

R4+ Workflow Changes in Version 9.1.1

This 6-page handout provides information on enhancements and workflow changes in regard to NHS Treatment Planning and FP17 Claim Submission when you upgrade your R4+ software to Version 9.1.1.

This handout is intended for England and Wales R4+ users, in the roles of Clinician.

Workflow Changes for NHS England Only

Role: Clinician

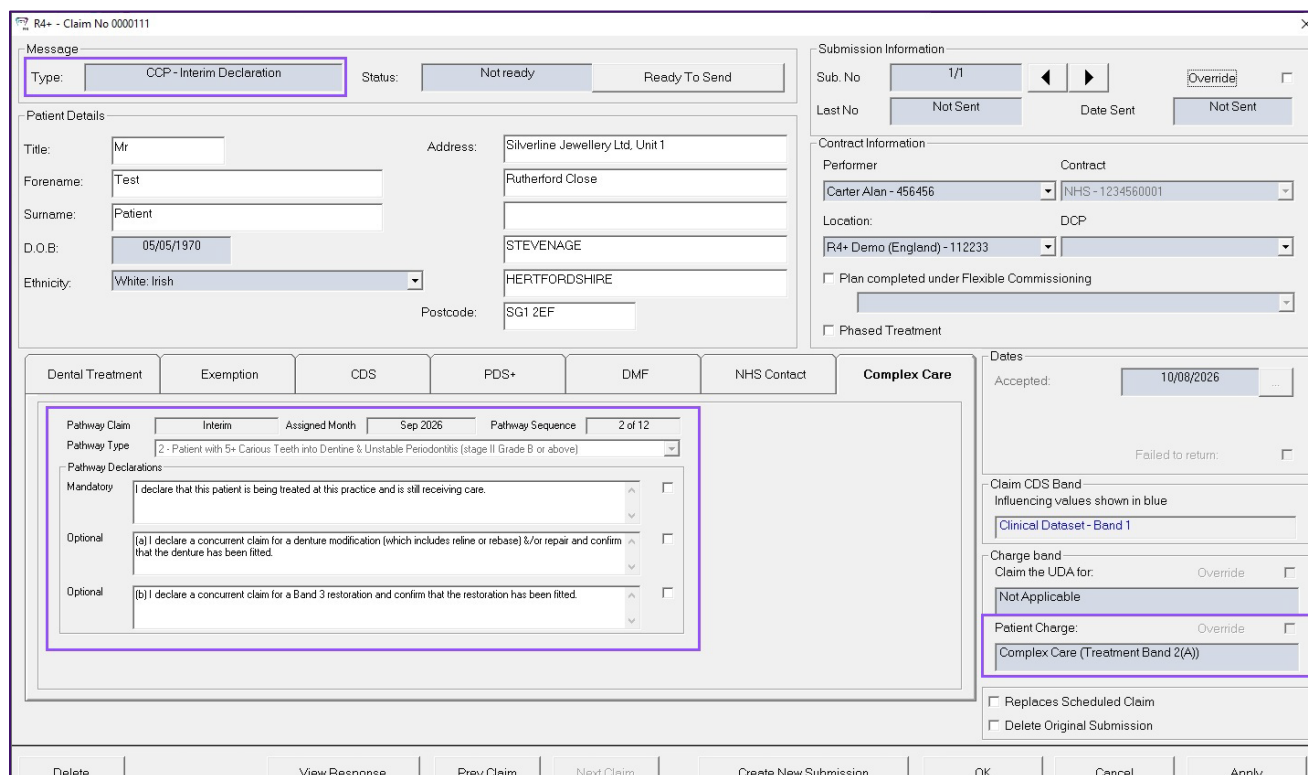
Complex Care Pathways: Interim Declaration FP17 Claim Forms

There are further enhancements to the Complex Care Pathway (CCP) workflow included in this release of R4+, including Interim CCP claim forms and some minor changes to the EDI management screen.

Note: Full functionality for **Final Declaration** CCP claims will be added in an upcoming release of R4+.

