ImproMed® training resources

Adapting and adjusting your practice workflow

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Mass communication using email

Mass communication using email

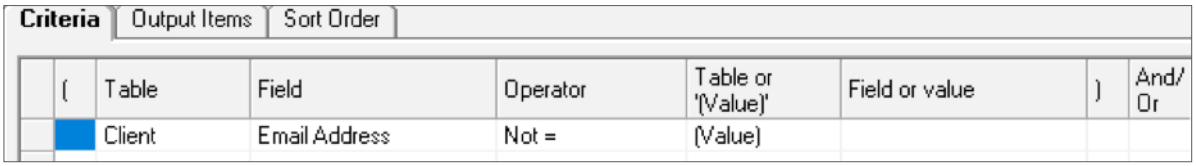
Perform Search

To send an email refer to the instructions in your ImproMed Help Text.

1. Go to **Help**
2. Click on the **Search Tab**
3. Type in **Communications**
4. Scroll down to the **Perform Search** section

Choose a search detail **C-Email Address**. If you don't have C-Email Address as a choice, create the search detail with the following criteria. The criteria in this search will send to any customer that has an email address in the Email Address field.

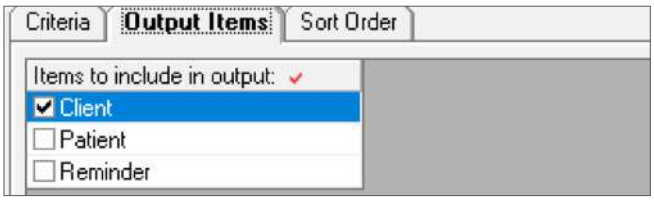
Criteria=



Criteria | Output Items | Sort Order

(	Table	Field	Operator	Table or '(Value)'	Field or value	)	And/Or
	Client	Email Address	Not =	(Value)			

Output Items=



Sort=

Criteria | Output Items | Sort Order

Table	Field	Order
Client	Last Name	Ascending

Send Emails

You can print labels, postcards or letters, or send emails using your search criteria result. To send an email refer to the instructions in your ImproMed Help Text.

(cont.)

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Mass communication using email

1. Go to **Help**
2. Click on the **Search** Tab
3. Type in **Communications**
4. Scroll down to the **Send Emails** section.

If you do not have a template, search **Help Text** for **Email Template Setup**.

Important note: **Neither ImproMed, ImproMed Equine, or Covetrus is responsible for any text or image content in the emails you create and deploy. Please be sure to proofread carefully before sending your custom messages, as they cannot be canceled once they are in queue.**

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How to:
Remote access

How to: Remote access

Accessing your software from outside your clinic is possible.

To do this, you will need to select a remote access software solution and install it on both the workstation or server you wish to access and the computer you will be using to connect in.

While there are many options for remote software, with some offering free trials, here are a few to consider:

- https://www.logmein.com/try-access
  LogMeIn has recently announced free Emergency Remote Work Kits for Healthcare Providers. Check their website for eligibility requirements.
- https://www.gotomypc.com/members/register.tmpl?Location=en_US&FreeTrial=true

Additionally, our support staff would be happy to help you with any questions or issues you have when setting up your remote access. Here are a few things to keep in mind when selecting a provider or using it:

- **Always select the Professional Version.** Yes, it may be slightly more expensive but the professional version for this type of software is more appropriate for your business.
- To be able to access the software remotely, **you must leave the workstation/server on**. Make sure you reboot the workstation/server and test your access prior to leaving the practice. This will ensure that any updates are run and should reduce the risk of the computer rebooting while you're not there. Reminder: rebooting servers should be done when no one is utilizing the software.
- Install the software on the computer you normally use in the practice. This ensures you will have the same experience and rights as you would normally have.
- With any remote access software you are opening access to your practice network. This can increase the risk of virus/malware. You should read the security notes from your provider and ensure that you have an up-to-date antivirus solution on your clinic network and the computer you will use to access your systems.

Contact your local IT professional or our qualified support team with any questions. Covetrus is not affiliated with any remote access providers. Make sure you read all terms and conditions of any products you purchase or trial.

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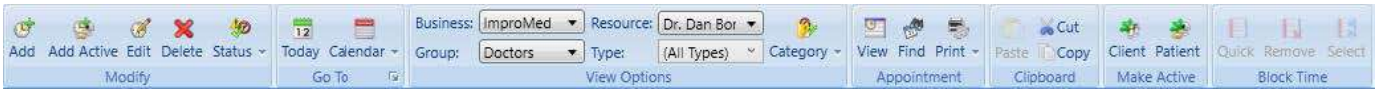
Scheduling with EasyTime, Clinic Census, and Boarding

EasyTime

The EasyTime module is used for managing appointment schedules - in a flexible and easy interface - designed to provide an at-a-glance view of the business' obligations for any given day.

Overview

Toolbar



EasyTime has its own toolbar with shortcuts to schedule appointments and choose display options. EasyTime provides a quick and easy way to see when a sick patient can be squeezed in and gives the ability to manage each business' work flow using **six views** for displaying resources and the corresponding appointment information.

Resources

Resources are used to schedule appointments in the EasyTime Appointment Scheduler. A resource can be defined as anyone or anything that may have time obligations to be scheduled and managed accordingly. A resource can be an exam room, surgery room, technician, or veterinarian.

