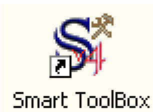
SmartSeries Professional

In-Service

Smart Toolbox



Database Maintenance

Database maintenance has been expanded and moved to the ToolBox
Index process: It is now not necessary to Index daily. We suggest Indexing once a month routinely, or as required.

> Note: If you encounter an error, Smart will force user out of the programme, then the user must Index.

Recalculate Balances- all Patients (Smart must be closed). Recalculate current patient still located within SmartSeries (Maintenance Menu)
Check Data Integrity-Index's programme first for the user and then runs utility
Adjust Over/ Under- PMT BG

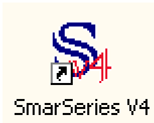
New Utilities

Import Fees
Import Ref Practitioner from either our Web site or College of Physicians and Surgeons
Import new Explanatory codes from MSP

> Note: YOU MUST BE USING WEB TRANSMIT to perform to use these utilities

Purge Data & Renumber Invoice numbers

SmartSeries Professional



New icon for SmartSeries Professional
For networks, each individual machine must have its own unique User ID.

New Database Tables & Pull-Down Menus

City & Province –Conversion of the most commonly used cities in your database, if there are spelling mistakes it is due to the original data entry done by the office.
Private Referrals
Account Group- Grouping practitioners by site for single databases
Patient relationships e.g. mom dad etc
Medication tables

Default Options

Account- default Insurer added
Item codes- default Item code
Patient Search
GST field
Fax number field
Web
Email

Search Methodology

Within any dialogue window that has a star (*), you can now click on the column header and search by typing directly into the column header with the criteria.
Example: In the patient list, you can search by last name, first name, alias, Birthdate, Phone #, Identity number or City, just by clicking on the header and typing in the information.

Interactive Messages

SmartSeries now provides prompts for certain functions which the user will have to read in order to proceed

OK and Cancel

Replaces Yes and No

Pop-Up Calendar

Double click on any date field and a calendar will pop up

3 Month Calendar

Mini Calendar- have to be using the daysheets

Short Cuts with Titles

Shortcuts have changed – Grouped by usage and modules
All short cuts have titles

Toolbars are movable

Referral Appointment Notification

Print from Shortcut

Account Options

Account Groupings
Default item code
Sort and print options
VCH tax codes for massage therapists earning over $30,000.00
ICBC Supplier number

Current Patient Window

Point and click search i.e. click on PHN number tab, type the number in without the # or *.
Patient Registration:

- New Dialogue window uses Tabs to move between demographic page, insurance page, health history etc.
- Additional fields added in demographic information section
- Demographics, Insurance information, health history, immunization records- all printable.

Referral Expiry date set for six months

Patient List Window

Search using columns with the star (*)
Search in descending order by clicking on the column header

- Birthdate Search: mddyyyy method. Enter numbers with no 0's, or slashes. Just enter the numbers directly. For example: January 1, 1945 is entered as 111945

Invoice List Window

New columns 'Ref by' and 'Ref to' don't have to bill separate invoice for a referral
Change of colour – red for outstanding invoices and white for paid
New tabs
Expanded Transaction history window
Original sequence # on rejections and electronic payments

Billing Checks

Smart checks for

- Item code & birth date
- Duplicate billing
- Time & location dependant if the itemcode is set for these dependencies

WCB Billing

Add as many WCB Insurances for different types of WCB billings
Second field in Patient WCB insurance for patient injury information in order to differentiate between wcb claims
Add Employer through patient insurance information

Checks and balances throughout the entire billing process
Billing of forms is done the same way as in V3

Auto Payment and Refund Tracking

Updates existing payments during rebilling process – The process updates the existing non-electronic payments to match the new information including the insurance and the account. Works the same for unposted and posted payments. Also prompts the user with a message to indicate that the payment has been updated.

Report Options

Shortcut Icon or Pull down menu
Grouped (tab) by functionality
Editable Deposit Report
Editable Unposted Batch
Account Grouping
Floating printer Icon
Rejection Report now has sequence number
GST Collected
Invoice report can run reports for item codes and diagnostic codes
Export to Excel or Text file with Smart Office Tools Module

Recalls

Print Labels
New alarm feature (this is set in Default options – Miscellaneous)

Queries

Easy to use new Customized report feature

Back Up

New Directory
SSV40

Notes: