

Release Notes

Version 7.0.03

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1. 'New' Ability to track and manage practice plans at a Cashbook level

A new tracking fee option has been added to Aerona to allow practices to track fees associated with treatments completed from external or internal practice plans. This enables clinics to pay clinicians based on the treatments they have completed in the event that the patient pays a monthly fee rather than paying for individual treatments.

Create New Treatment Item

Item Description

Item Code

Chart Group Non-Chartable

Enabled

Menu Group ▼

Colour ▼

VAT ▼

Add Price

Care Plan	Payment Code	Discount (%)	Patient Fee	Flexible Price	Insurer Fee	Tracking Fee	Requires Approval	Enabled
Private	<input type="text"/>	0.00	0.00	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[Save](#)

The new tracking fee option can be used to track the value of these treatments and will now show as 'Tracking Fee' on the Cashbook reports. This option can also be used to see if the care plan is profitable for the practice.

Cashbook Detailed by Date ◀ 1 - 8 ▶

User Jessica Jones Date (From) Date (To)

Payment Location	Allocation Date	Completed Date	Payment Date	User/Shop	Patient	Description	Payment Note	Price	Tracking Fee	Discount	VAT	Net	Refund	Method	Amount
Aerona Dental Test	28-09-2020	28-09-2020	28-09-2020	Jessica Jones	Derek Test	Crown		10.00	30.00	0.00	0.00	40.00	0.00	Direct Debit	40.00
Aerona Dental Test		25-09-2020		Jessica Jones	Many Sweeney	Extraction		0.00	0.00	0.00	0.00	0.00	0.00		0.00
Aerona Dental Test		28-09-2020		Jessica Jones	Derek Test	fill		0.00	50.00	0.00	0.00	50.00	0.00		50.00
Aerona Dental Test		28-09-2020		Jessica Jones	Derek Test	Filling		0.00	99.00	0.00	0.00	99.00	0.00		99.00
Aerona Dental Test		28-09-2020		Jessica Jones	Derek Test	Filling		0.00	99.00	0.00	0.00	99.00	0.00		99.00
Aerona Dental Test	28-09-2020	28-09-2020	28-09-2020	Jessica Jones	Derek Test	Periodontal Treatment		30.00	70.00	0.00	0.00	100.00	0.00	Direct Debit	100.00
Aerona Dental Test	02-09-2020	27-08-2020	02-09-2020	Jessica Jones	Anne Hassan	Surgical Extraction		120.00	0.00	0.00	0.00	120.00	0.00	Cash	100.00
Aerona Dental Test	27-08-2020	27-08-2020	27-08-2020	Jessica Jones	Anne Hassan	Surgical Extraction		120.00	0.00	0.00	0.00	120.00	0.00	Cash	120.00

2. Enable Patient Portal updates

The Enable Patient Portal option within Patient details has been updated to be more transparent and will now only be automatically checked after a patient has registered on the patient portal. The below information will now be displayed informing the user that patient must register for the portal.

Patient Portal Status

Not Registered (i)

Patient must first register with the portal

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Once a patient has registered on the portal the below information will be displayed to the user.



The practice will then have the option to uncheck this in order to allow the patient to reuse their email address to register another account.



3. 'New' High Value Patient alert

A new High Value patient alert has been added to the patient details section. This can be added to identify high value patients and is displayed alongside the patient name in the banner.



4. Medical History for multiple appointments on the same day

When a patient has more than one appointment on the same day, they are presented with multiple medical history forms to complete in the Patient or Practice Portal.

In this release when a patient completes the medical history for any one of these appointments the medical history for all other appointments on that day will be updated with the same medical history information. Any other medical history notifications for that day will then be automatically removed from the notifications area within the Patient or Practice portal.

5. Updated Email for SMS Credit top-up

The email received when SMS go below the practice set amount will now inform the user that they can easily top-up their SMS credits within the Communication section and therefore no top-up phone calls are necessary.

6. Reporting changes

- **Treatment Flow Report**

'Planned with' column added to inform the user who the appointment was with when the treatment was planned. Private and Care plan/Insurance treatments and treatments with a discount applied now appear in report.

- **Current Price List**

The current Price List report has been updated to include a Care plan pre-filter. It has also been updated to include the following new columns – Chart group, Patient and Insurance Fee and Treatment and Price enabled columns. The columns have been reordered and this now runs across the business for multi-site practices.

- **Average Daily Yield**

Average daily yield report has now been updated to run dynamically, rather than based on the monthly KPI value for the clinician.