

PracticeWorks

NSP PORTAL

Phase 1
User Guide

Goal

Create an On Line presence for:

1. Issuing Work Orders to NSPs (National Service Providers)
2. Completing SCRs (Service Call Reports) by NSP field Technicians
3. Creation and submission of Invoices by the NSPs to PracticeWorks
4. The ability of NSP Principals and PracticeWorks Management to track the status of all Work Orders through the entire process
5. Greater reporting and analysis of procedures done in the field

Overview

1. Support Implementations will contact the NSP firm and get confirmation that the firm will take the case.
2. Support or Implementations will create the work order directly from Clientele
3. The NSP will be notified by email that a New Work Order has been created with a link to the Portal.
4. An NSP user with Dispatch rights will assign the Work Order to a Technician who will receive an email notification of a new Work Order with a link to the call.
5. Upon completion of the work, the Technician will "Submit" the completed SCR.
6. SCR@PracticeWorks.com will receive notification that an SCR awaits approval.
7. Upon approval the NSP user with "Accounting" rights will receive email with a link to the Portal.
8. The NSP Accountant will complete the Invoice portion of the Process and Submit
9. The PW Director of Strategic Partners (Todd Rees) will receive email notification indicating that the Invoice awaits approval.
10. Upon approval, Datrose will receive authorization to make payment
11. At any point, NSPs with Administrative Rights will be able to see all SCRs and their status.

Administrative Setup

User Levels

- Admin: Full access to all levels of the system
- Dispatch: Has the ability to assign calls to those at the Technician level
- Technician: Can only see calls assigned to him/her with the ability to complete the SCR and submit
- Accounting: Completes the Invoice once the SCR has been approved by PW

Accessing the Portal: (Note: the Initial User should be the Owner of the Firm)

The Owner will receive an email inviting him / her to begin the process. The email will provide a link to the Web Portal.

