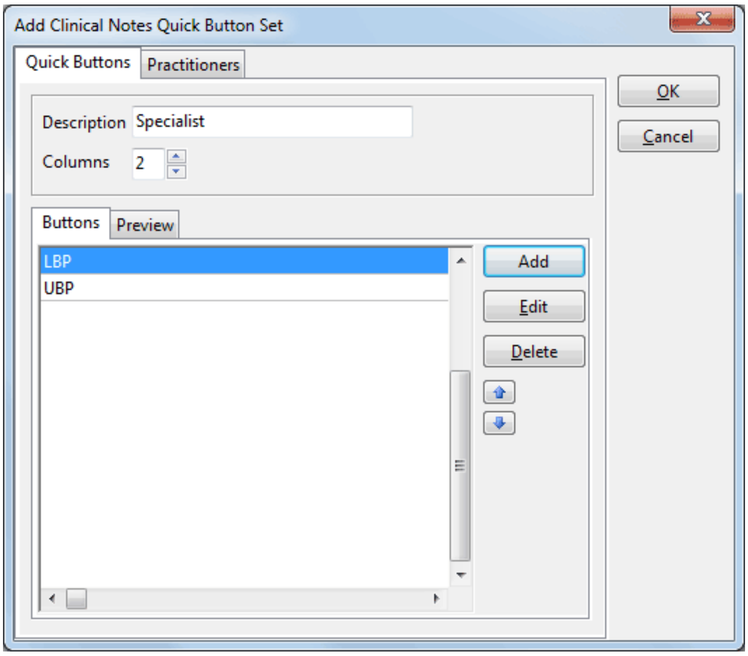
Click **Add** to create a quick button.



Enter a suitable **Label** to appear on the button, followed by the **Text** to appear when the button is pressed.

Click **OK** once complete.

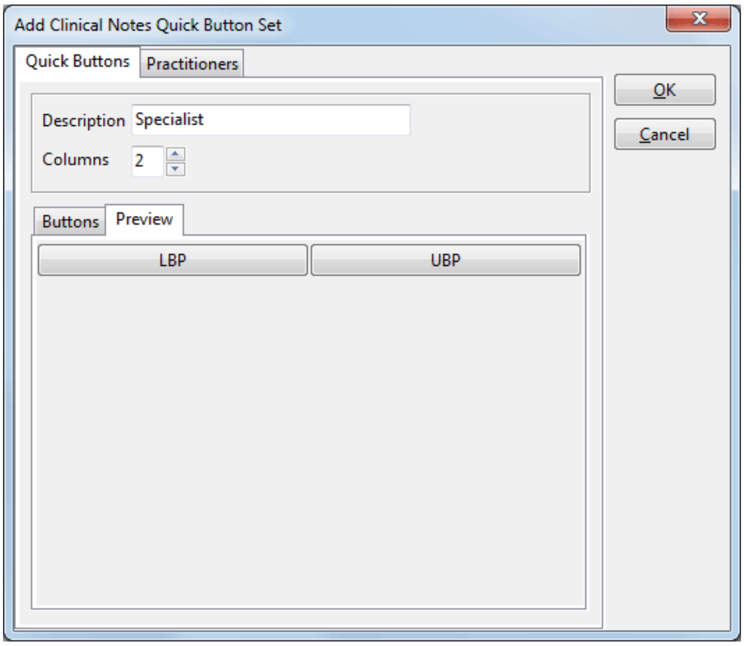
Clinical Notes Quick Buttons



Created buttons will appear in the list, and can be organised using the blue arrows.

To create additional buttons in the button set, click **Add**.
Click **Edit** to modify an existing button, or click **Delete** to remove a button.

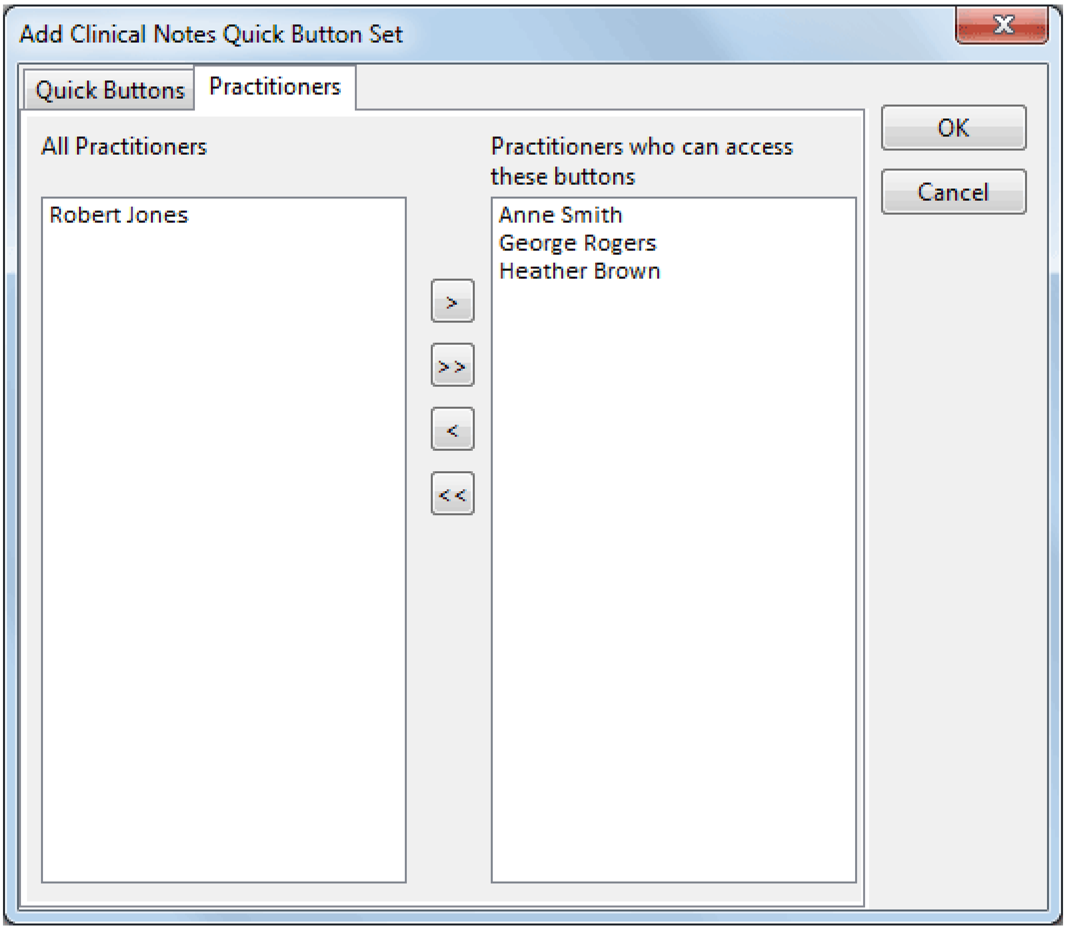
A button set can be previewed by selecting the **Preview** tab.



Clinical Notes Quick Buttons

Select the **Practitioners** tab. This section enables you to set up access rights for specific quick button sets. By default all practitioners will have access to new button sets.

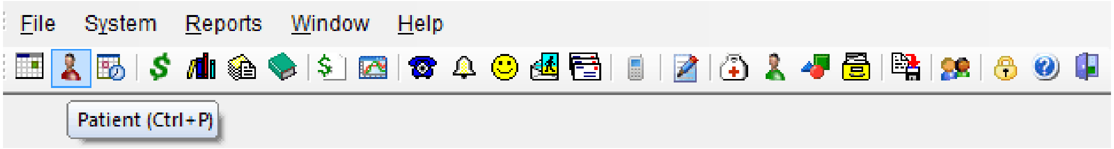
Moving practitioners to the left will remove their access to the buttons. Practitioners on the right have access to use the button set.



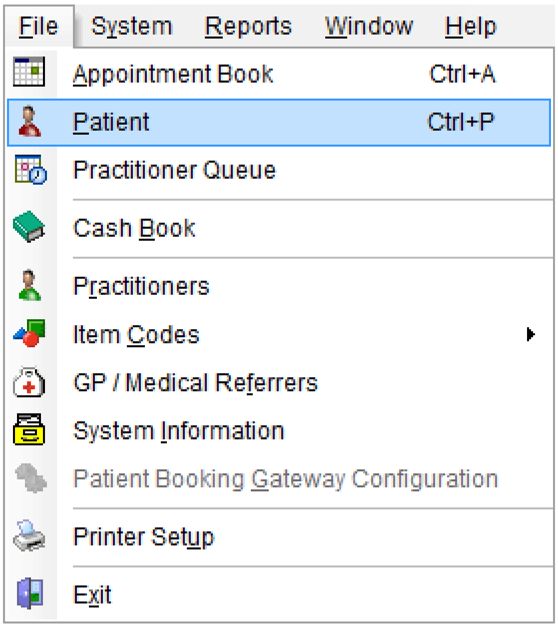
Click **OK** to complete the button set.

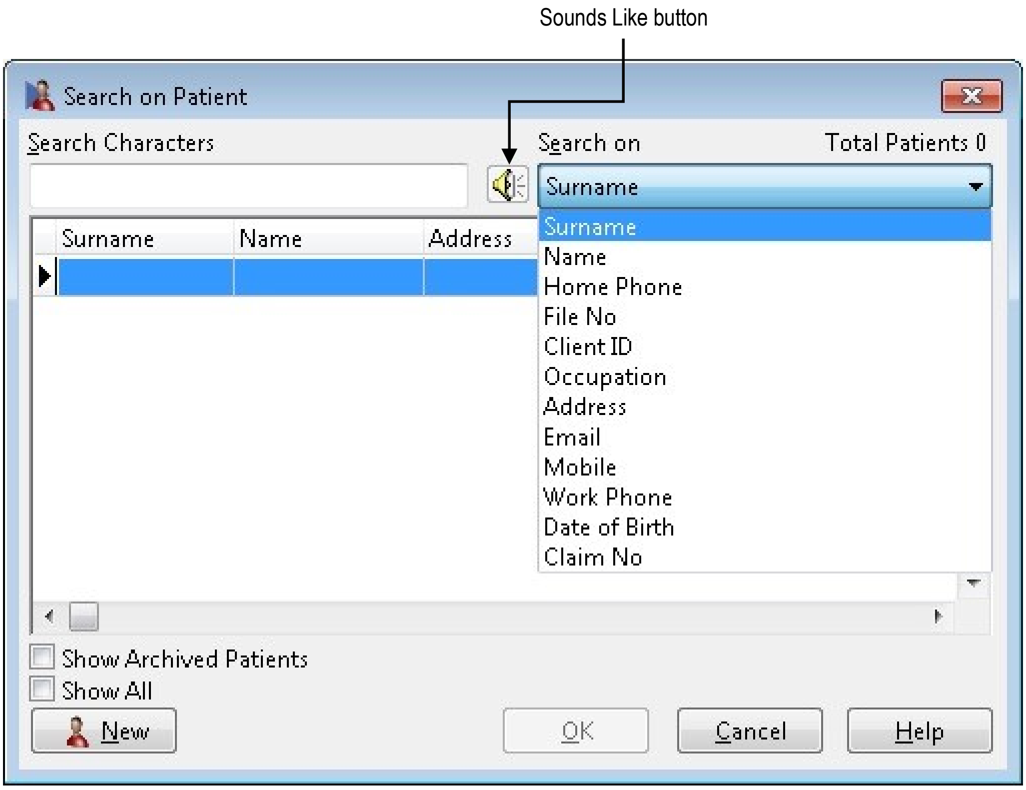
SEARCHING FOR A PATIENT

To search for a patient select the **Patient** icon from the **Toolbar**.



or from the **File** menu.





The **Search on Patient** window will be presented.

SEARCHING FOR A PATIENT

From the drop-down box select the field to **Search on**. Generally the patient's surname is used; however the following fields are also available:

- Name
- Home Phone
- File No
- Client ID
- Occupation
- Address
- Email
- Mobile
- Work Phone
- Claim No
- Date of Birth
- BPAY Ref No

Enter characters to search on in the **Search Characters** field. As you start typing, a list of the patients will be reduced to fit your search. To browse through the patients one at a time, use the up and down arrows on the keyboard or the scroll bar on the right hand side of the screen. Select the **Sounds Like** button if you are uncertain of the correct spelling of the name.

If you are searching by a patient's surname and you know the first name, you can search on both criteria by separating each item with a comma e.g. you could use ***brown,tom*** to search for **Tom Brown**.

Please note that you do not need to type the full surname e.g. ***Smi*** will display surnames starting with **Smi**, such as **Smith**. If a patient has a preferred name entered, the preferred name will be displayed in brackets after the first name. When you search on **Name**, it will search both preferred names and first names.

The ordering of the columns can be adjusted by clicking and dragging the columns as needed. The column order can be reset by right clicking on any column and selecting **Restore Column Defaults**.

If you need to search for patients who have been archived, select the **Show Archived Patients** option.

To open a patient file, highlight their name and select the **OK** button or alternatively, press **Enter** on the keyboard or double click on the patient's name.

Click the **New** button to create a new patient file.

Front Desk 2017 - Tip

Front Desk 2017 has been designed to provide more than one way to perform most common functions. Simply use the method that best suits your needs.

Receipting and Billing

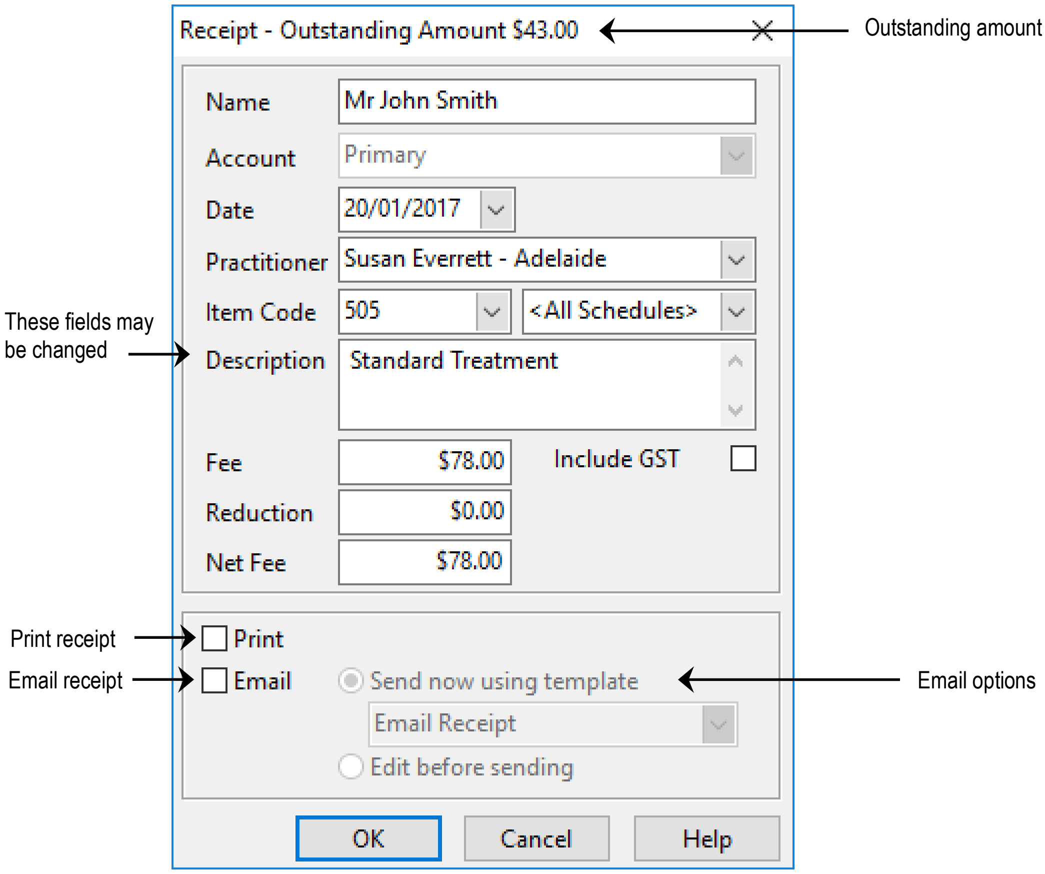
Front Desk 2017 has been designed so that users can receipt and bill patients efficiently. Receipting and billing can be performed either from the appointment book (to be covered in the Appointment Book section) or directly from the patient file.

Open a patient file and locate the **Receipt**, **Bill** and **Payment** buttons.

Receipt

A **Receipt** is used to process a payment for **one item only**, which is to be **paid in full**.

Click the **Receipt** button on the patient file.



The patient's name is displayed in the **Name** field.
The patient's account is displayed in the **Account** field.
The current date is displayed in the **Date** field and can be changed if desired. This field is the date of service.

The **Practitioner** field displays the patient's default practitioner, which is located on the **General** tab of the patient's file. To change the practitioner name, select the correct practitioner from the drop-down box.

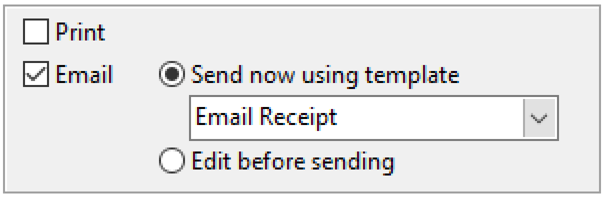
The **Item Code** and **Schedule** that are displayed are defaults associated with the practitioner and the patient's fee category. To change the schedule and/or the item code, select from the drop-down box.

If the item attracts GST select the **Include GST** option.

The amounts in the **Fee** and **Reduction** fields are derived from the item code, the patient's fee category and the GST option, these items may be overwritten manually at the time of producing a receipt.

To print the receipt, ensure that the **Print** box is ticked.

To email the receipt, ensure that the **Email** box is ticked.



When emailing a receipt, users can **Send now using template** or choose to **Edit before sending**.

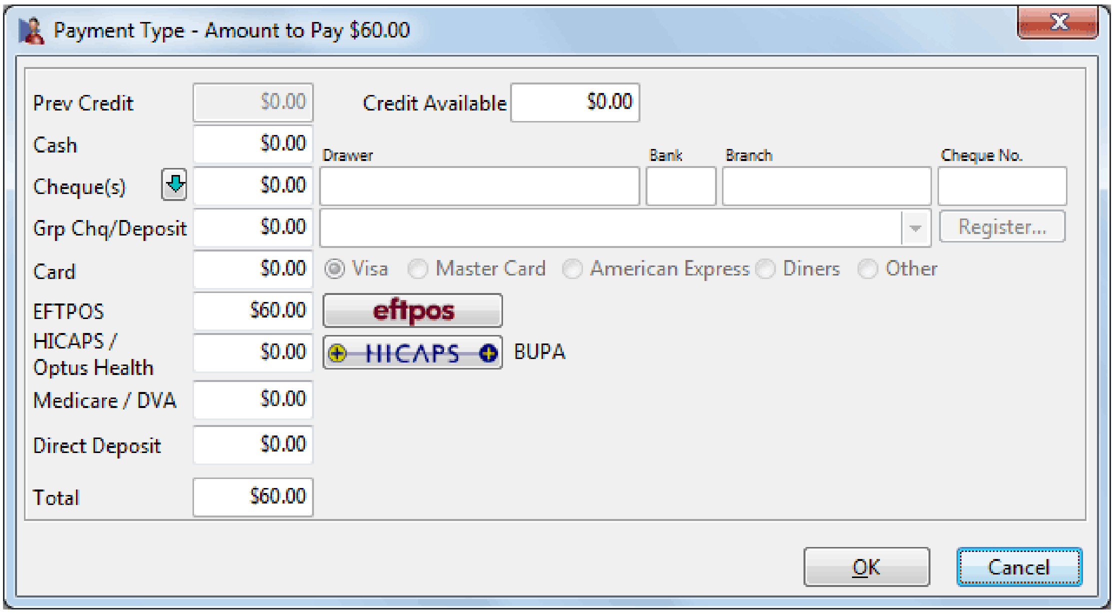
The default setting for the **Print** and **Email** options can be selected from within **System Information** under the **Defaults** tab. A default email template can also be set for under each practitioner file.

To process the receipt click the **OK** button.

Front Desk 2017 - Tip

The receipt function is for one item only, which is paid in full.

When making a payment, how the payment is being made is recording on the **Payment Type** dialog.



Enter one or more payment types in the appropriate field. Click **OK** to continue or **Cancel** to cancel.

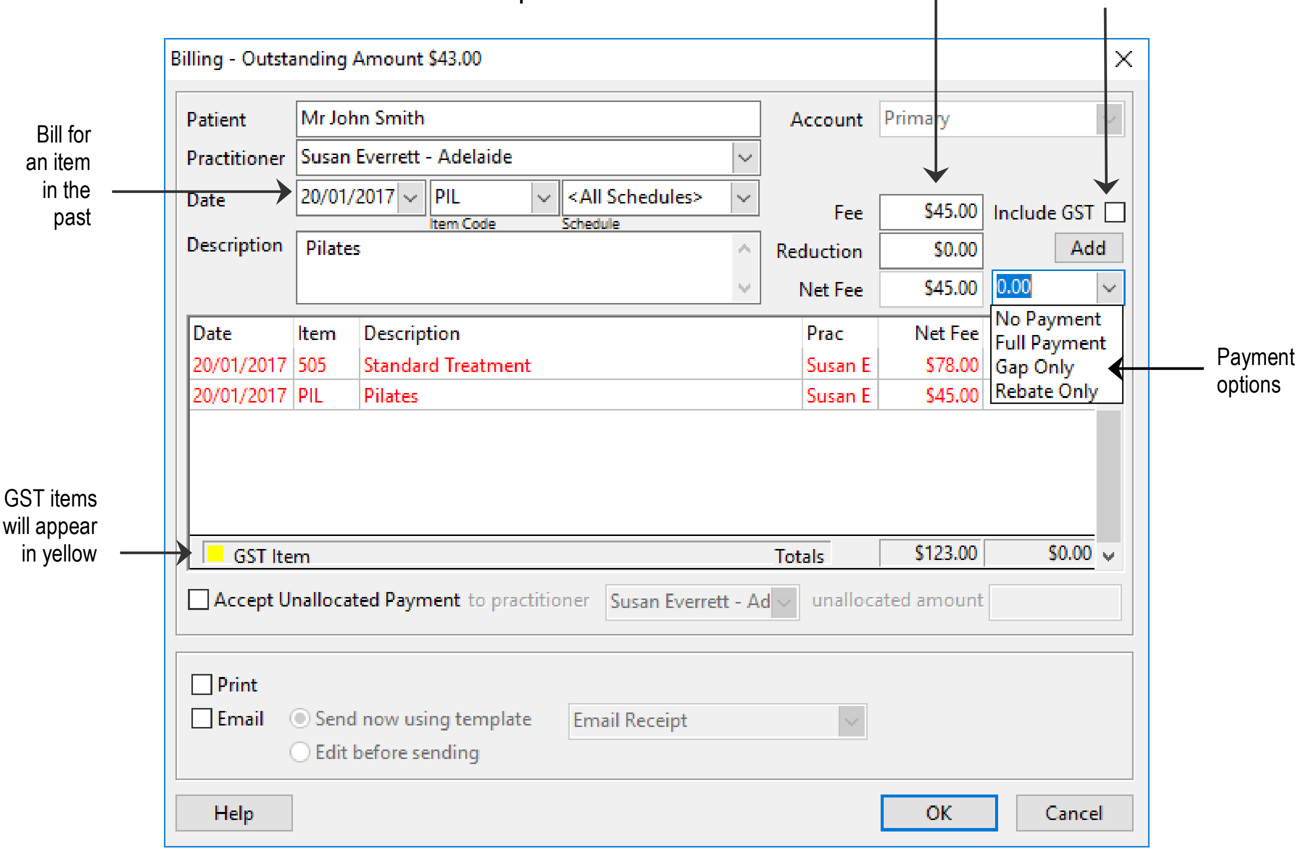
The **Payment Type** dialog will be covered in more detail in the **Payment Dissection** section of the manual.

Bill

The **Bill** function can be used to perform the following functions:

- Receipt one or more items (bill and full payment)
- Accepting a part payment for one or more items (Account/Receipt)
- Billing a patient for one or more items with no payment (Account)
- Processing transactions as above for one or more linked patients e.g. a family
- Making a payment greater than the amount being billed (transaction as above with an unallocated payment attached)
- Bill items in the future (**Advanced Option - Future Billing** must be enabled)

Click the **Bill** button on the patient file.



The **Patient** field displays the patient's name for the current transaction.

Note that if this patient is a third-party biller with associated linked patients, the linked patient names may be selected using the patient drop-down box.

The **Practitioner** field displays the practitioner providing the service. To change the practitioner you can simply start typing the name of the practitioner or use the drop-down box and select a practitioner.

The service **Date** is set to the current date by default, but can be changed, as required, to reflect a different date of service.

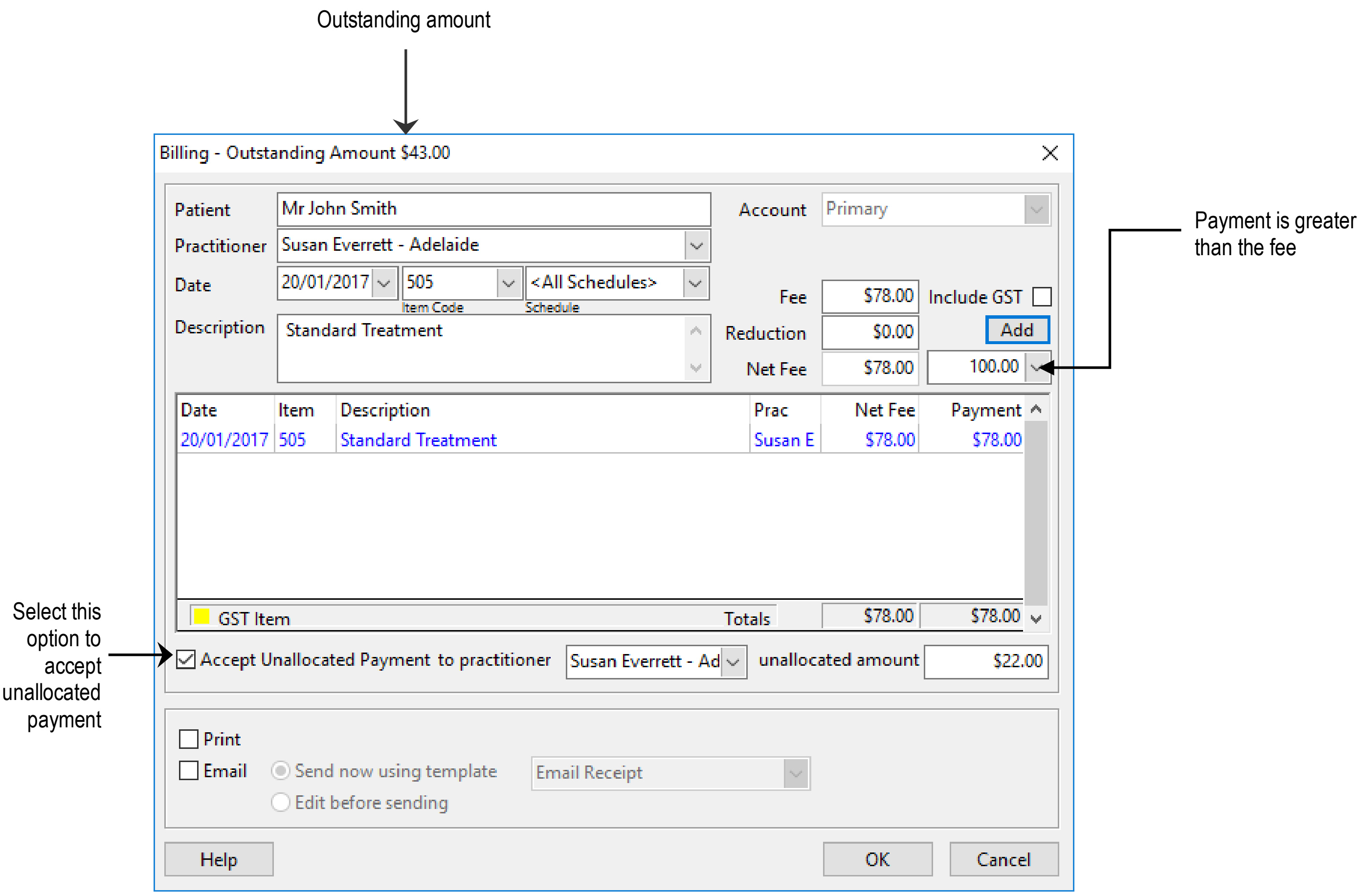
The **Item Code** field displays the default item code associated with the selected practitioner and the patient's fee category. The **Description** field describes the item code and may be edited. Select a different item code from the drop-down box if required.

If the item attracts GST, the **Include GST** option will be checked on selection of that item. You may override this if required.

The **Net Fee** and **Payment** fields display the amount being billed and the amount being paid respectively. The Fee, Reduction and Payment amounts may be edited.

Click the **Add** button when the information regarding the service is correct. The item will appear in the transaction grid below. To remove a transaction from the grid, double click on that transaction.

To accept a payment that is greater than the amount being billed check the **Accept Unallocated Payment** option and select the practitioner you wish the credit amount to apply to.



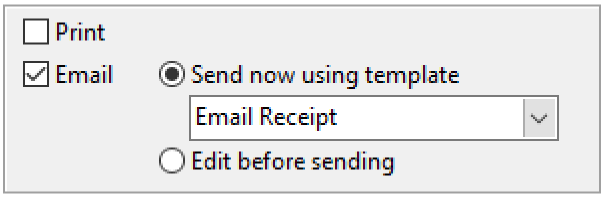
Front Desk 2017 - Note

An unallocated payment is an amount paid on an account which is not allocated to a billed item. This amount can be viewed as a credit on a patient's account.

To bill another service, set the fields as described above and click the **Add** button. There is no limit to the number of items that can be added at one time.

To print the transaction, ensure the **Print** box is ticked.

To email the transaction, ensure that the **Email** box is ticked.



When emailing a transaction, users can **Send now using template** or choose to **Edit before sending**.

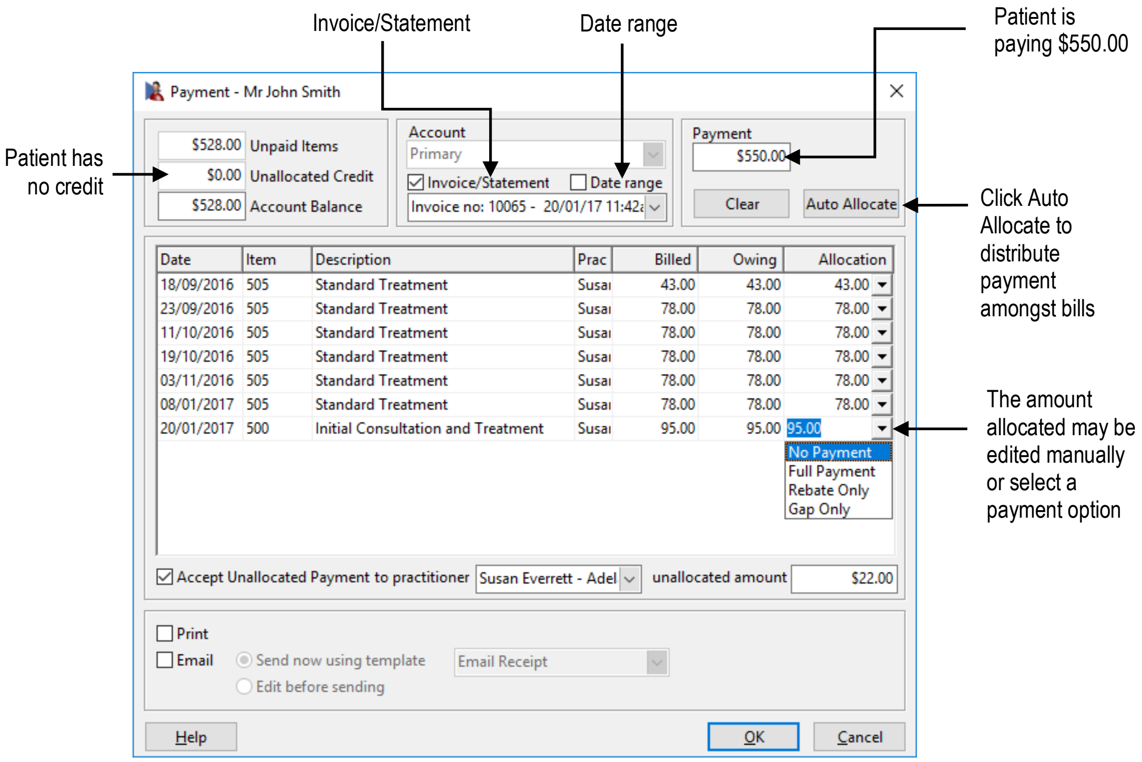
To process the items within the transaction grid click the **OK** button or **Cancel** to end.

The **Payment Type** dialog will then appear to record how a payment was made.

If you are using the billing option mainly to bill items without payments and you would like the **Payment** amount to be set to a zero amount by default when billing select fee categories, uncheck the **Pay on Billing** option on the **Fee Categories** tab in **System Information**.

PAYMENTS

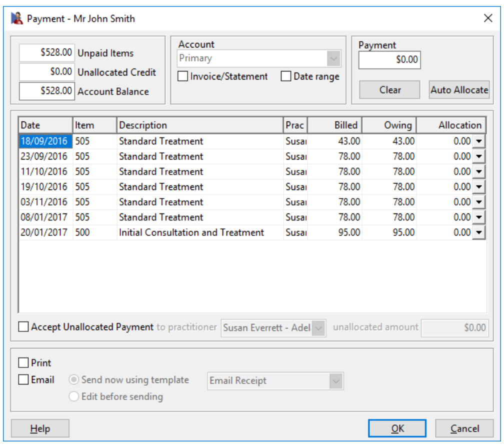
Click the **Payment** button on the patient file.



To make a payment for a specific statement or invoice, select the **Invoice/Statement** option. This option enables you to view the outstanding amounts that were printed on a specific statement or invoice. This option is only available if a statement or invoice has been previously printed for this patient.

This view can be ordered by date range by clicking the **Date** column header or ordered by name by clicking the **Name** column header (for linked patients only).

Double-clicking the item description will auto-allocate any remaining payment to that item. Double-clicking again will remove the allocated payment.



If the **Invoice/Statement** or the **Date Range** option is not selected than the payment screen will show **ALL** the outstanding amounts for that patient.

PAYMENTS

The top left-hand corner of the payment screen displays the patient's account status, which includes the total of **Unpaid Items**, **Unallocated Credits** and **Account Balance**.

Unpaid Items are the total of all outstanding items. **Unallocated Credits** indicates the total credit available for payment of outstanding transactions. **Account Balance** is the total amount outstanding.

Enter the amount being paid into the **Payment** field.

If the items to be paid are the only items or the oldest outstanding items, click the **Auto Allocate** button. The amount to be paid is distributed amongst the outstanding items (and recorded in the **Allocation** column), the oldest being paid first.

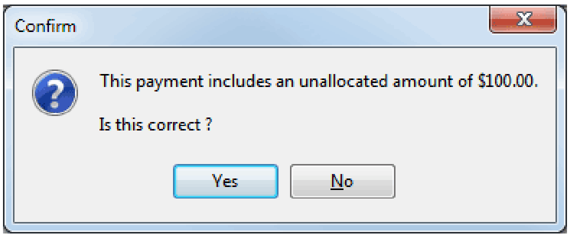
To distribute the amount manually, select the **Allocation** column of the item to be paid and enter the amount. To clear the amounts in the allocation column, click the **Clear Allocated** button.

If the amount being paid is greater than the amount allocated, then the remaining amount may be credited to the patient's account. Select the **Accept Unallocated Payment** option.

To print the payment receipt, select **Print**. To email an electronic copy of the payment receipt select **Email**.

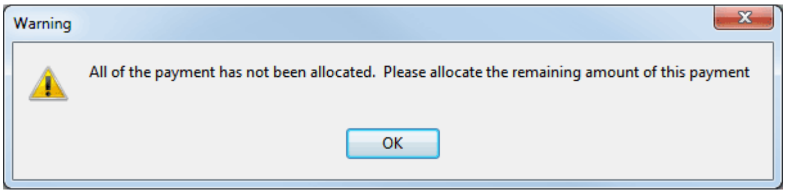
To process the payment click the **OK** button or **Cancel** to cancel this operation.

If the amount being paid exceeds the amount owing and the **Accept Unallocated Payment** option is selected, the following **Confirmation** dialog will appear.



Click **Yes** to proceed.

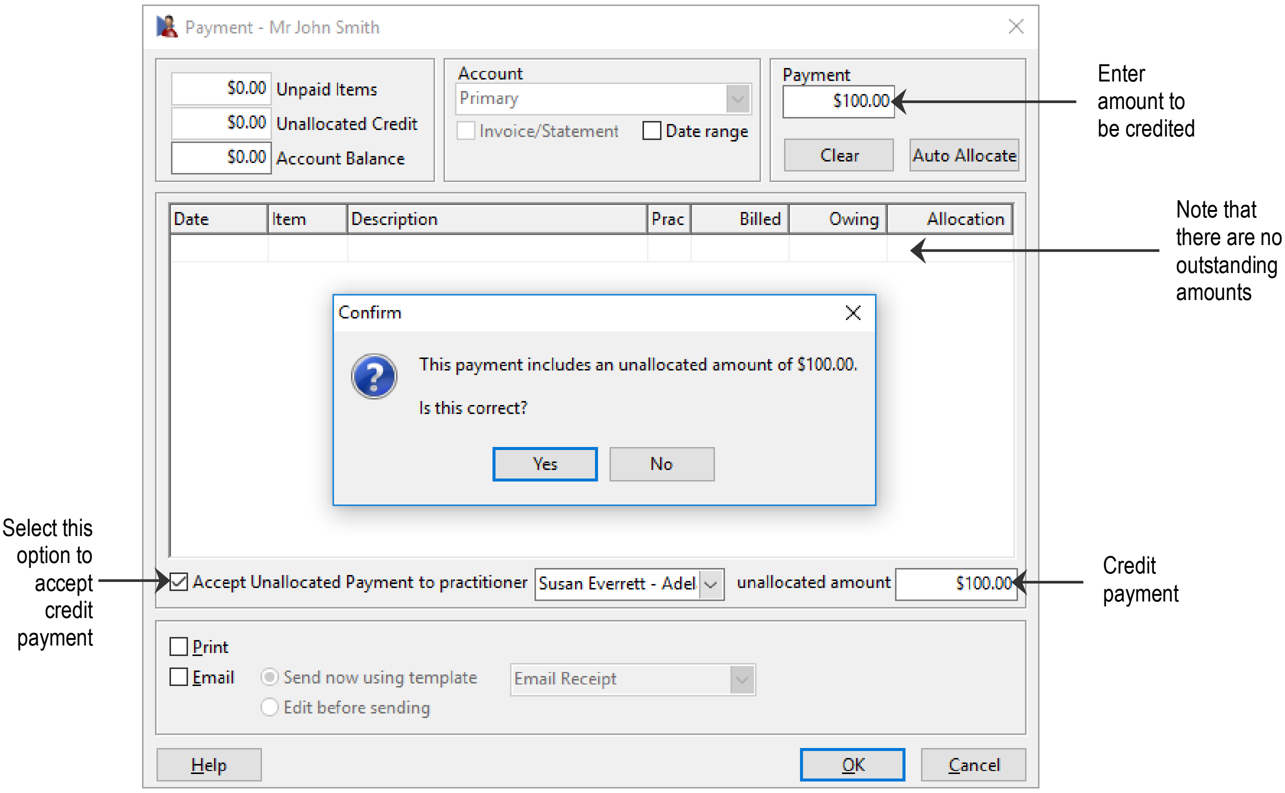
If the payment being made is greater than the total outstanding amounts or has not been allocated to outstanding accounts, the following **Warning** dialog will appear.



To resolve this either select the **Accept Unallocated Payment** option to indicate that an unallocated amount is also being accepted, change the **Payment** amount, or select the **Auto Allocate** button to allocate any remaining amounts.

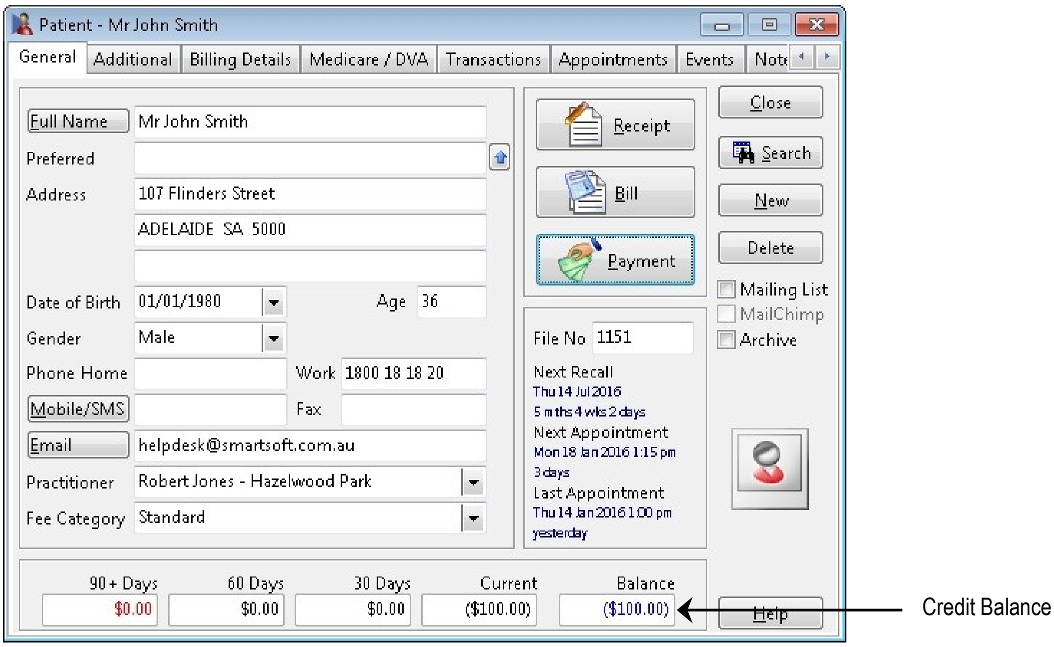
Payments

To allocate a credit to a patient's account when there are **no outstanding amounts**, enter the amount to be credited into the **Payment** field, select the **Accept Unallocated Payment** option and then click **OK**.



If the **Use Banking Sheets** option in **System Information** has been selected the **Payment Type** dialog will appear. Enter the amount to be paid in the correct payment type and click **OK** or press **Enter** on the keyboard.

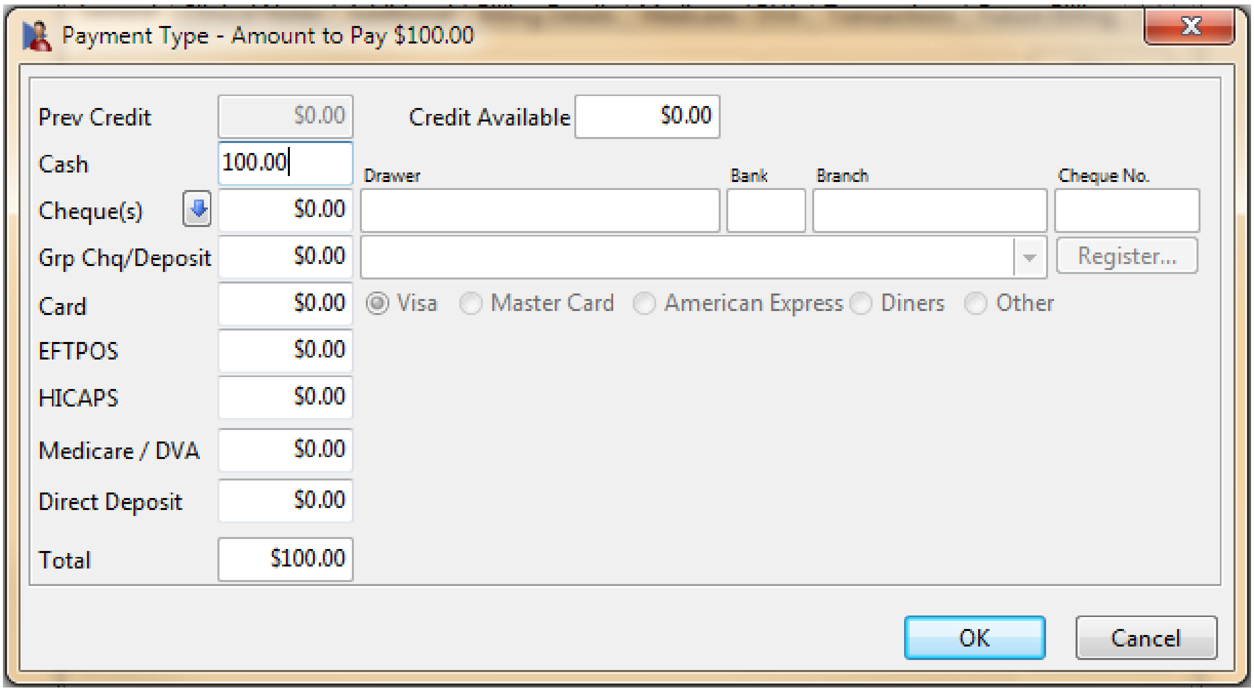
The patient's balance will now appear in blue within brackets, indicating a credit amount, as shown below.



Payment Dissection

The **Payment Type** dialog enables the method of payment to be specified. This is necessary for the generation of shift reports and banking sheets.

If the **Use Banking Sheets** option has been selected in **System Information**, the **Payment Type** dialog will appear when processing all payments.



Enter the amount to be paid into the corresponding payment field. If the patient is in credit the payment type will default to the **Prev Credit** field.

When printing **Receipts** and **Payments** the payment type will be printed to show how the account was paid.

You can use the tab key on your keyboard to move through the payment type fields.

For a cheque payment, the **Drawer**, **Bank** and **Branch** details need to be provided. The **Cheque No** is optional.

Payments may consist of several payment types (e.g. $20 cash and $20 credit card). The **Total** of the payment types must equal that of the payment being made.

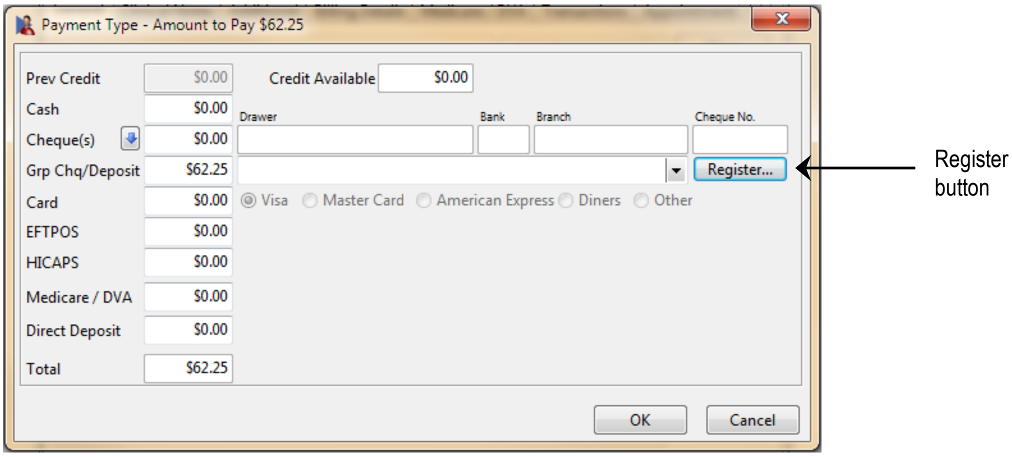
PAYMENT DISSECTION

Group Cheques/Deposits

A *Group Cheque* or *Group Deposit* is a single payment used to pay amounts on more than one patient account.

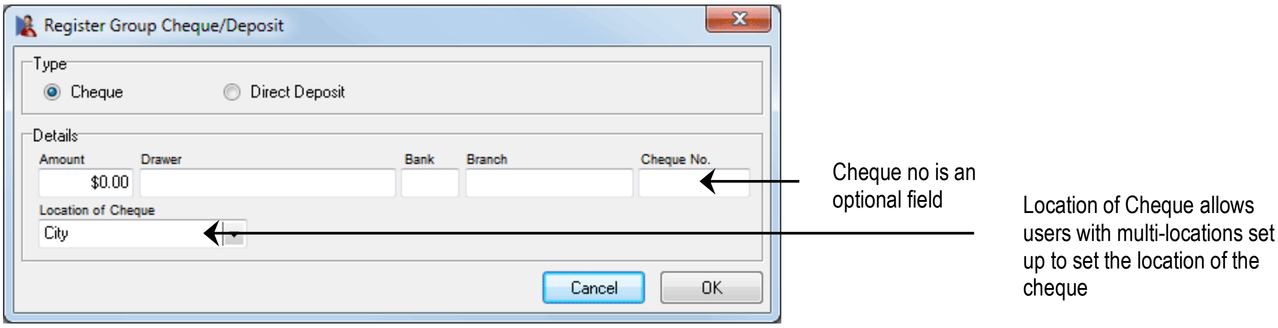
When making a group payment, *Front Desk 2017* requires you to **Register** the cheque or deposit. This facility keeps track of multiple group payments and the remaining unused balance of each payment.

Locate the **Group Cheque/Deposit** box on the left and enter the amount to be paid on this account only, either select a group cheque/deposit which has already been entered, but not completely used, or register a new group cheque/deposit by clicking the **Register** button.

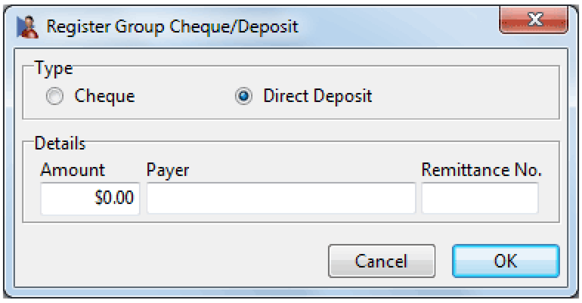


When registering a group payment, enter the full amount of the payment in the **Amount** field and complete the details of the cheque or deposit as shown below.

Register Group Cheque



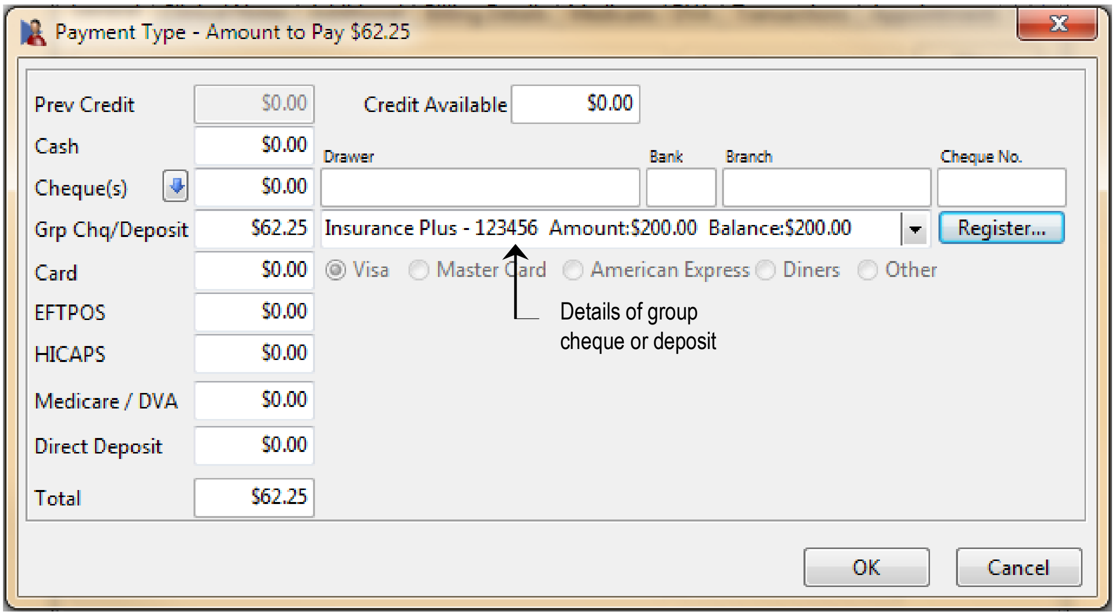
Register Group Deposit



Click **OK** to complete the registration process.

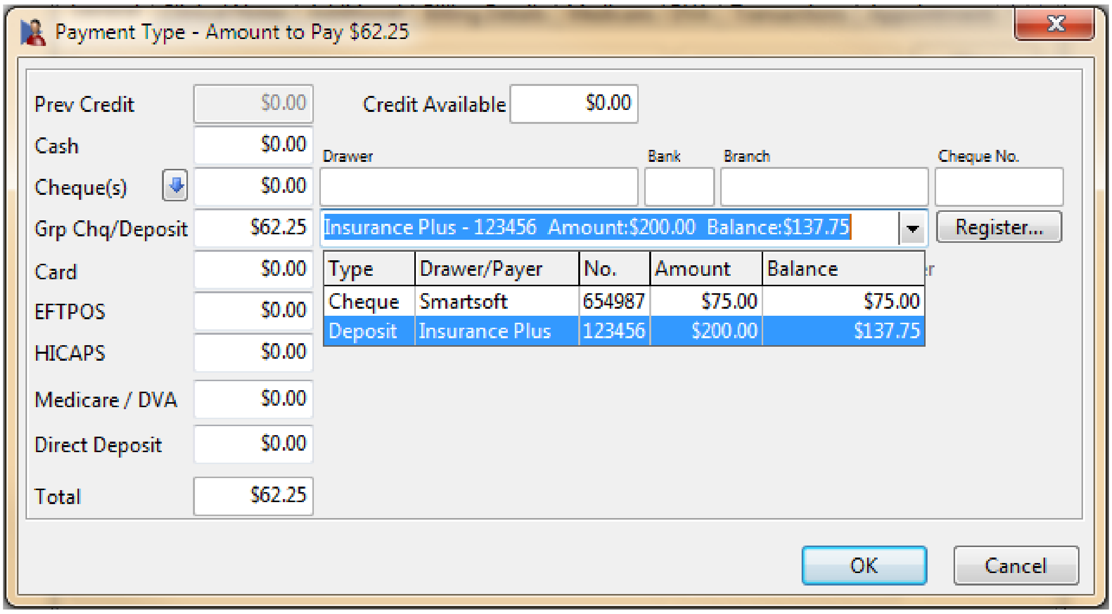
PAYMENT DISSECTION

Once you have completed the registration of the **Group Cheque** or **Deposit** your payment type screen should look similar to the screen below. If you have several group payments registered, you will be able to use the drop-down box to select which cheque or deposit to use for particular payments.



Click **OK** to complete the payment.

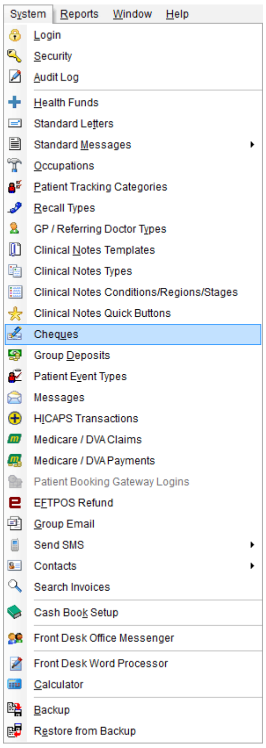
Search for the next patient whose account needs to be paid by group cheque or deposit. From the payment type screen select the registered cheque or deposit which is required to pay for this amount, as shown below.



PAYMENT DISSECTION

Cheques

To edit a cheque or delete payments made by group cheques select **Cheques** from the **System** menu.



The **Cheques** screen will display all cheques that have been entered within a specified date range. By default only incomplete group cheques are shown. Uncheck the **Show Incomplete Group Cheques Only** option to display all cheques.

You can view the transactions associated with each cheque by clicking on the plus (**+**), located to the left of each cheque.

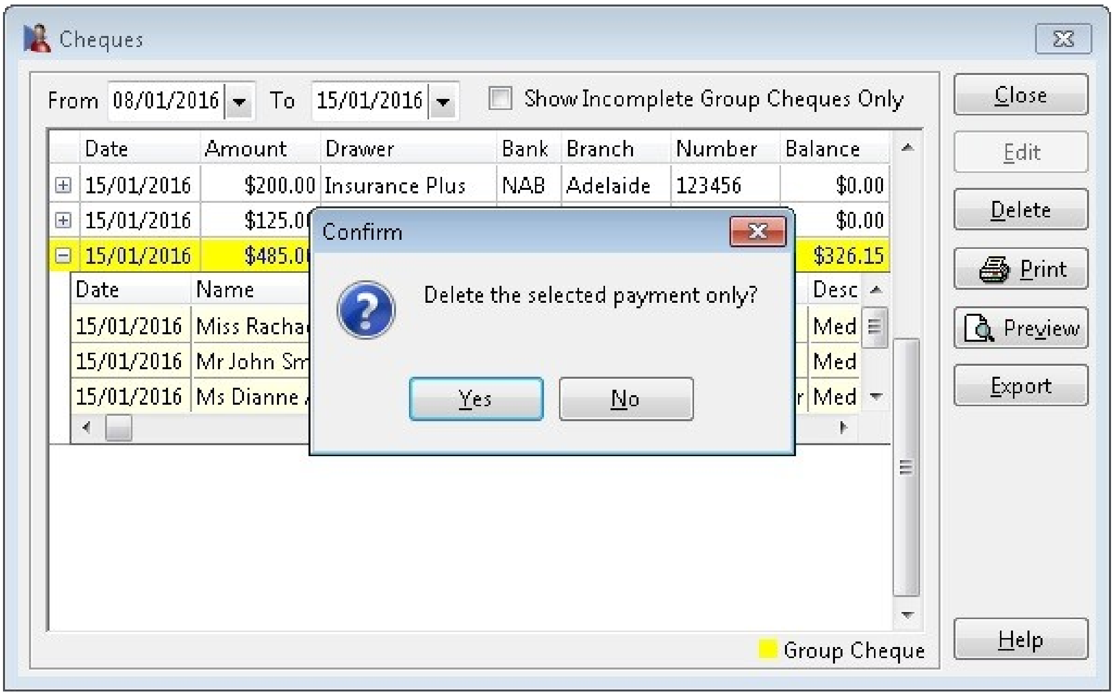
Cheques may be deleted or edited from this screen. Simply highlight the cheque and click the **Edit** or **Delete** buttons.

PAYMENT DISSECTION

Cheques

To delete a cheque and all payments made by a cheque, select the cheque then click the **Delete** button. To delete just one particular transaction from the **Cheques** screen, click on the plus (**+**) sign next to the cheque, select the transaction you wish to remove and click the **Delete** button.

Note that once a group cheque is deleted any payments that were associated with that cheque will also be deleted from the patient's file.



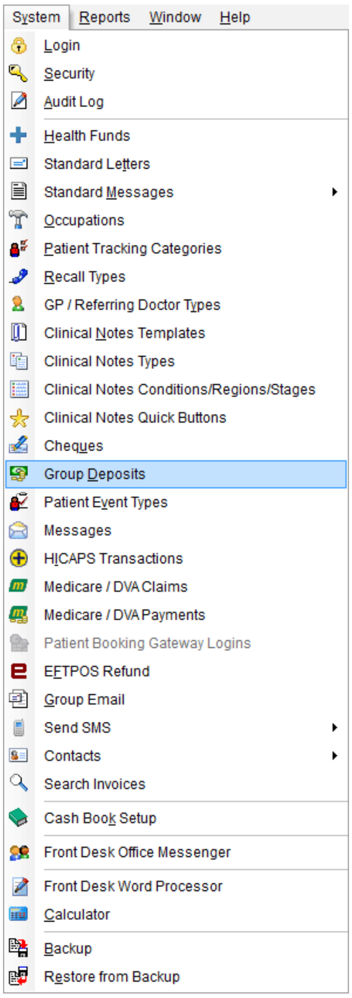
Click **Preview** or **Print** to generate a **Group Cheque Report**.

Click the **Export** button to generate a CSV or a Microsoft Excel® spreadsheet with the cheque details.

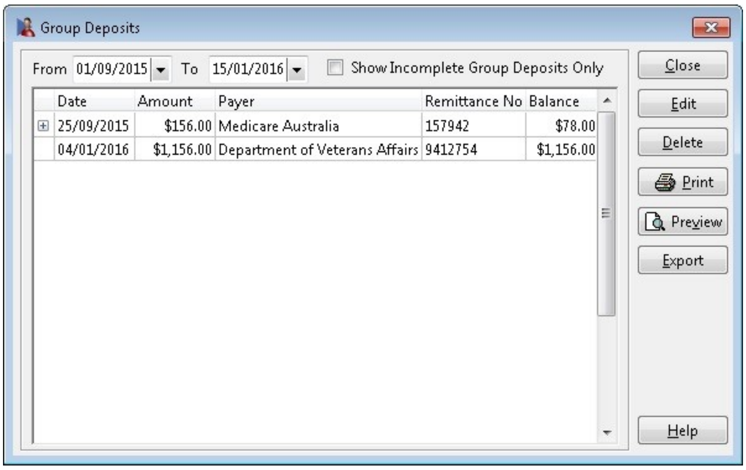
Payment Dissection

Group Deposit

To view details regarding group deposits select **Group Deposits** from the **System** menu.

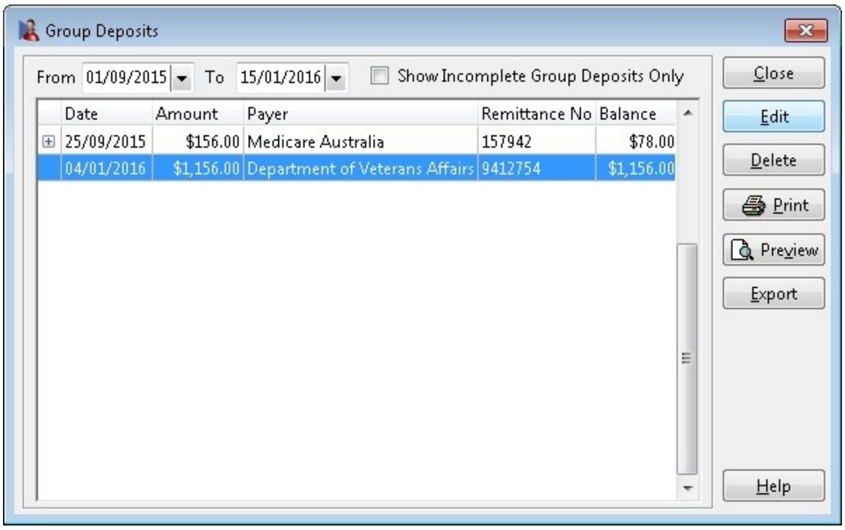


A list of **Group Deposits** between two dates will appear.

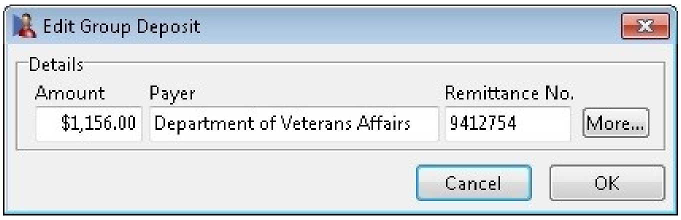


To view the transactions made by a particular deposit, click the plus (**+**) to the left-hand side of the deposit. A drop-down box will appear with the transaction details.

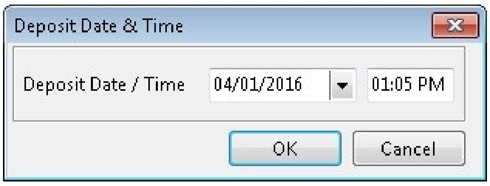
Group Deposit



To edit the amount of the group deposit, highlight the deposit and click **Edit**.

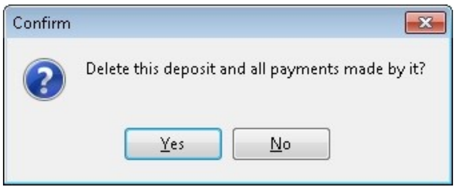


As notifications of payments made into your bank account are received some time after the actual deposit, you can edit the payment date of the transactions associated with this group deposit by clicking the **More…** button and setting a new deposit date and time.



To remove a group deposit, highlight the particular deposit and click **Delete**.

Note that once a group deposit is deleted any payments that were associated with that deposit will be deleted from the patients' accounts.

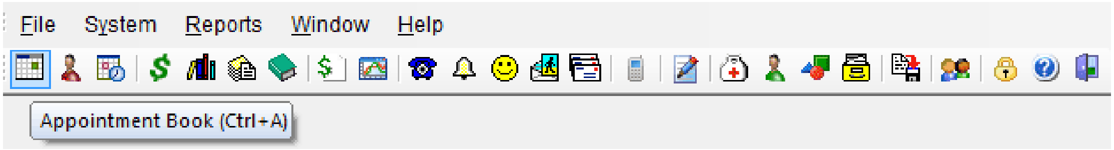


Click **Preview** or **Print** to generate a **Group Deposit Report**.

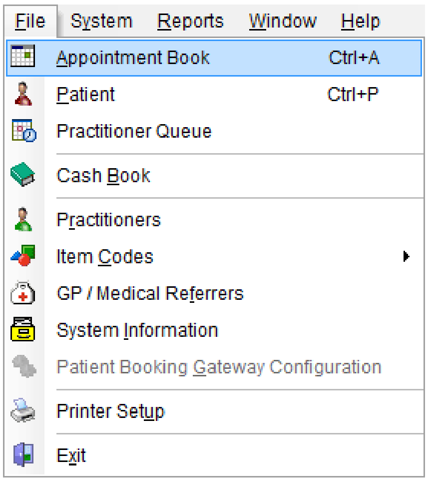
Click the **Export** button to generate a CSV or a Microsoft Excel® spreadsheet with the Group Deposit details.

Working with the Appointment Book

To open the appointment book select the **Appointment Book** icon from the **Toolbar**



or from the **File** menu.



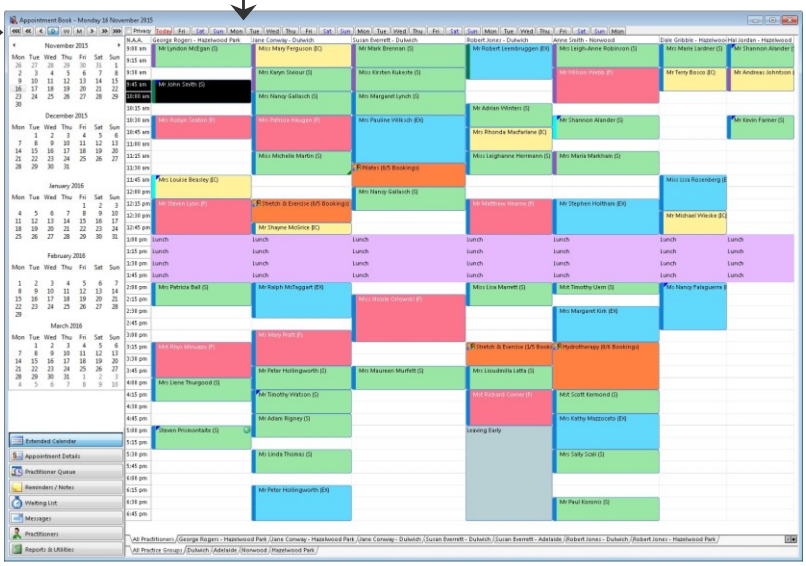
The **Appointment Book** window will appear. The day being viewed in the appointment book is displayed in the Appointment Book title bar and also in the calendar. By default the Appointment Book will open to the current day.

To view a particular day in the Appointment Book either select that day from the **calendar** or click a **day button** found above the practitioner columns. To navigate to the previous/next week or previous/next month, use the double or triple arrows accordingly.

Day View

Day Buttons

Appointment book navigation buttons including Day, Week & Monthly Appointment book views

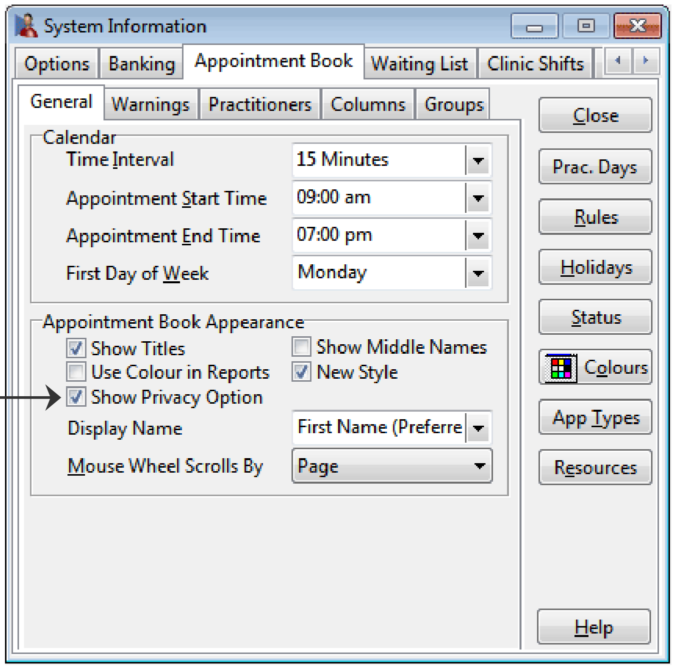


Appointment Book

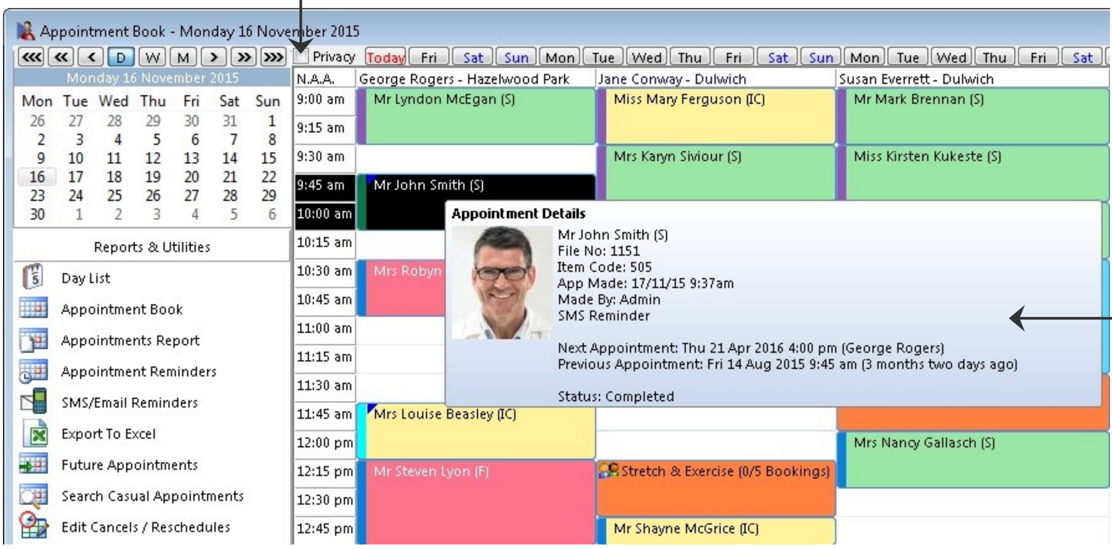
Working with the Appointment Book

The *Front Desk 2017* Appointment Book has a privacy option that allows users to hide patient names in the Appointment Book. The Privacy setting can be enabled on the **Appointment Book** tab in **System Information**.

Show Privacy Option in the Appointment Book

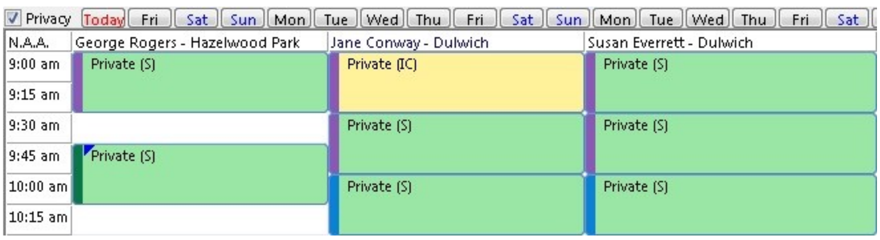


Privacy option. **Alt + P** on the keyboard will also toggle the **Privacy** option



The Appointment tool tip will show the patient details

When the **Privacy** option is enabled, appointments will appear without patient information and instead appear with the Private descriptor.



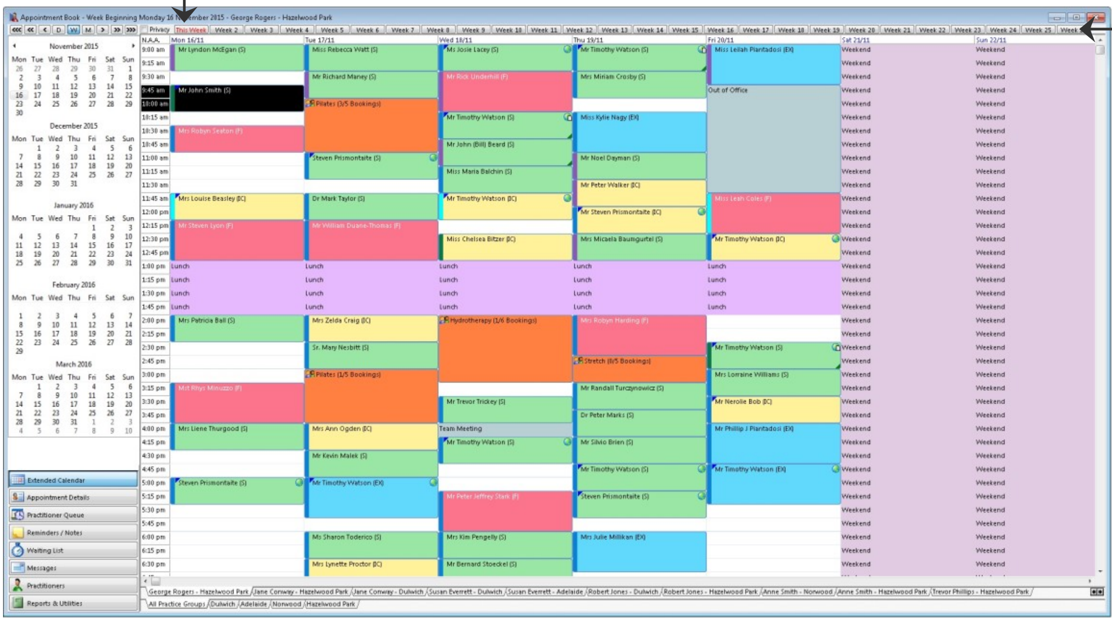
Working with the Appointment Book

Week View

For the appointment book to appear in weekly view, click the **Week** button above the calendar.

To view appointment statistics for a week, place the mouse pointer over **This Week** or the required week you wish to view.

