viive

Viive 5.2

INSTALLATION AND SETUP GUIDE

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Contents

Overview and New Features

Viive is a dental practice management system designed for Mac. Viive helps you manage a wide range of practice information, including patient information and clinical records, scheduling, and production analysis.

Using the setup options and preferences, you can customize Viive to suit your personal preferences and meet the needs of your practice. Once you set up Viive, you can begin to enter patient information and schedule appointments using the Schedule window.

This guide introduces you to the new features in Viive 5.2 and provides instructions on installing and setting up the software. For more information on using the software, refer to the Viive System Requirements, Viive Quick Start Guide, and Viive Help.

New Features and Enhancements

Viive 5.2 includes the following new features and enhancements:

Chart

- The ADA-CDT Dental Codes have been updated to include the changes in the 2016 CDT Update.

Insurance

- You can now easily purge or inactivate all insurance plans with no patient attached or selected plans.
- When you inactivate an insurance plan, you can now easily replace the inactivated plan with another plan for subscribers who were using the inactivated plan.
- You can now reactivate an inactive insurance plan.
- When you are setting up insurance plans, a new **Show Inactive** check box lets you display insurance plans that have been inactivated.
- When you set up insurance plans, you can click a new **Show Subscribers** button to view a list of subscribers on the selected insurance plan. This button appears in two places: when you inactivate an insurance plan or when you double-click an insurance plan in the Insurance Group Plan window to view the plan details.

Reports

- The Recare Report has been changed to the Recare Management Report. Some of the options with this report have changed.
- The Treatment Plan Management Report was moved to the **Management Reports** menu.
- The Office Journal includes a new button you can click to create a Journal Notes Report.

Scheduling

- Recare appointments are now easier to schedule. You now have the option to schedule recare during patient checkout.
- A new Treatment Plan button has been added to the Schedule window.

Miscellaneous

- When creating patient letters or using the Journal tab, the data field appearance now changes depending on its state (for example, if the mouse is hovering over the field, if it has not been edited, if it is currently being edited, or if it already contains a response).

- Your office phone number now appears on printed receipts (if you include it in your office information).

- The Area Code default setting in Preferences - General was removed.

- When a patient makes a credit card payment during checkout, the payment is not processed now until you click **Record Checkout**.

System Requirements

In order to run Viive, you must have an Apple Macintosh computer running OS X Mavericks (10.9), OS X Yosemite (10.10), or OS X El Capitan (10.11) and meet the Mac's system requirements (visit viive.com/support.aspx).

Installing the Viive Software

The Viive installation software is delivered on a USB flash drive. Install the Viive Server software before you install the Viive Client software.

To install the Viive Server software

1. Insert the Viive flash drive into the USB port on the server computer.

2. Double-click the Viive 5.2 (...).dmg file to run the installation.

3. Double-click the **Viive Server Admin** icon.

   The message "'Viive Server Admin' is an application downloaded from the Internet. Are you sure you want to open it?" appears.

4. Click **Open**.

5. At the **Welcome**... screen, click **Continue**.

6. At the **Software License Agreement** screen, click **Continue**, and then click **Agree**.

7. At the **Select a Destination** screen, select the disk where you want to install Viive (if more than one location is shown), and then click **Continue**.

8. At the **Custom Install** screen, verify the Viive components that you want to install, and then click **Continue**.

9. Click **Install** to begin installing the software.

   When the software finishes installing, the Viive Server Admin is copied to your Applications folder (for future use) and the Viive Server Admin screen appears.

10. Click the **Backups** tab and make any desired changes to your backup options. (It is recommended that you back up your database every night, which is the default setting.)

11. Close the Viive Server Admin screen.

After the Viive server software is installed on your Viive server, you need to install the Viive client software on each computer that will run the software and connect to the database on the Viive server.

To install the Viive client software on other computers

1. Insert the Viive flash drive into the USB port on the client computer.

2. Double-click the Viive 5.2 (...).dmg file to open it.

3. Drag the Viive icon to the Applications folder icon.

You can now start Viive from the Applications folder.

