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.

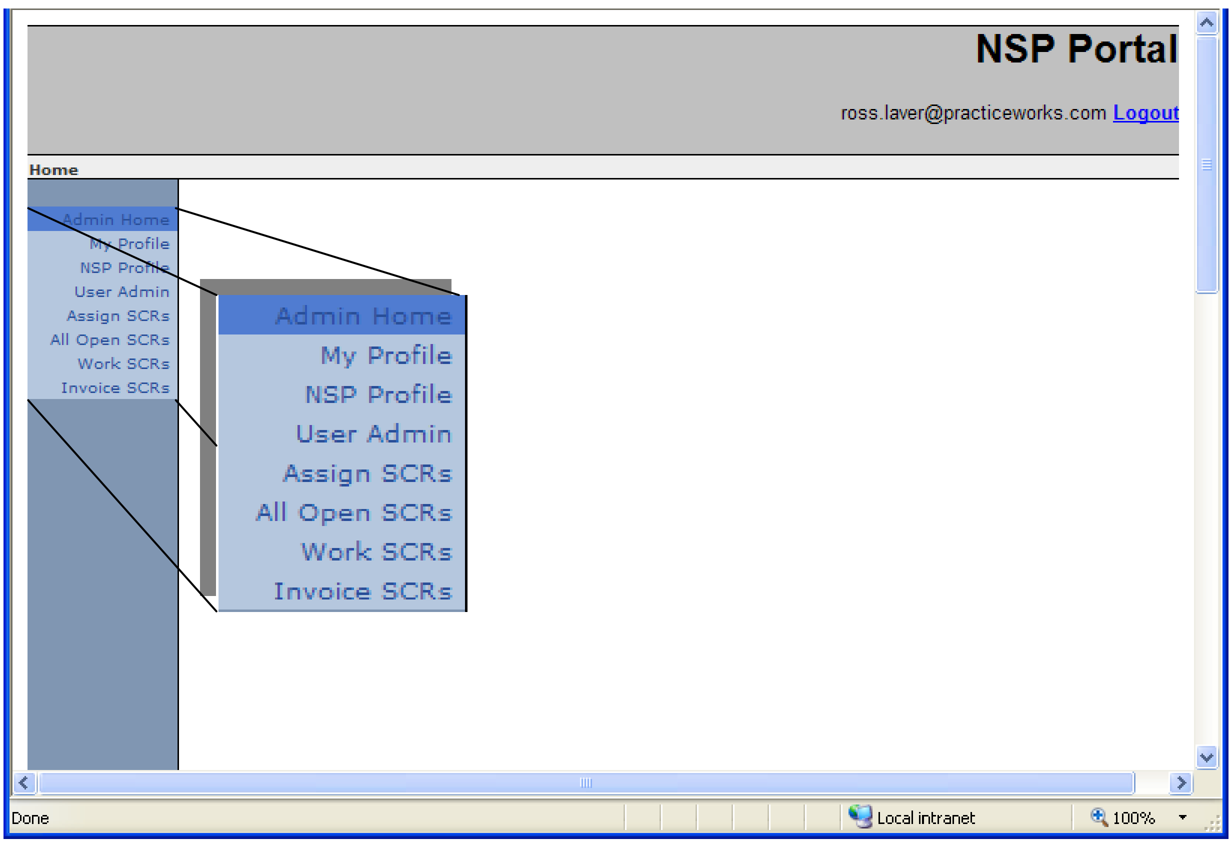
Login: <Administrators Email Address>

Password: <Will be communicated in email invitation>

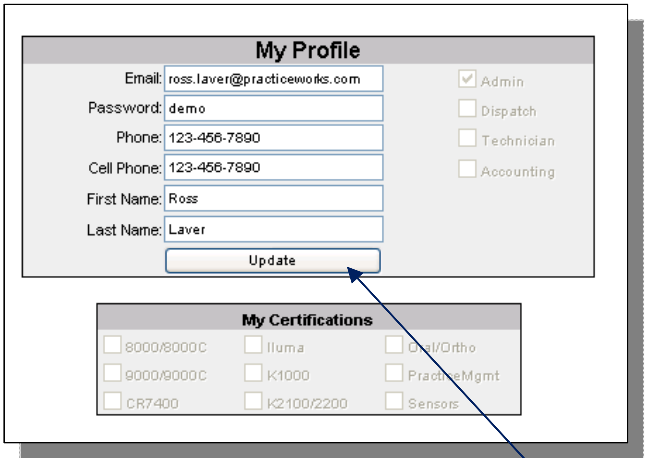
Administrative Switchboard

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.

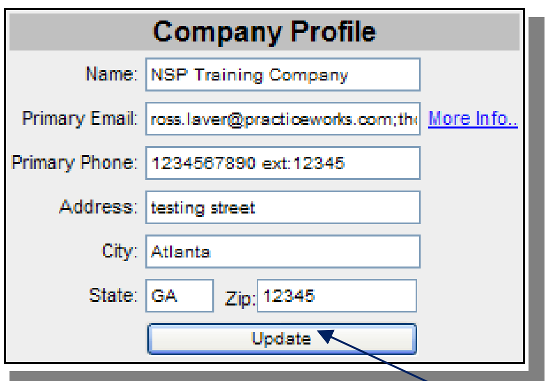


My Profile



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.

