Estimate Locking

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Overview

Estimate locking is available in AVImark version 18.22.0 and above. The locking feature has been added to Patient Estimates which allows users to lock an estimate once all edits have been made. Locking the estimate takes away the ability to edit the entries on the estimate. The user is still able to Post or Decline estimate entries, Print, and select a different Doctor.

Locking Estimates

To lock an estimate, go to the Estimates tab for the patient.

1. On the estimate, **right-click | Change**.

2. In the **Change Patient Estimates**, click **Lock.** *Note: the estimate must have an expiration date in order to be locked.*

3. A prompt displays with the option to proceed or not. Click **Yes** to lock the estimate. Click **No** to return to the estimate unlocked.

4. Upon returning to the Change Patient Estimate window the locked button will appear greyed out and the title of the window will contain (LOCKED).
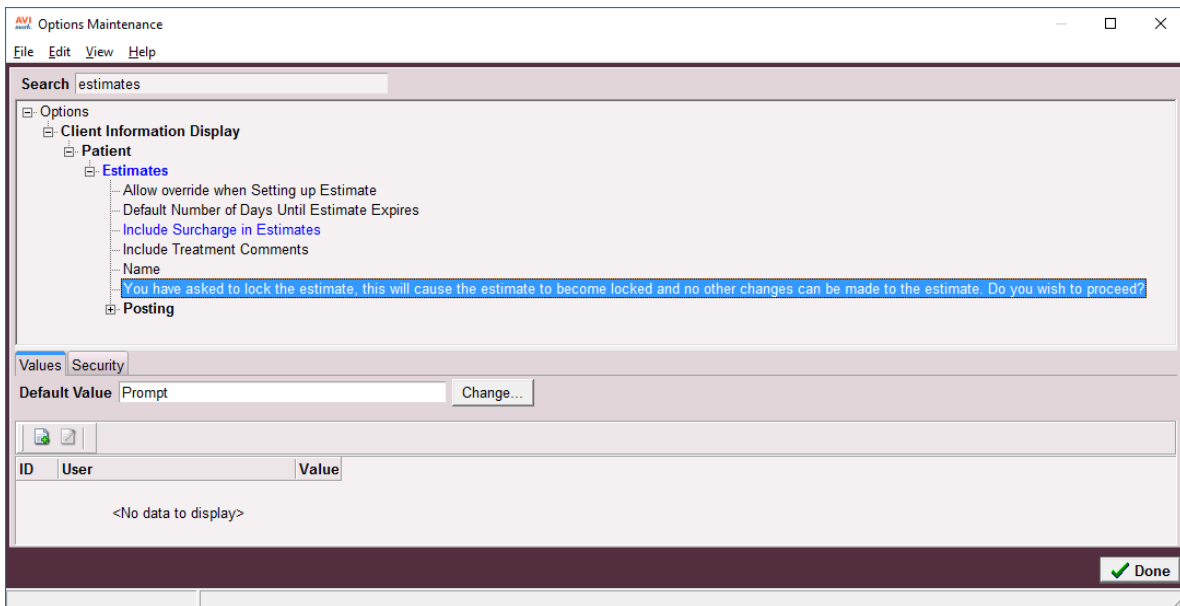
Options Maintenance

There is an advanced option which allows users to set the default value for all users or set users under ID/User/Value if a user needs to be set differently from the default value.

1. Click ![wrench icon] and search for **estimates**.

2. With the locked option highlighted, click **Change** and make the preferred selection for the Default Value:

   o **Prompt**– The prompt above will open each time Lock is clicked.

   o **Yes** – The estimate will automatically lock when Lock is clicked.

   o **No** – The estimate will NOT lock when Lock is clicked.

Estimate Tab

Once the estimate is locked, on the Patient Estimate tab, the estimate will display **(L)** at the end of the estimate name.
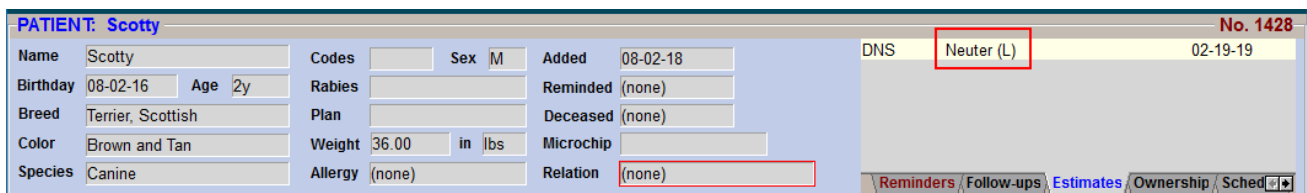
Locked Estimate Options

Once an estimate is locked, the users cannot add, remove, or edit any entries on the estimate. The user will, however, have the ability to Decline, Post, Select and Post, add Notes, and Print the estimate.