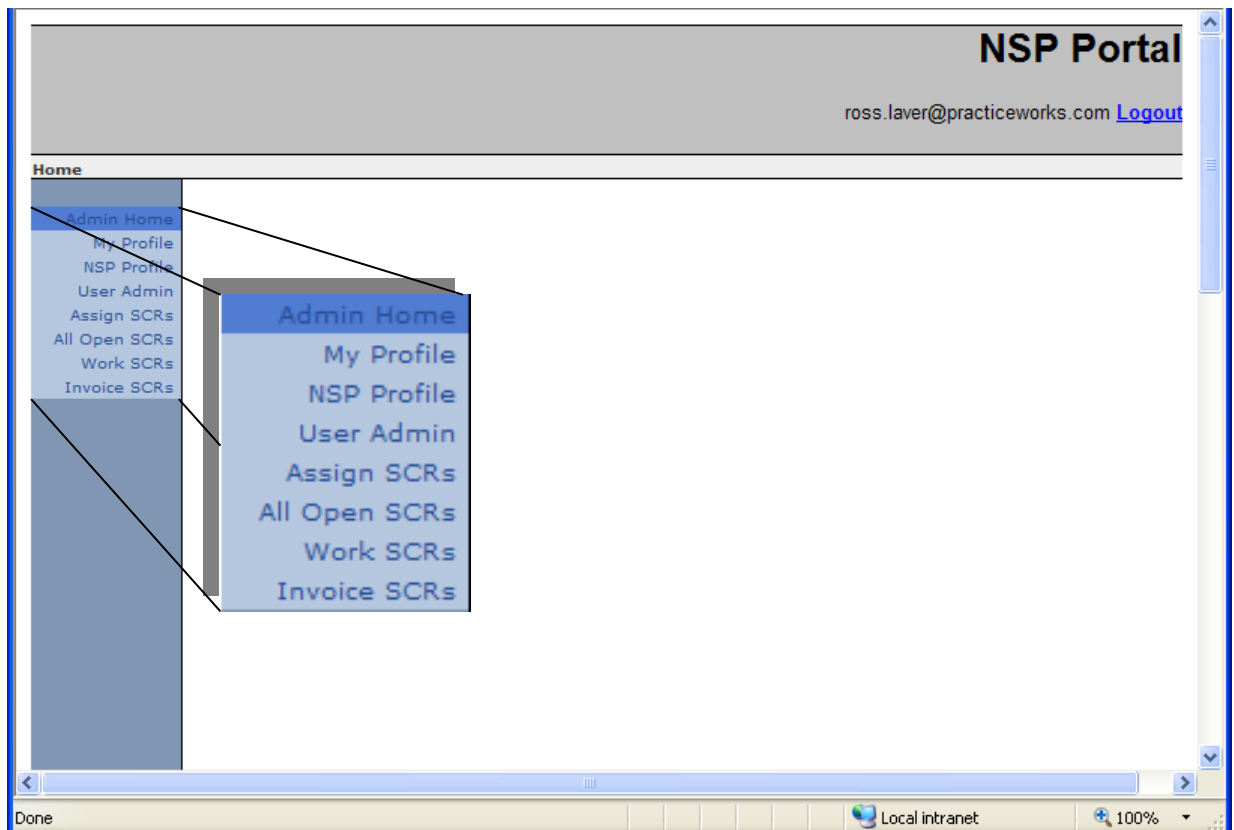
Login: <Administrators Email Address>

Password: <Will be communicated in email invitation>

Administrative Switchboard

Offers:

1. **My Profile:** Each user may update his profile
2. **NSP Profile:** Administrator may change the Firm's Profile settings
3. **User Admin:** Administrators can Edit or Delete users or Change Certification(s)
4. **Assign SCRs:** Those with Dispatch Rights can Assign or ReAssign Work Orders.
5. **All Open SCRs:** Administrators may see all SCRs with Status for each
6. **Work SCRs:** Techs review Work Order Details and Complete the SCR
7. **Invoice SCRs:** Individuals with Accounting Rights complete the invoice.



My Profile

My Profile

Email:

Password:

Phone:

Cell Phone:

First Name:

Last Name:

☒ Admin
☐ Dispatch
☐ Technician
☐ Accounting

My Certifications

☐ 8000/8000C ☐ Iluma ☐ Dual/Ortho
☐ 9000/9000C ☐ K1000 ☐ PracticeMgmt
☐ CR7400 ☐ K2100/2200 ☐ Sensors

Make Changes to the profile and then Click “Update” to save the changes. The Password should be changed the first time the system is entered.

NSP Profile

Company Profile

Name:

Primary Email: [More Info..](#)

Primary Phone:

Address:

City:

State: Zip:

Make Changes to the profile and then Click “Update” to save the changes.

User Admin

User Admin allows Administrators to

NSP Portal

ross.laver@practiceworks.com [Logout](#)

Home : [User Admin](#) : [Edit Users](#)

[Admin Home](#)
[My Profile](#)
[User Admin](#)
[Assign SCRs](#)
[Work SCRs](#)
[Invoice SCRs](#)

Actions	First	Last	Office	Cell	Admin	Dispatch	Tech	Acct
Certs Edit Delete	Memory	S	123-456-7890	123-456-7890	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certs Edit Delete	Paul	Heberle	987-123-4569	123-456-7890	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Certs Edit Delete	Ross	Laver	123-456-7890	123-456-7890	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certs Edit Delete	Todd	Rees	123-456-7890	987-123-4567	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certs Edit Delete	Tommy	Snacks	123-456-7890	123-456-7890	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1. Add a New User
 - a. Enter all fields
 - b. Be sure to check appropriate User Level(s)

The screenshot shows a 'My Profile' form with the following fields: Email, Password, Office Phone, Cell Phone, First Name, and Last Name. To the right of these fields are four checkboxes for user levels: Admin, Dispatch, Technician, and Accounting. At the bottom of the form is an 'Add User' button. An arrow points from the 'Edit Existing Users' button (located above the form) to the form itself. Another arrow points from the 'Add User' button to the 'Add User' button. A third arrow points from the 'Edit Existing Users' button to the 'Edit Existing Users' button.