This Week button



Week buttons

Front Desk 2017 - Note

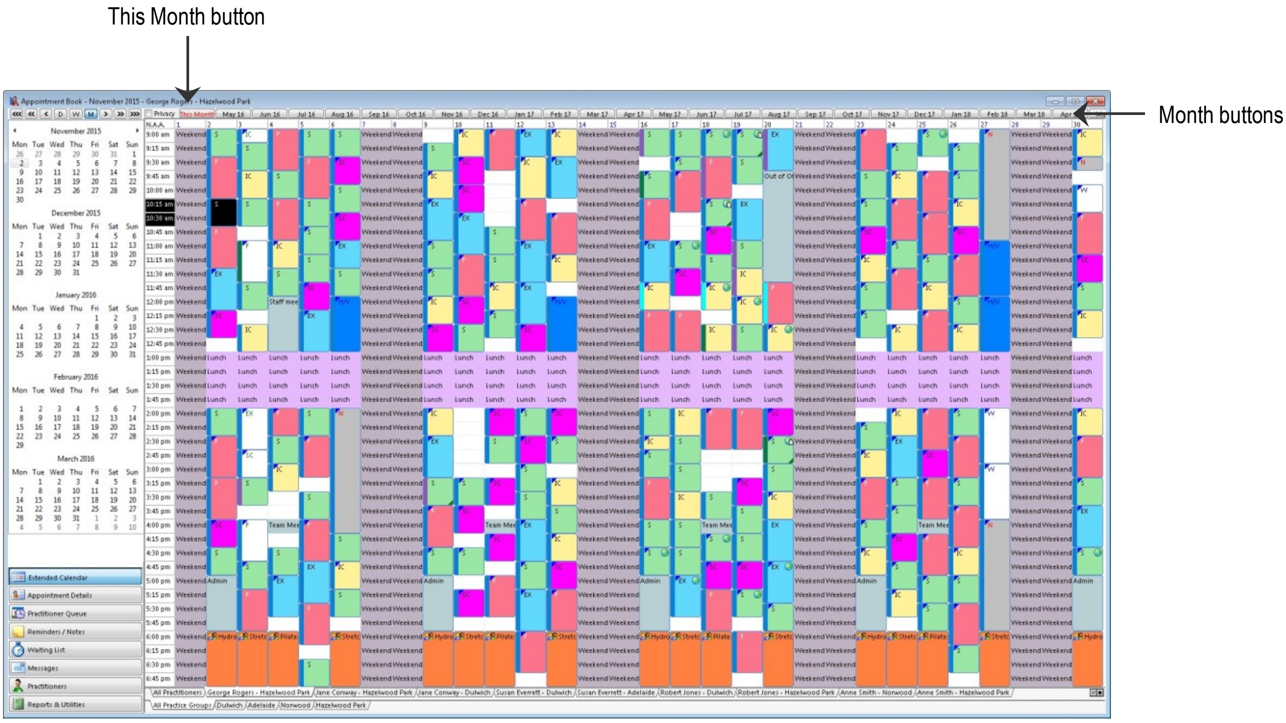
The Appointment Book will only show one practitioner column at a time when viewing the Appointment Book by week or month.

Working with the Appointment Book

Month View

For the appointment book to appear in monthly view, click the **Month** button above the calendar.

To view the appointment statistics for a month, place the mouse pointer over **This Month** or the required week you wish to view.



When viewing the Appointment Book by month, the **Appointment Types** will appear instead of the patient names. Hold the mouse cursor over an appointment to view the patient's name and appointment details.

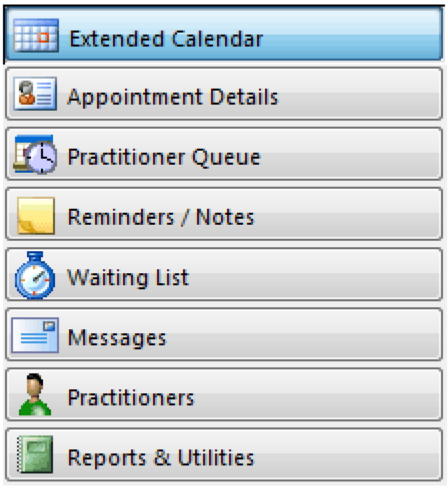
Double click the **N.A.A (next available appointment)** button on the appointment book to find the **N**ext **A**vailable **A**ppointment time slot within a practitioner column. The **N.A.A** button will only place appointments as per the Appointment Rules for the practitioner.

To view only the columns for a particular practitioner or practice group, select the relevant tab at the bottom of the appointment book. To view all practitioner columns select the **All Practitioners** tab. To resize the columns select the dividing line between column headers with the left mouse button, hold and move horizontally. The appointment book columns are defined under the **Appointment Book** tab in **System Information**.

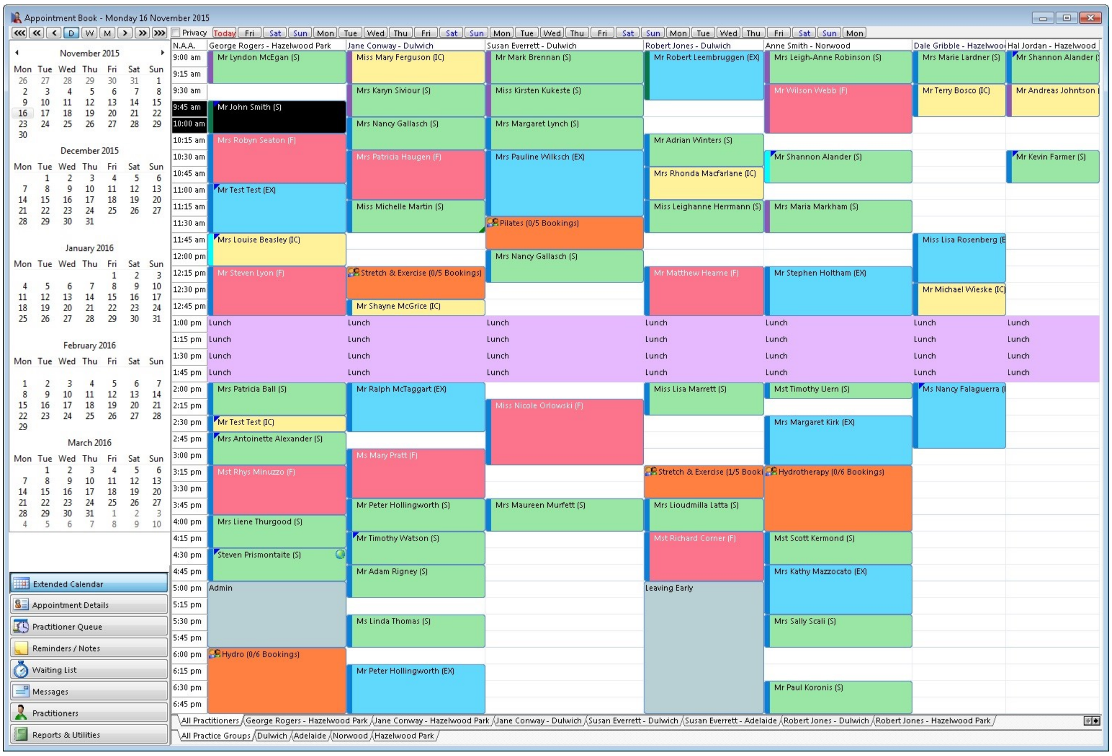
Appointment Book

Working with the Appointment Book

The Appointment Book has an Outlook-style tool bar on the bottom left of the screen. Appointment Book functions and reports can be accessed by clicking these buttons.

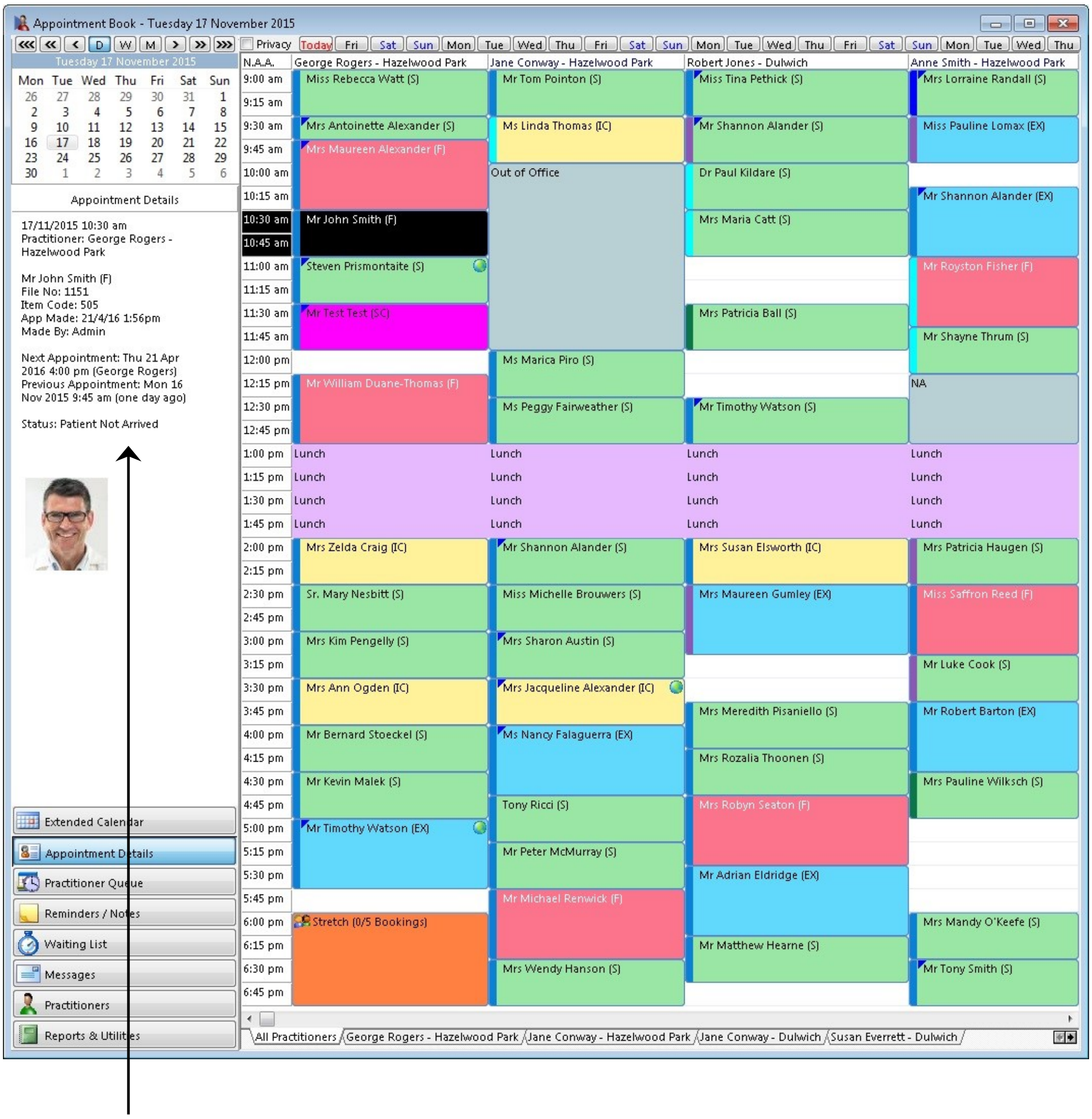


The **Extended Calendar** displays multiple calendar months for easy future appointment bookings. The actual number of months displayed is dependent on your computer screen resolution, with most users able to view three months.



Working with the Appointment Book

Appointment Details will show the details of a selected appointment including the appointment status, patient waiting time in the practice and a patient photo when available. This functionality is valuable for quickly checking the details of an appointment and identifying patients in the waiting room.

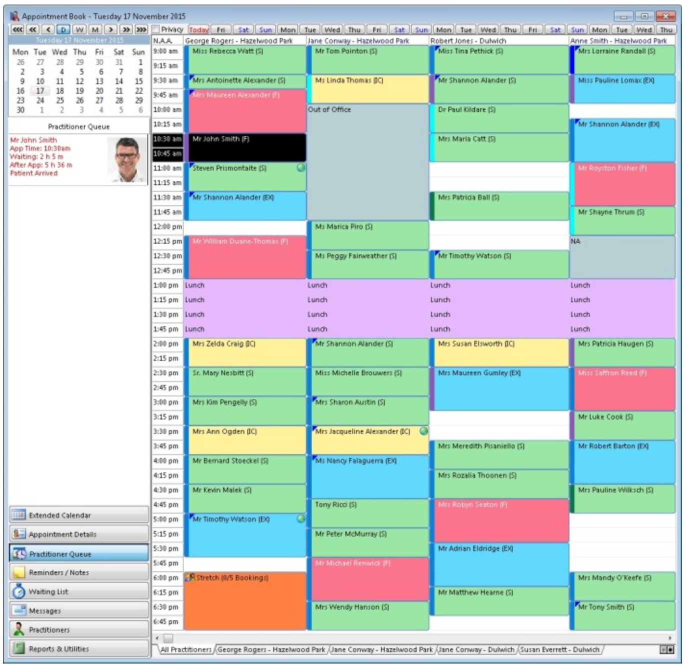


The Appointment Details will be displayed including the patient's Account Balance, Future Appointments, Waiting time and Waiting time after appointment is scheduled to start

Note that for the **Waiting** time to appear the patient's appointment status must be set to **Patient Arrived**.

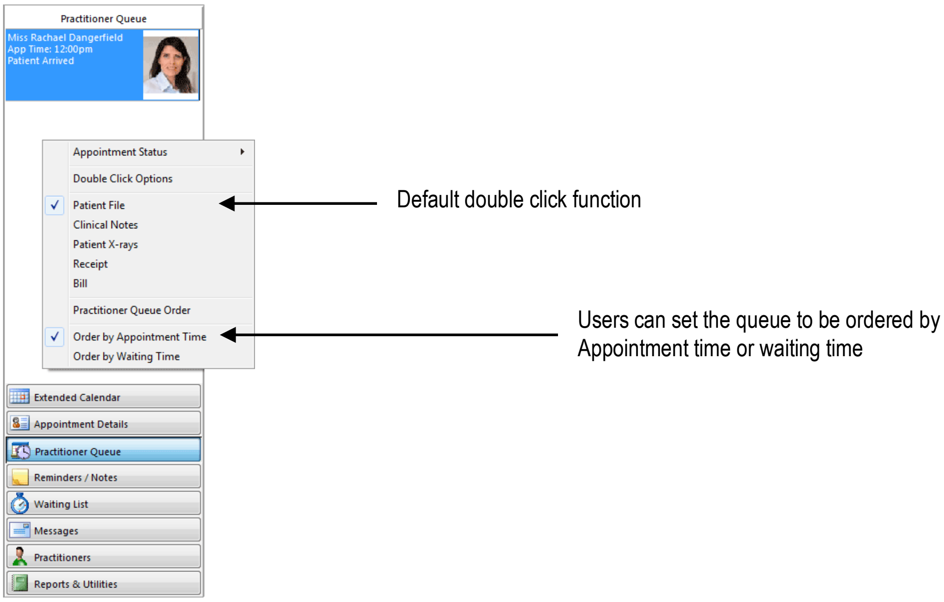
Working with the Appointment Book

The **Practitioner Queue** is used to show the patients who have arrived and are waiting to be seen by a particular practitioner, including how long they have been waiting. The queue can be ordered by appointment time or by patient waiting time.



The **Practitioner Queue** has also been designed to allow users to do some of the most commonly performed actions on the selected patient. These include opening the patient's file, accessing clinical notes, adding/viewing x-rays, receipting and billing.

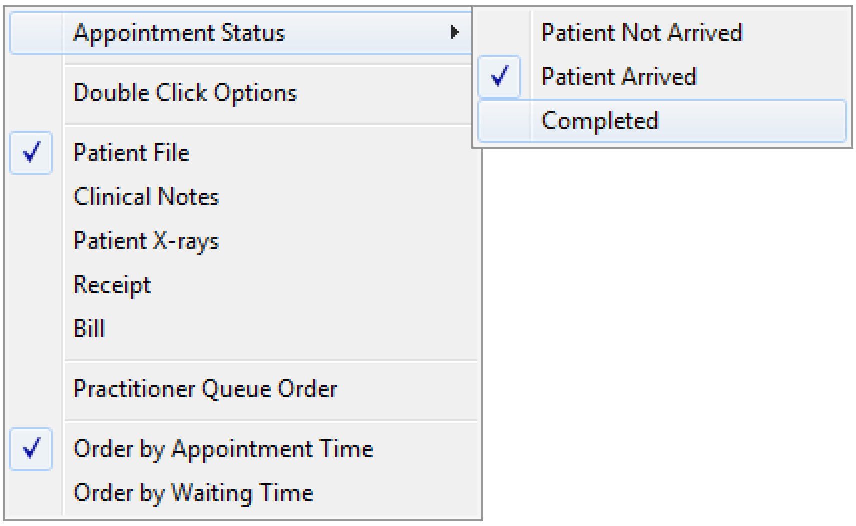
The default action when double clicking on a patient can be changed by right clicking within the **Practitioner Queue**.



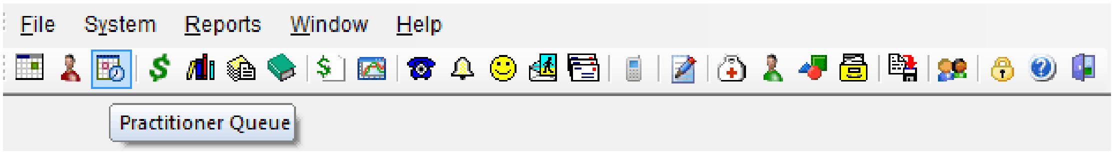
Appointment Book

Working with the Appointment Book

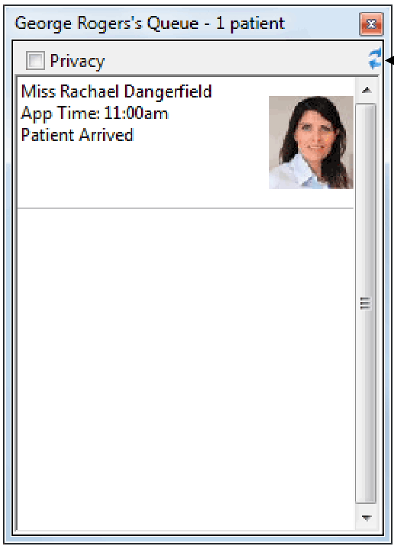
The **Appointment Status** can be changed from within the Practitioner Queue by right clicking the patient and selecting an Appointment Status.



The **Practitioner Queue** can also be opened independently of the Appointment Book from the *Front Desk 2017* **Toolbar**.



This floating window may be positioned anywhere on the screen, and can also be docked to either the left or right of the Front Desk 2017 window.



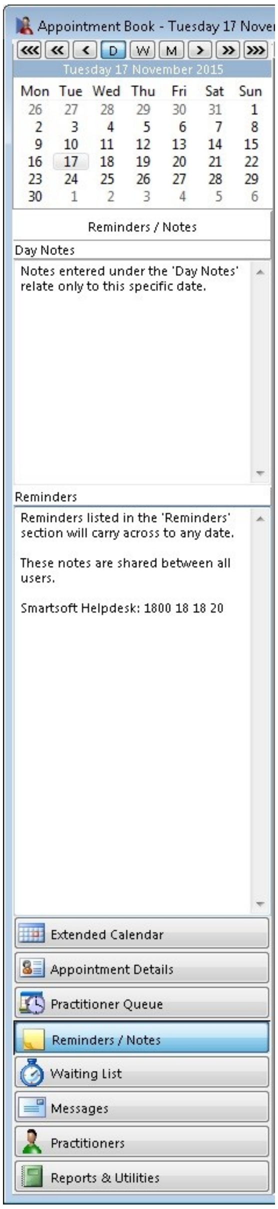
Refresh the Practitioner Queue

Working with the Appointment Book

Reminders/Notes allow you to enter in general practice reminders/notes viewable by all appointment book users. These notes can be for a specific day in **Day Notes** or viewable on all days with **Reminders**.

To enter day notes click in the window below the calendar titled **Day Notes** and type in notes regarding that particular day. A day note is only visible when viewing the day for which it was made.

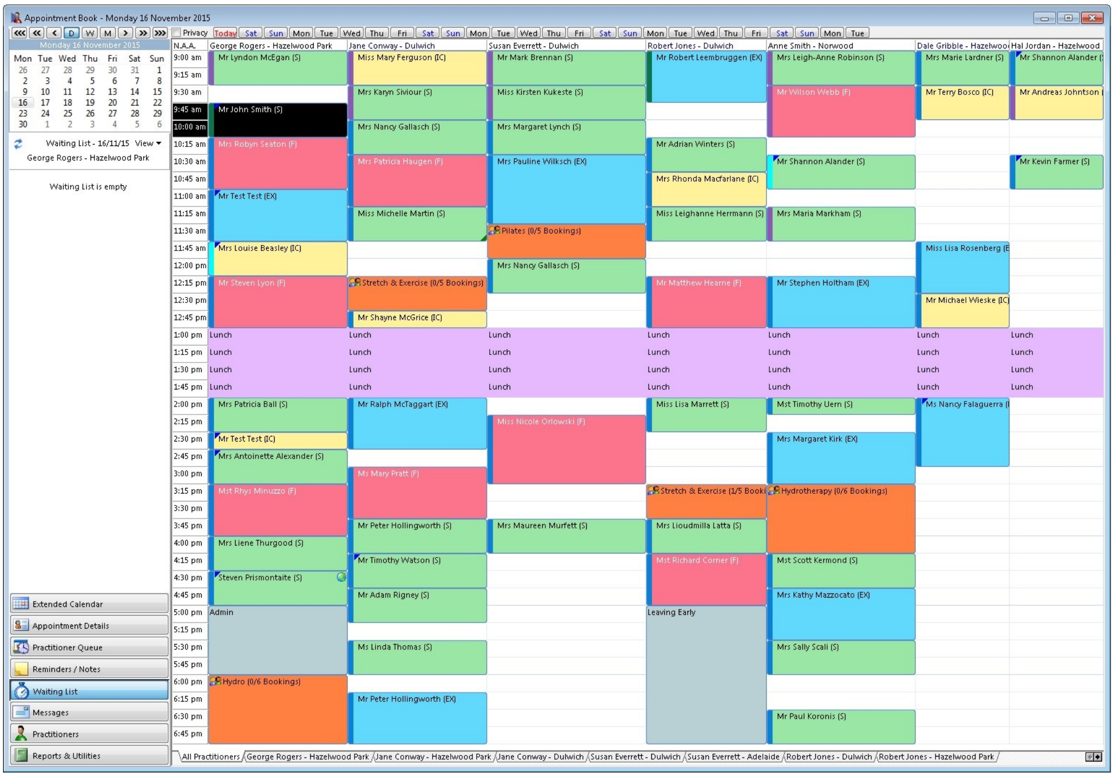
To enter reminders, click in the **Reminders** window and type your reminders.
A reminder remains visible regardless of the day being viewed.



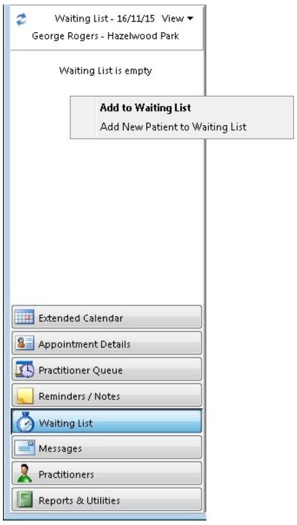
Waiting List

Clients who require an appointment when one is not immediately available can be placed on a waiting list, which will automatically notify the operator when an appointment meeting the client's availability becomes available.

To access the **Waiting List**, click the **Waiting List** option on the left hand side menu of the Appointment Book.

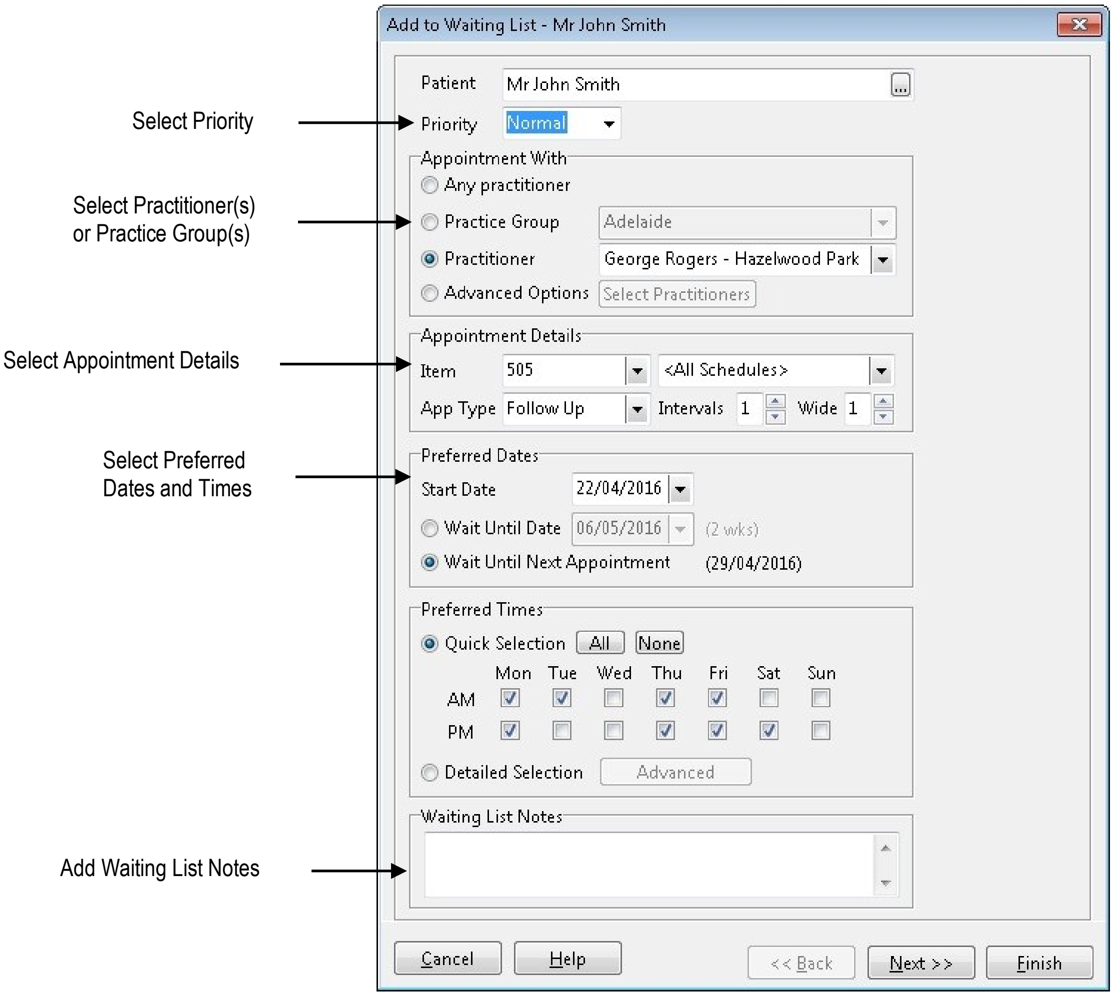


Patients can be added to the waiting list by double clicking in the blank area of the waiting list, or by right clicking and selecting **Add to Waiting List** or **Add New Patient to Waiting list**.



Waiting List

Selecting **Add to Waiting List** will allow users to select an existing patient to add to the Waiting List.

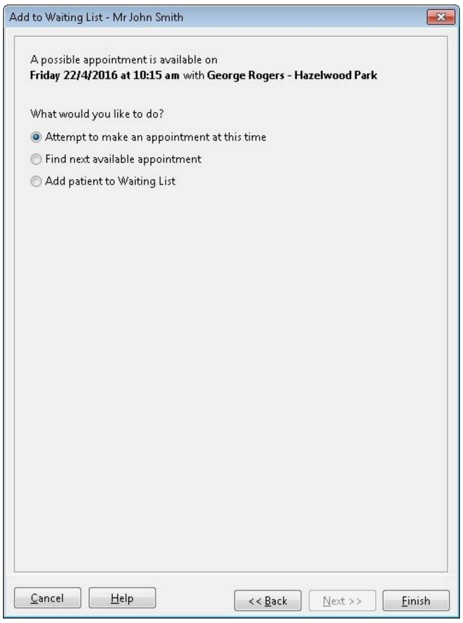


Users can select the priority of the appointment compared to other clients also waiting for appointments, practitioner(s) or practice group(s) the patient would like to see, their preferred times, how long they are willing to wait for an appointment to become available as well as adding any waiting list notes regarding this appointment.

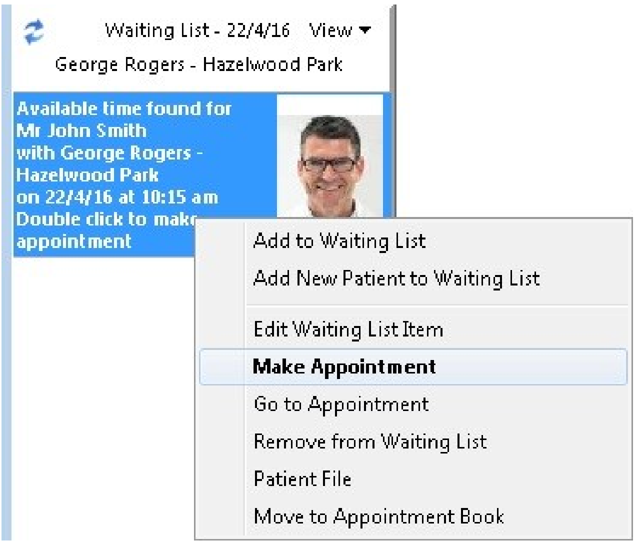
Clicking **Finish** will add the patient to the **Waiting List**.

Waiting List

Clicking **Next** will find the first available appointment if one is available.



If an available appointment time is found, an appointment can be made by clicking **Finish**. If the appointment time is not suitable, selecting **Find next available appointment** will present the user with another appointment time. If an appointment can not be found, the patient will be added to the **Waiting List**.



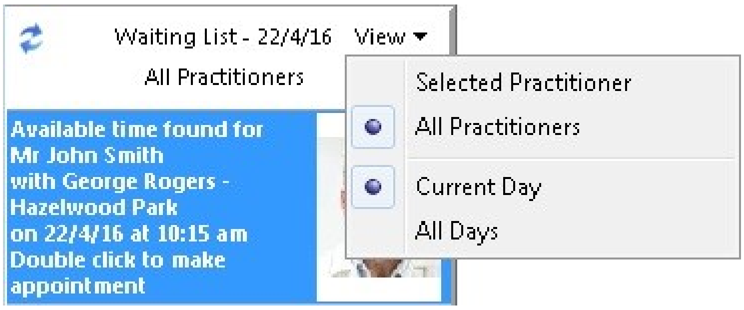
When an appointment is found, the appointment interval can be viewed by right clicking on the waiting list entry and selecting **Go to Appointment**. Alternatively, an appointment can be made by selecting **Make Appointment**, double clicking on the waiting list item, dragging and dropping the Waiting List item onto the Appointment Book or selecting **Move to Appointment Book**.

Front Desk 2017 - Note

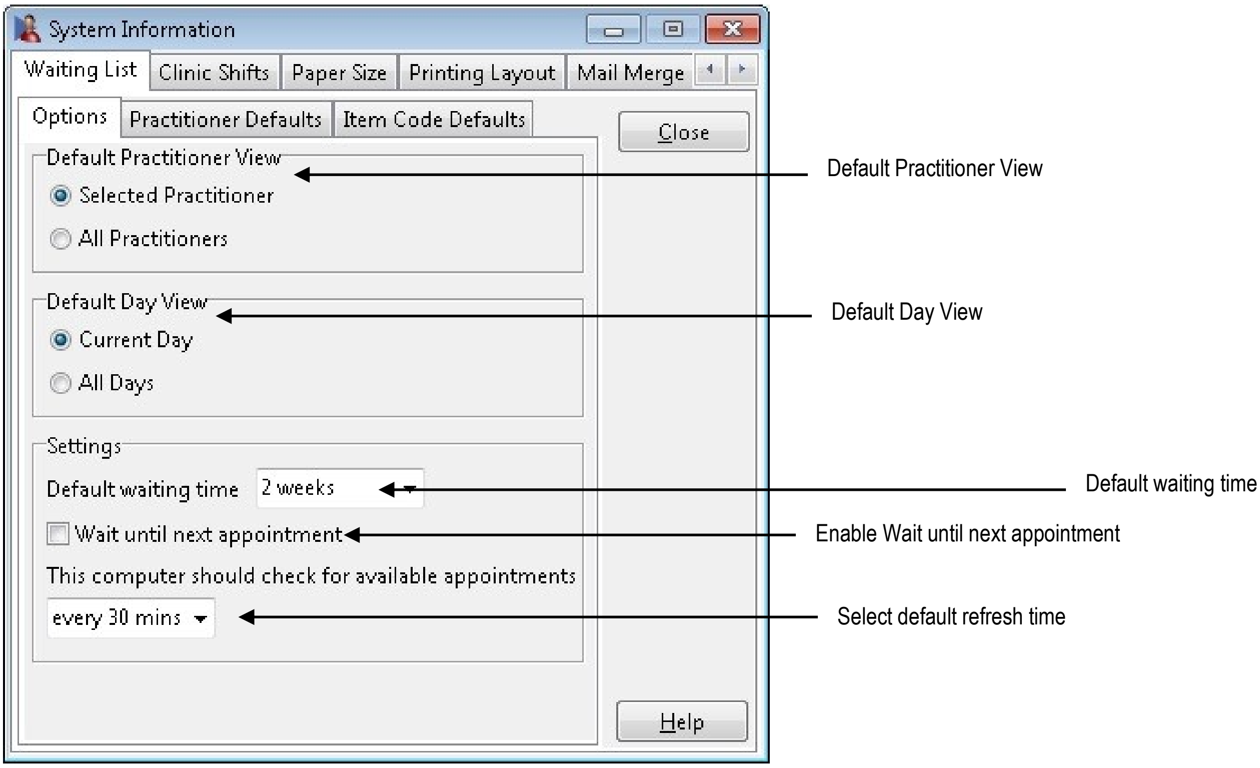
Appointments can be dragged/moved to the Appointment Book at any time, not just when an available appointment has been found.

Waiting List

By default, the Waiting List will only show people waiting for appointments on the selected Appointment Book day and selected practitioner column. The waiting list view options can be changed at any time by clicking the **View** menu. Any selection made under the view menu will be lost once *Front Desk 2017* is closed.



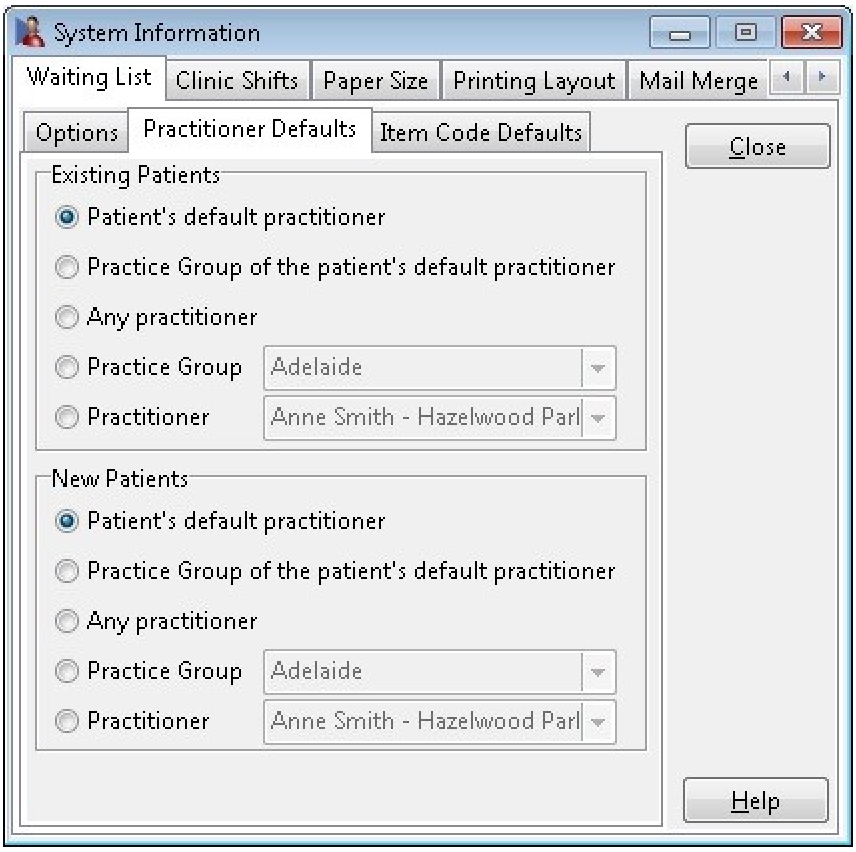
To permanently set the default waiting list view options, select the **Waiting List** tab in **System Information**.



The **Default Practitioner View**, **Default Day View**, **Default waiting time** and the frequency the system checks for available appointments can be set under the **Options** tab.

Waiting List

The **Practitioner Defaults tab** allows the user to select the default practitioner settings to be used when adding **New Patients** or **Existing Patients** to the Waiting List.

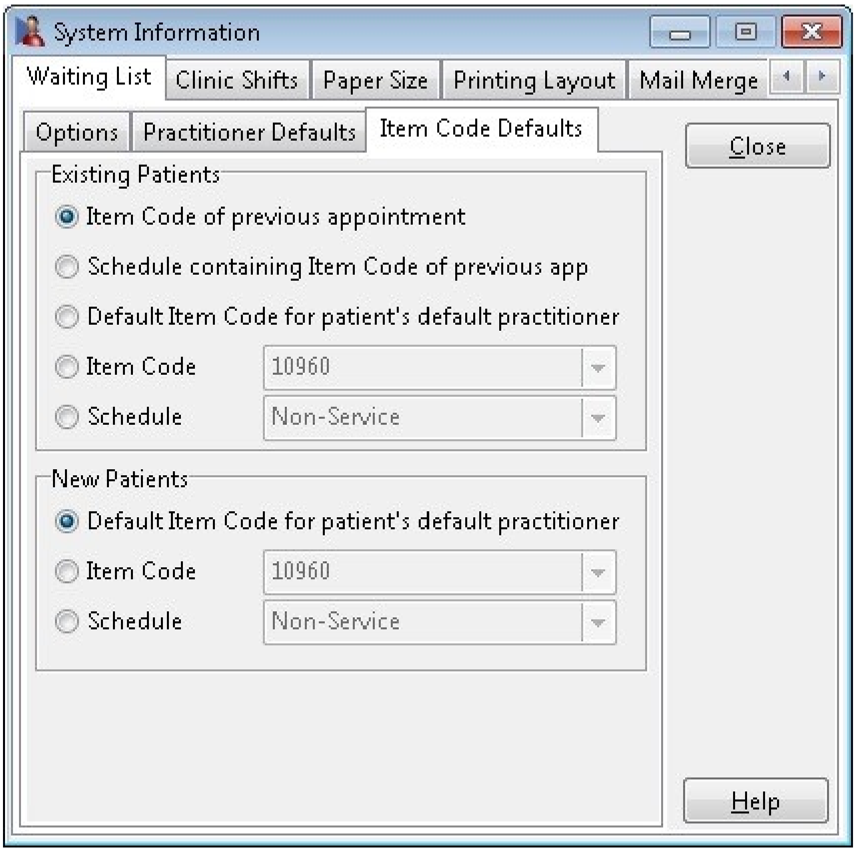


The following default practitioner options can be selected for **Existing Patients** and **New Patients**.

- **Patient's default practitioner**
- **Practice Group of the patient's default practitioner**
- **Any practitioner**
- Specific **Practice Group**
- Specific **Practitioner**

Waiting List

The **Item Code Defaults tab** allows the user to select the default item code settings to be used when adding **New Patients** or **Existing Patients** to the Waiting List.



The following default item code options can be selected for **Existing Patients**.

- **Item Code of previous appointment**
- **Schedule containing Item Code of previous appointment**
- **Default Item Code for patient's default practitioner**
- **Item Code**
- **Schedule**

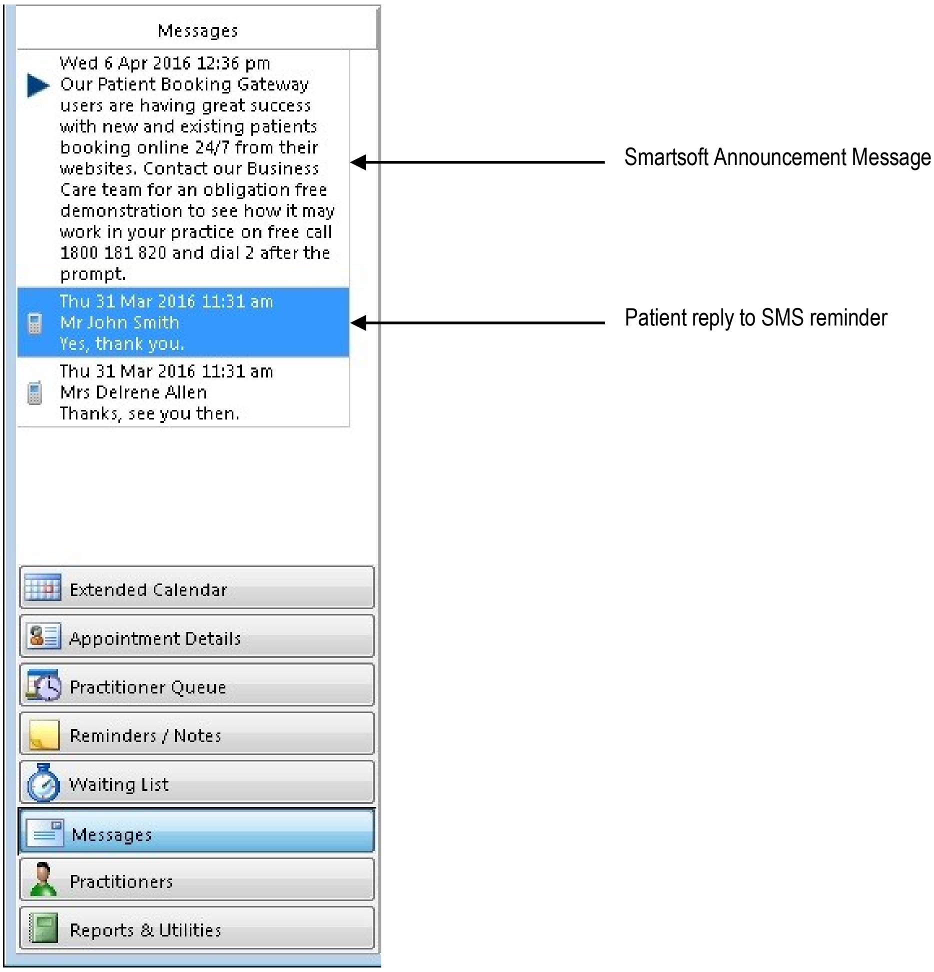
The following default item code options can be selected for **New Patients**.

- **Default Item Code for patient's default practitioner**
- **Item Code**
- **Schedule**

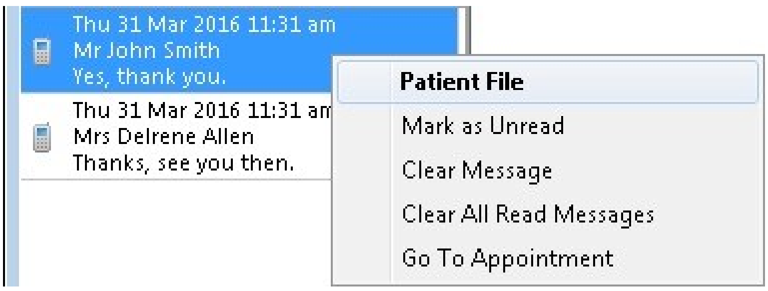
Messages

The **Messages** section on the Appointment Book displays SMS replies, Smartsoft messages and system messages. Unread messages will be displayed in bold.

Messages can be marked as read by clicking on them.



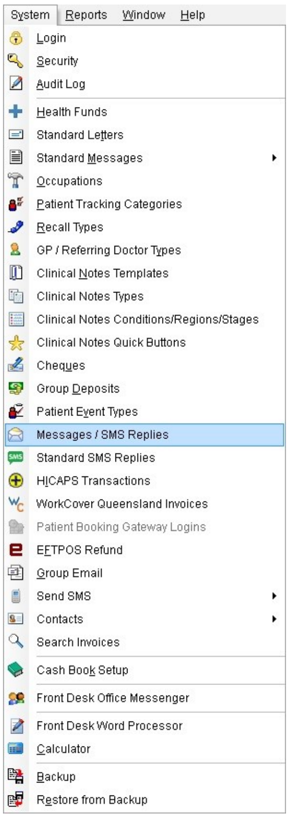
Right-clicking on a message provides options to **Mark as Unread**, **Clear Message** and to open the **Patient File** if the message is an SMS reply.



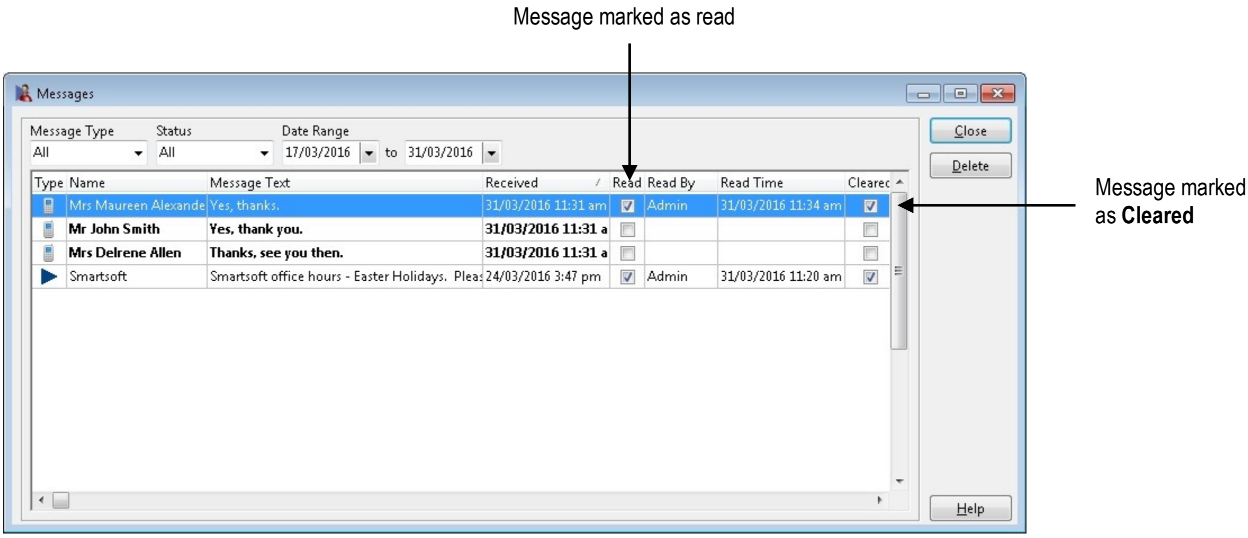
If a message is already marked as read, the right click menu will include an option to **Mark as Unread**.

Messages

All messages and SMS replies can be viewed by selecting **Messages / SMS Replies** from the **System** drop-down menu.



The **Messages** screen provides filtering options when viewing messages. The filtering options are **Message Type**, **Status**, and **Date Range**.

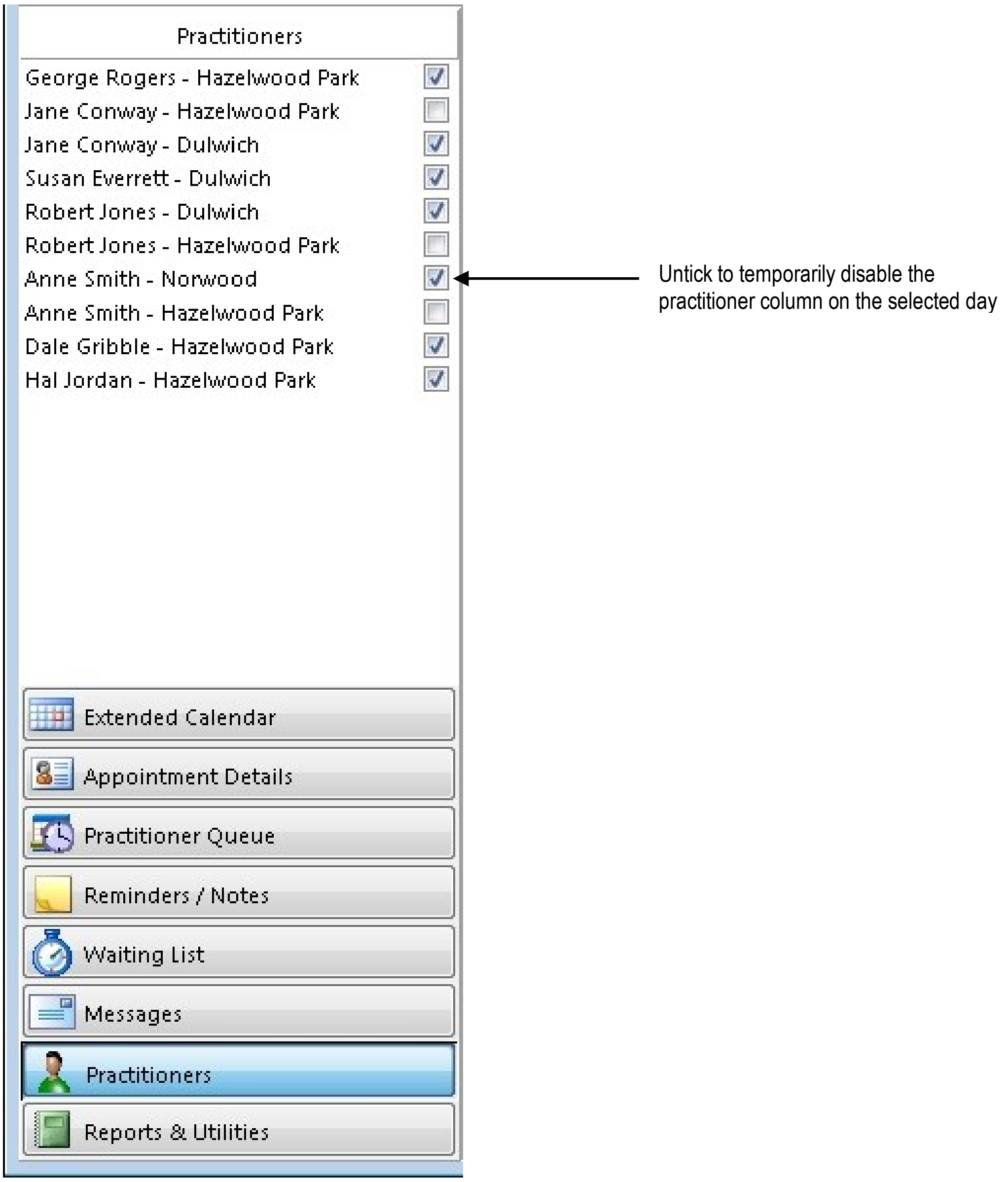


Right-clicking a message provides the options to **Mark as Read**, **Mark as Unread**, **Clear Message** and **Undo Clear Message**.

Practitioner Days

Practitioners can be temporarily enabled or disabled in the appointment book by ticking the options in the **Practitioners** section of the Appointment Book. To permanently disable a day of the week for a practitioner go to **System Information** > **Practitioners** > **Prac Days**.

These settings are per day and per computer and remain until the Appointment Book is closed.

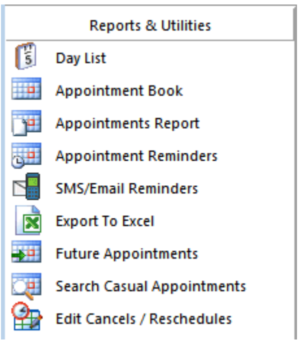


These options only disable the practitioner’s columns when viewing **All Practitioners** or a **Practice Group** in **Day View**. Week and Month views still display all days and selecting a practitioner’s tab will also display the practitioner even if they have been disabled on that day.

If all practitioners have been disabled the message **No practitioners are available on this day** will be displayed.

Report and Utilities

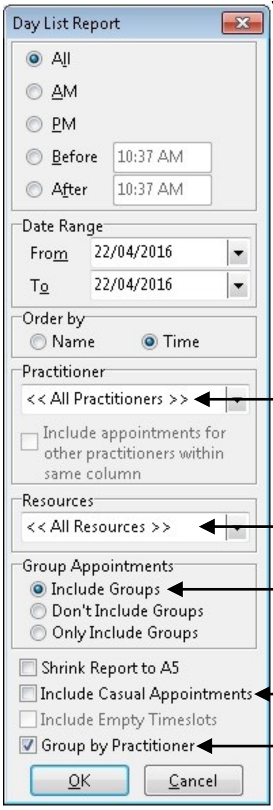
To view and print reports that are relevant to the Appointment Book select the **Reports & Utilities** button located at the bottom left hand corner of the Appointment Book.



Day List

The **Day List** report displays the details of appointments in the selected date range. The **Selected Practitioner** is determined by which column was previously selected on the Appointment Book.

Select the time of day to which the report applies:



All for all day
AM for morning shift
PM for afternoon shift
Before the specified time
After the specified time

The report can be printed for one day or a range of dates using the **Date Range**. Other options for the report include ordering the day list by **Name** or **Time**, overriding the **Selected Practitioner**, grouping the report by practitioner or shrinking the report to A5.

Select the desired practitioner (column name)

Select a **Resource**

Group Appointments options for printing on the **Day List**

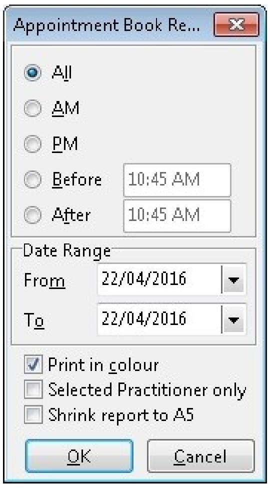
Include Casual Appointments on report

Group by Practitioner

Any **Notes** attached to an appointment will be printed next to the patient's name.

Appointment Book

The **Appointment Book Report** displays the clinic and practitioner appointments for the selected date range. The selected practitioner is determined by which practitioner column you have currently selected on the Appointment Book.



Select the time of day to which the report applies:

All for all day
AM for morning shift
PM for afternoon shift
Before the specified time
After the specified time

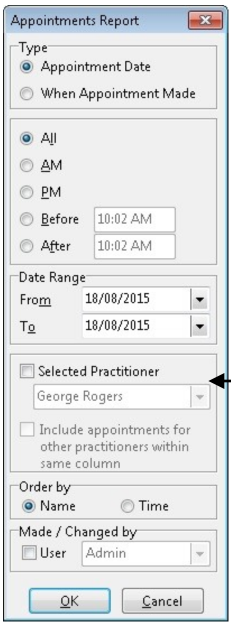
The **Appointment Book** report can be printed for one day or a range of dates by selecting the **Date Range**. Several options are available, which allow you to print the report in colour, select one practitioner only or shrink the report to A5 paper.

Front Desk 2017 - Note

To turn on the **Print in colour** option for Appointment Book reports by default, check the **Use Colour in Reports option** on the **Appointment Book** tab in **System Information**.

Appointments Report

The **Appointment Report** generates a list of all missed, processed, rescheduled and cancelled appointments for the date range selected. An appointment will be shown as missed if an hour has passed since the time of the appointment and the patient has not been billed. Any rescheduled appointments will only appear as rescheduled if the appointment has been changed to another day.



Select **Appointment Date** or **When Appointment Made**.

Select the time of day to which the report applies

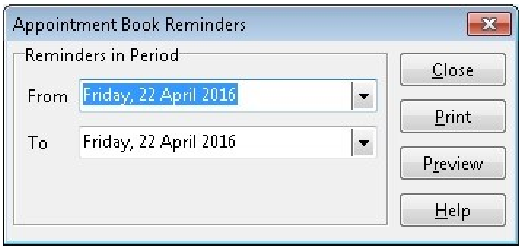
All for all day
AM for morning shift
PM for afternoon shift
Before the specified time
After the specified time

Select the desired practitioner (column name)

The report can be printed for one day or a range of dates using the **Date Range**. Other options for the report include ordering the list by **Name** or **Time** and filtering to a **Selected Practitioner** or Front Desk **User**.

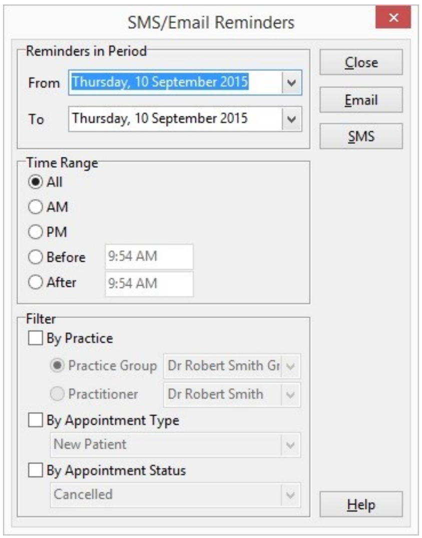
Appointment Reminders

The **Appointment Reminders** report displays the details of patients who have a reminder tag on their appointments within the specified date range.



SMS/Email Reminders

The **SMS/Email Reminders** report will enable you to send SMS messages and/or emails to the patients with **SMS/Email Reminder** tags set.

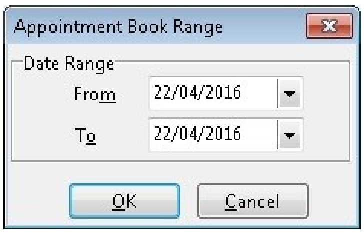


Front Desk 2017 - Note

Please refer to **SMS and Email Integration** in the **Advanced Features** section of this manual for full SMS/Email functions.

Export To Excel

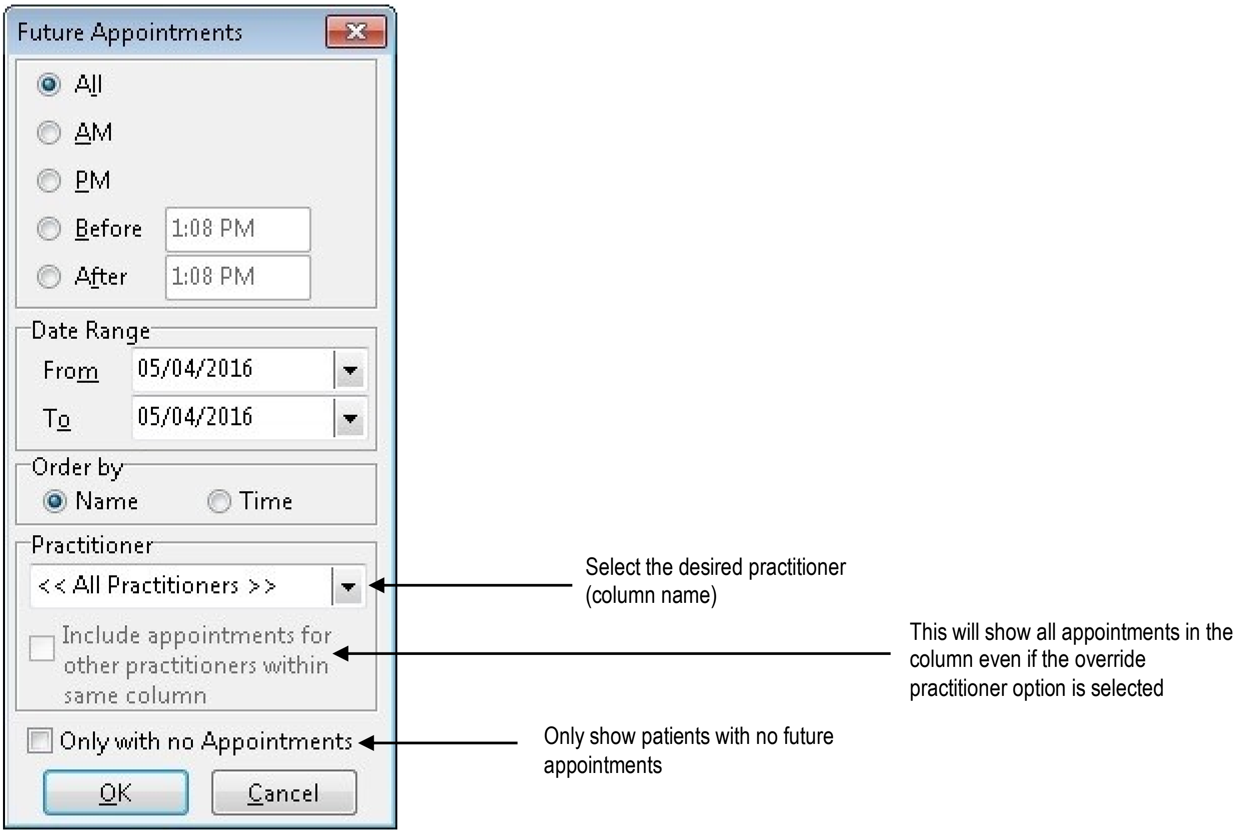
The **Export To Excel** option exports the appointment book into a Microsoft Excel® spreadsheet. This function can be used to take a copy of the appointments in a date range to another computer or PDA / mobile device that supports Microsoft Excel®. To use this option you must have Microsoft Excel® installed on your computer.



Future Appointments

The **Future Appointments** report can be used to display the next three appointment times for patients with appointments in the date range.

Select the time of day to which the report applies

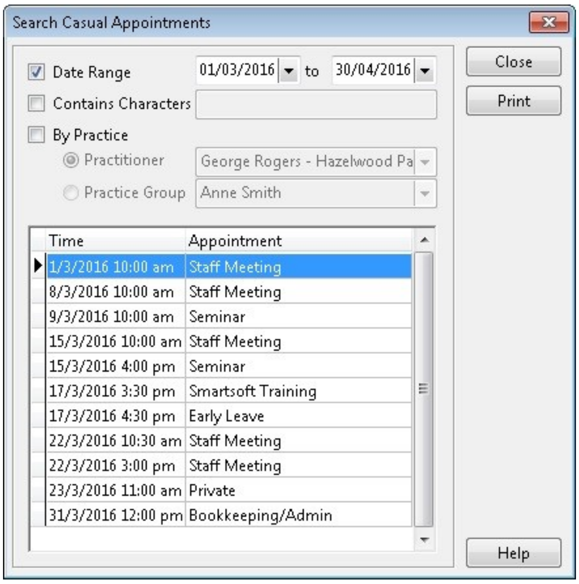


All for all day
AM for morning shift
PM for afternoon shift
Before the specified time
After the specified time

Set the **Date Range** of appointments to include in the report. Other options for the report include ordering the list by **Name** or **Time**, displaying a **Selected Practitioner** and displaying patients that have no appointments.

Search Casual Appointments

To search for a Casual Appointment, click the **Search Casual Appointments** icon.



Select the **Date** option to list casual appointments within a specific date range.

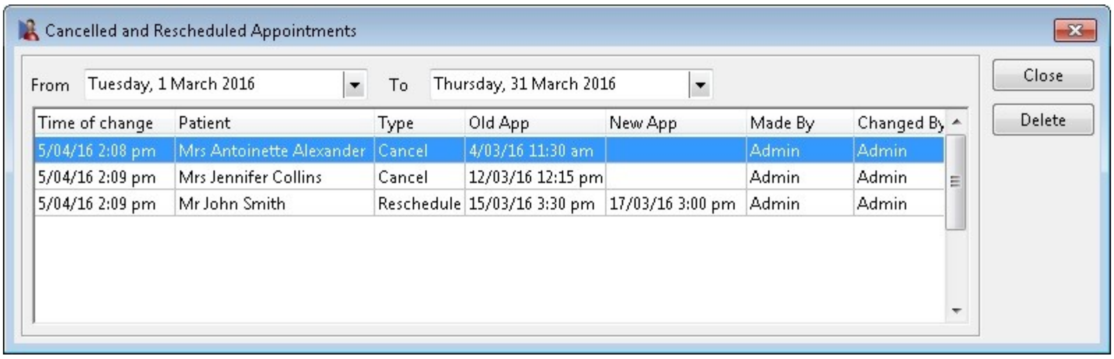
The **Contains Characters** option can be used to search for text in the description of a casual appointment. Enter part or all of the description to view casual appointments with a particular description (e.g. *staff to* list all *staff meetings*).

Select **By Practice** to view casual appointments for a particular practitioner or practice group.

Click **Print** to print the casual appointments list.

Edit Cancels / Reschedules

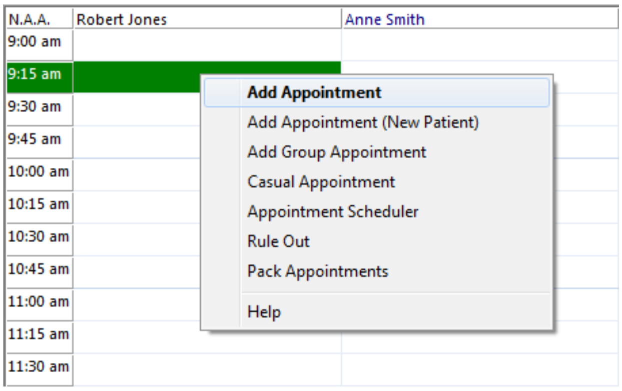
To delete any rescheduled or cancelled appointments click the **Edit Cancels/Reschedules** button.



Set the date range with the **From** and **To** date. Select the cancelled or rescheduled appointment that you wish to delete and click the **Delete** button.

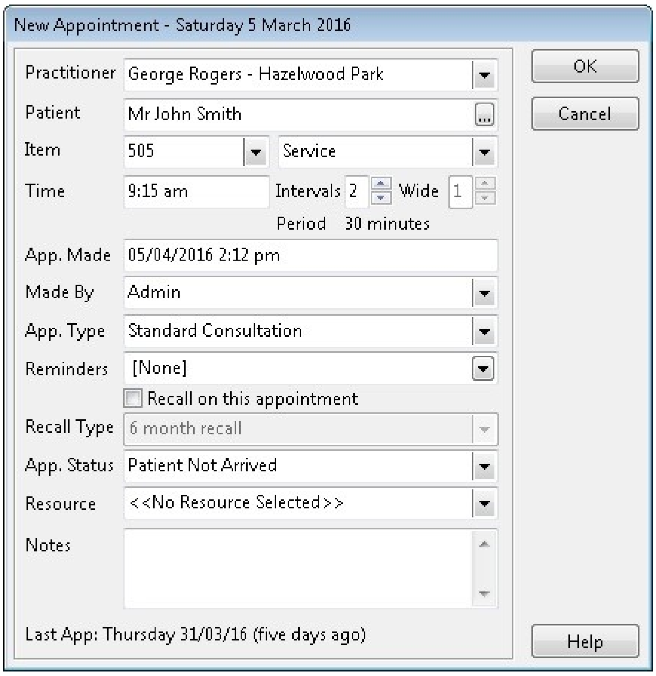
Making Appointments

To make an appointment, right click on an available time slot, this will bring up a popup menu as shown below. To make an appointment for more than one timeslot, hold the left mouse button down as you drag over the required time slots and then right mouse click.



To make an appointment for an existing patient, select **Add Appointment**. The **Search on Patient** screen will appear, search for the patient for whom you wish to make the appointment. To select the patient highlight their name and either click the **OK** button, double click, or use the **<ENTER>** key.

The **New Appointment** dialog appears.



The **Practitioner** field displays the practitioner whose column you had selected when you made the appointment. If the column has the override practitioner option set in **System Information**, you can then select an alternate practitioner.

The patient's name is displayed in the **Patient** field and may be changed by clicking the browse button .

Making Appointments

The **Item** field displays the default item code associated with the selected practitioner and the patient's fee category. These defaults were set previously in the **Practitioner** settings. Select a different item code from the drop-down box if required.

The **Time** field displays the time of the appointment and cannot be edited. To change the duration of the appointment use the up and down arrows next to **Intervals**. To change the width of the appointment (the number of appointment slots spanned by the appointment - for practitioners with more than one column) use the up and down arrows next to the **Wide** field.

The **App. Made** field displays the date and time the appointment was made and cannot be changed.

The **Made By** field displays the user who was logged on when the appointment was made. Select a different user's name by clicking on the **Made By** drop-down box.

App. Type indicates the type of appointment by displaying the time slot and patient's name in a certain colour. Default appointment types were set in **System Information** under the **Appointment Book** tab.

To add a patient's appointment to the reminders list, right click on the appointment and select the **Reminders** option, then choose from **Reminder**, **SMS Reminder** or **Email Reminder**. To change the colour of the reminder tag click **Colours** on the **Appointment Book** tab in **System Information**. For patients who wish to be reminded for every appointment, click on the **Appointments** tab from the patient file and select the appropriate option under **Remind Patient of Appointment**.

Select the **Recall on this appointment** option to create a recall for this patient on the day of this appointment.

Select the desired **Appointment status**, if it's different to the default.

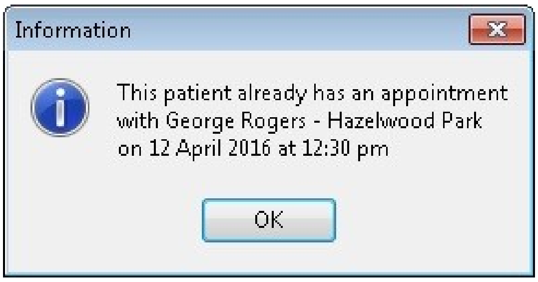
Select the desired **Resource**, if one is to be associated with this appointment.

The **Notes** field can be used to add a note regarding this appointment. When a note has been added to an appointment, a tag will appear in the bottom right hand corner of the appointment. To change the colour of the notes tag select **Colours** from the **Appointment Book** tab in **System Information**.

APPOINTMENT BOOK

Making Appointments

Click **OK** to confirm this appointment. The following window will appear when booking an appointment for a patient who already has a future appointment. This feature can be enabled / disabled on the **Appointment Book** tab in **System Information**.



If a patient has not been in for longer than a predefined period, the following screen will appear when booking an appointment. This feature can be enabled / disabled on the **Appointment Book** tab in **System Information**.

Click **OK** to continue making the appointment.

To view the details of a particular appointment including the patient's account balance, future appointments, waiting time and waiting time **After App** (appointment), move the mouse pointer over the patient's name in the Appointment Book.

Making Appointments

To view the number of appointments each practitioner has at a particular time, move the mouse pointer over a time interval (on the left of the appointment book). This feature is useful for practices running multiple columns where not all appointments may be visible on the screen at one time.

The tooltip displays the number of appointments for each practitioner at that time

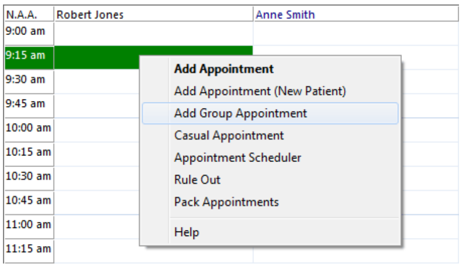
To make an appointment for a new patient, right click on an available time slot and select **Add Appointment (New Patient)** from the popup menu. A blank patient file will appear. Enter the patient details and click **OK** to save the file. The **New Appointment** dialog will appear.

A **Casual Appointment** is a non-patient appointment made within the Appointment Book. For example, this could be used to designate a staff meeting or any other non-patient appointments for the practitioner. Right mouse click on the particular time slot on the appointment book and select **Casual Appointment** from the short popup menu. The **New Casual Appointment** dialog appears. Enter a **Description** and, optionally, a **Note** and click **OK** to make the appointment.

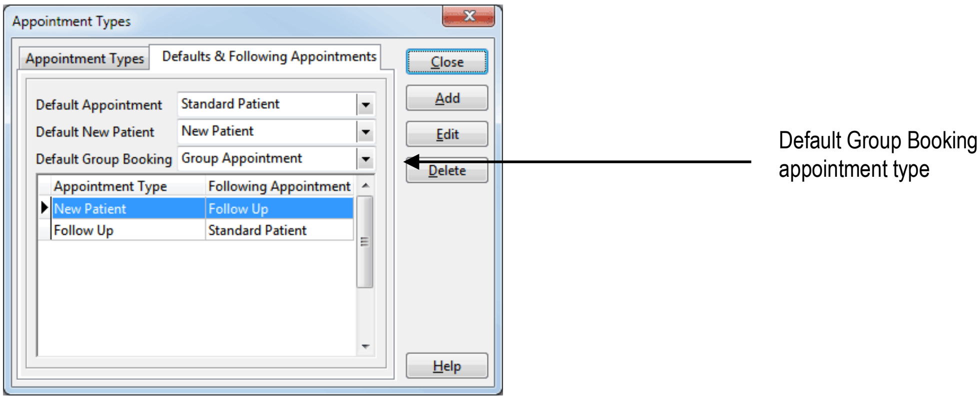
Group Appointments

Front Desk 2017 has the ability to book group appointments. This functionality can be used to book group sessions, classes, families or any other situation where the user would like to add multiple patients to one appointment.

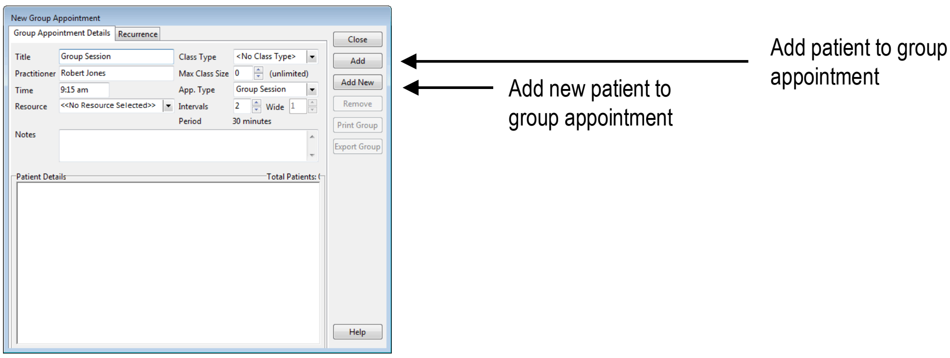
To add a new group appointment, right click on the desired time slot on the Appointment Book and select **Add Group Appointment**. To make a group appointment for more than one time slot, hold the left mouse button down as you drag over the required time slots and then right click.



The default group appointment type can be set in the **Appointment Book** tab of **System Information**. Click **App Types**, select the **Default & Following Appointments** tab and set the **Default Group Booking** appointment type.

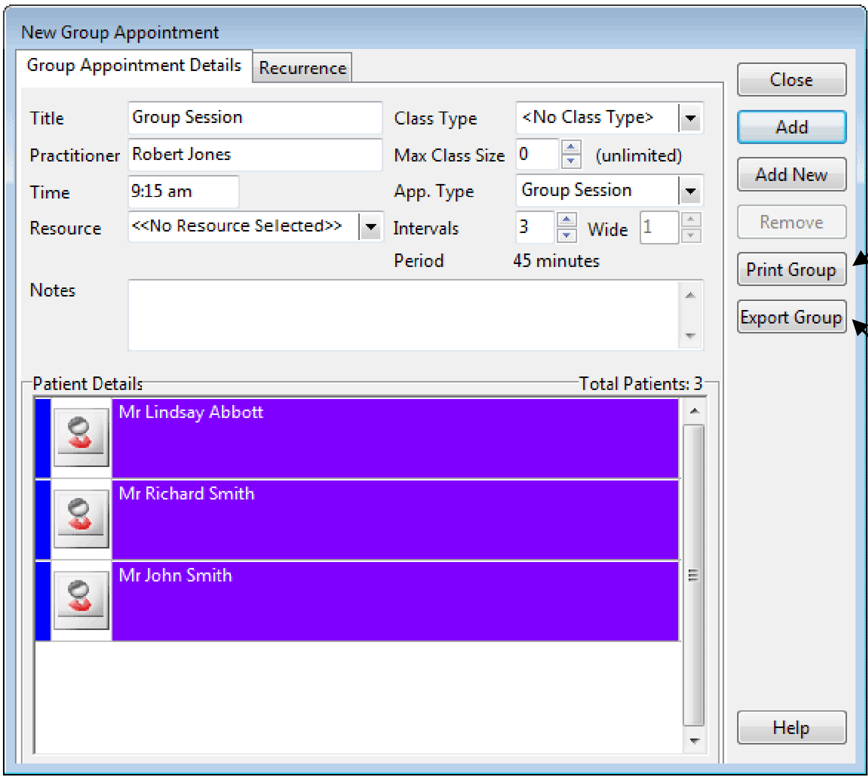


The **New Group Appointment** dialog will be displayed. **Title** is the name of the appointment, which is displayed on the appointment book (i.e. Exercise Class). Users can select the appropriate **App. Type**, number of **Intervals** and columns **Wide**. To add existing patients to the group appointment click **Add**. New patients can be added by clicking **Add New**.



Group Appointments

The group appointment will display the **Patient Details** of those in the booking.



Print Group will print a **Day List** of patients in the **Group Appointment**

Export Group will export a **list** of patients in the **Group Appointment** to a CSV file or Excel file

A group appointment on the Appointment Book displays the title and the number of patients added to the appointment. Placing the mouse pointer over the group appointment will display the names of the patients in the booking and any notes that may have been added.

Group Appointments

Right clicking on the group appointment gives the following options:

Edit Group Appointment: Opens the **Edit Group Appointment** screen which allows users to edit the Title, Appointment Type, Intervals, Notes and Add/Remove patients from the appointment. For recurring Group Appointments, users are given the option of whether to edit the single group appointment only, or all future Group Appointments within the schedule.

Make Next Appointment: Users can schedule the next group appointment. There is an option to make the Next Appointment with the same group of patients from this Appointment or to add a Group Appointment with no patients (an empty group).

Change Appointment: Allows rescheduling of the group appointment. Users also have the ability to reschedule the appointment by dragging and dropping the group appointment on the Appointment Book.

Delete Appointment: Removes the group appointment from the Appointment Book. The user will have the option to record the deletion as a cancellation at this point.

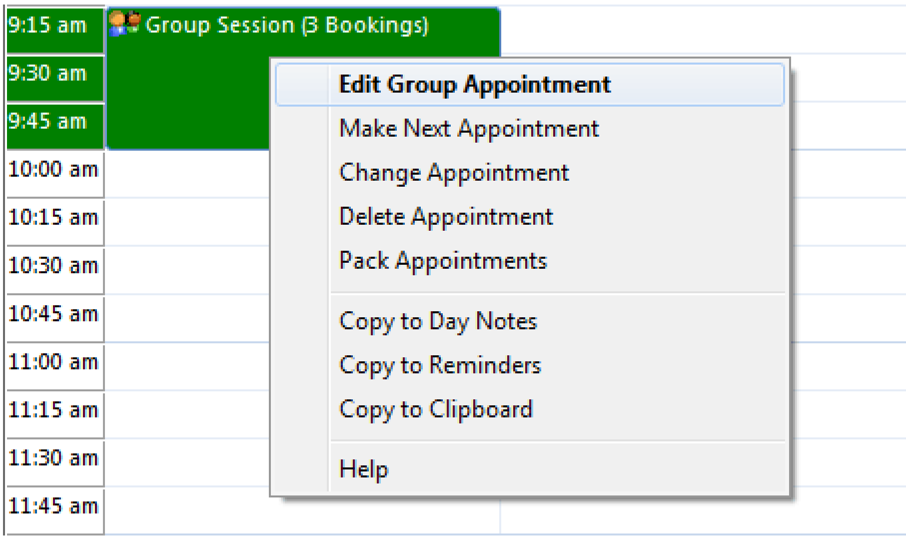
Pack Appointment: Moves Appointments to the practitioners left most column where possible.

Copy to Day Notes: Copies the group appointment title to the **Day Notes** field.

Copy to Reminders: Copies the group appointment title to the **Reminders** field.

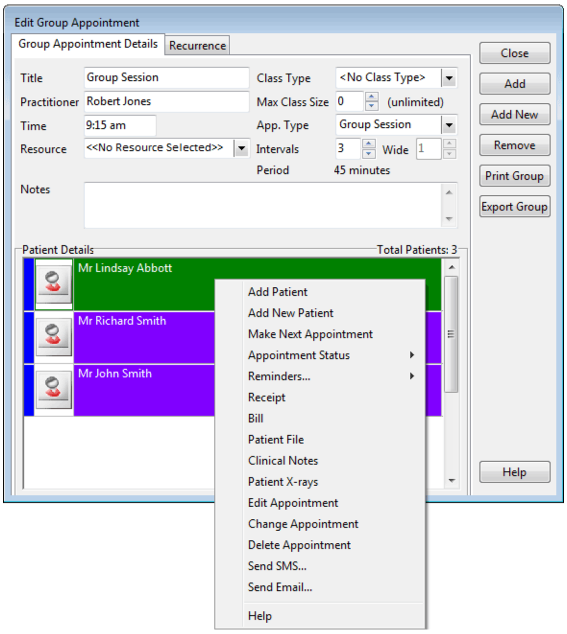
Copy to Clipboard: Copies the group appointment title to the Clipboard.

Help: Opens the Help file for more information on working with the Appointment Book.



Group Appointments

Right-clicking on a patient's name in the **Edit Group Appointment** dialog opens a menu with the following functionality:



Add Patient: Adds an existing *Front Desk 2017* patient to the group appointment.

Add New Patient: Adds a new patient to the group appointment.

Make Next Appointment: Makes the next appointment for the patient.

Appointment Status: Sets the appointment status for that patient.

Reminders: Sets an appointment reminder for that patient.

Receipt: Receipts the patient for this appointment.

Bill: Bills the patient for this appointment.

Patient File: Opens the patient file.

Clinical Notes: Opens the patient's clinical notes.

Patient X-Rays: Opens the patient file to the X-Rays tab.

Edit Appointment: Opens the patient's appointment for editing.

Change Appointment: Changes the patient's appointment to another time.

Delete Appointment: Deletes the patient's appointment from the group appointment.

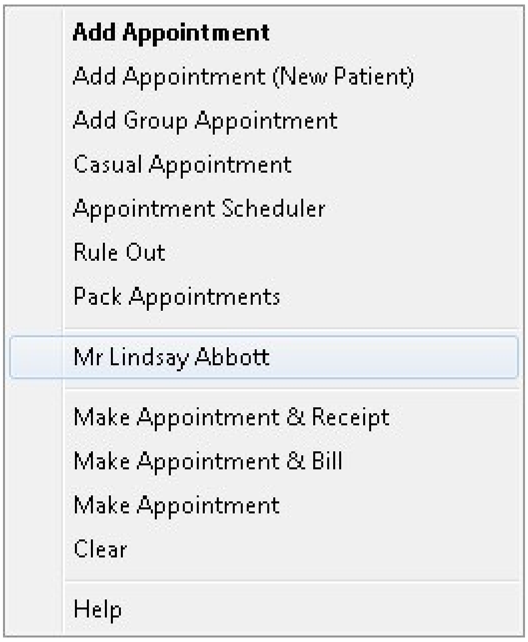
Send SMS: Sends the patient an SMS message.

Send Email: Sends the patient an email.

Group Appointments

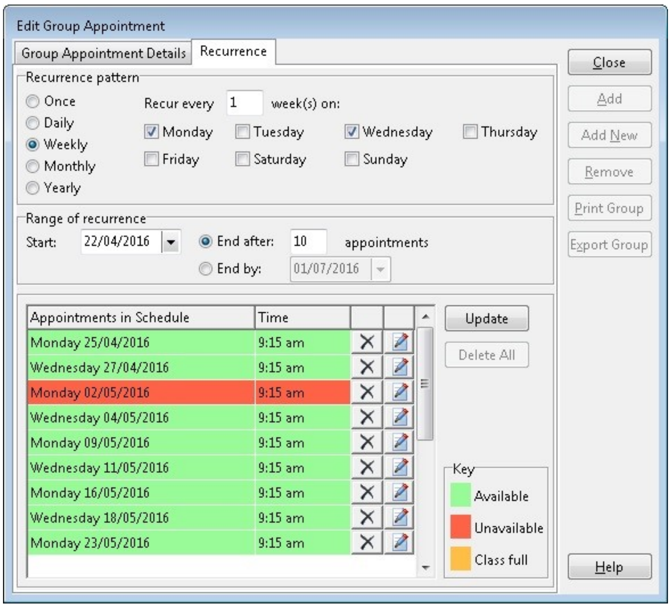
If **Change Appointment** has been selected for a patient's appointment, the **Change Appointment To** option is available.

If **Make Next Appointment** has been selected for a previous patient's appointment, **Make Appointment & Receipt**, **Make Appointment & Bill** and **Make Appointment** are available.



Group Appointments

Select the **Recurrence** tab to repeat the group appointment on a set basis.



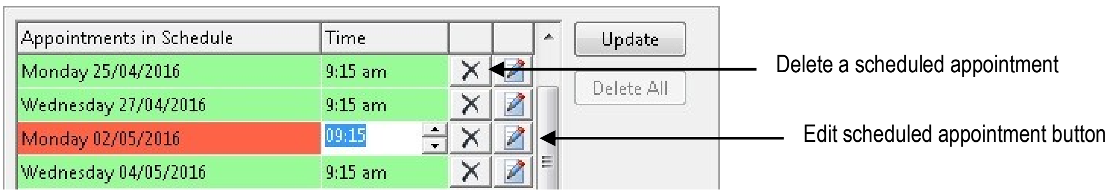
Set a **Recurrence Pattern** by selecting which time interval to repeat the appointment upon; **Once**, **Daily**, **Weekly**, **Monthly** or **Yearly**.

Depending on the repetition interval selected, different options will become available to customise the recurrence.

The **Range of Recurrence** allows the user to specify the initial appointment date, and the total number of recurrences.

Appointments listed in **green** are within available timeslots. Appointments listed in **red** are unable to be created and must be rescheduled or removed before continuing.

To adjust a specific appointment, select the edit icon to enter a new time value in 24-hour time.

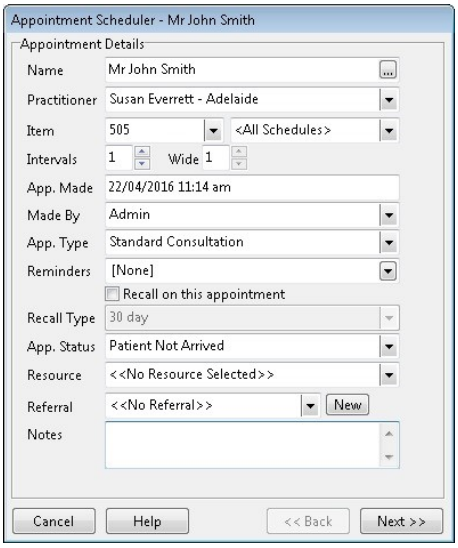


Once the scheduled group appointment has been changed to an available timeslot, the line will turn green automatically.

Click **Close** to complete the group appointment and schedule any recurring appointments.

Appointment Scheduler

To make multiple appointments, right click on an available time slot and select **Appointment Scheduler** from the popup menu. Select the patient's name from the **Search on Patient** screen and click **OK**. The **Appointment Scheduler** dialog will appear.



The **Practitioner** field displays the practitioner whose column you were in when Appointment Scheduler was selected.

The **Item** field displays the default item code associated with the selected practitioner and the patient's fee category. These defaults were set previously in the **Practitioner** screen. Select a different item code from the drop-down box if required.

To change the duration of the appointment use the up and down arrows next to **Intervals**. To change the width of the appointment (the number of appointment slots spanned by the appointment - for practitioners with more than one column) use the up and down arrows next to the **Wide** field.

App. Made indicates the time the appointment was made.

Made By is set to the user who is making the appointment.

App. Type indicates the appointment type.

Reminders allows a reminder type to be set for each appointment scheduled.

Recall Type sets a specific recall type for each appointment.

App. Status can be set to a specific status for each appointment.

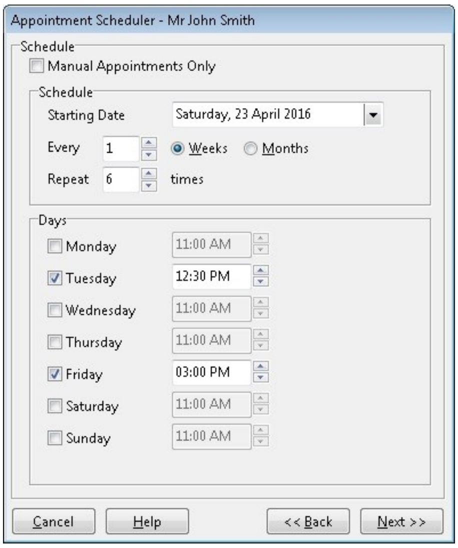
A **Resource** can be assigned to this appointment.

Notes can be added for each appointment.

Click **Next** to proceed to the next stage.

Appointment Scheduler

The following **Appointment Scheduler** dialog is displayed.



The Appointment Scheduler functions in three ways: the ability to make manual appointments, scheduled appointments or a combination of both.

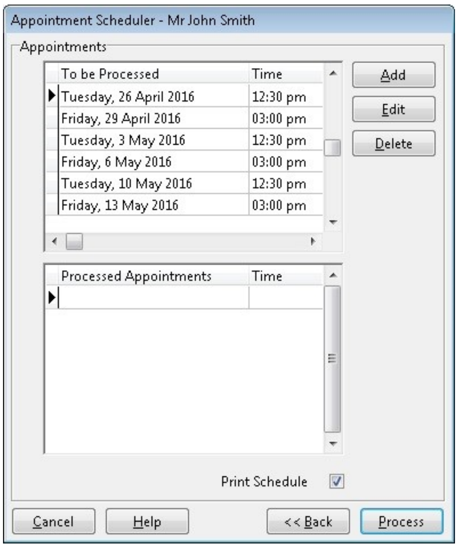
If appointments are to be made weekly, check the **Weeks** option, alternatively check the **Months** option for monthly appointments.

Appointments can be scheduled to **Repeat** a certain number of times. The above example shows appointments scheduled twice a week for 6 weeks.

To change the time on a particular day select the hour, minutes or the AM/PM, and use the up and down arrows to change accordingly.

To continue click **Next**.

You will be presented with a dialog similar to the one below.



Appointment Scheduler

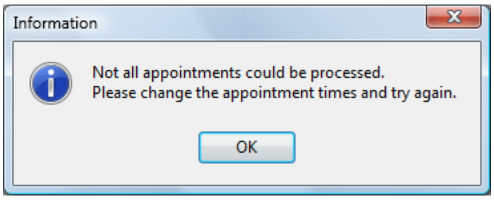
The dates and times of each appointment to be made are now displayed. To change either the date or time of the appointment, click in the corresponding field and select the new date / time.

From here you can also **Add**, **Edit** or **Delete** appointments from the list.

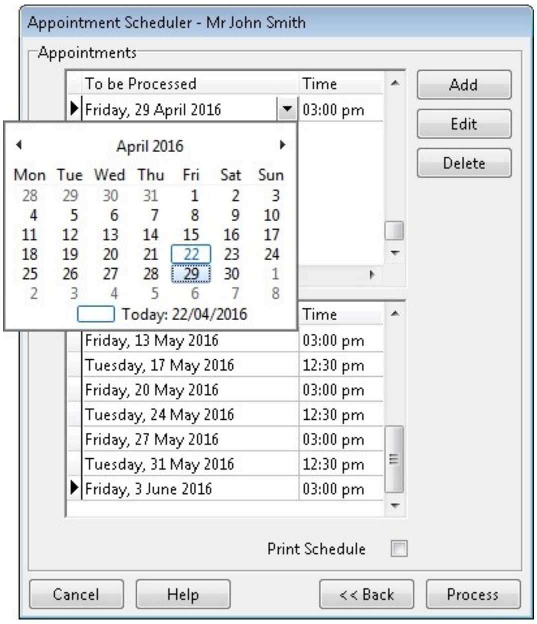
To process these appointments click **Process**.

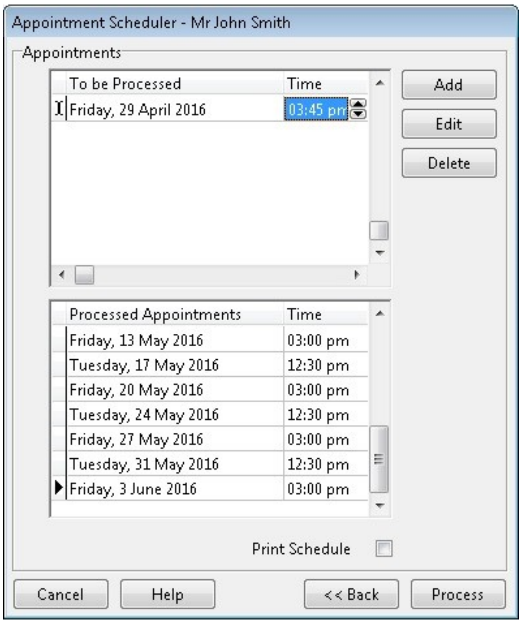
To go back and change the selected options in the scheduler, click **Back**.

If any of the appointment(s) could not be made, due to a conflict with existing appointments, an **Information** dialog will appear. Click **OK**.



Successfully scheduled appointments will move into the **Processed Appointments** area while unsuccessful appointments remain in the **To be Processed** area.



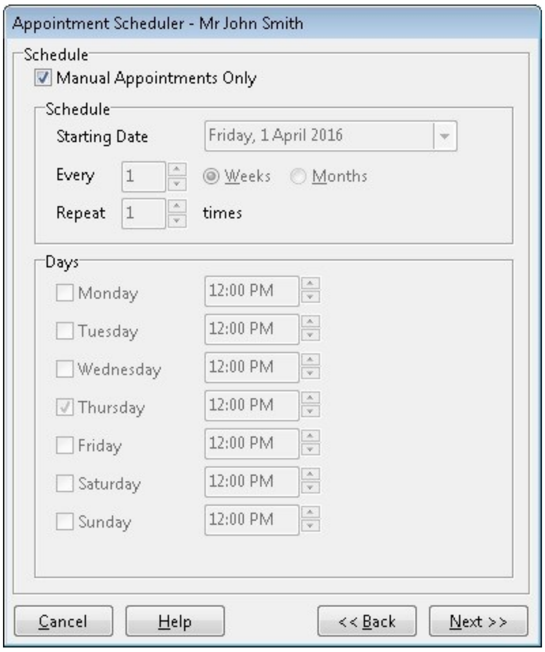


For the remaining appointments to be processed changes need to be made to the date or time (due to a conflict with other appointments). To do this click the up and down arrows in the time field to make the appointment earlier or later. By using the arrows the system will automatically go to the next available time or date. Click **Process** once again to process the altered appointments.

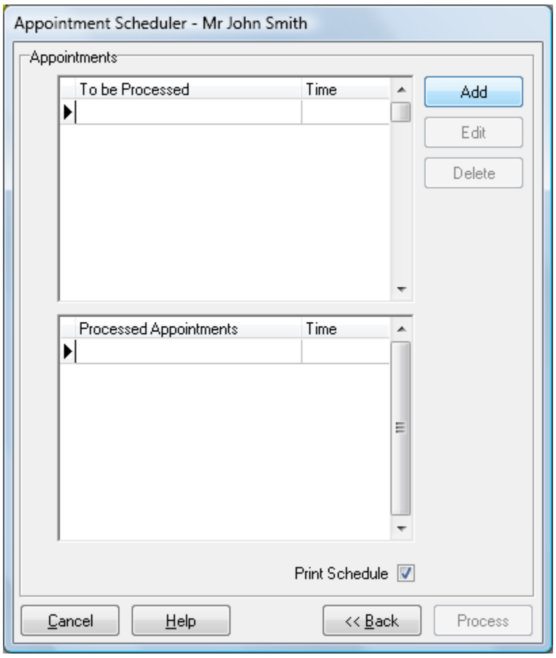
When all appointments are processed, click **Finish**.

Appointment Scheduler

The Appointment Scheduler can be used to add manual appointments. Check the **Manual Appointments Only** option to enable this feature.

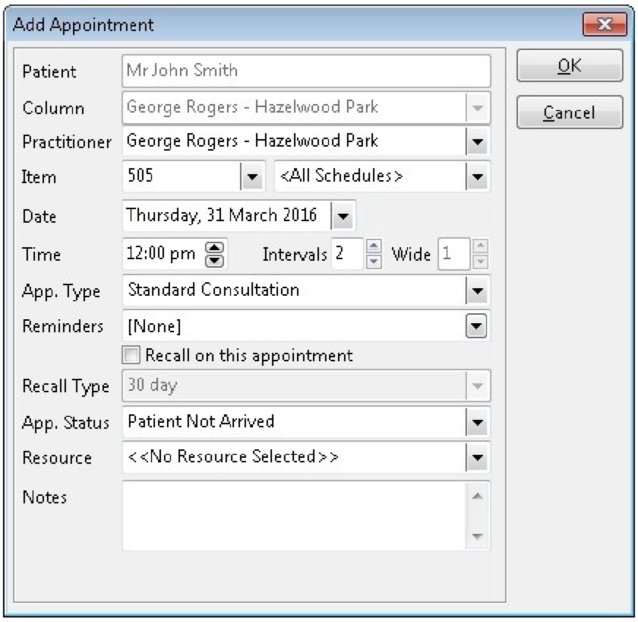


Clicking **Next** will take you to a screen where you can add manual appointments.

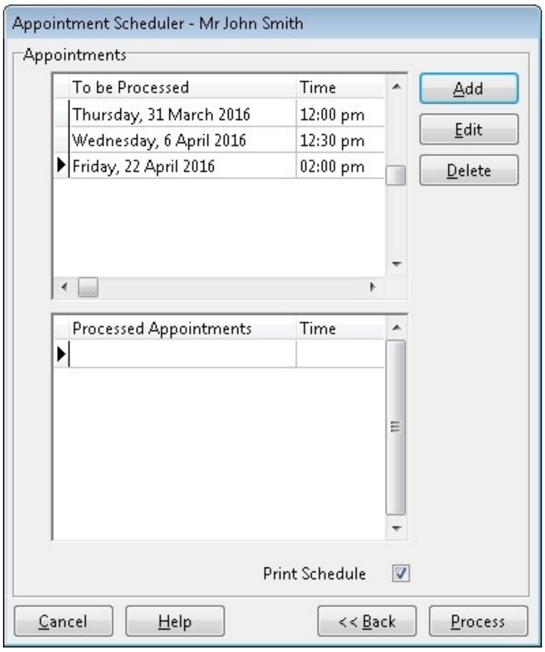


Appointment Scheduler

Click **Add**. The following dialog **Add Appointment** will be shown. Manual appointments can be now scheduled by changing the appointment details. Click **OK** to close the dialog and add the appointment.



Repeat this process until you have added all the appointments you wish to schedule.

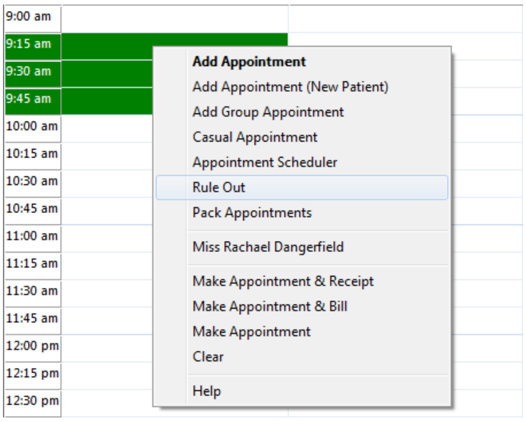


Click **Process** to proceed and finalise your appointments. Appointments that cannot be processed can be rescheduled by altering the date or time field.

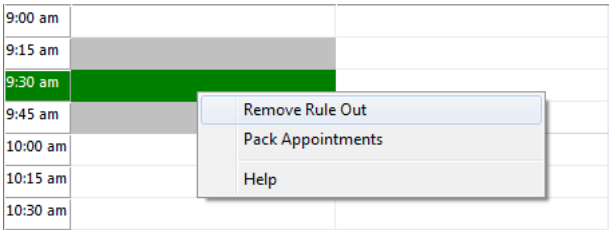
Appointment Book Functions

Rule Out

To rule out one or more appointment times, right click on the required time slots and select **Rule Out** from the popup menu. Rule outs can be regarded as *hard* rule outs, meaning that appointments *cannot* be made within the areas ruled out.

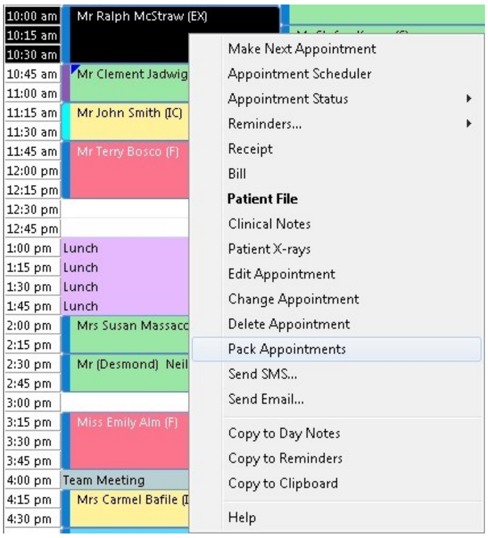


To remove a **Rule Out** right click on the ruled out cell and select **Remove Rule Out**.



Pack Appointments

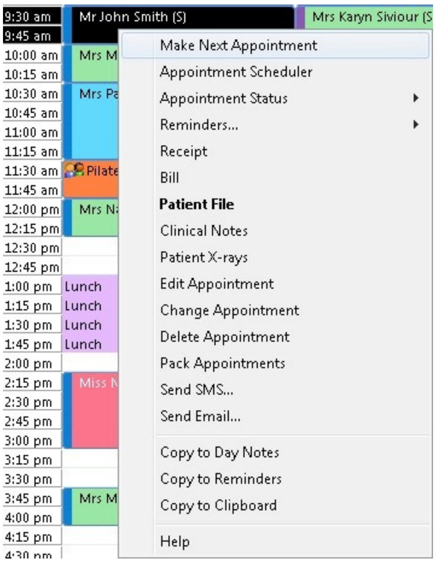
To move appointments so that they occupy the left-most available times for a practitioner with more than one column, select **Pack Appointments** from the popup menu.



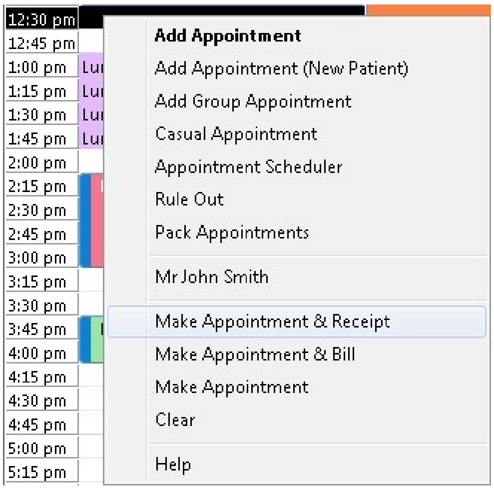
Appointment Book Functions

Make Next Appointment

To make a next appointment for a patient, right click on their current appointment and select **Make Next Appointment** from the menu.



At this stage, it will appear as though nothing has happened; *Front Desk 2017* is waiting for you to select the required date for the next appointment. Select the day and then the time interval(s) required for this next appointment and right click to display the popup menu.



To make the next appointment, select **Make Appointment** under the patient's name in the popup menu. To bill or receipt the current consultation in addition to making the next appointment, select **Make Appointment & Receipt** or **Make Appointment & Bill** respectively.

Front Desk 2017 - Tip

The **Make Appointment & Receipt** and **Make Appointment & Bill** options can be used to simplify the process of both billing and making an appointment. It also ensures that the next appointment is printed on the receipt or bill.

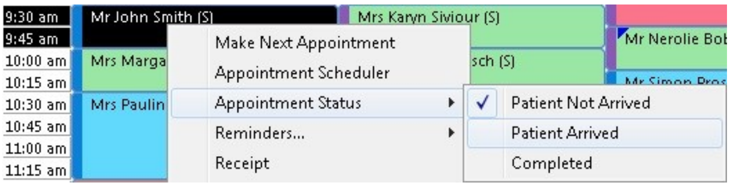
Appointment Book Functions

Appointment Scheduler

To make multiple appointments from an already made appointment, right click on the patient's appointment and select **Appointment Scheduler** from the popup menu. Use the **Appointment Scheduler** dialog as previously described.

Appointment Status

To indicate that a patient has arrived, right mouse click on that patient's appointment and select **Appointment Status** and then **Patient Arrived** from the popup menu. At this point *Front Desk 2017* will begin to record the amount of time that the patient has been waiting. To view the waiting time, move the mouse cursor over the patient's appointment and the time will be displayed within the appointment information tool tip.

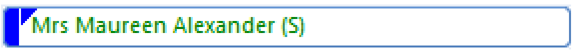


An appointment can be set to any appointment status from the status list i.e. choosing **Completed** will change the colour of the status to indicate the appointment is processed.

The option to **Add**, **Edit** or **Delete** an appointment status can be located under the **Appointment Book** tab in **System Information**.

Appointment Reminder

To add a patient with an appointment to the reminders list, right click on the patient's appointment and select **Reminders**, then select which type of reminder is required. For patients who wish to be reminded for every appointment, click on the **Appointments** tab from the patient file and select the appropriate option under **Remind Patient of Appointment**. To change the colour of the reminder tag click **Colours** on the **Appointment Book** tab in **System Information**.



Receipt

To receipt a patient from the appointment book, right click on the appointment and select **Receipt** from the popup menu. Any outstanding amount for the patient will be displayed at the top of the receipt window.

Bill

To bill a patient from the appointment book, right mouse click on the appointment and select **Bill** from the popup menu. Any outstanding amount for the patient will be displayed at the top of the bill window.

If **Bill** or **Receipt** is selected for a future appointment you will be asked if you want to set the date of the Bill/Receipt to the date of the future appointment.

Appointment Book Functions

Patient File

To open a patient's file from the appointment book, either right click on the appointment and select **Patient File** or double click on the patient's appointment.

Clinical Notes

To open the patient’s file directly to their clinical notes tab, right click on the appointment and select **Clinical Notes**.

Editing Patient Appointments

To edit an appointment, right click on the appointment and select **Edit Appointment** from the popup menu.

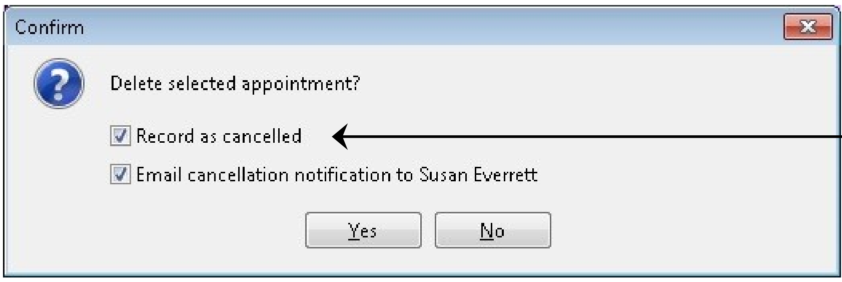
Rescheduling Patient Appointments

To reschedule an appointment, right click on the patient’s appointment and select the **Change Appointment** option. Right click on the new appointment time (this can be on another day) and select **Change Appointment**. To confirm the change click **Yes**, or click **No** to cancel from the confirmation dialog.

It is also possible to drag and drop appointments to reschedule them. To drag the appointment to another day, drag to the relevant day button at the top of the appointment book or to the specific date on the calendar then release on the desired time for that day. When doing this an optional message will appear asking to confirm the appointment change (this feature is to reduce the chance of accidentally moving an appointment).

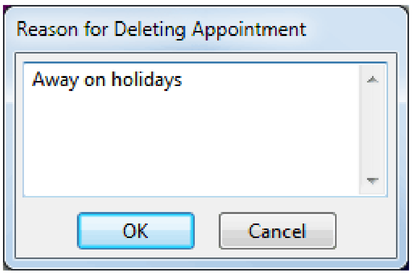
Deleting an Appointment

To delete an appointment, right click on the appointment and select **Delete Appointment.** The following dialog will be shown.



Record as cancelled option

If the **Record as cancelled** option is checked you will be prompted to give a reason. Cancelled appointments are recorded in the **Appointments Report** and in the patient’s file.



Appointment Book Functions

If Email cancellation notification to '*Practitioner*' is enabled, the practitioner will be emailed to notify them of the cancelled appointment.

An email address needs to be entered in the practitioners file for this option to become available, and it will only appear when deleting future appointments.

Show Notes

When an appointment has a note attached, the **Show Notes** option will appear in the popup menu; this allows you to view the notes. A green tag in the bottom right-hand corner will also appear on the appointment cell if there are notes attached.
The appointment notes can also be viewed by moving the mouse pointer over an appointment. To change the colour of the notes tag click **Colours** on the **Appointment Book** tab in **System Information**.

Send SMS…

To send an SMS to the patient, right click on the patient's appointment and select **Send SMS…** You will be presented with a screen where you can type in an SMS message or select from a list of message templates.

Send Email…

To send an email to the patient, right click on the patient's appointment and select **Send Email…** You will be presented with a screen where you can type in an email message or select from a list of message templates.

Copying to Day Notes, Reminders and Clipboard

Patient names in the Appointment Book can be copied to the *Day Notes*, *Reminders* and *Clipboard*. To copy a patient's name to one of these areas, right click on the appointment and select **Copy to Day Notes**, **Copy to Reminders** or **Copy to Clipboard** from the popup menu.

Birthday Tag

Patients who have an appointment on their birthday will automatically have a blue tag appear on the bottom left-hand corner of the appointment. To change the colour of the birthday tag click **Colours** on the **Appointment Book** tab in **System Information**.

Appointment Book Functions

Appointment Statistics

To track rescheduled, cancelled and missed appointments you can view the statistics for each practitioner by moving the mouse cursor over the practitioner's name at the top of the appointment book. To view the statistics for all practitioners for a day move the mouse cursor over the **N.A.A.** (**N**ext **A**vailable **A**ppointment) button.

Patients who have not had clinical notes entered for the day will be displayed under the **Without Clinical Notes** section.

To delete the record of any rescheduled or cancelled appointment click the **Utilities** button in the bottom left corner of the Appointment Book and click **Edit Cancels/Reschedules**.

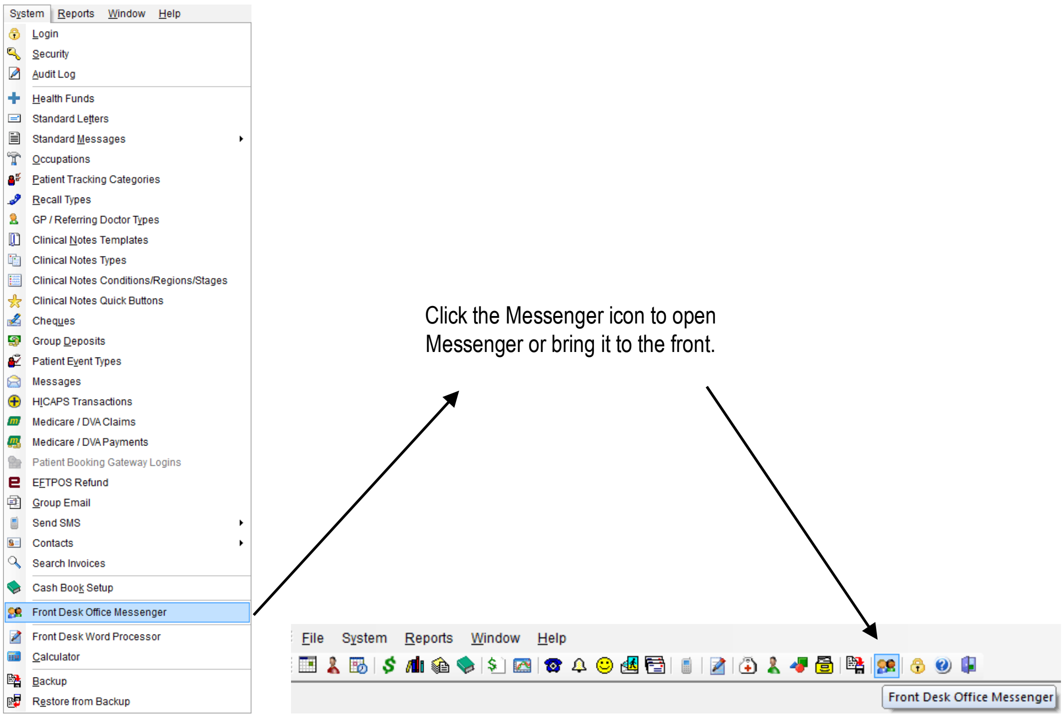
Appointment book statistics can also be viewed and printed from the **Appointments Report** located by clicking the **Reports & Utilities** button in the bottom left hand corner of the Appointment Book.

FRONT DESK OFFICE MESSENGER

Front Desk Office Messenger

Front Desk 2017 includes an office messaging system, which can be used to send messages between users or computers in your office running *Front Desk 2017*. **Note that the Front Desk Office Messenger functionality is only available in multi-user Front Desk installations**.

The **Front Desk Office Messenger** will commonly be configured to automatically open and close with the Front Desk software. Alternatively, the Messenger can be started by clicking the **Messenger** icon on the tool bar or from the **System** menu. If Messenger is already open, clicking the **Messenger** icon will bring the **Messenger** window to the front.



Generally Messenger will be running minimised and displayed as an icon in the system tray at the bottom right of the screen as below.

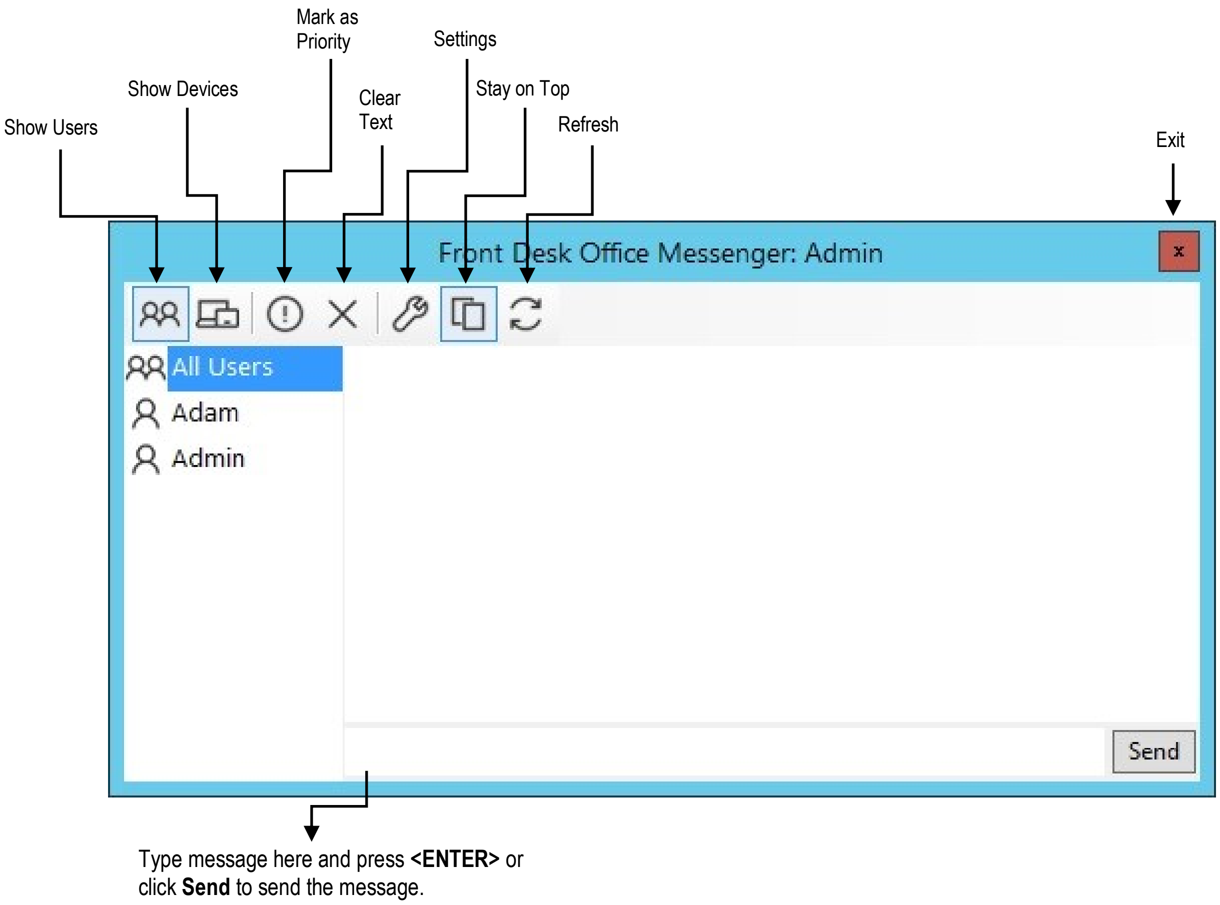
Front Desk Messenger in system tray

Users can double click this icon in the task bar or right click and select **Front Desk Office Messenger** to open the **Messenger** window.

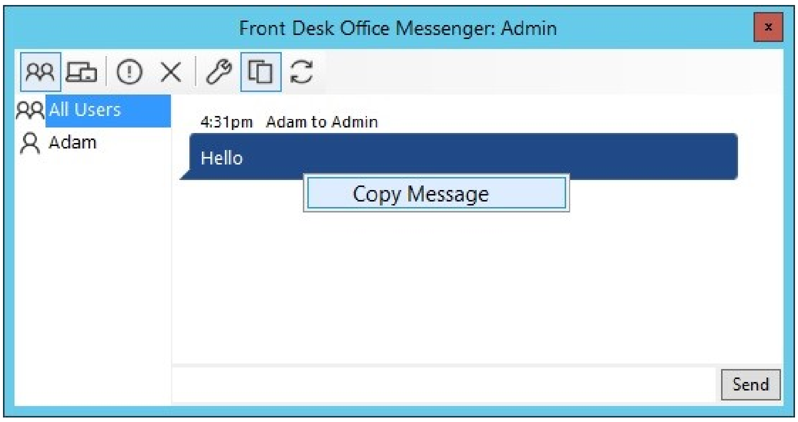
The users and computers (depending on your configuration) using the **Front Desk Office Messenger** within your office will be listed on the left hand side.

Front Desk Office Messenger

Front Desk Office Messenger



A message can be sent to an individual user/computer by selecting their username on the left before sending the message. Users can send messages to multiple people by holding the **<CTRL>** key and selecting the usernames/computer names on the right before sending.



Messages can also be copied by right-clicking on the message and selecting **Copy Message**.

FRONT DESK OFFICE MESSENGER

Front Desk Office Messenger

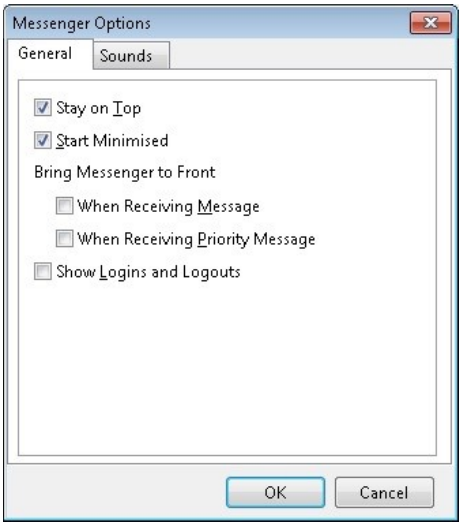
By clicking **Settings**, users can change the Messenger options.

Stay on Top will force the Messenger window to appear on top of all other program windows.

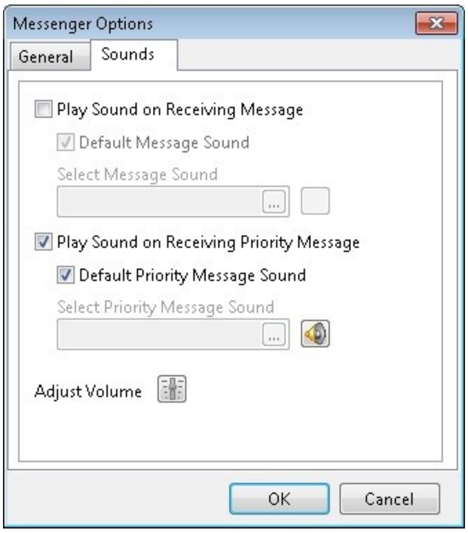
Start Minimised will set Messenger to minimise automatically when opening Front Desk.

Bring Messenger to Front When Receiving Message or **When Receiving Priority Message** will automatically bring the **Messenger** window to the front when receiving the specified message type.

Show Logins and Logouts will display when users have logged in or out of Messenger.



Users can set whether Messenger will play a sound when receiving a normal or priority messages. These sounds can also be set to any Wav sound file on your machine.



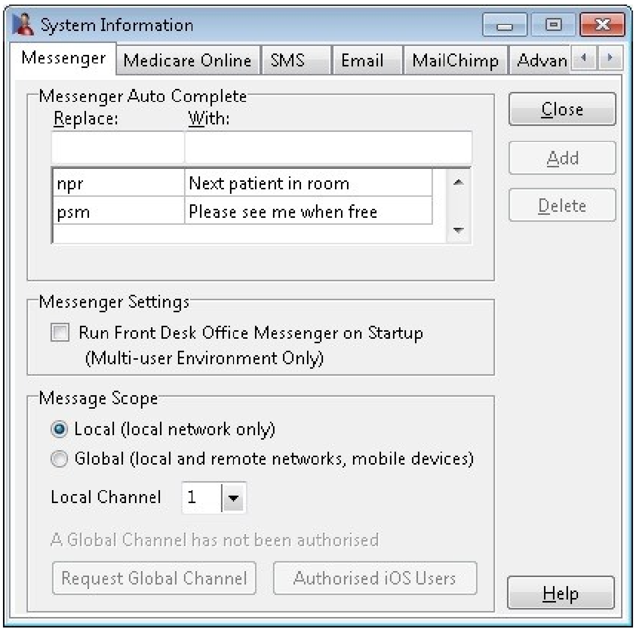
FRONT DESK OFFICE MESSENGER

Front Desk Office Messenger

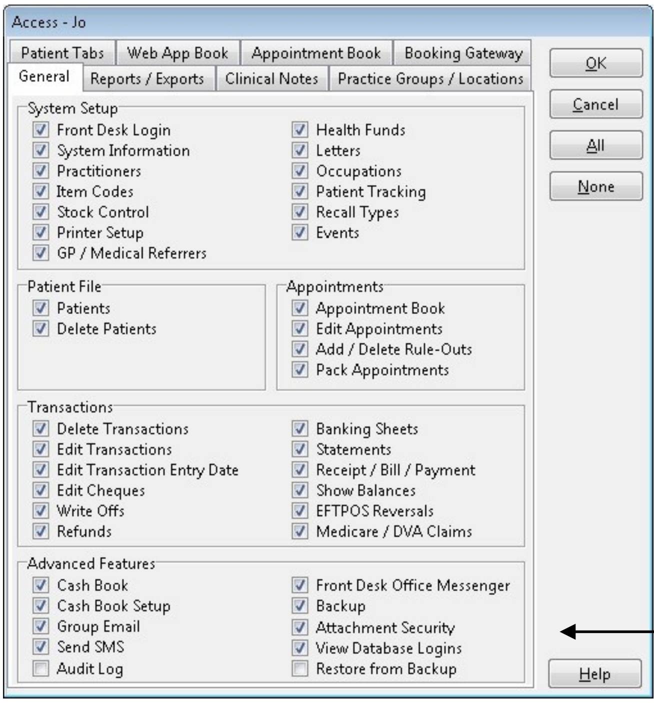
Users can choose not to **Run Front Desk Office Messenger on Startup**.

The Messenger functionality can be run in one of two modes, Local or Global using the **Message Scope** option. This setting can be found on the **Messenger** tab in **System Information**.

The **Channel** that Messenger uses can be changed allowing for the ability to have multiple messenger groups on the same network.



Access to the Front Desk Office Messenger can be restricted for certain users. When logged in as '**Admin**' select **Security** from the **System** Menu.



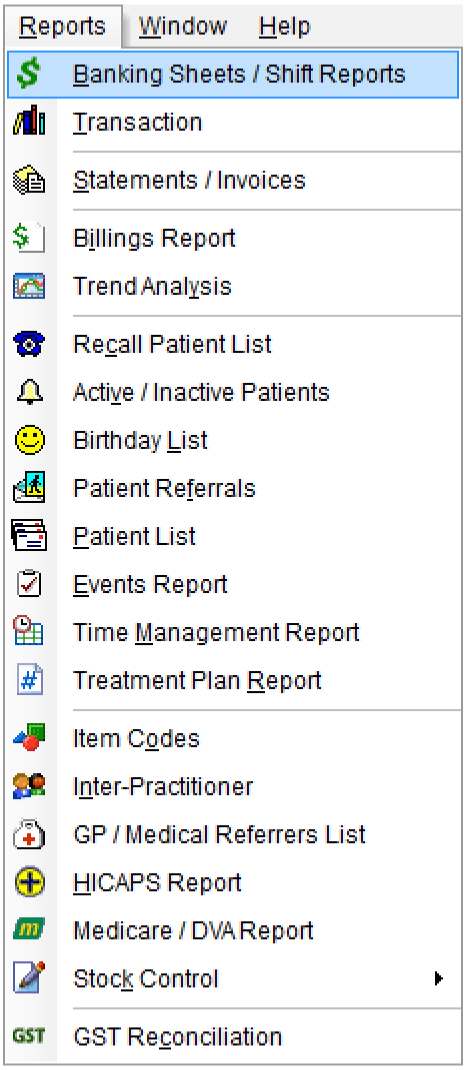
Un-check this option to restrict users' access to the **Front Desk Office Messenger**

Banking Sheets / Shift Reports

The Banking Sheets / Shift Reports function is used to generate banking sheets, transaction reports and summary reports. The periods of time for these reports may be pre-set as a clinic shift.

Click **Banking Sheets / Shift Reports** from the **Toolbar**,

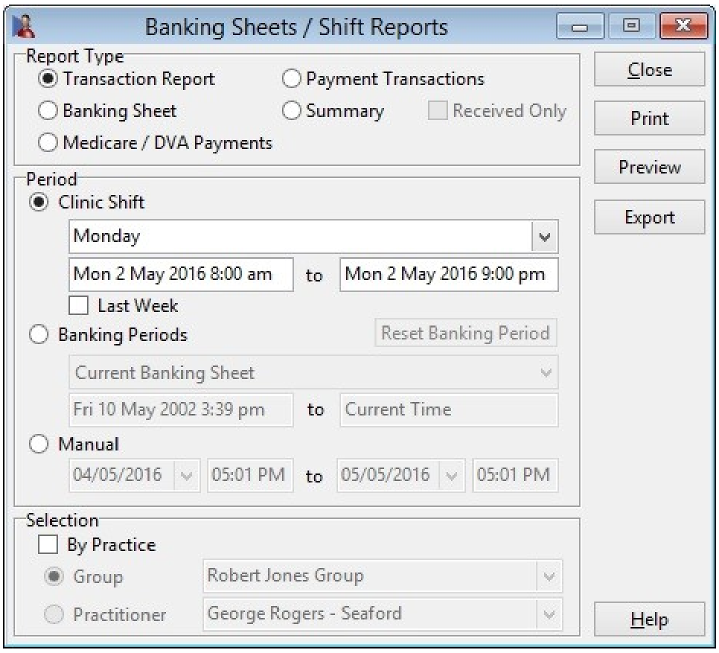
or from the **Reports** menu.



BANKING SHEETS / SHIFT REPORTS

Banking Sheets / Shift Reports

The **Banking Sheets/Shift Reports** dialog will appear.



Select the type of report from **Report Type**:

- **Transaction Report** - details all transactions within a specified period of time. Information provided on each transaction includes date and time of transaction, file number, patient name, patient's default practitioner, item code, payment type, amount billed, amount received, items paid with credit, any write offs or reductions and the total balance for the patient.

- **Payment Transactions** - details payment amounts received within a specified period of time. Information provided on each payment includes date and time of payment, practitioner, payee, item paid for, payment type and the amount paid. The total amount of all payments within the specified period of time is also detailed.

- **Banking Sheet** - details cash, credit card and cheque payments received within the specified period of time, suitable to be presented to a bank as part of your normal banking.

- **Summary** - consists of 2 sections, the first detailing the amounts billed and number of billings for each item (including the GST received), within the specified period of time and the second a summary of payments received by payment type. Note the total of the billed items in the first part of the summary report does not necessarily need to be the same as the total of payments received in the second part of the report. This report also has the option to display the **Received Only** of this report.

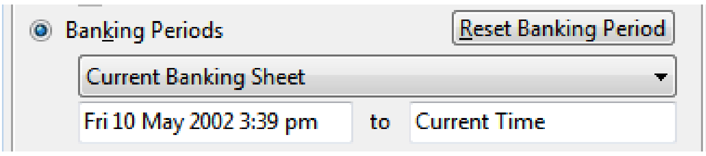
BANKING SHEETS / SHIFT REPORTS

Banking Sheets / Shift Reports

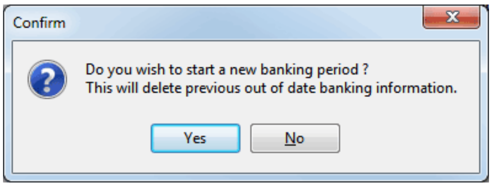
The reports on the **Banking Sheets / Shift Reports** can be produced for a particular period in 3 ways. (1) Using **Clinic Shifts**, which are pre-defined day and time periods for a report. Clinic shifts can be set up in **System Information**. (2) By **Banking Periods**, which allows you to produce a report from a previous date and time that was defined by resetting the banking period when the report was last viewed. (3) By using the **Manual** option to set from and to dates and a time period.

To set the report period to a clinic shift, select the **Clinic Shift** option and from the drop-down box select the required shift. Clinic shifts define a start and end day and time for a report.

If banking sheets are generated at the same time each week, we recommend that **Clinic Shifts** be used to define the report period. Alternatively, if banking sheets are generated on a less regular basis, then the **Banking Periods** option will be more suitable.



The **Banking Periods** option remembers the last time a banking sheet was printed. More specifically, the **From** date is set to the date that the last banking sheet was printed and the **To** date is incremented at all times to reflect the current date and time. To print the banking sheet using **Banking Periods**, simply select the **Banking Periods** option and make sure that the **Current Banking Sheet** has been selected from the drop-down box, then click **Print**. Once printing is completed the following **Confirm** dialog will be shown.



To reset the **From** date to today's date for your next **Banking Periods** report click **Yes**.

To view and print either of the previous two banking sheets, select **Previous Banking Sheet 1** or **Previous Banking Sheet 2** from the drop-down box.

If the **Clinic Shifts** and **Banking Periods** options are not suitable to define the report period, select the **Manual** option to manually specify the appropriate **From** and **To** dates.

If a banking sheet or a shift report relating to a particular practitioner or practice group is required then select the **By Practice** option and the relevant **Practice Group**, **Reporting Group** or **Practitioner**.

This report may be **Printed**, **Previewed** or **Exported** to CSV or Excel by clicking these buttons.

Banking Sheets / Shift Reports

Front Desk 2017 - Note

The type of payment received on the transaction and payment transactions report is indicated using the various codes as below.

- **C** Cash
- **Ch** Cheque
- **CC** Credit Card
- **DD** Direct Deposit
- **GD** Group Deposit
- **GCh** Group Cheque
- **PCr** Previous Credit
- **Eft** EFTPOS
- **DC** Direct Credit
- **H** HICAPS/HealthPoint
- **Med** Medicare/DVA
- * Multi Practitioner Split

Note that a balance in brackets e.g. ($346.00) indicates that the account is in credit.

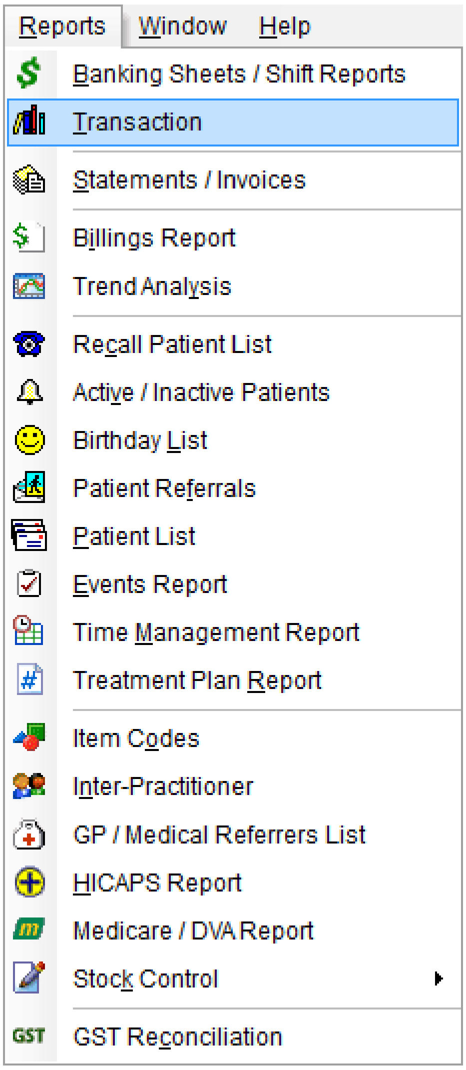
TRANSACTION LOG

Transaction Log

The Transaction function is used to list all transactions between two dates. These transactions can be generated for the entire practice, an individual practitioner, or a practice group.

Select **Transaction Log** from the **Toolbar**,

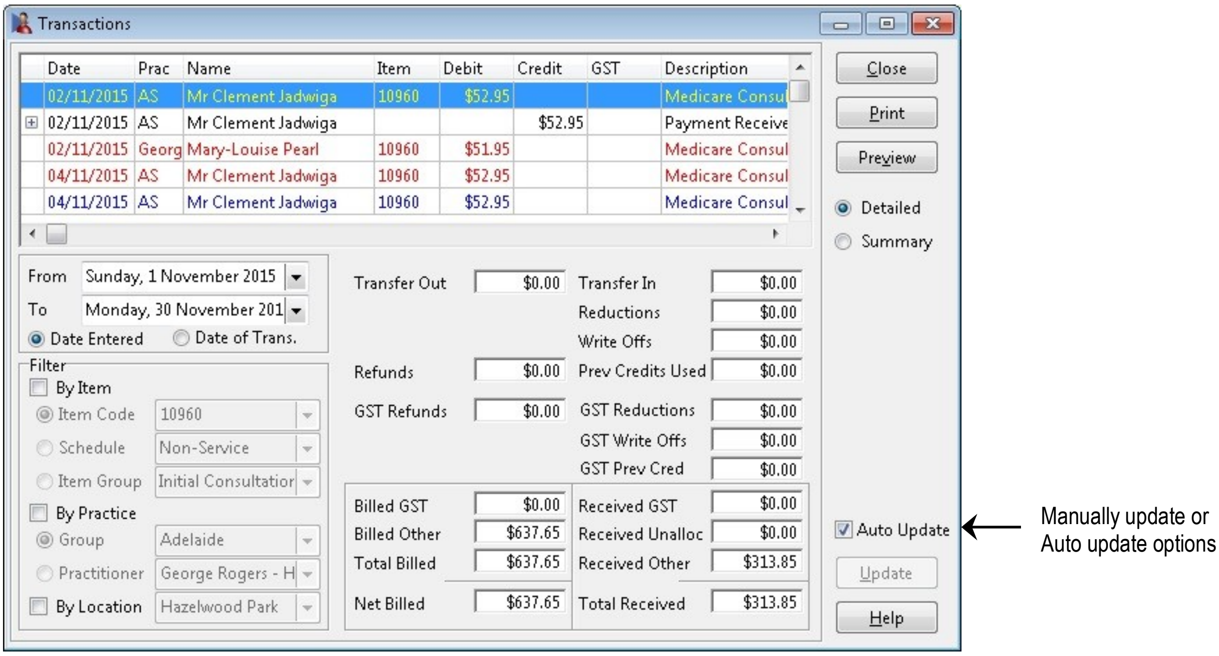
or from the **Reports** menu.



Transaction Log

Transaction Log

The **Transactions** dialog will appear.



Set the **From** and **To** dates to the desired period.

Two dates are associated with each transaction, the date that the transaction was entered into the system and the date of service (**Date of Trans.**)

Select **Date Entered** to view transactions filtered on the date they were entered into the system, or select **Date of Trans.** to view transactions filtered on date of service.

Select the **By Item** option to view transactions that relate to a particular **Item Code**, **Schedule** or **Item Group**.

If a transaction log report relating to a particular practitioner, practice group or reporting group is required then select the **By Practice** option and the relevant **Group** or **Practitioner**.

To view the details of a specific transaction double click on the transaction and the patient's file will open up to their **Transactions** tab.

To view the method of payment, click on the plus (**+**) on the payment line.

This report may be **Printed** or **Previewed** by clicking these buttons.

The Transaction Report can either show all transactions or just summary totals by selecting the **Detailed** or **Summary** options.

This report automatically updates whenever the date or any of the filter options are altered. To manually update the information after you have selected the report criteria un-tick **Auto update** and click **Update**.

TRANSACTION LOG

Transaction Log

Several transaction types are used in *Front Desk 2017*. A summary of these types follows.

Transfer In and **Transfer Out** (inter-practitioner transfers) are amounts credited to or debited from practitioners on a patient's account for internal accounting reasons. These transaction types are used to help keep track of payments paid in advance to a practitioner (appearing as credits on patient files), which are later used to pay amounts for different practitioners. This feature can be turned off by Smartsoft if you do not require this level of account recording.

Write Offs are amounts credited against billed items, which are used to clear or reduce the owing amount. This is normally used when collecting the debt is difficult.

Reductions are amounts credited to a billed item to apply a discount to the normal full fee. The full fee and the reduction amount will be shown on printed receipts and accounts. Using reductions is the preferred method for charging reduced fees to concession type patients.

Prev. Credits Used (Previous Credits) are payments made using an existing credit (also referred to as unallocated payments) on a patient’s account. No physical money is received for a payment made with an unallocated amount, but a patient’s credit amount will decrease appropriately.

GST Write Off is the GST component of an amount written off from a patient account.

GST Prev Cred. (Previous Credit) is the amount of GST paid by a patient using a credit (unallocated payments).

Refunds are the total amount of refunds for that period including GST.

GST on Refunds calculates the total amount of GST on refunded items.

Received GST is the amount of GST received.

Billed GST is the amount of GST that has been billed.

Received Unallocated is the amount of unallocated payment received. These are credits on a patient account not allocated to pay any specific item or payments made in advance.

Received Other is the received amount for a period excluding GST and **Received Unallocated** amounts.

Billed Other is billed amount for a period excluding GST billed amounts.

Total Billed is the total billed, including GST.

Net Billed is the total billed minus reductions, write-offs, GST reductions and GST write-offs.

Total Received is the total physical amounts received, including GST and any payments made using patient credits (unallocated amounts).

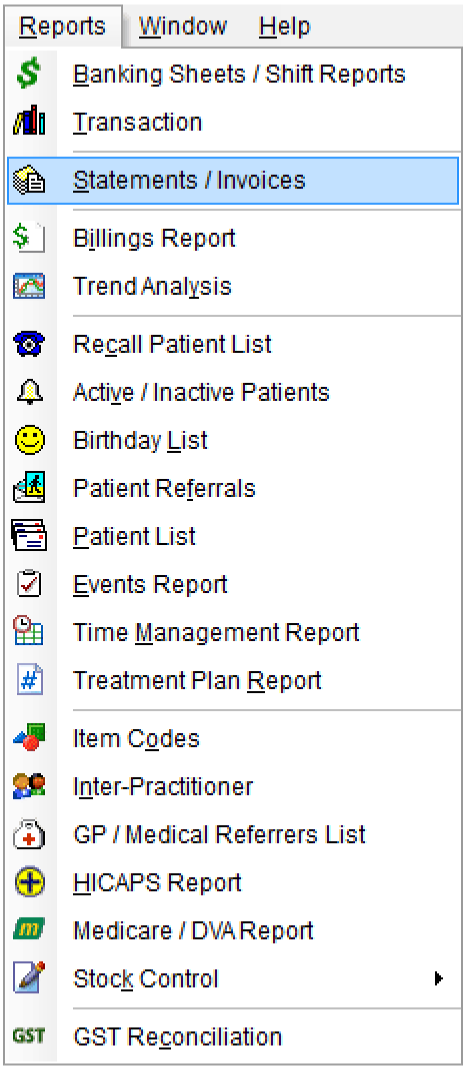
STATEMENTS / INVOICES

Statements / Invoices

The Statements / Invoices function enables bulk printing of statements and invoices.

Click **Statements / Invoices** from the **Toolbar**

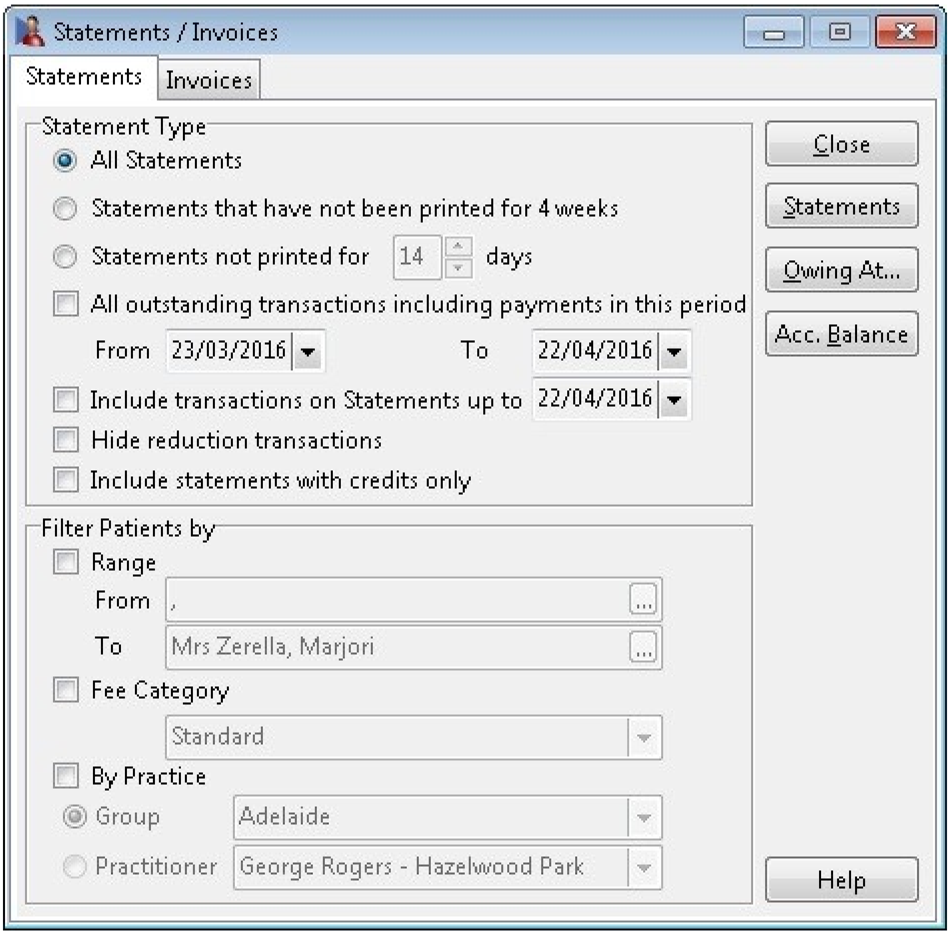
or from the **Reports** menu.



STATEMENTS / INVOICES

Statements / Invoices

The **Statements / Invoices** dialog will appear.



Statement Types

1. To print a statement for all patients who have amounts outstanding select **All Statements**.
2. To print a statement for patients who have amounts outstanding and have not received a statement in the last 4 weeks select **Statements that have not been printed for 4 weeks**.
3. To print a statement for patients who have amounts outstanding and have not received a statement for a number of days, select **Statements not printed for** and the number of days.

Statement Options

1. To list **all outstanding transactions including payments** for a period select this option and specify the **From** and **To** dates.
2. To list transactions up until a given date select the **Include transactions on Statements up to** option and set the desired date.
3. Select the third statement option to **Hide reduction transactions**.
4. Select the **Include statements with credits only** option to include patients who are in credit.

STATEMENTS / INVOICES

Statements / Invoices

The **Filter Patients by** options may be used to generate statements for a particular subset of patients.

- Select **Range**, and the **From** and **To** patients to generate statements in alphabetical groups, e.g. from Smith to Taylor.
- Select **Fee Category** to generate statements for patients of a particular fee category, e.g. all standard patients.
- Select **By Practice** to generate statements for patients who received treatment from a specific **Practitioner, Reporting Group** or **Practice Group**.

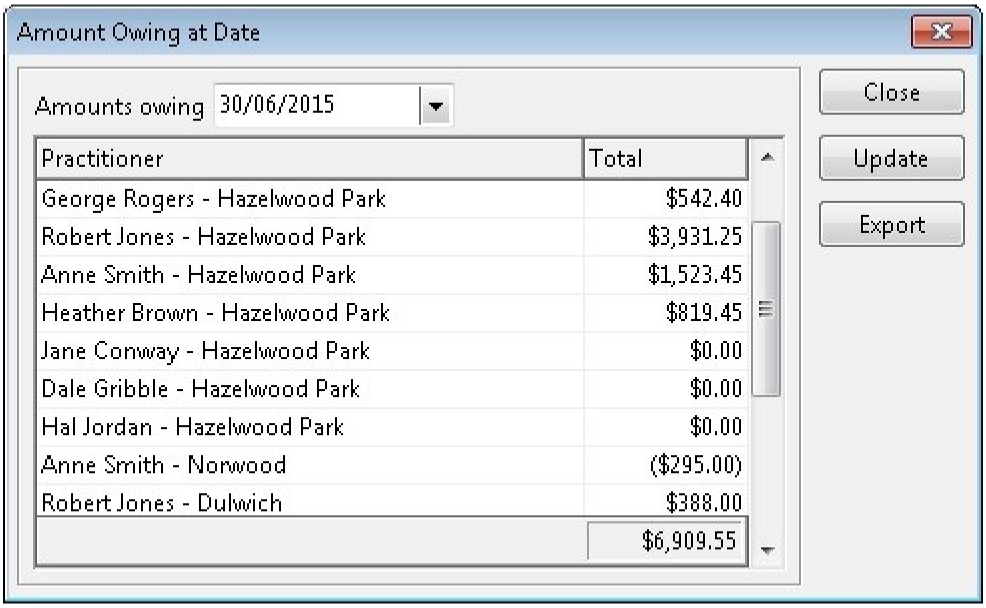
To generate a list of patient statements, click the **Statement** button. A **Statement Selection** screen will appear, to select or deselect a patient from this list, click the corresponding **Process** button. To select all patients click **All** and to deselect all patients click **None**. Note that patients with the **Hold Statement** option selected on their patient card will have the process option deselected by default. From the **Statement Selection** screen mailing labels can be produced by clicking the **Labels** button.

To print or preview a summary report of the patient statement list, click either the print or preview **Summary** button.

To print the statements click **Print**.

Amount Owing At Report

To generate a balance owing report for each practitioner, click **Owing At** on the Statements tab. Select a date from the **Amounts Owing** field. To view this information, click **Update**. A list of all practitioners with the amounts owing to them will be shown. Click **Export** to export the **Amounts Owing At Report** to CSV or Microsoft Excel®.



STATEMENTS / INVOICES

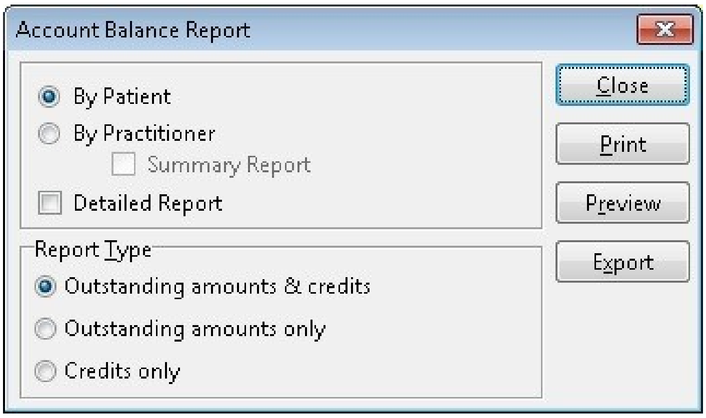
Statements / Invoices

Account Balance Report

To generate an account balance report, click **Acc. Balance** on the **Statements** tab. There are three different **Report Types** available:

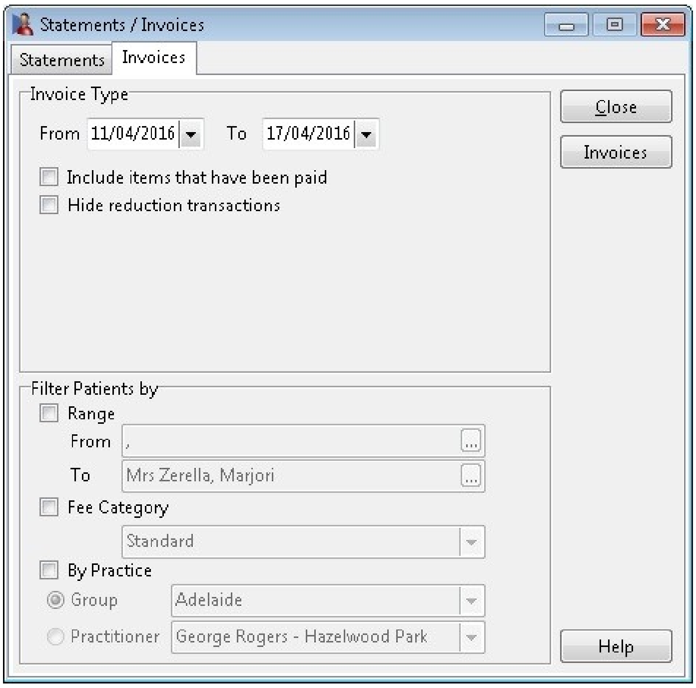
- Outstanding amounts & credits
- Outstanding amounts only
- Credits only

This report may be **Printed**, **Previewed** or **Exported** to CSV or Excel by clicking these buttons.



Invoices

To generate invoices, select the **Invoices** tab and select the desired period. You have the option to **Include items that have been paid** or to **Hide reduction transactions**. The filter options for invoices are the same as with statements.



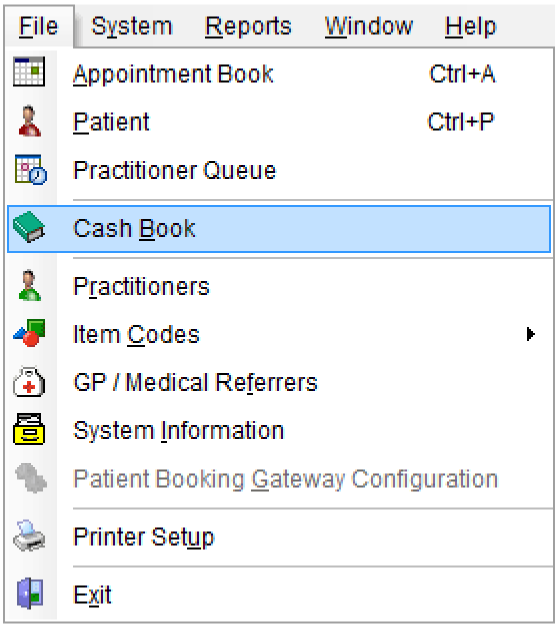
CASH BOOK

Cash Book Setup

The Cash Book function is a simple way to record outgoing expenses.

Click **Cash Book** from the **Toolbar**

or from the **File** menu.

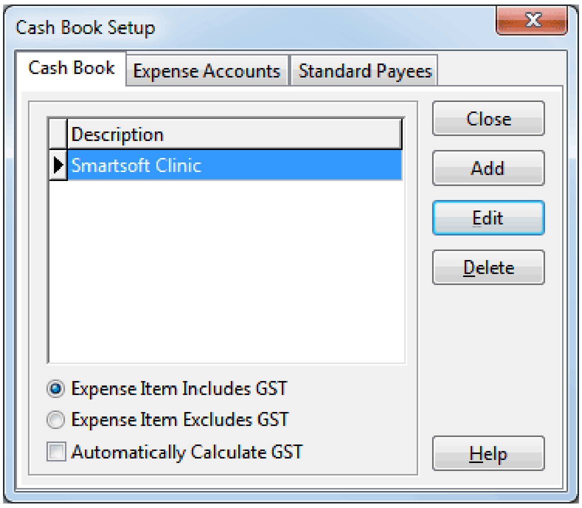


When starting this option for the first time a dialog appears informing you that no cash book has been set up. Click **Yes** to set up a cash book now.

Cash Book

Cash Book Setup

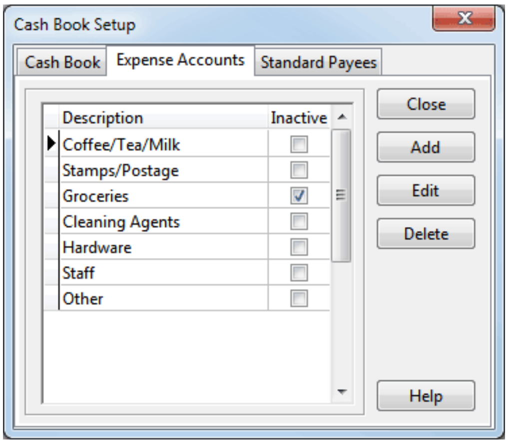
The **Cash Book Setup** dialog appears.



