

Visual Outcomes Front Desk Part - 1

Project No. 214548
Job Aid

Job Aid

V.01
11 November 2014

Prepared by: Eddie Nicolson
Business area: Planning and Projects

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Training Manual Structure;

This manual is Part 1 of 6 parts. Version control, sign off and distribution are contained in part 1 only (this document).

Manual No.	Training Manual	Audience
Part 1	Front Desk Operations	VO End Users
Part 2	Front Desk Operations (Part 2)	VO End Users
Part 3	Front Desk Management	VO End Users / Supervisors
Part 4	Advanced Features	VO End Users / Supervisors
Part 5	Administration and Configurations	Administrator
Part 6	Management Reporting	Finance

1. Document details

1.1. *Contact for enquiries and proposed changes*

If you have any questions regarding this document or if you have a suggestion for improvements, please contact:

- Contact: Eddie Nicolson
- Title: Change Manager
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1.2. *Version history*

Version	Date	Changed by	Nature of amendment
0.1	11 November 2014	Eddie Nicolson	Draft of revised native copies (Parts 1-5) provided by VO

Versions 0.1 to 0.99 = Draft; Version 1.0 = Final (incl. sign off); Versions 1.1 to 1.99 = Draft; Version 2.0 = Final

Document sign off:

The following staff have **approved** this document

Name: Peter Westwood

Position: Executive Office

Signature: _____ *Date:* _____

The following staff have **recommended** this document

Name: Gerald Rieger

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The following staff have **accepted** this document

Name: Gordon Smekel

Position: Project Manager

Signature: _____ *Date:* _____

The following staff have **prepared** and **reviewed** the contents of this document

Name: Eddie Nicolson

Position: Change Manager

Signature: _____ *Date:* _____

The document has been **distributed** to the following:

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Rhianna Crosthwaite	Receptionist Team Leader	Consulted
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The values applicable to the function field are Author/Co-Author, Accountable, Consulted and Informed.

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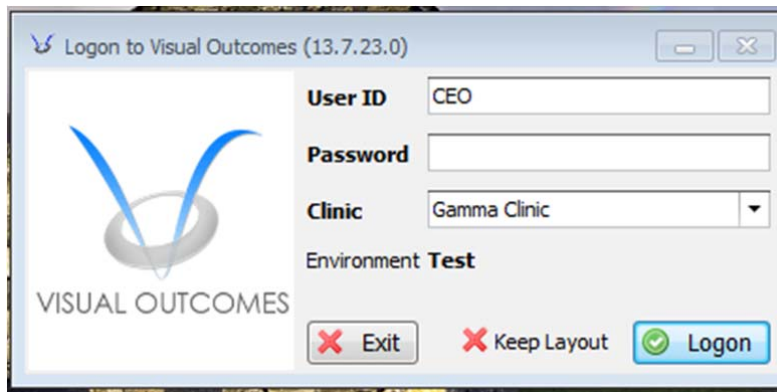
1. Security Procedures - Switching On/Logging off

Log On

Log on to the computer that you will use during the day.

Log On Window

The Logon requires a User ID and a password. These are allocated by Visual Outcomes through the *Personnel Wizard* and can be accessed or changed only by a person with the required security level.



Logon to Visual Outcomes (13.7.23.0)

USER ID: CEO

PASSWORD: [Empty]

CLINIC: Gamma Clinic

Environment Test

Buttons: Exit, Keep Layout, Logon

Logging on under your own User ID is important as the system allows gradation of security levels and also looks to User ID in attributing functions through the audit tools.

The Logon window identifies the 'Environment' – this is important to ensure that you know you are logging on to the correct database i.e. the live database or a backup/test database.

Test = Test and Training Database

Live = Live Database

It also displays the Clinic name to which you will be logged on – use the drop down menu to change to another Clinic before logging on.

Keep Layout allows you to log in as a different user, with a different role, but retain the layout of the windows.

Log Off

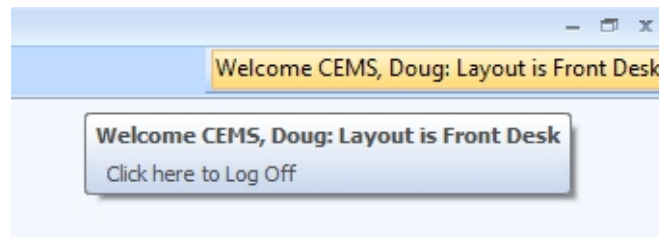
It is important to log off from Visual Outcomes at the end of your shift – this is to ensure that other users of the system are not operating under your ID and log in, for the reasons mentioned above.

If yours is the final shift for the day you should log off in Windows as well – this locks the computer to prevent unauthorised access while the clinic is closed.

Windows Special Key + L provides a short cut to lock your computer in Windows. If you use this shortcut any application running will remain in focus when the computer is unlocked, including Visual Outcomes.

Switching

The logged on user name and current screen layout appears in the top right hand corner of the screen. Click on this button to log off the current user and display the log on window for the new user.



If you share a computer with another Front Desk operator or Practitioner, you can ‘Switch’ users/log off the current user and to display the log on window, ready for the new user to log in.



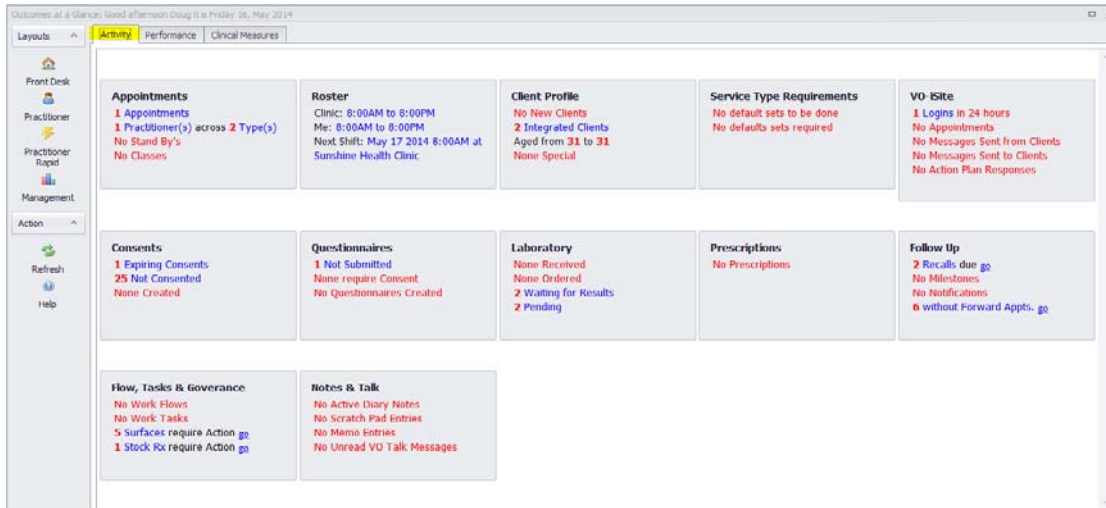
<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

2. Outcomes at a Glance

The first screen that appears after logging on is 'Outcomes at a Glance'. This gives an overview of the day ahead and a snapshot of important information relevant to the logged on user e.g. CA/front desk, practice manager or practitioner. The window is split between 3 tabs. Let's review each tab:

Activity tab

This window displays a view of the Activity Centre window. Clicking on **go** next to selected items opens the relevant view for when the Outcomes at a Glance window is closed.



Performance tab

This window displays charts relevant to daily appointment activity. Hover over the charts for details.



- **Appointment Management**

This graph shows the appointment progress for the default clinic throughout the day.

- **Daily Appointments**

The number of appointments for every practitioner in all clinics today and the average number of appointments per day in the last 7 working days, 30 working days and 90 working days.

- **No Forward Appointment**

This shows the number of clients who have an appointment today in the default clinic but no forward booking.

- **Debtors Today**

This shows the amount owing by clients who have an appointment today in the default clinic.

- **New Clients**

The number of new clients booked today in the default clinic and the average of new clients per day in the last 7 working days, 30 working days and 90 working days.

- **Weekly Appointments**

The number of appointments for every practitioner in all clinics in the current week and the average number of appointments per day in the last week, 4 weeks ago and 12 weeks ago.

On the left hand column of *Outcomes at a Glance* there are four buttons:

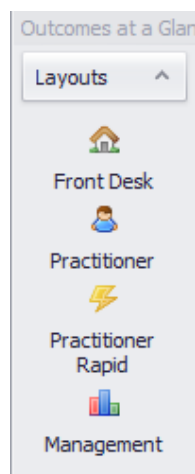
Clinical Measures tab

This window displays a list of Clinical Measures from the last 30 days. Select a Clinical Measure from the drop down menu.

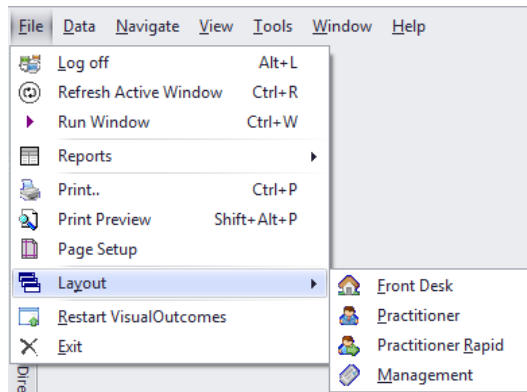
Code	Category	Numerator Name	Numerator	Denominator	Result	PEI	PNMS	NP1
NQF 0027.1.1	Population 1	Numerator 1	0	217	0	0	0	1841480209
NQF 0027.1.2	Population 1	Numerator 2	0	217	0	0	0	1841480209

At the bottom of the table, summary statistics are shown: SUM=0, SUM=434, AVG=0.

Functional Role Display Layouts



These buttons will provide you with predetermined display layouts dependent upon your role in the clinic. You can also access them through the *File Menu - Layout*.



The layout options are as follows:

- **Front Desk**

Navigator and *Follow Ups* docked to the left; *Arrivals* and *Work Task* docked to the right; *VOTalk* docked to the bottom; *Client Director* pinned to the left; *Appointment Calendar*, *Invoice Manager* and *Messaging Wizard* open, *VO FAQ*; *Standby* and *Diary* columns open (if ticked on).

- **Practitioner**

Client Clinical Screen is in focus; *Client Director* docked to the left; *VOTalk* and *Arrivals* docked to the bottom; *Scratch Pad*, *Clog* and *Clinical Governance* docked to the right; *Appointment Calendar*, and *Image Manager* open. When you refresh the *Client Director* it will hold the position on the previously used view.

- **Practitioner Rapid**

Layout is similar to the above but opens up on *Fast Screen* for use in a Bar Code Treatment environment, with *Arrival* flags on *Fast Screen* and default Bar Code Settings to enable scanner use. *Client Image Manager* and *Appointment Calendar* open as well, *Clinical Governance* is absent.

- **Management**

Navigator docked to the left; *Arrivals* and *Clog* docked to the right; *VOTalk* docked to the bottom; *Client Director* pinned to the left; *Appointment Calendar*, *Roster*, *Invoice Manager*, *Management Statistics*, *Template Manager* and *VO FAQ* open; *Standby* and *Diary* columns open on *Appointment Calendar* (if set "true" on Help/Settings).

All changes in layout made by the user, particularly on a PC, will be saved automatically and will open at their first log in. However, if one of the above options is chosen at log in, they will override the user's layout and convert the Visual Outcomes view back to its default.

- **Refresh** - updates *Outcomes at a Glance* with the latest information.

Outcomes at a Glance Bypass

If you are a Visual Outcomes Administrator (password protected) you can use *Visual Outcomes Setup* to bypass the *Outcomes at a Glance* screen altogether by changing the *BypassOAGOnStartup* setting to "true". Alternatively, log in as CEO and change Help/Settings.

This will load the *Front Desk* layout automatically.

For management tasks (working with Domain Manager, Template Manager, Management Reports) it is best to have a clear Visual Outcomes screen; set *BypassOAGOnStartup* to "false" and simply close this screen via close icon (x) on the right top corner.



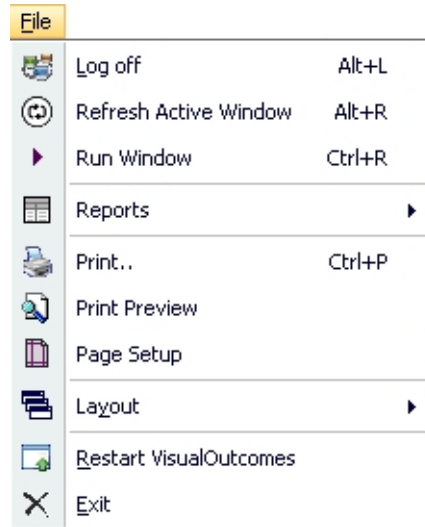
<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

3. Main Menu Bar

An important part of becoming familiar with Visual Outcomes is getting to know the Main Menu bar. The Navigate menu, in particular, is the hub of Front Desk activity and will be explained in more detail:



File Menu



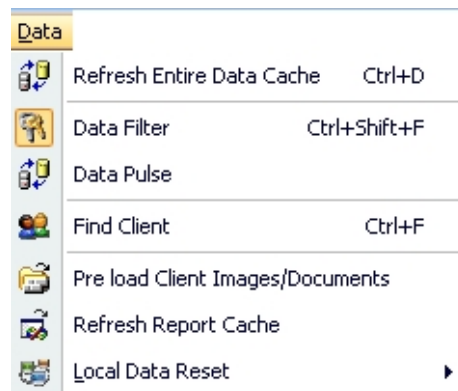
- **Log Off:**
 - Closes the Main Application window and returns to the Log On screen;
 - Writes an audit of action to the Visual Outcomes Database.
- **Refresh Active Window:**
 - Refreshes the data on the current active window.
- **Run Window:**
 - Activates a *Run Window* allowing you to activate a Window by using the keyboard only (CTRL+R).
- **Reports:**
 - Select a report and action for practice management purposes.
- **Print:**
 - Prints the currently active screen.
- **Print Preview:**
 - Previews the currently active screen.

- **Page Setup:**
 - Activates the *Page Setup* dialog box;
 - This allows you to set the default layout and paper type for general printing.
- **Layout:**
 - Allows you to select the Functional Role Display Layout you wish to view.
- **Restart Visual Outcomes:**
 - Reboots the application.
- **Exit:**
 - Exits the application after prompting.



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

Data Menu



- **Refresh Entire Data Cache:**
 - On start up, Visual Outcomes retrieves critical data elements that are cached locally. This reduces the number of data requests to the database and hence increases response time;
 - When critical data changes are made (adding personnel, services etc.), it is a strongly recommended that you activate this option.
- **Data Filter:**
 - Activates the Data Filter Form;
 - This form allows you to set the number for Clients that are cached locally inside the Visual Outcomes Database as well as various data elements;
 - This does not impact the database.
- **Data Pulse:**
 - This activates/deactivates all visual elements that contain a data pulse;
 - A data pulse is an automatic retrieval of data from the database at pre-elapsd times. Each visual element can be manually activated/deactivated as well as providing the