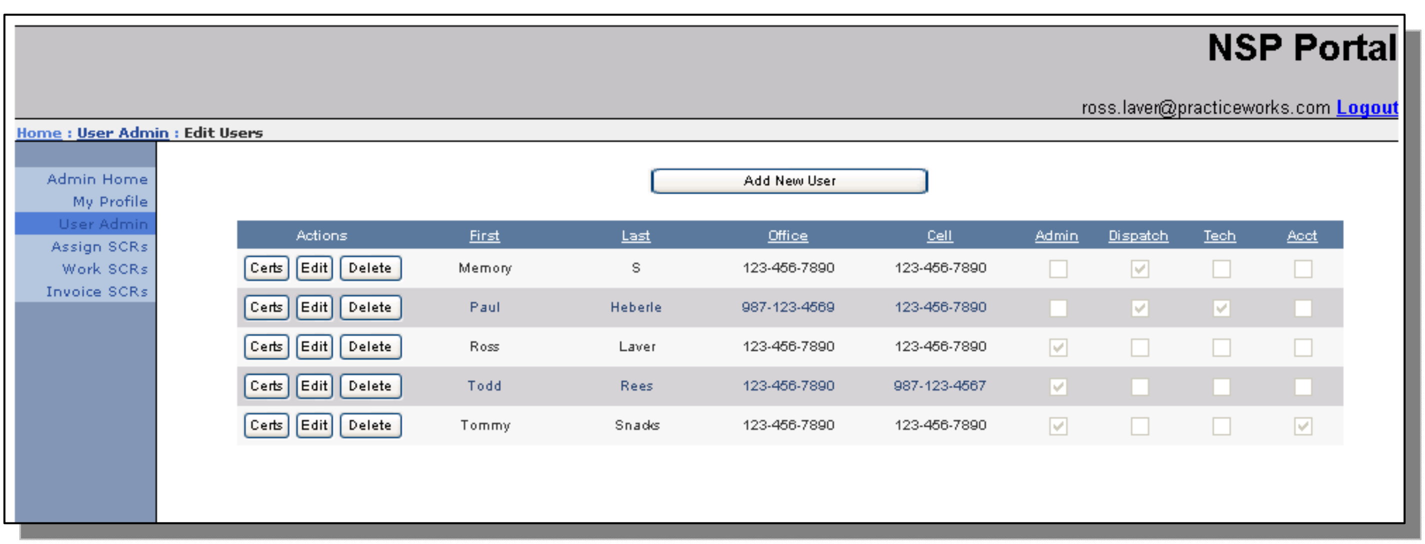
NSP Profile



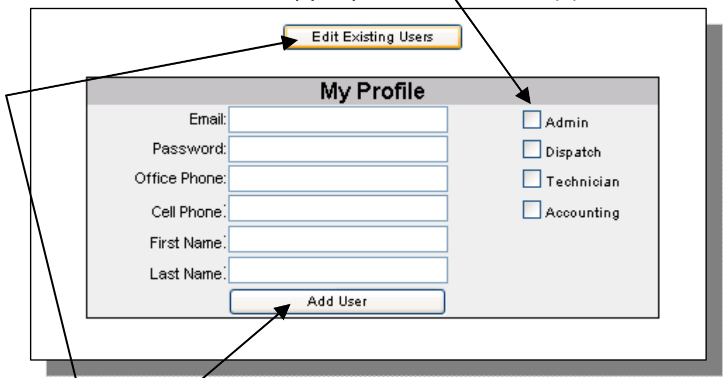
Make Changes to the profile and then Click “Update” to save the changes.

