



**CEIS Office Management System
2017 New Features Guide**

Table of Contents

- Table of Contents 2
- Invoices 3
 - Insurance Policies 3
 - Quotations 3
 - Unit Cost 3
- Patients 3
 - Custom Fields 3
 - Default Invoice Note Fields 3
- Inventory/Services 3
 - Default Room 3
 - Internal Inventory 3
- Messenger 4
 - Internal Text Messaging 4
- Reminders 4
 - Auto Emails 4
 - Hide Reminders 4
- Reporting 4
 - Invoice Paid in Full 4
- Schedule 4
 - Charting Indicator 4
 - Schedule Exceptions 5
 - Schedule Practitioner Note 5
 - Schedule Right Click 5
 - Schedule Setup 5
 - Schedule Status 5

Invoices

Insurance Policies

Patient insurance policies can now be setup to display the invoice percentage covered and an Insurance Policy ID can be tracked. Go to a patient record and select the insurance tab to see the new fields.

Quotations

The Quotation (Functions|Quote) form has been dramatically altered to allow for expanded notes and instructions to be entered and the Valid Until Date is now editable.

Unit Cost

The unit cost of products can be edited directly from the invoice. Double click on the Price of an item to reveal the editable Unit Cost field. Simply double click the Price or Unit Cost fields to hide the cost again.

Patients

Custom Fields

Setup up to 10 custom fields to track additional patient information. Go to Maintenance|Patient|Custom Fields to name the fields you would like to use. The fields checked as active will appear on the Details tab within the Patient record. Check the Show On Chart option to have the information also appear on the Exam Charting form.

Default Invoice Note Fields

Default messages can be entered on a per patient basis that will appear in the Invoice Note and invoice Confidential Note fields every time that patient is invoiced. These fields can be used for a variety of specialized reminder and note keeping tasks. To edit this information open a patient's record and select the Misc tab. Any information entered into the Invoice Note and Confidential note fields will automatically appear on all new invoices.

Inventory/Services

Default Room

Services (Functions|Inventory|Product/Service Find) now contain a Default Room option that can be selected. Each time the services is used on the schedule it will automatically default to the specified room.

Internal Inventory

The new internal inventory type allows office items to be ordered and inventory levels tracked but they will not be available on the schedule or invoice forms.

Messenger

Internal Text Messaging

Text based messages can now be sent to others who are using the system on another device within your network. To use this feature, each user must log into the system from the main login screen using their own Employee record. The Messenger function can be accessed by clicking the Messenger button on the Main Switchboard. Select the New tab to send a message to a user.

When a new message is received the Messenger window will pop up on screen. Each active conversation with another user will appear in its own tab.

Your copy of any conversation can be deleted by clicking the delete button in the bottom corner of the tab; however, the conversation will still be accessible to the other user.

Reminders

Auto Emails

Automatic email reminders can now be sent to patients for reminder records. To do this check the Email Reminder field on any reminder and enter an Email Subject. The reminder message will be sent to a selected patient on the reminder date.

Reminder priorities can also be setup to default to automatically email reminder records. This can be setup in Maintenance|Clinic|Reminders|Reminder Priorities.

Hide Reminders

The Hide button on the Switchboard Reminders tab allows the reminder to be hidden from the Switchboard but not deleted from the system. It will still be accessible through the Reminder Find and Patient forms.

Reporting

Invoice Paid in Full

The new Paid In Full date range adds the ability to see only items that have been paid on all invoice reports (Reports|Invoices). Simply enter a full or partial date range to limit the reports to items paid in full.

Schedule

Charting Indicator

After appointments have been charted the appointment will appear, preceded by the ~ character. Appointments containing a schedule note will also be preceded by the * character.

Schedule Exceptions

Exceptions altering available schedule hours for a particular day can now be setup for all practitioners simultaneously. To add an exception that applies to all practitioners at the clinic go to Maintenance|Clinic|Schedule|Schedule Setup Exceptions and select ALL in the practitioner drop down box.

Additionally, any appointment scheduled outside of a practitioner's scheduled working hours will generate a prompt asking if you would like to automatically add a schedule exception to accommodate the new appointment.

Schedule Practitioner Note

Double click the date fields on each schedule form to add a note or reminder for a practitioner on the schedule for that day. The date will appear red when a note has been entered, alerting users that a message exists.

Schedule Right Click

Right click the start time on any schedule view to reschedule, copy or change the status of an existing appointment.

Schedule Setup

The schedule setup form (Maintenance|Clinic|Schedule|Schedule - Setup) now has a start and end date. This allows for an alternate schedule setup to begin on a date in the future. Schedule setup date ranges cannot overlap, a subsequent setup must begin the day following the preceding date range.

Schedule Status

The new IR button on the schedule form and right click menu represents the In Room status. In addition, the Arrived and Arrived Late statuses will now appear as different shades on the schedule display.