When users upgrade R4+ from version 9.1.0 to 9.1.1, all Sign Up Complex Care Pathway claims that are Settled automatically generate the next Interim Declaration claims and set them as Not Ready. The Interim Declaration claims are created automatically in sequence as the Pathway progresses, upon settlement of a CCP claim (excluding the Final Declaration claim).

The Interim Pathway claim Type is displayed as **CCP- Interim Declaration**.





Each Pathway has a Sign Up Claim, Interim claims, and a Final Declaration claim:

- **Pathway Type 1 & 3:**
 - Total Claim submissions: 6
 - The Sign Up claim is Submission 1
 - Interim Declarations are Submissions 2 to 5
 - The Final Declaration claim is Submission 6 (determined by Select Pathway Type and prior linked claims to the Treatment Plan)
- **Pathway Type 2:**
 - Total Claim submissions: 12
 - The Sign Up claim is Submission 1
 - Interim Declarations are Submissions 2 to 11
 - The Final Declaration claim is Submission 12 (determined by Select Pathway Type and prior linked claims to the Treatment Plan)

Each interim declaration is assigned a target month based on its sequence number (i.e., how many calendar months after the Date of Acceptance month). The target **Assigned Month** for each interim declaration is visible on the claim within the Complex Care tab.

The screenshot shows a software interface for a 'Pathway Claim'. At the top, there are tabs for 'Pathway Claim', 'Interim', 'Assigned Month', and 'Pathway Sequence'. The 'Assigned Month' tab is selected, showing 'Sep 2026'. The 'Pathway Sequence' tab shows '2 of 12'. Below these tabs, the 'Pathway Type' is set to '2 - Patient with 5+ Carious Teeth into Dentine & Unstable Periodontitis (stage II Grade B or above)'. Under 'Pathway Declarations', there are three sections: 'Mandatory' with a declaration 'I declare that this patient is being treated at this practice and is still receiving care.', and two 'Optional' sections: '(a) I declare a concurrent claim for a denture modification (which includes relines or rebases) &/or repair and confirm that the denture has been fitted.' and '(b) I declare a concurrent claim for a Band 3 restoration and confirm that the restoration has been fitted.' Each declaration has a checkbox to its right.

See the following example of a complete sequence for Complex Care Pathway 1, with a Date of Acceptance in July 2026 (i.e., 6-month pathway duration):

Submission	Claim	Interim Declaration Assigned Month
Submission 1	Sign Up	July 2026
Submission 2	1 st interim declaration	August 2026
Submission 3	2 nd interim declaration	September 2026
Submission 4	3 rd interim declaration	October 2026
Submission 5	4 th interim declaration	November 2026
Submission 6	Final Declaration, Completion	December 2026

The Charge Band UDA Value is displayed as Complex Care (Treatment Band 2). The Pathway Type is Read-Only as a Patient cannot be swapped between Pathways once Sign Up has been completed.

New Declarations are presented when Pathway claims have reach Interim Status. The interim mandatory declaration is the same for all three Pathway types: "I declare that this patient is being treated at this practice and is still receiving care."

There are also two optional Declarations that can be selected:

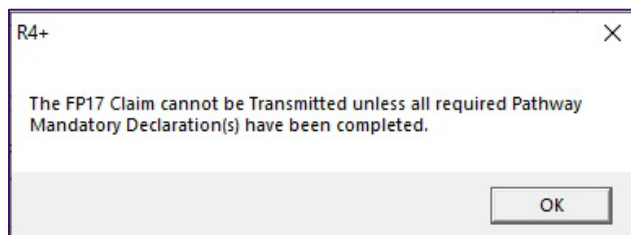
- (a) I declare a concurrent claim for a denture modification (which includes reline or rebase) &/or repair and confirm that the denture has been fitted.
- (b) I declare a concurrent claim for a Band 3 restoration and confirm that the restoration has been fitted.

Two new buttons are available at the bottom of the claim form, **Prev Claim** and **Next Claim**. These buttons provide you with the ability to sift through the linked claims (i.e., claims that form the overall Pathway) in numerical order. The Next Claim option is disabled when there are no newer claims available, and the Prev Claim option is disabled when viewing the Sign Up claim.