Appointments

Create

Appointments in EasyTime can be made for the active client/patient or appointments may also be created using the Find client/patient. Operators can also create clients/patients directly from the Add Appointment dialog box.

From the Ribbon:

1. Click **Scheduling | EasyTime.**

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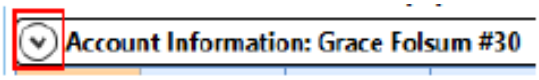
2. Select the client, if applicable.
3. Highlight the desired time slot under the preferred Resource.
4. Click **Add Active.**
5. Select the patient(s) for the appointment.
6. Fill in the appropriate fields.
7. Select the **Visit Reason** then click **Set** to define the appointment duration. *Visit Reasons can be added to the Summary or to the tab for each patient selected for the appointment. (optional).*
8. If the appointment is to be repeated, click on the **Recurring** tab and define when the next appointments are to occur.
9. Click **Apply** to save changes. Click **OK** to close the Appointment screen.

Modify a client's Account Information from within the Add or Edit Appointment screen. Click the "chevron" located at the top of the Add or Edit appointment screen.



Create

1. Highlight the desired appointment.
2. Click **Edit**.
3. Edit the necessary appointment properties.
4. Click **OK**.

Double-click the appointment to Edit.

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Delete

1. Highlight the desired appointment.
2. On the EasyTime toolbar, click **Delete**. *This changes the Appointment Category to **Deleted**. Deleted appointments can be hidden or displayed*
3. If the appointment is a recurring appointment or a group appointment, respond appropriately to the message displayed.

Block Time

Use the **Quick** button to block times out on a resource's schedule that come up at the last minute. To block out recurring times on a schedule, use Block Times from Setup EasyTime.

Setup EasyTime

There are several areas of EasyTime that can be customized and options selected. Begin by going to **Scheduling | EasyTime | Assign Block Times**. This opens the Setup EasyTime screen and from here go to the different areas to customize EasyTime.

Assign Block Times

Assign Block Times is used for blocking out a resource's schedule so the resource shows as not available for appointments.

1. Select the **Resource**.
2. Select the reason for the **Block**.
3. Click in the calendar(s) to assign the blocks.

Clicking again removes a block. Use Select by options to quickly block time based upon a week, day of week, month.

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Block Times

Before assigning block times, you need to create the reasons for block times.

1. In **Create** mode, enter the name for the block time. *If this block will be used as a Quick Block, check the box.*
2. Select a **background** and **foreground** color.
3. Enter a **Start/End Time** or select **All Day** or **Overnight**.
4. *(optional)* Enter a **Description**.
5. Click **Apply**.

Color Schemes

Color Schemes are used to quickly distinguish between resource groups.

1. In **Create** mode, enter the name for the new color scheme.
2. For each area of EasyTime, select a color.
3. Click **Apply** to save changes.

EasyTime options

Review the various options that can be enabled or disabled for EasyTime and choose those appropriate for your business.

Resource groups

Used to organize the resources that can have appointments. For example, a group might be Doctors. A group could be exam rooms. A group could be equipment.

1. In **Create** mode, enter a name for the group.
2. *(optional)* Enter a **Description**.
3. Enter the **Start** and **End** time when the resources assigned to this group are available for appointments.
4. Indicate if this is for **Standard** or **Mobile** appointments.
5. Click **Apply** to save changes.

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Resources

When you have Resource Groups setup, now assign Resources to those groups.

1. In **Create** mode, enter the name of a Resource.
2. *(optional)* Enter a **Description**.
3. Assign the resource to a group.
4. If the resource is an employee, select the employee name. Otherwise, choose the option **-- This is not an employee resource.**
5. Click **Apply** to save changes.

Resources display order

Use this tab to change the order of resources as they are displayed from left to right in EasyTime.

Status Types

Status Types track the appointment for a client/patient. Examples of Status Types may be: Not Arrived, Checked In, Ready To Go Home, Canceled, No Show, Checked Out. Each Status Type can have a different color so at a glance staff can see the current status of an appointment.

1. In **Create** mode, enter the **Name** for the Status Type.
2. *(optional)* Enter a **Description**.
3. Select a background and foreground color.
4. Select a **Category**. *Appointments can be hidden or displayed based upon the Category.*
5. Select which reports will print appointments based upon the Status Type.
6. Click **Apply** to save changes.

Visit Reasons

A visit reason is a predefined appointment block that can be inserted into any appointment.

1. In **Create** mode, enter the name for the Visit Reason.
2. Select which **Species** can be seen with the Visit Reason.
3. Select which **Resource Group** can see patients with this reason.

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4. Enter the typical **duration** for the visit.
5. Choose a background and foreground color.
6. *(optional)* Enter a brief **description** of the Visit Reason.
7. *(optional)* Enter a **message** that would pop up when the Visit Reason is selected.
8. Click **Apply** to save changes.

Visit Reasons display order

Change the order Visit Reasons appear in the Add/Edit Appointment screen.

If Visit Reasons are placed in order of frequency, it may take longer to search for a reason vs. if they are in ascending or descending order.

Clinic Census

The Clinic Census Module gives businesses the ability to monitor and analyze the overall performance of patient flow.

Using Clinic Census

Check in options

If a patient is checked into an appointment or reservation, the program can be configured to move the patient to the default census location, prompt for a location, or do nothing.

Manually move patients/resources

From the Ribbon:

1. Click **Scheduling | Clinic Census.**
2. Click and drag a patient or resource from one location to another location during their visit.