- c. Click "Add User" when done
 - d. Click "Edit Existing Users" to return to the User Admin Screen
2. Existing Users
 - a. Delete – Deletes the User
 - b. Edit – Use this to change the name and/or phone numbers users Rights
 - c. Certs - Update Certifications

Home : User Admin : Edit Users

Add New User

Actions	First	Last	Office	Cell	Admin	Dispatch	Tech	Acct
Certs Edit Delete	Barrett	Nikkel	123-456-7890	123-456-7890	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Certs Edit Delete	Hybrid	Man	123-456-7890	123-456-7890	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Certs Edit Delete	Joe	Technician	123-456-7890	123-456-7890	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Certs Edit Delete	Johnny	Dispatcher	123-456-7890	123-456-7890	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certs Edit Delete	Ross	Laver	123-456-7890	123-456-7890	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certs Edit Delete	Suzie	Accounting	123-456-7890	123-456-7890	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Certs Edit Delete	Tommy	Snacks	123-456-7890	123-456-7890	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

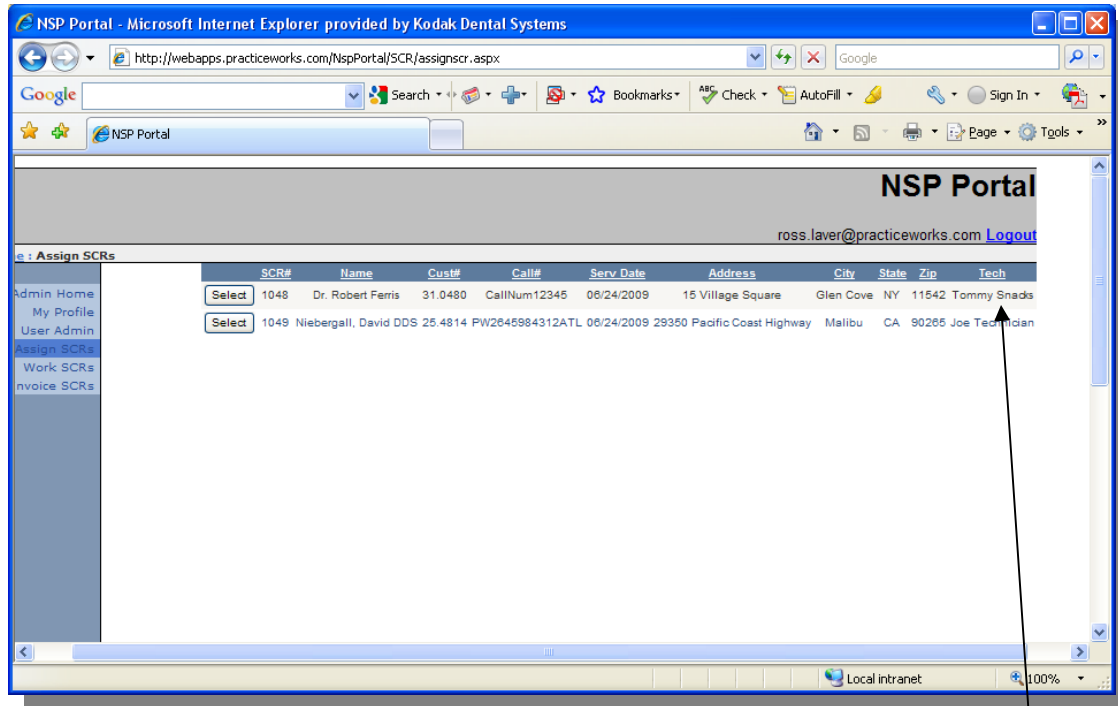
Certifications for Barrett Nikkel

<input checked="" type="checkbox"/> 8000/8000C	<input type="checkbox"/> Iluma	<input checked="" type="checkbox"/> Oral/Ortho
<input checked="" type="checkbox"/> 9000/9000C	<input checked="" type="checkbox"/> K1000	<input type="checkbox"/> PracticeMgmt
<input checked="" type="checkbox"/> CR7400	<input checked="" type="checkbox"/> K2100/2200	<input checked="" type="checkbox"/> Sensors

