



**CEIS Office Management System
2013 New Features Guide**

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Backup

The built in backup system has changed to allow additional files to be backed up and to allow the backups to be compressed or zipped. Additionally, the software can be backed up while in use. To set backup options go to Maintenance|System|Backup|Setup.

- Backup Options: Data Only (Only the CEIS database files)
 Data and Exam Files (database files and all charting documents)
 Additional Folders (any additional folders specified)
- Zip Data Files: If yes the backed up files will be archived in the .zip format, in order to save disc space.
- Remove Old Files: If yes the backup procedure will create a current backup and then remove any previous backup files. As a result only the most recent backup will be kept.
- Backup Folder: Denotes the folder where the backup files will be stored. This can be an external drive, a flash memory stick, another computer on the network, etc.
- Online Backup: This service is disabled by default. When enabled your data and files can be backed up to a Competitive Edge, cloud based server. This is a monthly fee based service, based on the amount of storage required. To enable this service or for pricing enquiries please contact Competitive Edge Information Systems Inc.
(519) 746-2303 info@competitive-edge.on.ca
- Additional Folders: Any additional folders on your computer/network can be backed up during this process. Simply enter the path to each additional folder in the list below. This can be used to backup patient headshots, standard forms or any additional files you would like to protect.
- Last Backup: This editable field tracks the last time the backup was completed. This date is used to determine which examination charting or additional files have changed since the last backup. Only files that have been altered and thus have an "last modified" date more recent than the last backup date will be included in subsequent backups.

Schedule

Schedule Export

Schedule data can now be exported from the system in the iCal format for use in external calendar applications. Schedule data can be exported directly from each schedule screen by clicking the iCal button in the top right corner. The iCal file can then be imported into your preferred calendar application.

Multi-Practitioner View

In addition to the three and four practitioner view schedules there is now an option that will display every practitioner and room at the same time. The schedule view can be used in place of the three or four practitioner view by changing your schedule setup options. To do this go to Maintenance|Clinic|Clinic setup. Click the Misc Options button. Find the Single Day heading and change the option to 'MultiPractitioner'.

When using the multi-practitioner view every practitioner will appear in the leftmost column in black, followed by each room in blue. A two hour portion of the day will appear horizontally to the left. Clicking the time buttons just above the schedule will change the two hour viewable window. Dark grey squares indicate blocks in which the practitioner is not scheduled to work.

To book appointments, simply double-click the block representing the start of the appointment.

To view patient information, single-click a scheduled block and then click the (i) information button at the top left of the screen.

Confidential Notes

Appointments now have two note options, the existing schedule note and new a confidential note. The new note type will only appear on screen for one appointment; whereas, the original schedule note will print on some schedule reports.

Invoice

Quick Pay

In most cases invoices are paid in full via one payment method, the new Quick Pay option speeds up this process. To pay the outstanding balance of an invoice simply select a payment method at the bottom of the screen and click the Quick Pay button. More complicated payments can still be handled by clicking the traditional Pay button.

Invoice Edit - Quantity

Completed invoices can still be edited using the edit button on the bottom right of the screen. However, now altering sales quantities and products on the form will also update associated inventory levels.

Invoice Edit - Void

Marking an invoice as 'void' can no longer be achieved without using the inventory edit password. To void an invoice first click the edit button, enter the password and then select void.

Reporting

Top Patients Report

The Top Patients Report will rank display your top patients by either sales or number of visits. To access this report go to Reports|Patients|Patients and then click the Top Patients tab. This tab contains its own list of filterable options for the report and a field which specifies the number of patients that will appear on the report. For example, the top 50.

Demographic Filtering

New birthday and birth date filters on the patient report form (Reports|Patients|Patients) allow all of the patient reports to be filtered by age range and birthday range.

Miscellaneous

Tracking

Tracking records can still be created for invoice items but can now also be created for items not initiated on an invoice as well. To start the process from an invoice click the track button beside the item you wish to track. To track an item not on an invoice go to Functions|Tracking and then click 'New'.

An additional date field has been added so it is now possible to track when an item was sent out, received, the client contacted, and the item picked up.

Inventory Warnings

In addition to printable product information you can now track internal, on screen only, product notes and add pop-up reminders.

Exam Charting

Diagnosis

Each patient visit can now be tagged with a diagnosis or classification. This field can be searched, filtered and automatically added to a patient's condition list.

Allergies, Conditions, Meds

A summary of the patient's important medical data is visible and editable directly from the charting window. Use the edit button to jump back to the patient record to change or add conditions, allergies and meds.

Email

Easily email the entire exam, the exam history or individual pieces of patient information.

Security

The software can automatically lock exam records that have been left open. To enable this feature go to Maintenance|Clinic|Charting Setup and specify the number of days before an exam record will be automatically locked.

Invoice

Fully control the invoice from the exam window. The 'Additional Products and Services' tab can be used to add additional products or services to the invoice or to edit the price or quantity of the scheduled service.

Email

Mass Email Manager

In order to combat spam, most email providers impose limits on the rate and total number of messages that can be sent through your account. For a fee most providers will increase your mailing limits, if desired. However, to help handle the problem mass mailings that are cut off mid stream an email manager has been added.

During any mass mailings or printings the manager screen will appear. As each message is sent successfully the manager flags the item in the list as sent. If the mailing fails part way through, you can access the manager by going to Functions|Email|Mass Email List and then continue sending where you left off.

New Options

Patient Quotes can now be emailed directly from the Quotations form. Just click the envelope icon. Patient details can also be excluded from schedule printings if desired. Go to Maintenance|Clinic|Clinic Setup click Misc Options and set 'Display Patient On Exports' to now if you wish to hide this information.

Reports

Every report in the Report section of the system can now be emailed as a PDF attachment. Simply click the envelope icon. PDF files can still be produced without emailing by clicking the PDF icon.