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Census Log

The Clinic Census module automatically tracks how long a patient spends in each location. To view the log details, click the **Census Log** button.

Check Out locations

If a location is defined as a **Check Out** location, when the patient is dragged into that location of Clinic Census, the Invoice screen appears. If the patient's invoice is concluded, the patient is removed from Clinic Census.

Wait status

Keep on eye on the status of a patient while in the practice. Right-click on the patient in Clinic Census to keep the status updated. At a glance, use the color scheme of the wait status to know the status. Or, mouse-over the status to see who is seeing the patient.

Right-click options

Use the shortcut menu on a patient in Clinic Census to move the patient to a different location, change the Wait Status, select a visit reason, make the patient the active patient, remove the patient from Clinic Census.

Setup Clinic Census

To customize the Clinic Census, click on / **| Setup | Clinic Census** then select any of the following setup screens:

- **Locations -** Each room or area in a business that should display as a location in the Clinic Census module needs to be set up. Each location is defined with background and foreground colors, panel size, and font formatting. The type of location is also defined here. Is the location and check in or check out location?

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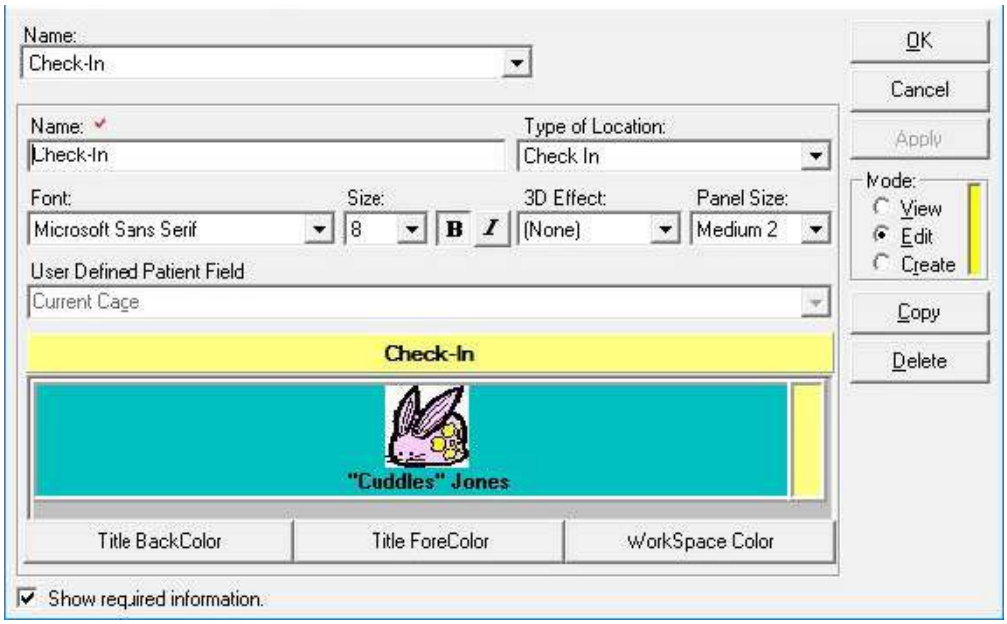
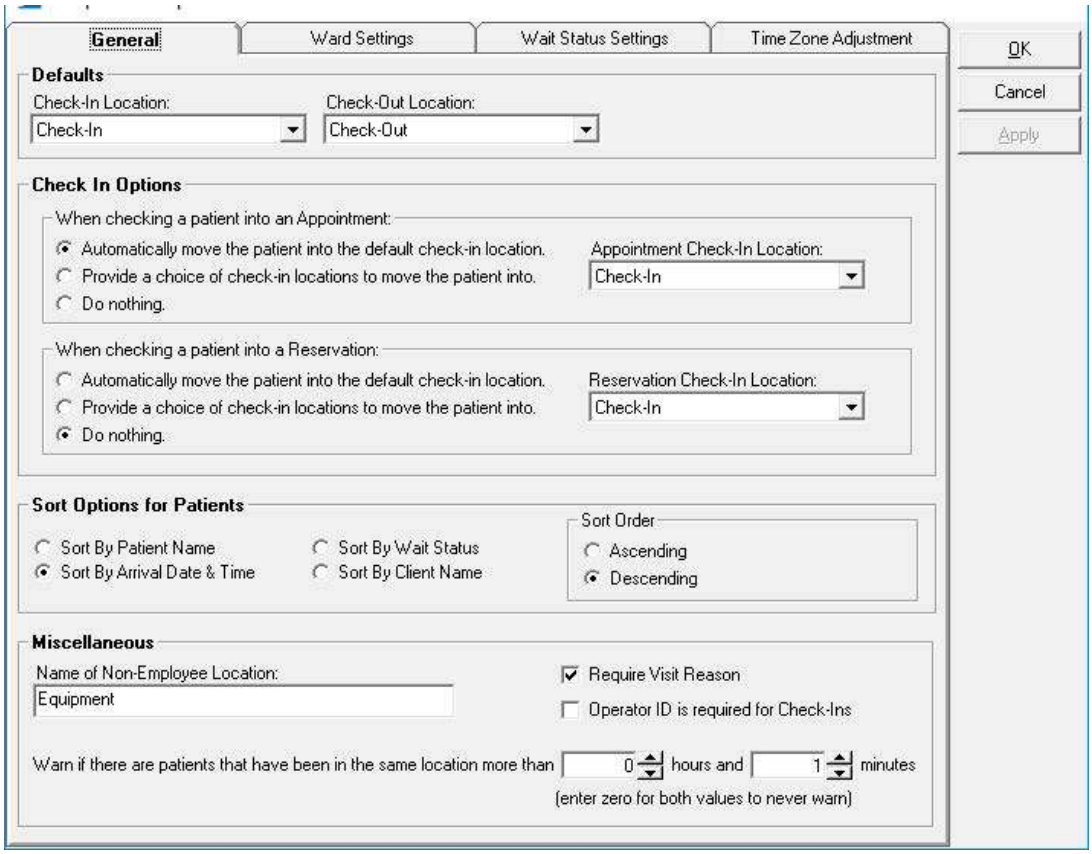