Update Certifications

Assigning SCRs

Allows the Assigning or ReAssigning Work



1. Note that in the screen above the first item is assigned to "Tommy Snacks"
2. Click "Select" next to the case you wish to Assign or ReAssign. The Assign Dialogue Box will open
3. Click the Drop Down next to Assign SCR and the names of those with "Tech" rights will be displayed.

SCR#: 1048

AcctNum	31.0480	Bill To	PracticeWorks
RefCallNum	CallNum12345	ServiceType	Other
ServiceDateReq	08/24/2009	Soft Install	
RVGModel	RVG 5100	CRScanner	
GenModel		Software	
Illuma		IOCamera	
PanCeph		Other	

Service Requested

I am putting some information here. Old school RVG 5100. The only thing we have to fear is fear itself!!

Assign SCR

Tommy Snacks

Barrett Nikkel
Tommy Snacks
Ross Laver
Hybrid Man
Joe Technician

ReAssign SCR

4. Click the name of the Tech to which the work will be assigned and then Click "ReAssign SCR"
5. The Name of the Tech for that Work Order now shows the name you selected.

NSP
 ross.laver@practiceworks

SCR#	Name	Cust#	Call#	Serv Date	Address	City	State	Zip	Tech
Select 1048	Dr. Robert Ferris	31.0480	CallNum12345	06/24/2009	15 Village Square	Glen Cove	NY	11542	Hybrid Man
Select 1049	Niebergall, David DDS	25.4814	PW2645984312ATL	06/24/2009	29350 Pacific Coast Highway	Malibu	CA	90265	Joe Technician

SCR#: 1048

AcctNum	31.0480	Bill To	PracticeWorks
RefCallNum	CallNum12345	ServiceType	Other
ServiceDateReq	06/24/2009	Soft Install	
RVGModel	RVG 5100	CRScanner	
GenModel		Software	
Iluma		IOCamera	
PanCeph		Other	

Service Requested
 I am putting some information here. Old school RVG 5100. The only thing we have to fear is fear itself!!

Assign SCR Hybrid Man ReAssign SCR

6. When the Case is ReAssigned, an Email is sent to the tech to whom the case is assigned. The tech to which it had been assigned will also receive an email.

NEW SCR Assignment Notification - Message (HTML)

Message Adobe PDF

Reply Reply to All Forward
 Respond

Delete Move to Folder Create Rule Other Actions
 Actions

Block Sender Safe Lists Not Junk
 Junk E-mail

Categorize Follow Up Mark as Unread
 Options

Find Related Select
 Find OneNote

From: PracticeWorks NSP Portal [NSPnotifications@practiceworks.com]
 To: Ross Laver
 Cc:
 Subject: NEW SCR Assignment Notification
 Sent: Mon 6/29/2009 10:00 AM

Ross Laver,

 You have been assigned a new SCR (SCR#:1048). For more info, logon to the NSP portal and click on the MySCRs in the left hand menu.

Customer Contact Information
 Customer: Dr. Robert Ferris
 Address: 15 Village Square
 Glen Cove, NY 11542
 Email:
 Phone: 516 674 4557
 Contact:

Service Requested By Customer
 I am putting some information here. Old school RVG 5100. The only thing we have to fear is fear itself!!