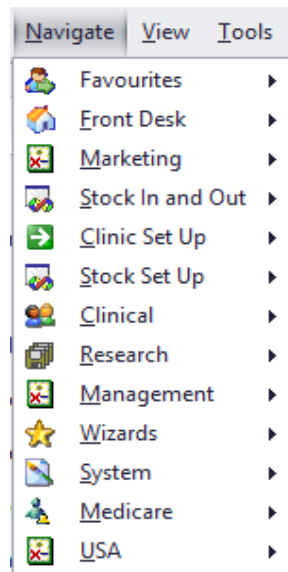
pulse interval. Use the tool tip to determine the interval measure (seconds or minutes);

- As an example, the *Appointment Scheduler* contains a data pulse that by default is two minutes.
- **Find Client:**
 - Activates the *Client Find* box.
- **Preload Client Images/Documents:**
 - On option for a remote clinic to preload documents and images to increase application speed.
- **Refresh Report Cache:**
 - Report templates are also cached locally on the client. When changes/additions are made, activate this option to retrieve the latest template from the server.
 - *Optimise Database:*
 - This option will defragment the indexes used within the database as well as perform statistical analysis and optimisation of the data elements;
 - This option does not interfere with the operation of Visual Outcomes and any other user of Visual Outcomes will not be affected;
 - You will probably notice an initial slowdown of system, but this will quickly disappear as use continues;
 - It is a very good idea to perform this operation daily and before the Clinic opens.
- **Local Data Reset:**
 - To reduce bandwidth, Visual Outcomes only retrieves certain files when requested. After a period of use, the amount of files stored locally may grow;
 - This option DOES NOT delete/destroy any data from the server and can be used at will;
 - Visual Outcomes will automatically retrieve critical files (such as a Report Template) when necessary.



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

Navigate Menu

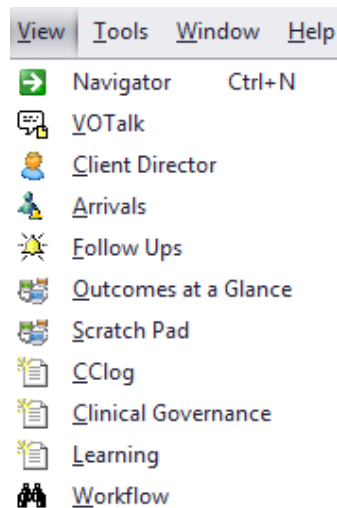


- This menu item contains access to all visual elements of Visual Outcomes grouped by functionality/area;
- It has exactly the same structure as the *Navigate* view.



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

View Menu

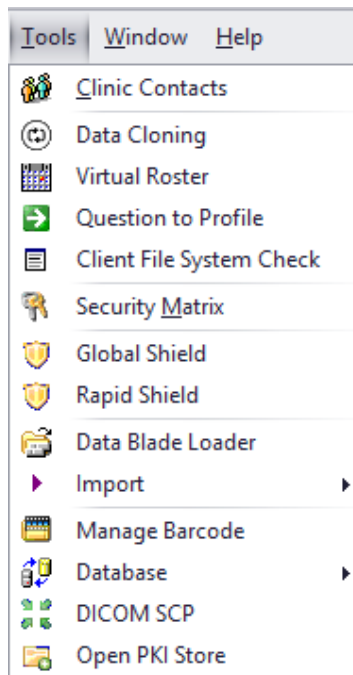


The View menu provides access to *Views*. A view is a data panel that contains important sets of data. All Views are allowed to be hidden, docked or resized to accommodate your style.

- **Navigator:**
 - Shows all visual elements that are accessible to the currently logged on user, grouped by functionality;

- If a data element is missing, please contact your CEO or Practice Manager to allow you the appropriate permission via the *Security Wizard*.
- **VOTalk:**
 - Shows/hides the *VOTalk* view.
- **Client Director:**
 - Shows/hides the *Client Director*.
- **Arrivals:**
 - Shows/hides the *Arrivals* window.
- **Follow Ups:**
 - Shows/hides the *Follow Ups* tab.
- **Outcomes at a Glance:**
 - Shows/hides the *Outcomes at a Glance* view.
- **Scratch Pad:**
 - Shows/hides the *Scratch Pad* window.
- **Cclog:**
 - Shows/hides the *Cclog* window.
- **Learning:**
 - Shows/hides the *Learning* window.
- **Workflow:**
 - Shows/hides the *Workflow* window.

Tools Menu



The Tools menu provides access data and security tools.

- **Clinic Contacts:**
 - Provides a list of all relevant contact for quick reference;
- **Data Cloning:**
 - Use the Data Cloning feature to avoid mistakes when setting up multiple clinics – transfer services, prices, stock and practitioner information in a click;
- **Virtual Roster:**
 - This tool is very useful for clinics with a large number of practitioners divided into teams by shift time. Create a time pattern and apply it for practitioner groups;
- **Question to Profile:**
 - Links questions from clinical questionnaires to clinical profile note:

Question to Profile

Saved Mappings
A predefined list of mappings to help with large volume of questions and profiles.
Load Saved Mappings

Add a Question and the target Profile.
The Profile will be date stamped using the date the Questionnaire was created for the Client.
You can create a saved mapping when you "apply" the Questions to a profile for the first time.

Question	Profile
I Swollen OCC	<input type="text"/>

0

Mapping 1 of 1

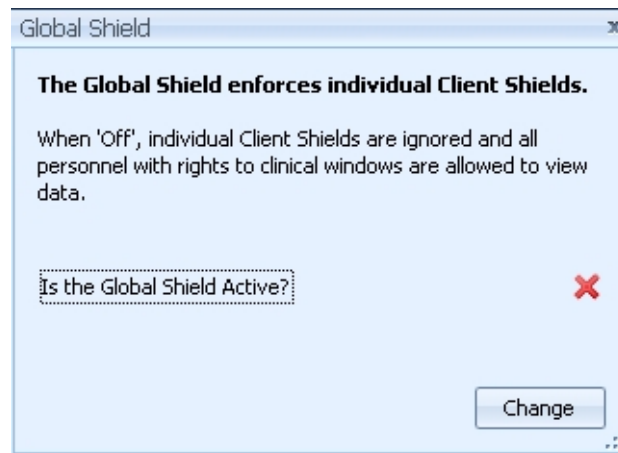
Save Mapping

Run Mappings against current Client Questionnaires

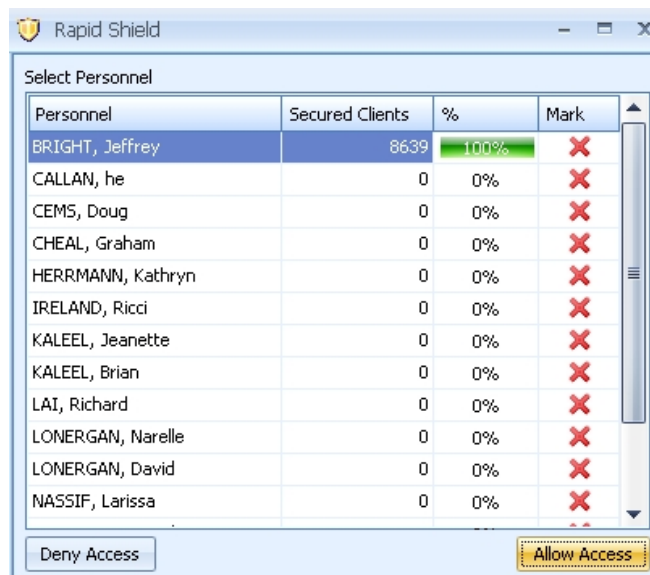
Select the minimum date of the Client Questionnaires. 24 Jul 2013

Apply

- **Client File System Check:**
 - Checks that all files for current client (loaded to the Client Director) are valid
- **Security Matrix:**
 - Displays the Reports, Statistics and Windows available at the security level of the currently logged on user;
- **Global Shield:**
 - Allows Client Shield to be turned on or off for all practitioners in all clinics. (Refer to the section on Working for Practitioners)



- **Rapid Shield:**
 - Review Client Shield for each practitioner; deny or allow access to all clients in all clinics for each practitioner.



- **Data Blade Loader:**
 - This option will allow you to upload and install new questionnaires, work surfaces, symbols, Licence updates, statistics, reports and templates purchased from the Visual Outcomes website. Please contact our support team in relation to the VO-iShop.
- **Import:**
 - This allows you to import *Billable Items* and *Practitioners* and allows you to *Deactivate Practitioners*.
- **Manage Barcode:**
 - This option allows the current computer to listen for a barcode swipe for Client Check-in;
 - Not to be used until explicitly told so by Visual Outcomes representatives.
- **Database:**
 - *Refresh Procedure Cache:*

- This is used to clear the Visual Outcomes database commands. Only use this option when instructed from Visual Outcomes support;
- *Optimise Database:*
 - This procedure reorders indexes and updates statistics used to optimise performance of the Visual Outcomes database.
- **DICOM SCP:**
 - Direct call to DICOM server to load images from digital X-ray device to Visual Outcomes Client file
- **Open PKI Store:**
 - Medicare set up tools

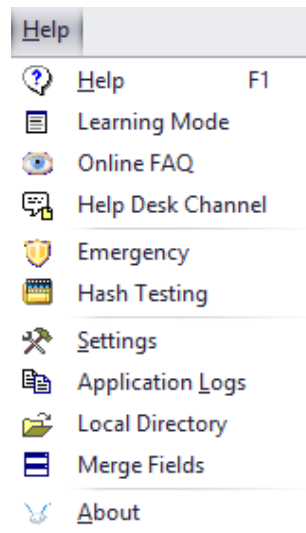
Window Menu

- **Window Settings Impact:**
 - Shows what settings have been set up in relation to this window and what settings values are – mainly used for the Appointment Calendar to see what could affect performance and speed.
- **Full Screen:**
 - Causes the application to switch between full screen and normal mode;
 - Use F11 to manual switch;
 - When in *Full Screen* mode, the Menu is hidden, hence the use of the *Navigator View* to access other visual elements.
- **Disconnect Window:**
 - Allows you to disconnect the active window.
- **Open windows list:**
 - A list of all open Windows appears; the one marked with a tick is the 'active' window.
- **Close All:**
 - Closes all active windows.



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

Help Menu



- **Help:**
 - Opens the online electronic form of the *Features and Functions Guide*.
- **Learning Mode:**
 - Opens up a form docked on the right in order to aid the user in performing particular tasks. In order to configure the learning content, please see
- **Online FAQ:**
 - A link to the on-line Visual Outcomes knowledge database.
- **Help Desk Channel:**
 - A dialog box will appear to assist the user with system problems.
 - It is important to follow the steps in the prompt before submitting a help desk ticket.