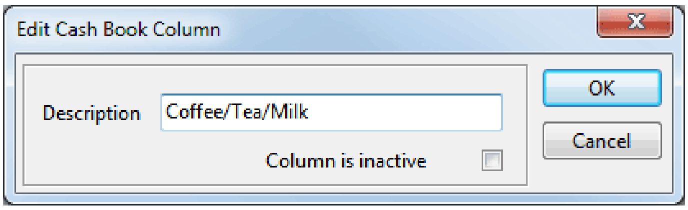
You may wish to have more than one cash book for the practice. Click **Add** to create a new cash book, enter a **Description** and click **OK**. Click **Edit** to rename a cash book and **Delete** to remove one. Keep in mind that a cash book can only be deleted if there are no entries associated with it.

Select whether you want to include or exclude GST in the total of the expense items. Additionally, the cash book can be set to **Automatically Calculate GST**.

Select the **Expense Accounts** tab and click **Add** to enter your expenses.



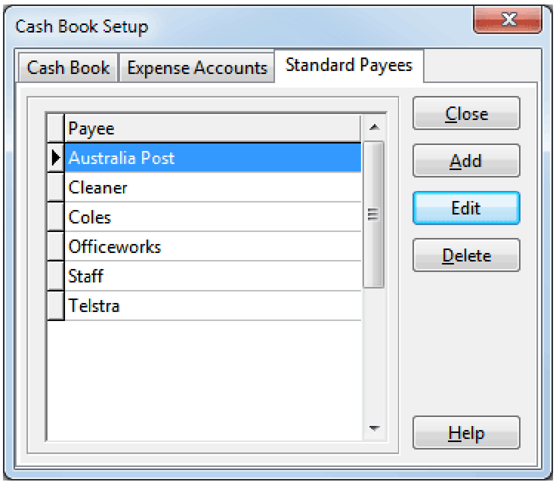
If an expense no longer applies to the clinic you can make it **Inactive** by selecting the item, clicking **Edit** then ticking the **Column is Inactive** checkbox.



Cash Book

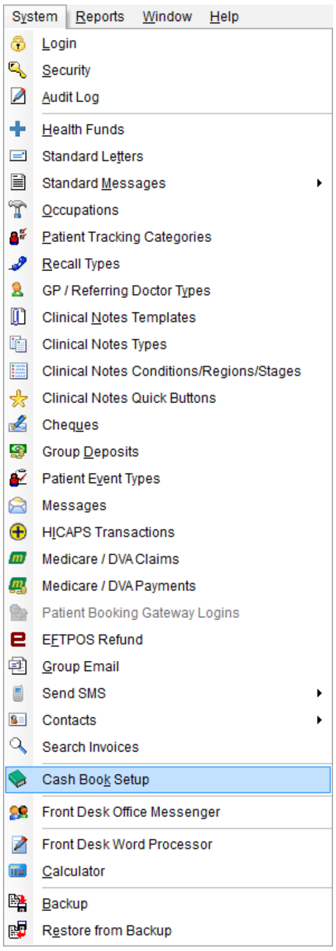
Cash Book Setup

Select the **Standard Payees** tab and **Add** any entity that is paid on a regular basis, e.g. Australia Post.



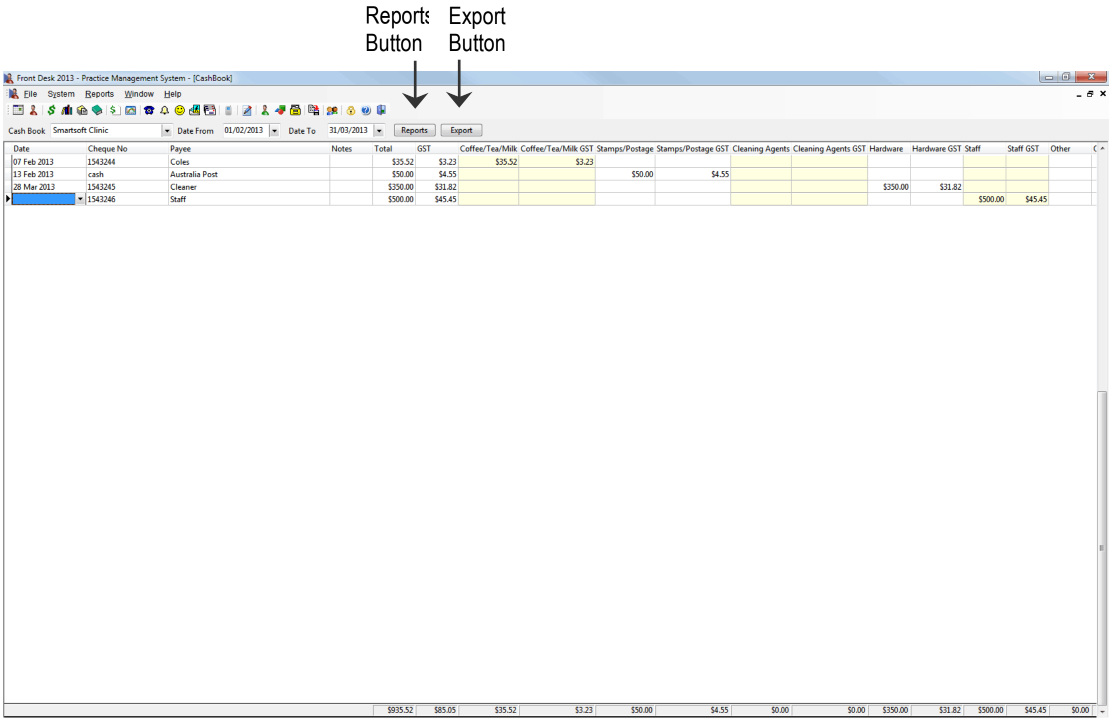
When the cash book setup is complete, click **Close** to save your changes.

To access the Cash Book Setup again, it can be found on the **System** menu.



Cash Book

To view the Cash Book, click **Cash Book** from the **Toolbar** (as above).



Your cash book will sort entries by date and generate the next cheque or reference number automatically. To move through the cashbook use the **Tab** key on your keyboard. To move horizontally and/or vertically use the arrows on your keyboard.

To delete a record, select that record and press the control **<CTRL>** and **<DELETE>** keys on the keyboard simultaneously.

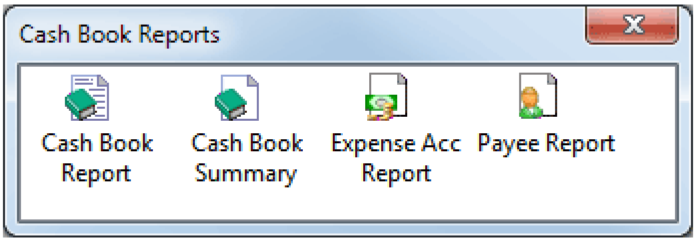
To add information regarding an entry into the **Notes** field double click on that field.

Note that if **Automatically Calculate GST** has not been enabled in **Cash Book Setup**, GST amounts should be entered in the **GST** column.

CASH BOOK

Cash Book

To view and print reports relevant to the Cash Book click the **Reports** button at the top of the cashbook.



The following reports may be viewed.

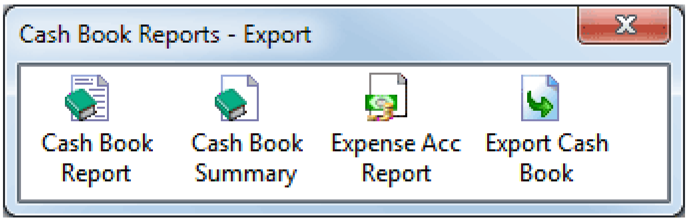
Cash Book Report
Details all entries for the specified period of time.

Cash Book Summary
Details the totals of Expense Accounts for the specified period of time.

Expense Account Report
To view the entries regarding a particular Expense Account, select a cell within that accounts column and then select this report.

Payee Report
Details the totals for the Payees for the specified period of time.

To export these reports to CSV or to a Microsoft Excel® spreadsheet, click the **Export** button.



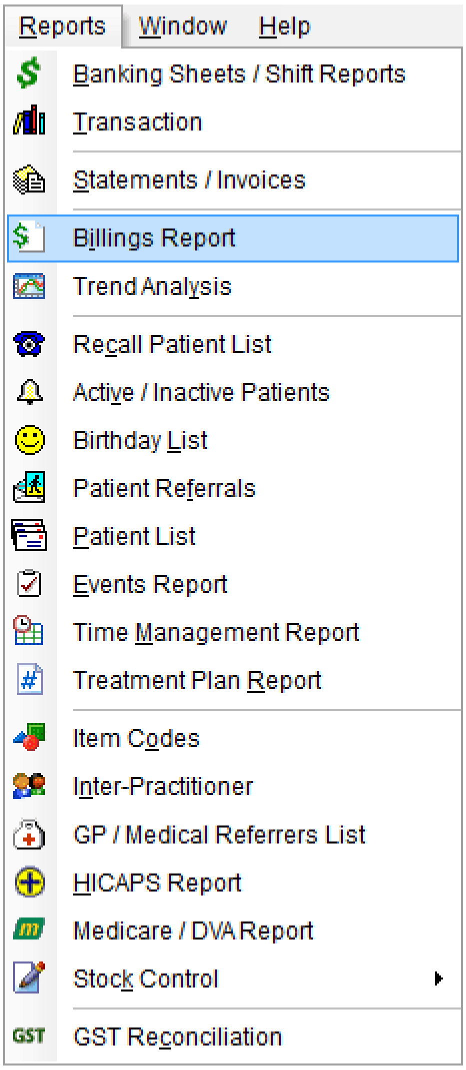
BILLINGS REPORT

Billings Report

The Billings Report function provides billing information for a specified period of time.

Click **Billings Report** from the **Toolbar**

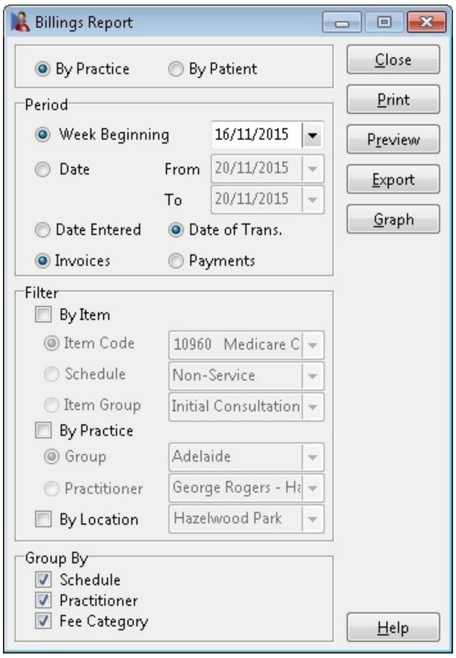
or from the **Reports** menu.



BILLINGS REPORT

Billings Report

The **Billings Report** dialog will appear.



The **Billings Report** can be produced to show billings by **By Practice** or **By Patient**.

Select either the **Week Beginning** option to generate a weekly report or select the **Date** option to specify a particular date range.

By default the **Date of Trans.** (date of service) option will be selected. If you require the report by **Date Entered** select this option.

By default the Billings Report will be generated by **Invoices**. If you require a report based on payments received, select the **Payments** option.

Select the **By Item** option to view transactions that relate to a particular **Item Code**, **Schedule** or **Item Group**.

If a billings report relating to a particular practitioner, practice group or reporting group is required then select the **By Practice** option and the relevant **Group** or **Practitioner**.

For practices with **Multiple Locations** enabled, select **By Location** to filter the transactions made at a specific location.

Grouping allows you to view the report **By Schedule**, **By Practitioner** or **By Fee Category** or a combination of these options.

This report may be **Printed** or **Previewed** by clicking these buttons.

To export to CSV or Microsoft Excel® click **Export**.

Click **Graph** to view the *Billings Report* as a pie chart.

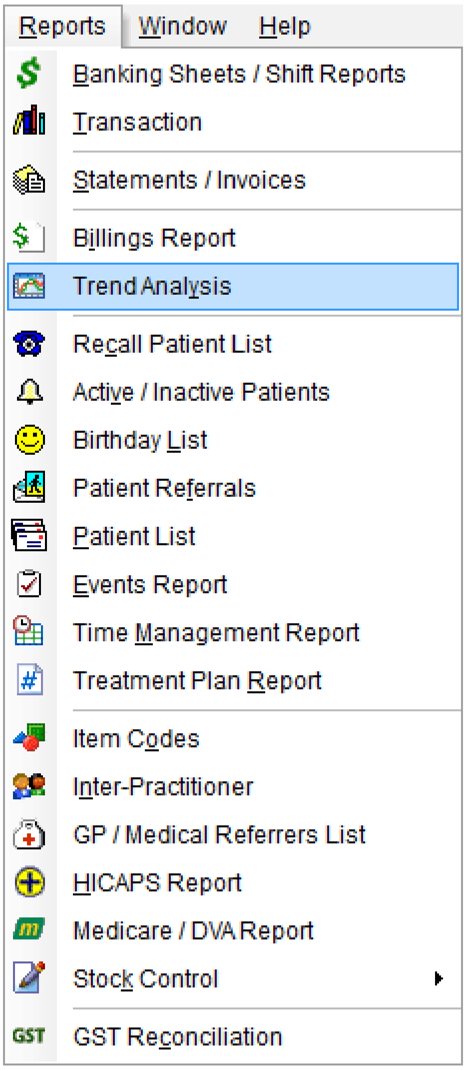
TREND ANALYSIS

Trend Analysis

The *Trend Analysis* graph provides a flexible and easy method to view a practice's transaction trends over time.

Click **Trend Analysis** from the **Toolbar**

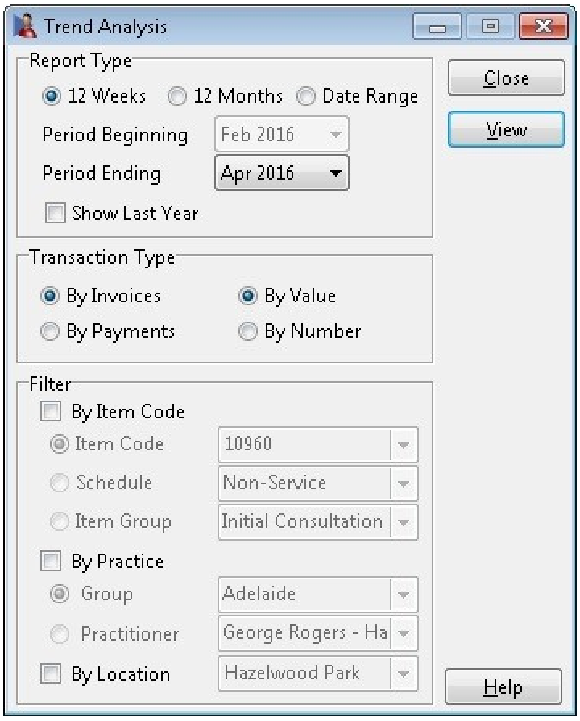
or from the **Reports** menu.



TREND ANALYSIS

Trend Analysis

The **Trend Analysis** dialog will appear.



The period for the graph can be for **12 weeks**, **12 months** or a manual **Date Range** can be selected.

If **Date Range** has been selected, **Period Beginning** and **Period Ending** dates will need to be selected, otherwise only a **Period Ending** date is required.

Check the **Show Last Year** option to compare this graph with the previous year.

The trend graph is capable of displaying trends in credit and debit.

- Select the **By Debit** and **By Value** options to display *amounts* billed for the period.
- Select the **By Debit** and **By Number** options to display the *number* of billings for the period.
- Select the **By Credit** option to display *amounts* paid for the period.

Select the **By Item** option to view a trend graph relating to a particular **Item Code**, **Schedule** or **Item Group**.

For practices with **Multiple Locations** enabled, select **By Location** to filter to transactions made at a specific location.

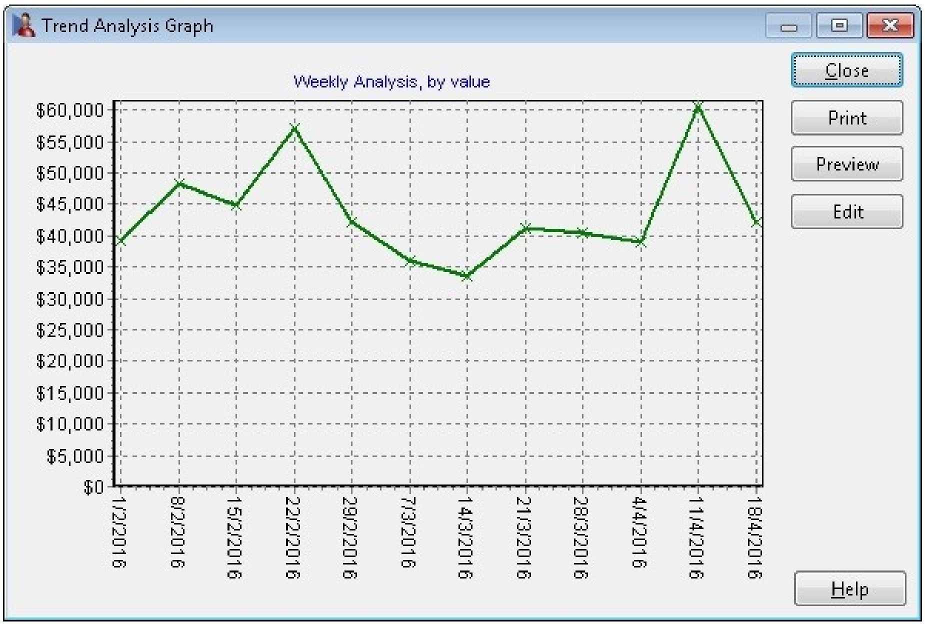
If a billings report relating to a particular practitioner, practice group or reporting group is required then select the **By Practice** option and the relevant **Practice Group, Reporting Group** or **Practitioner**.

TREND ANALYSIS

Trend Analysis

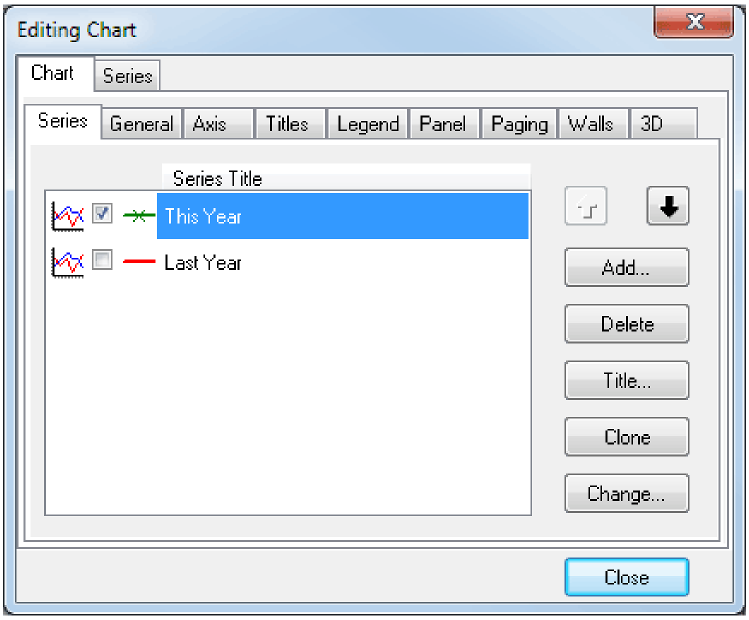
To prepare and view the trend graph click **View**.

A trend analysis graph will be shown.



This graph may be **Printed** or **Previewed** by clicking these buttons.

You can edit the graph by clicking **Edit**. This allows you to change the type of graph, etc.

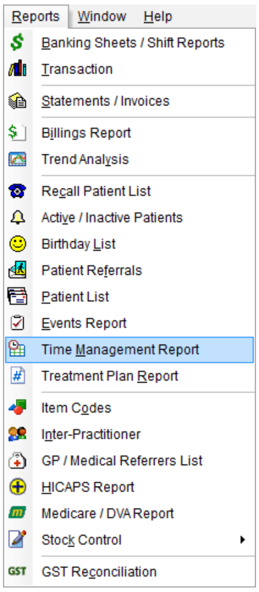


TIME MANAGEMENT REPORT

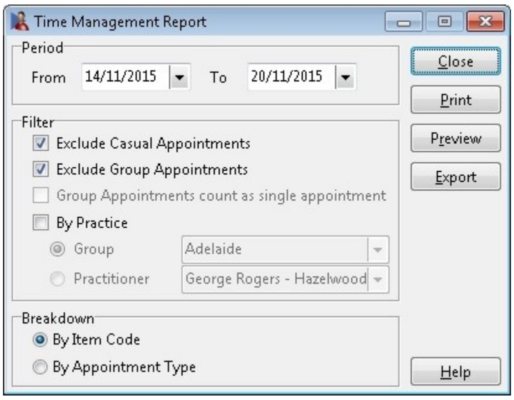
Time Management Report

The **Time Management Report** generates a report for practitioners to calculate the total amount of time spent consulting by item codes or appointment types.

Select **Time Management Report** from the **Reports** menu.



Select the date range you wish to view.



If a time management report is required for a particular practice group, reporting group or practitioner, select **By Practice** and the relevant **Group** or **Practitioner**.

Group Appointments and Casual Appointments may be excluded by checking **Exclude Group Appointments** and **Exclude Casual Appointments** respectively. If you want to include Group Appointments they can be counted as a single appointment or individual appointments by checking or unchecking **Group Appointments count as single appointment**.

From the **Breakdown** section, select how you wish to view the report - **By Item Code** or **By Appointment Type**.

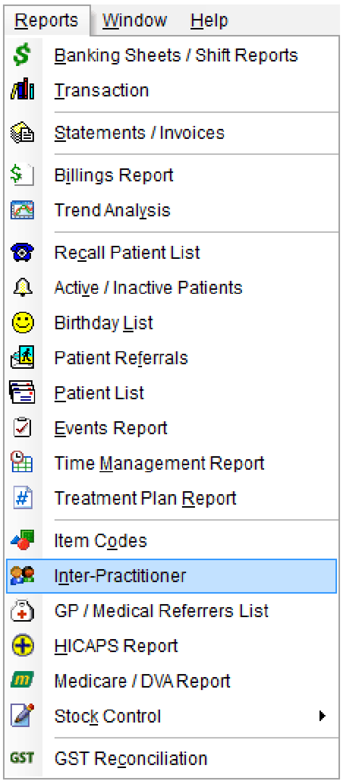
This report may be **Exported**, **Printed** or **Previewed** by clicking these buttons.

INTER-PRACTITIONER

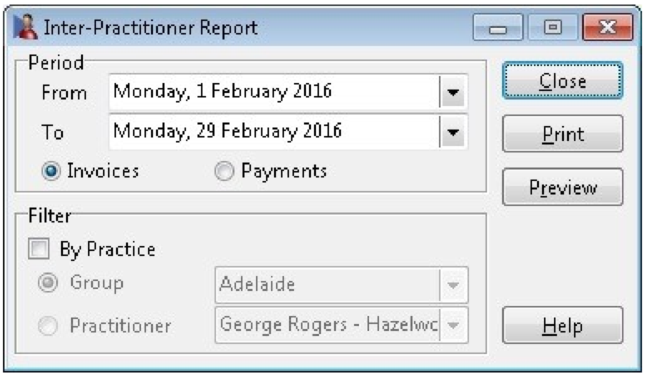
Inter-Practitioner

The *Inter-Practitioner* report provides details of practitioners who have provided services for other practitioners' patients. This report can be used when fees are paid to a practitioner when another practitioner consults their patients.

Select **Inter-Practitioner** from the **Reports** menu.



The **Inter-Practitioner Report** dialog will appear.



Set the period that you require for this report by setting the **From** and **To** date.

By default the Inter-Practitioner Report will be generated by **Invoices**. If you require a report based on payments received, select the **Payments** option.

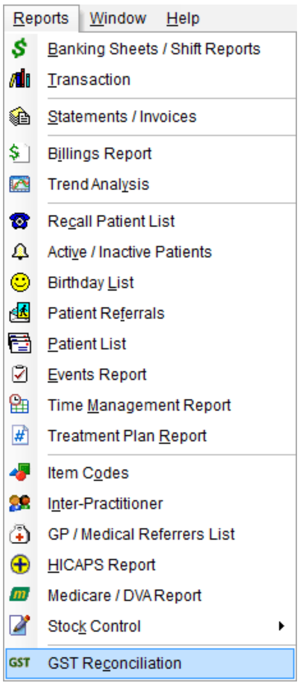
If an inter-practitioner report relating to a particular practitioner or practice group is required then select **By Practice** and the relevant **Practice Group** or **Practitioner**.

This report may be **Printed** or **Previewed** by clicking these buttons.

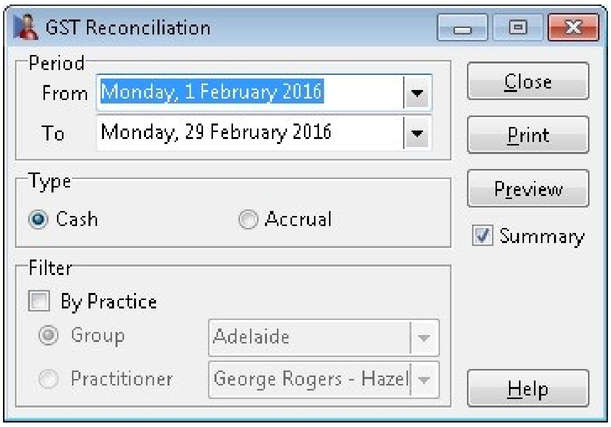
GST Reconciliation

GST Reconciliation

Select **GST Reconciliation** from the **Reports** menu.



The **GST Reconciliation** dialog will appear.



Set the period that you require for this report by setting the **From** and **To** dates.

The report can be generated for both **Cash** and **Accrual** accounting. If you are unaware of which option to choose please check with your accountant.

If a **GST Reconciliation** report relating to a particular practitioner or practice group is required then select **By Practice** and the relevant **Practice Group**, **Reporting Group** or **Practitioner**.

If a detailed report is required, un-tick the **Summary** option.

This report may be **Printed** or **Previewed** by clicking these buttons.

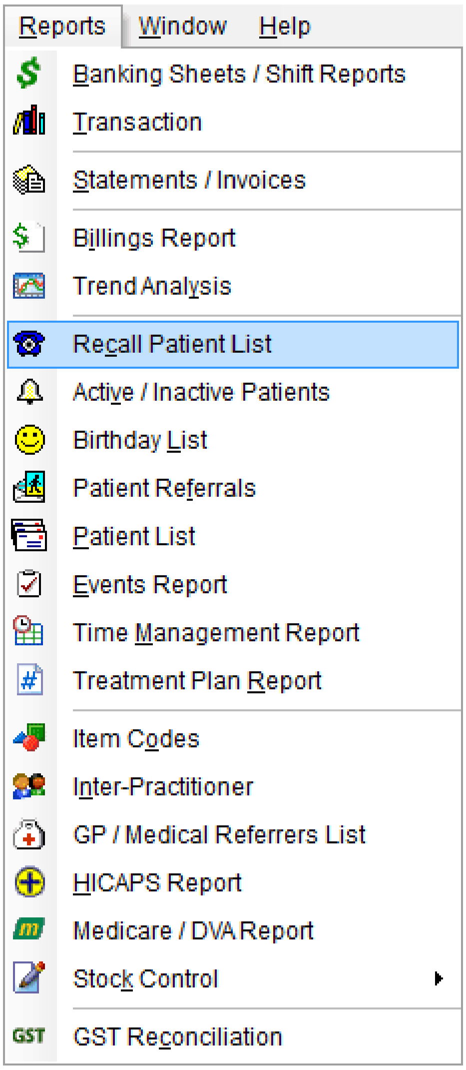
RECALL PATIENT LIST

Recall Patient List

The Recall Patient List generates a list of patients whose recall dates fall within the specified period of time.

Click **Recall Patient List** from the **Toolbar**

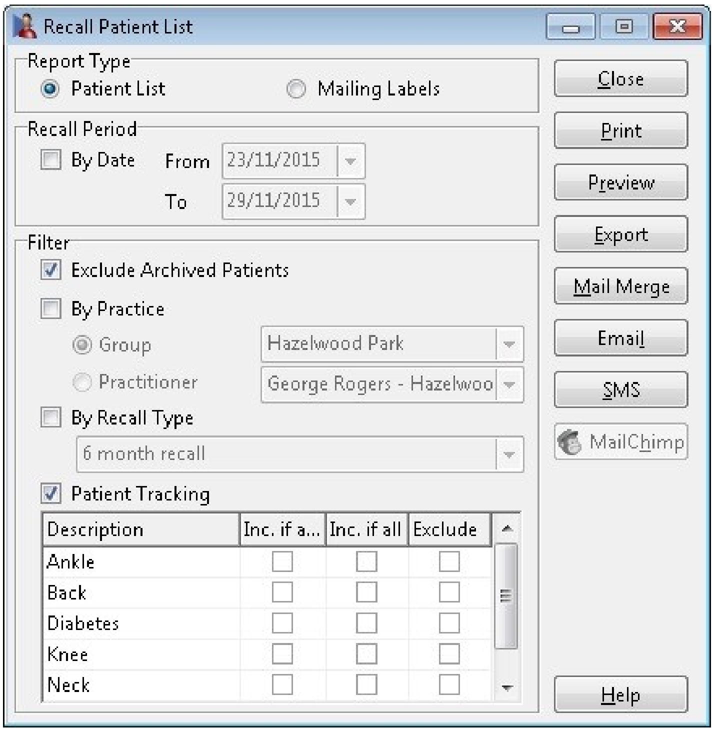
or from the **Reports** menu.



RECALL PATIENT LIST

Recall Patient List

The **Recall Patient List** dialog will appear.



To generate a patient list or mailing labels select the respective **Patient List** or **Mailing Labels** option.

To list all patients whose recall date falls within a specified period, select **By Date** and enter the appropriate **From** and **To** dates.

Select **Exclude Archived Patients** to list only those patients who have not been archived under the **General** tab in the patient file.

If a recall list relating to a particular practitioner or practice group is required select **By Practice** and the relevant **Practice Group**, **Reporting Group** or **Practitioner**.

Select **By Recall Type** to list only those patients who have a particular type of recall.

Select **Patient Tracking** to list only those patients who have a particular tracking category set in their patient file.

- **Include if any** will generate a report of those patients who have *any* of the selected tracking categories set in their file.
- **Include if all** will generate a report of those patients who have *all* of the selected tracking categories set in their file.
- **Exclude** will generate a report *excluding* those patients who have the selected tracking categories set in their file.

RECALL PATIENT LIST

Recall Patient List

To export the Recall Patient list to CSV or Microsoft Excel® click **Export**; this can be used to edit the patient list or for a mail merge. The **CSV (without Header)** option may be used to import data into other programs.

Click **Mail Merge** to perform a mail merge using the **Front Desk Word Processor** or Microsoft Word®.

Click **Email** to send an email to those patients with an email address.

Click **SMS** to send SMS messages to those patients with a mobile number.

Front Desk 2017 - Note

Front Desk 2017 - Practice Management System supports 3 export formats:

- **CSV (with Header)**
- **CSV (without Header)**
- **Microsoft Excel®**

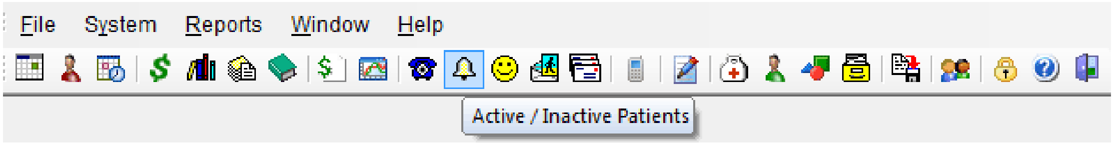
We recommend selecting the **CSV (with header)** option when exporting to Microsoft Word®. Depending on the version of Microsoft Word® there are times when this format is not suitable. Please select one of the other formats in this situation, or use the **Front Desk Word Processor** for creating mail merges instead.

ACTIVE / INACTIVE PATIENTS

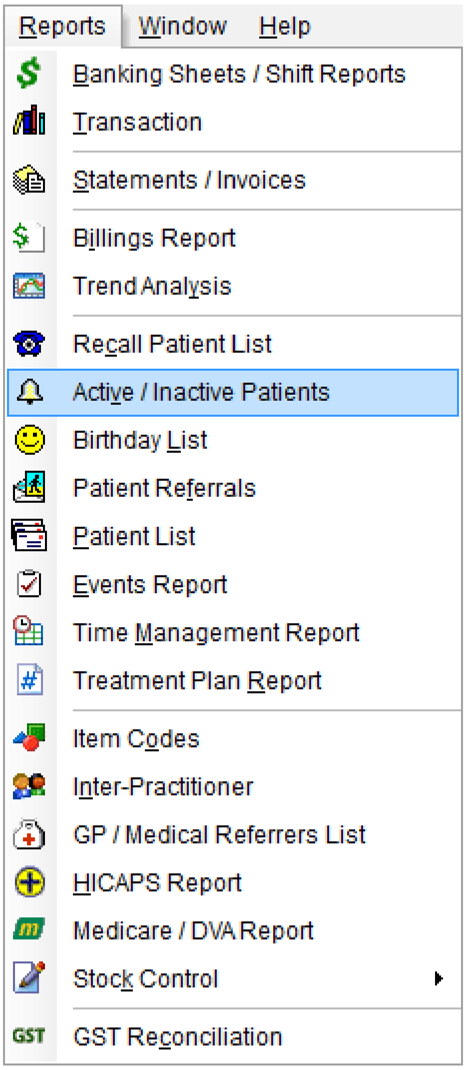
Active / Inactive Patients

The **Active / Inactive Patients** report generates a list of patients who either **have** been to the practice within a specified period of time (*Active*) or **have not** been to the practice within a specified period of time (*Inactive*).

Click **Active / Inactive Patients** on the **Toolbar**

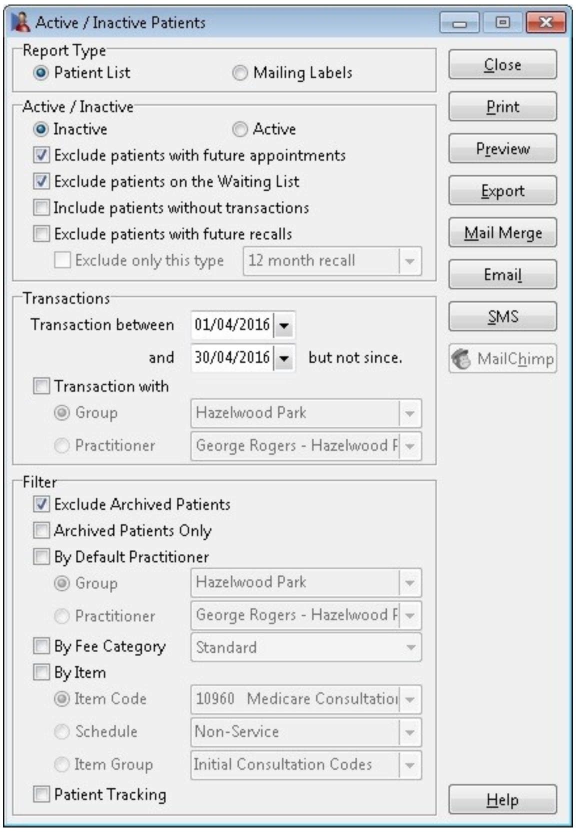


or from the **Reports** menu.



Active / Inactive Patients

The **Active / Inactive Patients** dialog will appear.



To generate a patient list or mailing labels either select **Patient List** or **Mailing Labels**.

To list patients who have not been to the clinic for a period of time, select the **Inactive** option.

Select **exclude patients with future appointments** if you don't wish to include patients who have made a future appointment.

Select **exclude patients on the Waiting List** if you don't wish to include patients currently on the Waiting List.

Select **include patients without transactions** to include those patients who may not have a transaction in the system.

Select **exclude patients with future recalls** to exclude those patients who have a future recall in the system. Selecting the **exclude only this type** option allows users to exclude a specific recall type.

The **Inactive** patient report can be used to find patients who previously attended the practice but have not returned for a period of time. For example, to list all patients who have been to the practice in the last 2 years, but not in the last 6 months, set the 1st date in the **Transaction between** date range to a date 2 years prior to the current date and the 2nd date to 6 months prior to the current date.

ACTIVE / INACTIVE PATIENTS

Active / Inactive Patients

To list patients who have been to the practice during a specified period, select the **Active** option and enter the **From** and **To** dates for the required period.

Select **Exclude Archived Patients** to list only those patients that have not been archived under the **General** tab in the patient file.

This report can be filtered by the practitioner / practice group / reporting group the patient has had a **Transaction with** or by the patient's **Default Practitioner**.

If a report relating to a particular fee category is required then select the **By Fee Category** option and the relevant fee category.

Select **By Item** to list only those patients who have been billed under a particular **Item Code**, **Schedule** or **Item Group**.

Select **Patient Tracking** to list only those patients who have a particular tracking category set in their patient file.

- **Include if any** will generate a report of those patients who have *any* of the selected tracking categories set in their file.

- **Include if all** will generate a report of those patients who have all of the selected tracking categories set in their file.

- **Exclude** will generate a report *excluding* those patients who have the selected tracking categories set in their file.

This report may be **Printed** or **Previewed** by clicking these buttons.

To export the Active / Inactive Patient list to CSV or Microsoft Excel® click **Export**, this can be used to edit the patient list or for a mail merge.

Click **Mail Merge** to perform a mail merge using the **Front Desk Word Processor** or Microsoft Word®.

Click **Email** to send an email to those patients with an email address.

Click **SMS** to send SMS messages to those patients with a mobile number.

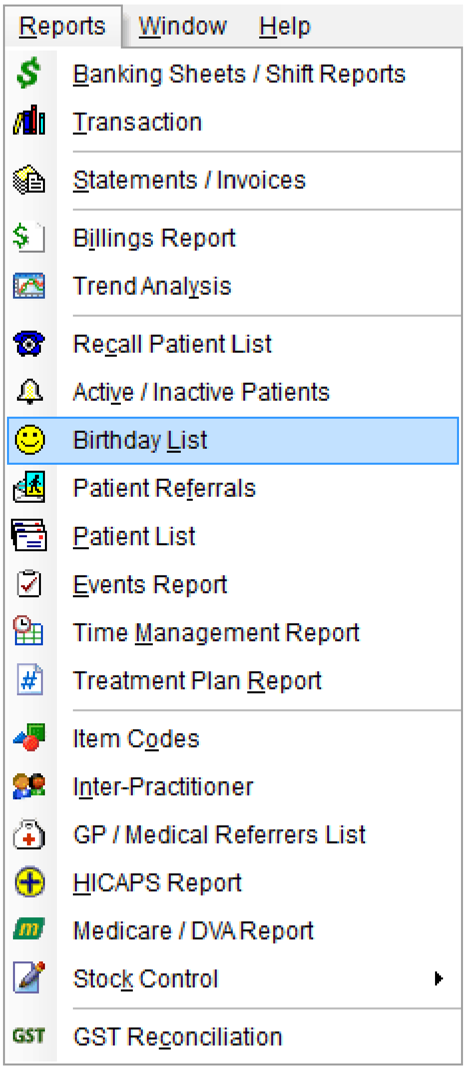
Birthday List

Birthday List

The Birthday List generates a list of patients whose birthday falls between two selected dates.

Click **Birthday List** on the **Toolbar**

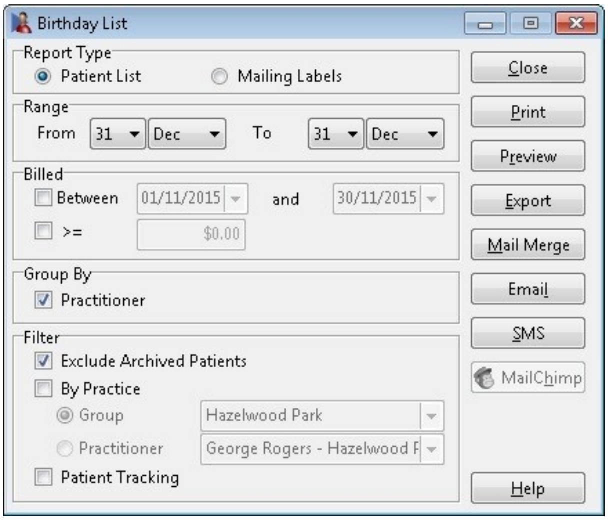
or from the **Reports** menu.



BIRTHDAY LIST

Birthday List

The **Birthday List** dialog will appear.



To generate a patient list or mailing labels select the **Patient List** or **Mailing Labels** option. Enter the **From** and **To** dates to specify the birthday date **Range**.

Select the **Between** option to list those patients who have been **Billed** within a specified period of time. The **>=** option lists the patients who have been billed an amount greater than or equal to the amount entered during the billed period.

Select **Exclude Archived Patients** to list only those patients who have not been archived under the **General** tab in the patient file.

To group the report by practitioner, check the **Practitioner** option under **Group By**. If a birthday list relating to a particular practitioner or practice group is required then select the **By Practice** option and the relevant **Practice Group**, **Reporting Group** or **Practitioner**.

Select **Patient Tracking** to list only those patients who have a particular tracking category set in their patient file.

- **Include if any** will generate a report of those patients who have *any* of the selected tracking categories set in their file.
- **Include if all** will generate a report of those patients who have all of the selected tracking categories set in their file.
- **Exclude** will generate a report *excluding* those patients who have the selected tracking categories set in their file.

This report may be **Printed** or **Previewed** by clicking these buttons.

To export the Birthday List to CSV or Microsoft Excel® click **Export**. This can be used to edit the patient list or for a mail merge.

Click **Mail Merge** to perform a mail merge using the Front Desk Word Processor or Microsoft Word®.

Click **Email** to send emails to those patients with an email address.

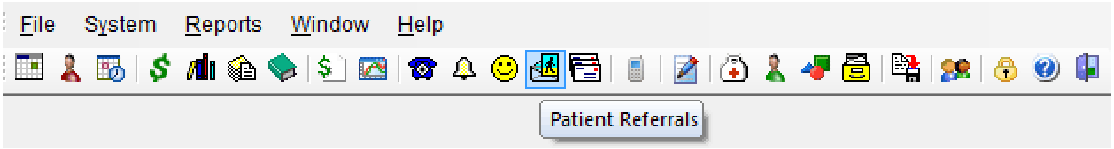
Click **SMS** to send SMS messages to those patients with a mobile number.

Patient Referrals

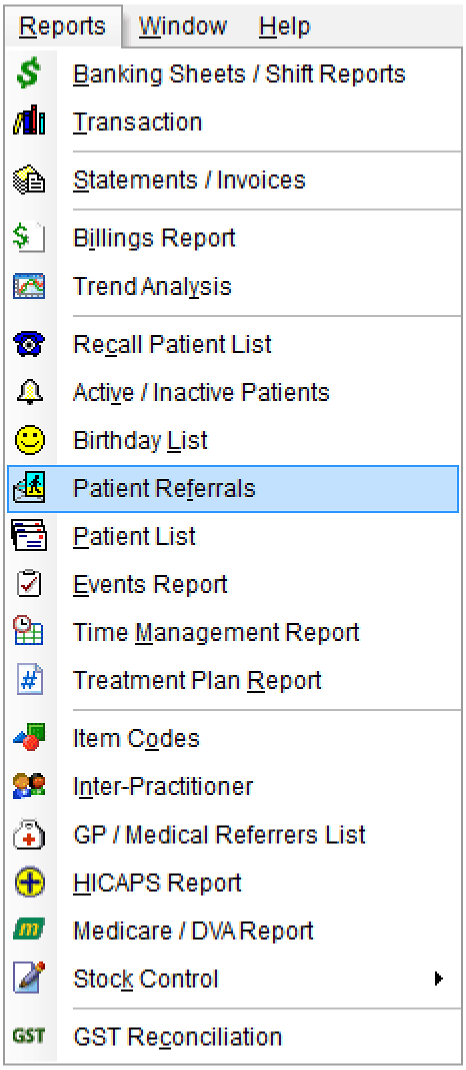
Patient Referrals

The Patient Referrals report generates a list of patients or entities that have referred a patient within a specified period of time and displays the income generated for each referred patient.

Click **Patient Referrals** on the **Toolbar**



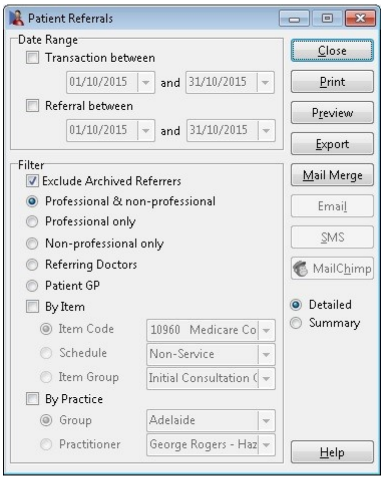
or from the **Reports** menu.



The **Patient Referrals** dialog will appear.

PATIENT REFERRALS

Patient Referrals



To track patients who have been billed in a period of time use the **Transaction between** option. Select the **Referral between** option to track patients with a referral entered in a certain period. Leave **both** unselected to list all referrers.

Select **Exclude Archived Patients** to list only those patients who have not been archived under the **General** tab in the patient file.

Select the type of referral list you require - **Professional** referrers, **non-professional** referrers, or both. These options are set under the **Notes** tab in the patient file.

Select **Referring Doctors** to list GP/Medical referrer information listed in the Ref Dr. field of the **Billing Details** tab of the Patient file. If Medical Specialist Referrals is enabled this option is called **Medical Referrers** and takes its information from the **Medical Referrals** tab of the Patient file.

Select **Patient GP** to list the GP/Medical Referrer information on the **Additional** tab of the Patient file.

If a Patient Referrals report relating to a particular practitioner or practice group is required select **By Practice** and the relevant **Group** or **Practitioner**.

This report may be **Printed** or **Previewed** by clicking the respective buttons.

To export the Patient Referrals list to CSV or Microsoft Excel® click **Export**. This can be used to edit the patient list or for a mail merge.

Click **Mail Merge** to perform a mail merge using the **Front Desk Word Processor** or Microsoft Word®.

Click **Email** to send emails to those patients with an email address.

Click **SMS** to send SMS messages to those patients with a mobile number.

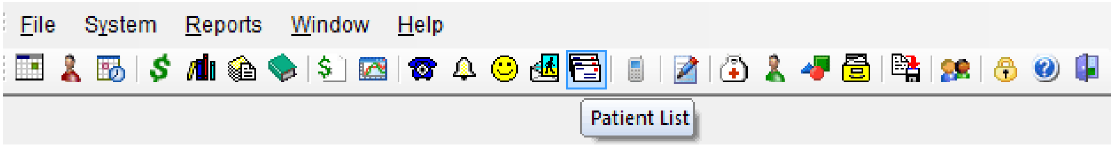
This report is viewable in a **Summary** or **Detailed** format. Select **Summary** to view a report of each referrer and the total generated by these referrals. To include a list of the patients referred by each referrer, select the **Detailed** option.

Patient List

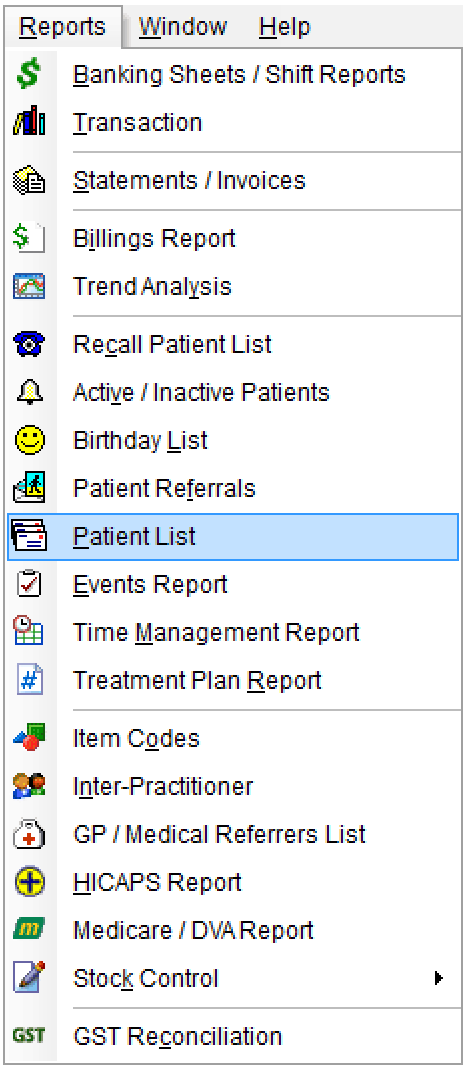
Patient List

The Patient List function generates a list of patients whose details correspond to a variety of selected options.

Click **Patient List** on the **Toolbar**



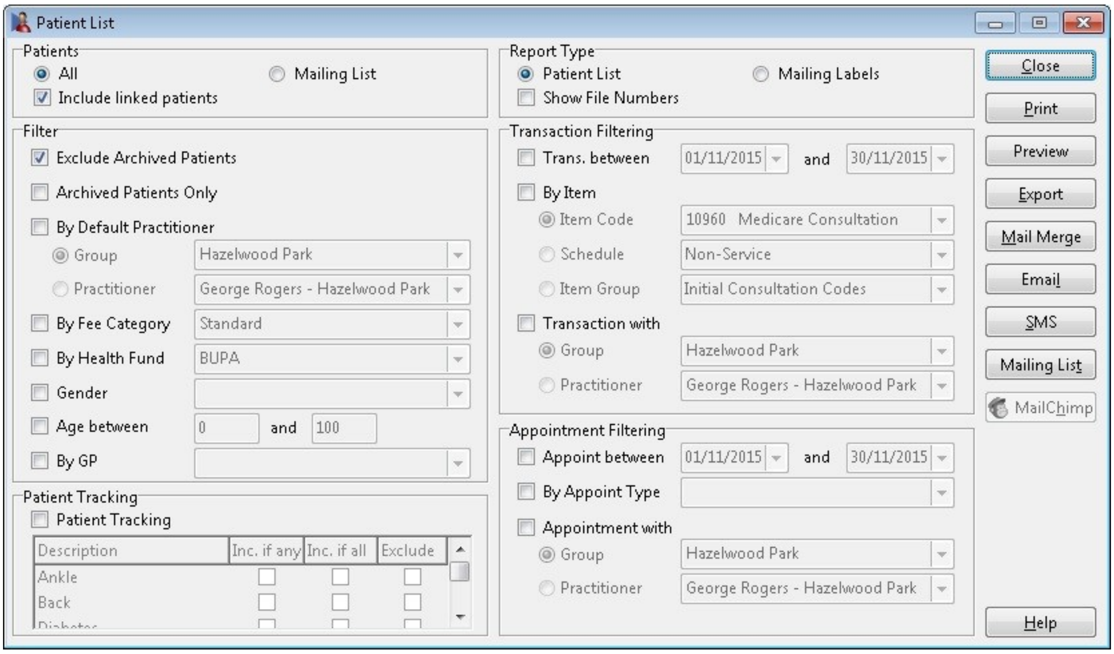
or from the **Reports** menu.



PATIENT LIST

Patient List

The **Patient List** dialog will appear.



Select **All** to list every patient. Check the **Include linked patients** option to add all linked patients to the list as well.

Select the **Mailing List** option to list all patients with the **Mailing List** option ticked on the **General** tab in their patient file.

Select either **Patient List** or **Mailing Labels** depending on the layout you require.

Select **Show File Numbers** to include patient file numbers on the report.

Exclude Archived Patients is selected by default. Remove this selection to include archived patients.

To view a list of only archived patients select the **Archived Patients Only** option.

If a Patient List relating to the patient's default practitioner or practice group is required then select **By Default Practitioner** and the relevant **Practice Group, Reporting Group** or **Practitioner**.

Select **By Fee Category** to list only those patients of a particular type, e.g. concession patients.

PATIENT LIST

Patient List

Select **By Health Fund** to list only those patients under a certain health fund.

Select **Gender** to list only those patients selected as male or female.

Enter the **Age Between** to list only patients within a specified age range.

To list patients under a particular GP, select the **By GP** option and select the specific GP.

Select **Patient Tracking** to list only those patients who have a particular tracking category set in their patient file.

- **Include if any** will generate a report of those patients who have *any* of the selected tracking categories set in their file.

- **Include if all** will generate a report of those patients who have all of the selected tracking categories set in their file.

- **Exclude** will generate a report *excluding* those patients who have the selected tracking categories set in their file.

The **Trans between** option can be used to list patients who have had a transaction between two specific dates.

Select **By Item** to list only patients who have a transaction entry with a particular **Item Code**, **Schedule** or **Item Group**.

To list patients who have had a transaction with a specific practitioner or practice group, select **Transaction with** and the relevant **Practice Group** or **Practitioner**.

Select **Appoint between** to generate a list of patients who have had appointments in a specified period e.g. all patients who have had appointments between 01/04/2016 and 30/04/2016.

Select **By Appointment Type** to list those patients who have had a particular type of appointment e.g. New Patients

To list patients who have had an appointment with a specific practitioner or practice group, select **Appointment with** and the relevant **Practice Group** or **Practitioner**.

PATIENT LIST

Patient List

This report may be **Printed** or **Previewed** by clicking the respective buttons.

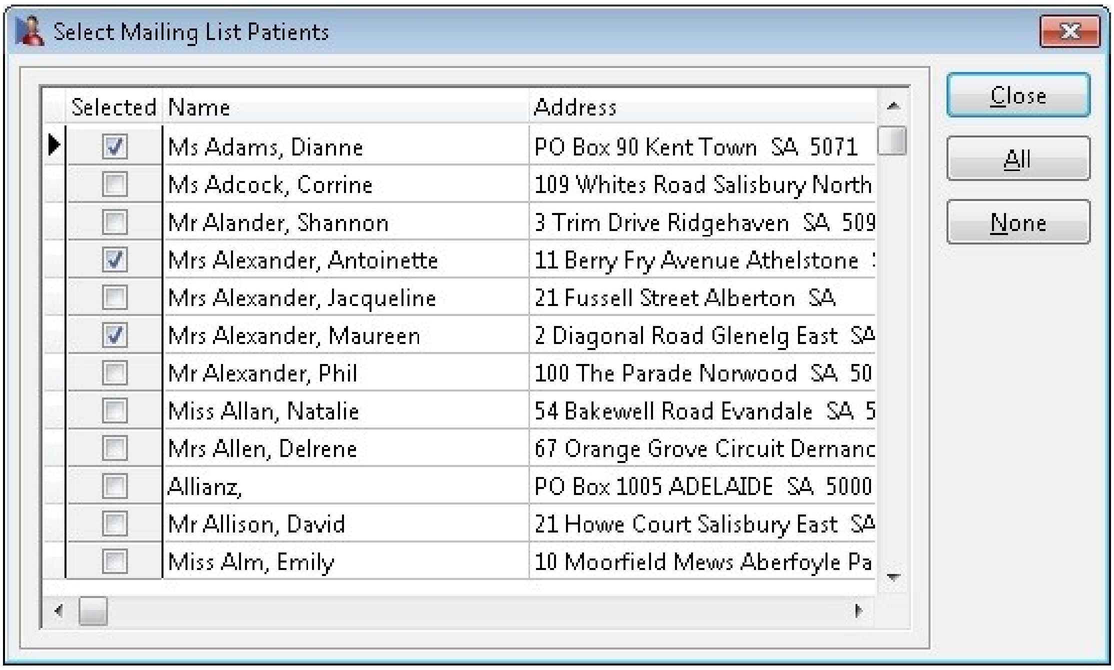
To export the Patient List to CSV or Microsoft Excel® click **Export.** This can be used to edit the patient list outside of Front Desk or for a mail merge.

Click **Mail Merge** to perform a mail merge using the **Front Desk Word Processor** or Microsoft Word®.

Click **Email** to send emails to those patients with an email address.

Click **SMS** to send SMS messages to those patients with a mobile number.

Click **Mailing List** to individually choose which patients to include on the mailing list. Patients can be added/removed from the dialog below, or by ticking the **Mailing List** option on the **General** tab of the patient file.



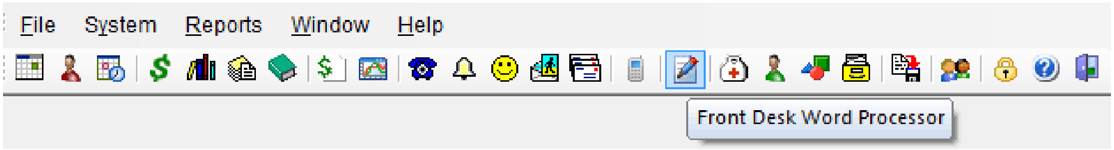
FRONT DESK WORD PROCESSOR

Front Desk Word Processor

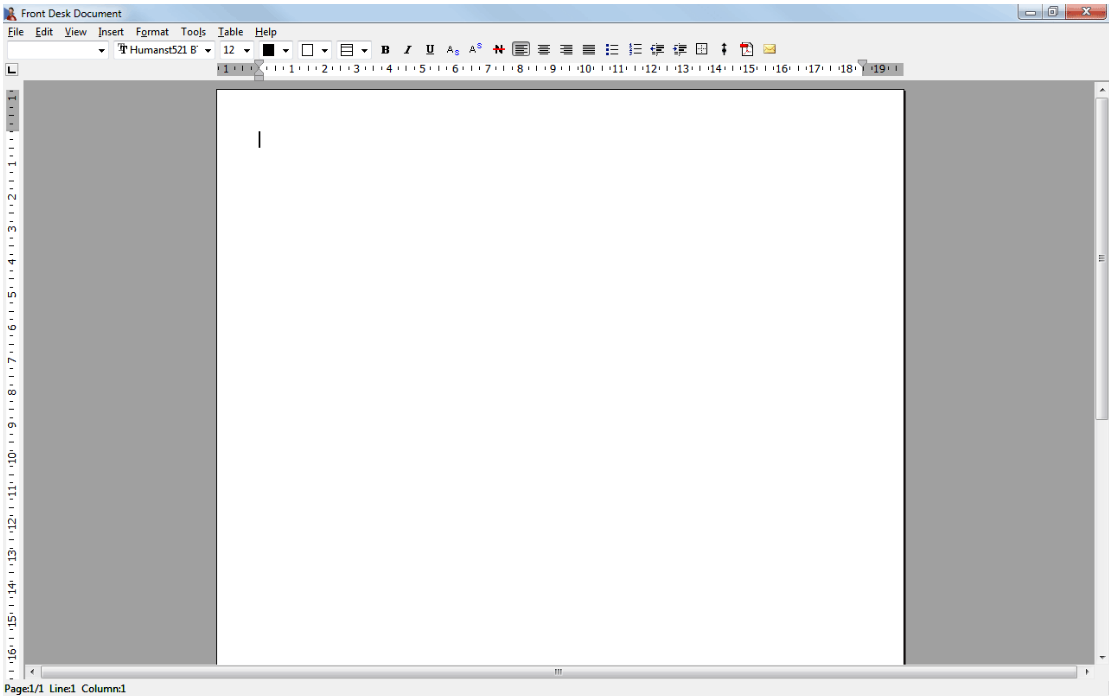
The **Front Desk Word Processor** can be used as a general word processor to create Standard Letters, Mail Merge documents or recording Clinical Notes in place of MS Word. This word processor includes a built-in medical dictionary.

We strongly recommend that you begin to replace your Standard Letters, Mail Merge Documents and Clinical Notes Templates created using MS Word with documents created in the Front Desk Word Processor to improve the performance, reliability and to significantly decrease the size of these documents when stored in Front Desk.

To open the **Front Desk Word Processor**, select the icon from the tool bar.



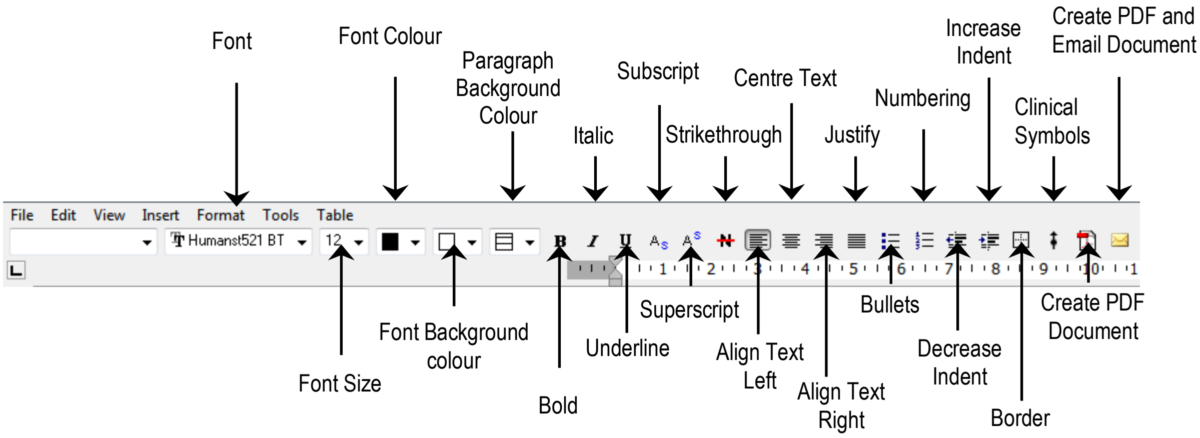
A blank document will open as below.



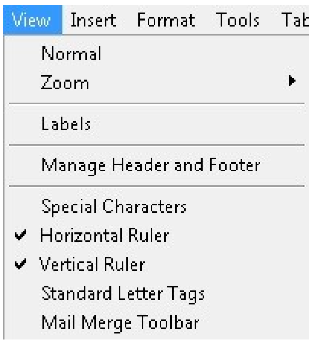
Using the word processing tools available, users can create, email and print documents. Documents can also be saved and opened later through the **Front Desk Word Processor**.

Front Desk Word Processor

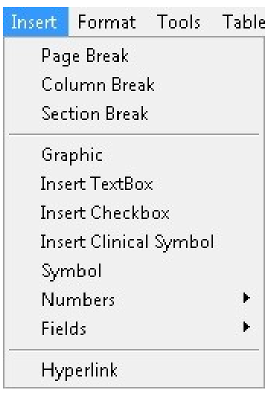
The **Toolbar** options are as follows:



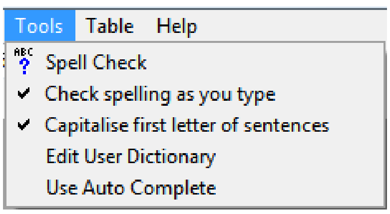
To add Standard Letter tags or view the Mail Merge Toolbar select the **View** drop-down menu.



To insert images, text boxes, checkboxes, clinical symbols, symbols, page numbers or date/time fields use the **Insert** drop-down menu.

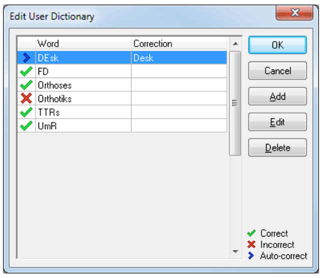


Spell Check options can be accessed from the **Tools** drop-down menu.



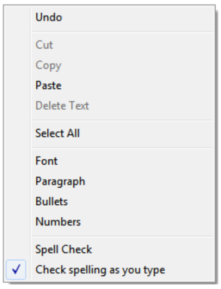
Front Desk Word Processor

Select **Edit User Dictionary** to edit words added to the dictionary.



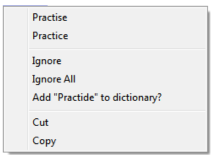
Right click to open a menu with the following options

- **Undo** will undo the last change made in the **Front Desk Word Processor**.
- **Cut** will cut the selected text from the **Front Desk Word Processor**.
- **Paste** will paste previously cut/copied text into the **Front Desk Word Processor**.
- **Delete Text** will delete the selected text.
- **Select All** will select all text in the **Front Desk Word Processor** document.
- **Font** will open a window that allows users to change font settings (size, text etc.).
- **Paragraph** will open a window that allows users to change paragraph settings.
- **Bullets** will start a bullet point list.
- **Numbers** will start a numbered list.
- **Spell Check** performs a spell check on the current document.
- **Check spelling as you type** will check spelling as you type.



Right click on an unrecognised word to open the following menu

- The first words are suggestions for correct spelling.
- **Ignore** will ignore the current spelling error.
- **Ignore All** will ignore the current spelling and all other identical spelling errors in the document.
- **Add "" to dictionary?** Will add the current word to the dictionary to be ignored in future.



INTEGRATION WITH MICROSOFT WORD®

Front Desk 2017 allows you to integrate with Microsoft Word® in two ways:

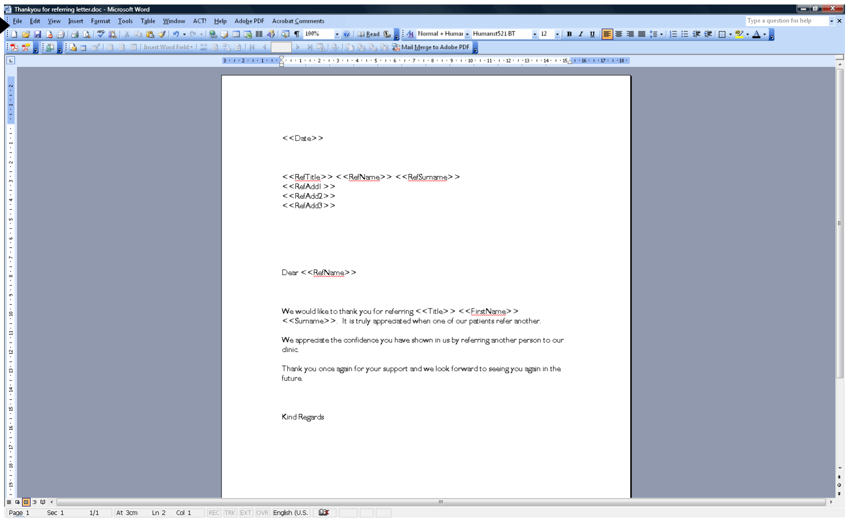
- *OLE (Object Linking and Embedding) Automation* allows information to be transferred between Front Desk 2017 and Microsoft Word® to automatically create a **standard letter** for a patient.
- Export data in a format that can be used for **mail merging**

Note: It is recommended that Standard Letters be created in the Front Desk Word Processor, rather than Microsoft Word.

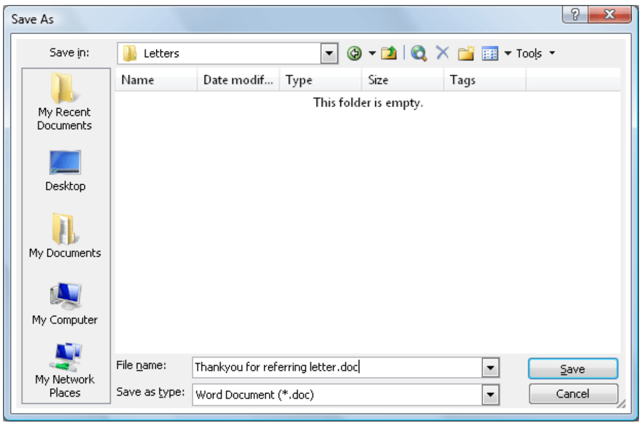
How to create a template letter:

1. Open a new **Microsoft Word®** document.
2. Over the next few pages is a list of **Standard Letter Tags**. Type the letter tags which are required for this particular letter exactly as they are listed in the manual. These tags will be replaced by your patient details.
3. Type the body of the letter.

File menu



4. From the **File** menu (in Word) select **Save**
5. From the **Save in** drop-down box select the location where you wish to save the letter e.g. My Documents
6. In the **File name** field, rename the document to suit the letter e.g. New Patient Letter



Standard Letter (SMS & Email) Tags

General Tags

<<Date>>	Today’s Date
<<Title>>	Patient Title
<<PatientNo>>	Patient Number
<<FirstName>>	First Name
<<MiddleName>>	Middle Name
<<PreferredName>>	Preferred Name
<<Surname>>	Surname
<<FullName>>	Patients Full Name
<<PrefName>>	Displays Patient’s Preferred Name if it exists, otherwise displays the Patient’s First Name
<<WorkPhone>>	Work Phone Number
<<HomePhone>>	Home Phone Number
<<Mobile>>	Mobile Phone Number
<<Fax>>	Fax Number
<<Email>>	Email Address
<<Age>>	Current Age
<<AgeNextBirthday>>	Age Next Birthday
<<Gender>>	Patients Gender
<<HimHer>>	Him or Her based on Patient’s Gender
<<HeShe>>	He or She based on Patient’s Gender
<<HisHers>>	His or Hers based on Patient’s Gender
<<HisHer>>	His or Her based on Patient’s Gender
<<DateOfBirth(dd/mm/yyyy)>>	Date Of Birth in dd/mm/yyyy format
<<PracName>>	Name of Patient’s Practitioner
<<PractitionerTitle>>	Title of Patient’s Practitioner
<<ProviderNo>>	Practitioner’s Provider Number
<<Qualifications>>	Practitioner’s Qualifications
<<PracticeAddress>>	Address from Clinic Information
<<PracticeLocation>>	Default Practitioner’s Location
<<FeeCategory>>	Fee Category
<<Address1>>	Address Line 1
<<Address2>>	Address Line 2
<<Address3>>	Address Line 3
<<FileNo>>	File Number
<<Occupation>>	Occupation
<<AppointmentTime>>	Appointment Date/Time
<<AppointmentPracName>>	Appointment Practitioner Name
<<NextAppointment>>	Next Appointment
<<NextAppointment2>>	The 2^{nd} Next Appointment
<<NextAppointment3>>	The 3^{rd} Next Appointment
<<NextAppointmentPracName>>	Next Appointment Practitioners Name
<<NextAppointment2PracName>>	2^{nd} Next Appointment Practitioners Name
<<NextAppointment3PracName>>	3^{rd} Next Appointment Practitioners Name
<<NextAppointmentInPeriod>>	Next Appointment in a particular date range
<<NextAppointmentInPeriodPracName>>	Practitioners Name for Appointment in Date Range
<<PreviousAppointment>>	Previous Appointment
<<PreviousAppointment2>>	The 2^{nd} Previous Appointment
<<PreviousAppointment3>>	The 3^{rd} Previous Appointment
<<PreviousAppointmentPracName>>	Previous Appointment Practitioners Name
<<PreviousAppointment2PracName>>	2^{nd} Previous Appointment Practitioners Name
<<PreviousAppointment3PracName>>	3^{rd} Previous Appointment Practitioners Name
<<ReferralExpiry>>	Expiry Date of Doctor’s Referral
<<ReferralDate>>	Date of Doctor’s Referral
<<PostCode>>	Post Code
<<FutureBillings>>	Future Billings
<<FutureBillingsCurrent>>	Future Billings Current

Additional Tags

<<MedicareNum>>	Medicare Number
<<MedicareExp>>	Medicare Expiry Date
<<HealthFund>>	Health Fund
<<MemberNum>>	Health Fund Membership Number
<<PensionNum>>	Pension Number
<<VetNum>>	Veterans Affairs Number

Treatment Plan Tags

<<TPStartDate>>	Treatment Plan Start Date
<<TPAlert>>	Treatment Plan Alert Status
<<TPCurrentTreatments>>	Number of Current Treatments
<<TPTreatments>>	Total Number of Treatments
<<TPAlertValue>>	Treatment Plan Alert Number
<<TPCurrentValue>>	Treatment Plan Current Value
<<TPTreatmentValue>>	Value of Treatments

GP Tags

<<GPTitle>>	GP's Title
<<GPFirstname>>	GP's First Name
<<GPSurname>>	GP's Surname
<<GPName>>	GP's Full Name
<<GPOrg>>	GP's Organisation
<<GPAdd1>>	GP's Address Line 1
<<GPAdd2>>	GP's Address Line 2
<<GPAdd3>>	GP's Address Line 3
<<GPAdd4>>	GP's Address Line 4
<<GPPhone>>	GP's Phone Number
<<GPFax>>	GP's Fax Number
<<GPEmail>>	GP's Email Address
<<GPProviderNo>>	GP's Provider Number

Account Dependant Tags

<<BillToAddress1>>	Bill to Address Line 1
<<BillToAddress2>>	Bill to Address Line 2
<<BillToAddress3>>	Bill to Address Line 3
<<BillToAddress4>>	Bill to Address Line 4
<<BillToPhone>>	Bill to Phone
<<BillToFax>>	Bill to Fax Number
<<LastStatement>>	Date of Last Statement
<<LastInvoice>>	Date of Last Invoice
<<LastPaid>>	Date of last time Patient paid
<<LastBilled>>	Date of last time Patient was billed
<<Current>>	Current Amount Owing
<<30Days>>	Amount Owing between 30 and 60 days
<<60Days>>	Amount Owing between 60 and 90 days
<<90Days+>>	Amount Owing over 90 days
<<TotalBilled>>	Total Amount Billed
<<TotalBalance>>	Total Balance
<<AccNumber>>	Account Number
<<ClaimNumber>>	Claim Number
<<EmployerName>>	Employer Name
<<DateOfInjury>>	Date of Injury
<<Injury>>	Injury

Referrer Tags

<<ReferredBy>>	Name of Referrer #1
<<RefTitle>>	Referrer #1 Title
<<RefName>>	Referrer #1 First Name
<<RefSurname>>	Referrer #1 Surname
<<RefAdd1>>	Referrer #1 Address1
<<RefAdd2>>	Referrer #1 Address2
<<RefAdd3>>	Referrer #1 Address3
<<RefHome>>	Referrer #1 Home Phone
<<RefWork>>	Referrer #1 Work Phone
<<RefMobile>>	Referrer #1 Mobile Phone
<<RefFax>>	Referrer #1 Fax
<<RefCount>>	Number of people referred by Referrer #1
<<RefDate>>	Referrer #1 Date
<<ReferredBy2>>	Name of Referrer #2
<<Ref2Title>>	Referrer #2 Title
<<Ref2Name>>	Referrer #2 First Name
<<Ref2Surname>>	Referrer #2 Surname
<<Ref2Add1>>	Referrer #2 Address1
<<Ref2Add2>>	Referrer #2 Address2
<<Ref2Add3>>	Referrer #2 Address3
<<Ref2Home>>	Referrer #2 Home Phone
<<Ref2Work>>	Referrer #2 Work Phone
<<Ref2Mobile>>	Referrer #2 Mobile Phone
<<Ref2Fax>>	Referrer #2 Fax
<<Ref2Count>>	Number of people referred by Referrer #2
<<Ref2Date>>	Referrer #2 Date
<<ReferredByProf>>	Name of Professional Referrer
<<RefTitleProf>>	Professional Referrer Title
<<RefNameProf>>	Professional Referrer First Name
<<RefSurnameProf>>	Professional Referrer Surname
<<RefAdd1Prof>>	Professional Referrer Address1
<<RefAdd2Prof>>	Professional Referrer Address2
<<RefAdd3Prof>>	Professional Referrer Address3
<<RefHomeProf>>	Professional Referrer Home Phone
<<RefWorkProf>>	Professional Referrer Work Phone
<<RefMobileProf>>	Professional Referrer Mobile Phone
<<RefFaxProf>>	Professional Referrer Fax
<<RefCountProf>>	Number of people referred by Non-Professional Referrer
<<RefDateProf>>	Professional Referrer Date
<<ReferredByNonProf>>	Name of Non Professional Referrer
<<RefTitleNonProf>>	Non Professional Referrer Title
<<RefNameNonProf>>	Non Professional Referrer First Name
<<RefSurnameNonProf>>	Non Professional Referrer Surname
<<RefAdd1NonProf>>	Non Professional Referrer Address1
<<RefAdd2NonProf>>	Non Professional Referrer Address2
<<RefAdd3NonProf>>	Non Professional Referrer Address3
<<RefHomeNonProf>>	Non Professional Referrer Home Phone
<<RefWorkNonProf>>	Non Professional Referrer Work Phone
<<RefMobileNonProf>>	Non Professional Referrer Mobile Phone
<<RefFaxNonProf>>	Non Professional Referrer Fax
<<RefCountNonProf>>	Number of people referred by Non Professional Referrer
<<RefDateNonProf>>	Non Professional Referrer Date

Medical Specialist Referral Tag (Advanced Options)

<<ReferralDate>>	Date Referral begins
<<ReferralPeriod>>	Period of Referral
<<ReferralPrac>>	Practitioner referred to
<<ReferralTitle>>	Referrer Title
<<ReferralName>>	Referrer First Name
<<ReferralSurname>>	Referrer Surname
<<ReferralPhone>>	Referrer Phone number
<<ReferralAddress1>>	Referrer Address Line 1
<<ReferralAddress2>>	Referrer Address Line 2
<<ReferralAddress3>>	Referrer Address Line 3
<<ReferralAddress4>>	Referrer Address Line 4
<<ReferralFax>>	Referrer Fax
<<ReferralEmail>>	Referrer Email
<<ReferralProviderNo>>	Referrer Provider Number
<<ReferralType>>	Type of Referrer
<<ReferralOrganisation>>	Referrer's Organisation

Contact Tags

<<ContactTitle(MT)>>	Contact Title
<<ContactFirstname(MT)>>	Contact Firstname
<<ContactSurname(MT)>>	Contact Surname
<<ContactAddress1(MT)>>	Contact Address Line 1
<<ContactAddress2(MT)>>	Contact Address Line 2
<<ContactAddress3(MT)>>	Contact Address Line 3
<<ContactHomePhone(MT)>>	Contact Home Phone number
<<ContactWorkPhone(MT)>>	Contact Work Phone number
<<ContactMobile(MT)>>	Contact Mobile Phone number
<<ContactFax(MT)>>	Contact Fax number
<<ContactEmail(MT)>>	Contact Email Address

NOTE: When using the Contact Tags you should replace the letters MT with the merge type specified in relationship.

