ArcBITS Newsletter

ArcSys Hot Tip

If you want to see some good examples of on-line forms, go to the web site

slmc2.myupdox.com

and click on the Forms button. Setting up these forms is easy. The Patient Registration took about 30 minutes and the Patient History about an hour. (Remember, you can look, fill out, but <u>don't</u> Submit.)

In 45 Minutes

It may sound hard to believe, but it only takes 45 minutes to setup Red Planet in order for you to send your first batch of appointment reminders to Updox. Forty-five minutes. That's it. Now, there is some setup that ArcSys does in getting things installed on your server and adding options to your menus. But once that is done, you're looking at 45 minutes on your side.

Step 1: On your Setup menu there is an option to perform what is known as an Updox Single Signon. This logs you into your account on the Updox server. At the top of your Updox menu is an option called Menu. Click that and then choose Admin. On the left side you will see a choice labeled Reminders. Under that you will see a choice labeled Scripts. There are pre-defined scripts for voice, email and text messages. You can test each to see/hear what their content is like. You can even customize the scripts to your liking! We recommend choosing 9588 email, 13699 for text and 13492 for voice.

Step 2: Decide how each patient will get contacted. ArcSys will have set up a new field on your patient registration screen called Confidential. This will have a choice of EMAIL, TEXT or PHONE. You can choose to slowly populate this field as your patients come in for new visits. Or, ArcSys can *pre-populate* this field to your specifications. We do this by taking everyone with a Cell phone and plugging the field with TEXT. Those who are leftover and have an Email will get plugged with EMAIL. Finally, those who are leftover and have a Phone will get plugged with PHONE.

Step 3: From your Appointment Scheduling menu choose the option to Send Appointments to Updox. The above screen will appear. Fill in the fields as appropriate and click Ok. The messages will be sent almost instantaneously.

Step 4: Do your happy dance!
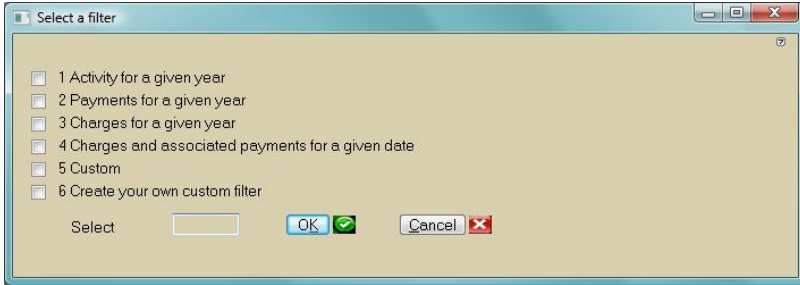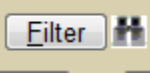
Now That You Know (Part 2)

A filter is a very handy mechanism to narrow the amount of data being displayed. It is particularly helpful on patient accounts with huge numbers of transactions in the Txall list display. The Filter button is displayed just to the right of the Sort button at the bottom of the list. Clicking on this button will result in a pop-up window displaying the list of available filters.

Filter

Select a filter
- 1 Activity for a given year
- 2 Payments for a given year
- 3 Charges for a given year
- 4 Charges and associated payments for a given date
- 5 Custom
- 6 Create your own custom filter
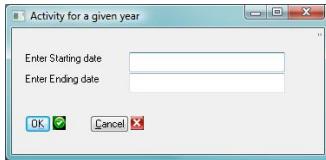
Select [ ] OK Cancel