The Help Desk Channel will give you the most efficient and effective response.
 Have you first checked:
 1) F1 Help file
 2) The FAQ's
 3) Asked your manager
 Now use the Help Desk Channel

Area of Interest:

Affected Window:

Detailed description of the Task

Steps Taken

My Proficiency:

- **Emergency:**
 - This will allow access to all clinical records regardless of the Client Shield. Only Practice Managers may be granted Emergency Access.
- **Settings:**
 - Review and change Visual Outcomes settings. Please note change is available only to CEO security level. Please read *Appendix 1 Visual Outcomes Settings* before attempting modification.
- **Application Logs:**
 - List of available application logs. Our support team might ask you to select one of them and send to our department, which helps to identify and eliminate problems in running Visual Outcomes.
- **Local Directory:**
 - This will launch your file explorer and open the directory where your local cache is stored.
- **Merge Fields:**
 - Review the list of available data fields for mail merge function. See *Mail Merge* section of this guide for more explanation on data fields.
- **About:**
 - Information on current Visual Outcomes version.





<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

4. Key Tools – View Tabs/Appointment Calendar

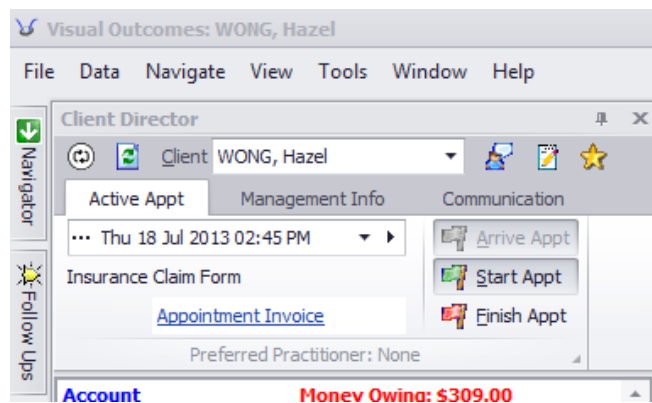
View Tabs

The *View Tab* panel appears when 'pinned' open. These tabs are used extensively in the day to day operation of Visual Outcomes and are explained in detail in Chapters 5 - 8.

The pin can be found in the top right corner of a panel:  Click on this until it turns into the down position which means the panel will put as you navigate through other parts of the screen. When the

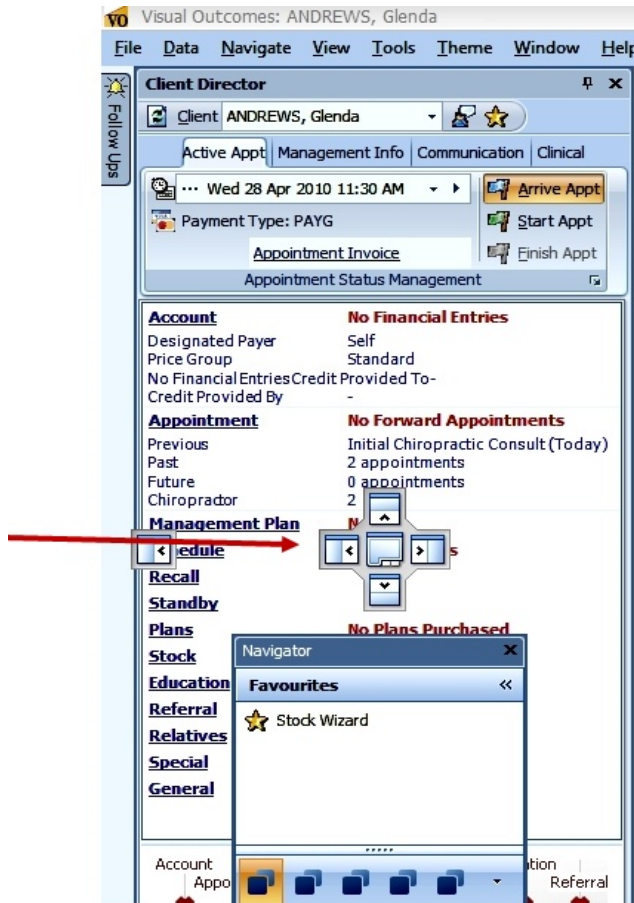
pin is facing left  this means that the panel will be active as long as the mouse hovers over, otherwise when you mouse off or click anywhere else, the panel will be docked to the side.