- **Options -** Use the Clinic Census options to set your preferences for this module.



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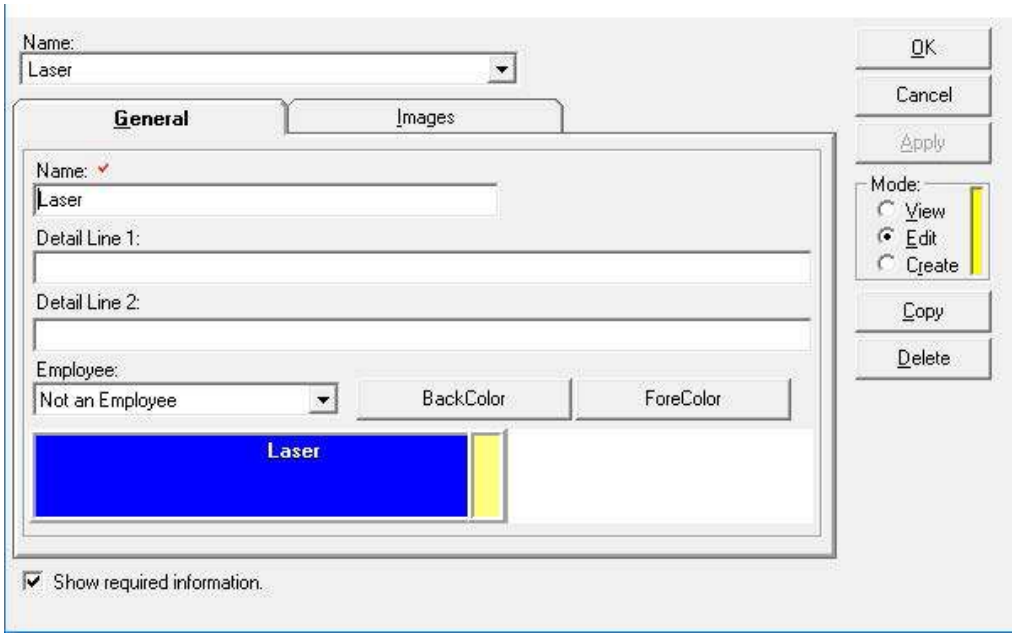
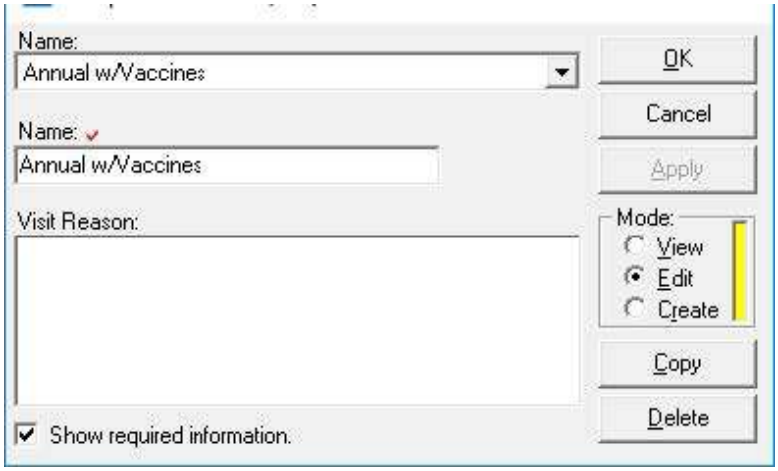
- **Resources -** A resource can be an the employee working with the patient or items such as lab equipment and X-ray machines. Resources can be dragged to different locations so at a glance you can see who is seeing a patient or where equipment is currently being used.



- **Visit Reasons -** When a patient is displayed in the Clinic Census module, a reason for their visit can also be displayed beneath their name. Visit reasons are defined with a unique name and description. Each time a patient is moved to the Clinic Census screen, a prompt appears asking to select a reason for their visit.