Thanks,
 The NSP Portal

All Open SCRs

	Scr #	Cust #	Call #	Status
View Details	1078	17.102394	40-41138544	PENDING INVOICE
View Details	1135	17.100521	54911ATL8	ASSIGNED TO NSP
View Details	1100	05.2835	34842ATL8	CANCELLED
View Details	1075	31.0433	6987atl8	SCR REJECTED
View Details	1089	17.100521	PWreassignmentTESTING	CANCELLED
View Details	1093	31.0433	2771626	ASSIGNED TO TECH
View Details	1117	17.100521	47841ATL8	ASSIGNED TO NSP
View Details	1091	31.0433	123456	ASSIGNED TO NSP

This screen allows the user to see all SCRs assigned to the NSP firm with STATUS. It can be sorted by SCR #, Cust #, Call # and STATUS. Sorting by STATUS will give the Admins a quick overview of business in each group. The "View Details" button shows all of the details of the case. The "View History" Button shows all activity on this case including names and dates and status

[Back](#)
[View PDF](#)
[View History](#)

SCR#: 1078

STATUS: PENDING INVOICE

NSP: NSP Training Company

TECHNICIAN: Ross Laver

CUSTOMER INFORMATION		Service Date Requested	8/21/2009
Name:	Altamed Dental Bell	Account#:	17.102394
Address:	6901 1/2 Atlantic Ave	Dispatched By:	PW/Ross.Laver
	Bell, CA 90201	PW Dispatch Sprvr:	Brian Harris
Contact:		Bill Service To:	PracticeWorks
	Phone: 323 562 9222	Service Type:	Installation
Email:		PW Call #	40-41138544

RVG Model:

Gen Model:

CBCT:

Pan Ceph: 9000 C 3D

CR Scanner:

Software:

I/O Camera:

Other:

Software Installed by Local Tech:

Service Requested:

Install 9000C 3D at alternate location

123 4th St.

Ringy Dingy CA. 54321

Changed Date to August

kajkdfljaklj

SERVICES

Date	Procedure
07/30/2009	Other
07/30/2009	Adjustment/Calibration
07/30/2009	Part Repair

