Volume

1

TRIGRAM SOFTWARE LLC

AcuBase Live User Manual

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Chapter 1
Getting Started with AcuBase Live

Thank you for signing up with AcuBase Live. You will find that once you have successfully set up your practice, you will spend less time worrying about paperwork and IT issues and focus more time on your patients.

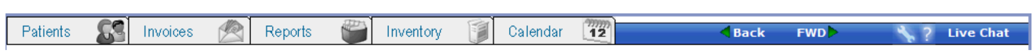
Logging in to AcuBase Live

Go to www.Trigram.com and in the upper left, click LOG IN.

You can also book mark https://acubase.trigram.com/ and it will lead you directly to the log in page, eliminating one step.

Getting Around in AcuBase Live

AcuBase Live has been designed to have a consistent, intuitive interface throughout, such that you may easily jump to the most relevant parts of the program at any time. The top of all screens have the same general navigation layout:



- Five main topic tabs, **Patients, Invoices, Reports, Inventory, and Calendar**.

  These are the main subject areas of the program and each has its own chapter in the User Manual.

- **Back** and **Forward** buttons at the top-right of each screen will move back and forward throughout previously viewed screens.

  Take Note: The Back and Forward buttons cannot go back and forward to records that have been deleted.

- The **Tool Wrench** or settings button will direct you to your preferences and settings.

- The **Live Chat** button is a link directly to our support team if you have any questions.

Below the main menu bar is your Account Box with your log-in information and access to your settings.

Click **my settings** to view your account information.

The **My Information** tab is your company's information that you provide for us. When you update this information, please click **submit** when finished,

The **Change Password** tab is self-explanatory, again, click **submit** when finished.

The **Payment Info** and **Account Management** tabs can only be accessed by the account owner through answering the challenge question set up at account inception..

Useful Tips

Entering data: Type the data directly into the field or select the data from a value list if the field is formatted to display values with a pop-up list, pop-up menu, check boxes or radio buttons.

To Move to a Field: Click in the field where you want to enter data, press Tab to move to the next field or press Shift+Tab to move to the previous field.

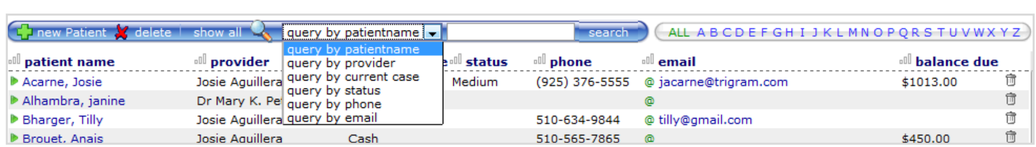
To Delete Records (patients, invoices etc):Select the record you want to delete by bringing it into voew on your screen. Click on the delete button at the top of the page.

BE ADVISED: When you delete a record, you are permanently discarding the data you entered in all the fields in that record. THERE IS NO WAY TO BRING BACK DELETED RECORDS!

To Find Records: Finding records, sometimes called a '**query**' is not limited in this system. At the top of your Patients, Invoices and Inventory screens there is an empty **search** box and a **query by** box. Decide how you would like to search, enter a letter or partial word into the empty search box and click **search**.

You can also use the **A-Z box** and choose a letter to search by patient last name or by product name under the inventory tab.

The Patient Screen with query box



Sorting records in List View is as easy as clicking on the headings of each column of date. Clicking once will arrange the data one way (alphabetical/ numerical) and clicking again will reverse the order.

Logging out of AcuBase Live: At the bottom of each screen you will find your Account Box and beside it is the **logout** button. Your account will be automatically logged out after 15 minutes of inactivity.

Now we will move on to setting your preferences.

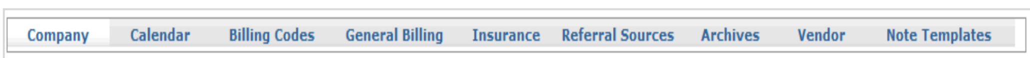
Chapter 2
Setting Your Preferences

The Settings section of AcuBase is the central repository of your preferences for the way your practice interacts with many different functions of the program.

The Tool Wrench

The Tool Wrench is located in the upper right corner of the screen, next to the '?'. When you click on it, you will notice several tabs across the screen. It is crucial that you take the time to set up your preferences and settings within the Tool Wrench before setting up your patients. Once you are actively using AcuBase Live, you may always return to The Tool Wrench from any screen.

The Preferences and Settings Bar under the Tool Wrech



The Company Tab

Company Setup

Upon clicking on the **Tool Wrench**, it will open the **Company Tab**. Enter your Company Information on the left side of the page – this info will reflect at the top left of your Superbills.

Provider Setup

Click on **New Provider** at the top and fill in all of the information.

Notice that some of the lines will tell you where this information will default on your CMS Form.

An unlimited number of providers/practitioners may be kept in AcuBase. Once you have added providers, their names will show up on the provider list. Each patient is assigned a provider and provider information entered here filters down into related invoices and reports.

When done click **Add New Provider** and you will return to the Company Tab.

When all of your information is entered, click on **Save Company Changes**.

Take Note:

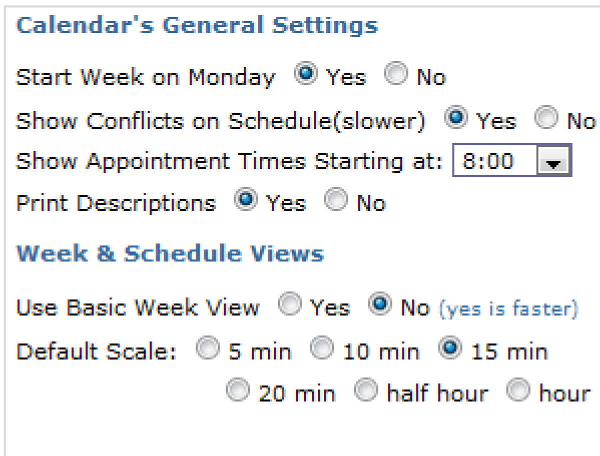
The ID Number field: select OB on first line and then type in your State License Number.