INTEGRATION WITH MICROSOFT WORD®

When using dates in letter tags, there are several ways of formatting the date using the specifiers below.

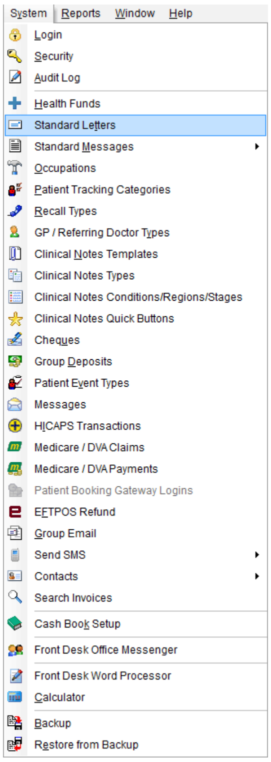
d	Displays the day as a number without the leading zero (1-31)
dd	Displays the day as a number with the leading zero (01-31)
ddd	Displays the day as an abbreviation (Sun-Sat)
dddd	Displays the day as a full name (Sunday-Saturday)
m	Displays the month as a number without a leading zero (1-12). If the m specifier immediately follows the h or hh specifier, the minute rather than month will be displayed
mm	Displays the month as a number with a leading zero (01-12). If the mm specifier immediately follows the h or hh specifier, the minute rather than month will be displayed
mmm	Displays the month as an abbreviation (Jan-Dec)
mmmm	Displays the month as a full name (January-December)
yy	Displays the year as a two digit number (00-99)
yyyy	Displays the year as a four digit number (0000-9999)
h	Displays the hour without a leading zero (0-23)
hh	Displays the hour with a leading zero (00-23)
n	Displays the minute without a leading zero (0-59)
nn	Displays the minute with a leading zero (00-59)
s	Displays the seconds without a leading zero (0-59)
ss	Displays the seconds with a leading zero (00-59)
z	Displays milliseconds without a leading zero (0-999)
zz	Displays milliseconds with a leading zero (00-999)
am/pm	Uses the 12 hour clock for the preceding h or hh specifier, and displays ‘am’ any hour before noon and ‘pm’ for any hour after noon. The am/pm specifier can use lower case, upper case or a mix of both and the result is displayed accordingly.
a/p	Uses the 12 hour clock for the preceding h or hh specifier and displays ‘a’ any hour before noon and ‘p’ for any hour after noon. The a/p specifier can use lower case, upper case or a mix of both and the result is displayed accordingly.
/	Displays the date separator character
:	Displays the time separator character
‘xx’/”xx”	Characters enclosed in single or double quotes are displayed as is and do not affect formatting.

For example, the letter tag **<<AppointmentTime(dddd mmmm dd ‘at’ h:mm am/pm)>>** would appear as **Wednesday April 20 at 3:30 pm**.

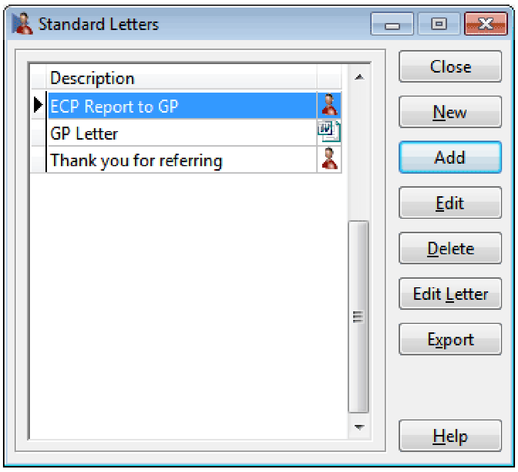
FRONT DESK WORD PROCESSOR

Setting up Standard Letters

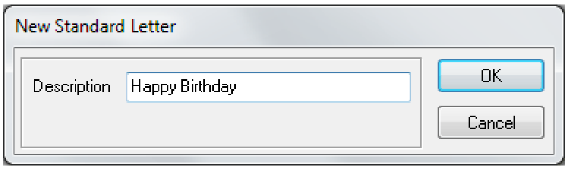
To add a standard letter to *Front Desk 2017*, select **Standard Letters** from the **System** menu.



A **Standard Letters** dialog will appear.



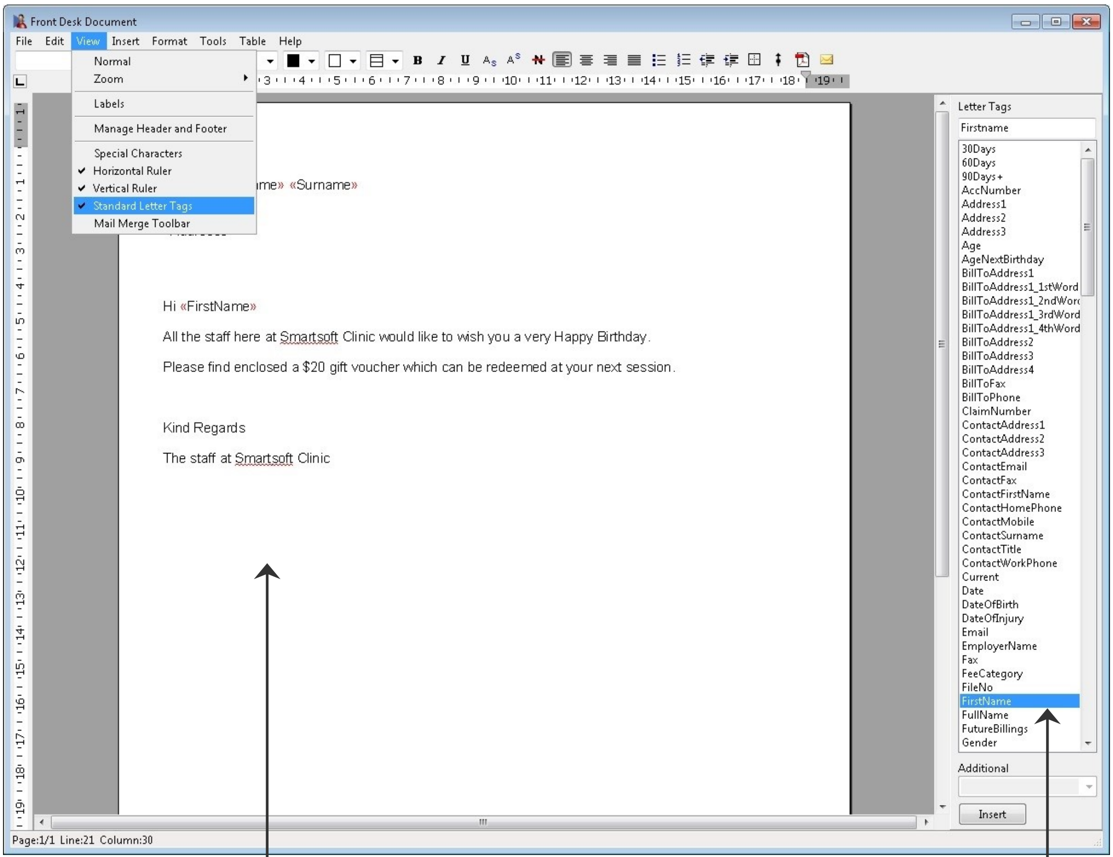
To create a new letter in the **Front Desk Word Processor** click **New**.



Enter the **Description** and click **OK**.

Setting up Standard Letters

The **Front Desk Word Processor** will open, as below. A list of available Letter Tags will be displayed on the right-hand side. If these are not visible, turn them on by checking the **Standard Letter Tags** option on the **View** menu.

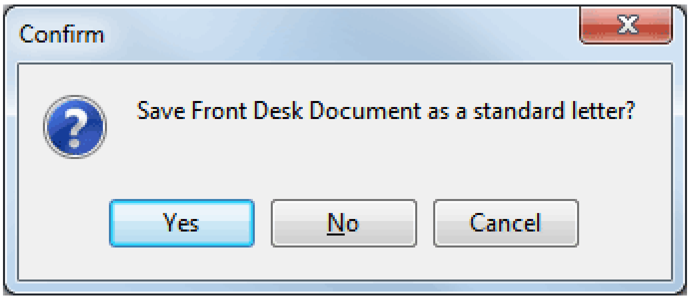


Create the body of the letter

Select the desired letter tag to insert into the body of the letter

Type your document, inserting letter tags by selecting them from the list on the right-hand side and clicking the **Insert** button (or by double clicking).

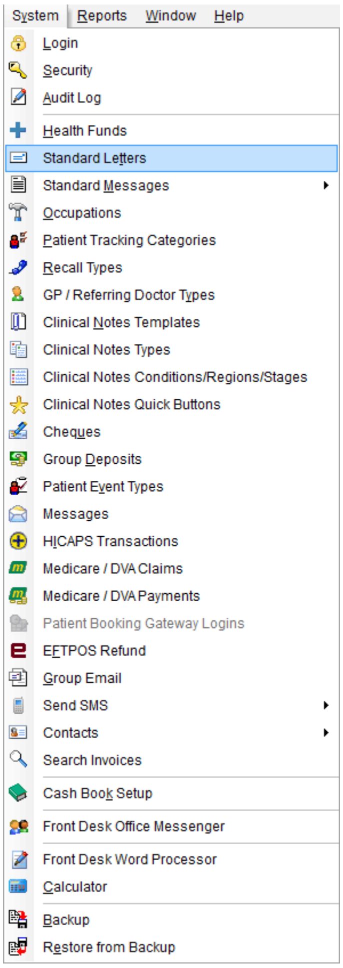
Close the document and click **Yes** to save the Standard Letter template.



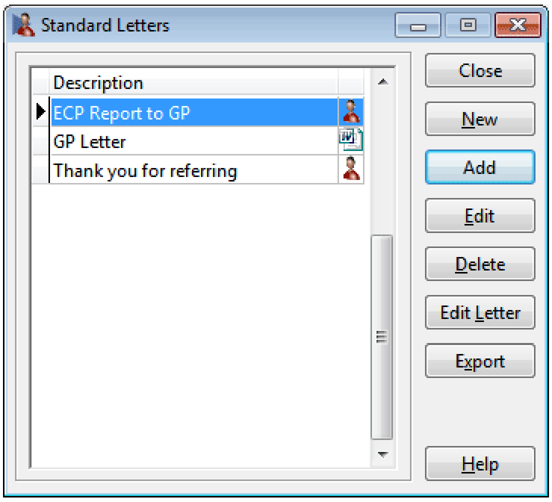
INTEGRATION WITH MICROSOFT WORD®

Setting up Standard Letters

To import a standard letter into *Front Desk 2017* from Microsoft Word®, select **Standard Letters** from the **System** menu.



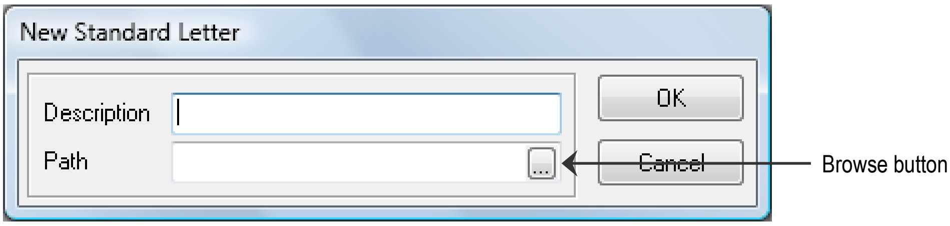
A **Standard Letters** dialog will appear.



To import a standard letter click **Add**.

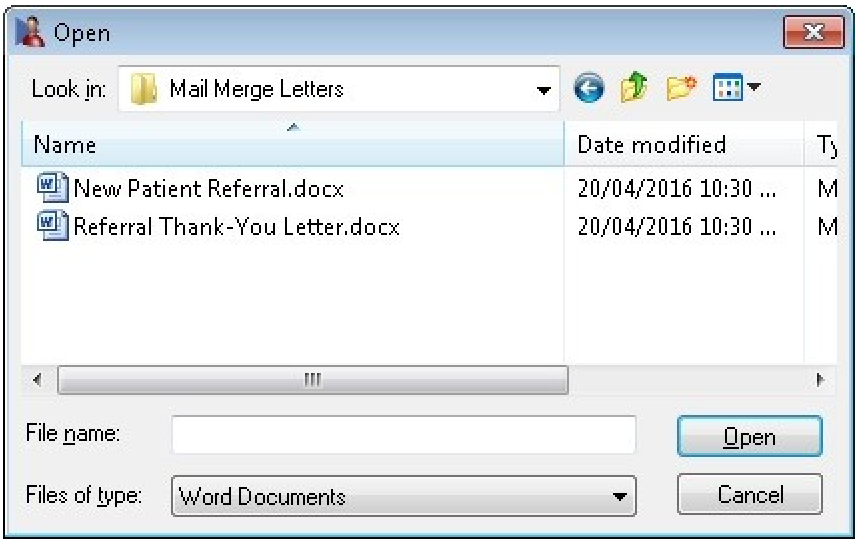
Setting up Standard Letters

You will be presented with the following **New Standard Letter** dialog.



Enter a **Description** for the letter. For example, New Patient Letter.

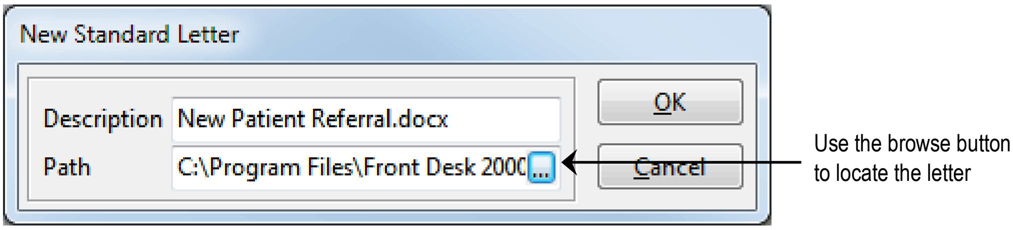
Click the browse button at the end of the Path field. You will be presented with the following screen.



From the **Look in** drop-down box select the location where you saved the letter e.g. My Documents.

Highlight the correct letter and click **Open**.

You will be presented with a **New Standard Letter** screen.



Click **OK**.

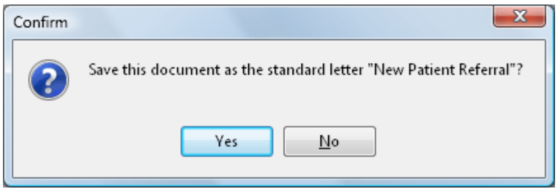
You have now successfully imported your standard letter into *Front Desk 2017*.

Setting up Standard Letters

The following options can be used within Standard Letters.

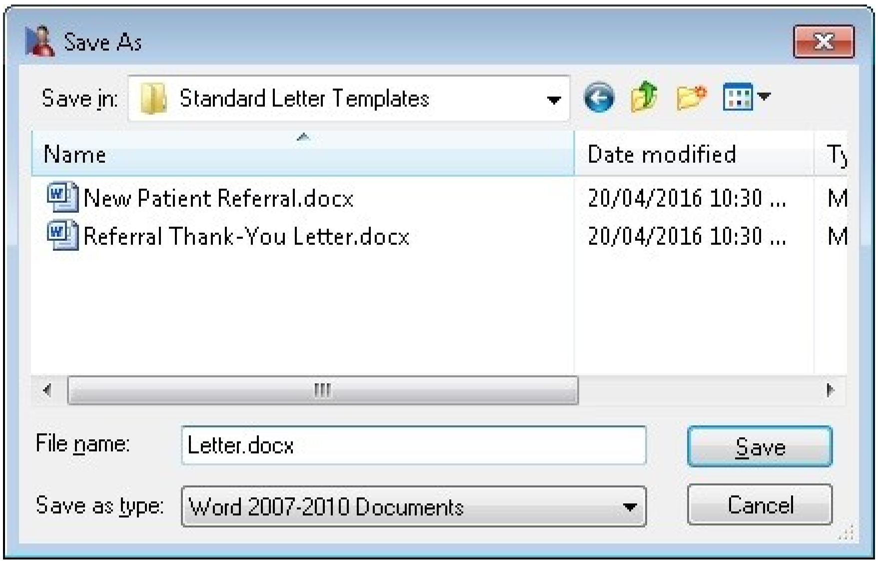
Edit allows you to change the name of an existing letter and **Delete** allows you to remove a letter.

Edit Letter can be used if you wish to edit the original document. Highlight the letter from the Standard Letter screen and click **Edit Letter**. Depending on the type of letter, either the document will open in either the **Front Desk Word Processor** or Microsoft Word®. Make the changes as required then close the document (no need to save the document). The following screen will appear.



Click **Yes** to replace the letter with the one you've just edited or **No** to keep the original.

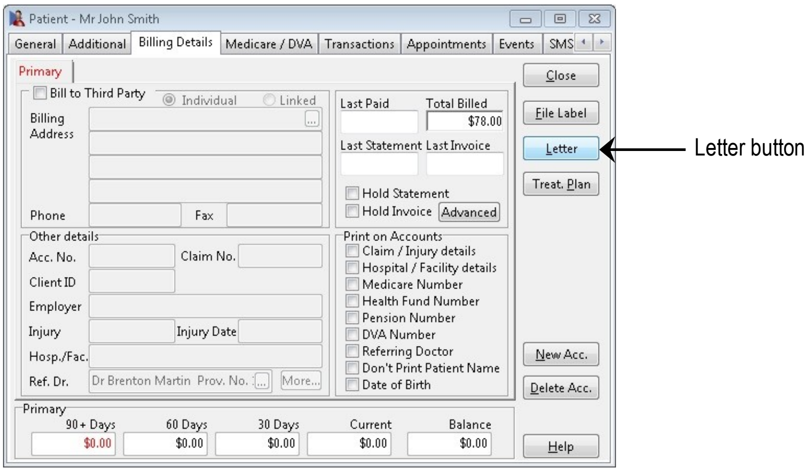
Export allows you to save a standard letter to a location on your computer. Highlight the letter from the **Standard Letter** screen and click **Export**. This will open up the following dialog.



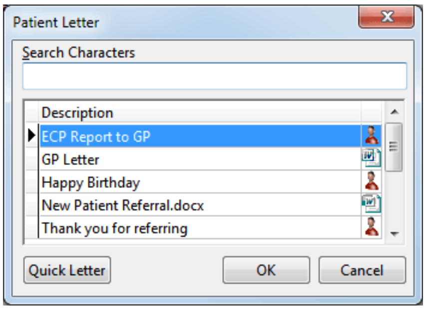
From the **Save in** drop-down box select the location where you wish to export the letter. Enter a name in the **File name** field and click **Save** to complete the export.

Using a Standard Letter

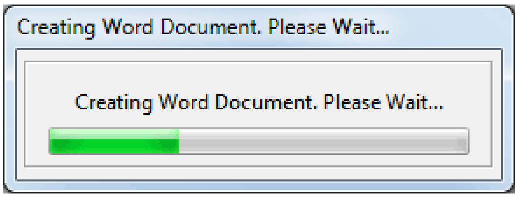
1. Select the **Billing Details** tab on a patient's file.
2. Click the **Letter** button.



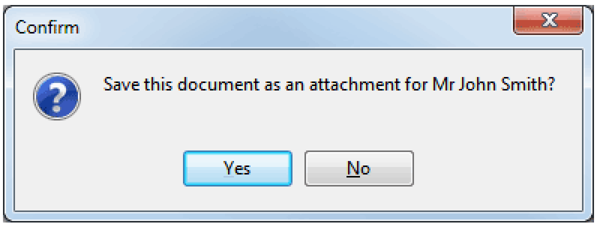
3. From the **Patient Letter** dialog highlight the required letter and click **OK**.



4. If using a Microsoft Word® template, Microsoft Word® will create a word document using the standard letter and replace the letter tags used with the patients details. If using a **Front Desk Word Processor** template, the document will open automatically in the **Front Desk Word Processor**.

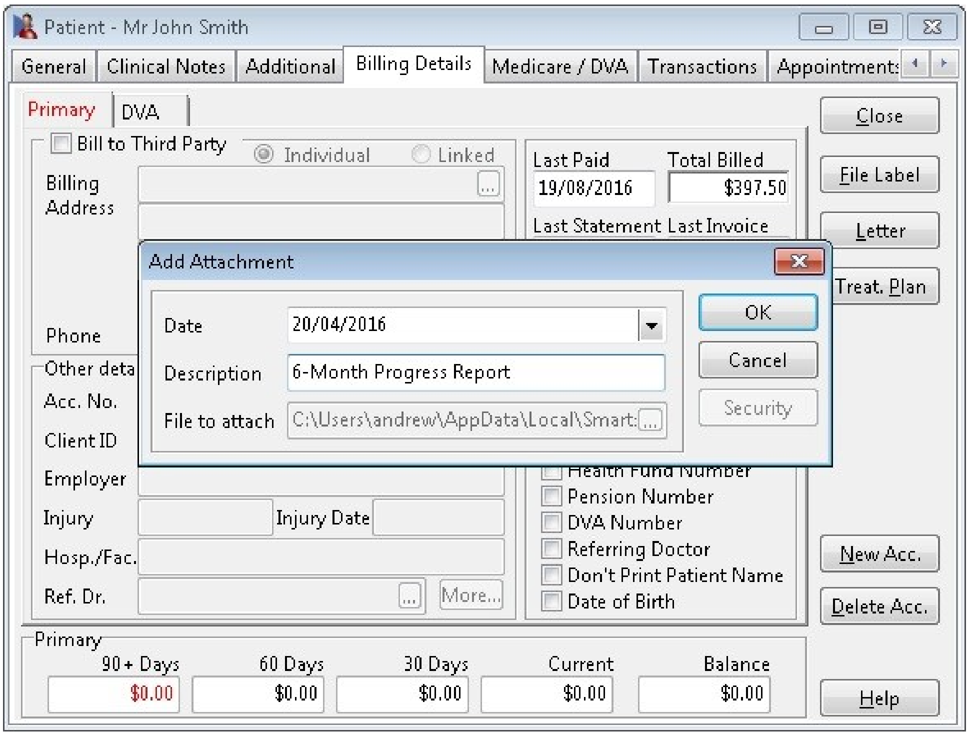


5. **Print** the document if required then close the document.
6. The following screen will appear, click **Yes** to save the document to the attachments tab on the patient's file.

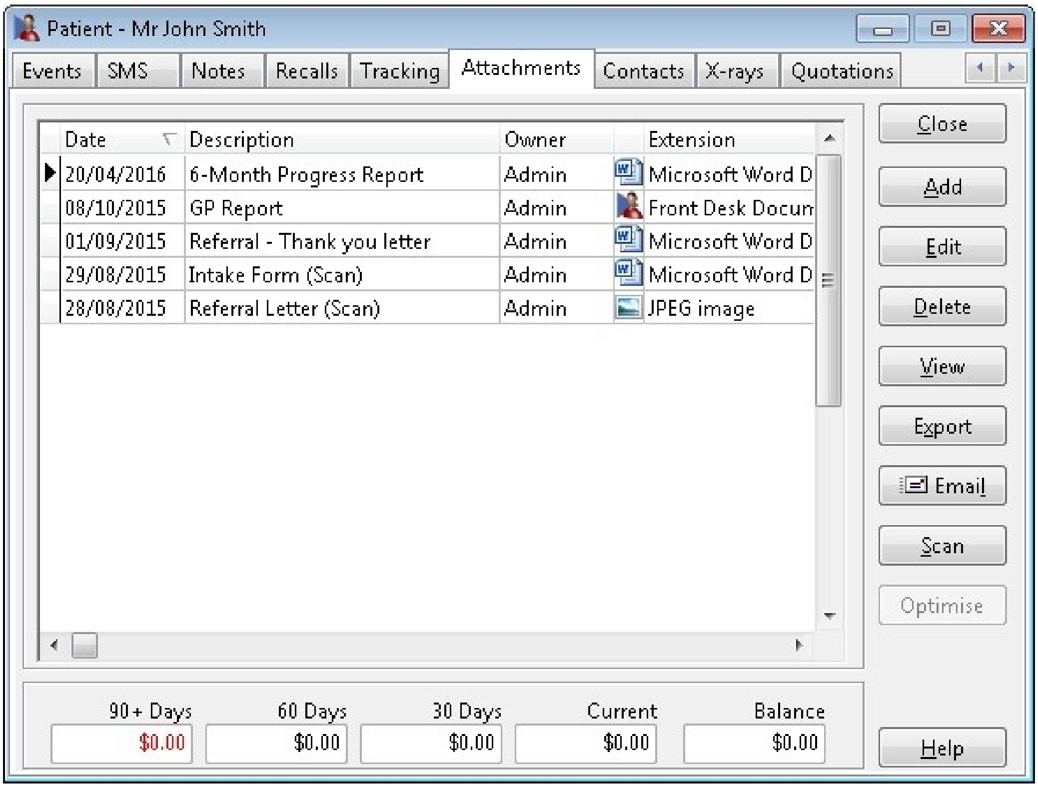


Using a Standard Letter

7. The **Add Attachment** screen will prompt you as shown below.
8. Select the date and type a description of the document.



9. Click **OK** and the document will now be saved in the patient's file under the **Attachments** tab.



MAIL MERGE WITH FRONT DESK WORD PROCESSOR

This section covers Mail Merging with the **Front Desk Word Processor**.

A mail merge creates multiple copies of the same document with each customised with individual patient details.

A mail merge may be used to send a reminder or recall letter to selected patients.

The following *Front Desk 2017* reports all integrate with the **Front Desk Word Processor Mail Merge** function.

Recall Patient List

Active / Inactive Patients

Birthday List

Patient Referrals

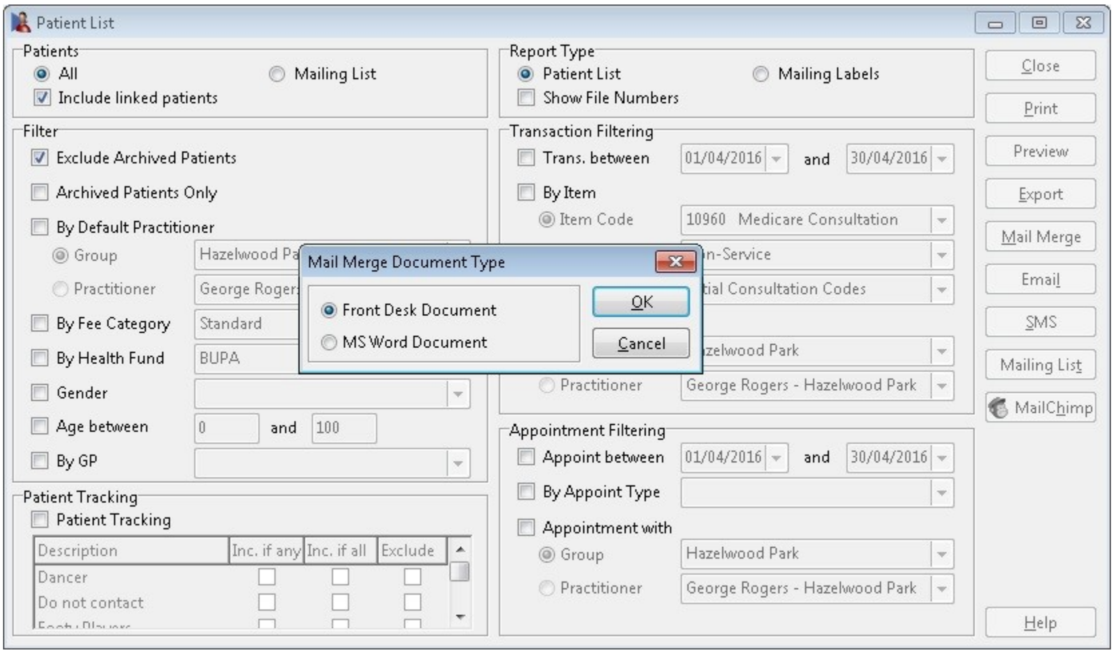
Patient List

Events Report

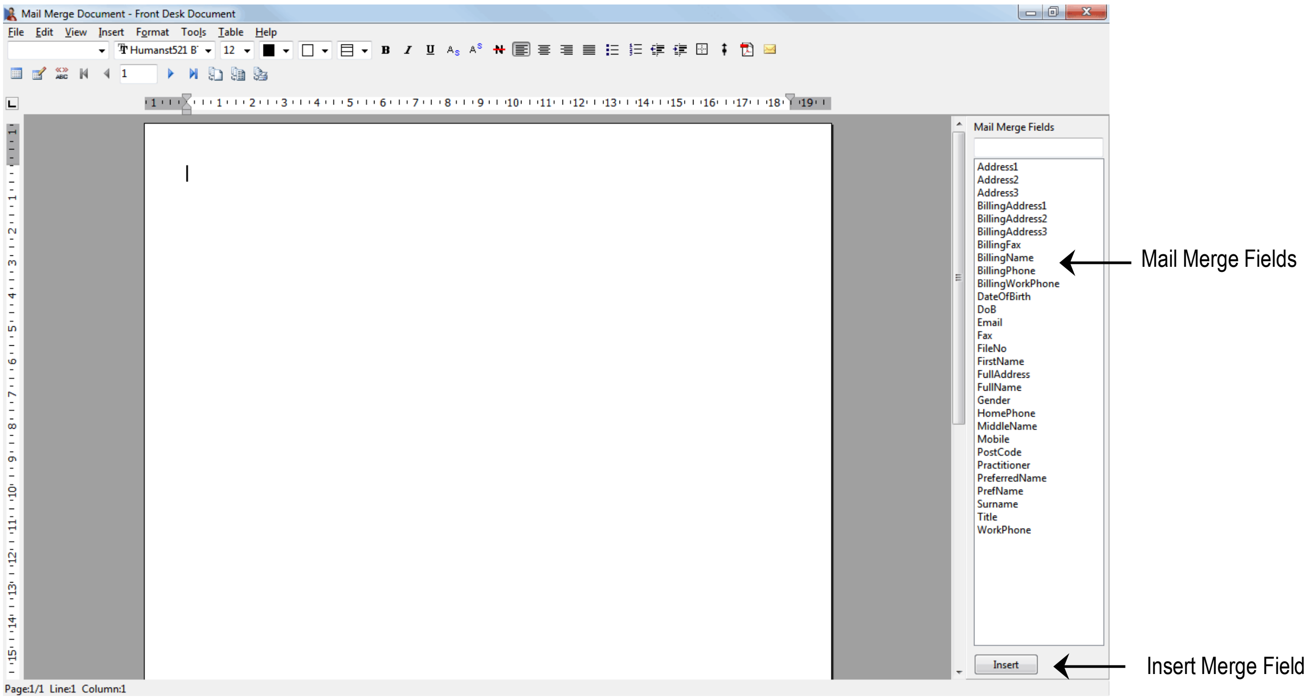
GP / Medical Referrers List

Creating a Mail Merge letter....

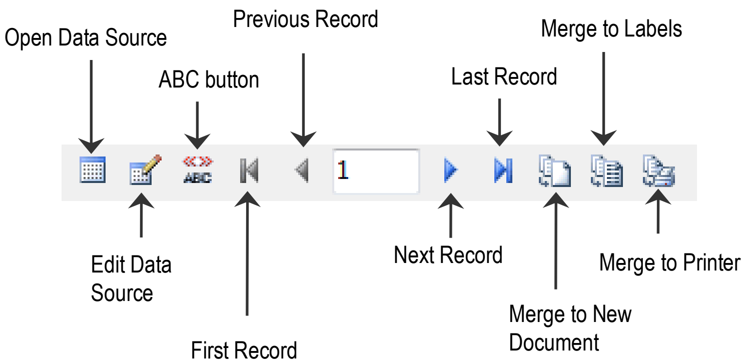
1. Select the required information from a report (for instance the Patient List report) and click the **Mail Merge** button.
2. Select **Front Desk Document** and click **OK**.



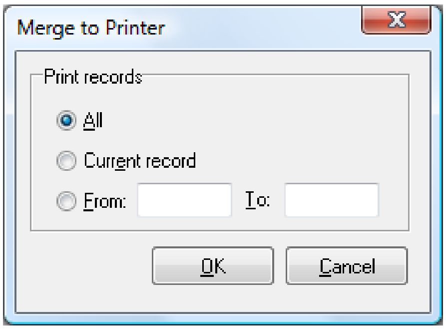
3. The **Front Desk Word Processor** with **Mail Merge Fields** will open automatically.



4. Highlight **Title** from the **Mail Merge Fields** section and click **<INSERT>**.
5. Highlight **FirstName** from the **Mail Merge Fields** section and click **<INSERT>**.
6. Highlight **Surname** from the **Mail Merge Fields** section and click **<INSERT>**.
7. Enter a new line.
8. Highlight **Address1** from the **Mail Merge Fields** section and click **<INSERT>**.
9. Enter a new line.
10. Highlight **Address2** from the **Mail Merge Fields** section and **<INSERT>**.
11. Enter a new line.
12. Highlight **Address3** from the **Mail Merge Fields** section and click **<INSERT>**.
13. Press **<ENTER>** on keyboard four times.
14. Type the word **Dear** and press the spacebar on the keyboard. Select **FirstName** from the **Mail Merge Fields** section and click **<INSERT>**.
15. Press the **<ENTER>** key on the keyboard once.
16. Type the body of the letter, using merge fields from the **Mail Merge Fields** section as necessary.
17. If you wish to preview the mail merge, click the ABC button on the mail merge toolbar.

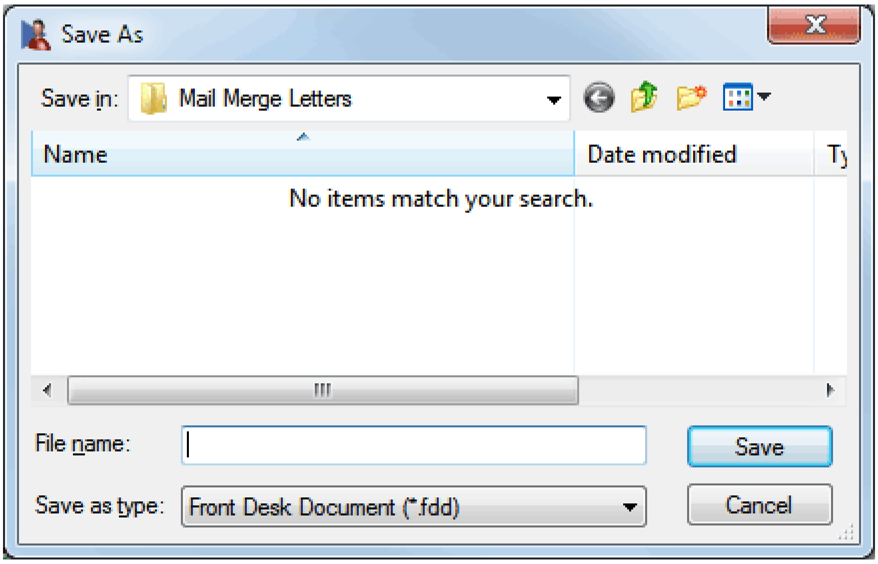


18. View each letter by clicking the **Next** and **Previous** record arrows.
19. Click **Merge to Printer** to print all letters, or **Merge to New Document** if you would like to save the completed document for use at a later time.
20. Select **All** to print all letters, **Current record** to print the current letter, or enter **From** and **To** page numbers to print a selection of letters.



If you wish to save the document (for use in *Front Desk 2017* later).

21. From the **File** menu select **Save**.
22. From the **Save in** drop-down box select the location where you wish to save the letter e.g. My Documents.
23. In the **File name** field, rename the document to suit the letter e.g. Monthly Recalls.



If you wish to open a previously exported dataset, click **Open Data Source** and browse for a Microsoft Excel or CSV file. The current data source can also be edited by clicking **Edit Source Data**. This allows you to exclude selected records from the mail merge.

MAIL MERGE WITH MICROSOFT WORD® 2003

This section covers Integration with Microsoft Word® 2003 and XP for backwards compatibility. If you are unsure which version of word you are running, select **About Microsoft Word®** from the **Help** menu in Microsoft Word®. If there is no Help menu, then you are running Word 2007 or above.

A mail merge creates multiple copies of the same document with each customised with individual patient details.

A mail merge may be used to send a reminder or recall letter to selected patients.

The following *Front Desk 2017* reports all integrate with the **Microsoft Word® Mail Merge** function.

Recall Patient List

Active / Inactive Patients

Birthday List

Patient Referrals

Patient List

Events Report

GP / Medical Referrers List

Front Desk 2017 - Note

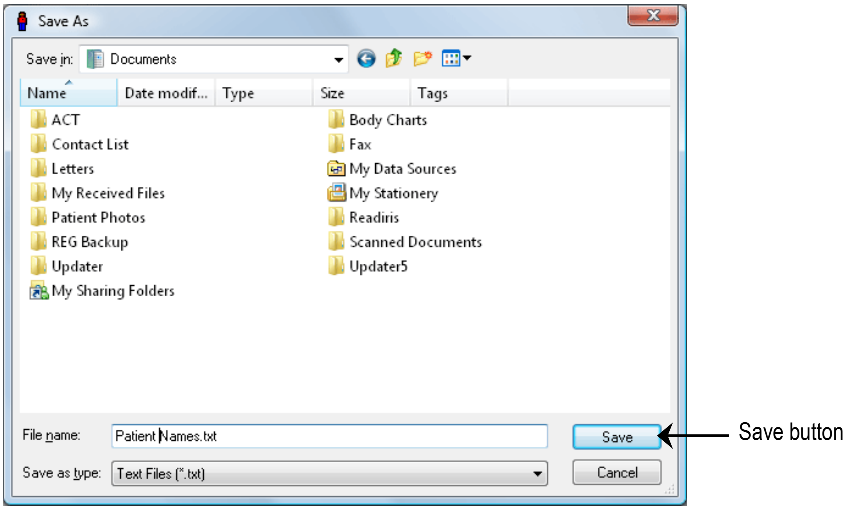
Front Desk 2017 is capable of generating mail merge data. **Text (with Header)** is the default format setting, which is set under the **Mail Merge** tab in **System Information**.

As the capabilities of computer systems vary, the default **Data Format** may not be compatible with your system. If this is an issue, then use the alternate **dBase** format option.

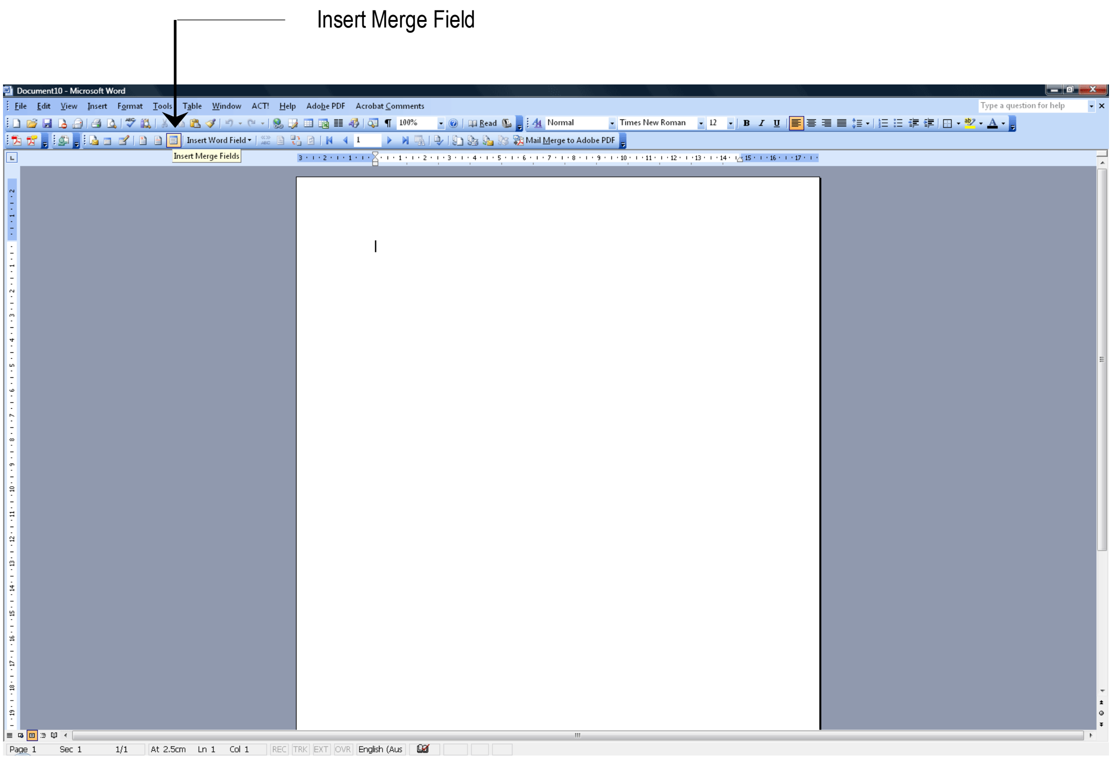
The default system location where the mail merge data is saved is C:\ProgramData\Smartsoft\Front Desk. If you wish to change the **Data Files Location** click the browse button and set the required path.

Creating a Mail Merge letter....

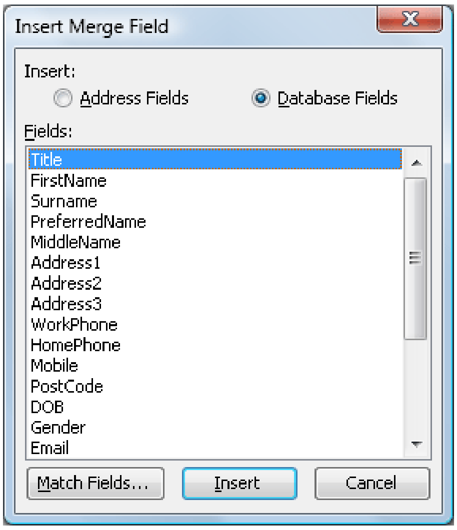
1. Select the required information from a report (for instance the Patient List report) and click the **Mail Merge** button.
2. Select **MS Word Document** and click **OK**.
3. From the **Save in** drop-down box select the location where you wish to save the patient details e.g. My Documents.



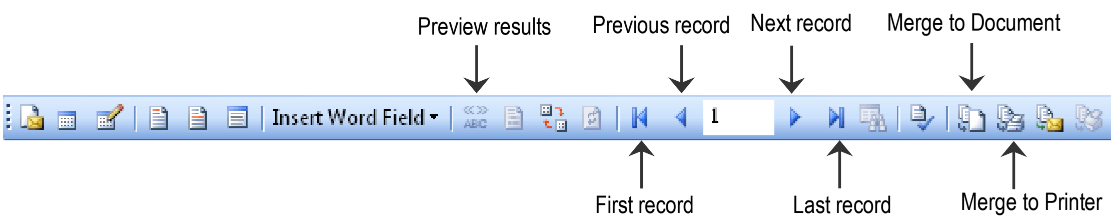
4. Enter a name in the **File name** field and click **Save** to complete.
5. **Microsoft Word®** will automatically open (if it has been installed). A new document called **Document1** will appear.
6. Click the **Insert Merge Field** icon on the mail merge toolbar shown below.



7. The following **Insert Merge Field** dialog will appear

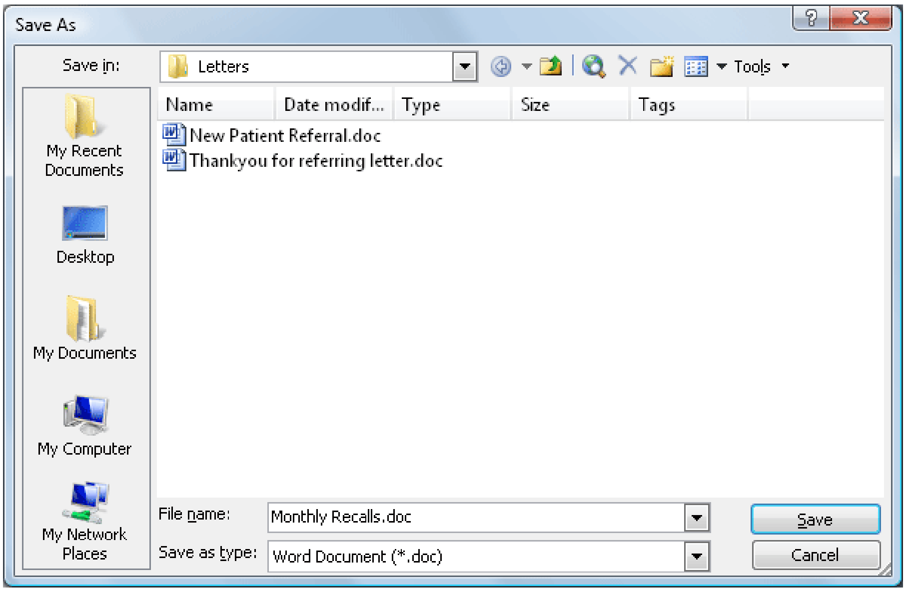


8. Highlight **Title** from the **Insert Merge Field** dialog, click **<INSERT>** then click the **Close** button, press the **<SPACEBAR>** on the keyboard.
9. Click the **Insert Merge Field** button, highlight **FirstName**, click **<INSERT>** then click the **Close** button, press the **<SPACEBAR>** on the keyboard.
10. Click the **Insert Merge Field** button, highlight **Surname**, click **<INSERT>** then click the **Close** button, press the **<ENTER>** key on the keyboard.
11. Click the **Insert Merge Field** button, highlight **Address1**, click **<INSERT>** then click the **Close** button, press the **<ENTER>** key on the keyboard.
12. Click the **Insert Merge Field** button, highlight **Address2**, click **<INSERT>** then click the **Close** button, press the **<ENTER>** key on the keyboard.
13. Click the **Insert Merge Field** button, highlight **Address3,** click **<INSERT>** then click the **Close** button.
14. Press **<ENTER>** on keyboard four times.
15. Type the word **Dear** and press the **<SPACEBAR>** on the keyboard. Click the **Insert Merge Field** button, highlight **FirstName** again, click the **Close** button.
16. Press the **<ENTER>** key on the keyboard once.
17. Type the body of the letter; use any other merge fields from the **Insert Merge Field** screen.
18. To preview the mail merge click the **<<ABC>>** button on the mail merge toolbar.



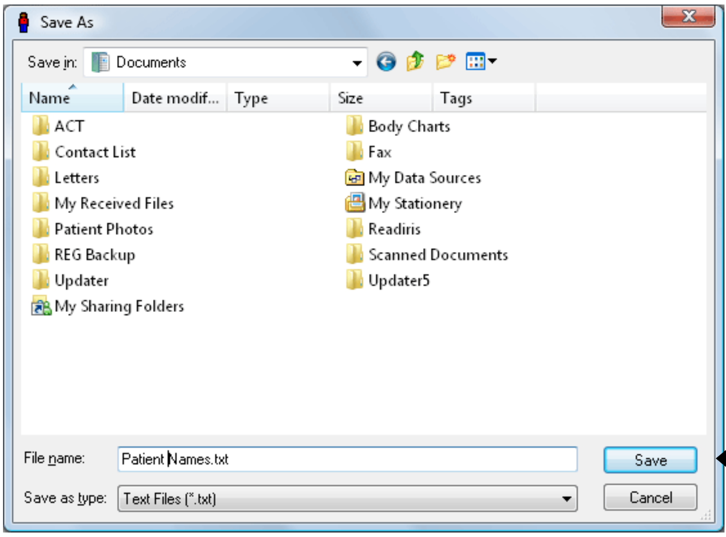
19. View each letter by clicking the **Next** and **Previous** record arrows.
20. Click **Merge to Printer** to print all letters.

21. From the **File** menu (in Microsoft Word®) select **Save**.
22. From the **Save in** drop-down box select the location where you wish to save the letter e.g. My Documents.
23. In the **File name** field, rename the document to suit the letter e.g. Monthly Recalls.



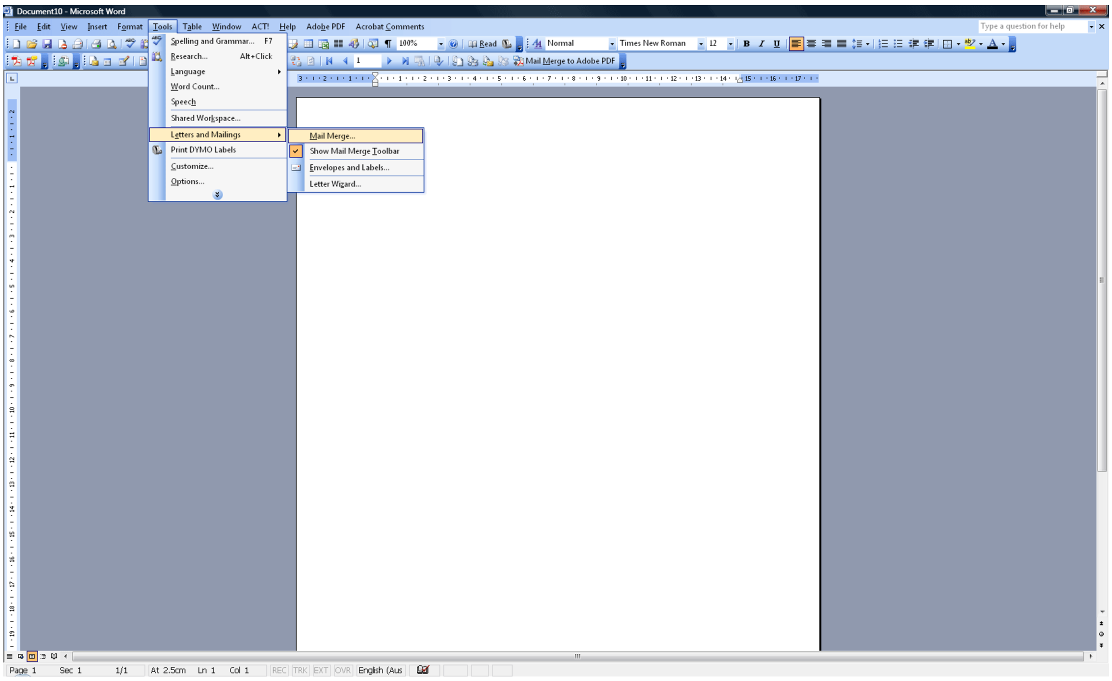
Creating mailing labels using Mail Merge...

1. Select the required information from a report (for instance the Patient List report) and click the **Mail Merge** button.
2. Select **MS Word Document** and click **OK**.
3. From the **Save in** drop-down box select the location where you wish to save the patient details e.g. My Documents.

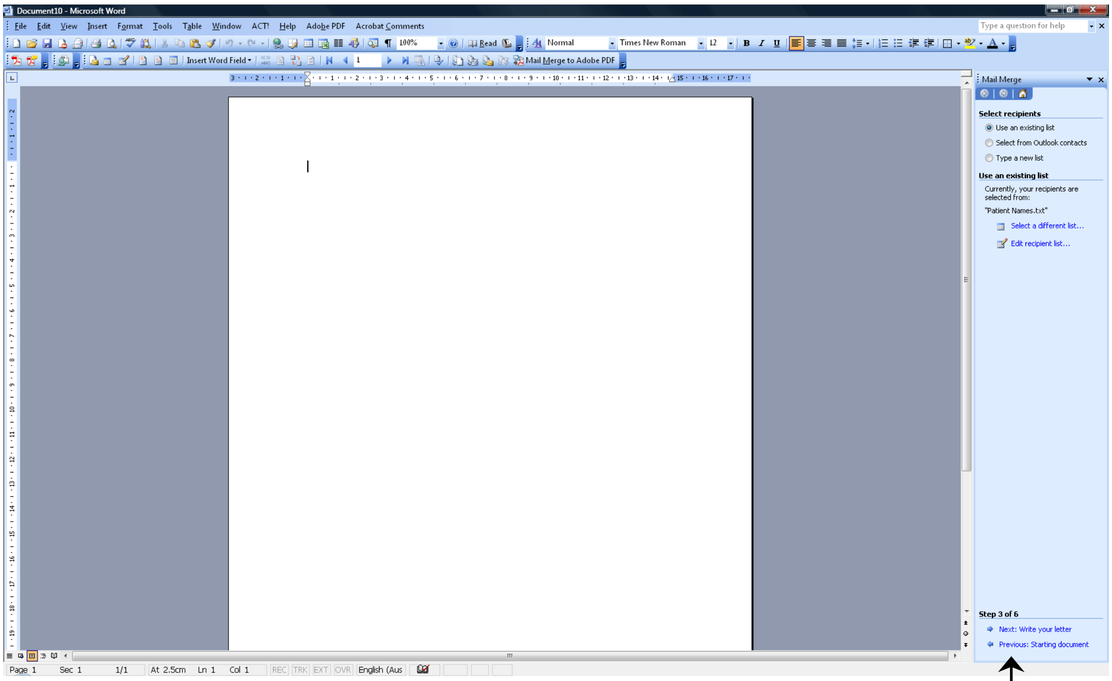


Save button

4. Enter a name in the **File name** field and click **Save** to complete.
5. **Microsoft Word®** will automatically open (if it has been installed). A new document called **Document1** will appear.
6. Go to the **Tools** menu go down to **Letters and Mailing** and select **Mail Merge…**



7. The **Mail Merge Helper** will appear on the right hand side of the document.



Six steps to complete mail merge

8. Follow through the 6 steps in the bottom right hand corner of this screen.

MAIL MERGE WITH MICROSOFT WORD® 2007, 2010, 2013, 2016

This section covers Integration with Microsoft Word® 2007, 2010, 2013 and 2016. If you are unsure which version of Word you are running, select **About Microsoft Word®** from the **Help** menu in Microsoft Word®. If there is no Help menu, then you are running Word 2007 or above.

A mail merge creates multiple copies of the same document with each customised with individual patient details.

A mail merge may be used to send a reminder or recall letter to selected patients.

The following *Front Desk 2017* reports all integrate with the **Microsoft Word® Mail Merge** function.

- **Recall Patient List**
- **Active / Inactive Patients**
- **Birthday List**
- **Patient Referrals**
- **Patient List**
- **Events Report**
- **GP / Medical Referrers List**

Front Desk 2017 - Note

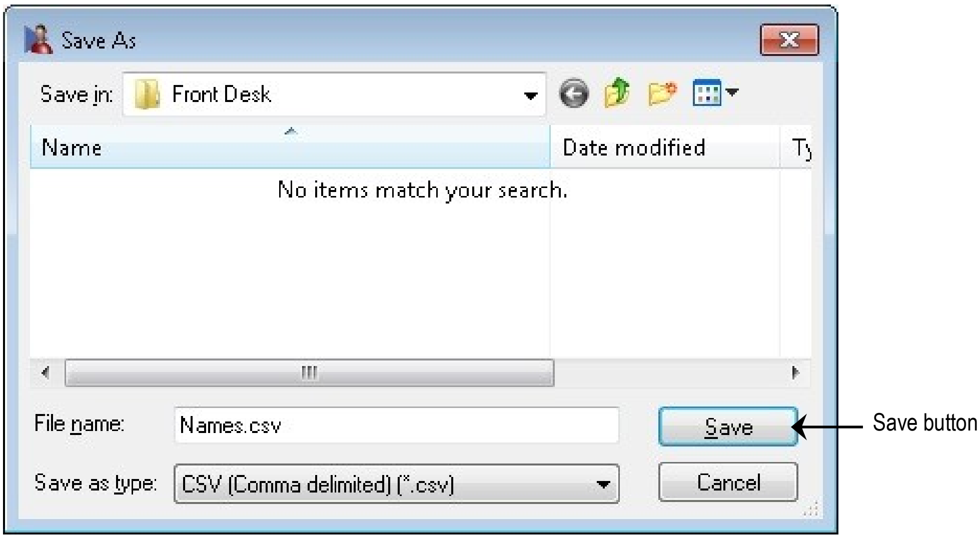
Front Desk 2017 is capable of generating mail merge data. **Text (with Header)** is the default format setting, which is set under the **Mail Merge** tab in **System Information**.

As the capabilities of computer systems vary, the default **Data Format** may not be compatible with your system. If this is an issue, then use the alternate **dBase** format option.

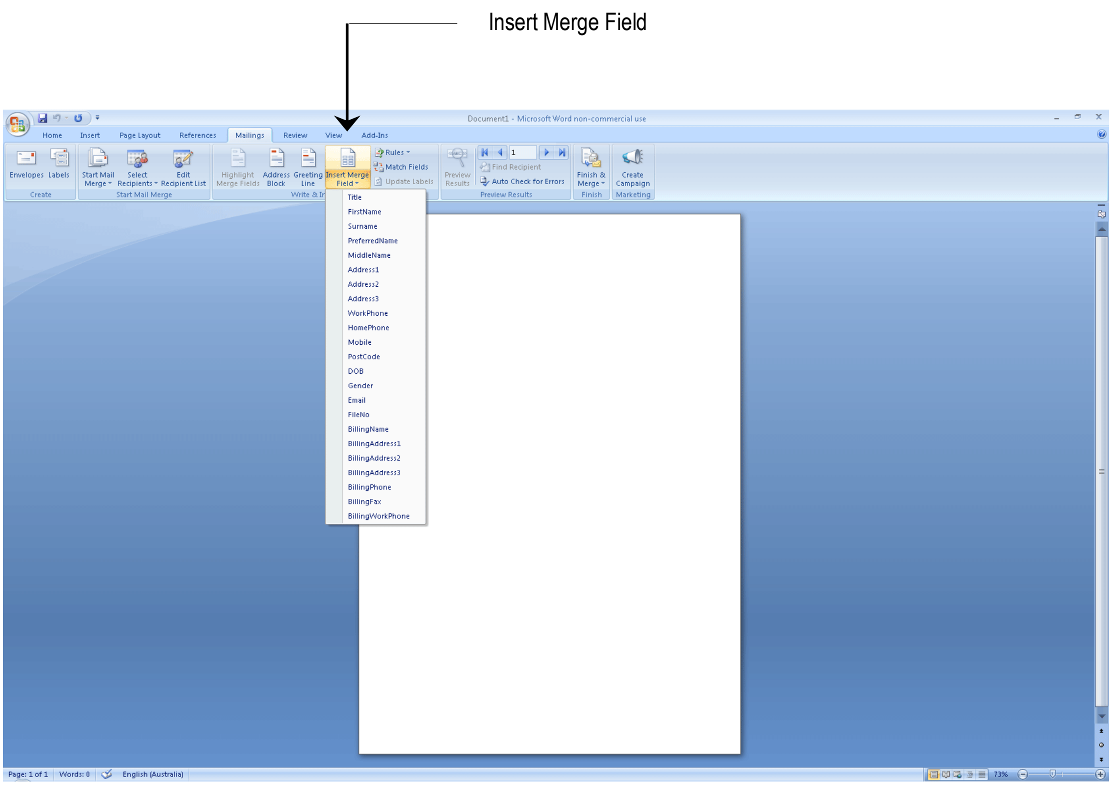
The default system location where the mail merge data is saved is C:\ProgramData\Smartsoft\Front Desk. If you wish to change the **Data Files Location** click the browse button ... and set the required path.

Creating a Mail Merge letter....

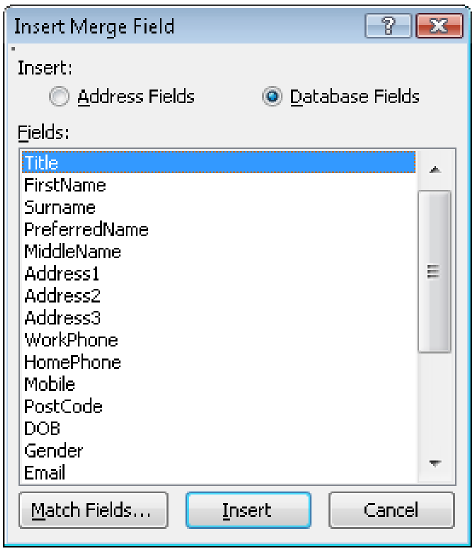
1. Select the required information from a report (for instance the Patient List report) and click the **Mail Merge** button.
2. Select **MS Word Document** and click **OK**.
3. From the **Save in** drop-down box select the location where you wish to save the patient details e.g. My Documents.



4. Enter a name in the **File name** field and click **Save** to complete.
5. **Microsoft Word®** will automatically open (if it is installed). A new document called **Document1** will appear.
6. Click the **Insert Merge Field** icon on the mail merge toolbar shown below.



7. The following **Insert Merge Field** dialog will appear.



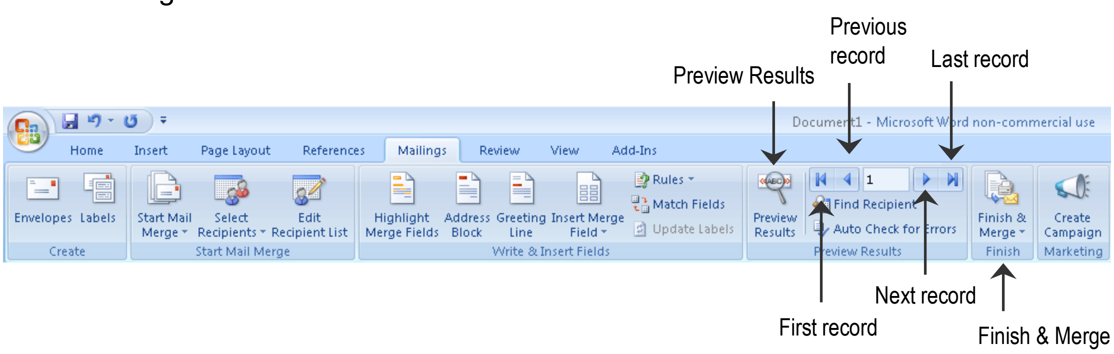
8. Using the Insert Merge Field dialog, highlight the merge fields you wish to use and click Insert to insert them within your document at the current cursor position. For example this could be used to insert a standard address block using a combination of the Address and Name tags as below:

<<Title>> <<FirstName>> <<Surname>>
<<Address1>>
<<Address2>>
<<Address3>>

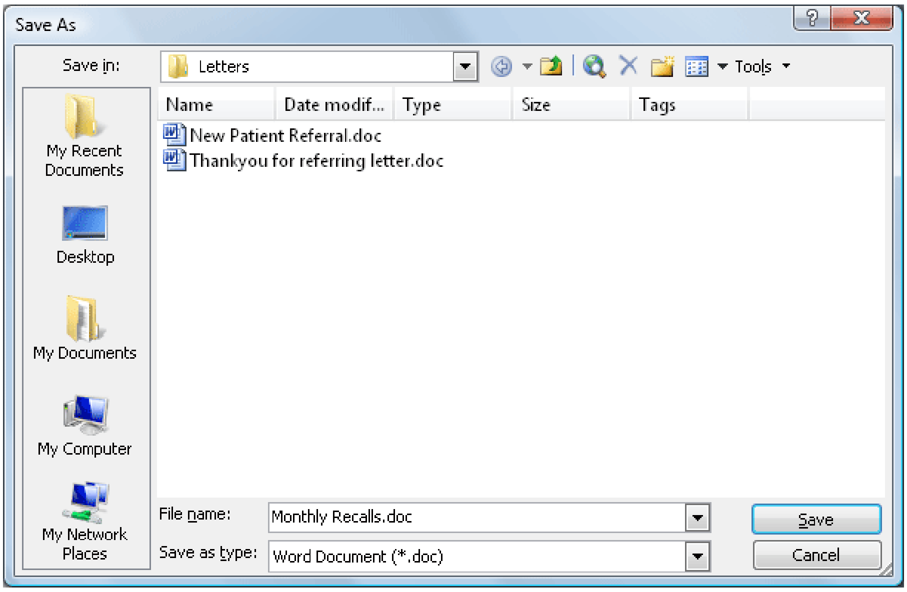
Depending on the information within the patient file, this could populate as:

Mr John Smith
Smartsoft (Australia) Pty Ltd
107 Flinders Street
Adelaide SA 5000

9. To preview the mail merge click the **Preview Results** button on the mail merge toolbar.



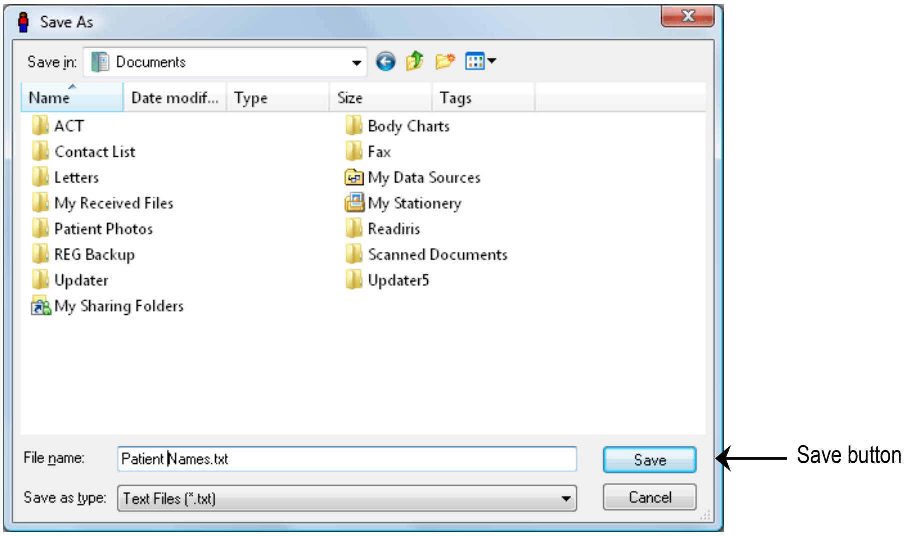
10. View each letter by clicking the **Next** and **Previous** record arrows.
11. Select **Finish & Merge** to print all letters.
12. From the **Office** (in Word 2007) or **File** (Word 2013) menu select **Save**.
13. From the **Save in** drop-down box select the location where you wish to save the letter e.g. My Documents.
14. In the **File name** field, rename the document to suit the letter e.g. Monthly Recalls.



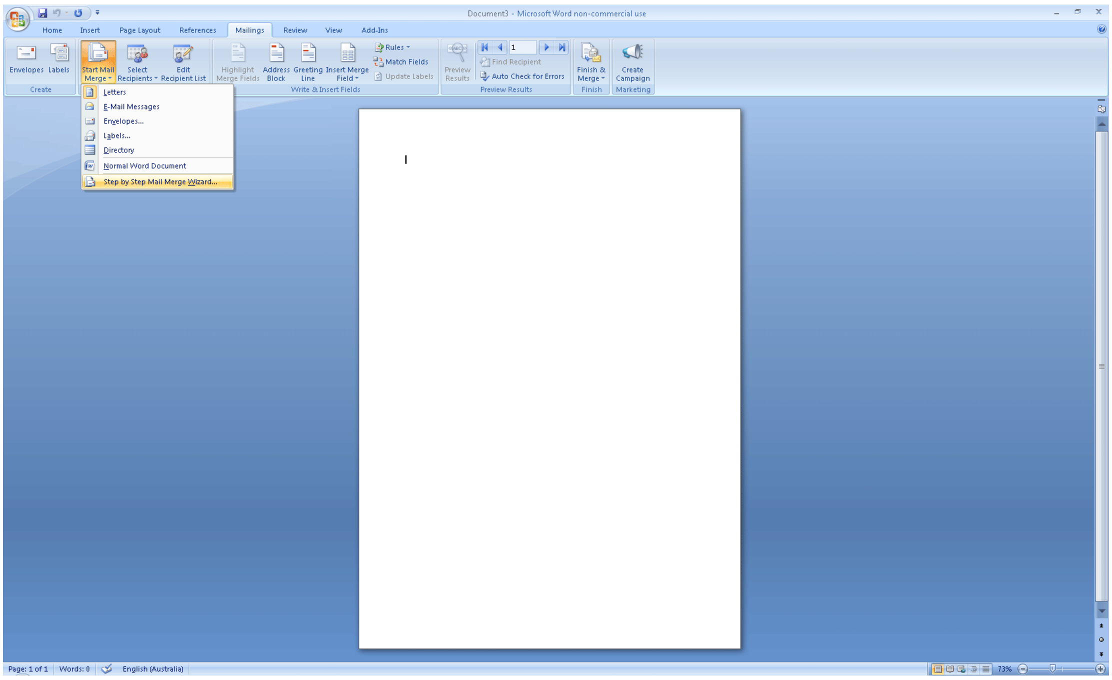
Saving the document on your computer allows it to be reused in the future if necessary.

Creating mailing labels using Mail Merge....

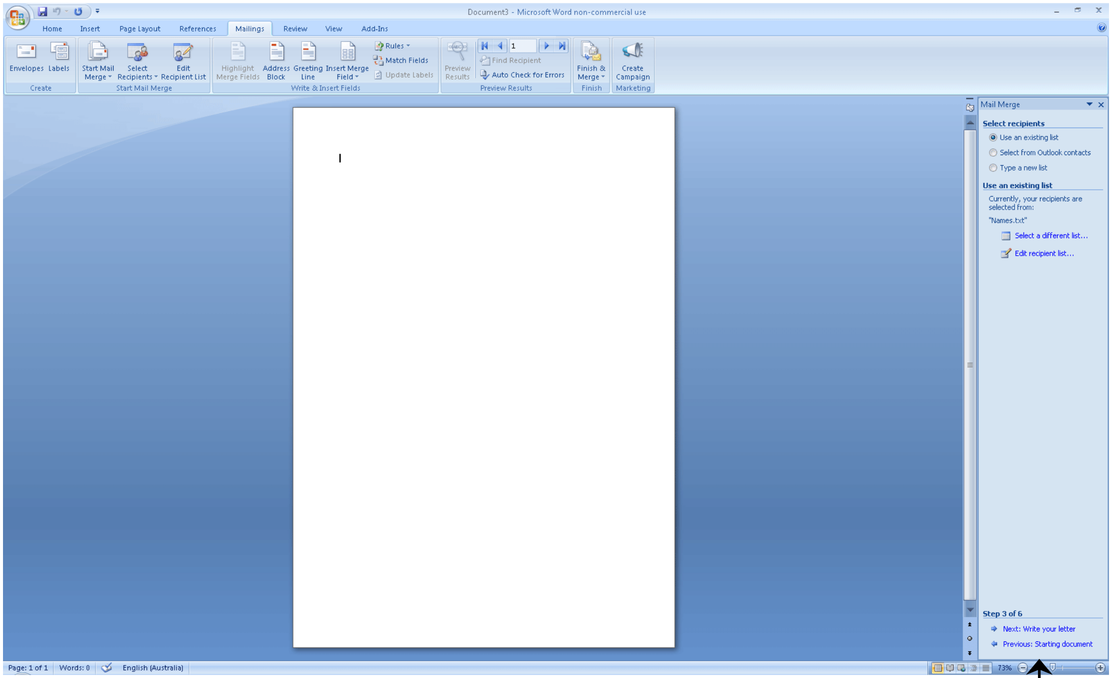
1. Select the required information from a report (for instance the Patient List report) and click the **Mail Merge** button.
2. Select **MS Word Document** and click **OK**.
3. From the **Save in** drop-down box select the location where you wish to save the patient details e.g. My Documents.



4. Enter a name in the **File name** field and click **Save** to complete.
5. **Microsoft Word®** will automatically open (if it is installed). A new document called **Document1** will appear.
6. Go to the **Start Mail Merge** menu and select **Step by Step Mail Merge Wizard**.



7. The **Mail Merge Helper** will appear on the right hand side of the document.



Six steps to complete mail merge

8. Follow through the 6 steps in the bottom right hand corner of this screen.

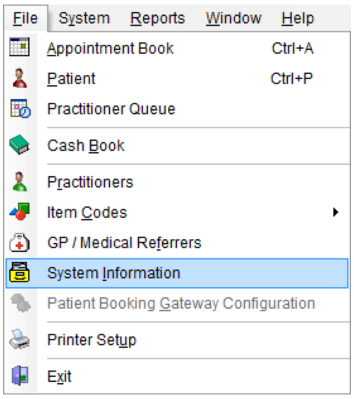
ADVANCED FEATURES

Advanced Tab (System Information)

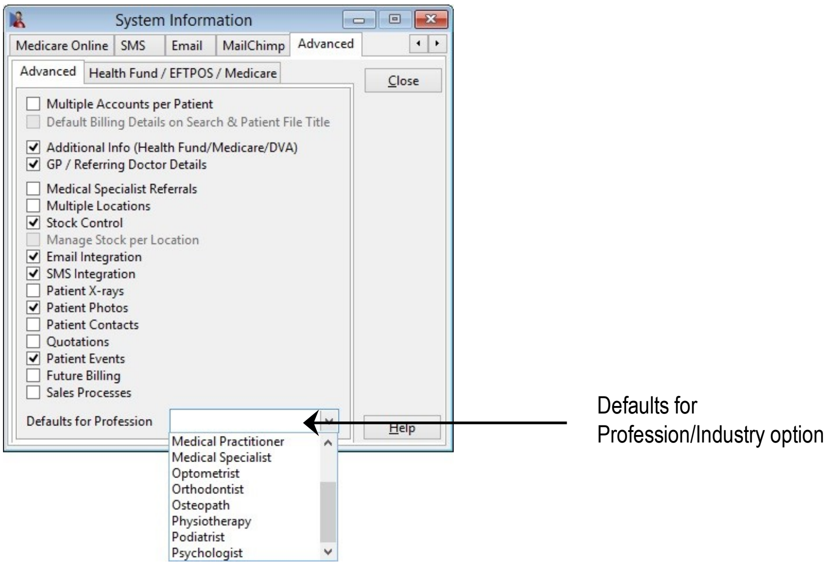
To enable any of the advanced features you will need to be logged on as the **Admin** user.

Click **System Information** from the **Toolbar**,

or from the **File** menu.



Select the **Advanced** tab from the **System Information** window.



The **Advanced** tab enables users to customise several advanced features of *Front Desk 2017*. To select the basic features applicable for a profession, select the profession from the **Defaults for Profession/Industry** drop-down box.

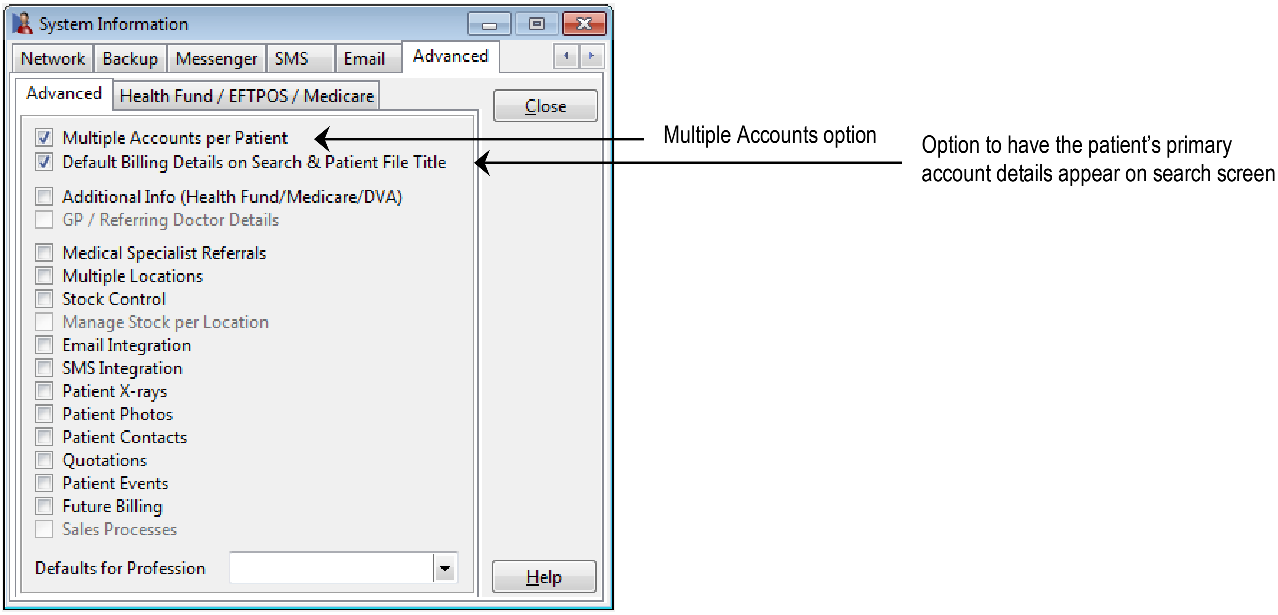
Front Desk 2017 - Note

If you select any of the advanced options you will be asked to restart *Front Desk 2017* for the changes to take effect. We strongly recommend that you discuss your requirements with Smartsoft prior to making any changes on the advanced option tab.