User Admin

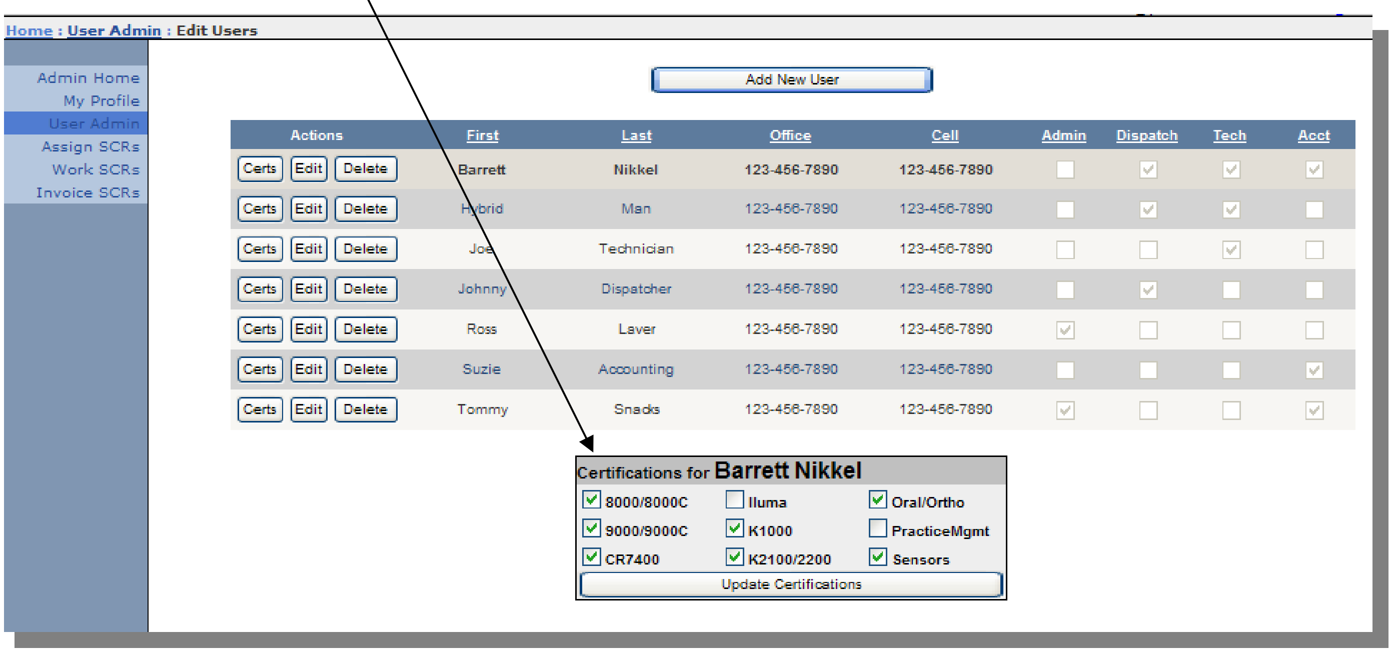
User Admin allows Administrators to



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

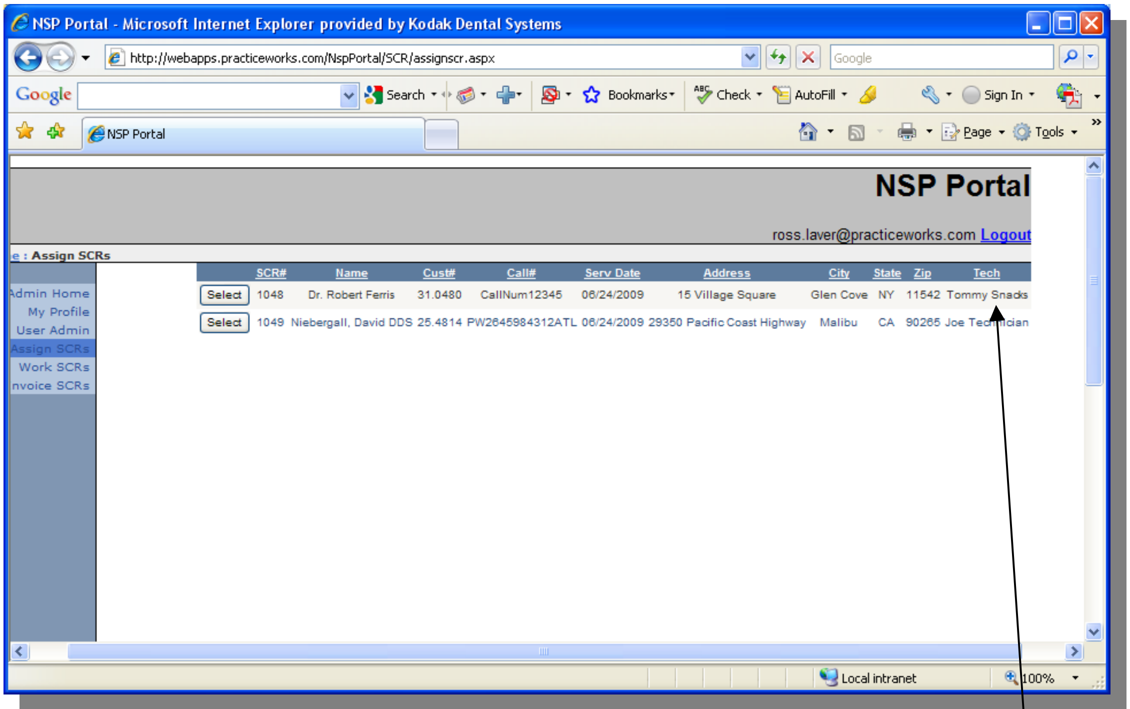


    c. Click “Add User” when done
    d. Click “Edit Existing Users” to return to the User Admin Screen
2. Existing Users
    a. Delete – Deletes the User
    b. Edit – Use this to change the name and/or phone numbers users Rights
    c. Certs - Update Certifications