SCR History - Microsoft Internet Explorer provided by Kodak Dental Systems

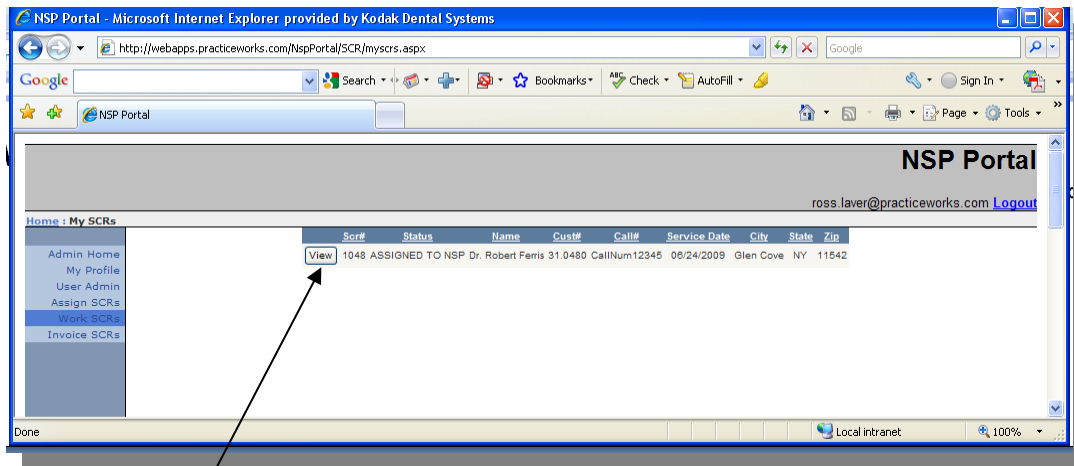
SCR History

Date/Time	User	Action
7/13/2009 3:28:23 PM	PW/Ross.Laver	SCR#:1078 CREATED AND DISPATCHED TO NSP Training Company.
7/15/2009 4:09:07 PM	ROSS.LAVER@PRACTICEWORKS.COM	SCR#:1078 ASSIGNED TO CLAUDIA BINGHAM
7/30/2009 12:16:59 PM	ROSS.LAVER@PRACTICEWORKS.COM	SCR#:1078 REASSIGNED TO TECH - CLAUDIA BINGHAM
7/30/2009 12:17:00 PM	ROSS.LAVER@PRACTICEWORKS.COM	SCR#:1078 ASSIGNED TO TECH - ROSS LAVER
7/30/2009 12:28:02 PM	ROSS.LAVER@PRACTICEWORKS.COM	SCR#:1078 SUBMITTED FOR REVIEW
7/30/2009 12:28:41 PM		SCR#:1078 ACCEPTED - PENDING INVOICE

Work SCR

When the Tech logs in he sees only Work Orders assigned to him. He can;

- Obtain information pertaining to the work to be performed
- Complete the report when the work is finished. Reports should be completed within 5 days



- Click View to see the Work Order / SCR
- The Top of the Screen has all of the information about the client and the work to be done.

The screenshot shows the NSP Portal interface for a specific Work Order (SCR# 1048). The page title is 'NSP Portal'. The main content area is divided into several sections: Customer Details, Dispatch Details, Products to be Installed/Served, and Service Requested. The Customer Details section includes fields for Name (Dr. Robert Ferris), Address1 (15 Village Square), Address2, Email, and Contact. The Dispatch Details section includes fields for Service Date Req (08/24/2009), Dispatch By (PW/Thomas Reed), Dispatch Spvsr (Thomas Reed), Bill Service To (PracticeWorks), Service Type (Other), and PW Ref Call# (CallNum12345). The Products to be Installed/Served section lists various equipment models (RVG Model, Gen Model, CBCT, Pan Ceph, CR Scanner, Software, IOCamera, Other) and a 'Software Installed' section. The Service Requested section contains a text area with the following text: 'I am putting some information here. Old school RVG 5100. The only thing we have to fear is fear itself!!'. The bottom of the page features a navigation bar with links: Services, Serials, Notes, Images, Time & Travel, and RMA'd.

The next Section provides for the input of

- Services:** The actual procedures performed
- Serials:** The serial number(s) for the equipment being serviced.
- Notes:** Information about the case or procedures performed.
- Images:** This is for JPG images for such things as damaged in shipment of scans of receipts. It is not for images taken by radiographic equipment.
- Time and Travel:** Information from the tech to be used by NSP accounting in creating the Invoice.

- f. **RMA'd**: Shows parts that are being dispatched and the tracking number. This operates in real time so if parts are dispatched after the work order has been created it will update automatically.

This Section will be addressed in the section "Completing Service Report"

Invoice SCRs

This process will allow those with ACCOUNTING rights to create the invoice online providing the following advantages

- The Client Demographics are imported from our database so that reference numbers will always be in sync.
- A field allows the NSP to indicate the Invoice Number generated in the NSPs accounting system
- Information provided by the Technician is imported directly into the invoice
- A uniform Invoicing System will speed PW processing.

This Section will be addressed in the section "Completing Invoice"

NSP Portal
ross.lavin@practiceworks.com [Logout](#)

Home > Invoice SCRs > Invoice

Invoice SCRs

[Admin Home](#)
[My Profile](#)
[User Admin](#)
[Assign SCRs](#)
[Work SCRs](#)
[Invoice SCRs](#)

INTERNAL INVOICE NUMBER (for NSP Purposes ONLY)
Internal Invoice Number: 1068

Customer Details
SCR#: 1068
Name: Testing Kit
Address1: 5247 Cherry Hill Ln
Address2: 7th Door On Left
Email: kit.homan@hudsonadental.com
Contact: kay sarines

INVOICE#: PW1068
Account: 17.100521
City: Powder Springs
State: GA
Phone: 770 857 1488
Contact: kay sarines