ADVANCED FEATURES

Advanced Tab (System Information)

Select the **Advanced** tab in **System Information**. The **Multiple Accounts per Patient** option should be enabled if patients require more than one account per patient file e.g. a private account and a WorkCover account. This is an advanced option, which should only be used if your practice regularly has patients who need to bill to more than one entity concurrently. The alternative is to have more than one patient file for these patients.

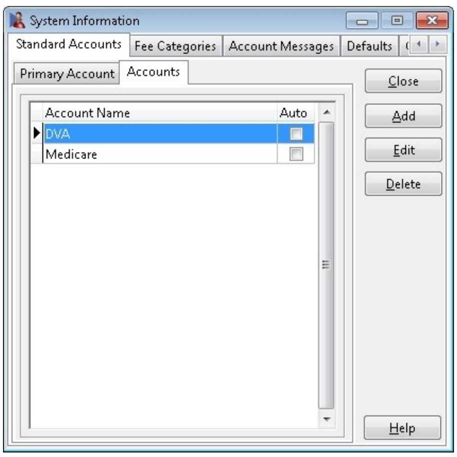


Select the **Default Billing Details on Search & Patient File Title** option to display the primary account details when searching for a patient and in the patient card title. Otherwise, the patient's general details will be displayed.

You will need to restart *Front Desk 2017* for these changes to take effect.

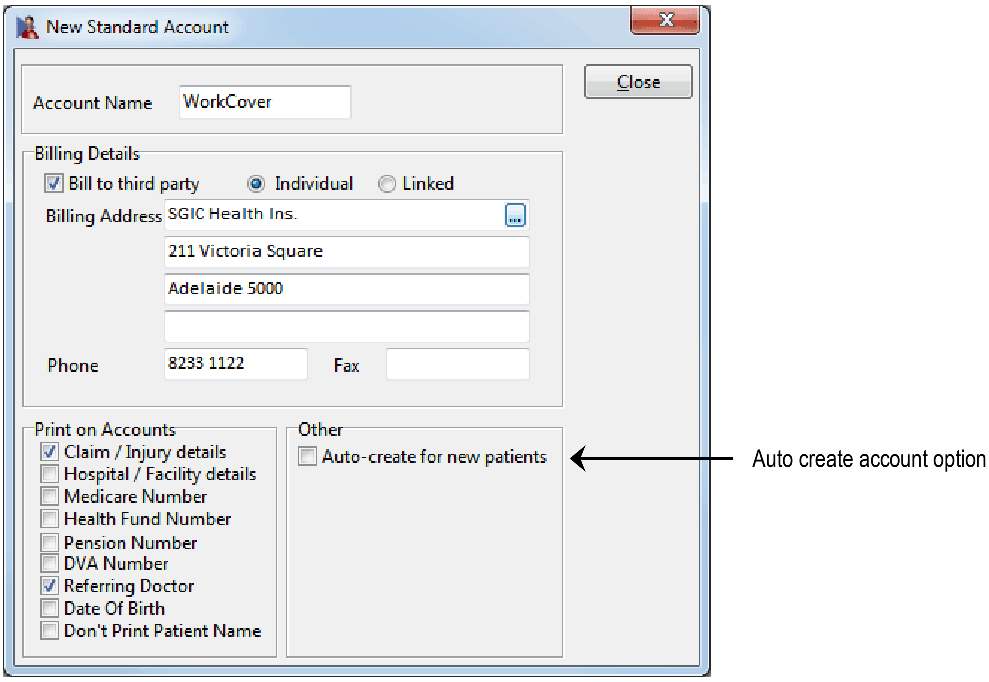
A **Standard Accounts** tab will now appear in **System Information**. Standard accounts allows you to create accounts that are used on a regular basis.

Select the **Accounts** tab and click the **Add** button to create a new standard account.



Multiple Accounts (System Information)

A **New Standard Account** screen will appear as below. Type in the **Account Name** and select the **Bill to Third Party** option to enter the account details.



Select **Individual** for accounts to a 3rd party which require an individual statement or invoice for each patient, or alternatively select **Linked** for all linked patient accounts to be printed on one statement or invoice with each patient listed individually.

If you select the linked option, you will need an existing account to link to in the system beforehand, then use the browse button [...] located at the end of the first **Billing Address** line to search for the account using the **Search on Patient** screen.

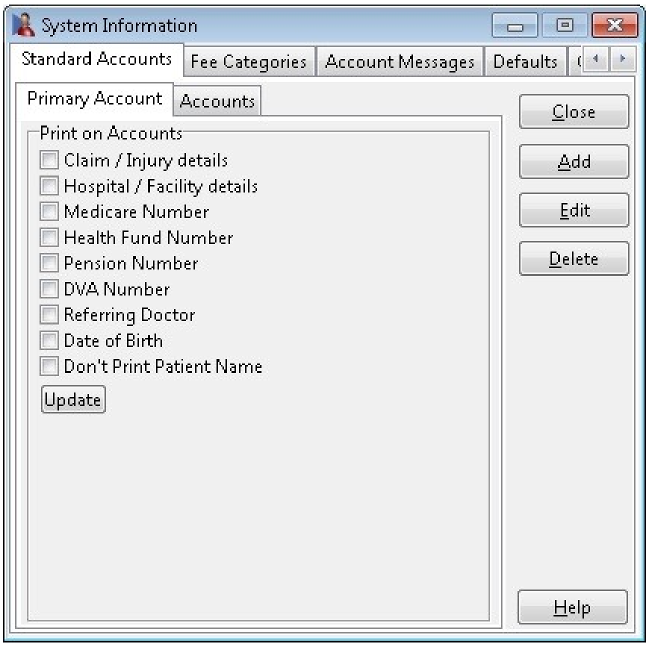
Select the details from the **Print on Accounts** section that are required by the 3rd party biller. For example, WorkCover may require **Claim / Injury details** but not the **Medicare Number** to be printed on accounts and statements.

If this account is required for all new patients, check the **Auto-create for new patients** option to automatically create the account on all new patient cards.

To edit or delete the details of a standard account, click **Edit** or **Delete** on the **Standard Accounts** tab in **System Information**.

Multiple Accounts (System Information)

Select the **Primary Account** tab. This section defines the default details printed on receipts, accounts, invoices and statements when billing on a patient's primary account.

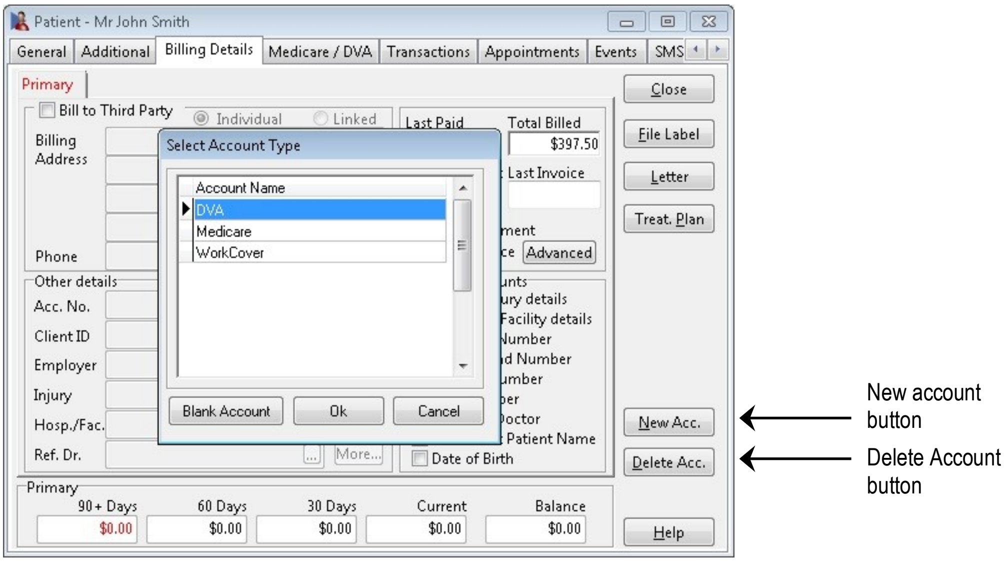


When you have made changes to the **Print on Accounts** option, all future patient files will have these options for their primary account. Click the **Update** button to update all primary accounts for existing patients with these options.

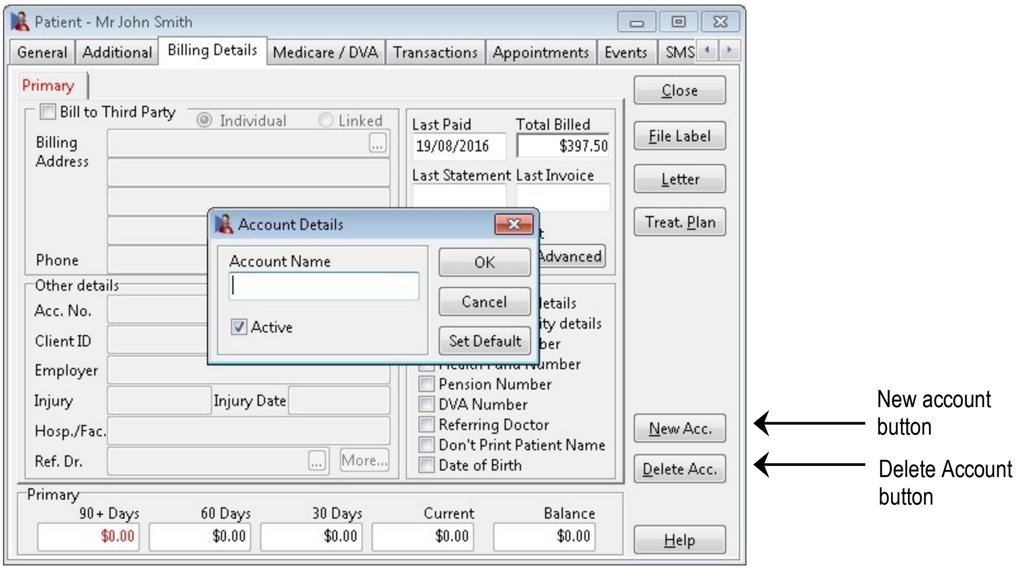
Click **Yes** to update or **No** to cancel.

Multiple Accounts (Patient File)

To create a new billing account for a patient, go to the **Billing Details** tab and click **New Acc.** A billing account allows a patient to bill amounts to different entities such as WorkCover, Medicare etc, as well as to a private account.



From the account type screen you can either select a previously created standard account or a **Blank Account**. If you select a **Blank Account**, you will be prompted for the account name.

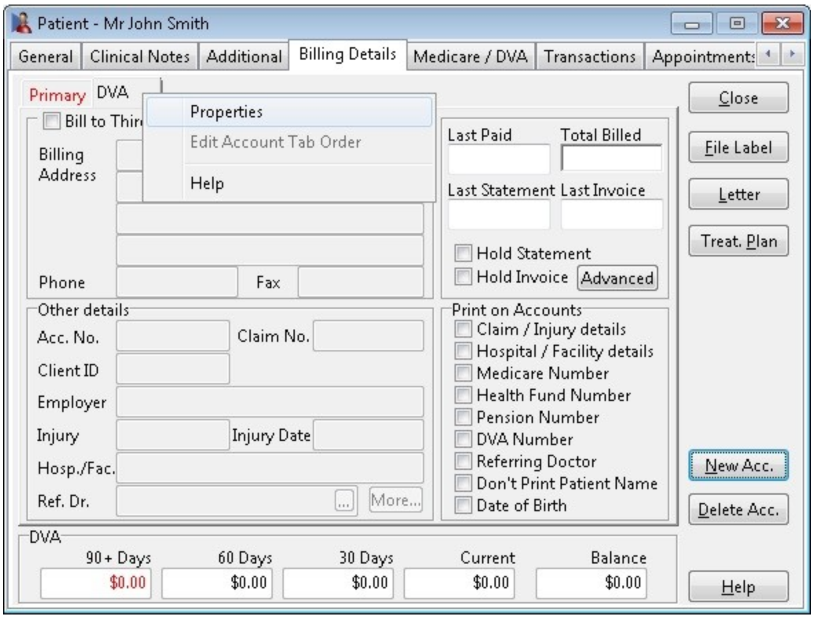


To remove an account select the appropriate tab and click the **Delete Acc.** button.

Note that the account details such as the aged balance at the bottom of the patient card, **Last Paid**, **Total Billed**, **Last Statement/Invoice** and the **Hold Statement/Invoice** are specific for the current selected account on the **Billing Details** tab. When your system has been set up for multiple accounts the standard **Letter** and **File Label** functions also print the details which are specific to the selected patient billing account.

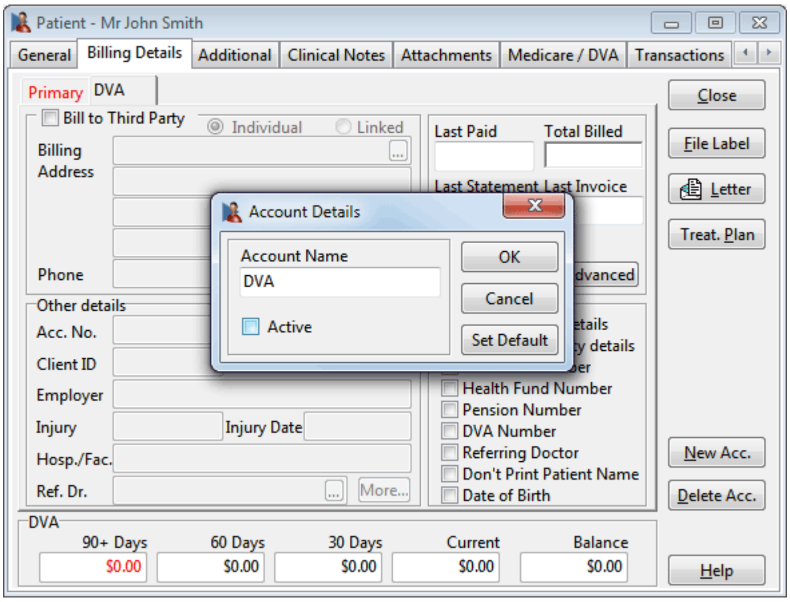
Multiple Accounts (Patient File)

To edit an account name or to set a default account, right click on the **Account** tab and select **Properties**.



The **Account Details** screen will appear as shown below. Click **Set Default** to make this account the default. The default account will be highlighted in red and will be ordered as the first account.

To make the account inactive uncheck the **Active** checkbox.

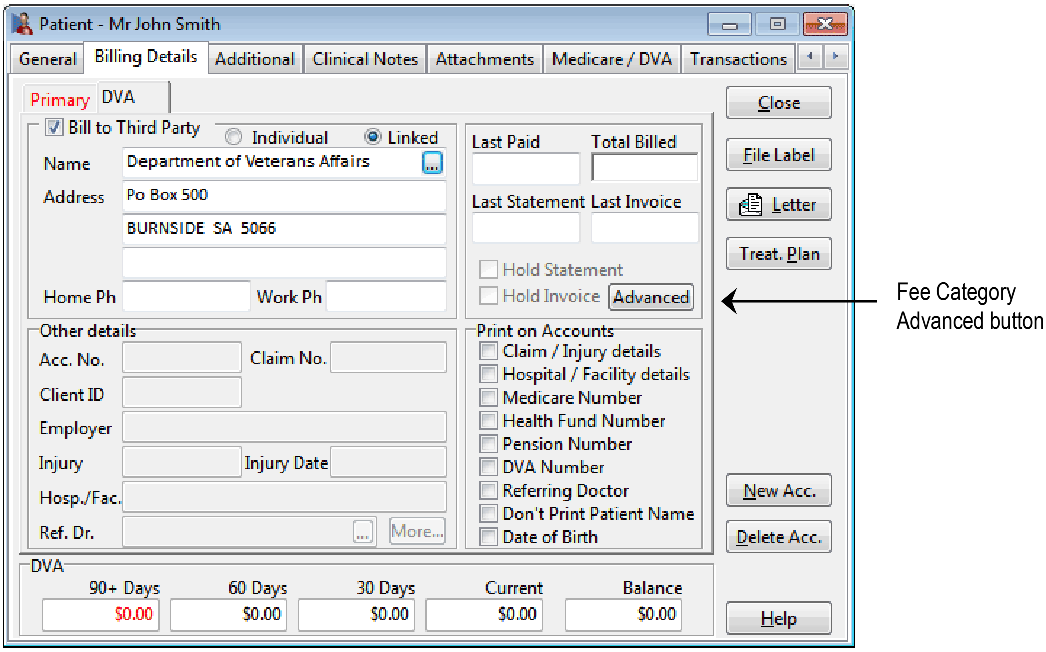


The ordering of billing accounts can be adjusted by right-clicking on an account and selecting **Edit Account Tab Order**.

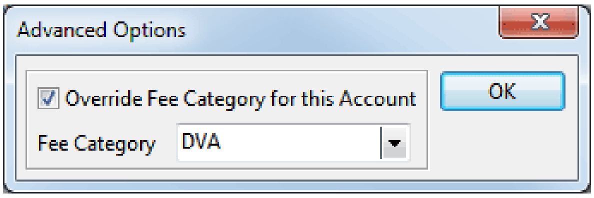
ADVANCED FEATURES

Multiple Accounts (Patient File)

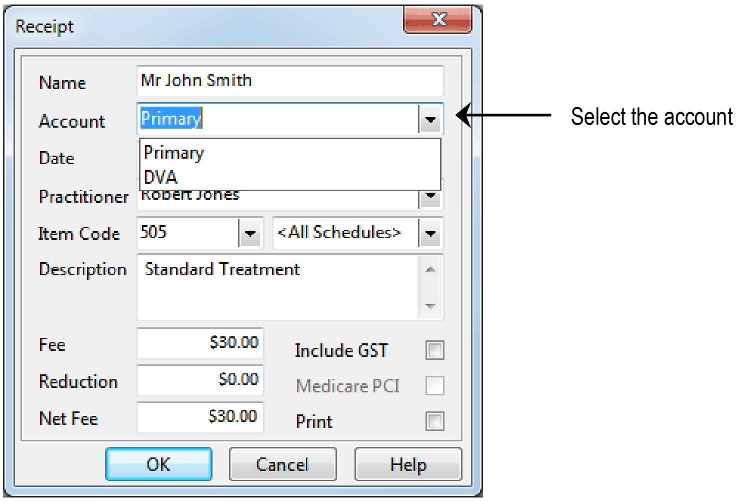
A patient with multiple accounts will most likely require a separate fee category for each account. To set these fee categories per account, click the **Advanced** button.



Tick the option below and select the appropriate fee category from the drop-down box.

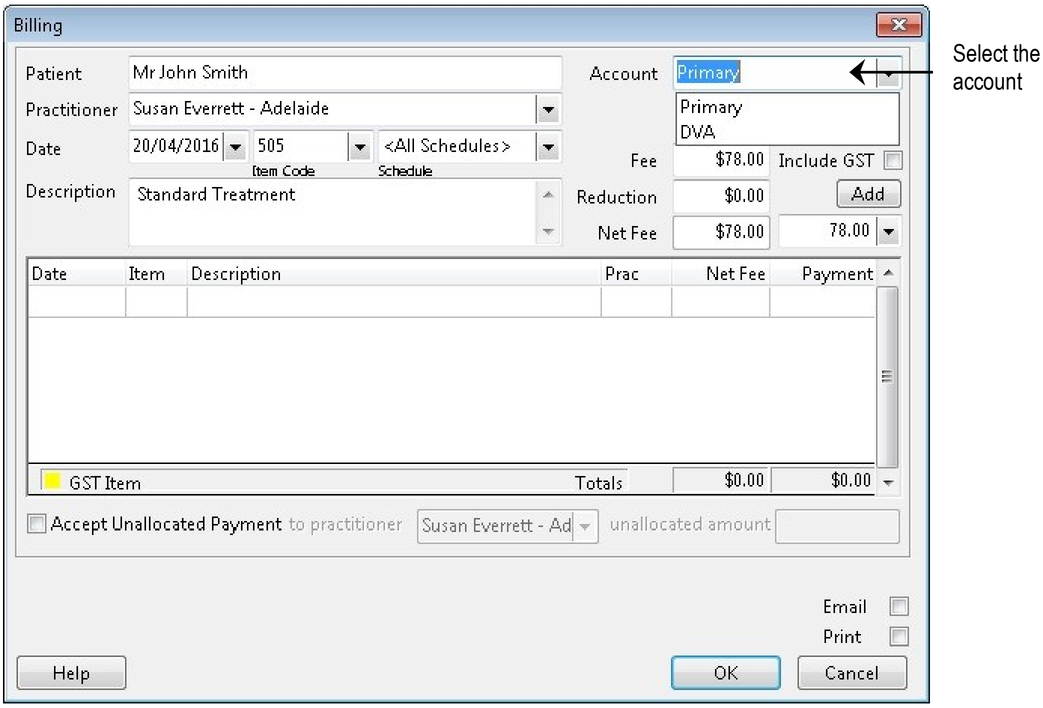


When billing or receipting a patient with multiple accounts, the default billing account will be selected. You may change the account by clicking on the **Account** drop-down box and selecting the appropriate account.



Multiple Accounts (Patient File)

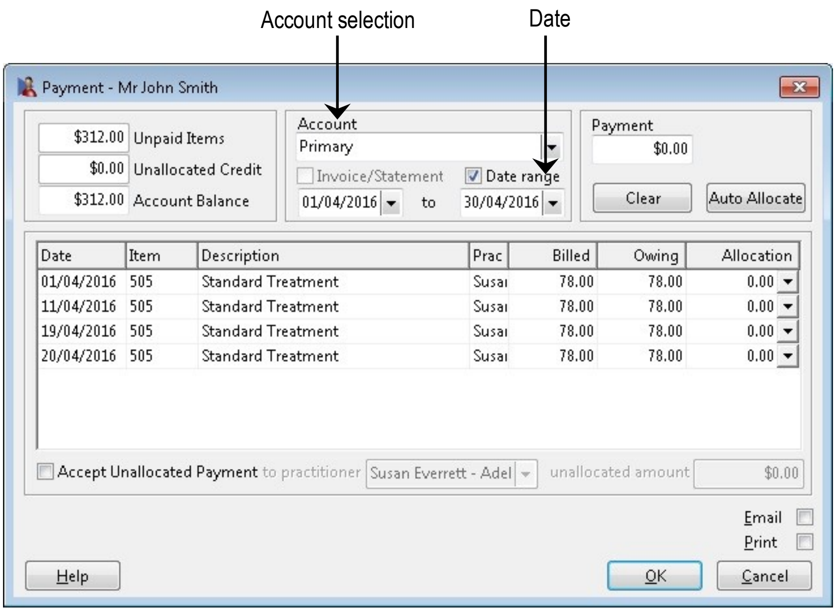
Note that once a billing item has been added, you will be unable to change the account field during the billing process.



When using the multiple accounts option and a patient has more than one account, the **Payment** screen allows you to choose the appropriate account to be used to record a payment.

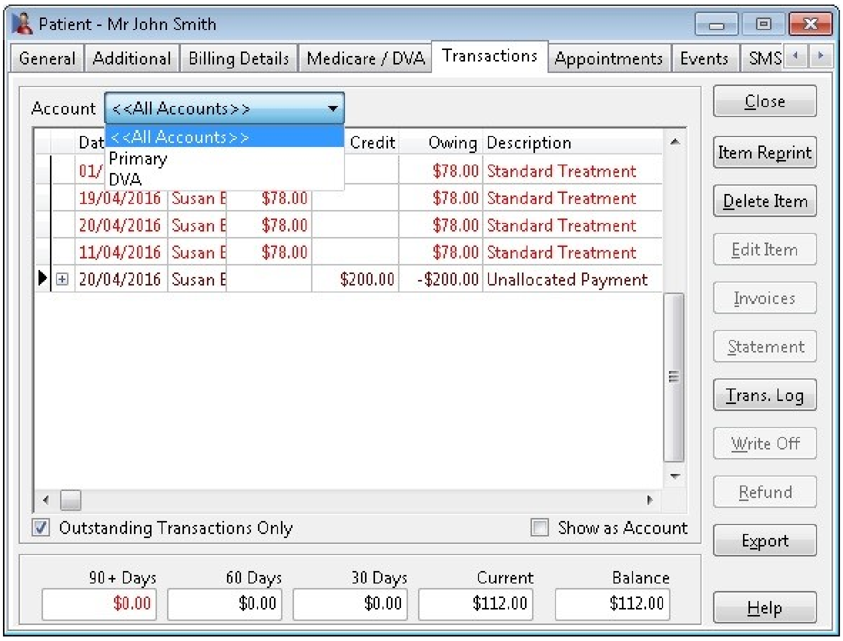
The payment screen has an **Account** drop-down box, which allows you to select a particular account. The outstanding amounts for that account only will be displayed.

Select the date range to further filter outstanding amounts during a period of time.

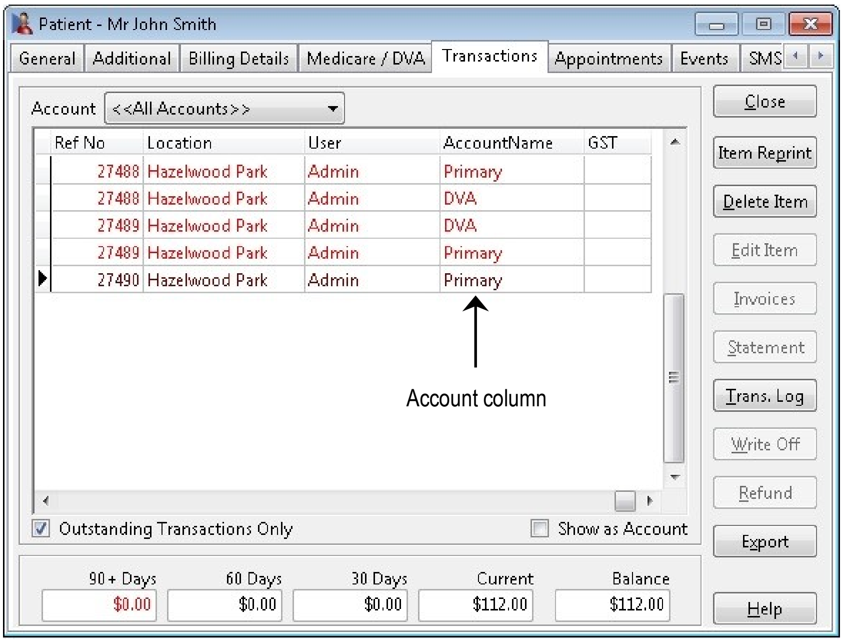


Multiple Accounts (Patient File)

In the **Transaction** tab of the patient card you can view transactions for **<<All Accounts>>** or for one account only. Select the account from the **Account** drop-down box. This will list only those transactions for that particular account or all transactions if **<<All Accounts>>** is selected. Note that the aged balance at the bottom of the patient screen will display the balances for the selected account.



If **<<All Accounts>>** is selected, the **Account** column will display the billed to account for each transaction.

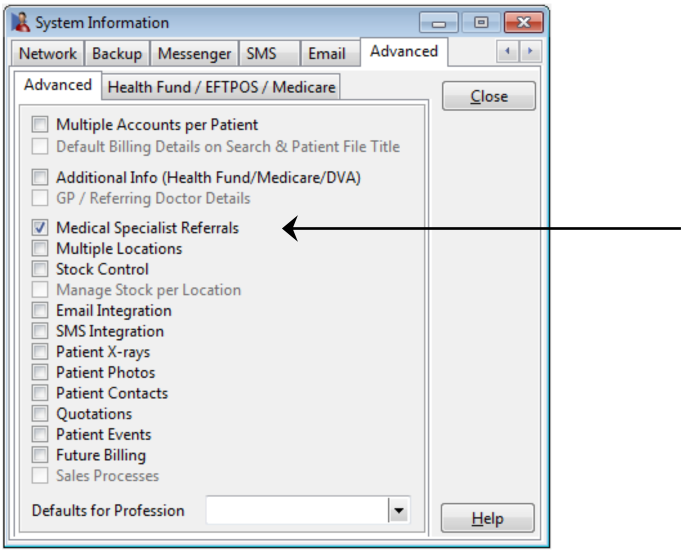


ADVANCED FEATURES

Medical Specialist Referrals (System Information)

Select the **Advanced** tab in **System Information**. The **Medical Specialist Referrals** option should be enabled for medical specialist billing.

Do not enable this feature for Allied Health professionals.



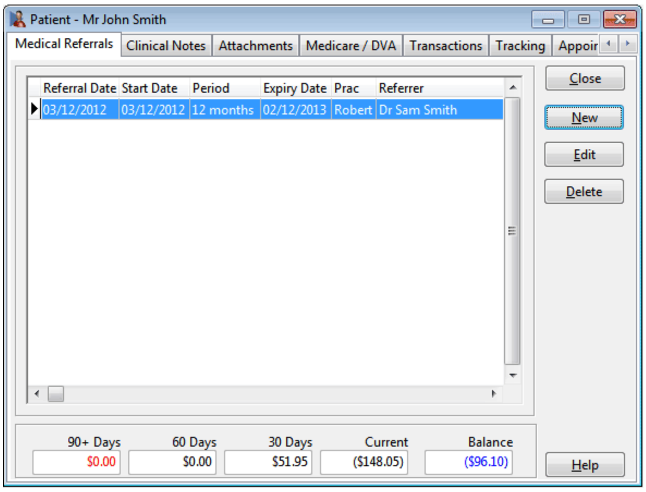
Medical Specialist Referrals option

Front Desk 2017 - Note

A simplified medical referral functionality is provided for Allied Health billing by default in Front Desk®.

After restarting *Front Desk 2017* a new **GP / Medical Referrers** icon will appear on the **Toolbar**

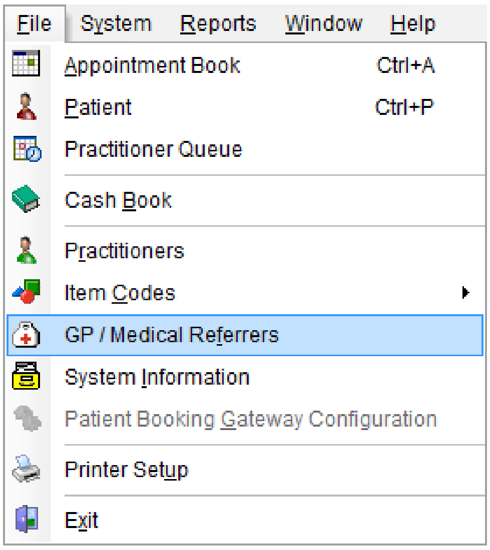
and the **Medical Referrals** tab will be added to the patient card.



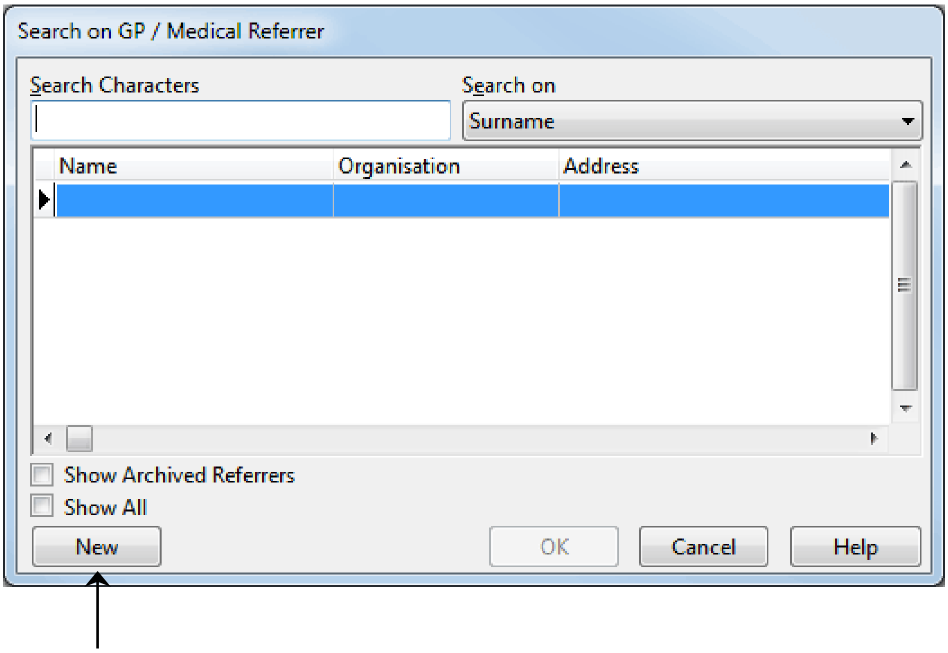
Medical Specialist Referrals

To add a medical specialist referrer, select **GP / Medical Referrers** from the **Toolbar**

or from the **File** menu.



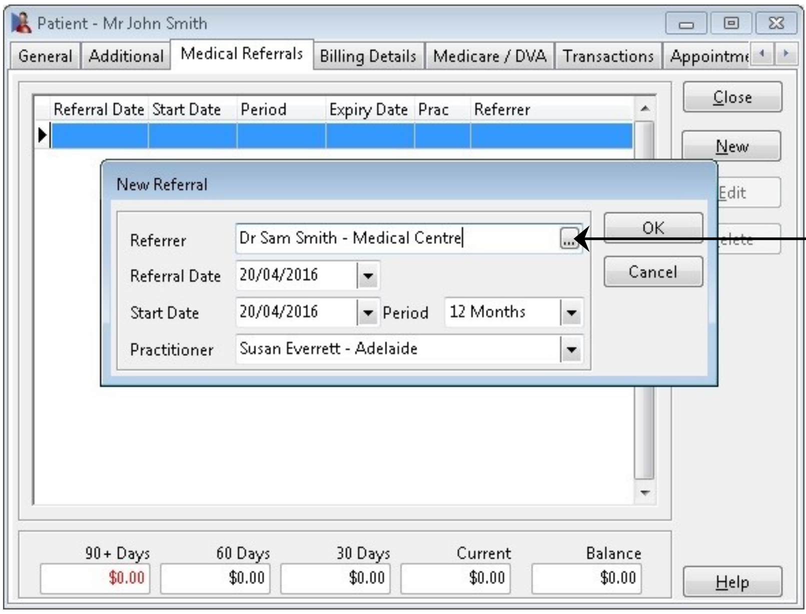
The following screen will appear. Click **New** to create a referrer.



Click **New** to add a referrer

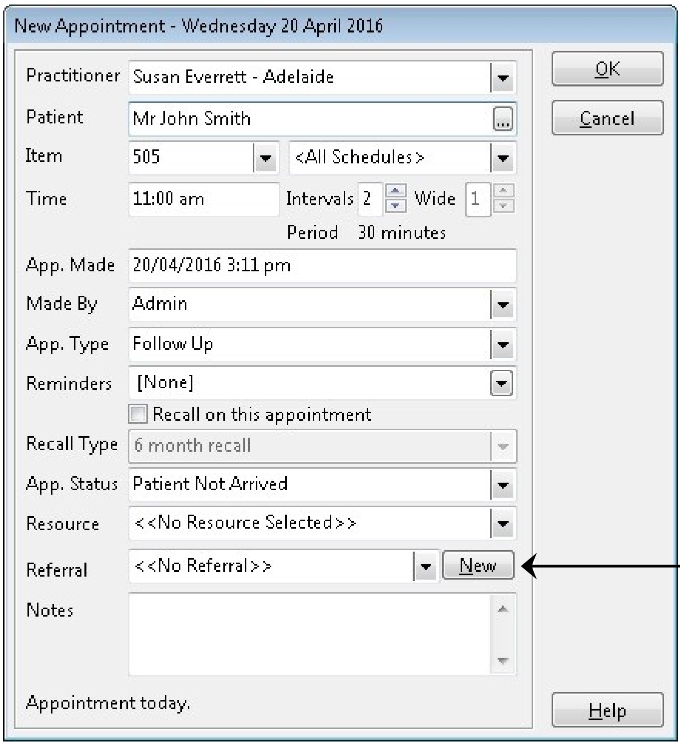
Medical Specialist Referrals

A referrer may be also added directly from the **Patient** screen when adding **Medical Referrals**. On the **Medical Referrals** tab, click the **New** button. To view a list of currently entered GPs/Referrers select the browse button to bring up the **Search on GP/Referrers** screen. To enter a new referrer, click the **New** button.



Click the browse button to search for a referrer

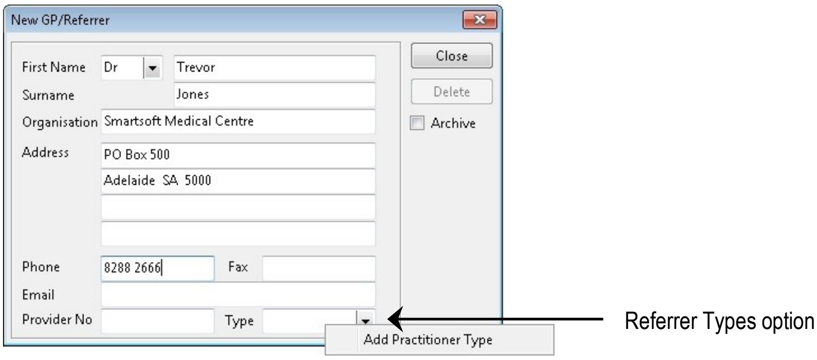
Referrers can also be added when making an appointment on the **New Appointment** dialog. Click the **New** button to the right of the **Referral** field to bring up the **Search on GP/Referrers** screen. To enter a new referrer click the **New** button on the bottom left corner of this screen.



Click the New button from the New Appointment screen to create a referrer

Medical Specialist Referrals

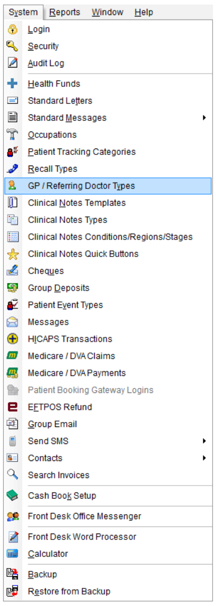
Enter the details of the referrer in the **New GP/Referrer** screen.



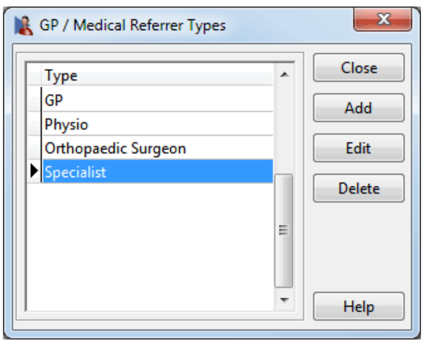
The **Type** field allows you to select the type of referrer e.g.GP, Medical Specialist, Optometrist, etc. To create a new referrer type, right click on the **Type** field and select **Add Practitioner Type.**

GP / Referring Doctor Types

To add new types select **GP/Referring Doctor Types** from the **System** menu.

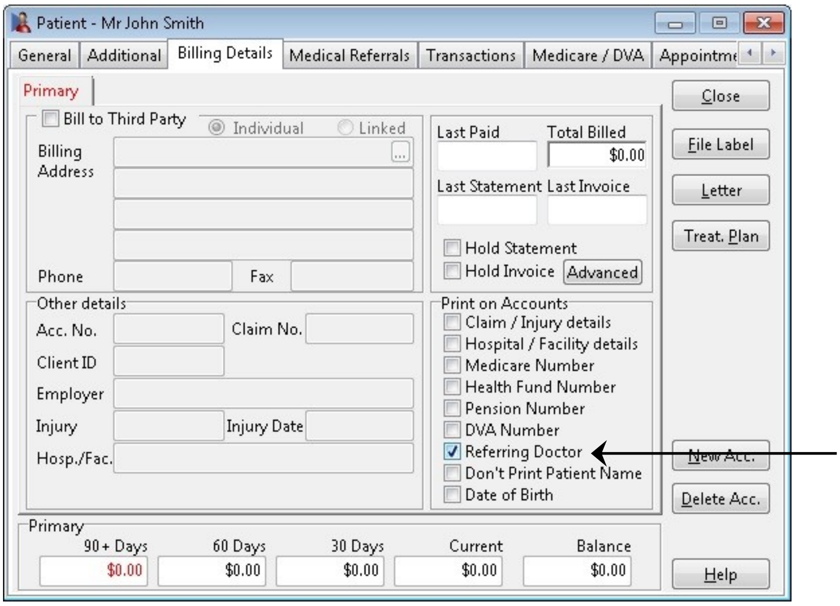


To create a referrer type click **Add**, to change a referrer type click **Edit** or to remove a referrer type click **Delete**.



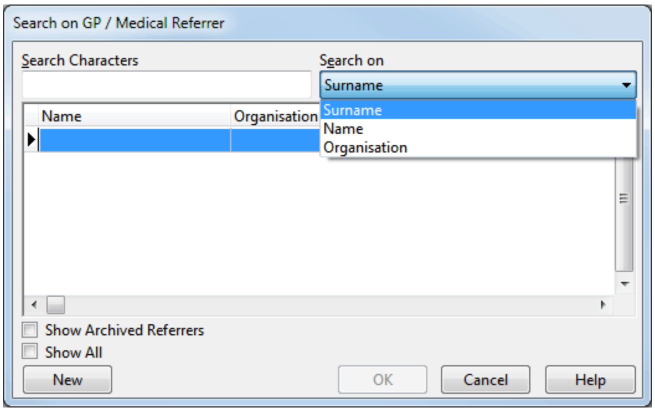
Medical Specialist Referrals

To print out the referring doctor on patient’s receipts, accounts, payments, statements and invoices go to the **Billing Details** tab of a patient’s card and select **Referring Doctor** in the **Print on Accounts** section.

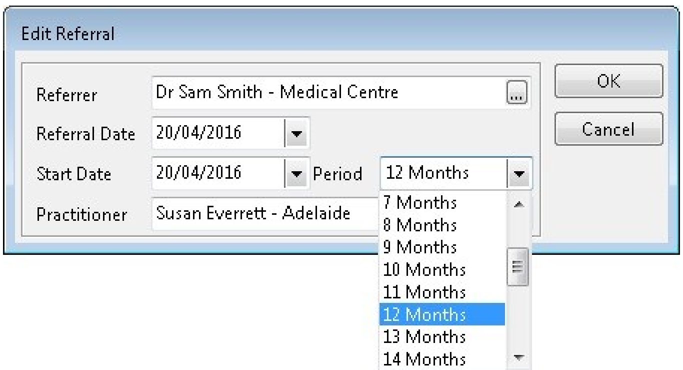


Select this option to print the referring doctor on accounts

When searching for a referrer you can search by first name, surname or organisation.

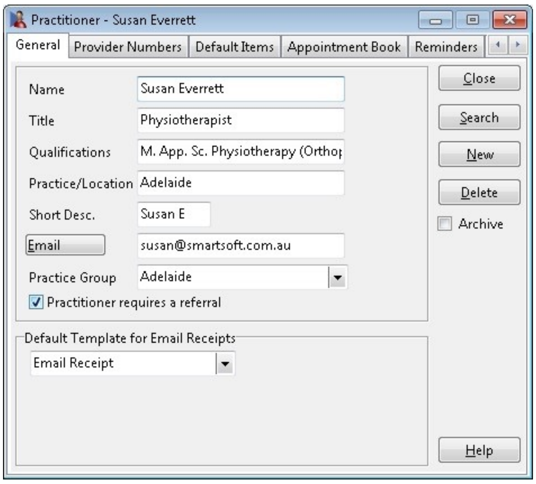


When adding a referrer into a patient’s card you need to specify the period of the referral and set a start date. Use the drop-down boxes to change these settings.

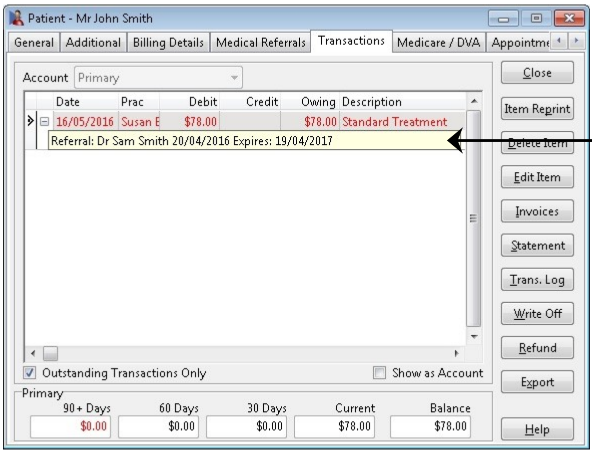


Medical Specialist Referrals

If a practitioner always requires a referral select the **Practitioner requires a referral** option on the practitioner's file.

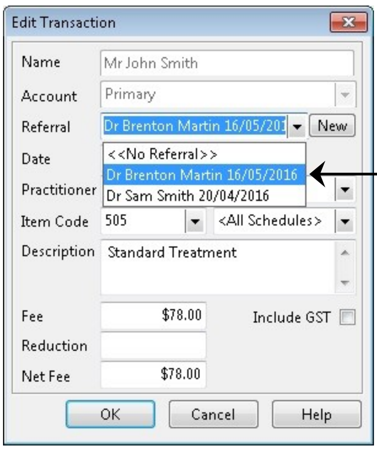


If a patient has referrals associated with their transactions the referral information can be viewed in the transaction tab of the patient card. To view the details of a referral, click on the plus (**+**) located on the left hand side of the invoiced item.



View referral information

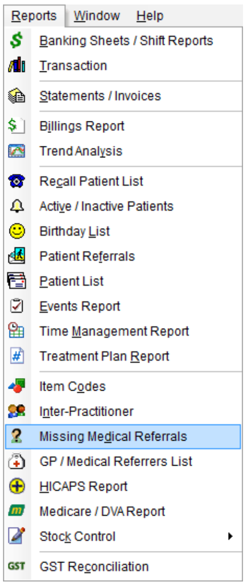
The **Edit Transaction** window also allows editing of the referrals.



Change the referrer in the Edit Transaction screen

Missing Medical Referrals

To generate a report on any medical referrals that have not been used, go to the **Reports** menu and select **Missing Medical Referrals**.



The following **Missing Medical Referrals Report** will appear.

Select which missing referrals you wish to view - either referrals without **Transactions** or referrals without **Appointments** associated with them.

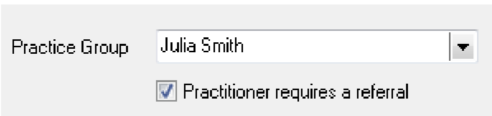
Select the **By Date** option to set a specific date range.

If a **Missing Medical Referral Report** relating to a particular practitioner or practice group is required then select the **By Practice** option and the relevant **Practice Group**, **Reporting Group** or **Practitioner**.

This report may be **Previewed** or **Printed** by clicking these buttons.

Front Desk 2017 - Note

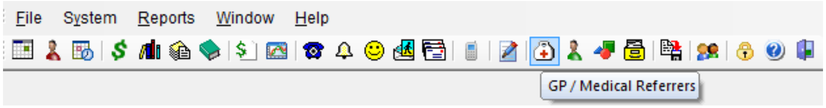
This report will only generate missing referrals if the **Practitioner requires a referral** option is selected on the practitioner's file.



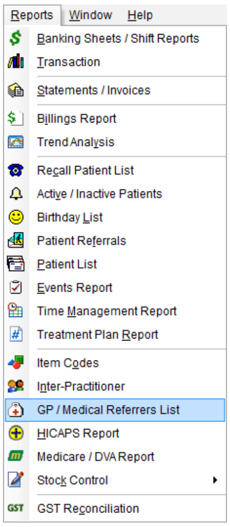
GP / Medical Referrers

GP / Medical Referrers is used to manage the GPs and referring doctors of your patients. Referrers entered in this window are available to select in the **Additional** and **Billing Details** sections of the patient file.

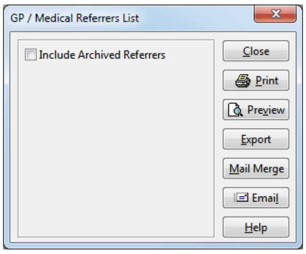
Select **GP / Medical Referrers** from the **Toolbar** to manage the available referrers.



The GP / Medical Referrers can be reported on by selecting **GP / Medical Referrers List** from the **Reports** menu.



The **GP / Medical Referrers List** dialog will appear.



To include archived referrers in the results select the **Include Archived Referrers** option.

This report may be **Printed** or **Previewed** by clicking these buttons.

To export the GP / Medical Referrers List to CSV or Microsoft Excel® click **Export**. An exported file can be used to edit the list for a mail merge.

Click **Mail Merge** to perform a mail merge using the **Front Desk Word Processor** or Microsoft Word®.

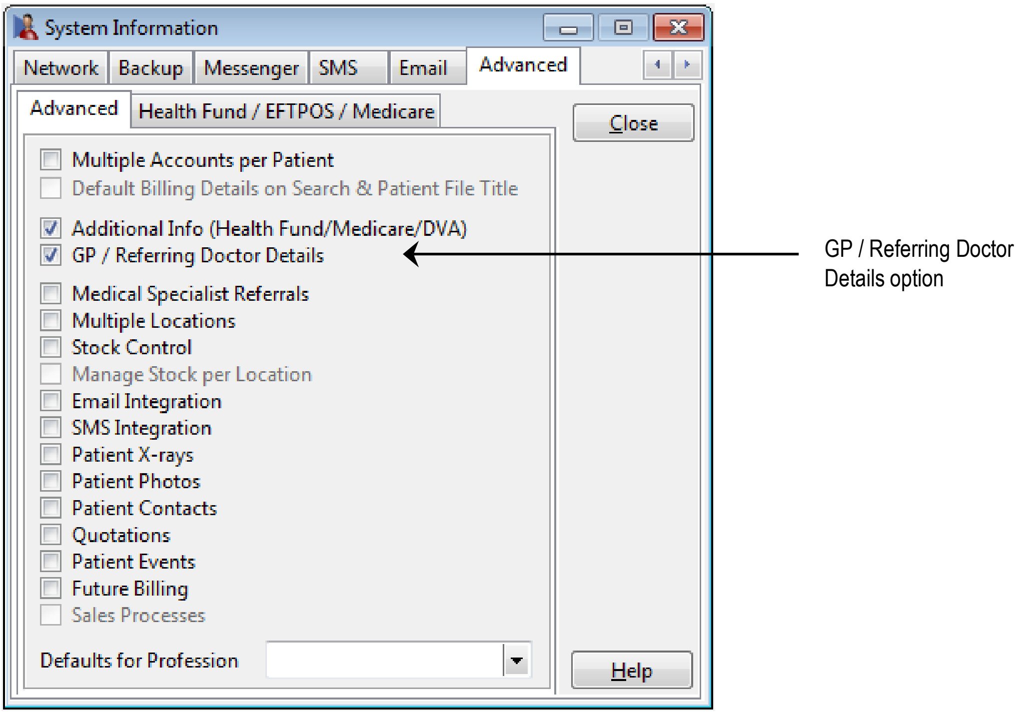
Click **Email** to send an email to those GP / Medical Referrers with an email address.

ADVANCED FEATURES

Additional Information (System Information)

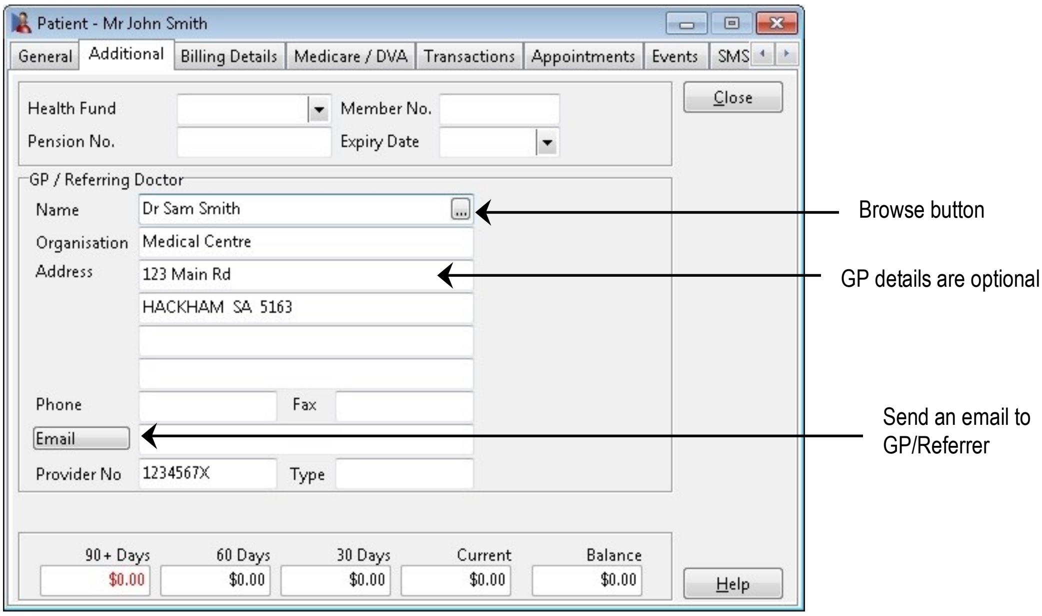
Select the **Advanced** tab in **System Information**. The **Additional Information** option should be enabled if information such as health fund details or pension number needs to be recorded in the patient's file.

It is optional to have the details of the patient's GP on the **Additional** tab. Select the **GP / Referring Doctor Details** option to enable these fields.



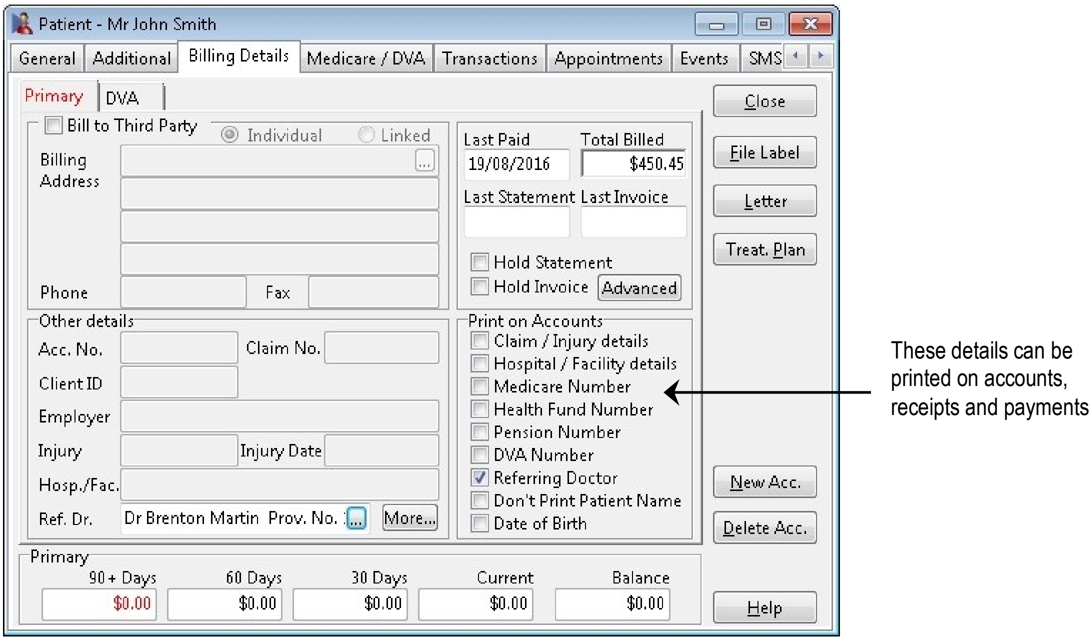
Additional Information (Patient)

An **Additional** tab will now be visible on the patient card as shown below. If the **GP / Referring Doctor Details** option is selected in **System Information** then the **GP / Referring Doctor** section will be enabled. Use the browse button [...] to add a new GP/Referrer or search for an existing one.



If **Additional Information** is enabled, you will have the option to print the additional fields including Medicare, Health Fund, Pension and DVA numbers on receipts, accounts, payments, statements and invoices. Click **Email** to send an email to the GP/Referring Doctor.

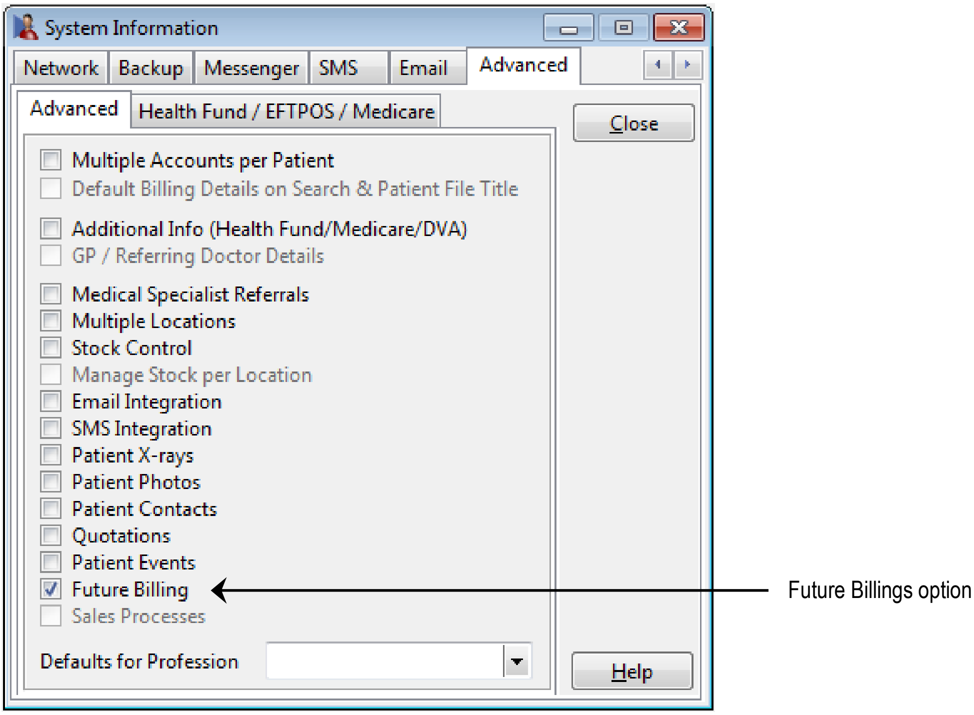
Select the required information from the **Print on Accounts** section under the **Billing Details** tab.



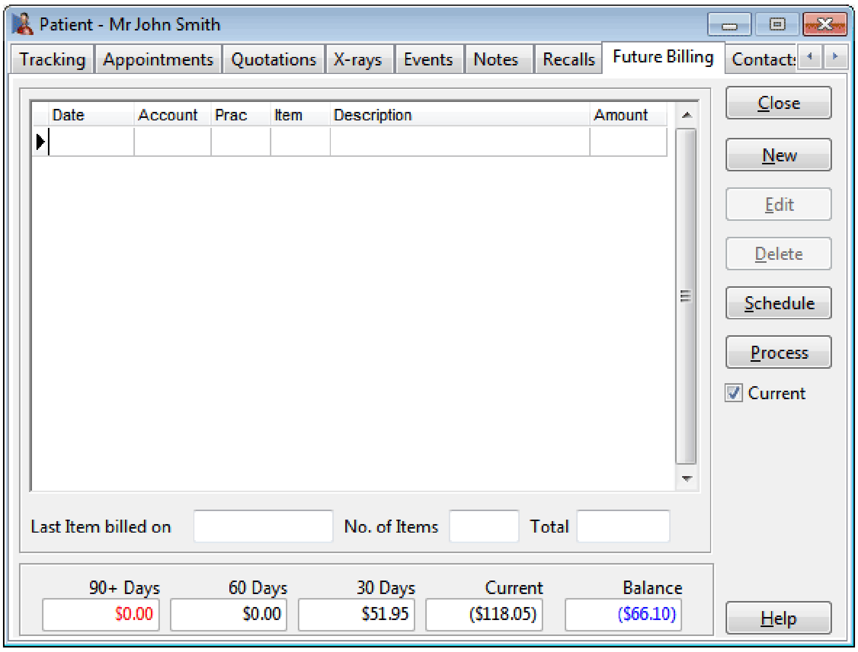
ADVANCED FEATURES

Future Billing (System Information)

Select the **Advanced** tab in **System Information**. The **Future Billing** option can be used by practices that wish to bill items at a future date. This can be helpful when negotiating payments over time with patients for high value services such as Orthodontics. Before enabling this feature we recommend discussing your requirements with Smartsoft.

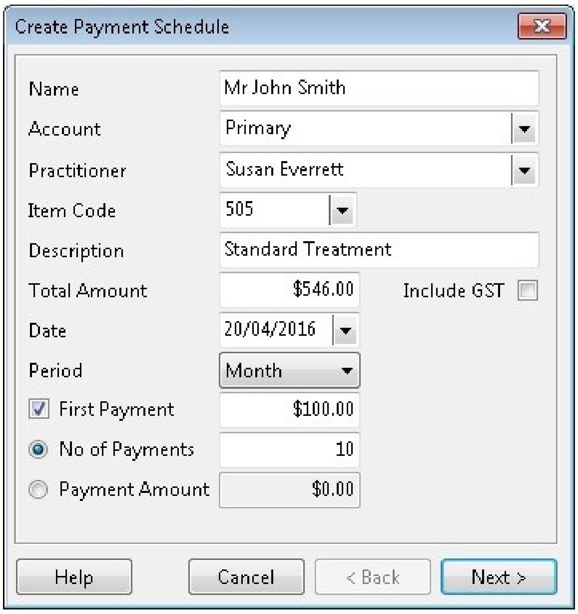


A **Future Billing** tab will be added to the patient's file.

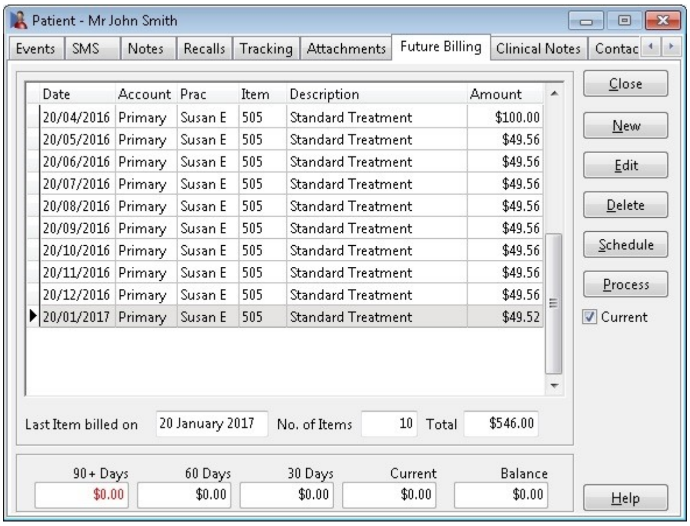


Future Billing (Patient)

To create a payment schedule, click **New** on the **Future Billing** tab on the patient file. The **Create Payment Schedule** dialog will become visible as below. Select the **Practitioner**, **Item Code**, **Total Amount** and **Date** of the service. Then select the **Period** (frequency) for payments to be made e.g. weekly, fortnightly, monthly or quarterly. Enter a **First Payment** (if required) and either an instalment amount (**Payment Amount**) to be made each payment period or the **No of Payments** required.



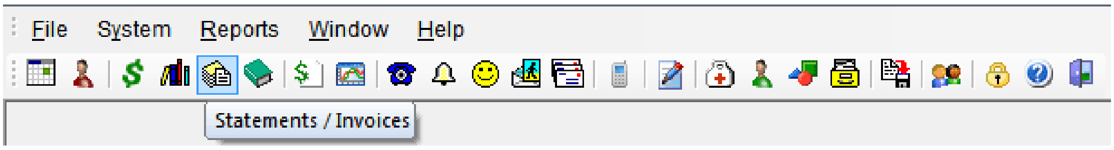
Click **Next** to proceed. A list with all instalment dates and the amount to be paid will appear. Click **Process** to continue. Once these instalments have been processed the list of instalments will be listed in the **Future Billing** tab, as shown below. Future transactions will stay in the **Future Billing** tab until the instalment date, at which time they will become active transactions in *Front Desk 2017* and visible on the patient's **Transaction** tab.



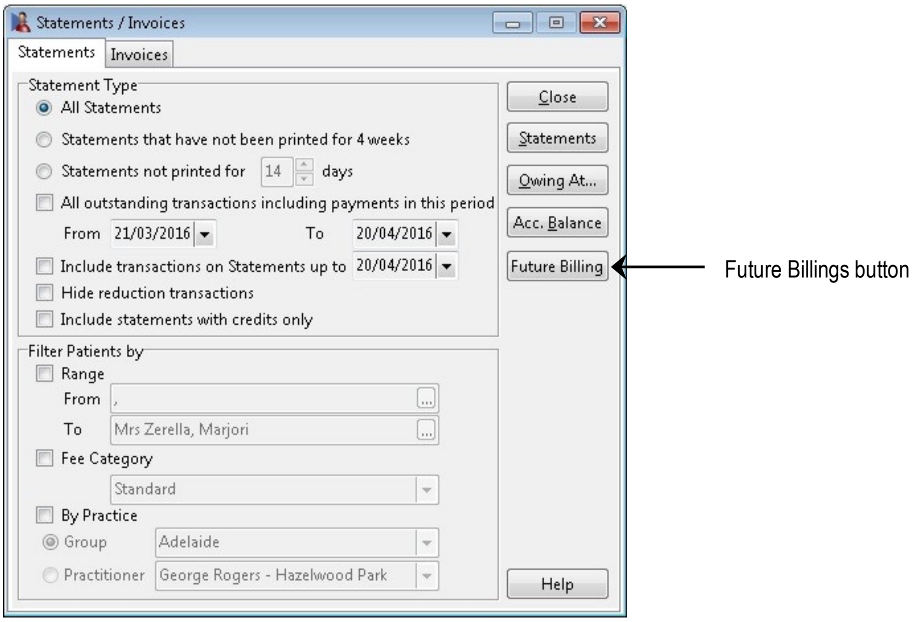
Click **Edit** to change an item and **Delete** to remove an item. The **Schedule** function can be used to print a future payment schedule for the patient.

Future Billings

Migration of future billed items to regular billed transactions occurs only after processing future billings from the **Statement / Invoices** screen.



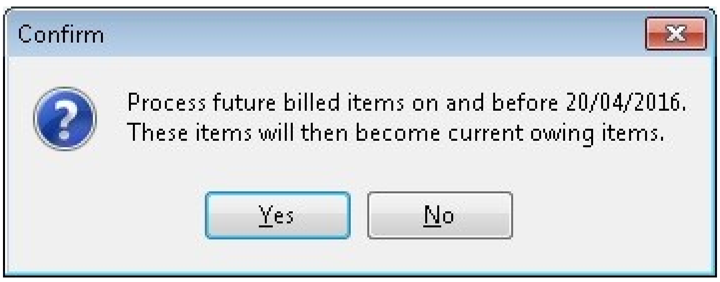
To process future billings click the **Future Billings** button.



The following **Process Future Billings** screen will appear. Select a process date from the drop-down box. This will process all future billings prior to, or on this date.

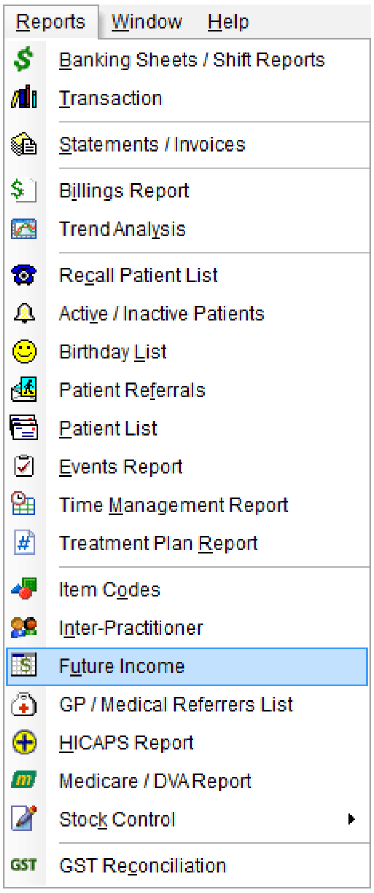
Click **Process**.

The following screen will appear. To confirm that the future billings items will become current click **Yes** or click **No** to cancel.

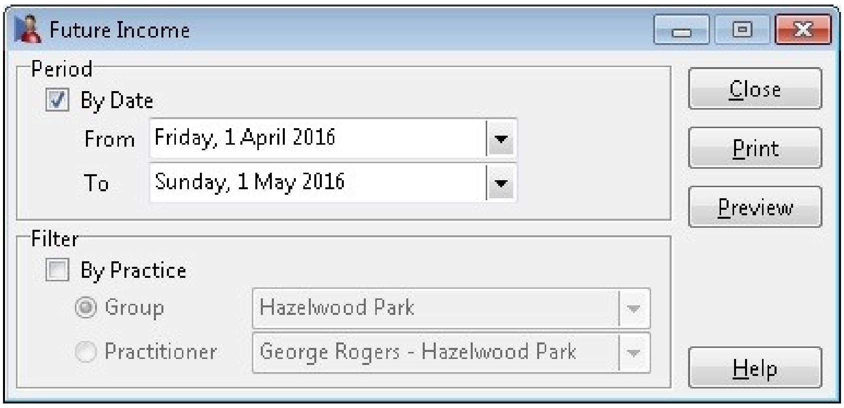


Future Income Report

To generate a future income report, select **Future Income** from the **Reports** menu.



To generate a future income report, select a **From** and **To** date from the **Period** section. If required, this report can be filtered by **Practitioner**, **Practice Group** or by **Reporting Group**.

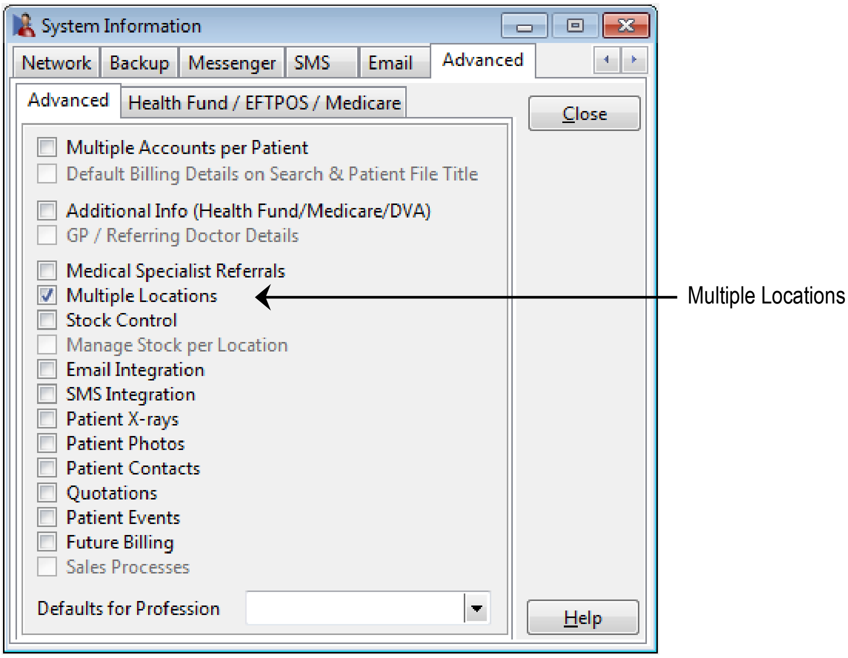


This report may be **Printed** or **Previewed** by clicking these buttons.

ADVANCED FEATURES

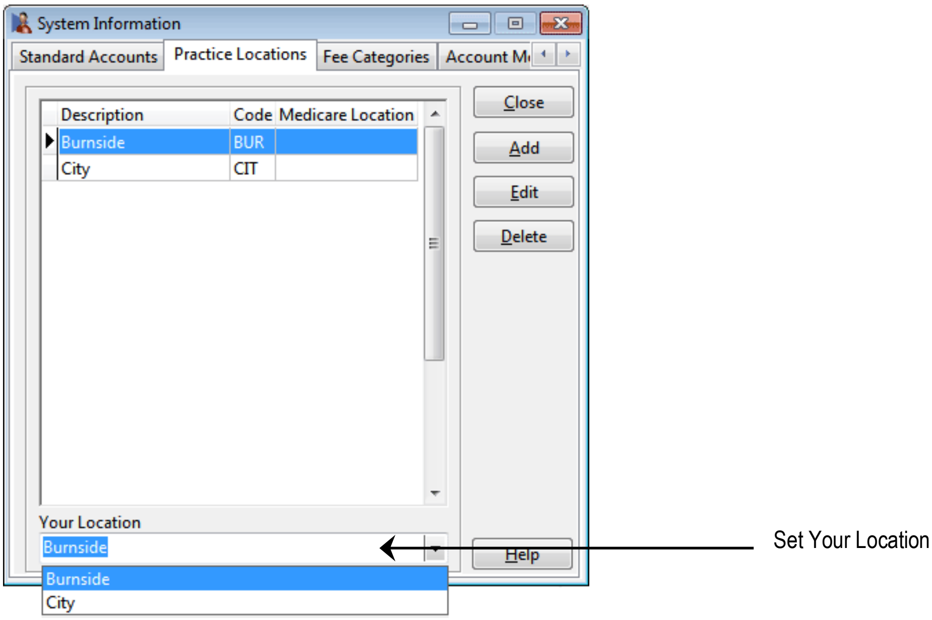
Multiple Locations (System Information)

Select the **Advanced** tab in **System Information**. The **Multiple Locations** option should be used when running *Front Desk 2017* at two or more locations concurrently.



Once this option is selected, you will have the new **Practice Locations** tab in **System Information**. To create a new location click **Add**, to change the description of a location click **Edit** and to remove a location click **Delete**. Select your particular location from the **Your Location** drop-down box.

If **Multiple Locations** has been enabled and **Your Location** has not been selected, a warning will be displayed when starting *Front Desk 2017*, and it will not be possible to process any transactions until this option has been set.



ADVANCED FEATURES

Multiple Locations (Reports)

The following reports can be generated **By Location**:

 **Banking Sheets / Shift Reports**

 **Transactions**

 **Billings Report**

 **Trend Analysis**

 **Treatment Plan Report**

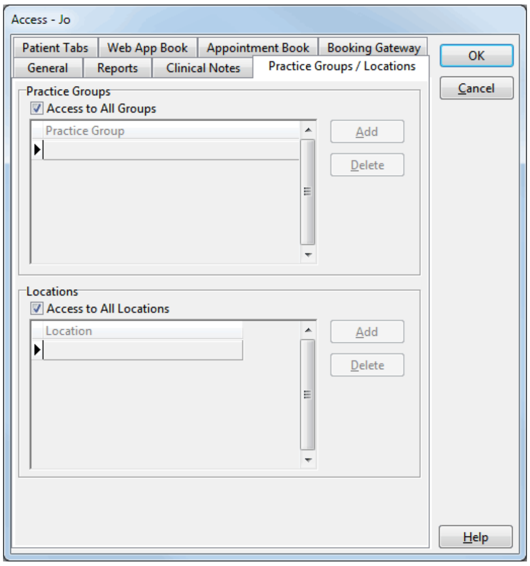
 **HICAPS Report**

 **Tyro Healthpoint Report**

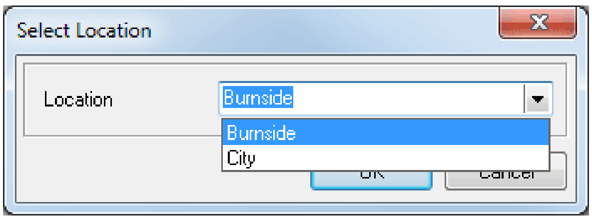
 Multiple Locations (Security)

Select **Security** from the **System** menu. To give access to users for a particular location only, select the username and click **Access**.

