System Overview

Functions and Features

The e-Medsys product is a completely integrated Web-enabled practice management system that provides the following functions:

Data Security

In addition to firewalls and password security, e-Medsys encrypts all data to prevent unauthorized access to confidential information.

User-Defined Privileges

e-Medsys allows you to define roles for the various levels of personnel in your practice and then assign which tasks each of these roles are allowed to perform. Thus a "secretary" might be able to use inquiry where an "administrative clerk" might be allowed to change but not delete data. The "manager" would be allowed to do everything.

Default Home Page

Users may select the default screen that will appear when the application first opens. Click on File => Keyboard Shortcuts.
Highlight the Menu Item you would like to set as your default, then click Set Home Page.

**Speed-Keys**

While e-Medsys provides easy navigation by simply clicking the buttons with the mouse, the system also allows data entry without a mouse. Rather than clicking a button with the mouse, you can hold down the Alt key and type the letter underlined on the button. For example with Accept, holding down the Alt key and typing an "a" will activate that button.

**Keyboard Shortcuts**

**Default key combinations:**

- Ctrl-P = Patient Registration
- Ctrl-I = Inquiry
- Ctrl-B = Bookings
- Ctrl-H = Charge Posting
- Ctrl-R = Credit Posting
- Ctrl-D = Daysheet
- Ctrl-G = Report Generator

The screen will display a table of all menu items that the user has permission to access. To change or set the keyboard shortcut, select the item from the table and then either double-click on it or select the Modify button from the button bar. A small window will open up allowing you to enter in a key combination.
Keyboard Shortcuts can include any of the following:

1. Function Key (F1-F12)
2. CTRL+<Number>
3. CTRL+<Letter>
4. CTRL+Function Key
5. CTRL+SHIFT+Function Key
6. CTRL+ALT+Function Key

Exclusions: CTRL+A, CTRL+C, CTRL+V, CTRL+X, CTRL+Z, ALT+<any key>

If the key combination does not appear, it is not an allowed key combination. Once you have selected a valid key combination, it will appear in the field on the screen. Select Save or Exit to exit the window.

Enter Key as Tab Key

Many data entry users prefer to use the keyboard Enter key to go from field to field on a screen. e-Medsys allows the use of either the Enter key or Tab key to proceed from one field to another. You can, of course, also use the mouse.

Scrolling through Tabs

In various screens there are tabs that allow the user to access different areas of information within a certain module. As an example, in Credit Posting there are several tabs the user may want to access during the posting process. By holding down the keyboard Alt key and pressing either the left or right arrow keys, the system will advance through each tab.

Concurrent Windows

The system allows you to move from screen to screen without closing the window that you are currently using. Merely click the program function that you want to perform and the task you were using will stay open on a window behind the new task.

When you are finished with the new task, your old one will still be waiting for you. To navigate among open concurrent windows, click the Windows Button at the top of the screen.
The active tasks will appear. You can select the desired window from this list of tasks. You can also switch back and forth between open windows by using the keyboard combination Ctrl and Tab.

**Look-up Item by Name**

Almost any item in e-Medsys can be searched for by name. These items include procedures, diagnoses, insurance plans, etc. To search for an item, type in the first few characters. The system will bring up all items matching that character string. Thus, typing in "BRON" in a diagnosis look-up would bring BRONCHIECTASIS, BRONCHITIS NOS AND BRONCHOPNEUMONIA.

The % character is used as a wild card. To find an item containing a character string, type in a few characters preceded by the character "%" and the system will bring up all items that contain that character string. Thus, typing in "%BRON" for a diagnosis look-up will bring up any diagnosis containing that string, such as BRONCHIECTASIS, CHRONIC BRONCHITIS, etc. Typing in just the % character will bring all items in the list to the screen.

**Entering Dates**

Date fields are pre-formatted as MM/DD/20YY (or MM/DD/19YY for the DOB field). Key in the date without putting in punctuation or the century. Thus keying 122310 will result in 12/23/2010. Remember to use a preceding "0" for a single digit month. January 25, 2011 would be 012511, not 12511.

The letter “t” can be typed in any date field to have the system fill in today’s date. Typing “3d” in a date field will fill in the date three days from today. Typing “2w” will advance the date by two weeks. Typing “3m” will advance the date by three months. To enter a date 3 days prior to today’s date, type “-3d”. To enter a date two weeks prior to today’s date enter “-2w”. To enter a date one month prior to today’s date enter “-1m”.

Right click on date fields to choose clear or enter today’s date from the menu.

**Phone Fields**

Right click on phone fields to clear.

**Email Fields**

Use mail icon to open your email application with the email address completed.
**Selecting an Item out of a Window**

Whenever e-Medsys opens a window in which you can select an item, such as multiple patients matching a name, just double click (with the left mouse button) to choose that item. As an alternative, you can single click the item to highlight, then click **OK**.

**Selecting Multiple Items from a List**

For consecutive items, highlight the first item then, with the **Shift** key pressed, click on the last item. To select non-consecutive items, hold down the **Ctrl** key and click on each desired row.

**Copy and Paste from a field in e-Medsys**

Highlight the desired field, and use the Windows shortcut keys **Ctrl/C**. To paste, click in the desired field and use the shortcut keys **Ctrl/V**. You can also copy from a field in any other Windows application, then click in the desired e-Medsys field, and use the shortcut keys **Ctrl/V** to paste.

**Calling up the Last Account(s)**

To access the last account that you were using on a previous screen, type a period in the account number box and the patient will be selected in the new screen. To view the last few accounts accessed, right click in the Account field box.

**Calling Up Members of a Family (Family Billing Only)**

Once a patient is selected, right clicking in the account number box will pull all members of the family including the guarantor.

**Inactive Patients**

An account must have a zero balance in order to be marked as Inactive. If an account is marked as Inactive, the system will prevent posting charges, payments, reversals, and appointment bookings to that account.

**Retain Old Data as Historical Data**

The system automatically saves all Patient Registration changes as Historical Data. This data is easily accessed from Patient Registration. The History display shows the user name and specific data changes.

**Patient Search Options**

- Patient – Checking this box will search the Patient file.
- Guarantor – Checking this box will search the Guarantor file.
- Show Members – Check to search for Family Members.
- Phonetic Name Search – Check to search by the sound of a name. For example, entering the name WYATT might return names that sound similar such as WHITE.
- Include Historical Records – Check to search on old records. For example if a patient’s last name has changed, this option would allow you to search for that old name.
- Include Inactive Accounts – Check to have the search include Inactive Accounts.
- Account Number – Enter the desired Account Number.
• **Last Name, First Name** – Enter the full name, or the first few characters of the name.

• **Birth Date** – This option searches for patients with the specified DOB.

• **SSN** - This option searches for patients with the specified SSN.

• **Home Phone** – This option searches for patients with the specified Home Phone number.

• **Policy #** - This option searches for patients with the specified Insurance Policy number.

**Search for Patient by Insurance Claim Number**

Precede the claim number with the ‘+’ key or the letter ‘C’ in the account number field to quickly retrieve the correct patient account. This feature is helpful when posting credit from an insurance EOB that only gives the system generated insurance claim number.

**Column Headers**

Right click on column header to save column widths and column positions for tables including Patient Insurance table, Inquiry Charge and Patient Appointment information tables and all File Maintenance tables.

**User-Defined Screen Colors**

Most users like the default colors that come with the e-Medsys screens. However, you can also design your own color scheme. Select File => Background Color. Hint: Don’t use the same color for any two items and avoid using black.