As a default, the Front Desk views appear as below upon opening:

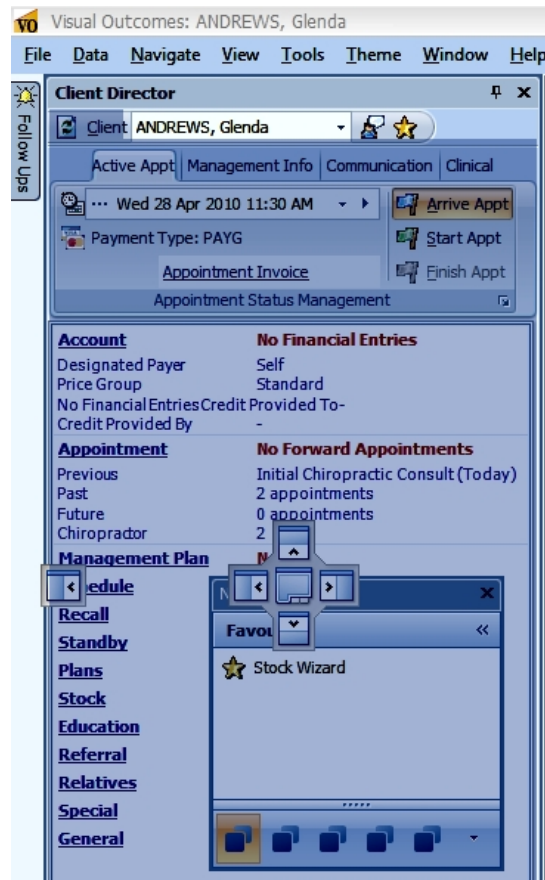


To create the tabbed appearance as in the picture above (below View Tabs heading):

- Dock “Navigator” and “Follow Ups” views;
- Put your mouse over the “Navigator” heading, left click hold mouse down and drag view till you see place holders appear:



- Drag the Navigator view to the middle place holder and drop when blue shadow appears:



- Repeat the process with the “Follow Ups” view.

Have a quick look at the views to familiarise yourself with the screens, then we’ll concentrate on the *Appointment Calendar*.

- **Client Director** - together with the *Appointment Calendar*, provides very useable client relationship management data;
- **Follow Ups** - extends this client relationship management data to actions or analysis – followed up by the Clinic personnel;
- **Navigator** - the main menu for navigating through Visual Outcomes.



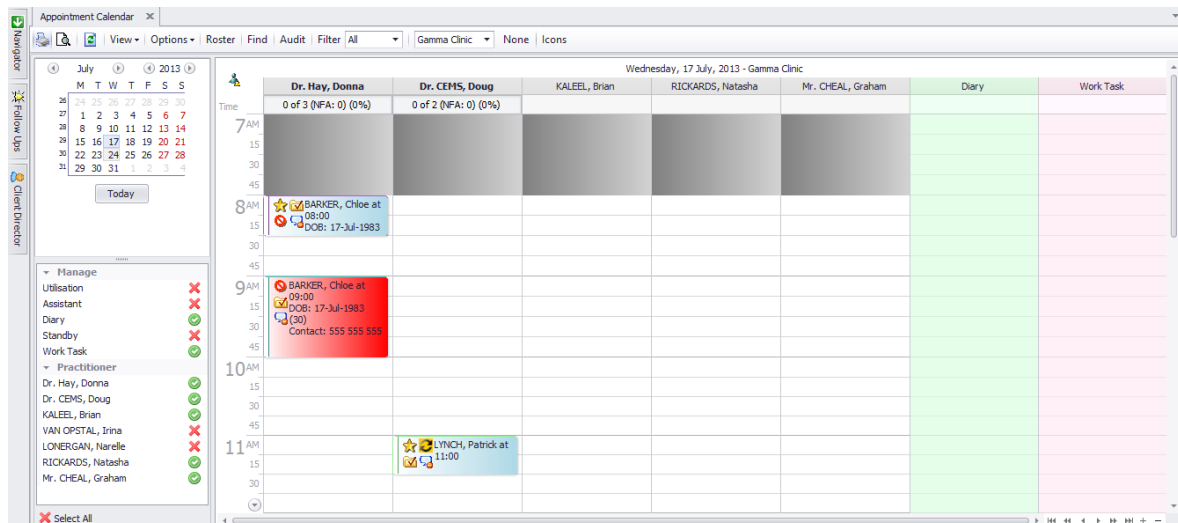
<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

The Appointment Calendar

This is the primary tool for managing clients who are attending appointments or classes. The *Appointment Calendar* allows you to:

- Create, Edit, Move and Cancel Appointments;
- Create Classes;
- Display visual messages to improve service to clients;
- Receive a visual prompt for a client late for appointment;
- Receive visual prompts for a client’s progress through the Clinic;
- View Appointments for a Clinic filtering for time period and type of appointment;
- Create ‘Standby Appointments’;
- Create CA diary notes;
- Review and check Work Tasks;
- Display services pre-set as available per hours and per day;
- Apply limits to client numbers seen in a time slot – workable exception routine;
- Assign a CA to particular appointments;
- View Practitioner utilisation of time available as day proceeds;
- Use fast ‘right click’ or ‘double click’ access to working with appointment slots;
- Copy and Paste appointments;
- Drag and Drop appointments.

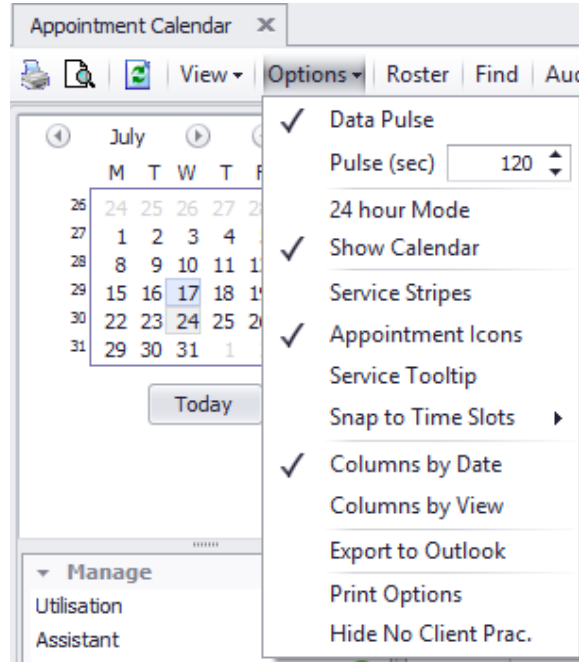
Let’s take a look at the layout of the *Appointment Calendar*.