Dispatch Details
Service Date Req: 07/01/2009
Dispatch By: PW/Thomas Reed
Dispatch Spwr: Thomas Reed
Bill Service To: Practiceworks
Service Type: Warranty
PW Ref Call#: 273895ATLS

Time & Travel

Date	Type	Description	hrs
07/01/09	Airfare	AIRFARE - Total Invoice: \$289.65	0.00
07/01/09	Lodging	LODGING - 3 nights AT \$79.95 per night including tax.	0.00

Travel & Miscellaneous

Time in transit billable @ \$55/hr	Hours: 0.00	\$0.00
Air Travel	Total Invoice:	289.65
Lodging	Per Night w/ Tax:	79.95
Miscellaneous	Total Misc Exp:	0.00
Total Travel:		\$529.60

Actual Services Provided by NSP

Date	Procedures	Description	hrs	Part Info
07/01/09	Part Replacement	Part Replacement of small cable on back of RVG 0000 unit	2.50	
07/01/09	Other	Training User how to use software.	1.50	

Billing Detail

Warranty Service @ \$115/hr	Hours: 0.00	\$0.00
Installation Flat Rate	Flat Rate:	0.00
	Site Survey:	0.00
	Standard Fee:	0.00
Total Billing:		\$529.60

Sales Tax: 0.00
Invoice Total: \$529.50

Calculate

Save Data

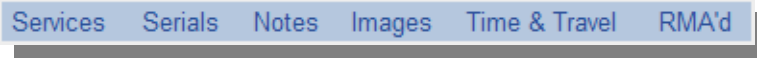
Preview

Completing Service Report

Areas of the Report are accessed through the Tabs

IMPORTANT NOTES:

- click the “SAVE” button when completing each screen
- The “Issue Completely Resolved” appears at the bottom of all of the following screens. If not checked you will be required to leave a note describe the steps being taken in order to resolve the issue.



Services
Serials
Notes
Images
Time & Travel
RMA'd
Issue Completely Resolved

Services:

Each of the possible services is shown in a List of Procedures

- Each Procedure will cause the window to change. Service Hours, Date and short Description of what was done is required on all necessary windows.
- Click the “SAVE” button after each window is completed.
- Part Replacement:
 - Special note should be taken in the Part Replacement Window as there is an additional box for the part.

- If the part you replaced is not in the list of parts, identify it at the beginning of Description Field and leave the Box blank

- The “Resolved” check Box should only be checked if that part resolved the problem when installed.

Serials:

Select the appropriate item from the list and enter the Serial Number for that item in the field to the left. Serial numbers are required for any serialized component that was serviced such as a Ceph or Sensor in addition to the Product Serial Number.

Notes:

Use this area to provide any information pertinent to this Service Call. This might include:

- Equipment damaged in shipping. (Be sure to attach photos using the “Images” tab)
- Parts not on site as scheduled.
- Missing Parts or Software Version Issues.
- Problems accessing or working with PW Support
- Problems encountered on site that caused excessive time, i.e.;
 - Patients scheduled
 - Power not available

Images:

- Attach images of photos or PDF files that may be necessary. This section will not accommodate image formats created by KDI or KOI software. Those images should be stored in KDI or KOI with a patient First and Last Name of NSP.
- Possible uses for this area:
 - Photos
 - Irregularities in area compared to Site Survey
 - Shipping Damage
 - Failed Parts found opening machine
 - Etc.
 - Expenses
 - Receipts; Airline, Hotel, miscellaneous.
- Supported file formats
 - JPG, Tiff, Gif, etc
 - PDF (NOTE: Document formats such as .doc, .xls, .ppt are not supported)

Time & Travel:

The technician can provide information that will help the NSP Accountant to complete the Invoice. Information provided by the technician in these screens will be captured in the Invoice. The Invoicing utility will allow the Accountant to adjust these as necessary.