Options for line 33b: if an insurance carrier has a specific number for you to use enter it here. It will later be available as a drop down menu when establishing your patient's CMS.

You can always go back and Update your Provider Info and Add New Provider's as needed by clicking the green arrow.

The Calendar Tab

On the left side of the screen set up your **Calendar's General Settings**.



The **Auto Appointment Reminder** will send out an e-mail to your patient provided you have an e-mail address in their patient file

The **Online Schedule Link** is a great new feature where you can post the provided link on your website and have your patients schedule themselves online.

On the right side of the screen there are 3 additional tabs to set up: **Staff**, **Resources** and **Types & Colors**

Staff

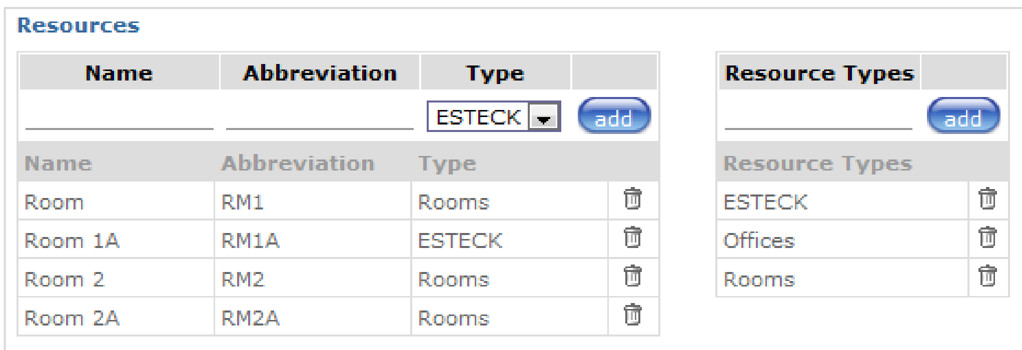
Here you will set your provider names, initials and their default appointment length. Add both providers and regular staff to this list. You may add as many staff as you like.

Each user of the the calendar is required to have unique initials that refer to them. The Calendar uses initials as Keys when filtering appointments.

Take Note: Later on, when using the calendar and scheduling a patient, a box with the provider's initials will be available to select and it will then assign an end time to your patient's appointment.

Resource

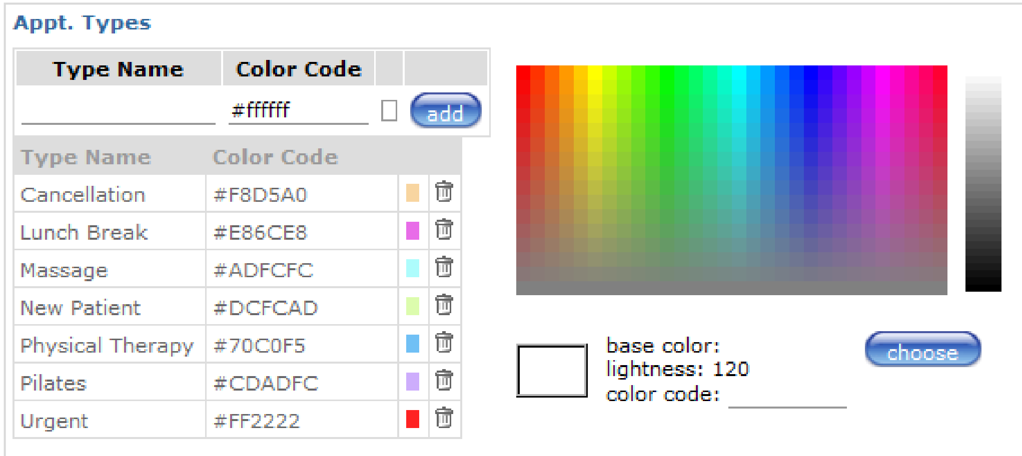
Resources may be set up as anything from a room to a provider, and are best assigned when multiple providers and/or multiple rooms are being schedules.



Under **Resource Type**, you would enter 'Rooms' and **Add**. Next under **Resources** (to the right), start setting up your rooms such as "Room 1/R1", and click **Add**.

Take Note: All resources will allow you to view one specific screen in our Calendar called the Schedule screen. On that screen, all resources will show across the top of the screen and it will allow you to see who is where at what time.

Types & Colors



This is where you will color code your appointments. Under **Type Name**, enter let's say New Patient or Physical Therapy and choose your color from the color wheel. When you have selected a color, click **choose** and then click **add** at the end of Type Name line.

Take Note: We suggest using lighter colors so that you will be able to read the text under it.

The Billing Codes Tab

This is where you will set up your CPT and ICD-9 codes. These are the lists that will pop up when using the Patient and Invoice sections of the program.

As a courtesy, AcuBase comes preloaded with current ICD-9 and many CPT codes, but it is your responsibility as a professional to make sure you code you billing correctly.

CPT Codes

Click **update now** in the upper right corner to select from the list the code you wish to import. You can search by code, code number or description (you can search on a string as well). When you find your code, simply click **import** and it will bring it over to your list.

Important! Once you have imported all the CPTs, assign a price and tax amount to each of them and click the little sheet of paper ( ) to save your prices. By clicking on the trash can it will delete the code.