In this filter, the top four entries are standard filters which have been designed to meet the needs of a specific practice. The Custom filter will bring up a screen where you can enter a "one time" filter to comb for specific data. The Create your own custom filter allows each user to make their own copy of the standard filter and will be the primary focus of this article.
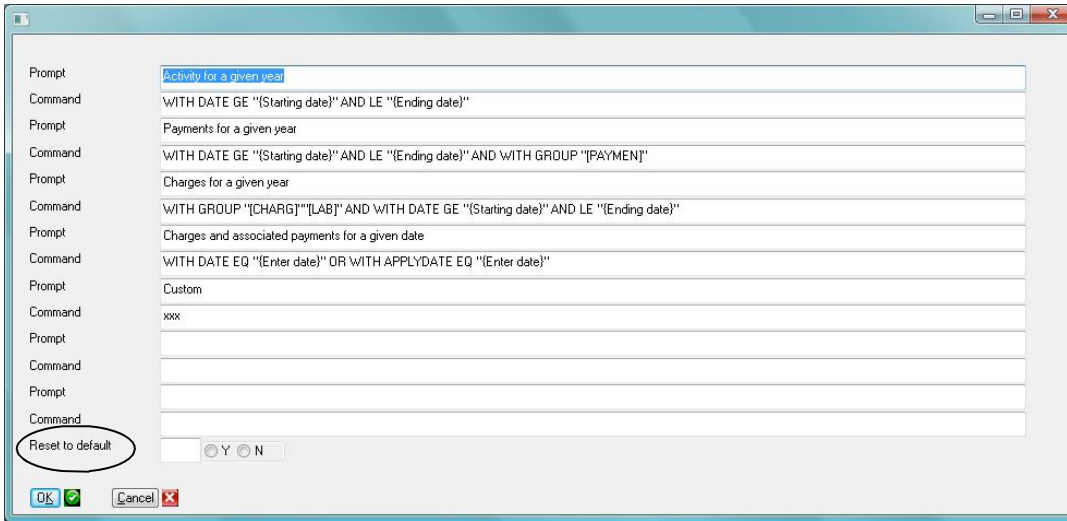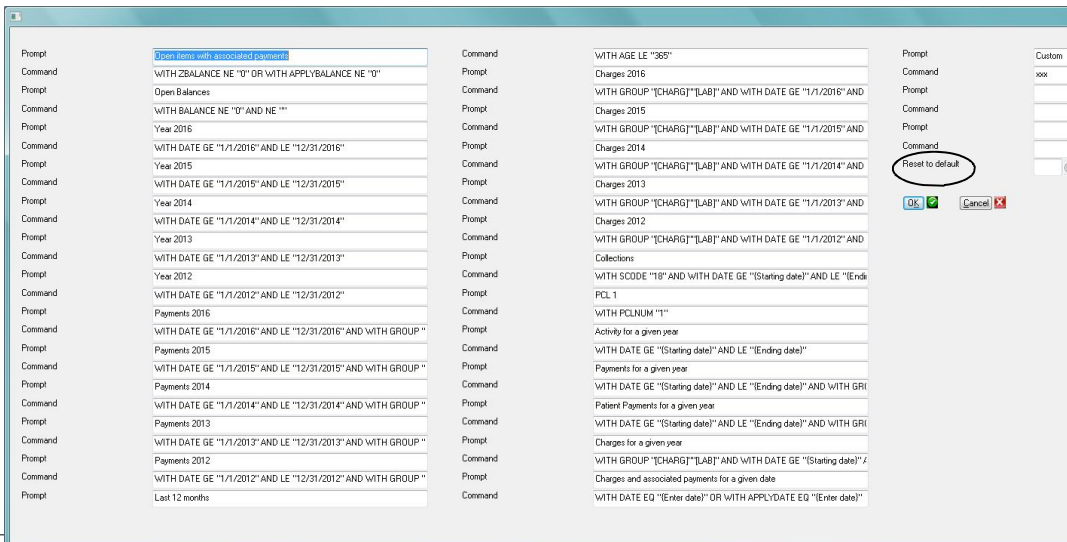
The screen at left is what will appear. Each filter is composed of a Prompt (self explanatory) and a Command (kind of complex). The commands are composed of Mvbase instructions which allow for field selection. They are always in upper case. You primarily use the phrase AND WITH when you including more than one thing you are searching. The text shown in braces { } becomes a prompt when the filter is invoked. If you include *** as part of the Prompt, then that entry will be defined as your *default filter and will automatically be invoked* when the list is displayed. Shown below left is another filter for you to study. (As a side bar, when January rolls around, the years shown in this filter will get *automatically updated*. That is, any filter which had 2016 will get updated to say 2017, 2015 will change to 2016 and so forth.) In the event you've screwed up your filter, click on Y in the **Reset to default** (see circles) field and you will go back to the standard filter.