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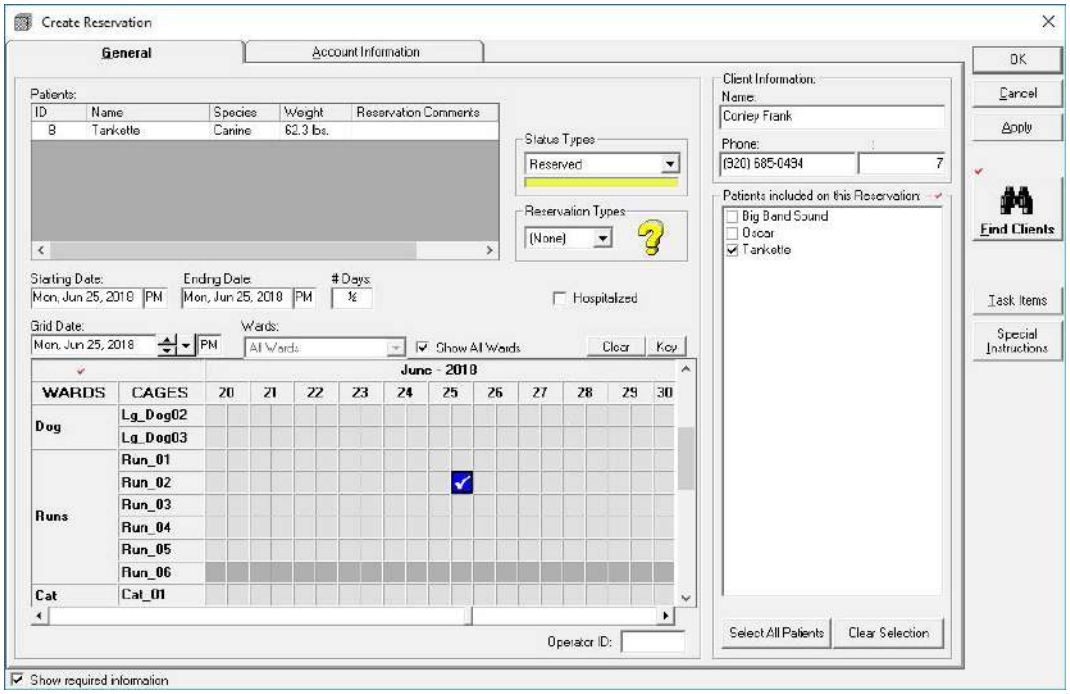
Boarding

The Boarding module provides a computerized method for managing a boarding facility. Boarding has many powerful features including: managing reservations, maintaining a waiting list, linking products to reservation types, and an integration with Status Notes and Process Management modules.

Create a Reservation

From the Ribbon:

1. Click on **Scheduling | Boarding.**
2. Click the **Create** button.



- If a client and patient are already selected, that information will be visible.
- If a client and patient has not been selected, click the **Find Clients** button to find and insert the client and patient information.

3. Click the **Account Information** tab.
4. Select the patients to be boarded.

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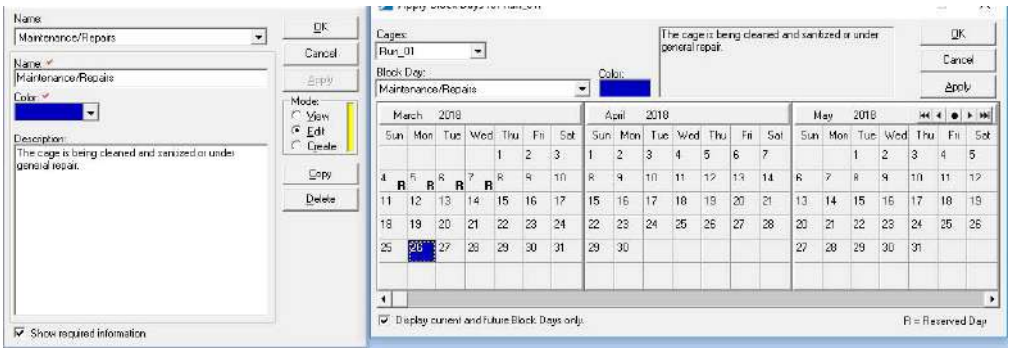
5. Click the **General** tab.
6. Fill in the necessary boxes for the **Dates** and **Cages** to fill. The dates must be consecutive.
7. Click the button next to the appropriate **Status Type** (Reserved is selected by default).
8. Select a reservation type to assign to this reservation using the Reservation Types drop-down.
9. Select **Hospitalized** if the patient is being kept for observation.
10. To add tasks to the reservation, click the **Task Items** button.
11. Enter an **Operator ID**, if necessary.
12. Click **Apply** to save the changes and keep the dialog box open, or click **OK** to save the changes and close the dialog box.

Setup Boarding

ImproMed recommends configuring the following to use the Boarding module to its fullest potential.

To access the setup screens, click on I / | **Setup | Boarding** and select any of the following setup screens:

- **Block Days / Assign Block Days -** The block days feature in the Boarding module is used to provide a reason a cage is not available for reservations on the selected day(s). Use the **Assign Block Days** to mark the cage as unavailable.



- **Boarding Cages -** Cages represent physical cages in a veterinary business used to keep patients while they are staying at the business. An unlimited number of cages may be generated in ImproMed, but each must be assigned to a ward. Therefore, at least one ward must be created before creating any cages.

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- **Boarding Options -** There are some basic settings you can apply to customize the Boarding module to fit your needs.
  - **General** - Apply warnings, restrict the number of days boarding reservations can be made into the future, define a default reservation type, apply a Day View size.
  - **Mode** - Operators may select Full Day Reservations or Half Day Reservations. The Half Day Reservation option displays two reservation slots for each day: AM and PM.
  - **Colors** - Operators can select which colors the module displays for specific screen elements. Colors can be assigned for use in the Day view and Month/Year calendar views, as well as cage colors used to identify cage availability.
  - **Wards & Cages -** Change the display order of Wards and Cages.
- **Boarding Reservation Types** - The Day and Month views of the Boarding module, use icons to graphically display different types of reservations. Reservation types are used to define the different types of reservations based on species, breed, weight, hospital or surgery status, etc.
- **Boarding Status Types** - When a reservation is made in the Boarding module, a status type is assigned to the reservation. Status types have two functions. First, they display a visual indication on the status of reservations (checked in, reserved, no show, etc.). Secondly, status types can be used as a filter for generating boarding status reports.
- **Boarding Wards** - Create and define virtual wards that represent the actual wards in a facility. An unlimited number of wards may be created and each ward can be populated with cages.