ICD-9 Codes

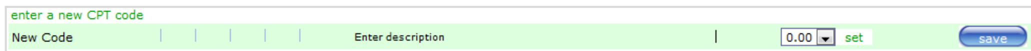
The process of entering is the same for CPT codes. Click on **update now** and select the codes you wish to import.

We recommend you search by the first 3 digits of the code. It will give you a wider range of choices. Also, you can change the description once you have imported the code to your list.

Manual Entry

CPT and ICD-9 codes can be entered manually as well. To do so, click on **new cpt** and a line (highlighted in green) will be provided to enter your code.

The New Code Line within the Billing Code List



You will notice a tax setting box on the line. Make sure to click **Set** (in green) to enter your tax rate. When finished, click **update** and close box.

After entering your code, description and price, click **save**.

Take note: It will not save the code unless a tax setting has been chosen (even though in most cases it will be 0.00).

You may choose to sort the codes alphabetically, by description or numerically by clicking on the field name at the top of the list.

The General Billing Tab

The General Billing settings relate to particular functions of the Invoices section of AcuBase.

E-Billing

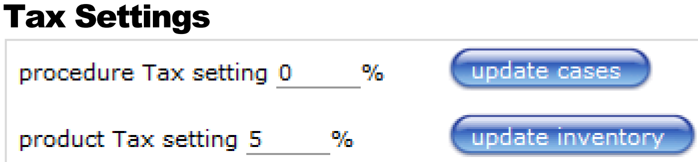
Electronic Billing is set to "No" by default. If you wish to use the e-billing feature of AcuBase, you must set this to "Yes" before it will be enabled.

Taker Note: Do not turn this on until you have set up all patients files and are ready to e-bill.

Billing Statement Footer

This option allows you to change the message that appears at the bottom of the invoice statements you may send to your patients.

Tax Settings



The **Procedure Tax** and **Products Tax** fields allow you to set up default tax amounts for products and services that you provide, which will show up in both the inventory database and on invoices, respectively.

Take Note: taxes on each product and service may be changed within each record as well.

Tax percentages must be entered as a whole number. For example, if your tax rate is 7.5%, enter 7.5 (not 0.075).

If the tax rate changes, simply enter the new rate and click the **update cases** or **update inventory** as necessary.

CMS 1500 Form, Box 24 & Superbill Auto-entry

Here you can pre-set line 24 of the CMS form with what information is most common to all patients. You will have the ability to customize the fields later in a patients file. Click **save** when finished.

Take Note: In order to view a drop down menu of your provider on the first line of box 24J (state license number), make sure a qualifier is set in box 24I (OB for state license).

The Insurance & Referral Source Tabs

The **Insurance** and **Referral Source** Tabs are places to enter commonly used insurance company and referral source information.

You can enter an unlimited number of companies and referrers, keeping this information current in one place so that it may be accurately auto-entered into the appropriate places in the Patient database.

Take Note: The data that you see when you first log in, are for demonstration purposes, please erase these sources by clicking the trash can at the end of each line.

Click on the **new company** or **new referral source** button to create a new record. Be sure to click the **save new insurance company** or **add new referral source** upon completion.

Take Note: You can sort the list by clicking on the headers of each column.

The Archives Tab

If any of your patients are no longer active, you can choose to archive them instead of deleting. Their record will no longer appear in the Patient area, and you can bring the patient back into the database at any time in the future.

On the left side of the Archive screen is an alphabetical list of all your current patients. **Check the box** beside the patient name you wish to archive and click **batch archive**. The patient will move to the right side of the screen under **Retrieve Archived Patient Records.**

To retrieve the patient from the archives, simply check the box beside the name under the **Retrieve Archived Patient Records** and click **batch retrieve**.

The Vendor Tab

The **Vendor** Tab allows you to keep a record of vendors/suppliers you may frequently use when ordering supplies which will be placed into the Inventory database (Inventory Tab).

You can have an unlimited number of vendors/suppliers. Any items in inventory associated with a given vendor will show up in a list under each company when you select that company to edit. The database comes pre-loaded with many of the most common Chinese Medicine vendors.

Click on **New Vendor** to create a new record. Once you enter the information click **save new vendor**.

You will notice on the vendor list that the email and web address of each vendor is highlighted. By clicking on these you will be directed to those places.

The Note Templates Tab

The **Note Templates** tab is where you can store SOAP notes, patient intakes or any other text associated to Notes regarding a patient. We have provided some samples. You can add, delete or change the text of the existing templates.

To create a new **Note Template**, click on **New Note Template**, name the template and you can enter text or copy/paste a word document into the box. When you are finished, click save note template changes.

This concludes your initial set-up of Preferences under the Tool Wrench. You are now ready to create your Patient Files.

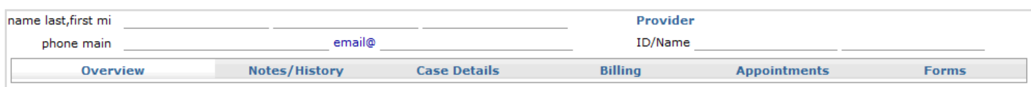
Chapter 3
Setting up Your Patient Files

The **Patients** tab is your home for all patient-related activity, from keeping track of patient contact information, to related billing activities and appointment data.

The Overview Tab

To create a new file, click **new patient**. You will be taken to the **Overview** screen for that patient.

The Patient File Menu Bar



Fill in the fields for the patient, making sure you assign a provider for the patient by selecting from the drop down menu in the **ID/Name field**.

One field to pay attention to is ID/SS no. This refers to the patient's insurance ID number that will default to box 1a of the CMS form.

Once you have filled out the fields, click **save new patient**. You will be brought back to the patient list.

The Notes/History Tab

This is where you can keep track of intakes, SOAP notes, and all other activity related to your patient. All activities are shown in list format in date order.