Select the **Practice Groups / Locations** tab.



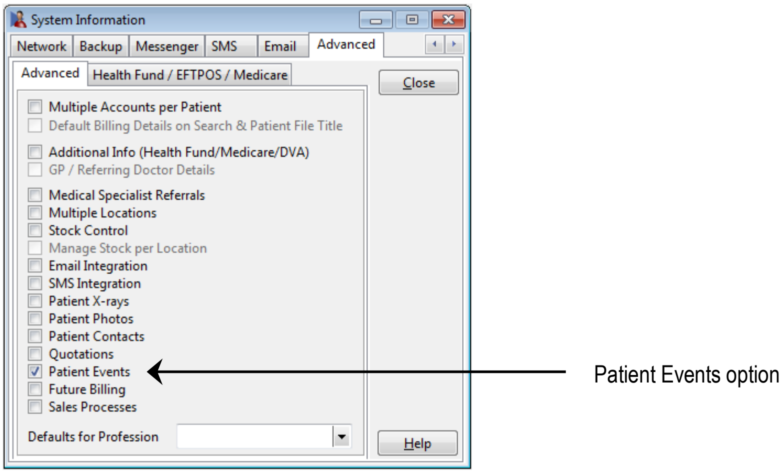
By default, **Access to All Locations** will be selected. If a user only requires access to a particular location(s), untick this option and click **Add** then select the **Location** from the drop-down box.



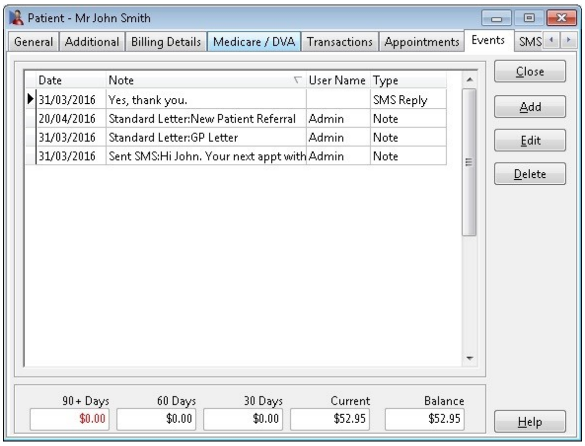
Repeat this step if this user requires access to other locations.

Patient Events

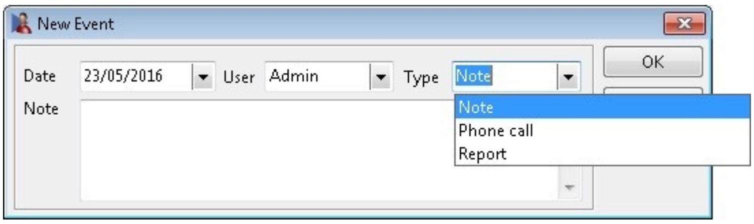
Select the **Advanced** tab in **System Information**. Enabling **Patient Events** allows specific events to be recorded in a patient file. For example, recording the sending of a letter to the patient's GP.



From the patient file select the **Events** tab. Patient Events can be ordered by clicking the **Date**, **Note**, or **User Name** column header.



To enter an event, click **Add**. The following screen will appear.



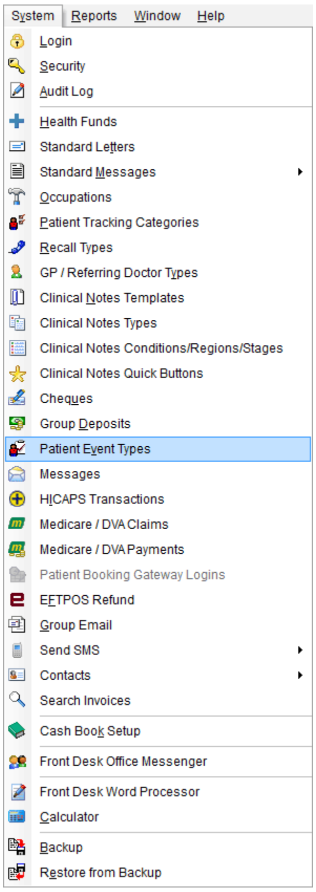
Select the date, the user, the event type and any notes that are required.

Front Desk 2017 - Note

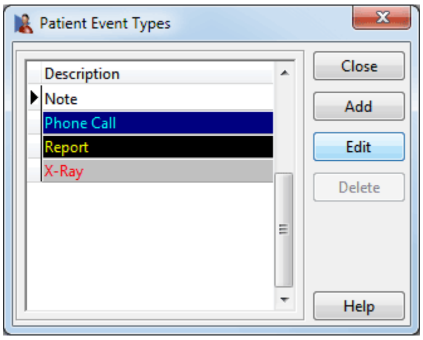
If you have **Email** and / or **SMS** enabled, a patient event will automatically be generated in the patient's card when a message is sent. Patient events are also automatically added when a **Standard Letter** is generated and saved as an attachment.

Patient Event Types

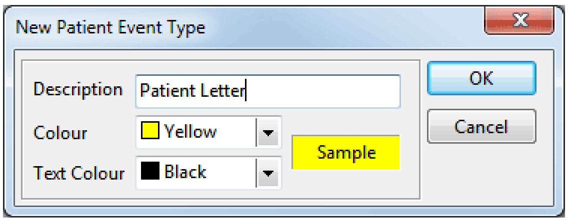
To create patient events, select **Patient Event Types** from the **System** menu.



The following window will appear.

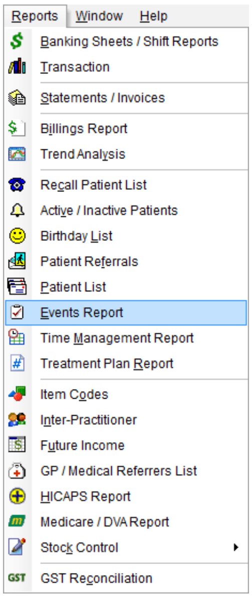


To create a patient event, click **Add**. To change an existing event click **Edit** and to remove an event click **Delete**.

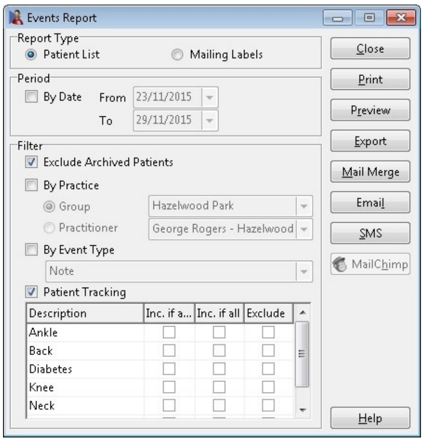


Patient Events Report

To generate a patient events report, select **Events Report** from the **Reports** menu.



The following window will appear.



Select the **Report Type** and then set the date range you wish to view. Select the **By Practice** option to view only the patient events relating to a particular **Practitioner** or **Group**.

If you wish to generate a report by a particular event type, select **By Event Type** and from the drop-down box select the required event type.

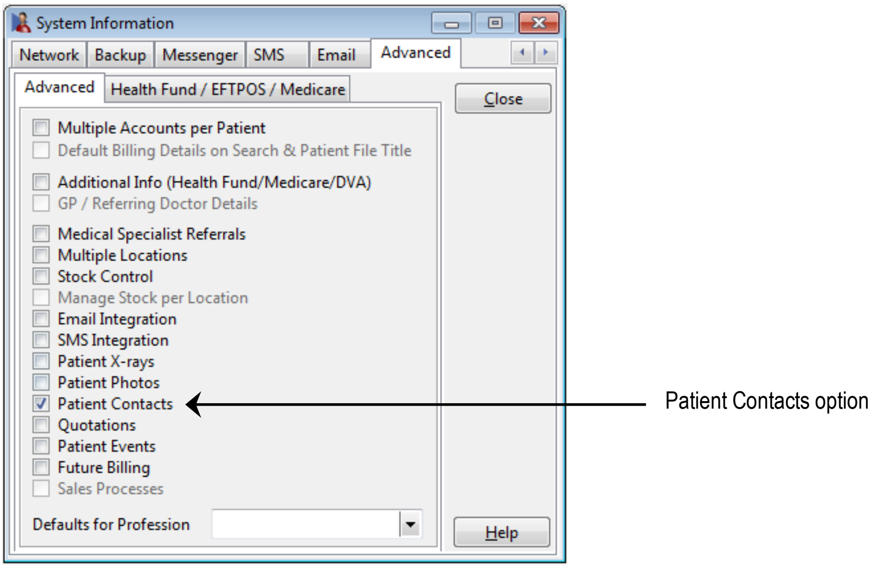
Select **Patient Tracking** to list only those patients who have a particular tracking category set in their patient file.

- **Include if any** will generate a report of those patients who have any of the selected tracking categories set in their file.
- **Include if all** will generate a report of those patients who have all of the selected tracking categories set in their file.
- **Exclude** will generate a report excluding those patients who have the selected tracking categories set in their file.

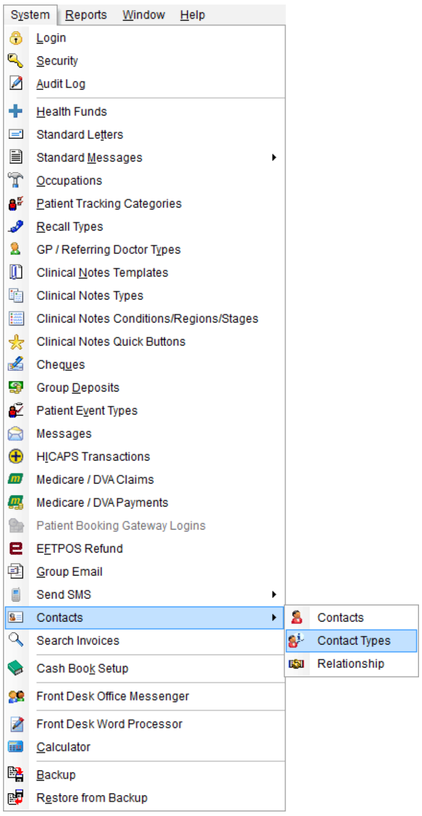
ADVANCED FEATURES

Patient Contacts

Select the **Advanced** tab in **System Information**. The **Patient Contacts** option should be enabled if you wish to store one or more contacts per patient file. Contacts such as family members, case managers or medical specialists can be entered in this section.

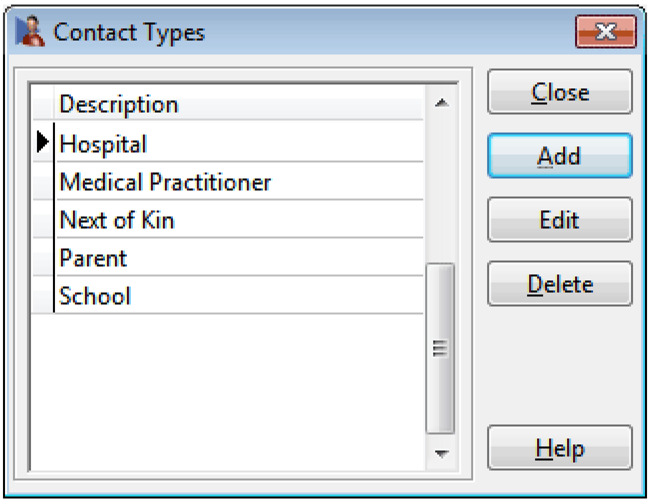


To create a contact type, select **Contacts** from the **System** menu and then **Contact Types**.

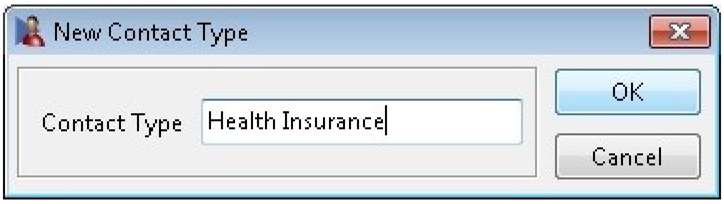


Patient Contacts

At least one **Contact Type** needs to be added before a contact can be created.



To create a new contact type, click **Add**.

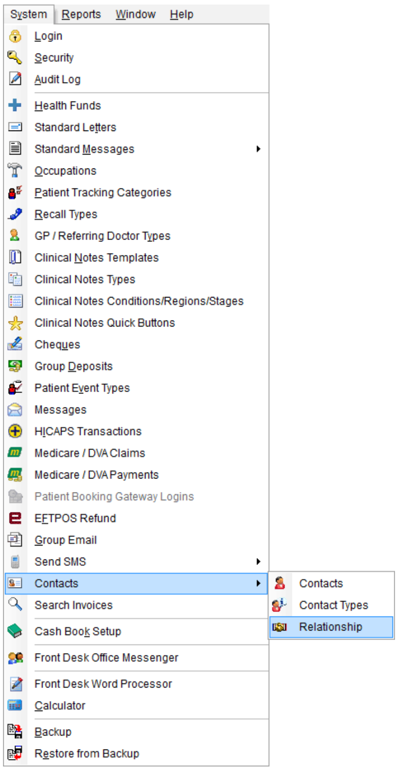


To rename a contact type, click **Edit** and to remove a contact type click **Delete**.

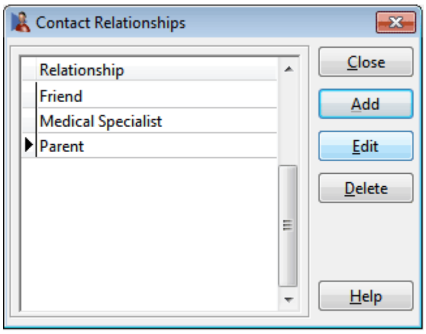
Contact Relationships

A relationship is the connection between a patient and a contact. For example: referring doctor, case manager, account payee, parent, employer, etc.

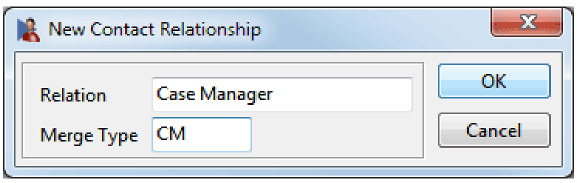
To create a relationship, select **Contacts** from the **System** menu then select the **Relationship** option.



To create a relationship, click **Add**.



Enter the **Relation** and the **Merge Type** for each relationship. The **Merge Type** is a 1-3 letter code used for creating standard letters and mail merges.

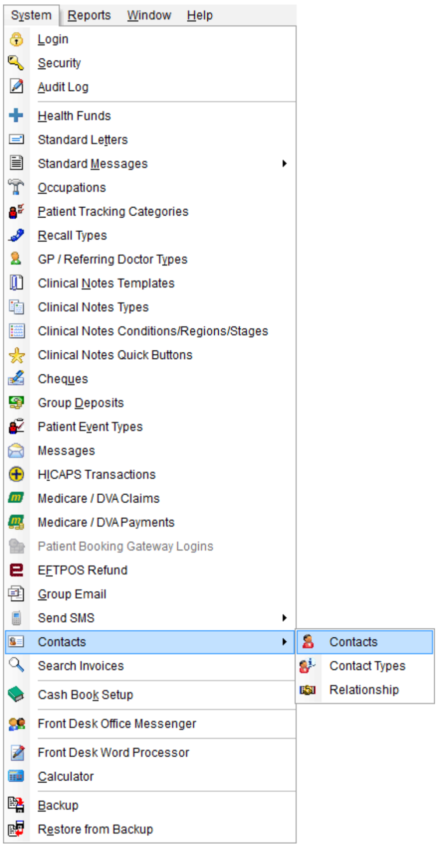


To rename a relationship, click **Edit**, to remove a relationship click **Delete**.

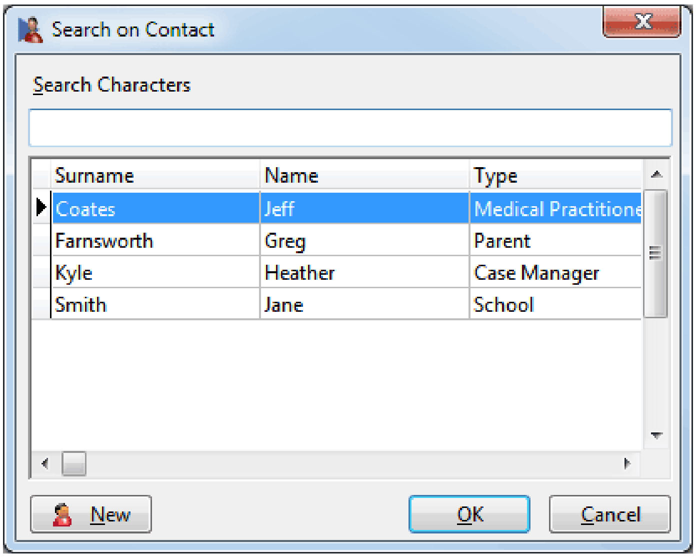
Patient Contacts

Once you have created at least one contact type and one relationship, you can now start adding contacts.

Select **Contacts** from the **System** menu then select the **Contacts** option.

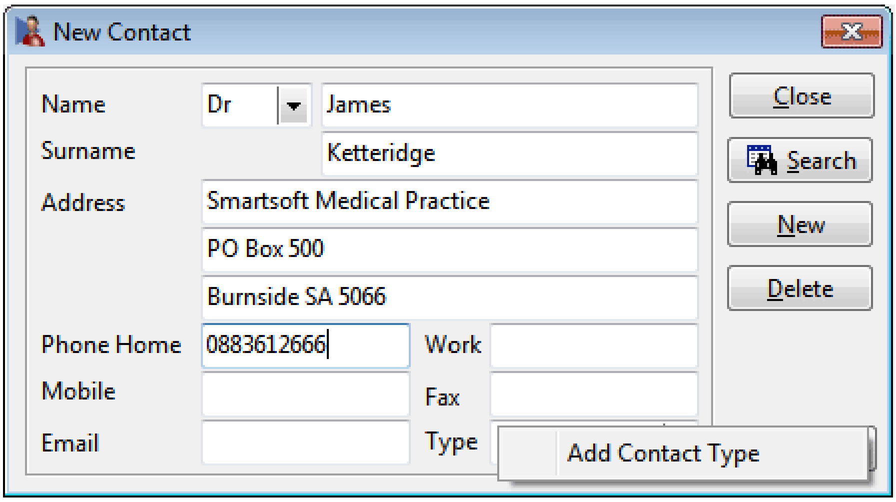


To add a new contact, click **New**.



Patient Contacts

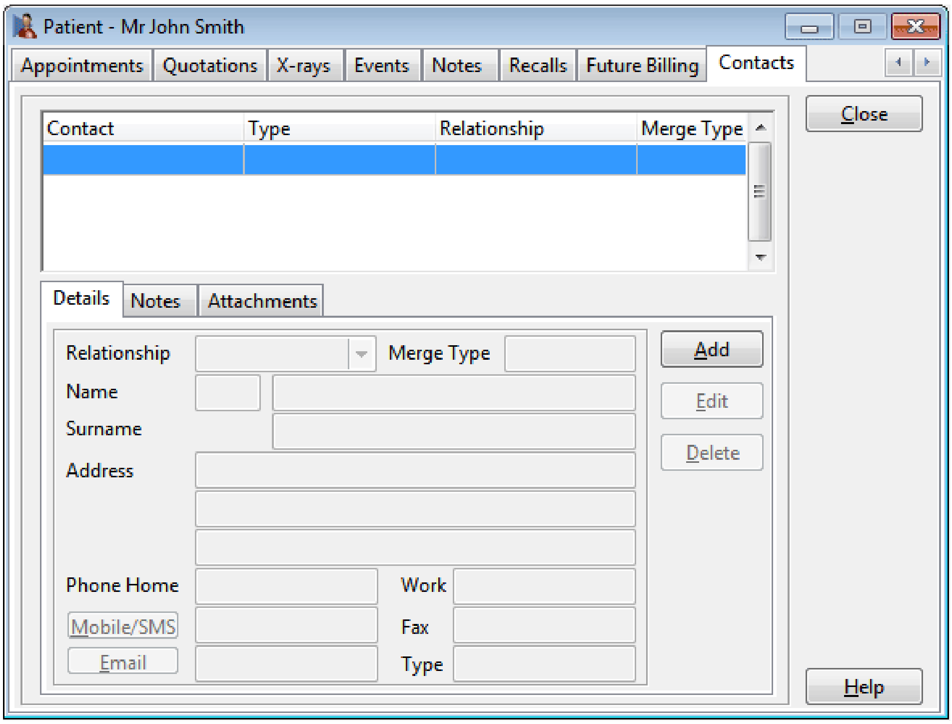
Enter the details of the contact and select the type of contact they are from the drop-down box labelled **Type**. To create a new contact type right click on the type field and select **Add Contact Type**.



To view another contact click **Search**, to add another contact click **New**, and to remove a contact click **Delete**.

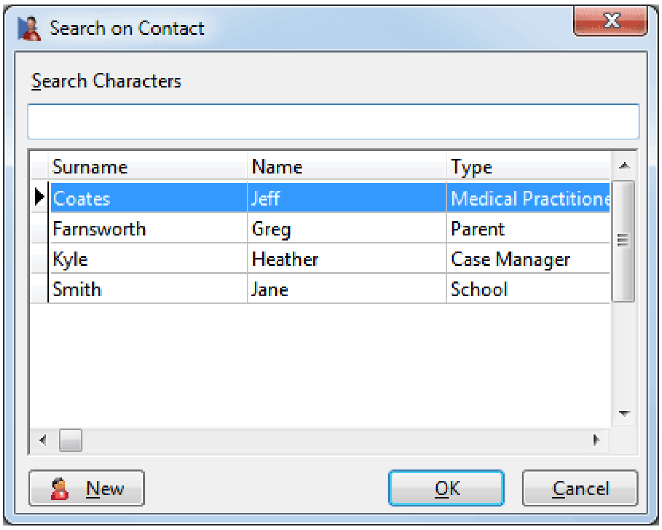
Click **Close** to exit the **Contact** screen.

To set a contact for a patient, select the **Contacts** tab on the patient's file.



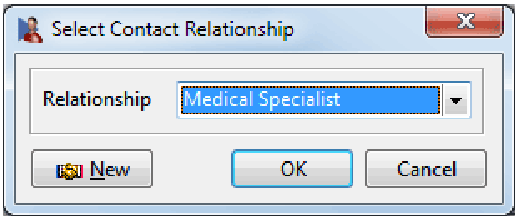
Patient Contacts

Click **Add**. The following **Search on Contact** window will appear.



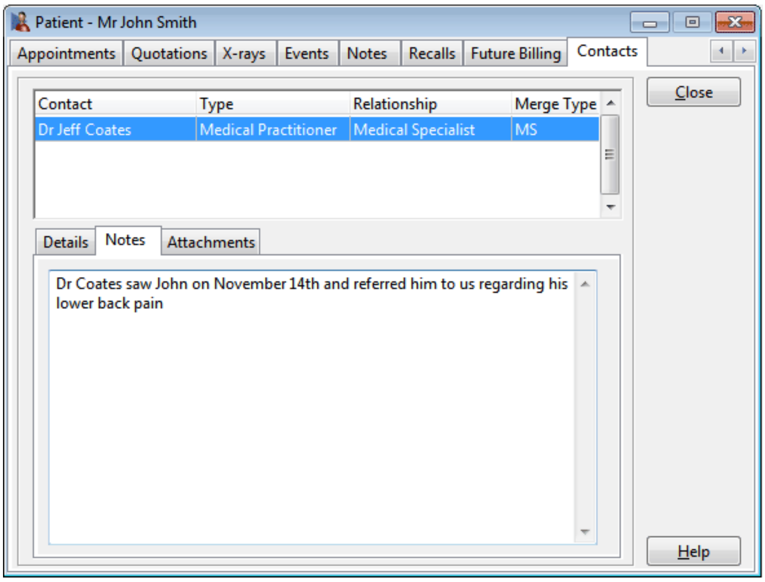
To select a contact, highlight their name and click **OK** (or double click).

You will be prompted to select the relationship between the patient and contact.



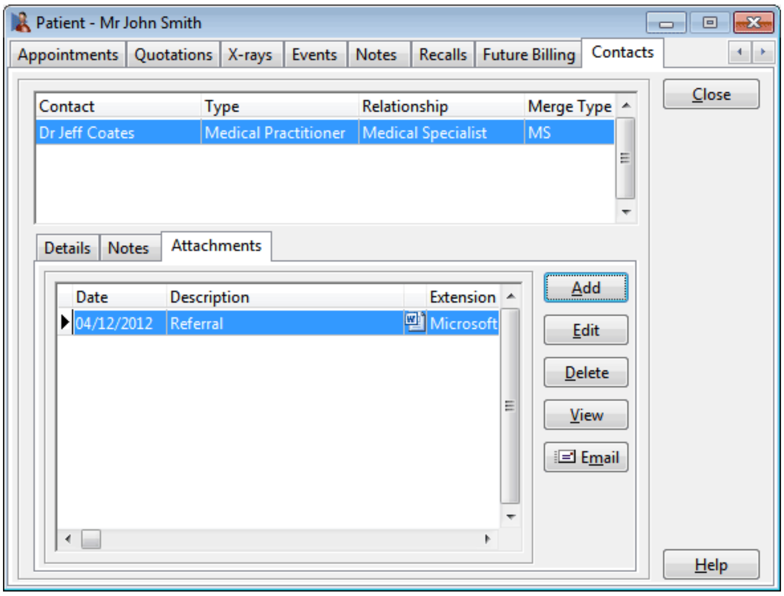
Use the drop-down box to select the relationship or click **New** to add one.

To add notes regarding the contact, select the **Notes** tab.

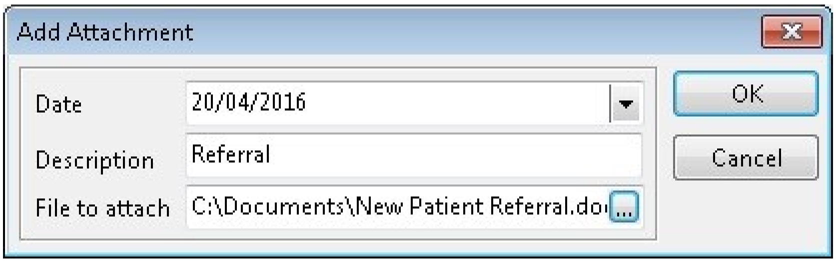


Patient Contacts

To add attachments to the contact, select the **Attachments** tab.



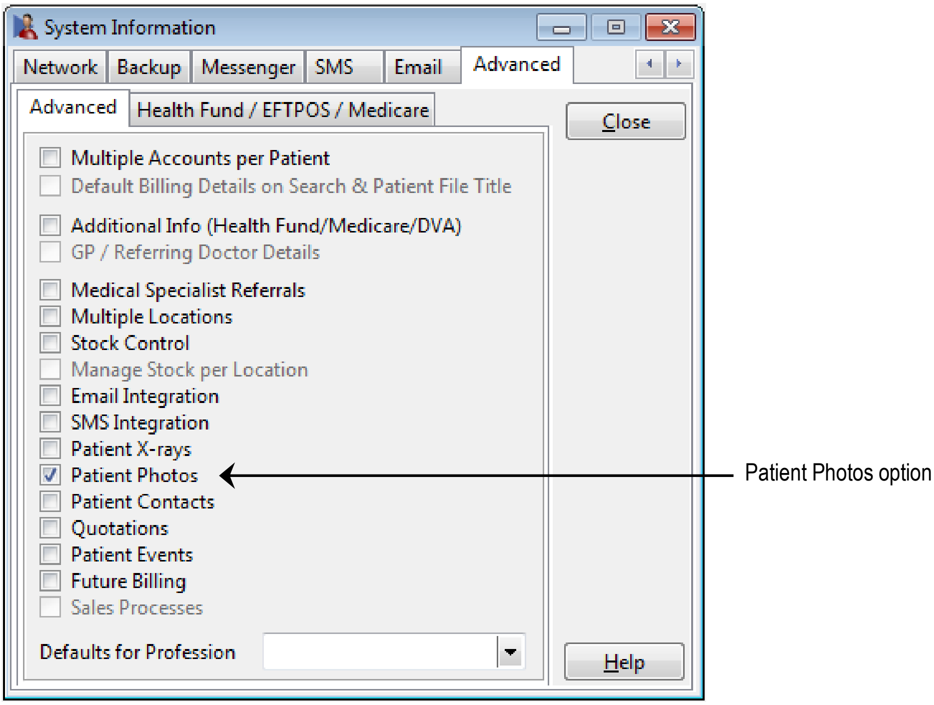
Click **Add** to insert a file. On the **Add Attachment** dialog, enter a description and then click the browse button  to search for the **File to attach**.



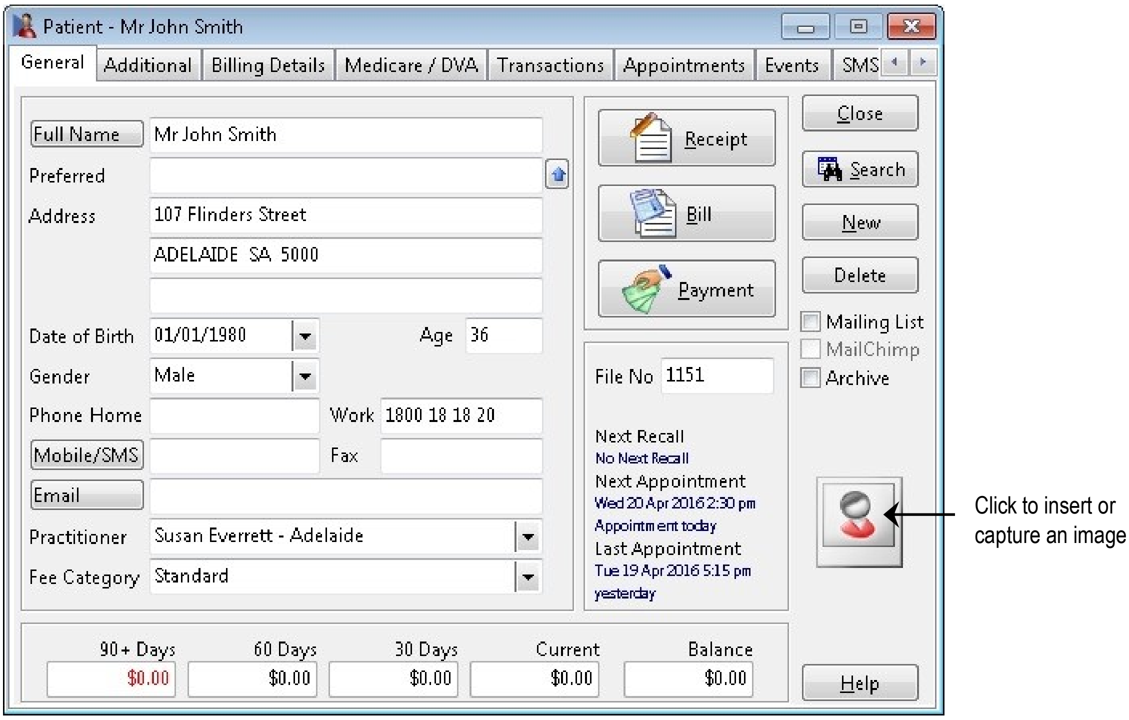
ADVANCED FEATURES

Patient Photos

Select the **Advanced** tab in **System Information**. The **Patient Photos** option should be enabled if you wish to insert or capture and display a photo of the patient on the **General** tab of the patient file.

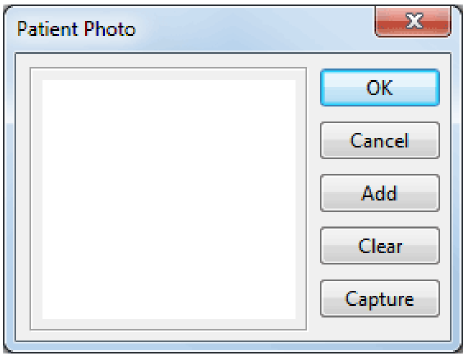


A new patient portrait icon will appear on the **General** tab, click this icon to attach or capture an image.

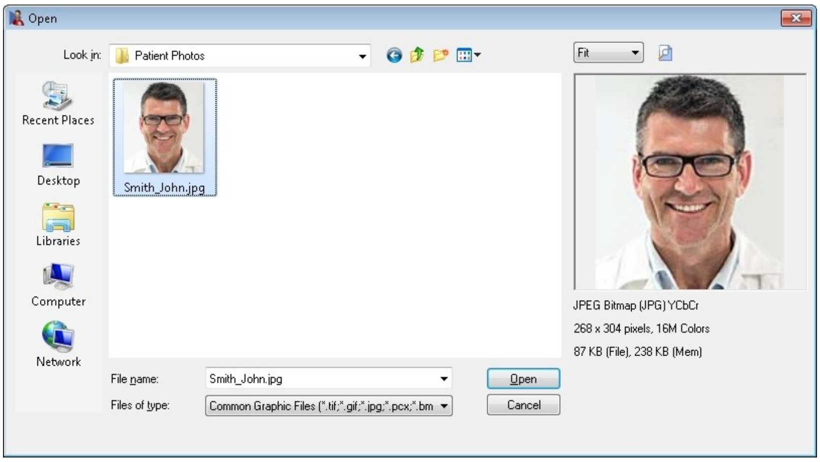


Patient Photos

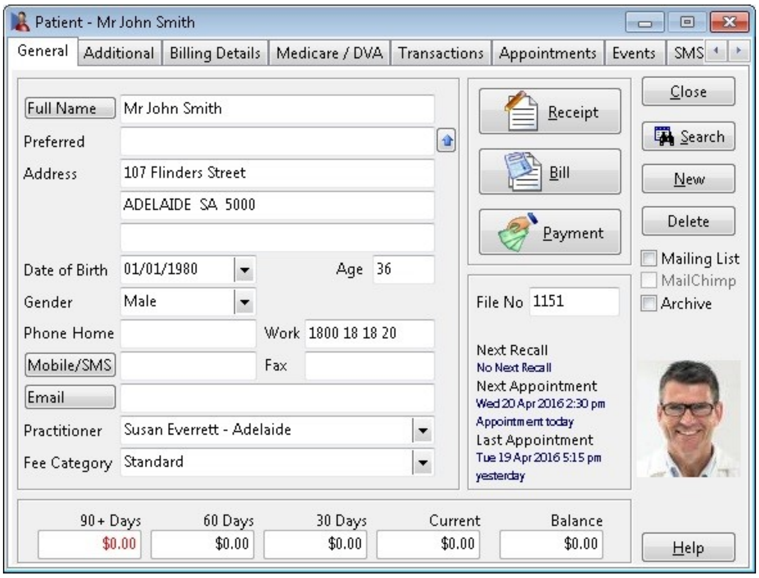
Click **Add** on the **Patient Photo** dialog.



Search for the photo file from the **Open** file dialog and click **Open**.



Click **OK** on the **Patient Photo** screen to insert the photo.



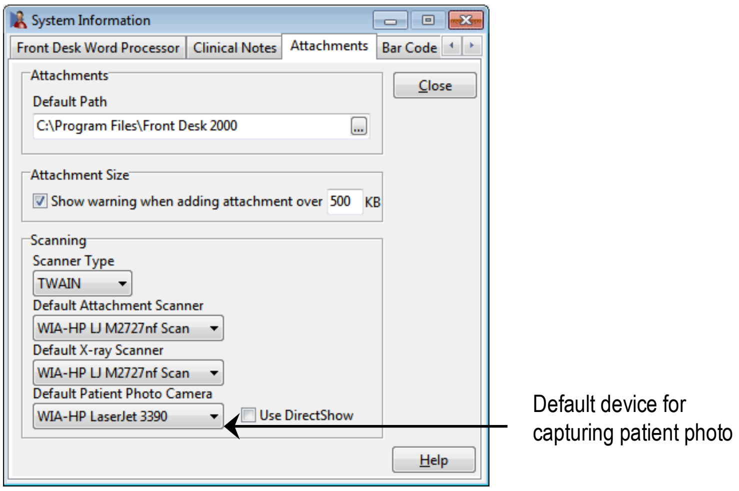
Alternatively, click **Capture** to take a photo with a web cam or digital camera.

Patient Photos

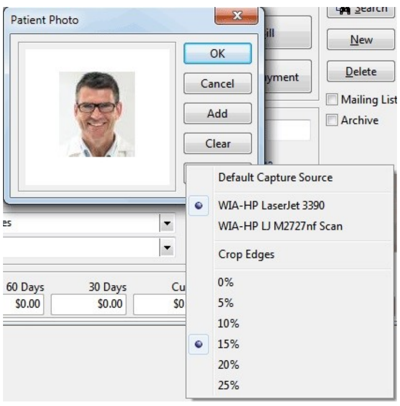
To edit or delete the patient's photo, click on the photo and the **Patient Photo** screen will appear.

Click on the photo or click **Add** to change the photo, **Capture** to capture another photo or **Clear** to remove the photo.

The default source for capturing patient photos can be set on the **Attachments** tab in **System Information**. Some cameras will need the **Use DirectShow** option selected.

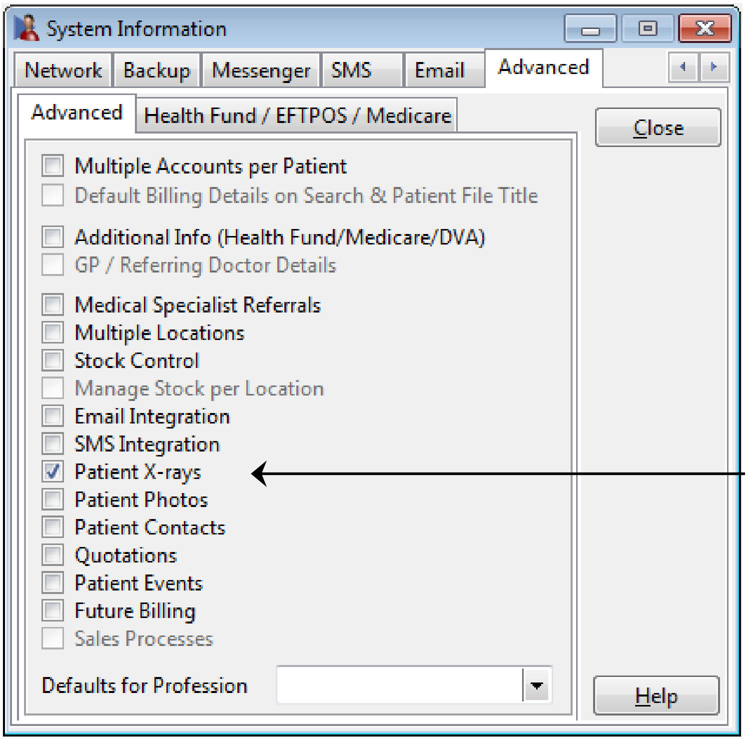


Right-clicking on the **Capture** button allows the user to change the **Default Capture Source** or to alter the **Crop Edges** setting, which by default will crop 15% off the edges of photos.



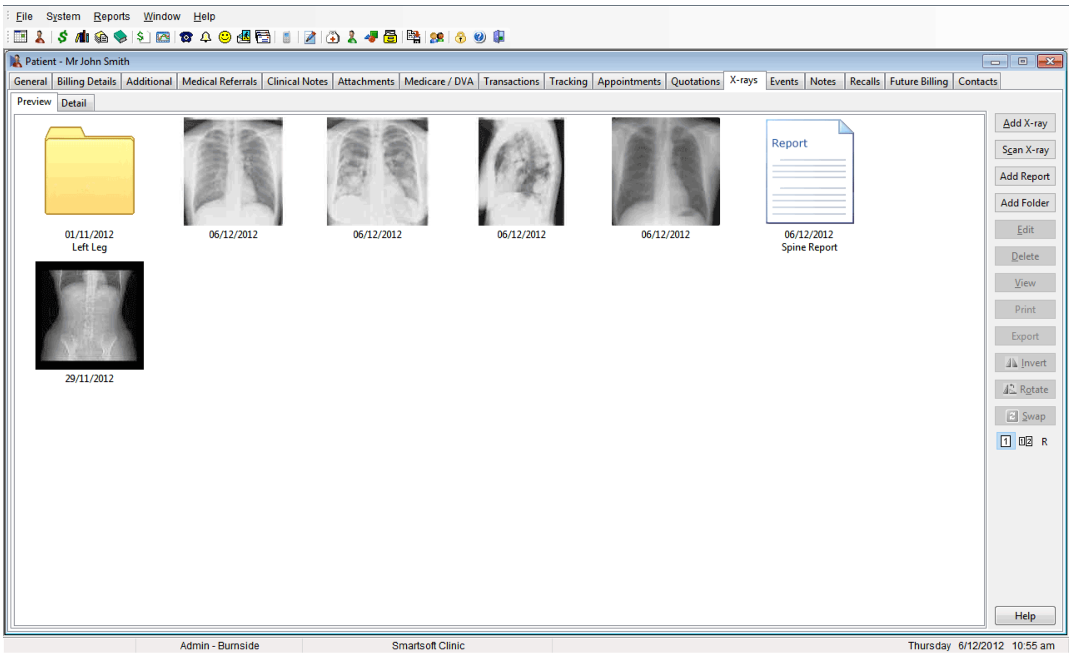
Patient X-rays

Select the **Advanced** tab in **System Information**. Enable **Patient X-rays** if you wish to import digital X-rays into patient files.



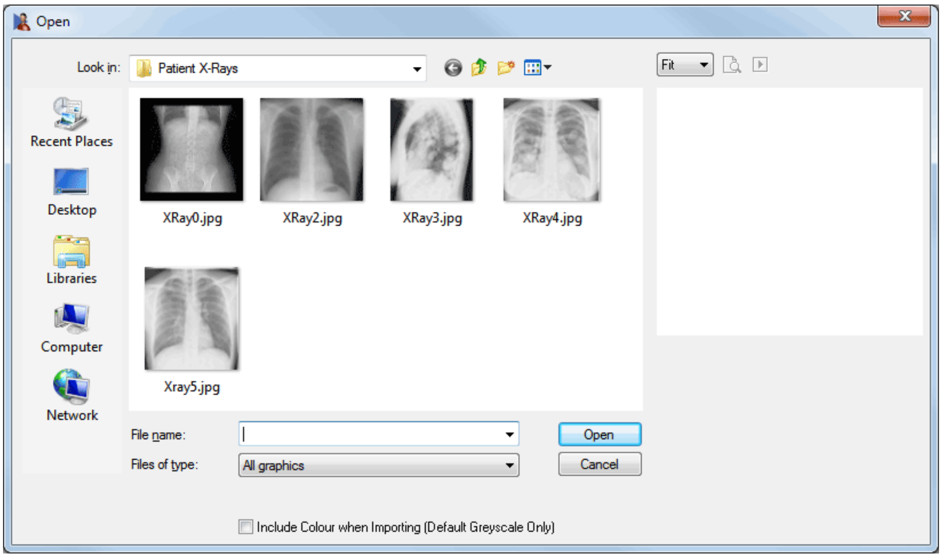
Patient X-rays

The **X-rays** tab will now be available in the patient file.

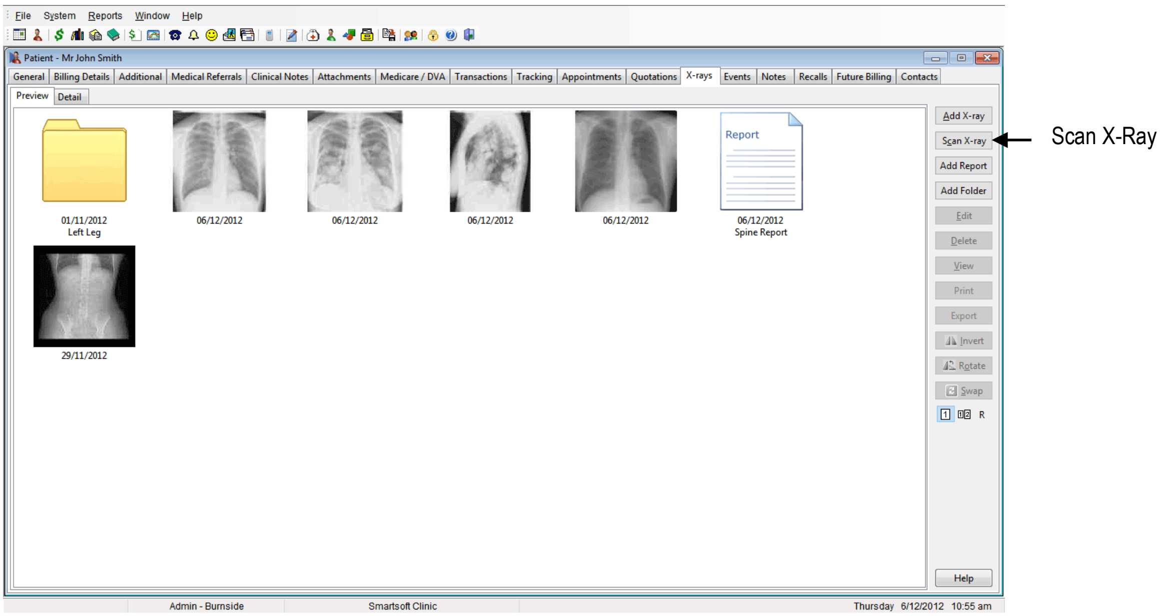


Patient X-rays

To insert an X-ray image click **Add X-ray**. Locate and select the image you wish to insert and click **Open**. To select multiple X-rays hold down the **<SHIFT>** key on the keyboard whilst making your selection. You can import images in colour by selecting the **Include Colour when Importing (Default Greyscale Only)** option.



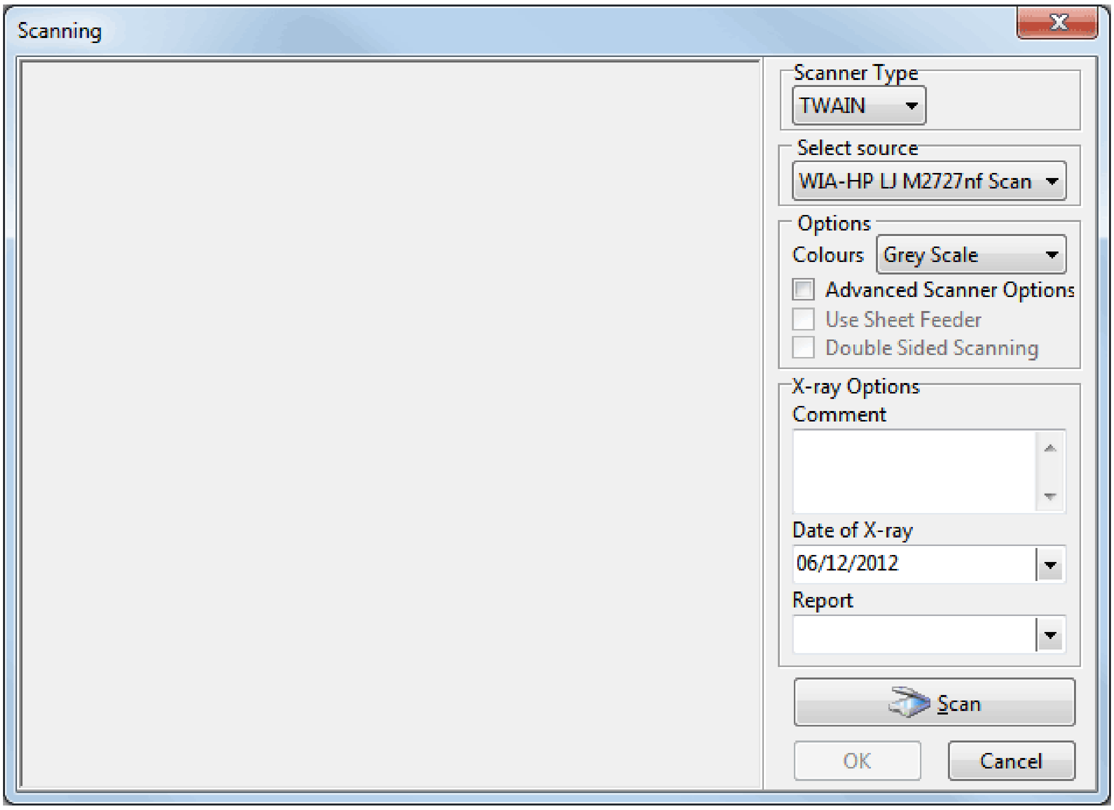
X-rays can be scanned directly into the **X-rays** section of a patient file. This functionality is reliant on an X-ray digitiser or scanner being installed and working on your computer prior to scanning X-rays in *Front Desk 2017*. Click **Scan X-ray** to open the scanning dialog.



Patient X-rays

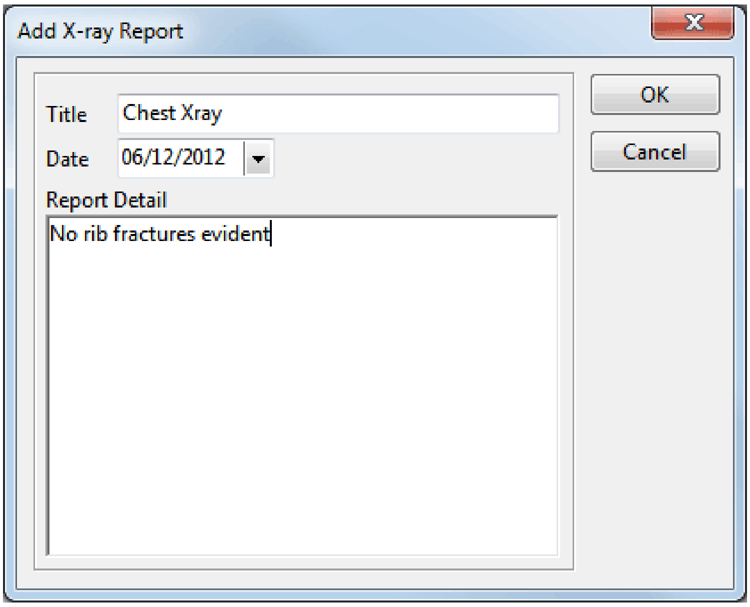
Select the scanner from the **Select source** drop-down box. The **Colours** option will generally be set to **Grey Scale** but can be changed if required. Checking the **Advanced Scanner Options** will allow you to directly use the X-ray scanner software settings. A **Comment** regarding the X-ray can be entered and an X-ray **Report** can be attached as required.

Click **Scan** to begin the scanning process.

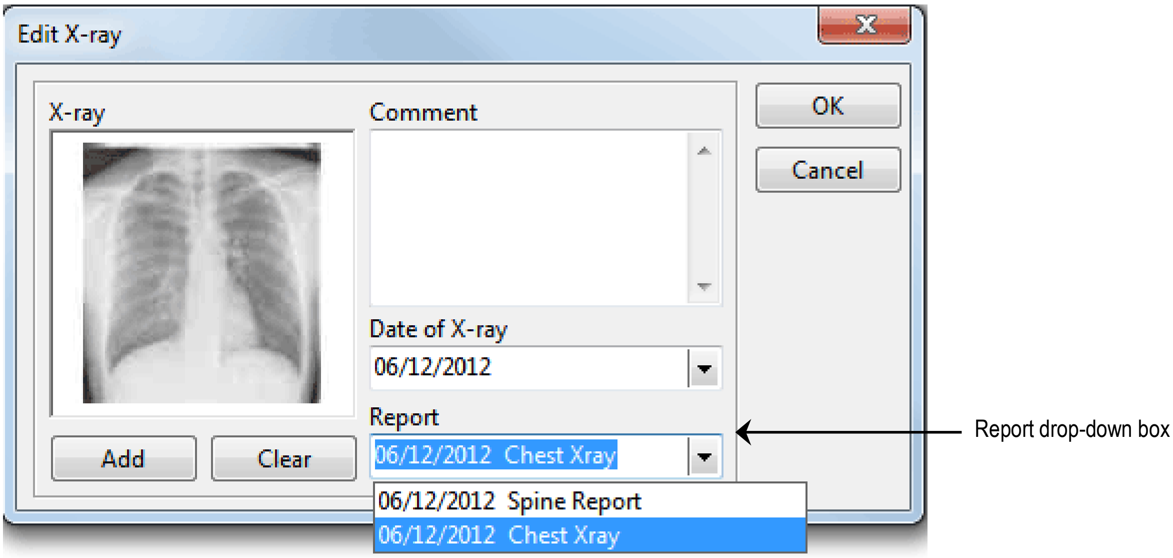


Patient X-rays

To create an X-ray report, click **Add Report**. Enter a title, the date and the report details, click **OK** to save.



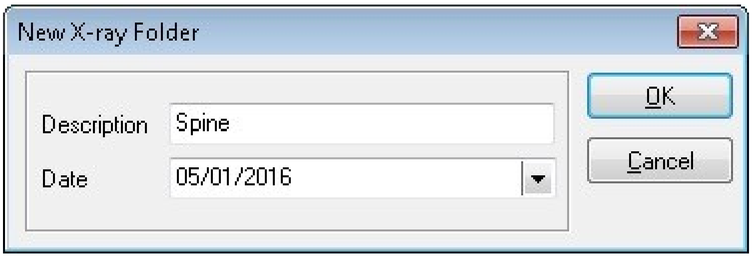
To associate a report with a particular X-ray, select the X-ray then click **Edit**. From the drop-down box select the report you wish to link to the X-ray and click **OK**.



Patient X-rays

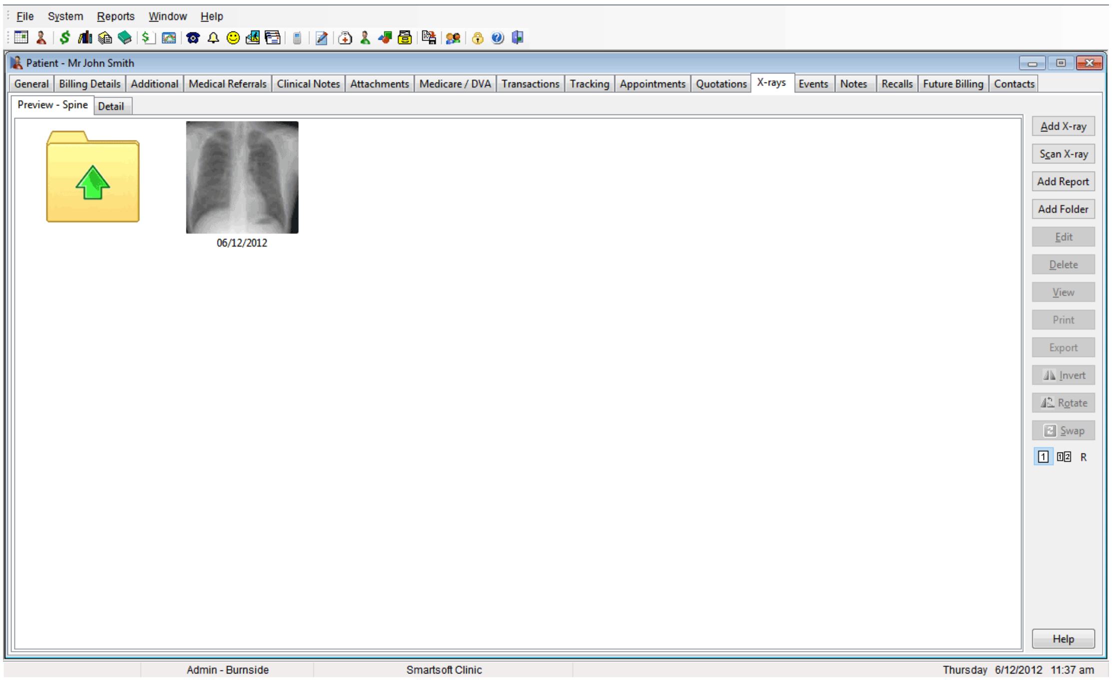
X-ray folders are used to logically organise a series of X-rays and reports into folders.

To create an X-ray folder, click **Add Folder**. Enter a **Description** and a **Date** and click **OK** to save.



To add X-rays or reports either drag and drop onto the folder or double click on the folder and add accordingly.

To close the folder, double click on the folder containing the green up-arrow to the left.

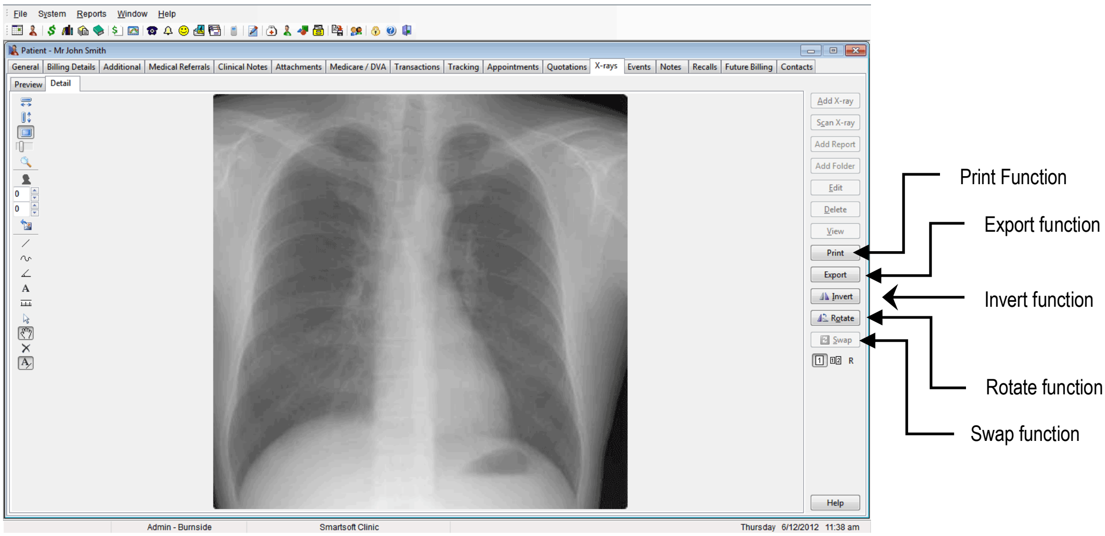


Multiple X-rays can be exported from the **Preview** tab by highlighting the desired X-rays and selecting **Export**.

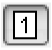
Advanced Features

Patient X-rays

Select the **Detail** tab for more X-ray functions.



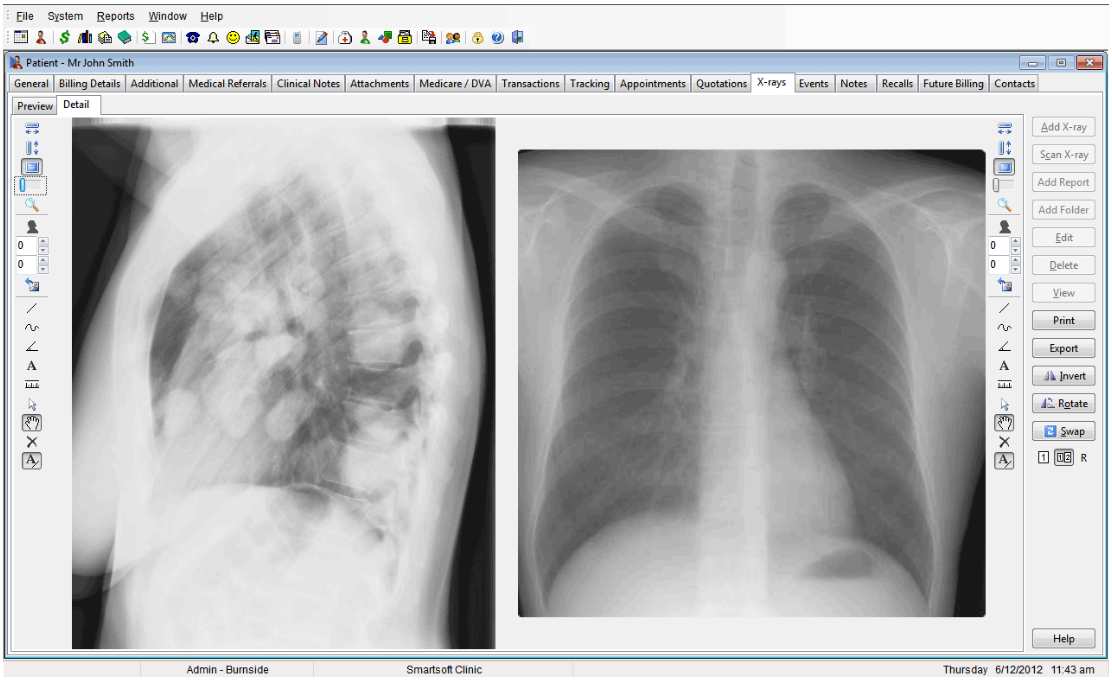
The **Print** button will print the selected X-ray.
The **Export** button allows you to save the X-ray in another location.
The **Invert** button reverses the X-ray.
The **Rotate** button rotates the X-ray 90° clockwise.
The **Swap** button switches the position of the X-rays from left to right. This option is only enabled when two X-rays are displayed.

The  button displays just one X-ray on the screen. The  button displays two X-rays on the screen. The  button displays the X-ray report attached to that X-ray.
The icons on the left of screen allow you to insert lines, text and magnify parts of the X-ray.

← *Fit to Width* – maximises the width of the X-ray to fit the screen
← *Fit to Height* – maximises the height X-ray to fit the screen
← *Full Screen* – maximises the X-ray to fit entirely on the screen
← *Zoom* – allows the view to be increased or decreased by percentage of magnification
← *Magnify* – allows you to enlarge certain areas of the X-ray
← *Negative* – replaces the white areas with black and black areas with white
← *Contrast* – Adjusts the contrast level
← *Brightness* – Adjusts the brightness level
← *Restore Contrast / Brightness* – returns the X-ray to the original contrast / brightness
← *Draw Line* – Allows you to draw straight lines on the X-ray
← *Draw Freehand* – Allows you to draw anything on the X-ray
← *Draw Angle* – Allows you to draw any angle on the X-ray
← *Draw Text* – Allows you to add text to the X-ray
← *Draw Ruler* – Allows you to draw a line and measure the length of objects
← *Select* – Allows you to highlight an object, text or line that you have drawn or inserted
← *Scroll Image* – Allows you to move the image around the screen, if it is maximised
← *Delete Image* – Allows you to delete lines or text that you have added to the X-ray
← *Show Annotations* – displays the icons from Draw Line and below

Patient X-rays

To view two X-rays together hold down the **<SHIFT>** key on your keyboard and click on the two X-rays you wish to view. Alternatively, drag your mouse over both X-rays until they are both highlighted. Click on the **Detail** tab to view both X-rays.

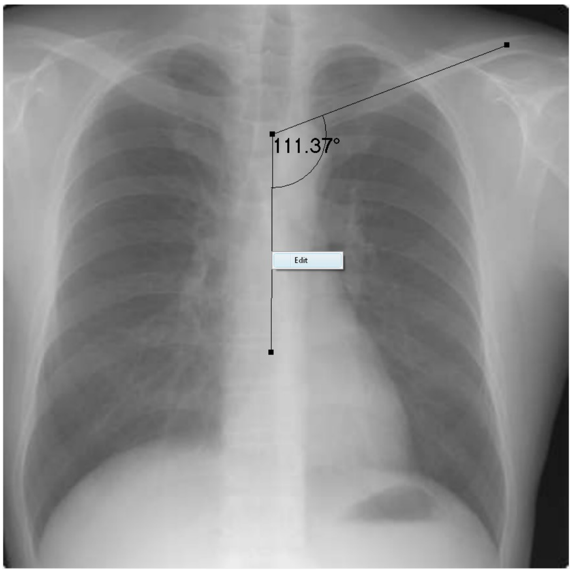


The **Swap** button will become enabled, this option allows you to switch the order in which the X-rays appear.

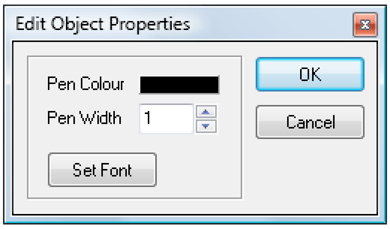
Patient X-rays

Angles

You can draw angles on X-rays using the on the left. An example is shown below.



Right clicking on the line will display the **Edit** button. Clicking the **Edit** button opens the **Edit Object Properties** dialog.



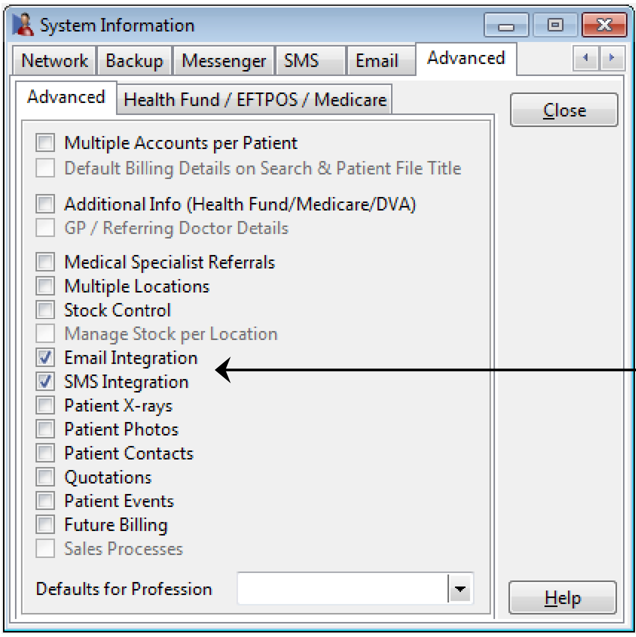
The width and colour of the line can be altered using the **Pen Colour** and **Pen Width** options. Additionally, clicking the **Set Font** button allows the font, style and size of the angle text to be altered.

Front Desk 2017 - Tip

The X-ray functionality in *Front Desk 2017* can also be used by practices wishing to store clinical photos or images. The **X-ray** tab can be renamed accordingly (e.g. to 'Photos' or 'Images'). This option is available on the **Options** tab in **System Information**.

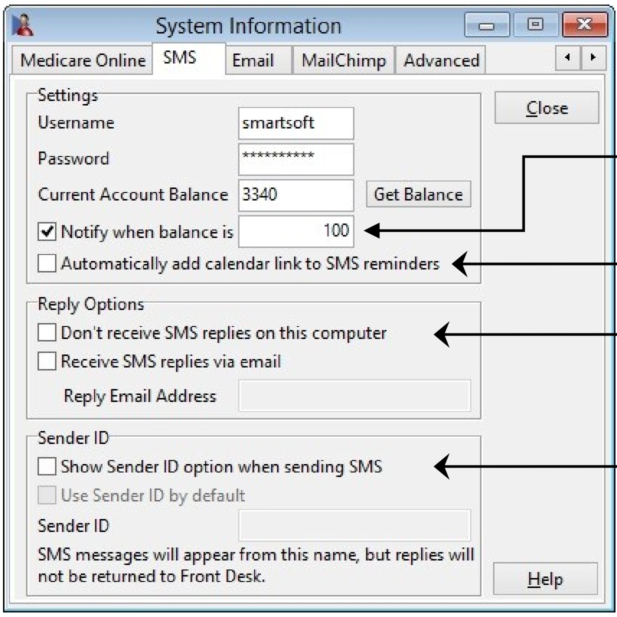
SMS and Email Integration

Select the **Advanced** tab in **System Information**. The **SMS** and **Email Integration** options should be checked if you wish to send SMSs and/or emails directly to a patient’s mobile phone and/or email address.



SMS and **Email Integration** options

An **SMS** tab and an **Email** tab will now appear in **System Information**.



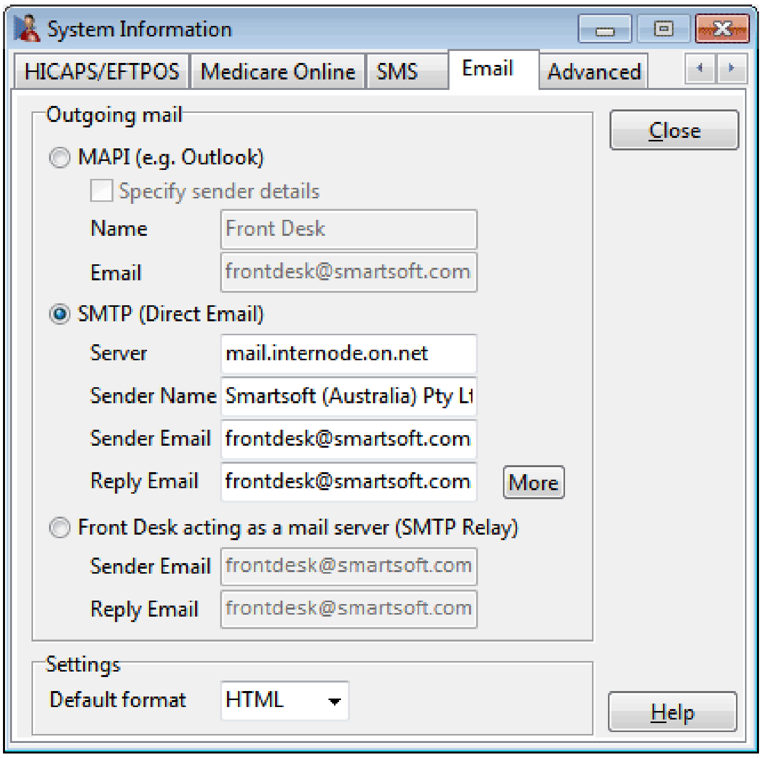
Select this option to receive a warning notification when the SMS balance reaches below the specified amount.

Used to automatically add a calendar link to SMS reminders.

Select this option to stop receiving replies on this computer. This should be used for home / backup copies of Front Desk.

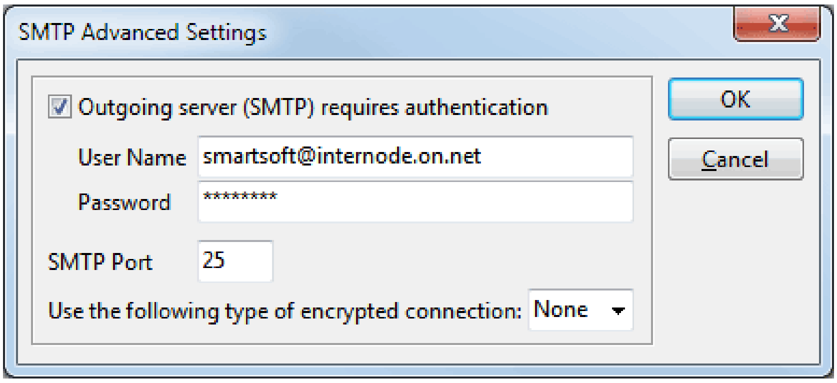
The Sender ID determines the name or number (ID) that appears on the recipient’s phone when a message is received. If a mobile number is entered, including dialling code, all replies will go to that mobile and will not return to Front Desk. If a name is entered (eg. ‘Smartsoft’) the patient will not be able to reply.

SMS and Email Integration



When using Microsoft Outlook as your email client select the **MAPI** option. With this option users can choose to send on behalf of an alternative name and email address.

Alternatively, select **SMTP (direct Email)** and enter your email details as required. If you are unsure of your email settings please contact your system administrator or ISP (Internet Service Provider) for these details. To set up **SMTP Authentication** click the **More** button and select **Outgoing server (SMTP) requires authentication** and enter your **User Name** and **Password** for your ISP.



SMTP port and encryption can be used for the sending of emails through other email services (e.g. Gmail, etc).

SMS and Email Integration

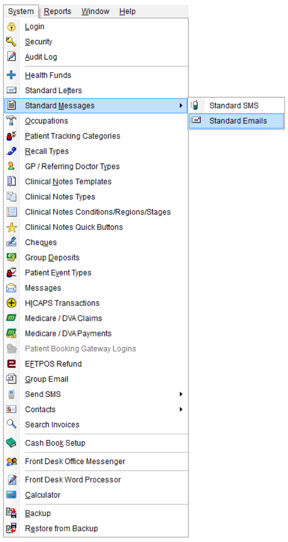
The **Front Desk acting as a mail server (SMTP Relay)** option allows you to send emails directly from Front Desk® without using an email server. For this functionality to operate correctly your ISP must allow you to send traffic on port 25 (SMTP protocol).

To send SMS messages from *Front Desk 2017*, you need to purchase SMS credits from the Smartsoft website. Select **Purchase SMS Credits Online** from the **Help** menu to enter the Smartsoft secure purchase area. The SMS messaging system in *Front Desk 2017* is an Internet based system, so it requires you to be connected to the Internet when sending SMS messages (similar to sending email messages).

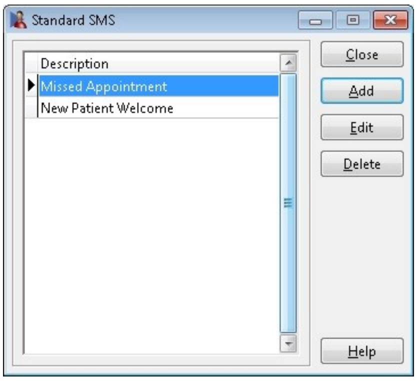
Smartsoft will provide your practice with a SMS **Username** and **Password**. To find out how many SMS credits you have available click the **Get Balance** button.

Setting up Standard Messages

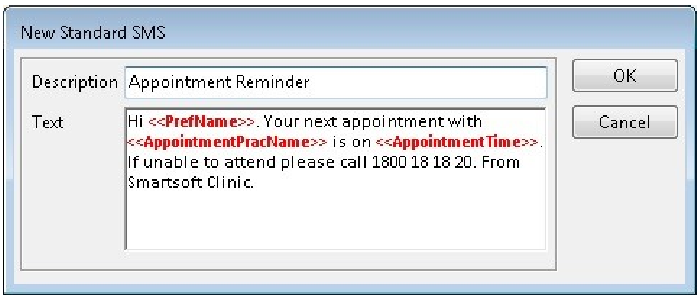
Standard SMS and Email messages allow you to send standard customised messages to clients. To set up a standard message, select **Standard Messages** from the **System** menu then select either **Standard SMS** or **Standard Emails**.



To create a new message template, click **Add**.



Enter the name of the message in the **Description** field and the contents of the message in the **Text** field. Enter the appropriate **Standard Letters** tags for the message.



Click **OK** to save the template. Note that these tags are the same as the letter tags used in **Standard Letters**.

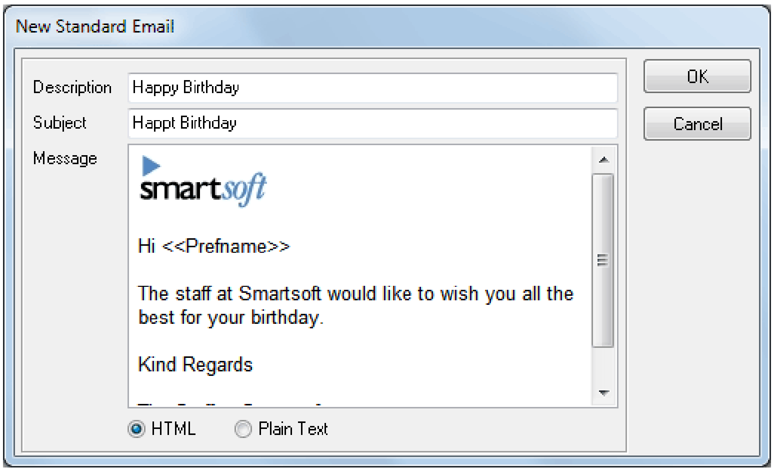
Setting up HTML Email

Front Desk 2017 supports enhanced (**HTML**) emails instead of **Plain Text** emails, which use standard fonts and contain no images. This feature is useful for patient marketing campaigns, newsletters and practice updates. To create targeted emails, **Standard Letter Tags** can be introduced to personalise each email sent.