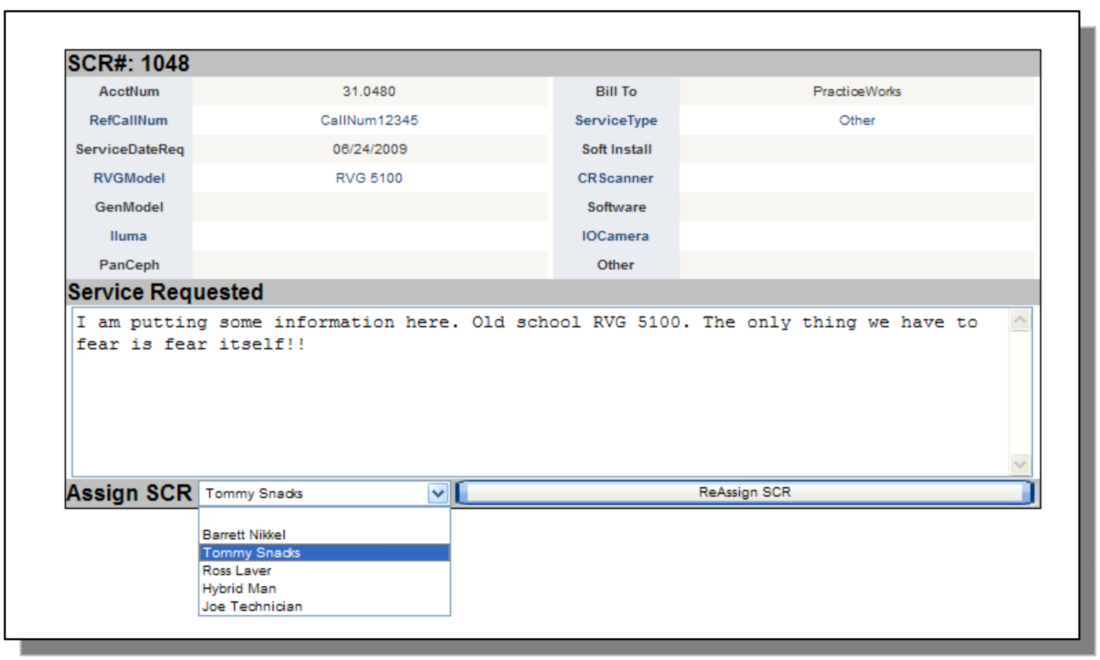


Assigning SCRs

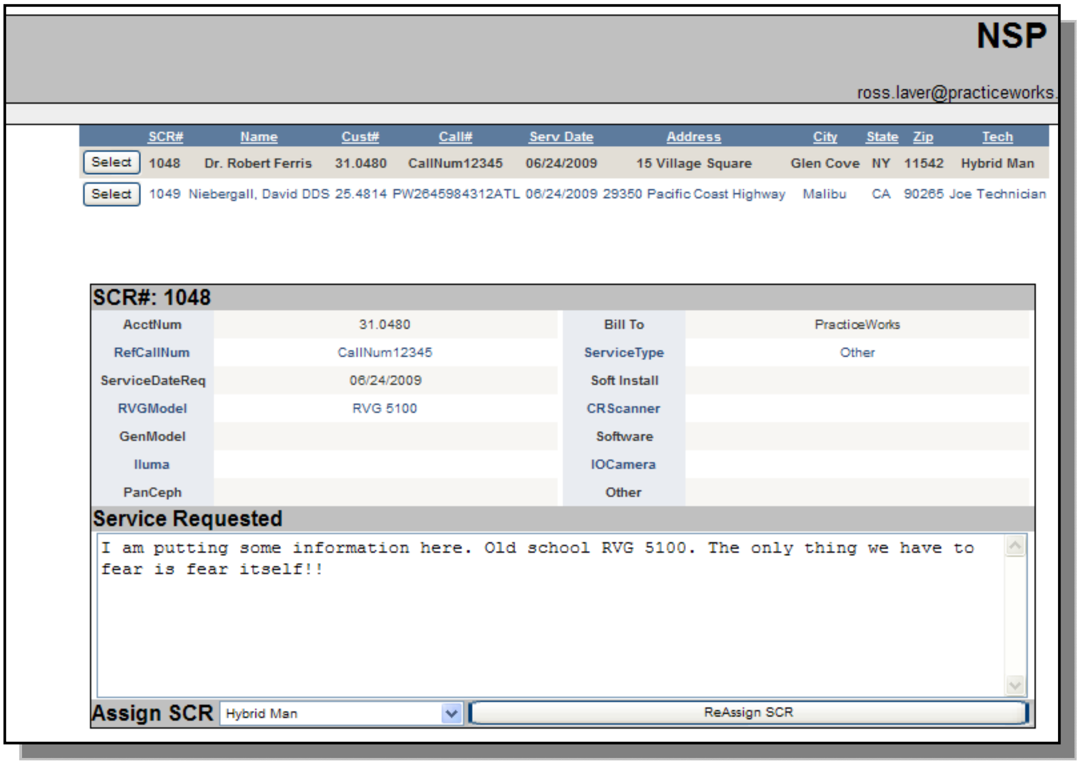
Allows the Assigning or ReAssigning Work



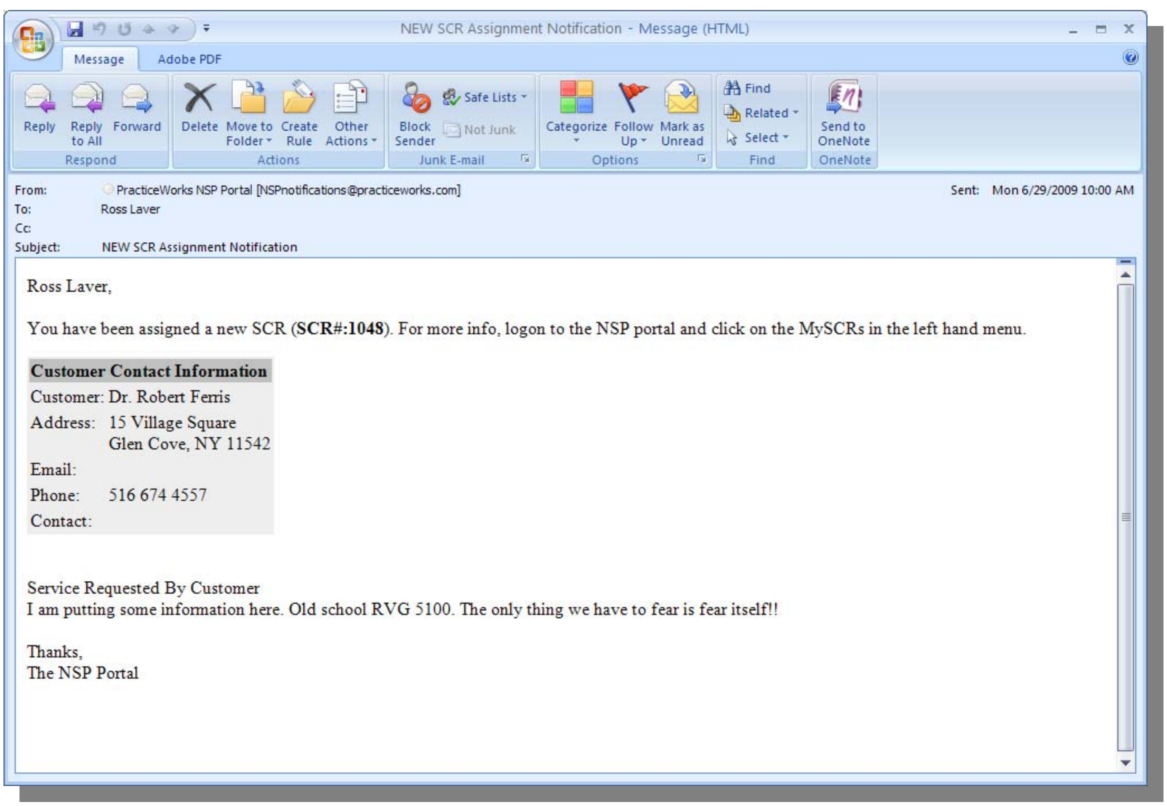
1. Note that in the screen above the first item is assigned to “Tommy Snacks”
2. Click “Select” next to the case you wish to Assign or ReAssign. The Assign Dialogue Box will open
3. Click the Drop Down next to Assign SCR and the names of those with “Tech” rights will be displayed.



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.



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.