Process Management

Process Management brings task management and automation tools to the desktop. The module particularly enhances the hospitalization features of the Boarding module by adding tasks that need to be completed during a patient's hospital stay.

From the Ribbon:

1. Click on **Scheduling | Process Management.**

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2. Select a patient.
3. Click **Create**. The Create Task dialog box opens.
4. 4. On the **General** tab:
   a. Select either the Predefined Task or Write-In Task option.
   b. If this is a write-in task, enter the necessary information.
   c. If this is a predefined task, select the task to assign using the Task Name drop-down.
   d. Click the **Complete by Date** up/down arrows to enter a completion date.
   e. Enter a **completion time.**
   f. Set the priority if different than the default by clicking and dragging the slider.
   g. Choose the Group or Employee Assigned to Task.
5. To add a client/patient to the task, click the Client/Patient tab.
   a. Click the check box to **Include Client on this Task**. The selected client is entered.
   b. To enter a different client click **Find Clients** and perform a client search.
   c. To add a patient to the task, click the check box next to the appropriate patient name.
6. To add dependencies to the task, click the Dependencies tab.
   a. Click the task in the right column to make a dependency of the task being created.
   b. Click **Add**. The selected task is moved to the left column.
   c. Repeat these steps to add each additional dependent task.
7. To make the task a recurring task, click the **Recurring Task** tab.
   a. Click the frequency this task should recur.
   b. Click the **Start On** up/down arrows to enter the recurring start date.
   c. Click the **Until** up/down arrows to enter the recurring end date.
   d. Click the up/down arrows to enter the interval this task should recur. A list of dates the task will recur opens in the Scheduled Occurrences window.
8. Click OK.

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Status Notes

The Status Notes module closely interacts with the Boarding module. Reservation status information can be viewed for individual patients, or printed for a specified range of clients or patients.

Before you can create a status note, the Boarding reservation must exist for the patient, and the patient reservation status must be 'checked in'.

Create a Status Note

From the Ribbon:

1. Click on **Scheduling | Status Notes.**
2. If not already selected, choose the client and patient for which this status note is being created.
3. The current date and time appear in text windows. To enter a different date, click the up/down arrows and click on the desired date.
4. Click **Add Row**. A blank row opens.
5. Enter the new status note.
6. Repeat to add additional status notes for the selected patient.
7. Click **Apply** to save the new status note and keep the Status Notes module open, or click **OK** to save the status note and close the module.

Printing a Status Notes Report

From the Ribbon:

1. Click on **Business | Reports | Boarding Reports | Status Notes Report.**
2. Click **Print**.
3. Enter the **Starting Date** and **Ending Date** up/down arrows to define the period of the report.
4. Click the check box(es) to include each business with boarding facilities in the report. Single business systems will be selected by default.

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5. Define the **Client Range** for clients then the desired **Print Order.**
6. Click **OK** to print the status notes report.

The Status Notes Report can also be printed from the Reports module. From the Ribbon, click on Business | Reports | Boarding and select the Status Notes Report.

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Wellness Plans, Treatment Plans, and Scheduled Payments

Wellness Plans, Treatment Plans, and Scheduled Payments

Encourage patient visits with Wellness Plans and Scheduled Payments. Track the patient's care while in the hospital with Treatment Plans.

Wellness Plans

ImproMed's Wellness Plans are services bundled together to create wellness "packages" at set prices for the different types of patients you serve. Once setup, manage these plans by collecting regular payments and managing appointments throughout the year. A patient may also have multiple plans associated with their record.

Setup Canned Wellness Plans

You will need to create Canned Wellness Plans before you can add a Wellness Plan to a patient's record.

From the Ribbon:

1. Click on **Invoicing | Wellness Plans | Canned Wellness Plans.**
2. Click **Add.**
3. Enter the **name** for the Wellness Plan.
4. Set the **duration** of the plan if other than 12 months.
5. Click **Add** to begin adding the products that make up this plan.
    a. Begin typing the name of the product then select the appropriate one to add to the plan.
    b. Enter the **Quantity**. *For example, the number of pills, cc's, or the number of cans.*
    c. Enter the **Instances** or the number of times this item is part of the plan. Click ∞ to give an indefinite amount of instances for this item.
    d. Enter any percentage of **discount** applied to this item, if any.
    e. Click **Save & New** to save the current plan and create another one or click **Save & Close** to save the current plan

