



**CEIS Office Management System
2010 New Features Guide**

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Login

User login is now required. If you did not login into the system previously a default Admin employee will be added during the conversion process. This employee record does not have a password so you will not have to enter a password to login.

You can change the name of the Admin employee and add a password by going to Maintenance|Clinic|Employees. Additional employees and passwords can be added as well.

Switchboard

The main switchboard has been redesigned for the 2010 version. There is now only one button per area which opens the associated find form. New items like patients or invoices can then be created by clicking the new button on the find form.

Notifications

Occasionally a Notifications tab will appear on the switchboard containing one or more messages. This tab will stay visible until all the messages have been read and deleted.

Reminders

The current reminders list has been integrated into the switchboard. The reminder list can be sorted by four different fields by clicking the sort button directly to the right of the associated field.

Tasks

A new task or to-do list has been integrated into the switchboard. A task consists of a due date, task description, priority, status and optionally the employee the task is assigned to. New tasks can be added by clicking the new button, edited by clicking the quick link button (...) or deleted by clicking the red X. Tasks will no longer appear on the switchboard once they have been marked as complete or are deleted.

The task priority and status list can be edited by going to Maintenance|Clinic|Tasks.

Note Pad

The note pad is a place to record your temporary notes, personal reminders, thoughts, etc. The notes are recorded on a per employee basis and are saved until you delete them. In networked multi-computer offices your notes will be available on any PC you sign in to.

Schedule

Room View

All appointments can be assigned to a room and practitioner. The schedule can then be viewed by room or practitioner. All schedule forms contain dropdown of practitioners and available rooms. Simply select one or the other to view the scheduled appointments.

To add or edit the available rooms go to Maintenance|Clinic|Schedule|Rooms. Rooms are made up of a code and a name. For example Code: 1 Name: Room 1

When scheduling appointments entering the room number can be setup to be mandatory or optional by going to Maintenance|Clinic|Clinic Setup|Misc Options – Require Room #.

New Patients

Just like new patients can be added directly from the schedule input window, new patients can be added from the waiting list as well. Simply click the quick link button (...) beside a blank patient dropdown to open a blank new patient form.

Email

Email Appointment Reminder Message

Email appointment reminder messages can be customized like a form letter template. The message template can be accessed by going to Maintenance|Clinic|Email Setup and clicking the 'App Reminder Msg' button. The appointment reminder message will open in the form letter editor. All of the usual merge codes are available plus Schedule.Date, Schedule.Date.Long and Schedule.Time.

Automatic Email Reminders

Email appointment reminders can be automatically sent on startup. To enable this feature set the 'Auto Email Reminders' option to 'On' in the Misc Options form. (Maintenance|Clinic|Clinic Setup – Misc Options) Next set the 'Remind Days' field to the number of days in advance you would like reminders sent.

For appointments to be automatically emailed the following criteria must be met:

- Appointment date must be between the current date and the current date plus the 'Remind Days' value.
- The scheduled patient must have an email address entered
- The appointment must be set to the default status which is black on the schedule form.

After the messages have been sent auto emailed appointments will appear red on the schedule form and a record of the reminder email will be stored in sent items.

Email Schedules as PDF

Simply click the email button located below each schedule to send the associated schedule as an attached pdf file. The default pdf message text in the body of the message can be edited by going to Maintenance|Clinic|Email Setup and clicking the 'PDF Email Msg' button.

Signatures

Rich text based email signatures can be entered for the clinic, practitioners and employees. To setup a:

Clinic Signature - go to Maintenance|Clinic|Email Setup and click the 'Clinic Email Sig' button.

Practitioner Signature - open a practitioner record using the practitioner find form (Maintenance|Clinic|Practitioner) and click on the 'Email Signature Setup' button.

Employee Signature – open an employee record using the employee find form (Maintenance|Clinic|Employees|Employee – Find) and click on the 'Sig' button.