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

RVG Model:		Service Requested:
Gen Model:		Install 9000C 3D at alternate location 123 4th St. Ringy Dingy CA. 54321 Changed Date to August kajkdfkljaklj
CBCT:		
Pan Ceph:	9000 C 3D	
CR Scanner:		
Software:		
I/O Camera:		
Other:		
Software Installed by Local Tech:		

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

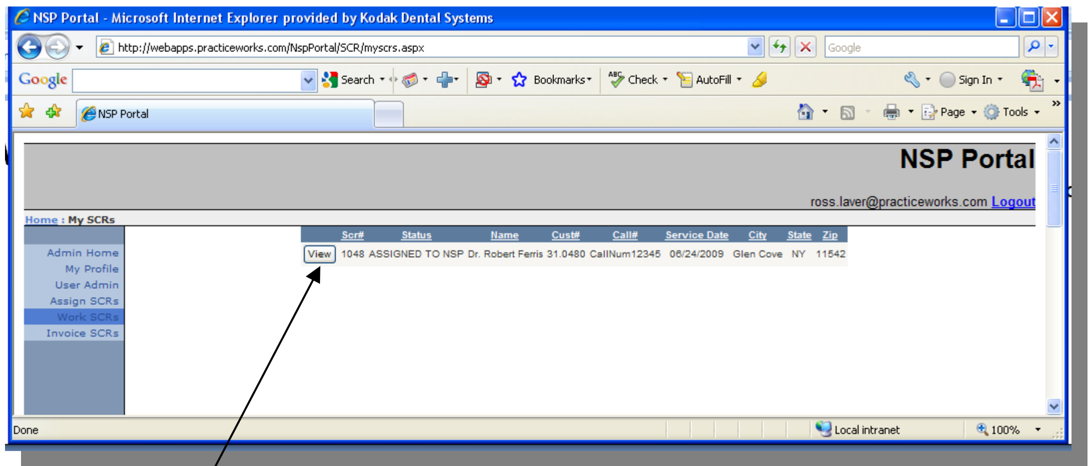
SCR History

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

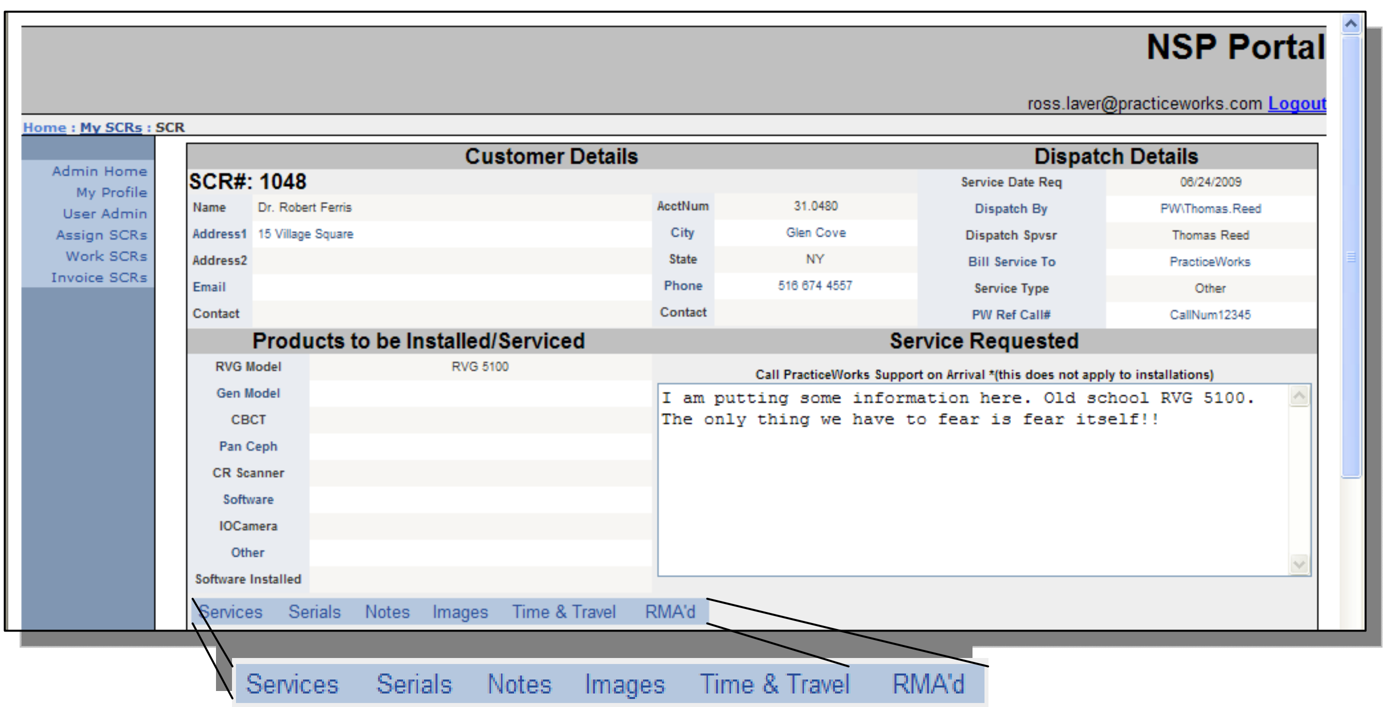
Work SCRs

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 next Section provides for the input of

a. **Services**: The actual procedures performed
b. **Serials**: The serial number(s) for the equipment being serviced.
c. **Notes**: Information about the case or procedures performed.
d. **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.
e. **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.