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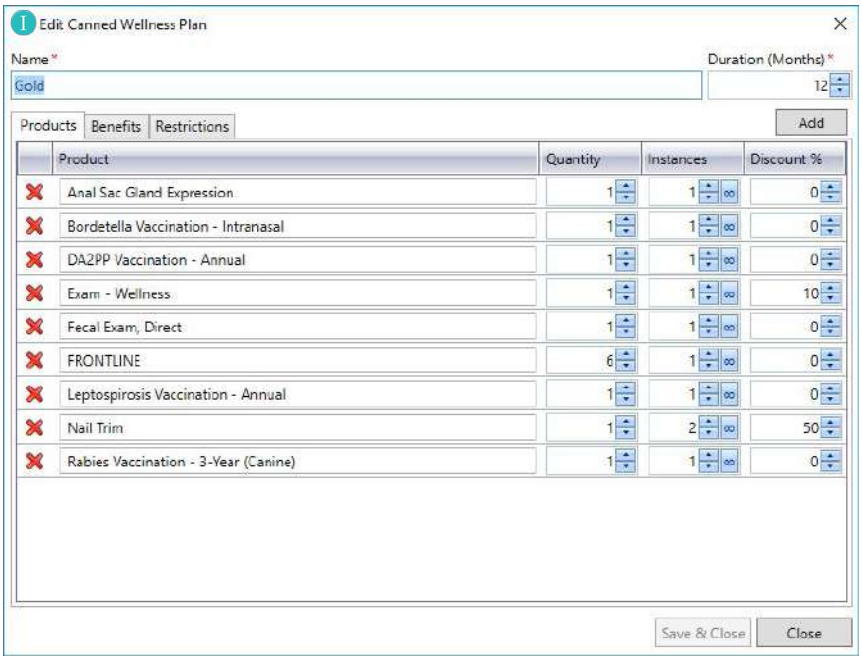

6. Click on the **Benefits** tab. On this tab, add any product categories the client will get a discount on just for having the plan.
7. Click on the **Restrictions** tab. This plan can be limited to a selected species.

Wellness Plans Settings

From the **Settings** screen, enable any of the options that would suit the needs of the business.

- **Prompt for employee who sold the wellness plans.** If you plan to pay a bonus to employees who sell wellness plans, you will want this enabled. You may then run an Enhanced Report to find out who sold plans for the time period you define.
- **Selecting a bundle when activating a wellness plan will also include adding the components.** If enabled, and there is a bundle in the wellness plan, the bundle will show all components when added to the patient's record.
- **Automatically print report card upon concluding of wellness plan products.** As stated, the report card will print when products part of the wellness plan are concluded.
- **Show prices, discounts percent, and savings on report card.** If enabled, the report card show the prices, discounts percent, and savings.
- **Show payment plan section on report card.** If the client was setup with a payment plan for the wellness plan, the payment plan will print on the report card.

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Add a Wellness Plan

Follow the steps below to add wellness plans to a patient's record.

1. Select the patient.
2. From the **Ribbon**, click on **Invoicing | Wellness Plans.**
3. Click the **"add"** button .
4. From the **Add Wellness Plan for [patient name]** select the plan from the drop-down list.
5. Adjust the **Duration**, if necessary.
6. Add any additional products to the existing plan, if necessary.
7. Make any adjustments to product **Quantity, Instances,** and **Instance Price**, if necessary.
8. Click **Save & Activate** if the client is going to purchase the plan.
   a. The Conclude screen opens.
   b. Proceed with concluding the invoice applying the appropriate payment method.

Click **Save for Later** if the client has expressed interest in the plan but will confirm at another time if they will purchase the plan. However, ***the Wellness Plan cannot be used until Activated.*** When ready to activate a plan, click .

Once a plan has been activated, the Total Price of the plan will appear at the top of the Wellness Plan and the **Amount Client Paid** is displayed. As items from the plan are concluded on an invoice, the Instances are tracked and the **Value of Items Used** displayed.

Cancel a Wellness Plan

If a Wellness Plan needs to be canceled, it is up to the business to determine what to do with any amount owed to the client or to the business.

1. Select the patient.
2. From the **Ribbon**, click on **Invoicing | Wellness Plans.**
3. With the plan to cancel selected, click .
4. Click **Yes** on the prompt to confirm cancellation of the plan.
5. The Cancel Wellness Plan screen displays with options to select how you want to handle the financials for canceling.

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6. Choose the appropriate option for canceling the plan. If Amount to credit client or Amount due after cancellation are selected, the operator will be able to fill in the Amount that fits the situation.
7. Click **Save & Close** to proceed.

Convert to a Payment Plan

If a Wellness Plan needs to be canceled, it is up to the business to determine what to do with any amount owed to the client or to the business.

1. Select the patient.
2. From the **Ribbon**, click on I**nvoicing | Wellness Plans.**
3. Click . The Change Wellness Plan A/R to Payment Plan will open.
4. Select the employee making the change.
5. Enter the **Payment Method.**
6. Verify the **Amount to Change** is correct.
7. Click in **Amount Applied.**
8. Enter a **Reason.**
9. Click **OK.**

Add Card

If the business uses **XCharge** or **Vantiv** (Element) for card processing, you will be presented with the option to use the client's card on file to make future payments. ImproMed does not store the card number, however, through tokenization, you will see the last four digits of the client's card and process payments due using that card on file.

1. After Step 9 under **Convert to a Payment Plan**, if XCharge or Vantiv is used for card processing, the option to select the card on file (or Add Card) will appear.
2. Select the card from the drop-down list if the card is already on file. If not, click **Add Card** and follow the prompts to add the client's card.
3. When the transaction is complete, the Change A/R to Payment Plan will appear with the dates of Payment Due and the Amount.
4. Close the preview window.

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Wellness Plans Report Card

The Report Card is a report which shows the activity associated with a patient's Wellness Plan.