Filter screen (left):

Prompt	Activity for a given year
Command	WITH DATE GE ''{Starting date}'' AND LE ''{Ending date}''
Prompt	Payments for a given year
Command	WITH DATE GE ''{Starting date}'' AND LE ''{Ending date}'' AND WITH GROUP ''[PAYMEN]''
Prompt	Charges for a given year
Command	WITH GROUP ''[CHARG]''''[LAB]'' AND WITH DATE GE ''{Starting date}'' AND LE ''{Ending date}''
Prompt	Charges and associated payments for a given date
Command	WITH DATE EQ ''{Enter date}'' OR WITH APPLYDATE EQ ''{Enter date}''
Prompt	Custom
Command	xxx
Prompt	
Command	
Prompt	
Command	

Reset to default ○ Y ○ N

OK Cancel

Activity for a given year

Enter Starting date [ ]
Enter Ending date [ ]

OK Cancel

Lower filter screen:

Prompt	Open items with associated payments
Command	WITH ZBALANCE NE "0" OR WITH APPLYBALANCE NE "0"
Prompt	Open Balances
Command	WITH BALANCE NE "0" AND NE ""
Prompt	Year 2016
Command	WITH DATE GE "1/1/2016" AND LE "12/31/2016"
Prompt	Year 2015
Command	WITH DATE GE "1/1/2015" AND LE "12/31/2015"
Prompt	Year 2014
Command	WITH DATE GE "1/1/2014" AND LE "12/31/2014"
Prompt	Year 2013
Command	WITH DATE GE "1/1/2013" AND LE "12/31/2013"
Prompt	Year 2012
Command	WITH DATE GE "1/1/2012" AND LE "12/31/2012"
Prompt	Payments 2016
Command	WITH DATE GE "1/1/2016" AND LE "12/31/2016" AND WITH GROUP ''
Prompt	Payments 2015
Command	WITH DATE GE "1/1/2015" AND LE "12/31/2015" AND WITH GROUP ''
Prompt	Payments 2014
Command	WITH DATE GE "1/1/2014" AND LE "12/31/2014" AND WITH GROUP ''
Prompt	Payments 2013
Command	WITH DATE GE "1/1/2013" AND LE "12/31/2013" AND WITH GROUP ''
Prompt	Payments 2012
Command	WITH DATE GE "1/1/2012" AND LE "12/31/2012" AND WITH GROUP ''
Prompt	Last 12 months

Command	WITH AGE LE ''365''
Prompt	Charges 2016
Command	WITH GROUP ''[CHARG]''''[LAB]'' AND WITH DATE GE "1/1/2016" AND
Prompt	Charges 2015
Command	WITH GROUP ''[CHARG]''''[LAB]'' AND WITH DATE GE "1/1/2015" AND
Prompt	Charges 2014
Command	WITH GROUP ''[CHARG]''''[LAB]'' AND WITH DATE GE "1/1/2014" AND
Prompt	Charges 2013
Command	WITH GROUP ''[CHARG]''''[LAB]'' AND WITH DATE GE ''1/1/2013'' AND
Prompt	Charges 2012
Command	WITH GROUP ''[CHARG]''''[LAB]'' AND WITH DATE GE ''1/1/2012'' AND
Prompt	Collections
Command	WITH SCODE ''18'' AND WITH DATE GE ''{Starting date}'' AND LE ''{Endi
Prompt	PCL 1
Command	WITH PCLNUM ''1''
Prompt	Activity for a given year
Command	WITH DATE GE ''{Starting date}'' AND LE ''{Ending date}''
Prompt	Payments for a given year
Command	WITH DATE GE ''{Starting date}'' AND LE ''{Ending date}'' AND WITH GR
Prompt	Patient Payments for a given year
Command	WITH DATE GE ''{Starting date}'' AND LE ''{Ending date}'' AND WITH GR
Prompt	Charges for a given year
Command	WITH GROUP ''[CHARG]''''[LAB]'' AND WITH DATE GE ''{Starting date}'' A
Prompt	Charges and associated payments for a given date
Command	WITH DATE EQ ''{Enter date}'' OR WITH APPLYDATE EQ ''{Enter date}''

Prompt	Custom
Command	xxx
Prompt	
Command	

Reset to default ○ Y

OK Cancel