Setting up Viive

Before you begin using Viive to enter patient information and schedule appointments, you need to provide some basic information about your practice and providers. You also need to set up your preferences.

Important: Some settings and preferences, such as the **Time Unit Size** in **Preferences: Schedule Details**, can't be changed after you begin entering patient and schedule information, so you'll want to properly set up Viive for your practice before you begin entering patient data.

This guide provides information on setting up the required options and preferences but does not cover all setup options and preferences. For more information on other setup options and using Viive, refer to the Viive Help.

Setting up office information

One of the first things you need to set up is your practice's office information.

1. From the **Reference** menu, click **Office**.

2. Provide your office information in the fields provided:

    • **Office Name** - The name of your dental practice.

    • **Address** - The address of your practice.

    • **City, State, Zip Code, Phone, Fax, Email, Web** - The city, state, ZIP Code, and phone numbers of your practice.

    • **State License** - The state license number issued to your practice.

    • **Social Security** - The provider's Social Security number used on income tax filings.

    • **Federal TIN/Tax ID** - The Federal Taxpayer Identification Number issued to your practice/provider by the Social Security Administration or the IRS.

    • **NPI** - The unique 10-digit National Provider Identifier number issued to the provider by the Centers for Medicare and Medicaid Services (CMS).

3. Click **OK**.

Setting up providers and staff

Viive considers each individual who provides billable treatment to patients a provider. Other employees in your practice are staff. When you first begin to use Viive, you need to set up the providers and staff in your office.

1. From the **Reference** menu, click **Providers & Staff**.

2. To add a new provider or staff, click .

3. Specify the provider information in the designated fields:
   - **Name** - The first and last name and middle initial of the provider.
   - **Title** - The provider's professional title, such as DDS or RDH.
   - **Color** - Designates a color to associate with the provider in the Scheduling window.
   - **Active** - If selected, designates the provider as an active provider.
   - **Is Primary** - If selected, designates the provider as one of the practice's primary providers.
   - **Code** - The Provider ID number.
   - **Address** - The mailing address of the provider.
   - **City, State, Zip** - The city, state, and ZIP Code of the provider.
   - **Specialty** - Select the provider's area of dental specialty.
   - **State License** - The state license number issued to your practice.
   - **Tax ID** - Either the provider's Social Security number or TIN.
   - **Social Security** - The provider's Social Security number used on income tax filings.
   - **Federal TIN** - The Federal Taxpayer Identification Number issued to your practice/provider by the Social Security Administration or the IRS.
   - **DEA** - The number assigned to the provider by the Drug Enforcement Administration.
   - **ADA #** - The number assigned to the provider by the American Dental Association.
   - **NPI** - The unique 10-digit National Provider Identifier number issued to the provider by the Centers for Medicare and Medicaid Services (CMS).
   - **EClaim Provider #** - The number assigned to the provider when the provider signs up for the electronic claims service.
   - **CS #** - The Controlled Substance number. (This field is needed to comply with Washington D.C. prescription requirements.)
   - **Additional ID #** - Any additional ID number that the provider may need to keep track of.
4. Click **OK**.

Setting up operatories

When you first begin to use Viive, you need to set up the operatories that your practice uses and that appear on the schedule.

1. From the **Reference** menu, click **Operatories**.
2. To add a new operatory, click ⊞.
3. Specify the operatory information in the designated fields:
   - **Short Name** - An abbreviated name for the operatory.
   - **Daily goal** - A daily production goal.
   - **Name** - The full name, description, or location of the operatory.
   - **Provider** - The provider assigned to this operatory. (You can select this from the list after you have set up your providers.)
   - **Office** - The name of the office. (You can select this from the list after you have set up your office.)
4. Click **OK**.

Note: To delete an operatory, select the operatory and press Delete. You cannot delete an operatory where appointments have been scheduled.

Setting up the office schedule

You can set up multiple schedule rules that define when your office is open for business. For example, you can set up a rule for Monday through Thursday hours, and a separate rule for Friday hours. You can set up one rule for lunch hours on Monday, Wednesday, and Friday, and a different rule for lunch hours on Tuesday and Thursday. You can set up a rule to close on certain holidays every year, such as the 4th of July, Christmas, and New Year's Day.