Software installed

Services Serials Notes Images Time & Travel RMA'd

TIME & TRAVEL

Type [v] Date 9/8/2009 [...]

Airfare
Lodging
Miscellaneous
Time in Transit
Time On Site

Type [v]

Airfare
Lodging
Miscellaneous
Time in Transit
Time On Site

☒ Issue completely resolved?

Preview SCR for Submittal

RMA'd: (Parts Dispatched)

Real Time information identifies:

1. Parts that have been dispatched
2. Linked Tracking Numbers (Links are provided for UPS and Cavalier)

Preparing the Report for Submittal

When all of the pertinent parts of the report have been completed the technician can preview the report prior to submitting it using the button at the bottom of the Screen.

☐ Issue completely resolved?

Preview SCR for Submittal

☐ Issue completely resolved?
If issue is NOT completely resolved, please provide a reason below.

Preview SCR for Submittal

If “Issue completely resolved?” is Unchecked, then the following message will appear.

In that case, the technician must indicate what steps will be taken to resolve the problem.

The Preview allows the technician to review everything about to be sent about the case. If anything about the report needs to be changed or added, there is a “Back” button which will take the technician back to the form. There is also an option to view the form as PDF or JPEG..

Back View PDF View JPEG

SCR#1061

CUSTOMER INFORMATION				Service Date Requested: 6/30/2009 12:00:00 AM	
Name:	Dr. Scott Posen	Account#:	37 100165	Dispatched By:	PW/Thomas Reed
Address:	679 Kennedy Rd.			PW Dispatch Spvr:	Thomas Reed
	Scarborough, ON M1X 2B5			Bill Service To:	Sales
Contact:		Phone:	416 261 7269	Service Type:	Non-Warranty
Email:				PW Dispatch Spvr:	

RVD Model:	RVD 6105	Service Requested:	
Gen Model:		RMA tracking info:	
CBCT:			
Pan Cap:			
CR Scanner:			
Software:			
I/O Camera:			
Other:			
Software Installed by Local Tech:			

SERVICES						
Date	Procedure	Description	Part#	Disposition	Resolved	Hrs
07/05/2009	Part Replacement	Replaced Tube Head	K2200 Tubehead	Packed/Left at Front Desk for Call Tag	<input type="checkbox"/>	1.50
07/05/2009	Adjustment/Calibration	Calibrated using KVP			<input type="checkbox"/>	2.00

SERIALS	
Product	Serial #
Generator Prod Ser#	12345

PHOTOS
No Photo Records to show

TIME & TRAVEL				
Date	Type	Description	Hrs	Billable
07/05/2009	Time On Site	TIME ON SITE - 2 hours total on site	2.00	<input type="checkbox"/>

Notes:
 Images taken are still grainy. PW will send Sensor
 ISSUE NOT RESOLVED -- User:ross.levier@practiceworks.com Date: 7/5/2009 9:29:18 PM
 REASON: PW replacing Sensor

Submit SCR to PracticeWorks for Review

Done Local intranet 100%

When the technician is satisfied, clicking the button “Submit SCR to PracticeWorks for Review” will send it to PW Support for review. If accepted it will be forwarded to the NSPs Accountant for preparation of the Invoice.

Completing Invoice

Key Points:

- Internal Invoice Number at the top of the form allows the NSP to enter the Invoice number generated by his / her accounting system. Note that it is not necessary to submit the invoice

from your accounting system. The invoice generated by the NSP Portal system is all that is needed.

- Information entered by the technician in the Time and Travel section is also shown on the invoice and is calculated. If necessary these values can be changed on the Invoice.
- Once the invoice is completed, Click the button labeled “Preview” at the bottom of the window. After completing the Preview. At the top of the Preview Page the Button labeled “Submit Invoice for Review” will send the invoice for Review. If accepted it will be forwarded to Datrose for payment.

As the Work Order proceeds through the process emails are sent to the appropriate user letting them know that the ownership of the Work Order has moved to them.