1. **Right-click | Change** on the locked estimate.

2. Use the Ctrl or Shift key to highlight items to select.

3. **Right-click | Select** or press the spacebar to select items from the estimate.

Expired Estimates

The only way to unlock an estimate is for it to Expire. An estimate expires once the Expires On date has past. The estimate will unlock and is then editable. If any prices were increased within the Treatment or Inventory List, they will be reflected on the estimate once refreshed.

Expired estimates will also show in Red so at a glance the user knows the estimate is expired.

LockEstimate Utility

There is a utility to lock all valid estimates, meaning they have not expired. The utility will lock all estimates that have not expired as of the date you are running it looking forward. Again, once an estimate is locked there is no unlocking it. Run a backup before running this utility.

1. Before running the LockEstimate Utility, create a backup. Before backing up your AVImark files, be sure **all workstations have closed AVImark**.

2. With your mouse over the AVImark Guardian icon on the Desktop, **right-click** and from the shortcut menu, choose **Run as administrator**.
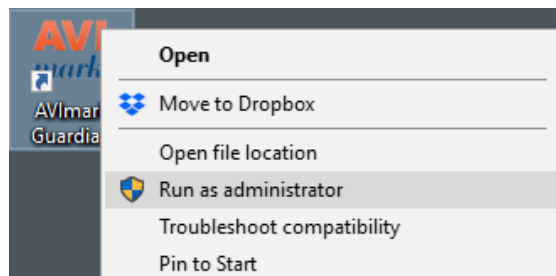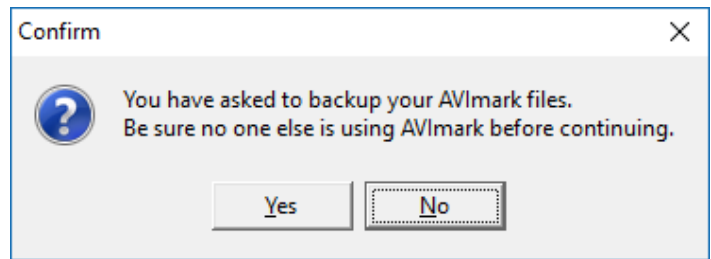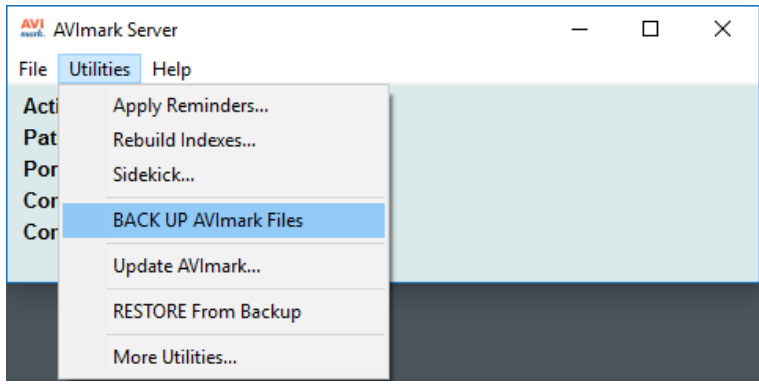