The Contract Unit Value received for each pathway submission is stored against that submission (i.e., a value per submission). This differs from a standard claim where a single Contract Unit Value is held and overwritten. This allows for each submission's value to remain individually reconcilable to money later.

Note: The contract value is set to the same value as the previous claim within the Complex Care Pathway and cannot be edited. The Contract Performer defaults to the same performer as the previous claim within the CCP, but this option can be edited as needed.

If the User attempts to select **Ready to Send** for the claim while the Pathway Type and/or Mandatory Declaration is not selected, the action is prevented and the following message is displayed:



The Interim claims do not show a Date of Completion; a completion date is transmitted only on Suspended, Cannot Be Completed, or Completed pathway declarations.

Note:

- All treatment recorded values stored on the claim in the CDS tab are excluded from Interim Claims.
- Failed to Returns are not an option for Complex Care Pathways claims and this option is disabled.

Concurrent Claims

A warning message is displayed when a user creates a second (and onwards) CCP concurrent claim to inform you that a concurrent course of treatment is already active or previously completed during the patient's Complex Care Pathway. This warning only applies for NHS courses, so it excludes courses that are Ortho, Urgent, or Private.

While the NHSBSA will accept further claims in this situation, you will not receive any UDA payment if the allowed 12 UDAs has already been paid for concurrent treatment. Also, if the Patient has



previously had a band 3 (CCP) charge for concurrent band 3 treatment alongside a Complex Care Pathway, any new charge produced should be credited out or refunded as the Patient is not liable for any further concurrent charges.

EDI Management Updates

You can use the EDI Management screen and filter to specific Complex Care Pathway claims. You can select **CCP – Signup**, **CCP – Interim Declaration**, or **CCP – Final Declaration** from the Type filter drop-down list.

Criteria

Type: Other

Dentist: Prior Approval

Patient's Name: Orthodontic

Acceptance From: CCP-Signup

Completion Date: CCP-Interim Declaration

No.: 0 ☒ Higher ☐ Lower

For example, you might filter the list to show only CCP Sign Up claims that have a Settled status.

R4+ - Claims

File

Status

☐ All ☐ Rejected ☐ Not Ready ☐ Adjusted ☐ Ready ☒ Settled ☐ Sent ☐ Deleted

Include

☒ Totals ☐ All dentists ☐ Deleted dentists ☒ All patients ☒ All Acceptances ☒ All Completions

Criteria

Type: CCP-Signup

Dentist: AC Carter Alan

Patient's Name: ...

Acceptance From: ... to ...

Completion Date: ...

No.: 0 ☒ Higher ☐ Lower

Search Close

View Responses

Send Claims

Claim Details Report

Details

Claim	Forename	Surname	Initials	Accepted	Type	Patient	DPB	Total	Ortho	UDA/UOA
000110	Test	Patient	AC	0	10/08/2026 CCP - Sign up	0.00	0.00	0.00	☐	3

Set the criteria as needed, and then click **Search** to display the applicable claims.

NHS Activity Report Updates

The NHS Activity Report has been updated and now has a set of columns for Complex Care Pathways. The columns include Courses and UDAs for Complex Care Pathway 1, Complex Care Pathway 2, and Complex Care Pathway 3, combined into a single pair of figures.

The UDA Count in the Complex Care Pathways column group is based on the cumulative sum of all submission responses against each Treatment Plan with a Pathway, also taking into account the Pathway Type recorded in the first Sign Up claim submission.