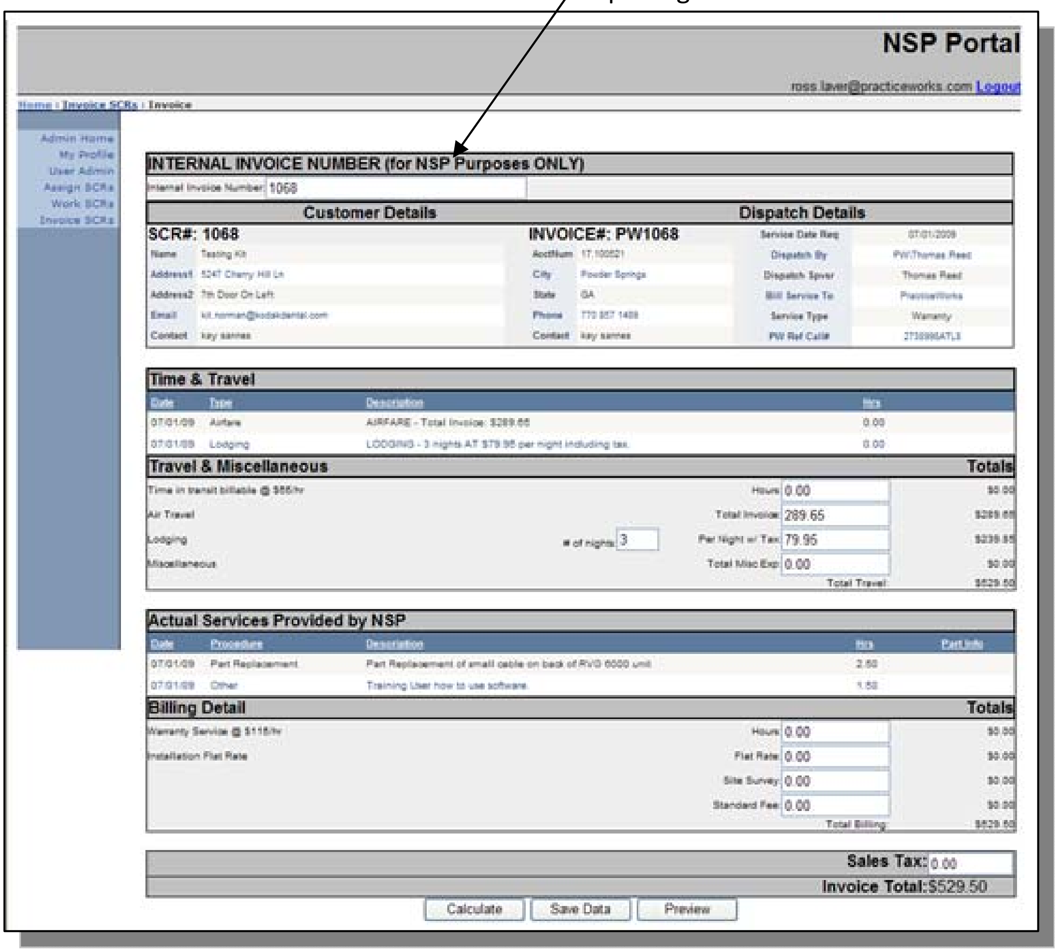
This Section will be addressed in the section "Completing Service Report"

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"



Completing Service Report

Areas of the Report are accessed through the Tabs

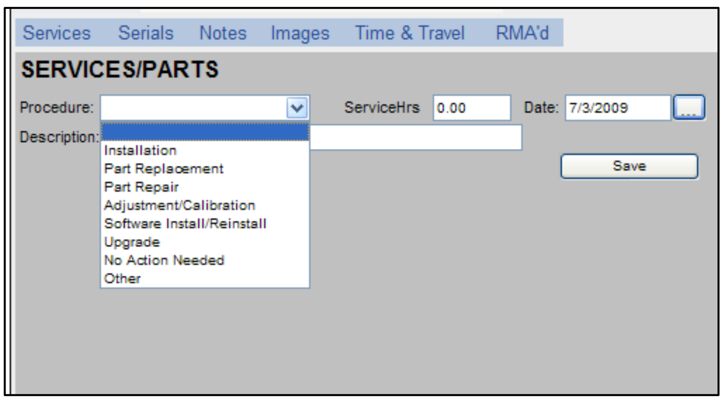
IMPORTANT NOTES:

- 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.

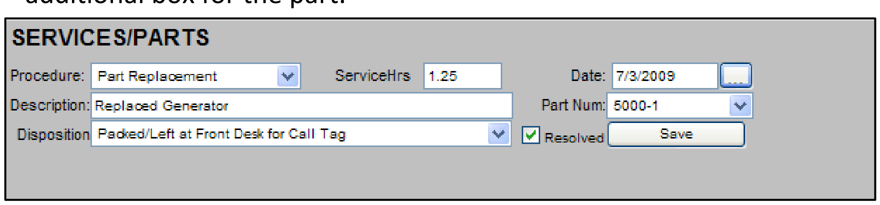
Services
Serials
Notes
Images
Time & Travel
RMA’d
Issue Completely Resolved

Services:

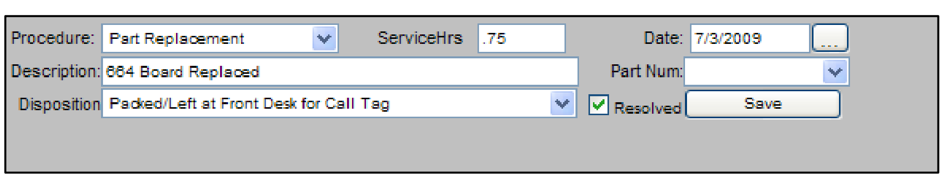
Each of the possible services is shown in a List of Procedures



- 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.