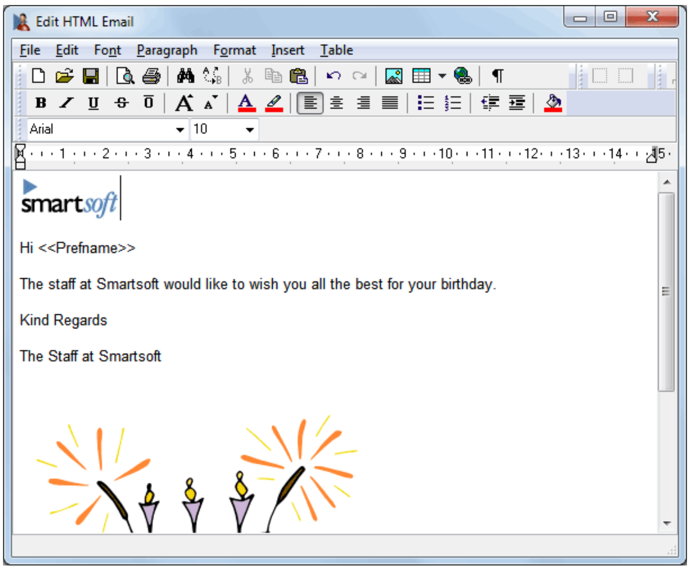
Repeat the **Setting up Standard Messages** process as described above, and select the **Standard Emails** option. The **New Standard Email** dialog will be displayed.

To send HTML emails select the **HTML** option at the bottom of the dialog and then double click in the **Message** area to bring up the HTML editor.

Set your preferred **Default Mail Format** to Plain Text or HTML on the **Email** tab in **System Information**.



You can create HTML emails directly in the HTML Editor or by copying and pasting a document from another editing program such as MS Word.



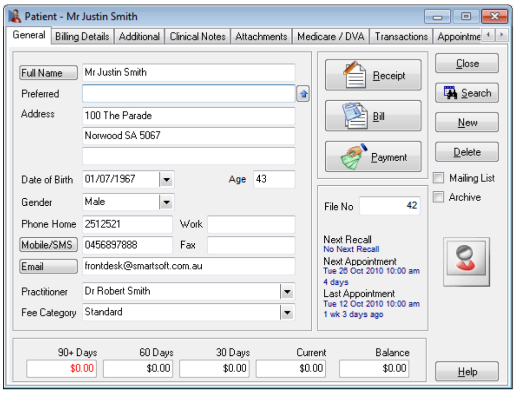
Use the menus and icons to create the HTML email

To complete your **HTML** email template, close the HTML editor and click **OK**.

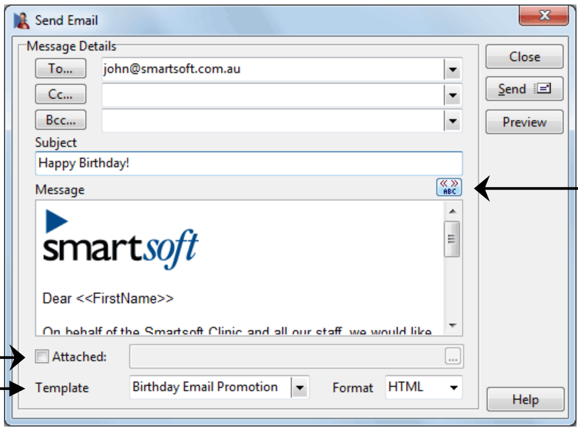
Sending SMS and Email

To send an individual **SMS** or **Email** to a patient from their patient file, simply click the **Mobile/SMS** button to send a text message or click the **Email** button to send an email.

Send SMS Message



You may wish to type a custom message, or you can select a pre-created message from the **Message Template** list. The **CC** field allows you to carbon copy the email to other addresses. The **BCC** field allows you to blind carbon copy an email, so recipients cannot see the other email addresses.



View Merged Data button

Attachment option

Select a Message Template

To **Add** file attachments, check the **Attachment** option and click the **browse** button. Navigate to the folder containing the file to attach and select the file. To add multiple files hold the **<CTRL>** key while selecting the files.

To view the message as it will be sent, click the button to replace the tags with your patient's information. Click **Send** to send the message.

You can also send an SMS or Email from the Appointment Book. Simply right click on the patient's appointment and select **Send SMS** or **Send Email** from the menu then follow the same process as above.

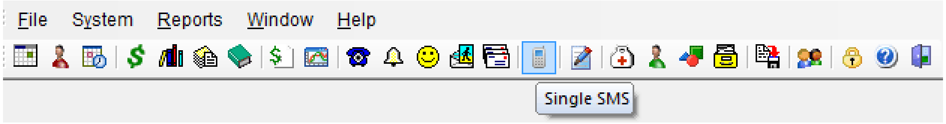
To send HTML emails, select **HTML** from the **Message Format** drop-down box.

To **Edit** an HTML template/message before sending your email, double click within the Message area and make changes within the HTML editor.

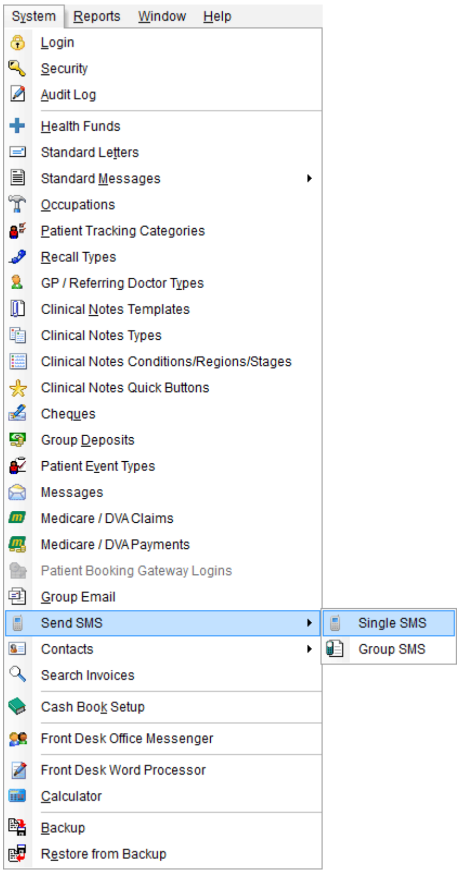
ADVANCED FEATURES

Sending SMS

To send an individual SMS through *Front Desk 2017*, select **Single SMS** on the *Front Desk 2017* **Toolbar**

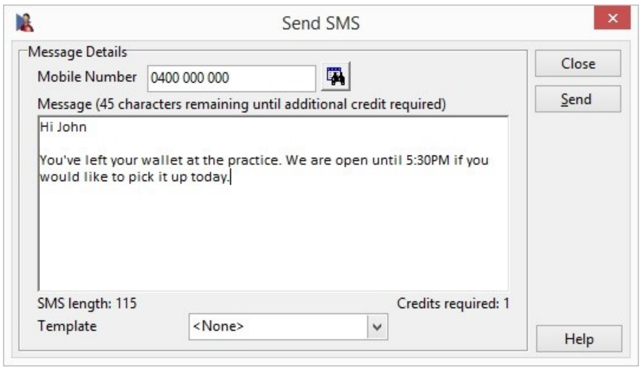


or from the **System** menu



To search for a patient click the button, or manually type the number in the **Mobile Number** field. Type the message you wish to send or select a pre-defined message from the **Message Template** list.

Click **Send** to send your SMS.

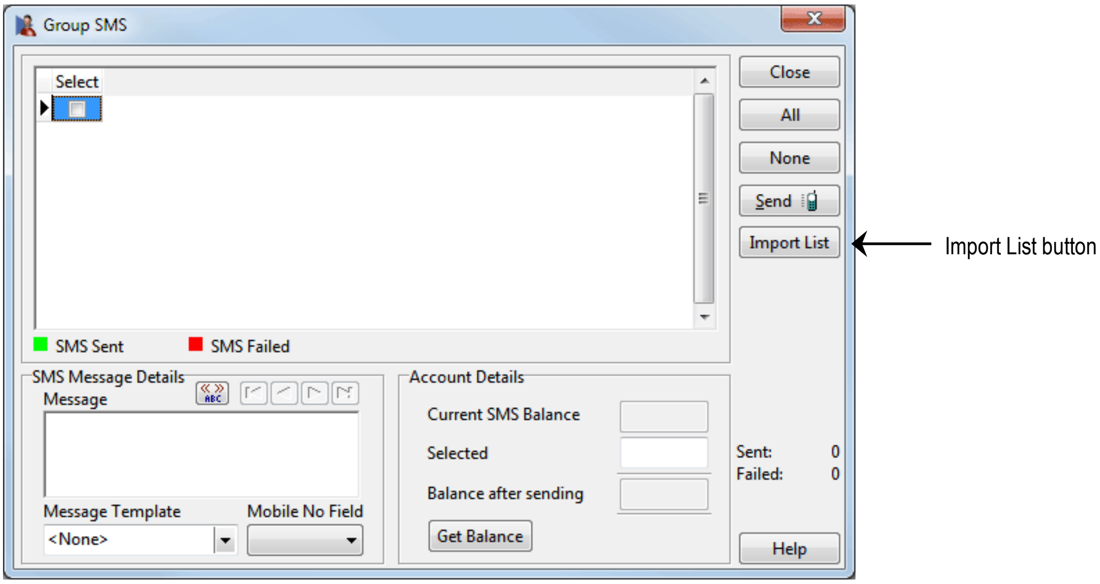


ADVANCED FEATURES

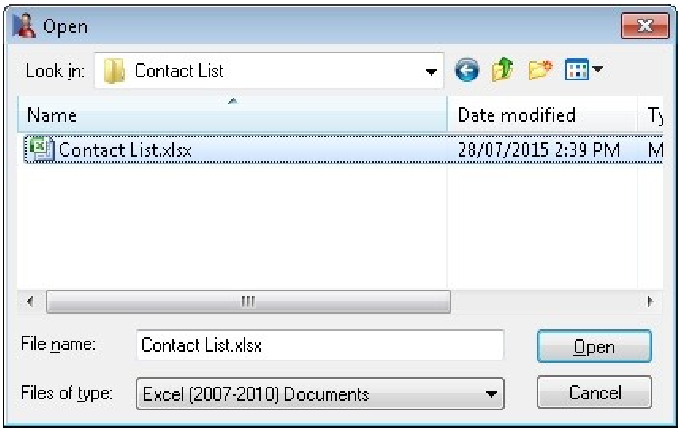
Group SMS

To send text messages to a list of contacts from an imported CSV or Excel file, select **Group SMS** located under the **Send SMS** option in the **System** menu.

On the following screen click **Import List**.

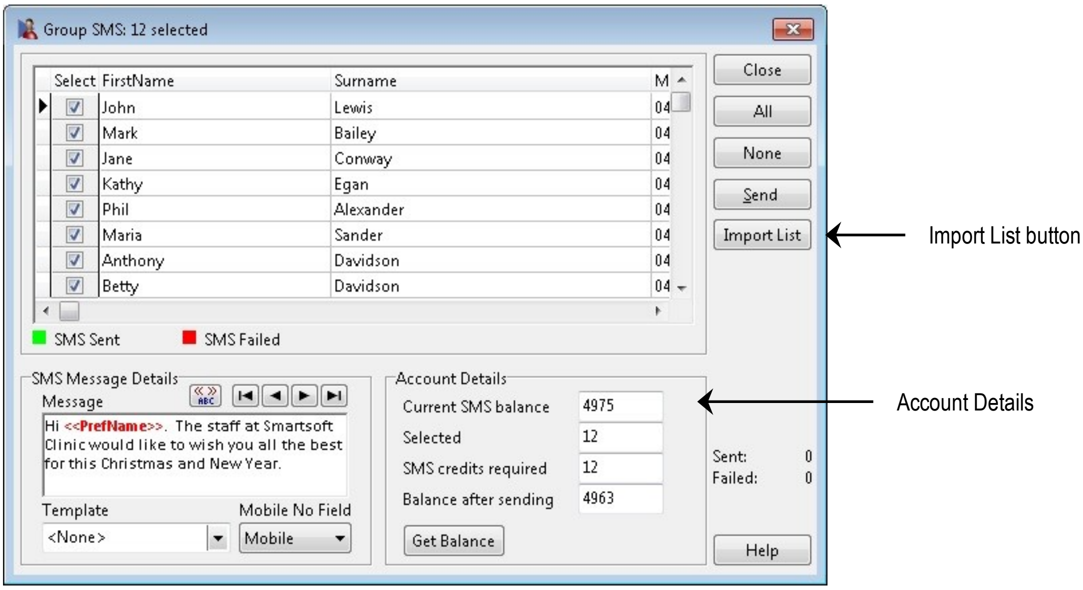


Select the file you wish to import and click **Open**.



Group SMS

Front Desk 2017 will then import the contact list into the SMS dialog.

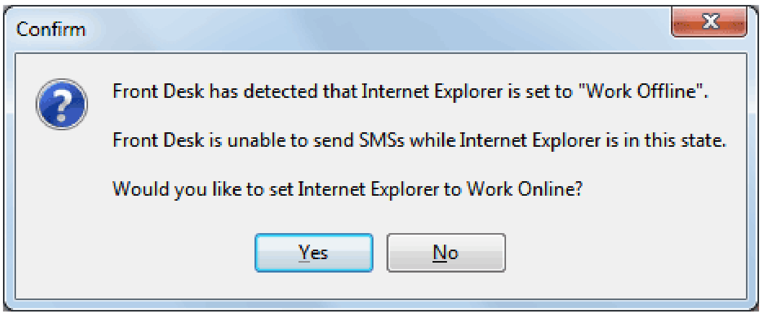


Data values in the imported list can be edited directly from the **Group SMS** window by double clicking on the cell you wish to edit, and typing in a new value. Note that this will not change the original source data.

Type the message that you wish to send or select a standard message from the **Message Template** drop-down box. To view a message as it will be sent, click the  button to replace the tags with your patient information and use the left and right arrows to scroll through your data. If you do not wish to send a message to a particular contact, uncheck the box in the **Select** column next to their name.

Click **Get Balance** to calculate the current balance before and after sending the messages. The **Selected** field will show you the number of contacts that have been selected. Click **Send** when the message is ready. *Front Desk 2017* will send each message individually, highlighting each contact as they are sent.

In order for *Front Desk 2017* to send SMS messages from your computer, Microsoft Internet Explorer must be **Working Online**. If *Front Desk 2017* detects that Internet Explorer is currently **Working Offline** when attempting to send an SMS, the following message will be displayed.

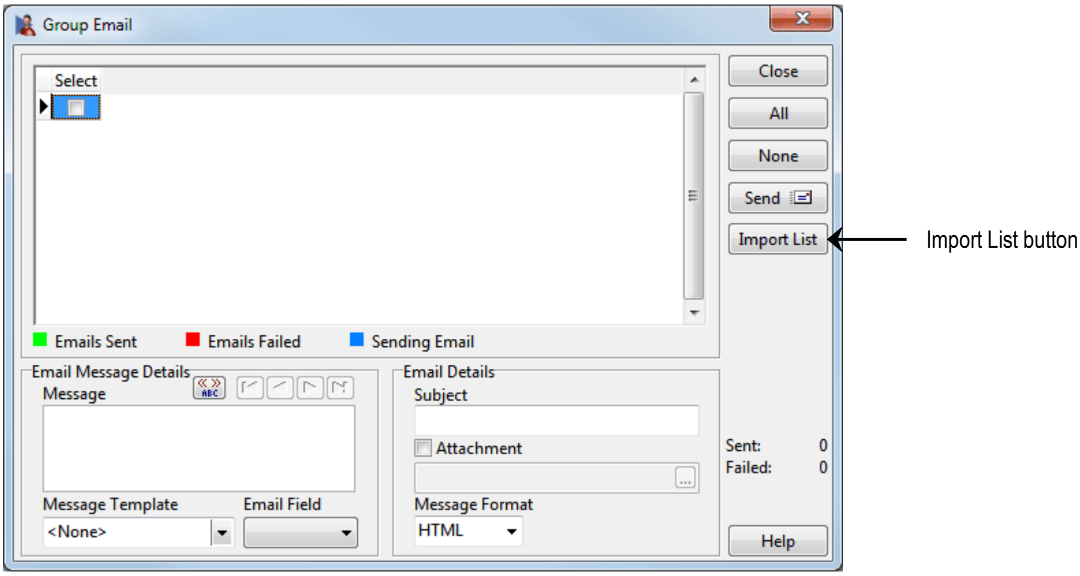


Click **Yes** to set Internet Explorer to **Work Online**, and continue sending SMS.

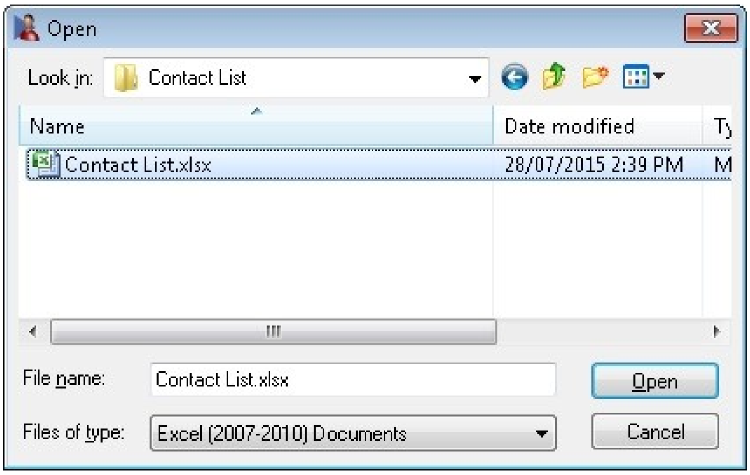
Group Email

To send email messages to contacts from an imported CSV or Excel file, select **Group Email**, located on the **System** menu.

On the following screen click **Import List**.



Select the file you wish to import and click **Open**.



Front Desk 2017 will import the information from the file into the **Group Email** recipient screen.

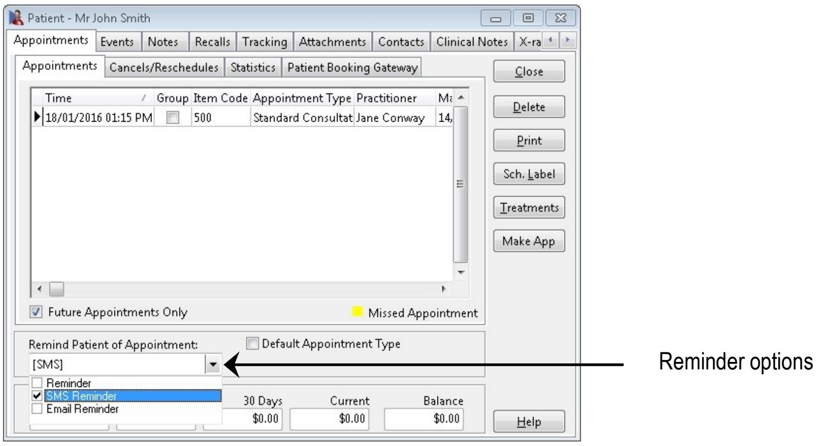
Data values in the imported list can be edited directly from the **Group Email** window by double clicking on the cell you wish to edit, and typing in a new value. Note that this will not change the original source data.

Type the message that you wish to send or select a standard message from the **Message Template** drop-down box. To view the email as it will be sent, click the button to replace the tags with your patient information and use the left and right arrows to scroll through your data. If you do not wish to send a message to a particular contact, uncheck the box in the **Select** column next to the contact.

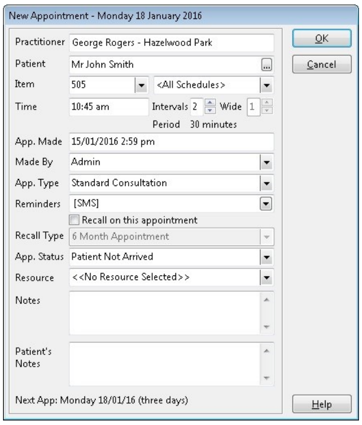
Appointment Reminders with SMS and Email

If you have enabled **SMS** and **Email Integration**, you can set default appointment reminders for a patient in the patient card.

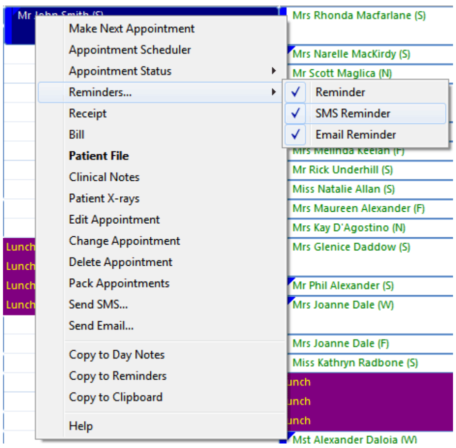
From the patient file select the **Appointments** tab. Under **Remind Patient of Appointment**, select the type of reminder(s) the patient requires.



The selected reminders will now be set when making an appointment for this patient.



If you wish to change a reminder option after the appointment has been made, right click on the patient's appointment in the Appointment Book, select **Reminder** and check or uncheck the different reminder types as required.



SMS Message Failure

To maintain the highest level of reliability when sending SMS through Front Desk, all Australian SMS are sent directly from Smartsoft to each carrier– Telstra, Optus or Vodafone. For most overseas clients Smartsoft also uses local carriers. Unfortunately, even with using the best possible routing available, a small number of SMS will not be received by your patients.

This document will help identify the different types of failure and what options you have if a failure occurs.

Why did my SMS fail?

Invalid number - Front Desk will alert you before sending an SMS if the mobile number does not have the appropriate number of digits, however Front Desk cannot determine if a mobile number with the right number of digits is a valid mobile number. For example, if the mobile number does not exist the carrier will reject the SMS.

Handset/Account issue – The patient's handset may be out of range or turned off. Most carriers will attempt to re-send the message, however if the handset remains unavailable for an extended period, the carrier will stop attempting to deliver the message. Further, the patient's mobile plan or service may include restrictions in certain circumstances. For example, some carriers will not allow clients to receive business SMS if they do not have credit.

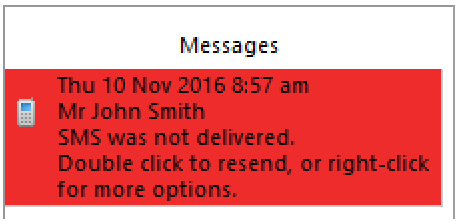
Network/Handset errors - The SMS has been sent from Smartsoft to the destination mobile network, however the SMS has failed to be received by the patient. This could be attributed to a technical error on the destination network or an error on your patient's handset.

Have I been charged for the failed SMS?

SMS that have been sent by Smartsoft into the mobile network, regardless of delivery success, will deduct from your SMS credit balance as a carrier charge will apply.

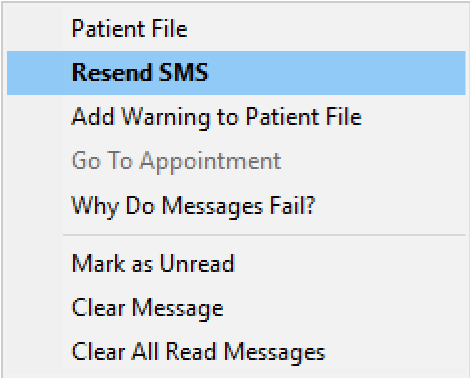
My SMS was not delivered, what can I do?

When Smartsoft receives confirmation from the mobile carrier that an SMS has failed to be delivered, a notification will appear in the **Messages** tab on the **Appointment Book**.



SMS Message Failure

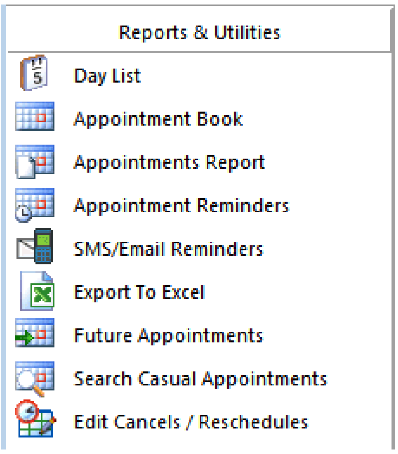
In the event of a SMS failing to send, your options are as follows:



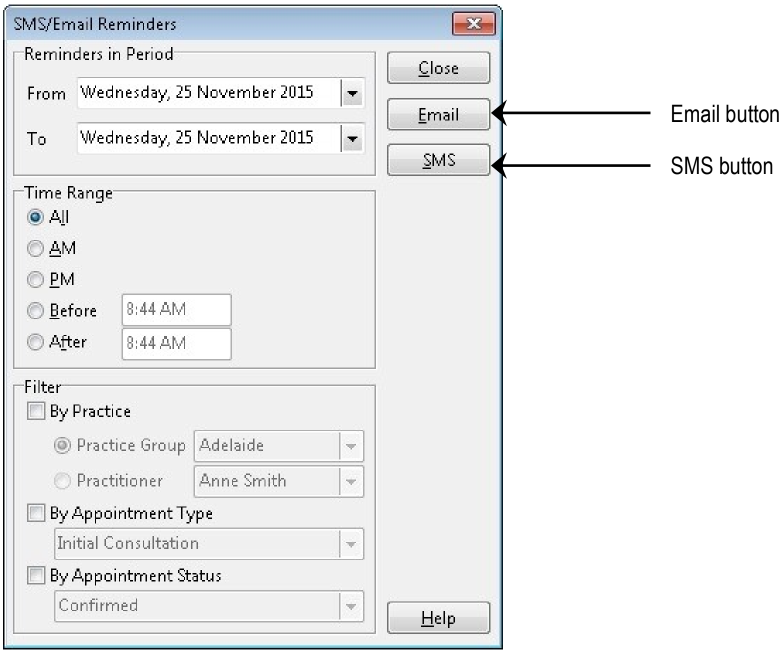
- Check that the mobile number is correct. If you believe that the number is correct you can attempt to **resend the SMS** by right-clicking the notification in the Messages tab.
- **Add a warning** to the patient file to update the mobile number on the patient's next visit by right-clicking the notification in the Message tab.
- Attempt to **call the patient** (perhaps on an alternate contact number) or **email them** to remind them of their appointment and confirm their mobile number

SMS / Email Appointment Reminder Reports

To generate a report of SMS and Email reminders, click the **Reports & Utilities** button in the bottom left hand corner of the Appointment Book.



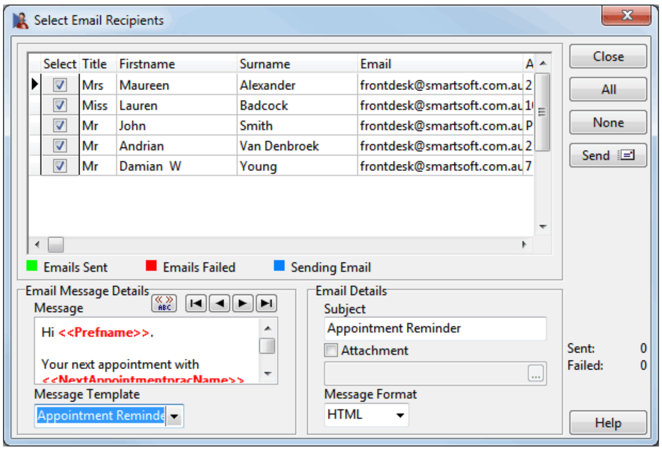
The **SMS/Email Reminders** option will enable you to send SMS messages or Emails to patients with an upcoming appointment, with a reminder set.



This can be filtered **By Practice**, **By Appointment Type** and **By Appointment Status**.

To send appointment reminders via Email, click **Email**.

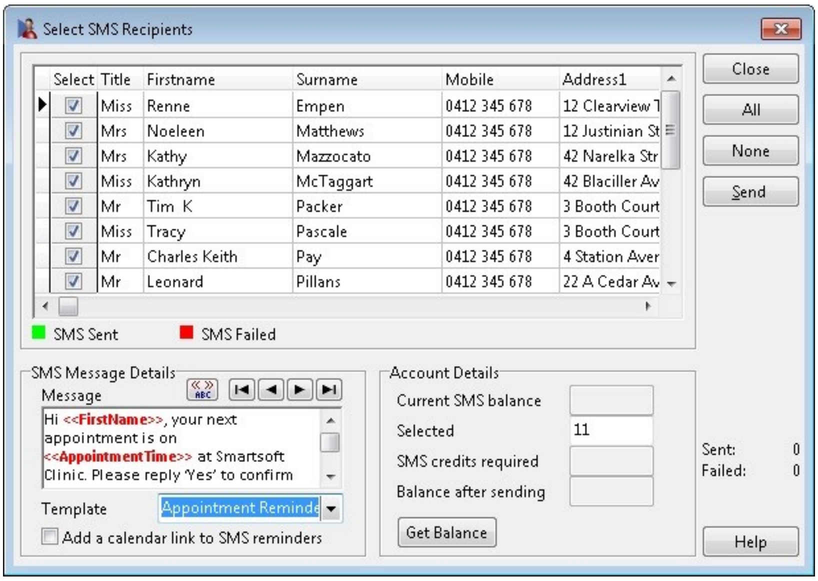
SMS / Email Appointment Reminder Reports



Type the message that you wish to send or select a standard message from the **Message Template** drop-down box. To view the message as it will be sent, click the button to replace the tags with your patient information and use the left and right arrows to scroll through your data. If you do not wish to send a message to a particular contact in the list, uncheck the box in the **Select** column next to the patient's name.

When the message is ready to send, click **Send**. *Front Desk 2017* will send each message individually, highlighting each contact as they are sent.

To send appointment reminders via SMS, click **SMS**.

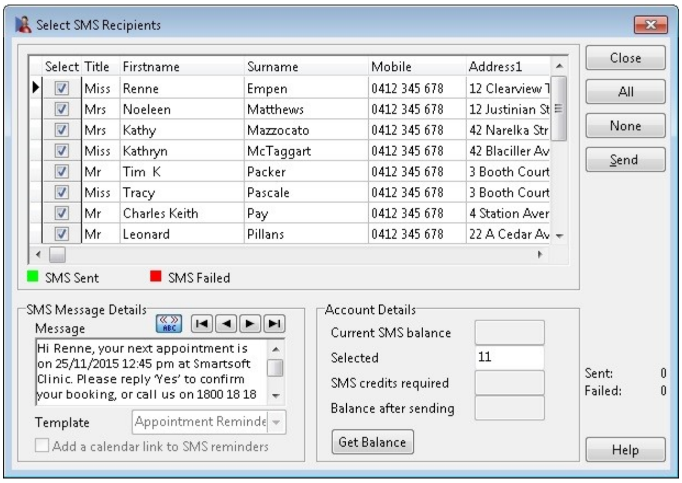


Type the message that you wish to send or select a standard message from the **Template** drop-down box. To view the message as it will be sent, click the button to replace the tags with your patient information and use the left and right arrows to scroll through your data. If you do not wish to send a message to a particular contact, uncheck the box in the **Select** column next to their name.

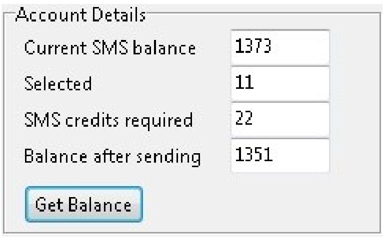
SMS / Email Appointment Reminder Reports

Select **Add a calendar link to SMS reminders** to include a link at the end of the SMS, which will allow the recipient to add the appointment to the calendar software on their phone. The added calendar appointment will provide additional appointment details and a second reminder closer to the booking. Further, on compatible smartphones the location of your practice is available on a map with GPS direction instructions.

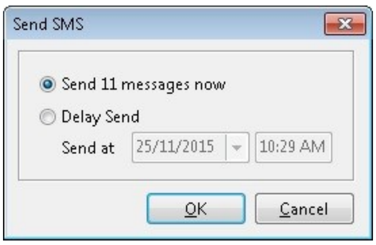
Please note **iCalendar Integration** must be enabled to use this functionality.



To view your SMS balance, click **Get Balance**. This will display your **Current SMS balance**, the number of SMS currently **Selected**, the number of **SMS credits required** and the **Balance after sending**.



Click **Send** when the message is ready. You will be prompted to either send the messages now, or to select a time and date in the future when your messages will be sent.



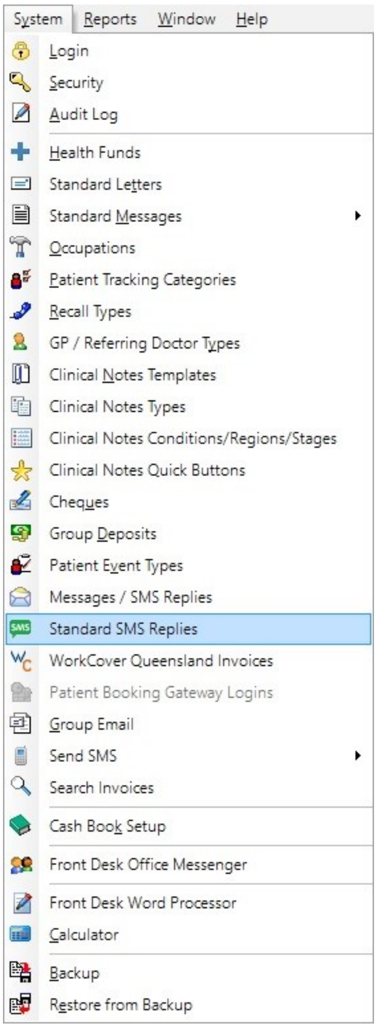
Front Desk 2017 will send each message individually, highlighting each contact as they are sent.

Standard SMS Replies

Standard SMS Replies can be setup to automatically update a patient's **Appointment Status** upon receiving a set reply to an appointment reminder message. This relies on the patient responding in a specific way, which can be prompted in the Appointment Reminder as seen in the example below:

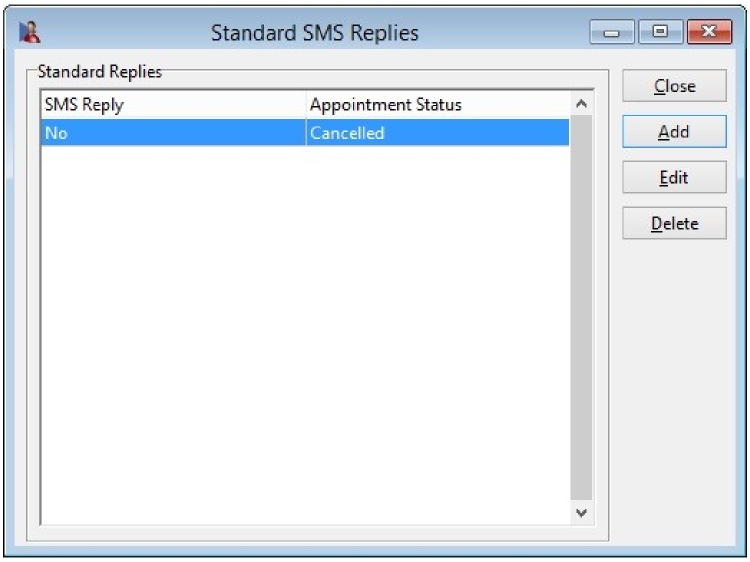
"Hi <<FirstName>>, your next appointment is on <<AppointmentTime>> at Smartsoft Clinic. Please reply '**Yes**' to confirm your booking, or call us on 1800 18 18 20 to reschedule."

To setup this feature select **Standard SMS Replies** from the **System** menu.



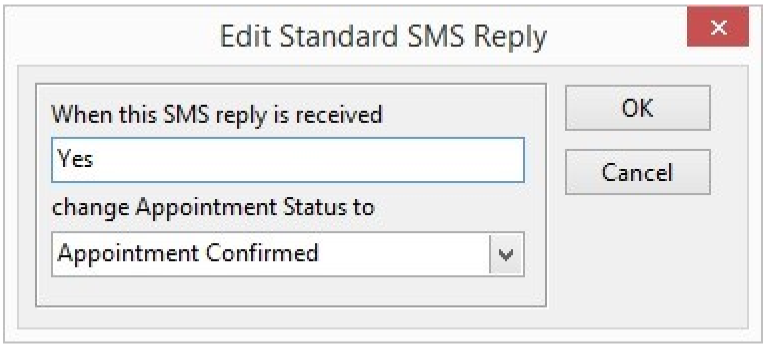
Click **Add** to create a new Standard SMS Reply.

Standard SMS Replies



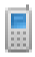
Enter the specific response you are expecting to receive, and the corresponding **Appointment Status** this response will set on the appointment. Click **OK**.

Additional **Appointment Status** can be created from the **Appointment Book** tab of **System Information** as required.



It is recommended to add additional Standard SMS Replies for variations of the expected response e.g. ‘Yes’, ‘Y’, ‘OK’ etc.

Once configured, the appointment status will automatically update on the appointment when receiving the corresponding SMS reply.



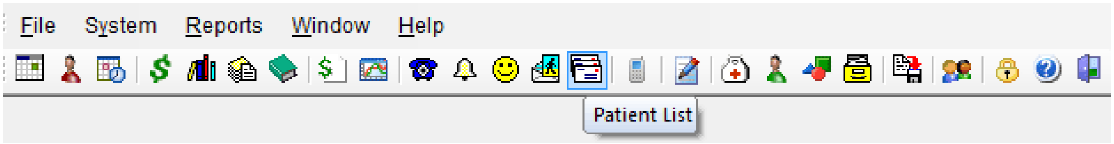
Sending SMS and Emails through Front Desk Reports

The following reports can be used to generate SMS and Email messages for a group of patients.

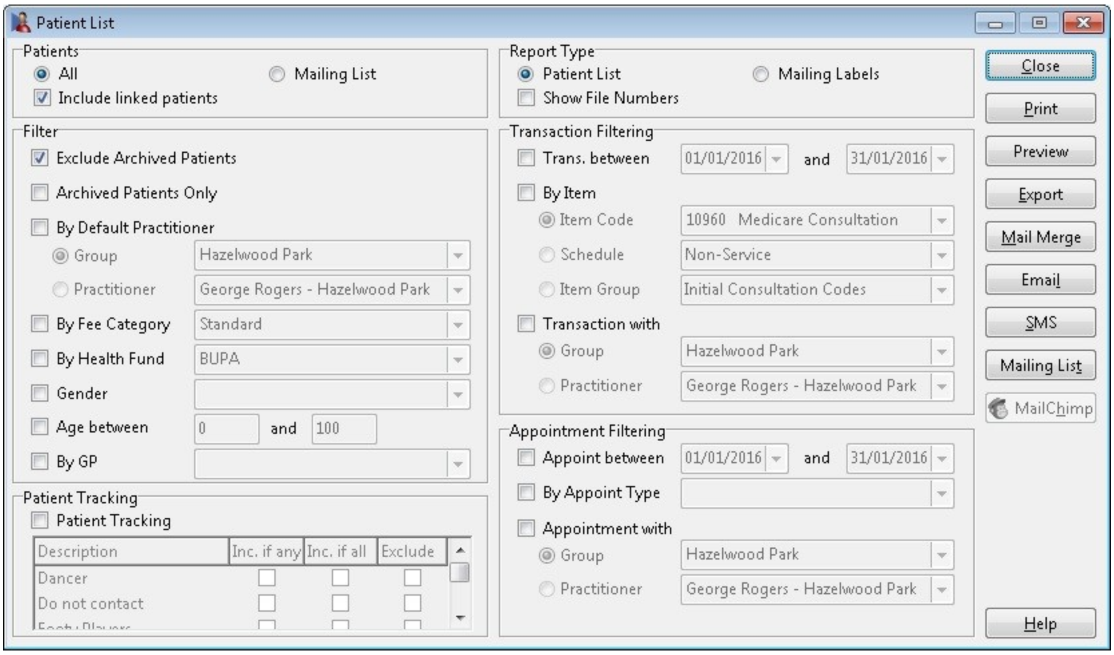
Recall Patient List
Active/Inactive Patients
Birthday List
Patient Referrals
Patient List
Events Report
GP / Medical Referrers List

For Example:

Select **Patient List** from the **Toolbar**.

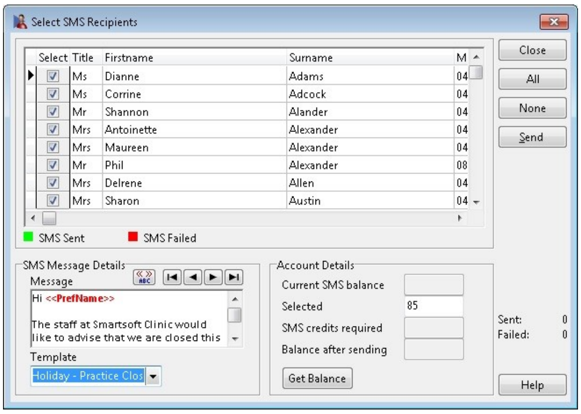


The **Patient List** function generates a list of patients with details that match a group of selected options.



Sending SMS and Emails through Front Desk Reports

Click **SMS** and the SMS dialog will appear containing the clients selected in the chosen report. This allows you to send the same text message to many patients. **Note: Only patients who have a mobile number recorded will appear on this dialog.**

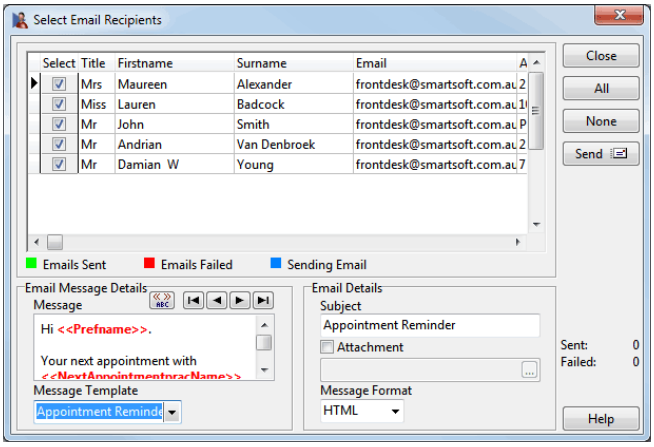


Type the message that you wish to send or select a standard message from the **Message Template** drop-down box. To view a message as it will be sent, click the button to replace the tags with your patient information and use the left and right arrows to scroll through your data. If you do not wish to send a message to a particular contact uncheck the box in the **Select** column next to their name.

Click **Get Balance** to calculate the current balance before and after sending the messages. The **Selected** field will calculate the number of contacts that have been selected. Click **Send** when the message is ready. *Front Desk 2017* will send each message individually, highlighting each contact as they are sent.

Click **Email** and a screen similar to the SMS dialog will appear. This allows you to send the same customised email message to multiple patients. **Only patients who have email addresses will appear on this dialog.** Follow the same process as above.

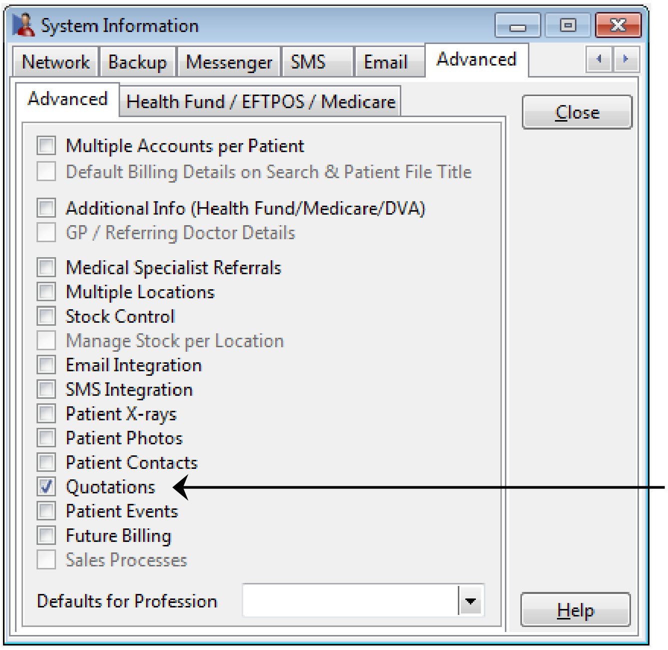
Type the subject of the email in the **Subject** field.



Click **Send** to begin sending the message. *Front Desk 2017* will send each message individually, highlighting each contact as they are sent.

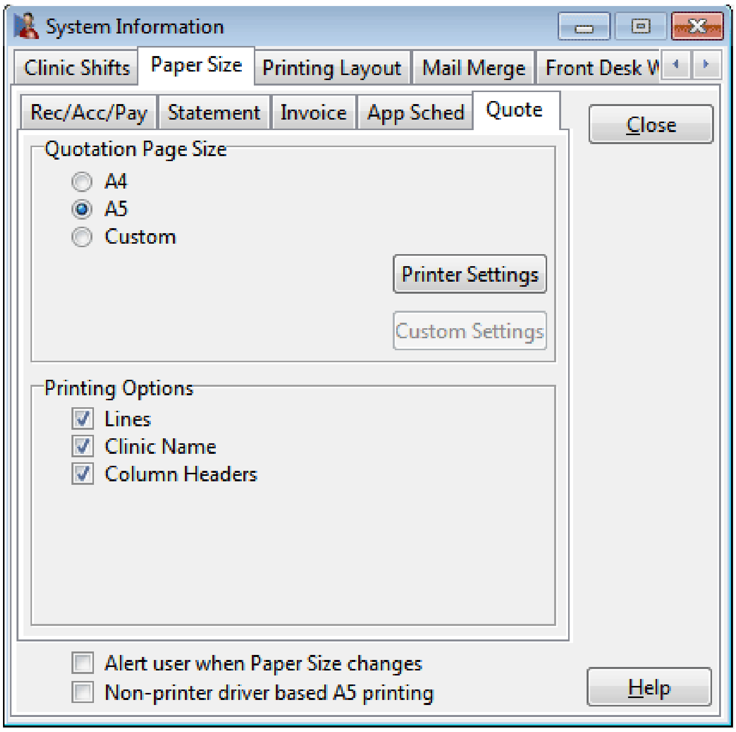
Quotations

Select the **Advanced** tab in **System Information**. The **Quotations** option can be used to create quotations for products and services.



Quotations option

When setting this option you will need to restart Front Desk®. Once restarted, go back to **System Information** and select the **Printing Options** tab.



A new **Quote** tab will now be available.

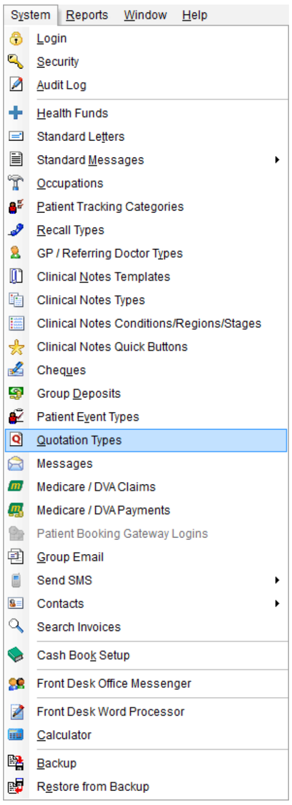
Click this tab and select your preferred paper size for quotations.

ADVANCED FEATURES

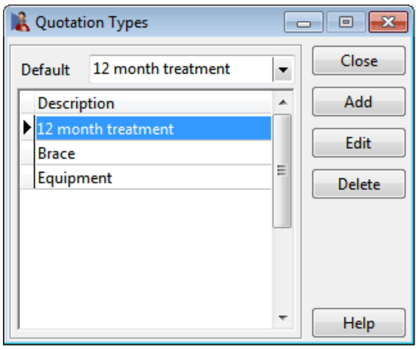
Quotations Types

Before you can start using the quotation facility you will need to have at least one **Quotation Type**.

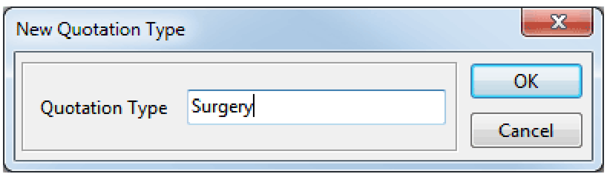
Select **Quotation Types** from the **System** menu.



The following window will appear.



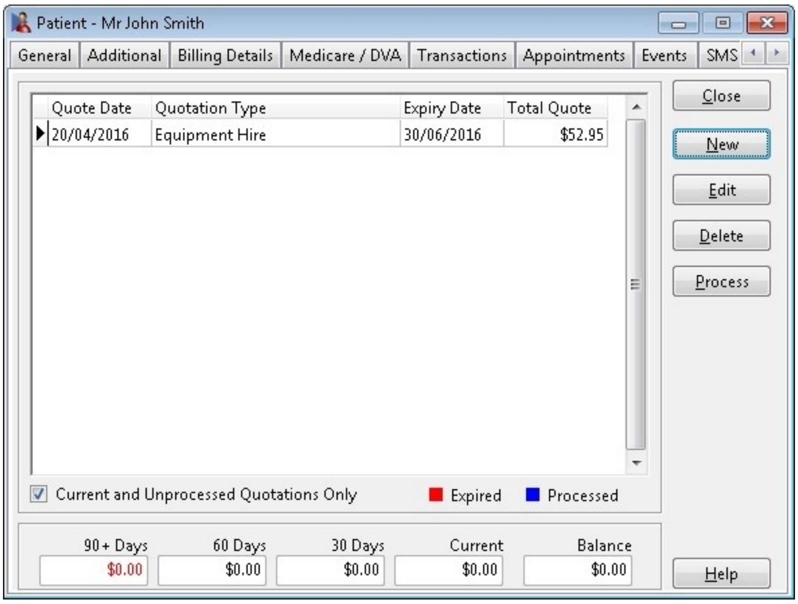
Use the **Add**, or **Edit** or **Delete** options to manage the **Quotations Types** available.



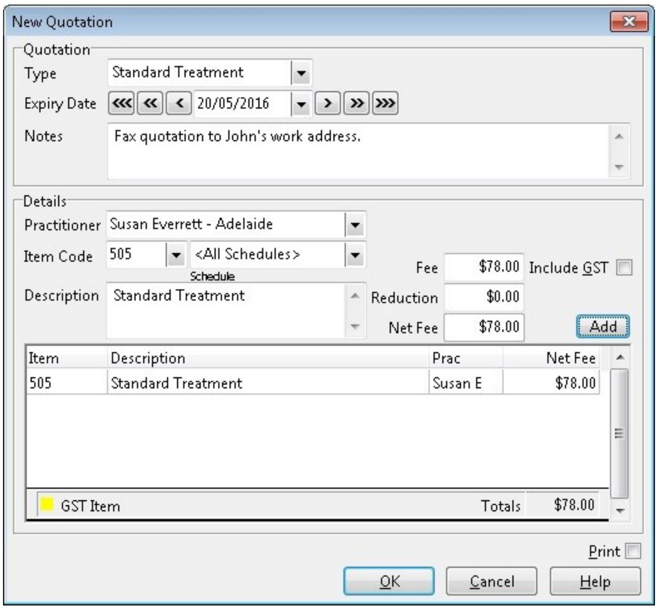
Select one of your quotation types to be the default from the **Default** drop-down box.

Patients Quotations

Open a patient file and select the **Quotations** tab.



To create a new quote, click **New**. The following window will be displayed.



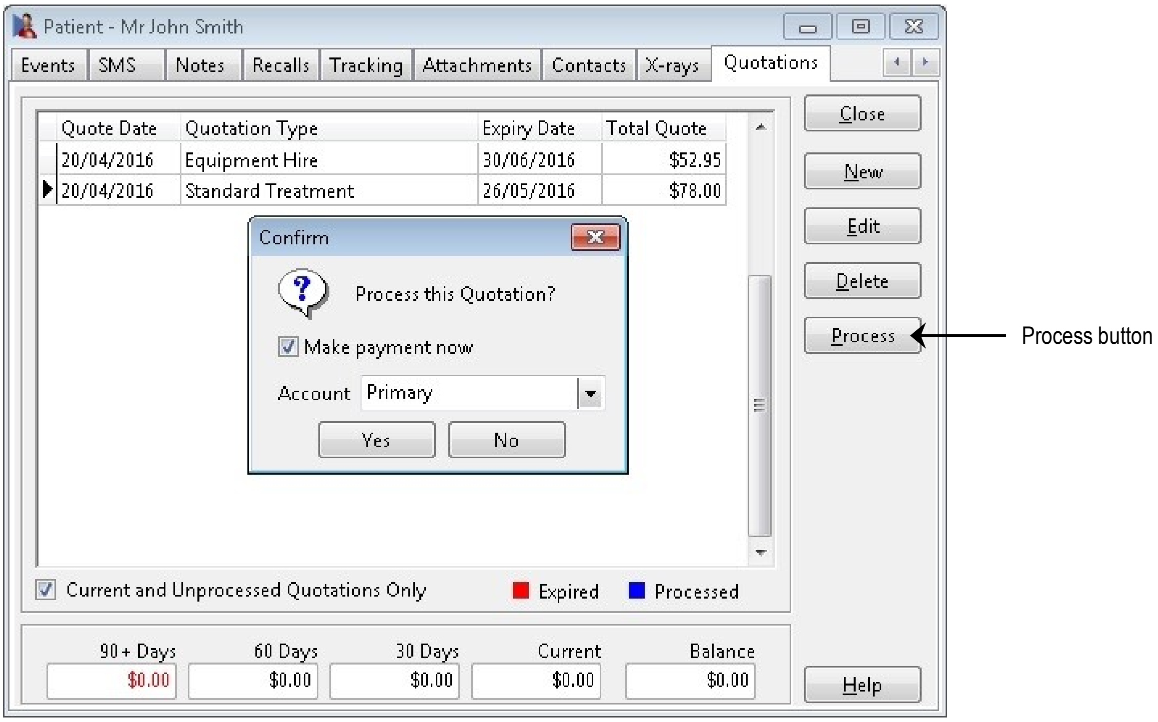
Select a **Quotation Type** from the drop-down box and enter any notes that are required and an **Expiry Date** for the quotation.

Fill in the additional information as required, e.g. practitioner, item code, amount. Click **Add** to add the item to the quote. If you wish to print the quotation make sure the print box is ticked, and click **OK**.

The quote will be entered into the patient file under the **Quotations** tab and may be edited or deleted as required.

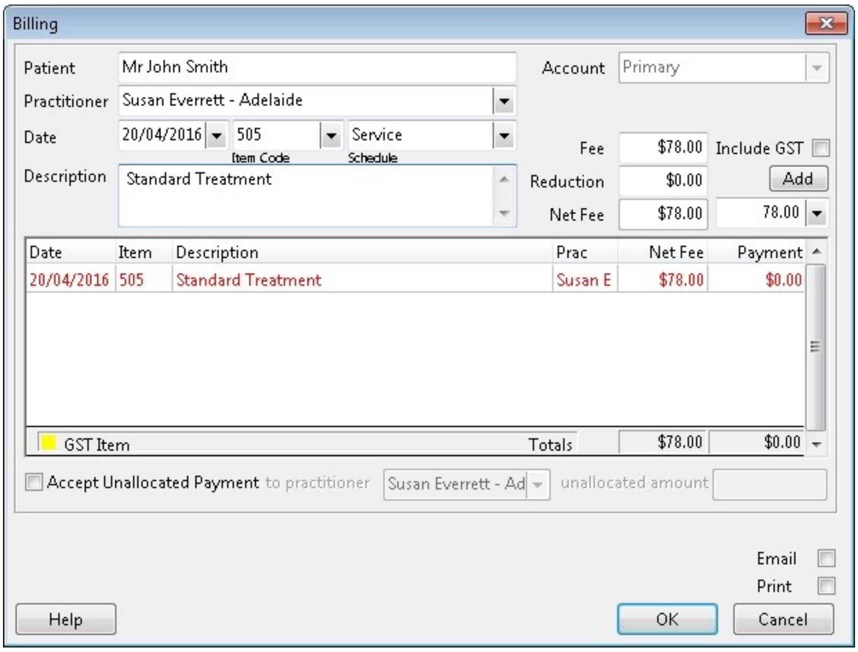
Patients Quotations

To convert a quotation into an invoice, highlight the quotation and click **Process**.



You will be prompted to **Process the Quotation** with the option to **Make Payment Now**.

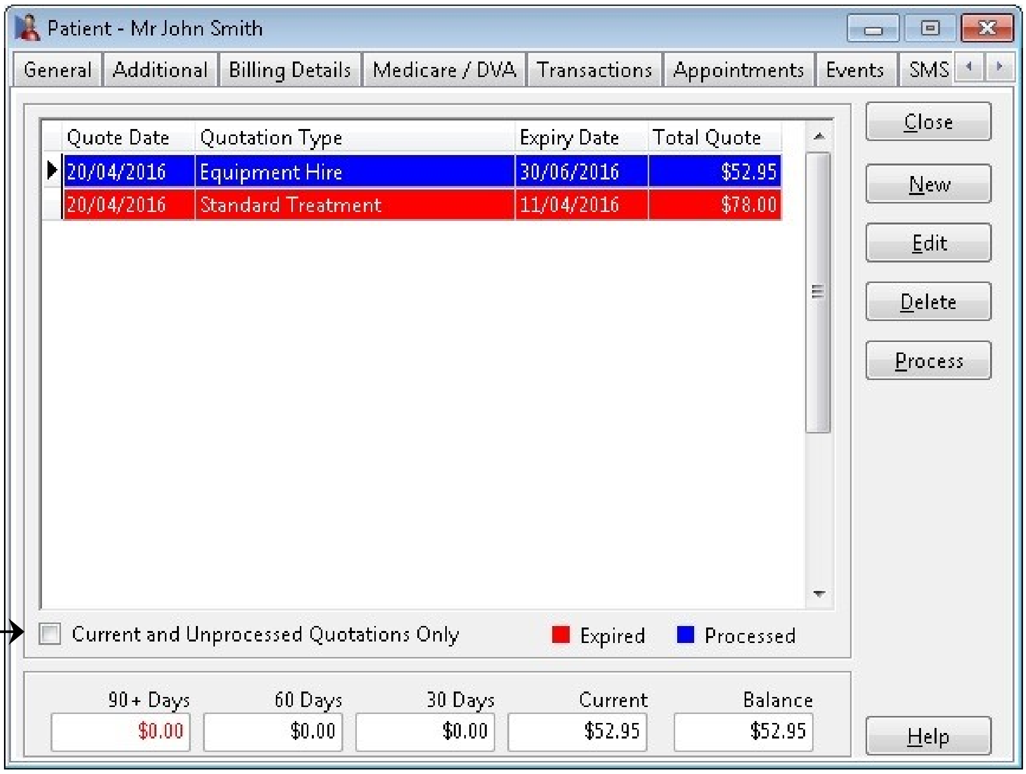
If you select the **Make Payment Now** option it will take you directly to the **Payment** screen. Otherwise, the **Billing** screen will appear as shown below.



Patient Quotations

To view expired or processed quotes, uncheck the **Current and Unprocessed Quotations Only** option.

If a quotation has been processed or it has expired, it will automatically change colour. Expired quotations will be shown in red and processed quotes will be shown in blue.

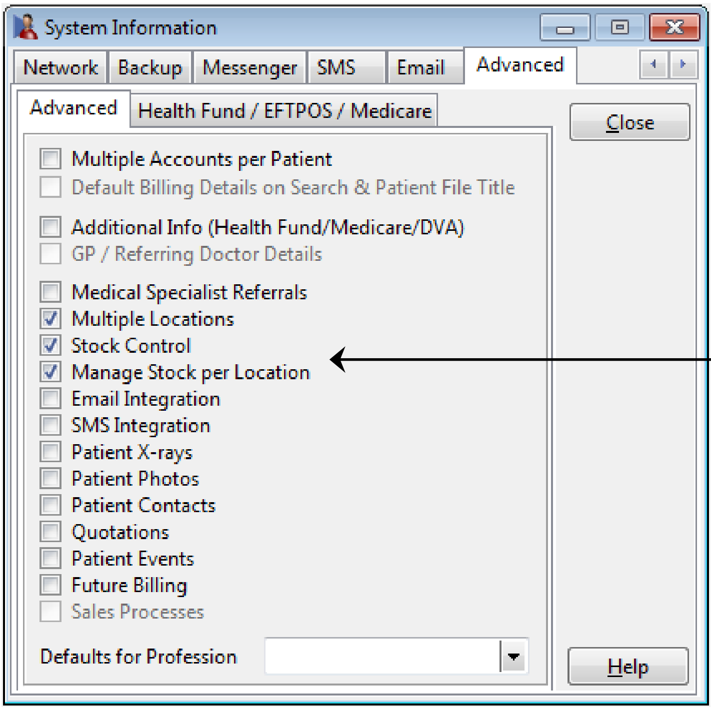


Uncheck this option to view past and processed quotes

Advanced Features

Stock Control

Select the **Advanced** tab in **System Information**. The **Stock Control** option should be enabled to keep a track of stock levels and details of suppliers. If you are using the **Multiple Locations** option, you can **Manage Stock per Location** by checking this option, which will record individual stock levels at each location.

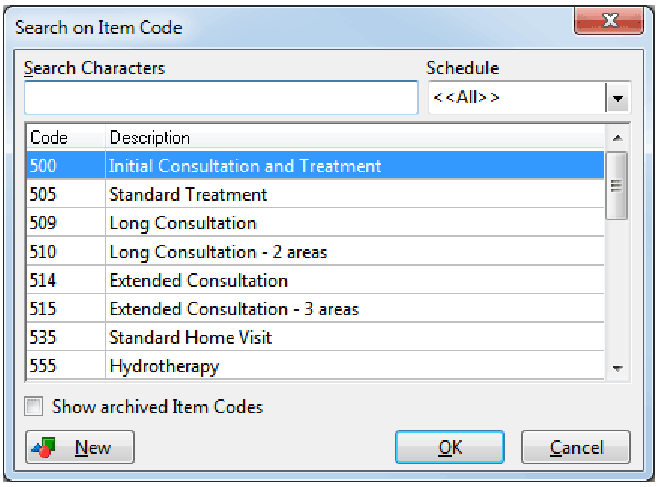


Stock Control and **Manage Stock per Location** options

You will need to restart *Front Desk 2017* for the changes to take effect.

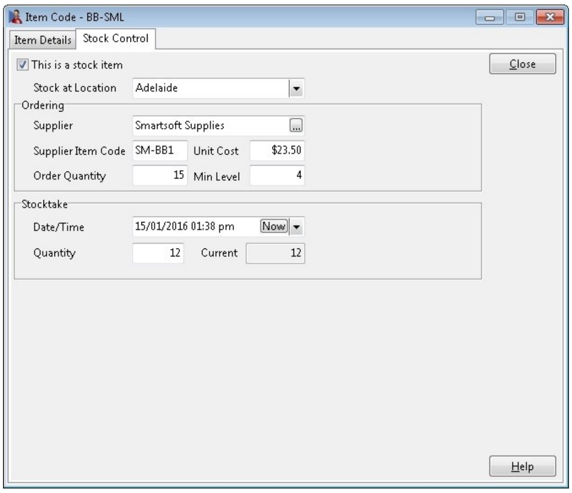
Go to **Item Codes** from the **Toolbar** or from the **File** menu.

Select an item code that requires stock control from the list.



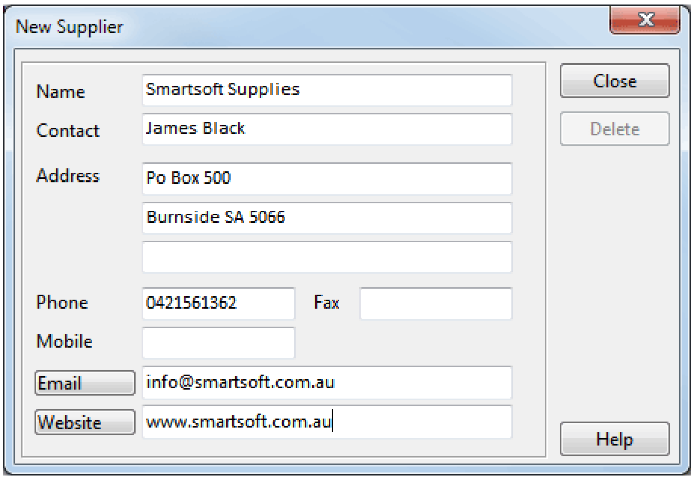
Stock Control

The **Item Codes** screen will now have an additional **Stock Control** tab.

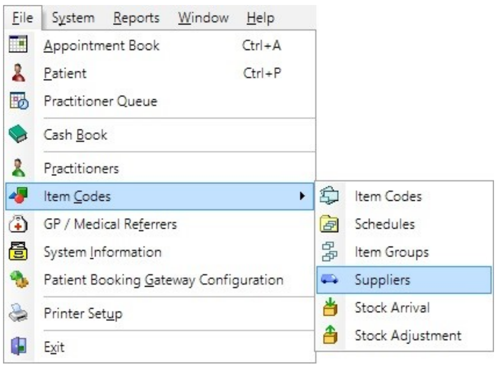


Select **This is a stock item**.

To create a new supplier click browse from the **Supplier** field and then click **New**.



New suppliers can also be added from the **File** menu.

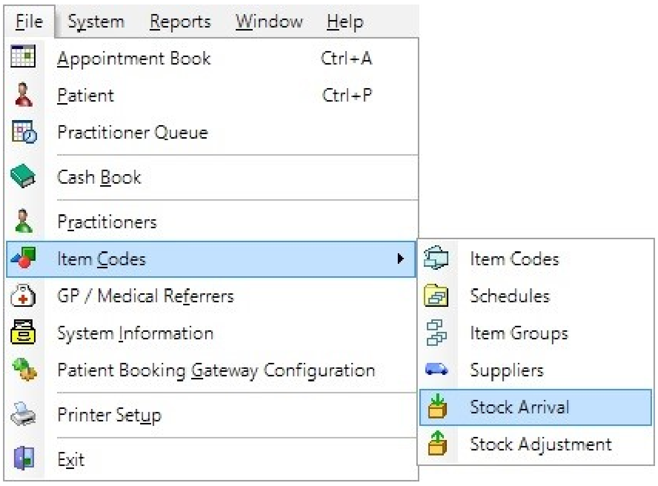


Stock Control

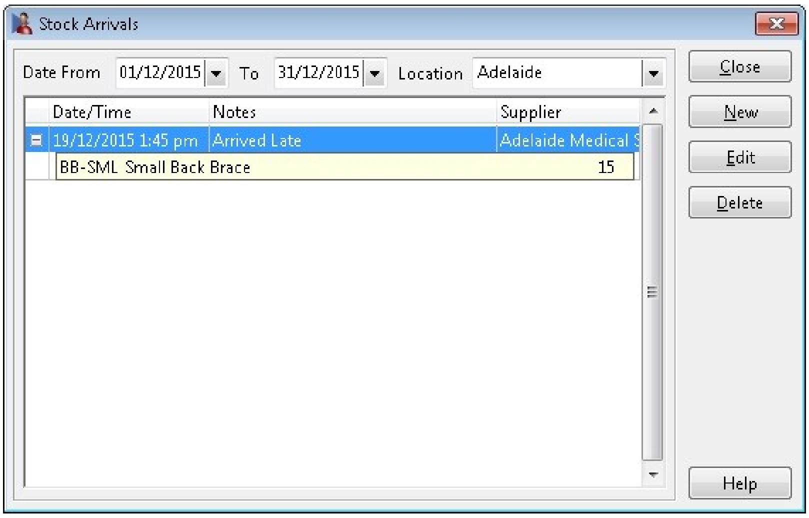
The following details are required for stock control:

- **Suppliers code** is the code for this item which is used by your supplier and may be required for ordering
- **Unit cost** is the last price paid for one of these items
- **Order quantity** is the number of these items generally ordered at one time
- **Minimum level** is the level which the stock can reach before re-ordering is required
- **Date/Time** is the last time a stock take was done on this product
- **Quantity** is the number of items present at the last stock take.
- **Current** is the current number of stock items which should be available, taking into account the number of items available at the time of the stock take, number of items sold and number of these items purchased since the stock take.

As new stock arrives it needs to be entered into the system in order to be able to calculate accurate stock levels. Select the **Stock Arrival** option from the **File** menu.



Click **New** to enter the details of new stock arrivals.

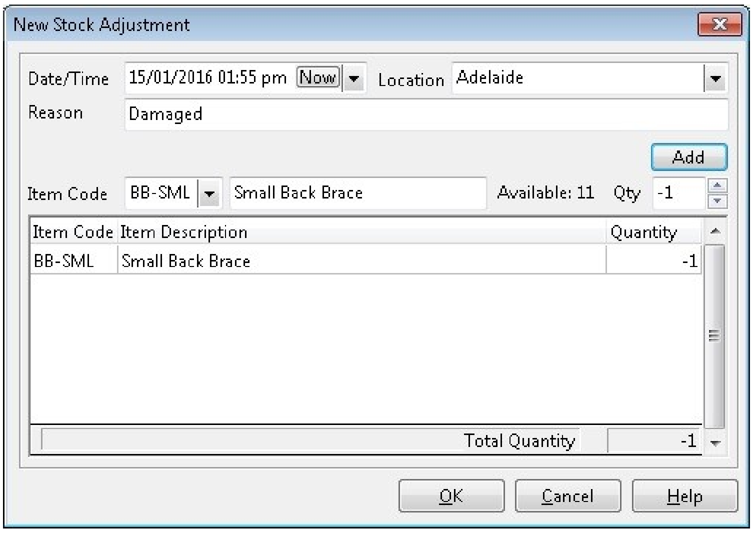


Stock Control

Enter the **Date/Time** that the stock arrived, any **Notes** regarding the stock, the **Supplier**, **Item Code** and the **Quantity**. Click **Add** to add this item to the list of arrived items.

A **Stock Adjustment** function is available to adjust stock levels, e.g. for stock used in the clinic, breakages or missing stock. Select the **Stock Adjustment** option from the **File** menu.

Click **New** to enter the details of a stock adjustment.

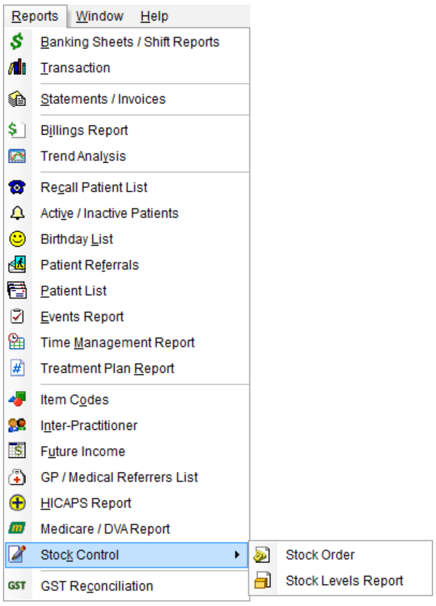


Enter a **Date**, **Reason**, and **Location** (if applicable), select the stock item (**Item Code**), quantity (**Qty**) and click **Add** to add a stock level adjustment.

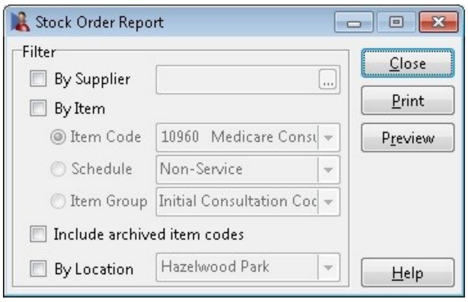
Entering in the stock arrival or adjustment information will update the **Stock Control** level under **Item Codes** or in the **Stock Control Reports**.

Stock Control Reports

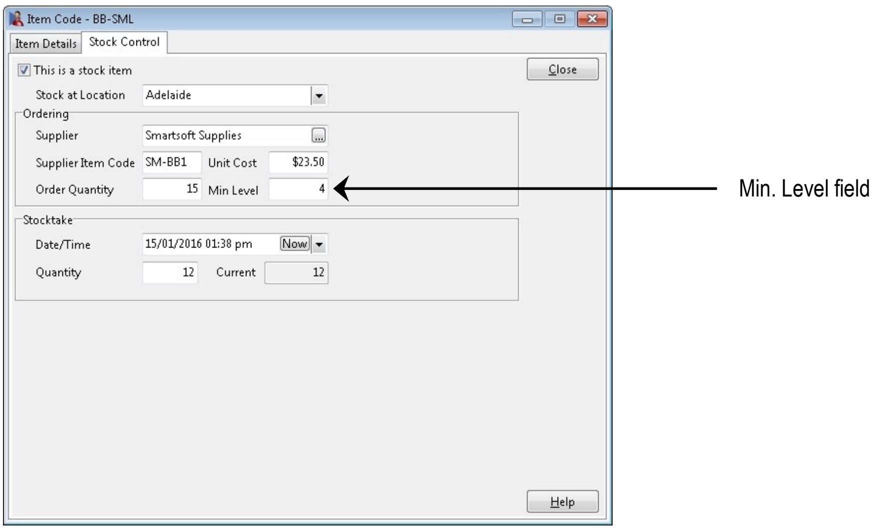
Stock control reports can be generated from the **Reports** menu.



The **Stock Order** report will list items that have fallen below the minimum stock level and require reordering.

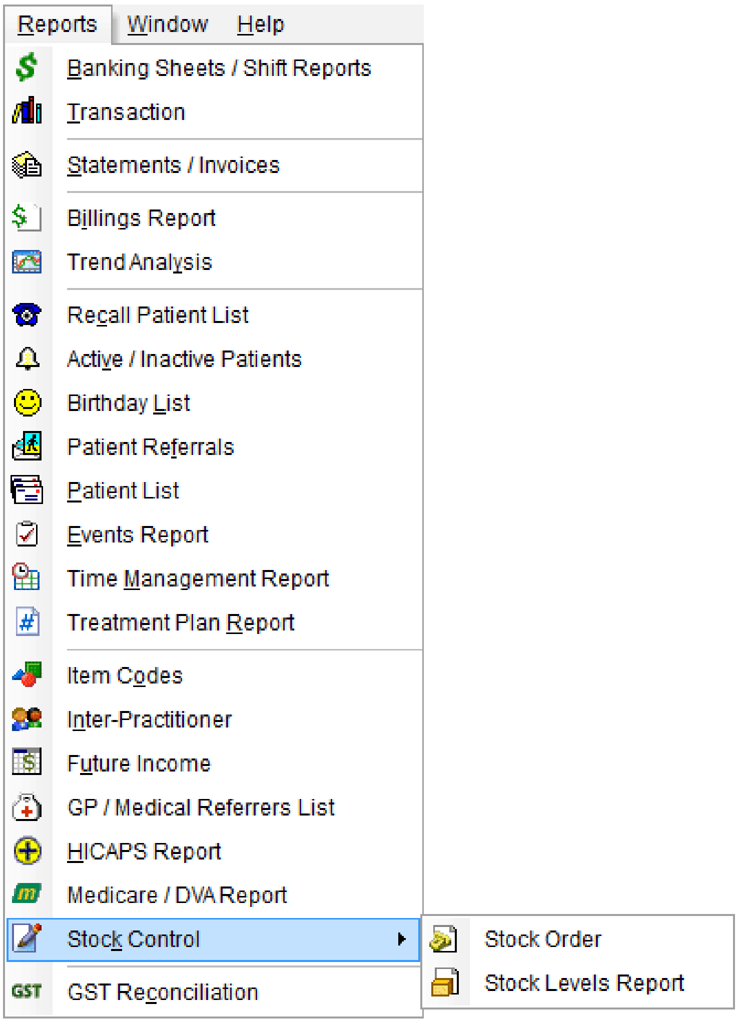


To set the minimum level for a stock item, go to the **Stock Control** tab on the **Item Code** screen and enter the amount in the **Min Level** field.

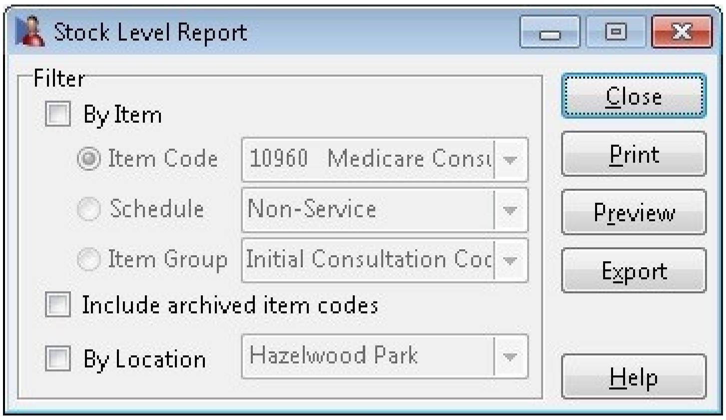


Stock Control Reports

Select **Stock Levels Report** from the **Reports** menu



This report will provide the current stock levels for all stock items.



The **Stock Levels Report** can be filtered by **Item Code**, **Schedule** or **Item Group**.

Select **Include archived item codes** to include items that have been archived.