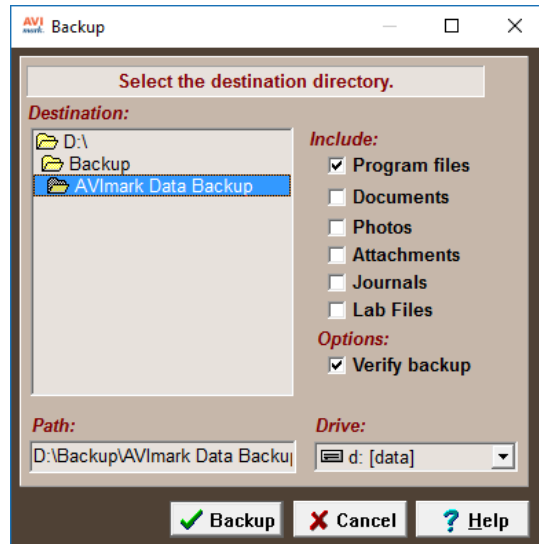3. In AVImark Server Guardian, with the option **Open AVImark Server** selected, click **Run**.
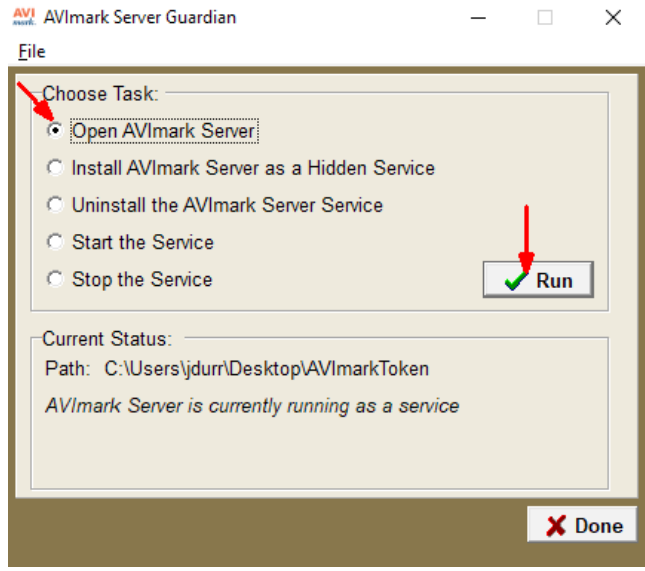
The AVImark Server opens.
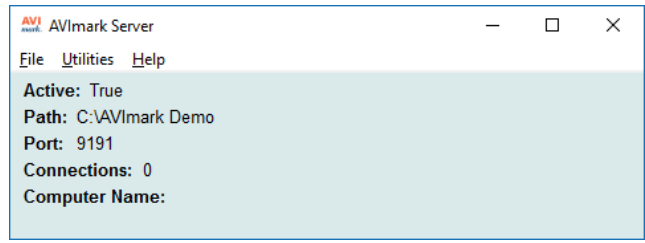
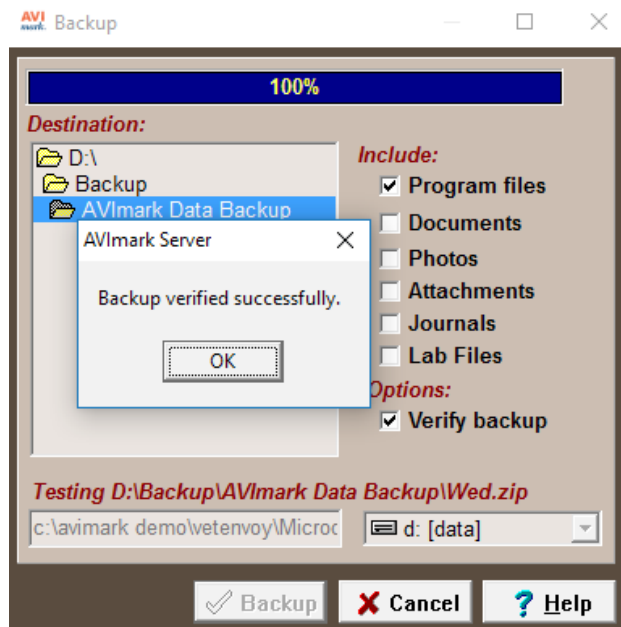4. From AVImark Server, click on **Utilities | BACK UP AVImark Files**.

5. Click **Yes** to proceed with the backup.

6. Under Backup Options, select the option **Program files** and **Verify backup** then click **Backup.**
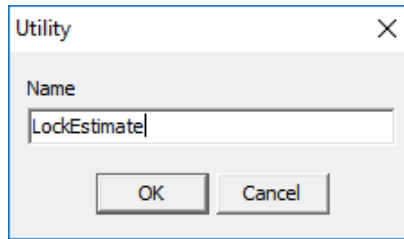
7. Once the backup is finished, a **Backup verified successfully** message will appear. Click **OK** on the message.

8. Close AVImark Server Guardian and return to AVImark.

9. From the menu bar, click on **Utilities | Utilities**.

10. In the Utility dialog box, enter **LockEstimate** then click **OK**.

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11. A message will appear to run a backup. If you followed the previous steps to create a backup, click No on the message.

12. Click **Run** on the LockEstimate Utility. *Remember, once an estimate is locked there is no unlocking it.*