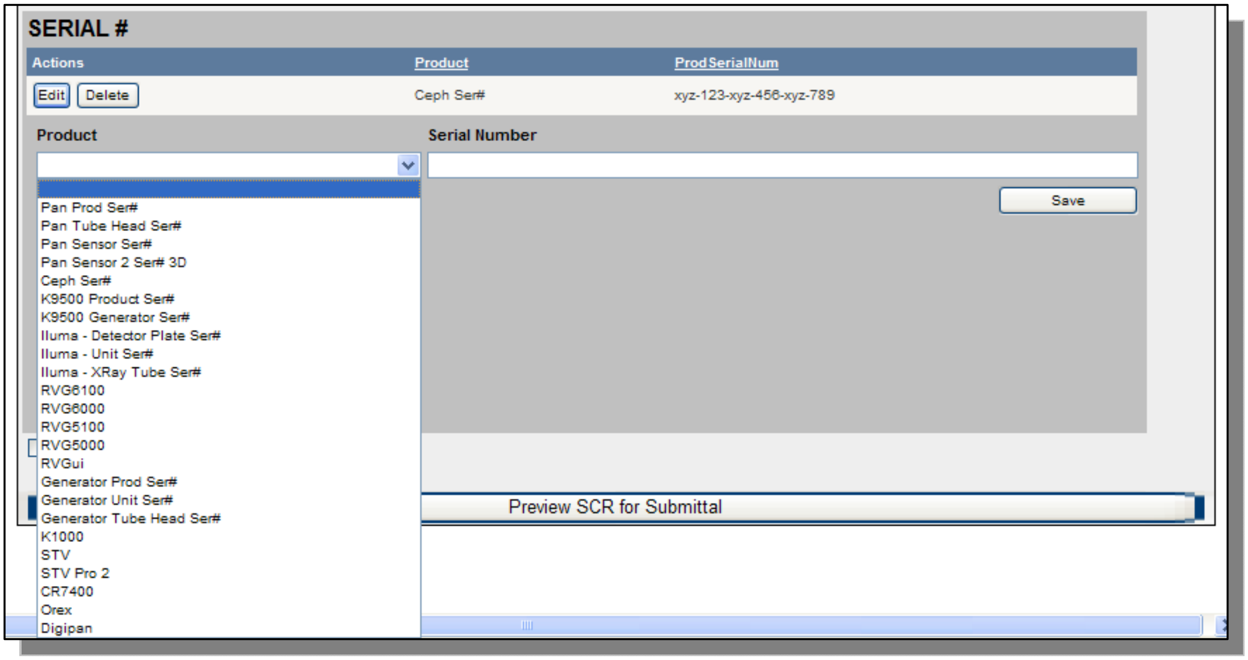
  - If the part you replaced is not in the list of parts, identify it at the beginning of Description Field and leave the Box blank



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

Serials:

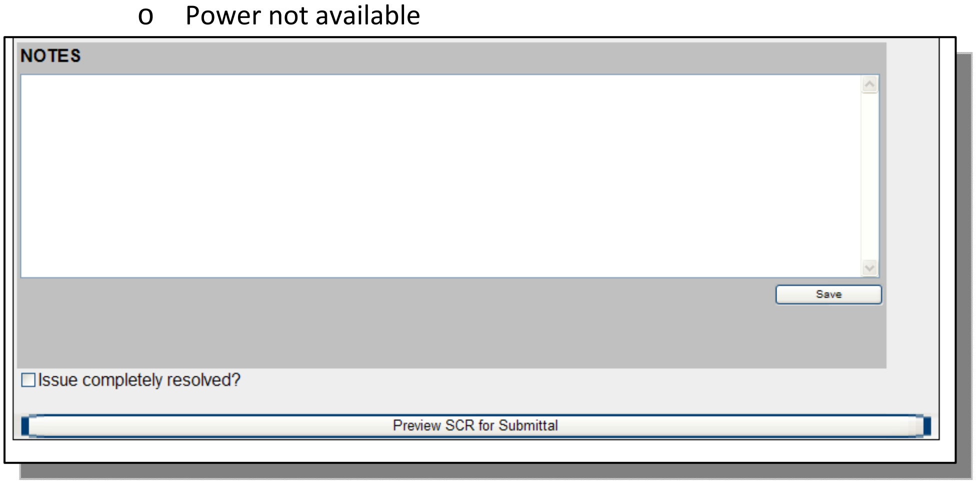
Select the appropriate item from the list and enter the Serial Number for that item in the field to the left. Serial numbers are required for any serialized component that was serviced such as a Ceph or Sensor in addition to the Product Serial Number.



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

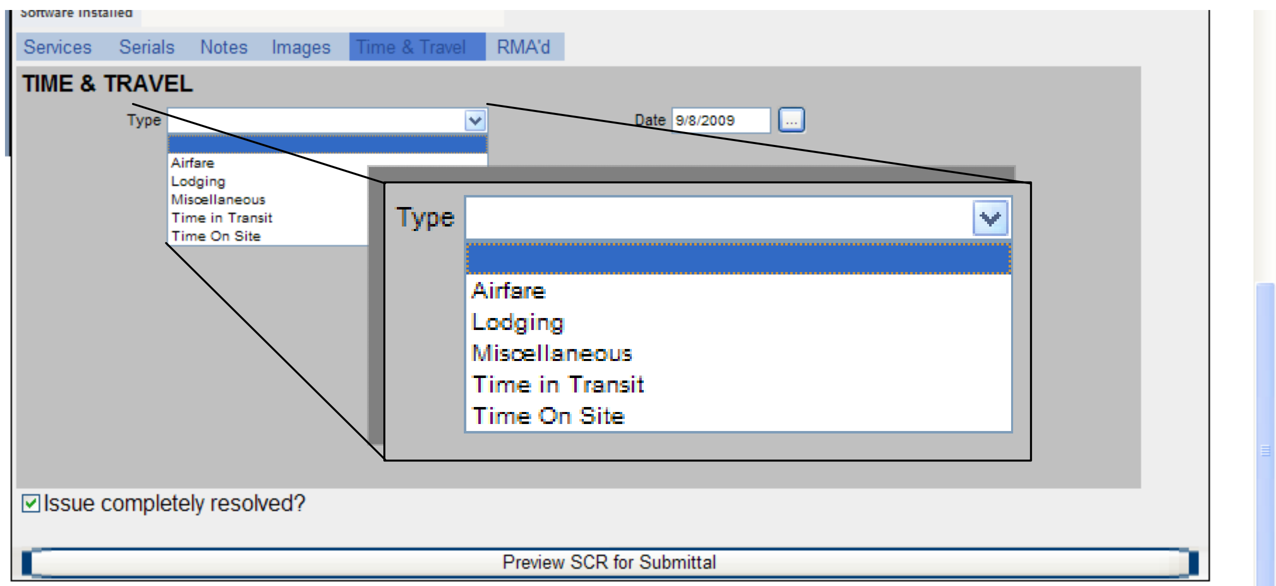


Images:

- 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.