1. From the **Reference** menu, click **Office Schedule**.

2. Select which days of the week your office will be open.

3. Click **U.S. Holidays**, select the holidays when your office will be closed, and click **OK**.

4. If you have recurring days/hours when the office will be closed (such as the last Friday of every month in the afternoon), click **Change Multiple Days**, and then do the following:

   • To close the office for the entire day, click **Close Office**.

   • To close the office for part of the day, specify the hours using the **Open**, **Lunch**, and **Close** fields.

   • Specify a **Background** and **Text** color for the closure type.

   • Type a **Reason** for this closure.

   • Specify a **Frequency** for this closure.

   • Specify the **Start Date** and **End Date** for this recurring closure.

   • If you want existing holiday closures to override this recurring closure (for example, to prevent the office schedule from showing the office as open in the morning of the last Friday of the month when Christmas falls on that day), select **Skip Holidays that are Closed**.

   • If you want other schedule changes to override this recurring closure, select **Skip days with Schedule Changes**.

   • When finished, click **OK**.

5. If you have other days/hours when the office will be closed, click that date on the calendar, and then do the following:

   • To close the office for the entire day, click **Close Office**.

   • To close the office for part of the day, specify the hours using the **Open**, **Lunch**, and **Close** fields.

   • Specify a **Background** and **Text** color for the closure type.

   • Type a **Reason** for this closure.

   • When finished, click **OK**.

6. Click **OK**.

Setting up fee schedules

When you create a new fee schedule, Viive adds all the default procedure codes and fees to that fee schedule to provide a complete fee schedule as a starting point. From there, you can customize the new fee schedule using the **Procedure Codes** dialog box, just as you did when you set up procedure codes and treatment area options. Just double-click the new fee schedule and change any fees for that fee schedule.

1. From the **Reference** menu, click **Fee Schedules**.

2. To add a new fee schedule, click in the bottom left corner.

3. In the **Schedule Name** field, type a name for the new fee schedule.

4. Press Enter.

5. When Viive has finished saving the new fee schedule, click **OK**.

6. From the **Reference** menu, click **Procedure Codes**.

7. From the **Procedure Category** list, select the category where you want to change a procedure code fee.

8. Double-click the procedure code whose fee you want to change.

9. Double-click the fee schedule you want to change.

10. Make the needed fee schedule changes for this procedure code and click **Save**.

11. Click **OK**.

Setting up preferences

In the **Preferences** dialog box, you can set up your preferences while you work in Viive. Some of these should be set up before you begin to schedule appointments and save data in Viive.

1. From the **Viive** menu, click **Preferences**.

2. Click the General icon and configure the following options:

    • **City** - Specifies a default city to use for new patients.

    • **State** - Specifies a default state to use for new patients.

    • **Zip Code** - Specifies a default ZIP Code to use for new patients.

    • **Area Code** - Specifies a default area code to use for new patients.

    • **Default Fee Schedule** - Specifies a default fee schedule to use for new patients.

    • **Default Provider** - Specifies a default provider to use for new patients.

3. Click the Schedule icon and configure the following options:

    • **Time Unit Size** - Specifies the size of the smallest division of time units on the schedule. The default is 10 minutes.

        Note: Once any appointment is made, **Time Unit Size** can no longer be changed.

    • **Days to show in week** - Specifies the maximum number of days your office is open per week.

    • **Week starts on** - Specifies which day of the week your schedule will start on.

4. When finished, click **OK**.

For information on other preferences and settings, see the Viive Help.

Connecting with DEXIS

Viive connects to DEXIS using the DEXIS user name and password that you created when you installed DEXIS.

To connect Viive with DEXIS

1. From the **Viive** menu, point to **Preferences**, and then click **Integrations**.

2. In the **User Name** and **Password** fields, type your DEXIS user name and password.

3. Click **Connect to DEXIS** (do not press Enter).

After DEXIS is installed, you can view the DEXIS integration on the Chart tab in Viive.