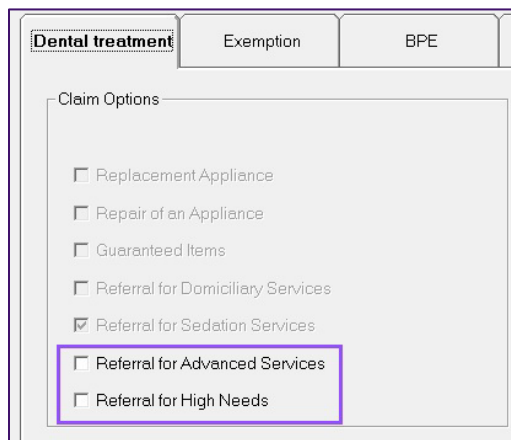
Workflow Changes for NHS Wales Only

Role: Clinician

Treatment on Referral for Advanced Services or High Needs

There are two new options in the Dental treatment > Claim Options Frame for Wales:

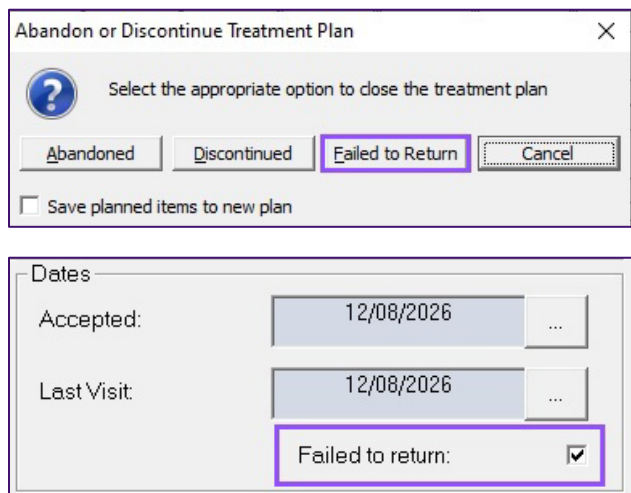
- Referral for Advanced Services
- Referral for High Needs



The Treatment on Referral treatment plan item has been removed from the Claim Options. Additionally, the claim option "Domiciliary Services" has been renamed to "Referral for Domiciliary Services", and the claim option "Sedation Services" has been renamed to "Referral for Sedation Services".

Failed to Return Claims

For incomplete treatment, when the Treatment Plan has been closed early and the "Failed to Return" option is selected, the Failed to return option is selected on the claim form.



Simple/Extended Caries & Crown/Bridge/Inlay/Onlay & Veneer Care Package Tooth Counts Overlapping RCT Positions

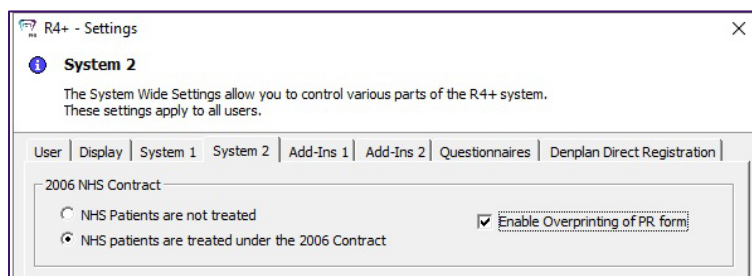
The Simple/Extended Caries and Crown/Bridge/Inlay/Onlay & Veneer Care Packages consider if any RCT-related treatment is proposed or completed on the same tooth position in the same Treatment Plan. When this is the case, they are excluded from the Package count, as the RCT covers all treatments under these packages on the same tooth.

Workflow Changes for NHS England & Wales

Role: Clinician

Full Print and Overprint Support for PR Form 11 and PR Form 13

Full Print and Overprint are now supported for PR Form 11 (NHS England) and PR Form 13 (NHS Wales). To enable Overprinting, select **Enable Overprinting of PR form** in the System 2 Settings (Edit > Settings > System 2).



From the Patient Record > Schemes tab, you can select Print PR Form to print the form.



Using these settings generates a pre-populated PR Form to the default Printer.

Additional Upcoming R4+ Changes

There will be more Handouts made available in the future as new Versions of the R4+ software are released to cover updates for additional required functionality changes for the new NHS Contract.

For example, some of the future required updates involve:

- Management and Reporting KPIs for the New ACV Contract Metrics
- A new Role for Oral Health Practitioner for Nurse Applied Fluoride Varnish
- Additional Complex Care Pathway Enhancements

For more information, see the [R4+ Online Help](#).