To add a signature to an email simply select the appropriate signature from the 'Email Signature' dropdown box and click the append button.

Sent Items

A record of all sent email messages is tracked in the sent items section. To view the list go to Functions|Email|Sent Items.

Patient

Mailing Labels

Mailing labels and envelopes can be printed directly from the 'Letter' tab on the patient record.

Discount

Separate patient discounts can now be entered by product type in the patient record. Simply enter the appropriate discount for products, services or combinations.

Reports

Export as PDF

Export all reports to a pdf file by simply clicking the 'Export to PDF' button located on each report form. The pdf files will be exported to the 'Report Export Directory' which can be entered/edited by going to Maintenance|Clinic|Clinic Setup.

Summary Reports

The summary report now has additional clinic statistics total patients, new patients, initial visits, total visits, unique patient visits, total invoices, avg sales per invoice and more.

Both the summary report and Transaction list can now be filtered by patient.

Sales Summary

Three new monthly sales summary reports display monthly sales totals by product, product type or product class. These reports can be accessed by going to Reports|Invoices|Sales.

Sales Comparison

The new Sales Comparison line graph displays monthly sales totals for the selected year and compares them to two previous years. This chart can be accessed by going to Reports|Invoice|Sales.

Expense Reports

Accounts Payable

The AP report displays expenses owing categorized by expense supplier and type with dated balances. The report can optionally be filtered by expense supplier, type and practitioner. Access this report by going to Reports|Expenses|Accounts Payable

Expense Payments

Go to Reports|Expenses|Expense Payments to access new expense payment list and expense payment summary reports. The reports can optionally be filtered by expense date, payment date, expense supplier, type and practitioner.

Inventory Reconciliation

Inventory Count

The inventory count feature allows you to set your on hand levels to the result of an inventory count. Counts can be entered for one supplier, one product class, one single product or all the products in your system. Once you have entered your product counts a inventory reconciliation record is created and can be applied as usual. Go to Functions|Inventory Reconciliation|Inventory Count – New to enter your inventory count.

Exam Charting

Treatment Plan

A new note field is available to enter a treatment plan for each patient. The treatment plan can be accessed by clicking the ‘TP’ button directly on the exam form.

Exam History

A patient’s exam history can now be viewed directly from the exam form by clicking the ‘EH’ button.

Email Documents

Email templates, scanned docs, images and diagrams as attachments directly from the exam form by click the email button beside the associated file.

Security

Exam charting security can now be setup on a clinic wide basis or on a practitioner basis.

Clinic Level Security

Clinic level security allows you to enter two passwords that are used by the entire clinic and are setup in Maintenance|Clinic|Passwords. If a value is entered in for 'Exam Charting Form Open' that password will be required before an exam record can be opened and viewed. If a value is entered in for 'Exam Charting Form Lock' that password will be required to be able to unlock exam records, which guards against unauthorized users making changes.

Practitioner Level Security

Additionally, separate passwords can be setup on a per practitioner basis, so each practitioner has their own unique passwords and can only view their own exam records. This type of security must be setup in 4 steps.

1. An administrator will have to be chosen. This person's employee records must be of type 'administrator' and they will setup the users and passwords.
2. An employee record must be setup for each practitioner and each employee that uses the system. To do this go to Maintenance|Clinic|Employees and enter at least a first name, last name and password. This employee record and password will be required to log into the system.
3. An administrator must login and go to Maintenance|Clinic|Practitioner and select the employee record that relates to each practitioner.

An administrator must click the 'Charting Security Setup' button on each practitioner record and select the appropriate security level (1. None, 2. Edit Security 3. Read/Edit Security) and enter the appropriate passwords.

Default Descriptions

Commonly used template, diagram, image and scanned document descriptions can be pre-entered and then simply selected from a dropdown box to save time and improve naming consistency. Go to Maintenance|Clinic|Charting Setup to edit any of the four description lists.