To create a new note, click **new note**. There is a list of templates in a drop down box. Choose the desired template and click **proceed**. You can also attach up to four pictures or documents to each note.

Once you have filled in the information click **save note changes**. Notes can be printed or duplicated.

The Case Detail Tab

The next tab is the **Case Detail** tab. Cases refer to the many possible ways a patient's billing is classified. One patient may have many cases. Each case represents a new way of billing for the same patient.

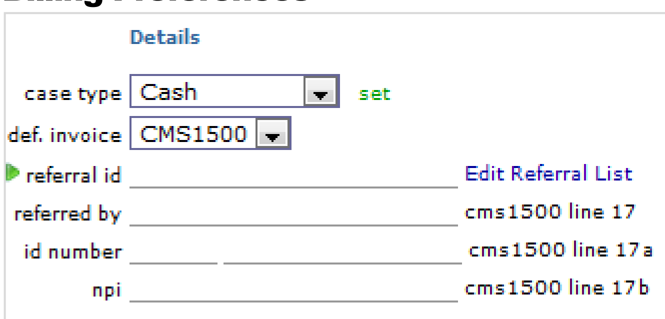
AcuBase allows you to keep multiple cases for the same patient, with up to three insurance companies for each case. The current, default case is the case currently being billed. Switch cases or create a new case in order to bill differently without losing the data or an older or pre-existing case.

Click **new case**.

The Case Detail Menu Bar

You will be brought to the **Billing Preferences** tab.

Billing Preferences



First you will set your **case type**. You will have a drop down menu to choose from.

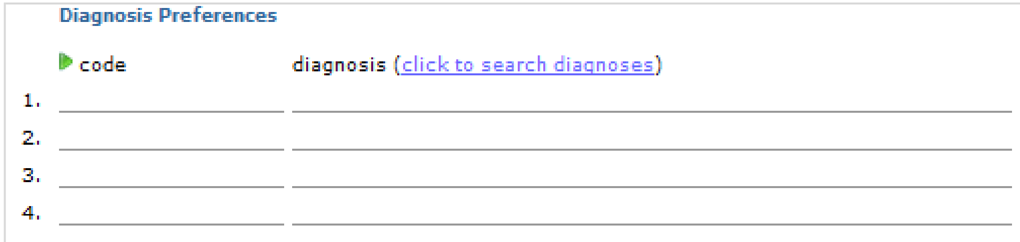
Establishing a **case type** is for your own personal information, you can manage it however you like.

*Take note: Clicking **set** to the right of the drop down box will allow you to add, remove or update the Case Type Settings.*

Next you will establish your default invoice for the patient. This can always be changed later in the Invoice tab.

If there is a referral physician, click on **referral ID**. If you double click the space a drop down menu will appear with your referrals you entered under the tool wrench.

Next you will select the patient's ICD-9s under the Diagnosis Preferences.



You will notice that the CPT codes you set up in the **General Billing** tab come across to the case. You can choose up to four diagnoses.

Next you will fill out the default CMS 1500 Form Box 24 (Procedures).

Once you have set up billing preferences for this case, AcuBase will automatically use these default entries in order to do your invoice data entry for you. These fields will auto-fill with data from the General Billing tab in the Settings for the program, and can be changed here for an individual patients case, and/or an individual invoice as you see fit.

Information entered here in boxes D and F will also flow through to Superbills.

When finished entering the information click **save case changes**.

Take Note: When clicking in line 24J, you will see a list of providers to choose from. Upon selecting your provider, the top line will fill with the provider's stat license and the bottom line with the provider's NPI. These fields only need to be filled in case the rendering provider is not the same as provider in box 33.

For cash patients you are done in terms of settings.

For insurance patients there is more to consider.

Insurance/Payer Tabs (1-3)

The Insurance tabs allow you to enter up to three insurance companies or other types of payor for each case. In some cases, a patient may have multiple payors (primary, secondary, tertiary) for a given case. By default, AcuBase assumes you wish to pay the primary payor and brings you to the **Insurance/Payor 1** tab. To choose the secondary or tertiary, click on the **Insurance/Payor 2** or **Insurance/Payor 3** tab to enter the information.

The Billing Preference Tab

Upon clicking the insurance tab, you will be on the **CMS template** for that patient's case. Many of the fields will be filled in already. Take time to check the fields and add information where it is needed. The fields in pink are editable.

Once finished, click on the **contact** tab next to the **CMS Forms Prefs** tab. This contains basic information about the insurance company or payor. Click the **company id** line and a drop down menu of the Insurance companies you entered in the settings and preferences will appear.

Take Note: If you do not see the company, you can return to the wrench and enter it there for future patients, or enter the information in the spaces provided, but it will not save for later use.

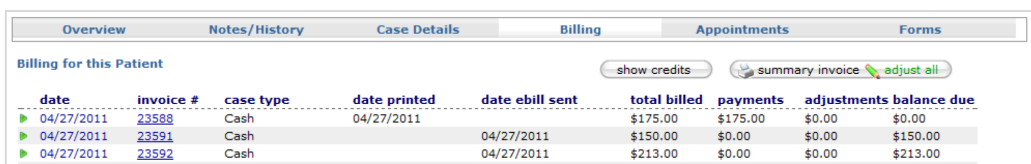
Below the Payor information is the Company/Payor Verification section where you may enter approved dates, percentage paid, deductible information, etc. for each payor.

When finished, click **save case changes**.

The Billing Tab

This screen is essentially a summary list of all patients invoices, sorted by most recent date.

The Billing tab menu bar



A summary invoice can be printed from this screen. Clicking on any of these invoices will take you to the **Overview** screen for that invoice. The sum of all outstanding invoices is seen at the bottom of the screen.