1. Select the patient.
2. From the Ribbon, click on **Invoicing | Wellness Plans**.
3. Click .
4. A preview of the Wellness Plan Report Card will display.
5. From the Preview window, you are able to print, email or save the report.
6. Click **Close** to close the preview window.

Wellness Plans History

The History tab in Wellness Plans stores the information of each Wellness Plan for the selected patient.

1. Select the patient.
2. From the Ribbon, click on **Invoicing | Wellness Plans.**
3. Click on the **History** tab.

On the History tab you are able to view:

- The name of Wellness Plans associated with the selected patient will appear.
- The start and end date of each plan.
- The total price for the plan.
- What the client paid.
- The value of items used from the plan.
- The original invoice when the plan was activated.
- Preview the Report Card.
- A plan can be renewed from History.
- If a payment plan is associated with the Wellness Plan, the operator can click the Payment Plan button to view the details.
- Status indicates if the plan is Active, Canceled, Completed, or Inactive.

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Process Scheduled Payments

For businesses who process card payments with XCharge or Vantiv, the Scheduled Payments module will be available. In the module, the business is able to retrieve a client's card on file through the card company. Using Scheduled Payments will help to keep A/R to a minimum, as payments can be made to the card on file. Allowing Scheduled Payments will also encourage clients to purchase Wellness Plans and keep them coming to visit your business for patient health care.

1. From the **Ribbon**, click on **Business | Scheduled Payments**. *If the business does NOT use XCharge or Vantiv for credit card processing, this module is not available.*
2. On the **All Payments** tab:
   a. Use the **Search Filters** pane to locate payments by client name, payment type, status, payment due, and/or payment amount.
   b. From the list of scheduled payments, click in the checkbox to select payments to process OR click the **Select Payments** button and choose the option **Select Payments Due.**
   c. Click **Process Payments.**
   d. From the Process Payments screen, verify the records displayed are correct.
   e. Click **Process**.
   f. Click **Yes** to proceed with processing the payments.
   g. The Status column indicates if the payment was successful or not. For payments that failed, contact the client to verify the card information.
   h. Click **Close** to close the Process Payments screen.
3. On the **Selected Client** tab, add the card on file and manage payment plans.
   a. With the client selected, click **Add Card**.
   b. Follow the prompts on the screen and the card processing device to capture card information.
   c. When complete, a card shows at the top with the last four digits displayed. More than one card can be added to a client's record.
   d. If any **Payment Plans** are set up for the client, the plans can be linked to a card on file.
   e. Payment schedules can be set up in the **Account Receivable Balance Payment** area. Click **Setup [Modify]** to setup or modify a schedule.
   f. Check the option to Enable Accounts Receivable Balance Payment with a Card On File.

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g. Select the option for payment to be made on the last day of each month or set the date when payment is to be made.

h. Click **OK**.

Treatment Plans

Treatment Plans create a virtual whiteboard that is accessible by every computer on the network in real-time and provides a view of all procedures that need to be performed for the patients currently in the hospital.

Setup Treatment Plans

From the Desktop:

- Click / **| Setup | Treatment Plans | Activity Tasks.**

Begin setting up treatment plans by creating tasks.

- **Activity Tasks -** These are tasks that need to be performed to keep the patient comfortable while in your care but they do not have to be done by the medical staff.
- **Monitoring Tasks -** Monitoring tasks generate medical record history and the tasks are recorded as a lab field. Once a monitoring task is marked complete, the medical record is created.
- **Monitoring Defaults -** The list of Monitoring Defaults comes from **Monitoring Tasks.** By defining Monitoring Tasks as Defaults, staff can quickly add those tasks to a patient's treatment plan from the Patient View.
- **Canned Instances -** Canned Instances are defined as the time in a day when tasks are typically performed. These instances could also be defined as multiple times in a day over multiple days.
- **Canned Treatment Plans -** A Canned Treatment Plan includes all task types which are typically administered in a treatment and the time(s), known as "instances", the tasks are performed.
- **Sections -** Treatments on the Treatment Plan are broken into sections. By default, there are two sections: Monitoring and Activity. The names of these sections cannot be changed. However, background and foreground colors can be modified.
- **Settings -** Treatment Plan Settings provides customized options for each business.

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Using Treatment Plans

The Treatment Plan is broken into different areas. View all patients in the hospital who require treatments from the **Whiteboard View**. View the selected patient's treatments from the **Patient View** tab.

Whiteboard View

From the Ribbon, click on **Invoicing | Treatment Plans**. This will open the module in the Whiteboard View.

Treatment Plan Task List

In the lower half of the Whiteboard View is the list of treatment tasks due.

- Patients on the Treatment Plan are listed in this view. Click on the patient name to view all treatments due for the patient.
- Click on the **time** in the Time Frame to view all treatments for all patients due at that time.
- Click on the **Circle** to view the treatments due at the time for that patient.

Marking Tasks Complete

In the **Complete Value** column:

- Click the **Record** button (if a Monitoring Task) and enter the value to mark the treatment complete.
- If an **Activity Task**, click the checkbox to mark the tasks complete.
- If a **Product**, click the checkbox to mark the treatment complete. This will send the product to the Invoice.

Patient View

The Patient View in Treatment Plans is where staff can view all tasks and instances for the selected patient. Treatment tasks can be **added, edited, deleted, skipped and discontinued** from this view. The view divides the tasks by their sections which are defined in Treatment Plans Sections Setup.

Like the Whiteboard View, **Record** or click the **Checkbox** to mark a treatment instance complete.

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