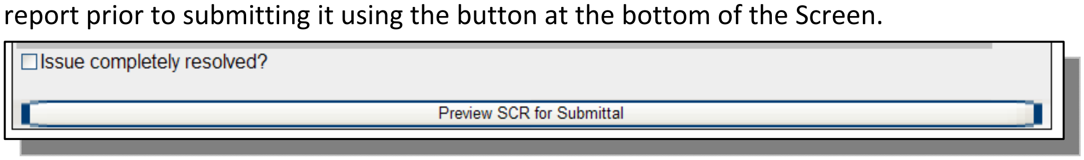
RMA'd: (Parts Dispatched)

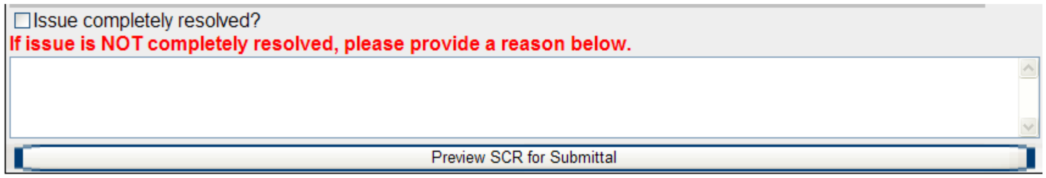
<u>Real Time</u> information identifies:

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.

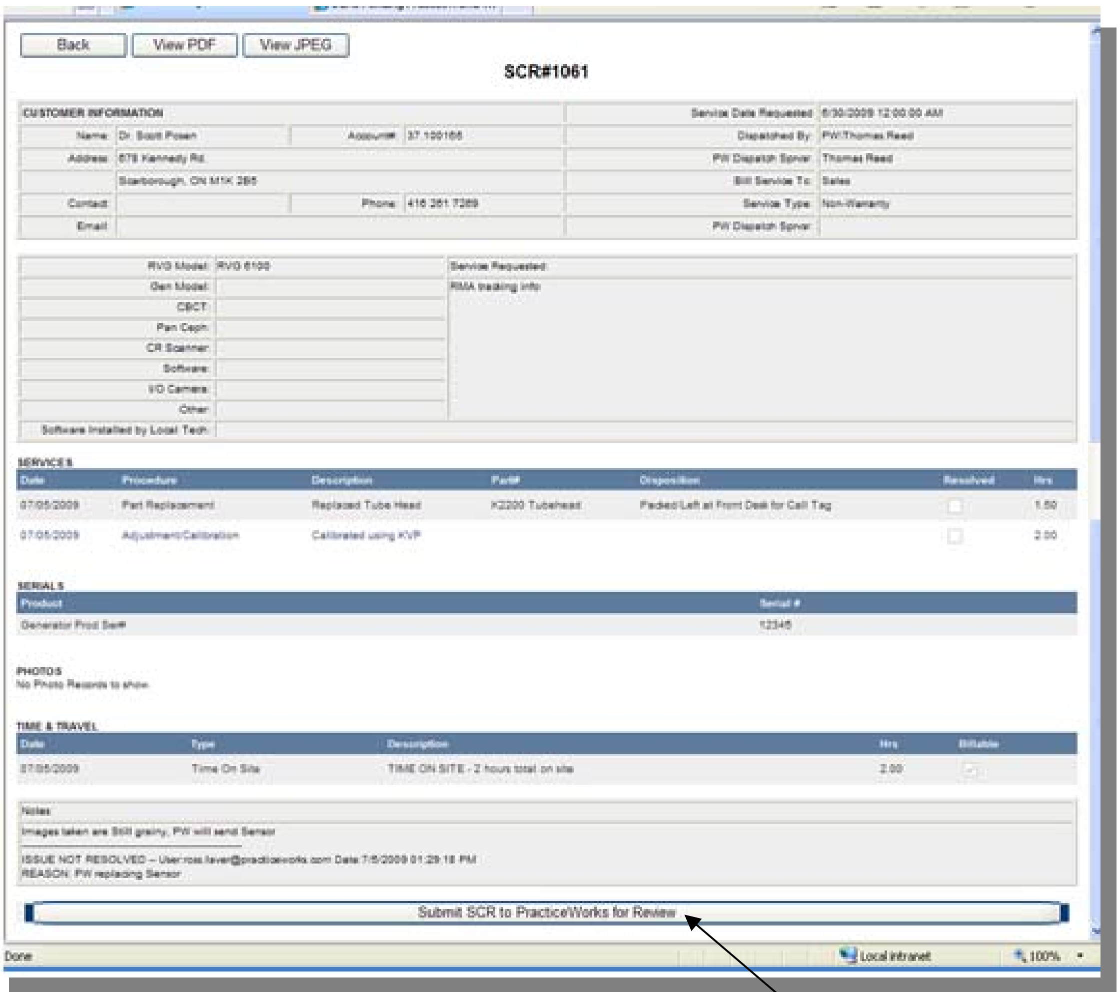




If “Issue completely resolved?” is UNchecked, then the following message will appear.

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..



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.