The Appointments Tab

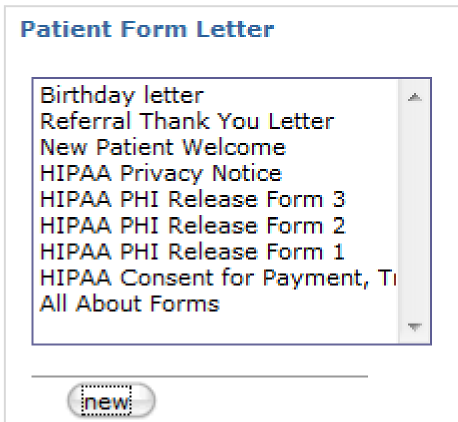
This tab will show you a history of your patient's appointments. New appointments can be created from this screen by clicking on the **new appointment** button. (We will go into further detail about creating appointments in the Calendar section).

Take Note: the trash can icon on the far right side of each appointment line allows you to quickly delete and appointment.

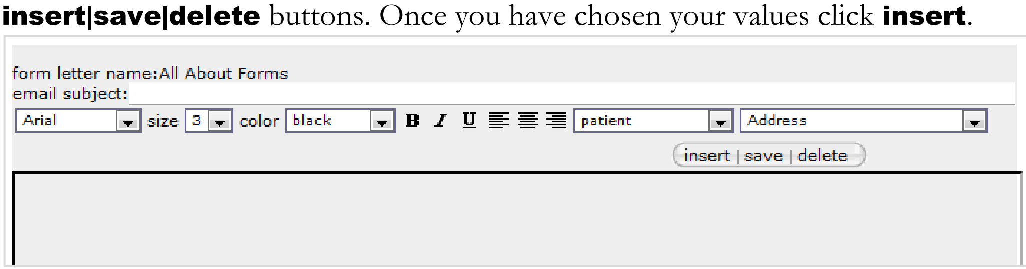
The Forms Tab

Here you can store Forms or letters you wish to e-mail or print for your patients. Various fields can be inserted into your text that will auto-populate your letter with today's date, the patients name, Company name, etc.

To create a form type in the name of your form or letter on the line above the **new** button on the left side of the screen. Then, double click **new** to add it to your list. Once you have added the name you can type in your text and/or copy and paste from a word document.



To insert fields, click your curser where you would like to have the field, choose what you would like to insert from the two drop down menu boxes above the **insert|save|delete** buttons. Once you have chosen your values click **insert**.



When you are satisfied with your letter click **save**. You can then choose to **preview, send e-mail or download pdf** at the bottom of the screen.

Take Note: this section is currently under development.

Chapter 4
Creating an Invoice

Invoices can be created from two areas of AcuBase: the Patients tab or the Invoice tab. The Invoices tab is home to all invoice and payment related activity.

Creating an Invoice from the Patient Tab

When clicking on any of the tabs across your patient's file, you will see the **new invoice** button above the patient's name. When you click **new invoice**, a box will pop up asking for the treatment date. Clicking on the treatment/procedure date field will bring up a calendar for you to choose the date from. You will be taken to the patient's default invoice. Notice here that you will also be switched to the **Invoices** tab.

Creating an Invoice from the Invoices Tab

Clicking on the **Invoices** tab will allow you to create a blank invoice not attached to a patient file. This is useful if you have a walk-in customer who is buying a product.

Click the **Invoices** tab, you will be brought to the **Overview** screen of that invoice. Here you can enter the person's name and perhaps select the provider that is selling the product. Click on the **Superbill** view of the invoice and select the product by clicking the description field and choosing from the drop down menu. Click **save invoice changes** when finished.

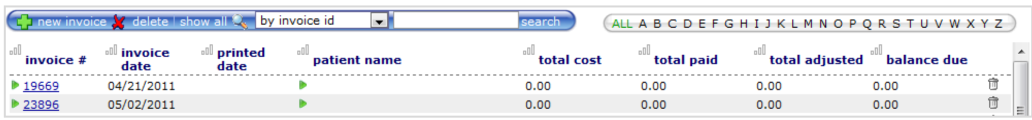
You can also create an invoice for an existing patient. When you click on the patient id field, a drop down menu of you patient list will appear. All of their billing preferences from their current default case will auto-populate.

Take Note: When creating an invoice from this tab, today's date will automatically default, but can be changed.

Viewing the Invoice List

Upon clicking the **Invoices** tab, you are sent to a List View with all invoices in descending order (most recent first). You may show and sort the records viewed on the screen by clicking on the **A-Z buttons** at the top of the screen or by clicking on the column heading to sort by that heading.

The Invoice Screen

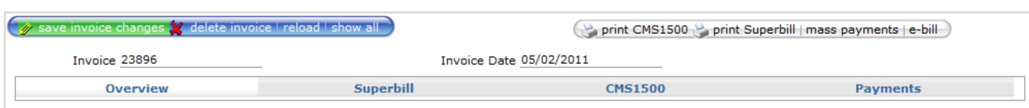


Take Note: Clicking on the underlined invoice number will bring you to the invoice. Clicking on the patient name will bring you to the patient screen in the Patients tab.

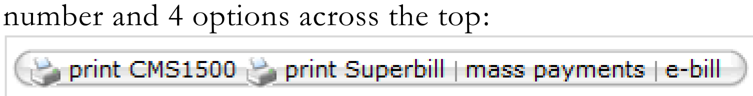
Viewing an Invoice

When looking at an individual invoice, many options are available. A grey bar across the top gives you the option of viewing the **Overview, Superbill, CMS1500 and Payments**. When you click on a patient's invoice you will be taken to the **Overview** tab by default.

The Invoice Menu Bar



Each invoice detail screen for the 4 tabs will have the patient's name, invoice number and 4 options across the top:



Print CMS 1500 will print the current invoice into a CMS 1500 form. You must load your printer with pre-printed CMS forms.

Print Superbill will print the current invoice into a superbill.

Mass payments will take you to the Mass Payments Entry screen, where you apply line-item payments to any invoice without having to go directly to each invoice's Payment Entry section.

E-bill allows you to create a new electronic billing batch. Once enough invoices have been created and you are ready to submit a batch, click **e-bill** and it will generate a text file on your desktop. If you are on a PC, the file generated will be zipped. This is the file you will upload to your clearinghouse of choice.

Take Note: once you decide that you are ready to start e-billing, you must go to the tool wrench, click General Billing and turn e-billing on.

Once you click on the e-batch button, a pop-up box will ask you if you want to send all of the invoices in the queue to batch. If you click cancel, you will get a second pop-up box asking if you want to only send that one invoice you have chosen.

The Overview Tab

When you open an invoice from the **Invoices** tab, you will be directed to the **Overview** screen. Changes can be made here for that particular invoice. If any changes need to be made, make sure you click **save invoice changes** when finished.

Take Note: There are two boxes for comments on this screen. Printed comments will print on the Superbill, general comments will not.

The Superbill Tab

This is an overview screen of your Superbill for the invoice. This is where you can add products to be billed. Click under the description to see a list of your products to choose from. It automatically assigns a quantity of 1, so make sure to adjust as needed.

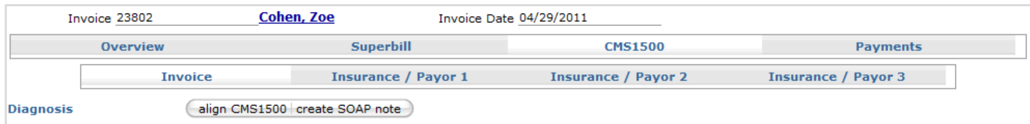
Take note: Amounts for each item must be consistent with the measurements in your inventory database. For example, if you buy an herb by the pound, and then sell the herb to the patient, it is assumed that you are selling it by the pound.

You can also modify the ICD-9 and CPT codes on this screen as well. When finished click **save invoice changes**.

The CMS 1500 Tab

This is where you enter information to go on the CMS form. You will notice that is has several sub-tabs; **Invoice, Insurance/Payor1, Insurance/Payor2 and Insurance/Payor3**.

The CMS1500 tab



If you click on any of these, it will look the same as your CMS template for that patient (under their Case Detail tab). *However, this view is specific to that invoice*. Making any changes here will only change the information for that particular invoice. If you need to make permanent changes to a patient, it must be done under the **Patients Case Detail tab/Insurance tab or Payor tab**.

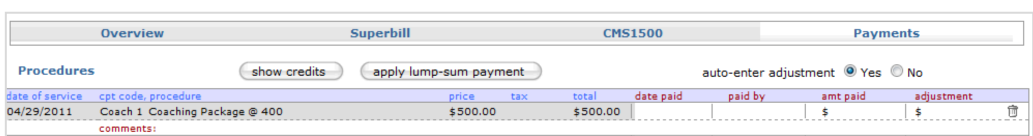
If any changes are made on this screen, click **save invoice changes**.

You will also notice at the top of the screen an **align CMS1500** and **create SOAP note** button. Here you can access and create notes for the patient and align your CMS form printing as needed.

The Payments Tab

This is where you will be record payments related to that invoice. Clicking on the Payments tab brings you to the Apply Payments screen.

The Payment Menu Bar



There are several ways to apply payments:

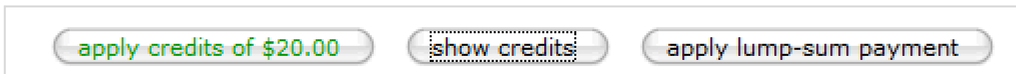
1. Manually enter the date and payments for each line item by clicking in the fields. Clicking on the **date paid** field will bring up a calendar to choose a date of payment. Clicking on **paid by** will bring up a box with payment options.

Take note: you can edit the box by scrolling to the bottom and clicking edit.

You can then enter the **amount paid** and any **adjustments**. The **comments** field is available for every line and you can place comments related to that line item.

2. Use the apply **lump-sum payment** button for invoices that get paid entirely the day of visit. Simply click on the button and you will be prompted to enter the **Date Paid** and **Paid By**. The program will then assign the date and payment to all lines of the invoice.

3. The **show credits** button is used when patients pay a lump sum for several treatments. Click **show credits** and enter the amount purchased. Click **ADD**. All invoices with outstanding balances will reflect a button at the top of the screen with the amount of credit available.

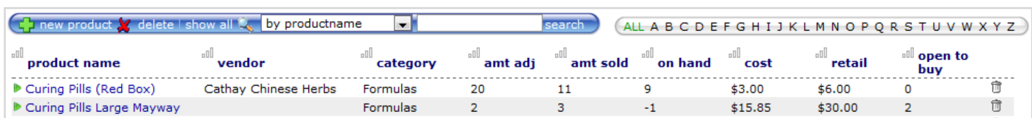
   Click the **apply credits** button to apply payments from the credit button to the invoice.

   ***Take Note: If you decide to delete the invoice, make sure you delete the credit first (click on the trash can at the end of the line item) before deleting the invoice. This will re-credit the account*.**

Chapter 5
Using the Inventory Tab

The **Inventory** tab is where you go to view all inventory-related information for your practice. Upon clicking **Inventory**, you are taken to the List View of your Inventory database. At this point, all of the items are presented in order of their product names.

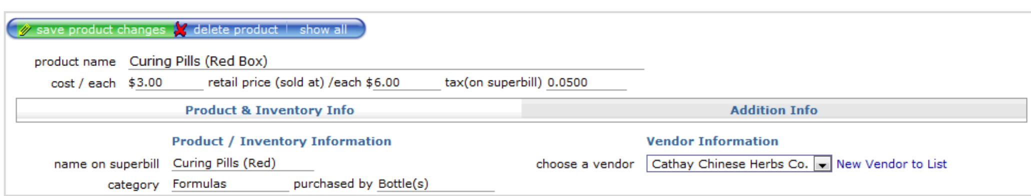
Each screen in Inventory has the same buttons on top, **new product, delete, show all** and a **search** function.



The Inventory Screen

When you first click on the Inventory tab, you will be brought to the Inventory List (List View). You can return to this screen by clicking **show all** from the new product screen. This list is sorted by **product name**, but can choose to sort any of the fields by clicking on the field name. To view the inventory item details, click on the blue name from the list.

Take Note: You can delete a record in list view by clicking on the trash can at the end of the line item.



The Individual Inventory Screen

There are two tabs for each item: **Product & Inventory Info** and **Additional Information**. The **Product & Inventory** tab shows by default and gives you the most information including vendor information. Under the **Additional Info** tab you can add photos and files.

To Enter a New Product

Click on the **new product** tab and enter your product information.

The **cost/each** field is the cost that you buy this item, **retail price (sold at)/each** is the amount that you charge for this item. **Name on Superbill** will be the product name in most cases, this is what will appear on your drop down menu from the Superbill view.

Don't forget to select a vendor from the **choose a vendor** field.

Take Note: If a vendor cannot be found, you must enter it under the tool wrench/vendor tab.

Click **save new product** when finished. The program will keep take care of deducting items as they are purchased.

Once your new product is saved, you can return to the product and you will see a new **Adjustment/Purchased by the Clinic** box.

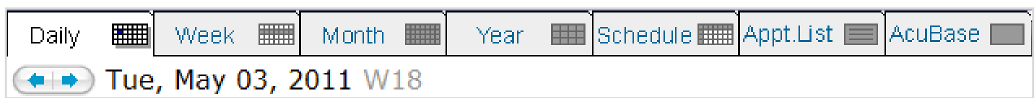
Enter how many of this product you have on hand, the comment box can be whatever you wish and then enter the date when you received it. Clicking the **green arrow** will bring up a calendar. Click **save product changes** when finished.

Take Note: Make sure the unit in which you have entered your product is also the unti in which you will sell it. For example: If you purchase loose herbs and will sell by the ounce, make sure to select ounces under purchased by field.

Chapter 6
Using the Calendar

Upon clicking the **Calendar** Tab, you will be taken directly to the **Daily View** for the current day, with all appointments listed in order of time. You will notice that the top of the Calendar screen is different from the rest of AcuBase. Clicking on the **AcuBase** tab will return you to the main AcuBase program at any time. When you click back to the **Calendar** tab, you will be returned to the last calendar screen you were on.

The Calendar Tab View



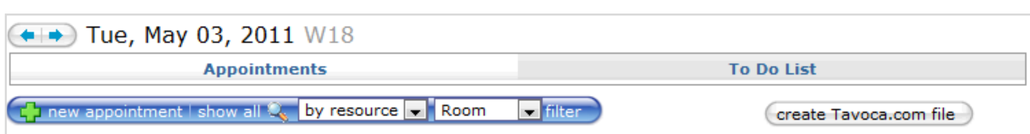
Take Note: Settings for the Calendar are found on the Calendar tab under the Tool Wrench.

On most screens, to the left you will see a mini calendar of the most recent past, current and next month. You can click on any of the days and be taken directly to the Daily view of that day. Above the months, there is **go to today** and **select day** button. Clicking on the select day button will pop up a calendar to choose any given day.

The Daily View Tab

This screen shows the most detail of any in the calendar screen, including date, start/end time, staff initials, title, resource and type.

Daily view tabs



To Create a New Appointment

Click on the **new appointment** button. From here, click **select patient** and type in the first letter(s) of the patient's last name and a list will appear to choose from. Select the patient and click **continue**.

Take Note: In this screen, you can also choose to create a new patient.

Select a **beginning time** for your appointment and the **provider initials** (these were pre-set in the calendar settings under the tool wrench). This will assign an end time to the appointment based on the provider's appointment length.

Resource: This field refers to the resources you have set up on the Calendar settings. These are useful when viewing the Schedule tab.

Title & Description: These fields can be used to write more detail about the appointment. The Description will not reflect in the Daily view, but a sheet of paper icon will appear in the upper right corner of the Title field and will indicate that you have a description for that appointment.

Type: The Type was set up in your Calendar settings and is color coded.

Click **save new appointment** when finished.

Creating Repeating Appointments

If you wish to make a certain appointment repeating, the Calendar allows you to do so quickly and easily. When creating a new appointment (see above) click on the small repeating (yes) box. This will bring up the Repeating Set window.

The Repeating Set window

By default, the first tab is set to Daily, but can be changed. Each tab will bring up different options to choose from. You can set the appointment to stop after a specific number of repetitions or on a specific date in each tab. Once you have made your selection click save appointment.

Take Note: You may delete individual appointments once they have been created without affecting other repeating appointments.

To Do List tab: This tab shows a list of **To Do** items in date order (oldest first). Items that have not been completed appear in red, completed items in black. Clicking on the title will bring you to the item. Clicking on the trash can icon at the end of the line will delete the item.

To create a new item click **new to do**. You then enter a title, description, dates and assigned to. Click **add to do** when finished.

Useful Tips:

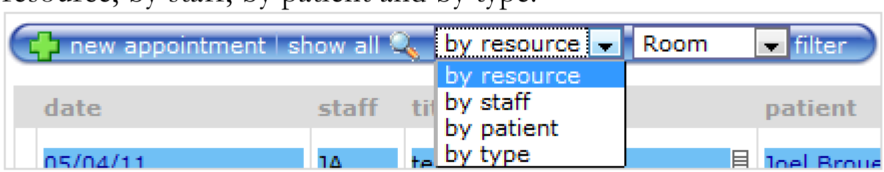
From the **Daily** view, appointments can be edited by clicking on the date.

Clicking on the patient's **e-mail address** will allow you to send an e-mail to the patient.

Clicking on the **patient's name** will bring you to their patient file.

Appointments can be filtered using the **filter** buttons. You can filter by resource, by staff, by patient and by type.

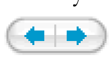
The search field found on all calendar views



Select the filter, how you would like to filter (a drop down will appear in the box to the right) and click **filter**. This function is located on each view.

There are arrow **buttons** on the top of each view, beside the date that will allow you to scroll through the days, weeks or months.

The arrow buttons

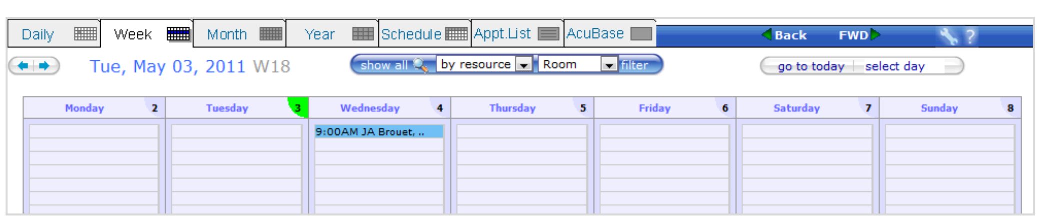


There is a **print** button on the bottom of the daily screen that will print a list of your appointments for the day.

The Week View Tab

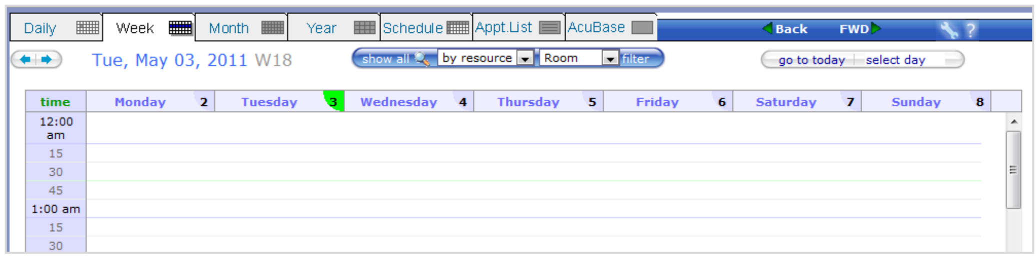
Clicking on the **Week** tab will take you to the week view for whichever day is selected in Daily view. This view can be set in two ways, which is determined under your **Calendar** settings (under the **Tool Wrench**).

The Basic Week View:

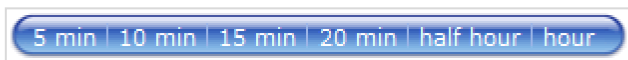


The Basic view is faster than the non-Basic view, but is less specific.

The non-Basic View:



This view shows specific time slots for each appointment. At the bottom of the screen there is a button that will allow you to change the time increments of this view.



You can schedule an appointment from either view by clicking in the desired day and time slot. A date and beginning time will be automatically assigned to your appointment based on your choice.

The Month View Tab

Clicking on the **Month** tab will take you to the month view of whichever day is selected in **Daily** View. If today is the selected month, it will be highlighted in yellow. If your current date selected in the Daily view is not today, it will show up in green.

To create an **Appointment** from the month view screen, click on the **number portion** of the day. This will bring you to the **Appointment** screen and you can click **new appointment**.

There is also the option of viewing your **to do** list in this view. Below the date at the top right of the screen, are two tabs, **appointment** and **to do**. Click the view you desire.

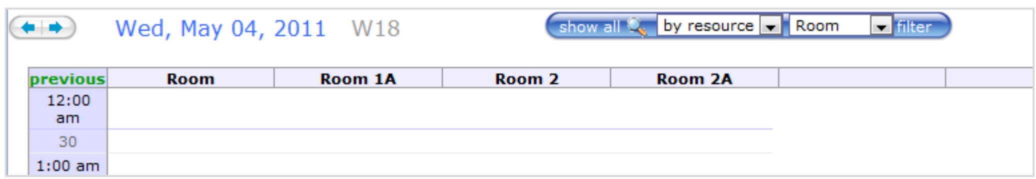
The Year View Tab

Clicking on the **Year** tab will take you to the year view for whichever day is selected. Click on any month to go to the Month view.

The Schedule View Tab

Clicking on the **Schedule** tab will take you to a Schedule view for the selected day. This screen is a great feature for medical offices and is designed to look like a standard medical booking daily schedule. For anyone with multiple rooms or other resources you choose to set, this is the most often used screen.

Across the top you will see the **Resources** that you set up in the **Calendar settings**, under the Tool Wrench. (In our example, the resources are rooms).



The appointment times down the left side are set up in your **Calendar** preferences, but can be changed on the fly at the bottom of the screen.

To **add an appointment**, click on a time slot under the specific resource and you will be directed to the appointment screen.

Clicking on an appointment in the list will bring up the appointment details.

The Appointment List Tab

Clicking on the **Appointment** tab will bring you to a complete list of your appointments in greater detail. Clicking on any **blue text** will direct you to even greater detail. There is also the option to **delete** an appointment by clicking on the trash can icon at the end of the line.

You can sort your Appointments by resource, staff, patient, type or date from the search box at the top of the screen.