Appointment Calendar Views

The Appointment Calendar can be viewed with or without the Appointment Icons, Service Stripes and Service Tooltips:

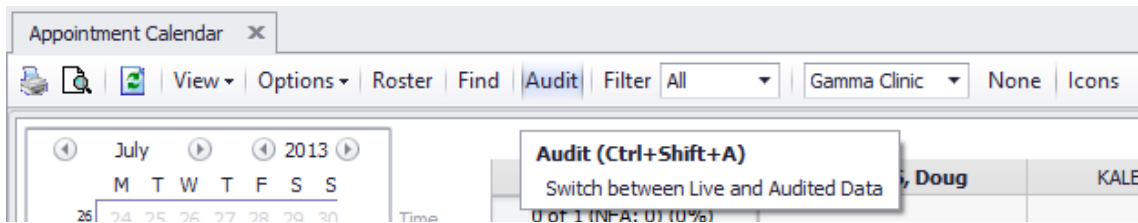
- Go to the Appointment Calendar, Options menu:




- Use “Appointment Icons” to turn the Appointment Icons on or off;
- Use “Service Stripes” to turn the Service Stripes on or off;
- Use “Service Tooltips” to turn the Service Tooltips on or off.
- Use “Snap to Time Slots” as Auto, Always, Never, Disabled.

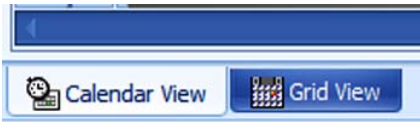
Appointment Calendar Tool Bar

- Hovering the cursor over the icon will bring up a tool tip which indicates the purpose of the icon/button.



Printing the Appointment Page

- To print from the *Appointment Calendar* select Print or Print Preview 
- To print Appointment Calendar in Memo style select Grid View at the bottom of the screen



- Print Preview (the Grid View) – daily calendar view of appointments;
- Print (the Grid View) – use after selecting from Print Preview.

Refreshing the Appointment Calendar icon

- Refresh the screen display to update for data added. For details, refer to 'System'.

View Button

- Allows you to switch between the Practitioner and Resources of the Appointment Calendar.

Options button

- *Auto Refresh on Appointment Calendar* – set the data pulse time;
- Choose 24 hour display; Lets you view the whole 24 hour day in the appointment calendar as opposed to just the 'open hours' e.g. 7am- 3pm.
- Switch between showing or hiding Service Stripes, Appointment Icons and Service Tooltip;
- Sort columns by Date or View;
- Export the Appointment Calendar to Outlook;
- Allows you to setup your print options;
- Hide No Client Practitioner – removes any practitioners that do not have clients from the calendar.

Roster button

- Select to be taken from the date in view in the *Appointment Calendar* to that same date in the *Roster*. This is a useful tool when making an exception to the *Roster* for an appointment time slot ahead of the current day.

Find button

Find either:

- The next available appointment by type of service; or
- The next appointment already booked for a client; or
- The next appointments for a practitioner.

Filter menu

- This drop down menu allows you to filter the appointments you can view on the calendar by specific criteria.

Change the Clinic menu

- This allows you to change the calendar view between clinics in a multi-clinic practice.

Icon Legend

- This displays a legend for all icons available on the *Appointment Calendar*.

Name	Icon	Display?
Appointment Confirmed	Y	<input checked="" type="checkbox"/>
Appointment Rejected	N	<input checked="" type="checkbox"/>
Attended at least 2 Classes	👤	<input checked="" type="checkbox"/>
Created via the Internet	🌐	<input checked="" type="checkbox"/>
Finance Issue	🚫	<input checked="" type="checkbox"/>
Free Form Plan	📄	<input checked="" type="checkbox"/>
Has a forward appointment	📅	<input checked="" type="checkbox"/>
Has PAYG Credit	👤	<input checked="" type="checkbox"/>
Incomplete Management Plan	✖	<input checked="" type="checkbox"/>
Installment Plan	🔄	<input checked="" type="checkbox"/>
Marked as Special	⚠	<input checked="" type="checkbox"/>
Missed Appointment Fee (MAF)	📅	<input checked="" type="checkbox"/>
New Client	★	<input checked="" type="checkbox"/>
No Clinical Symbols	📄	<input checked="" type="checkbox"/>
Note	📄	<input checked="" type="checkbox"/>
On Schedule	📅	<input checked="" type="checkbox"/>
Out of Schedule	🕒	<input checked="" type="checkbox"/>
Plan Money Low	💰	<input checked="" type="checkbox"/>
Prepayment Plan	👤	<input checked="" type="checkbox"/>

Save

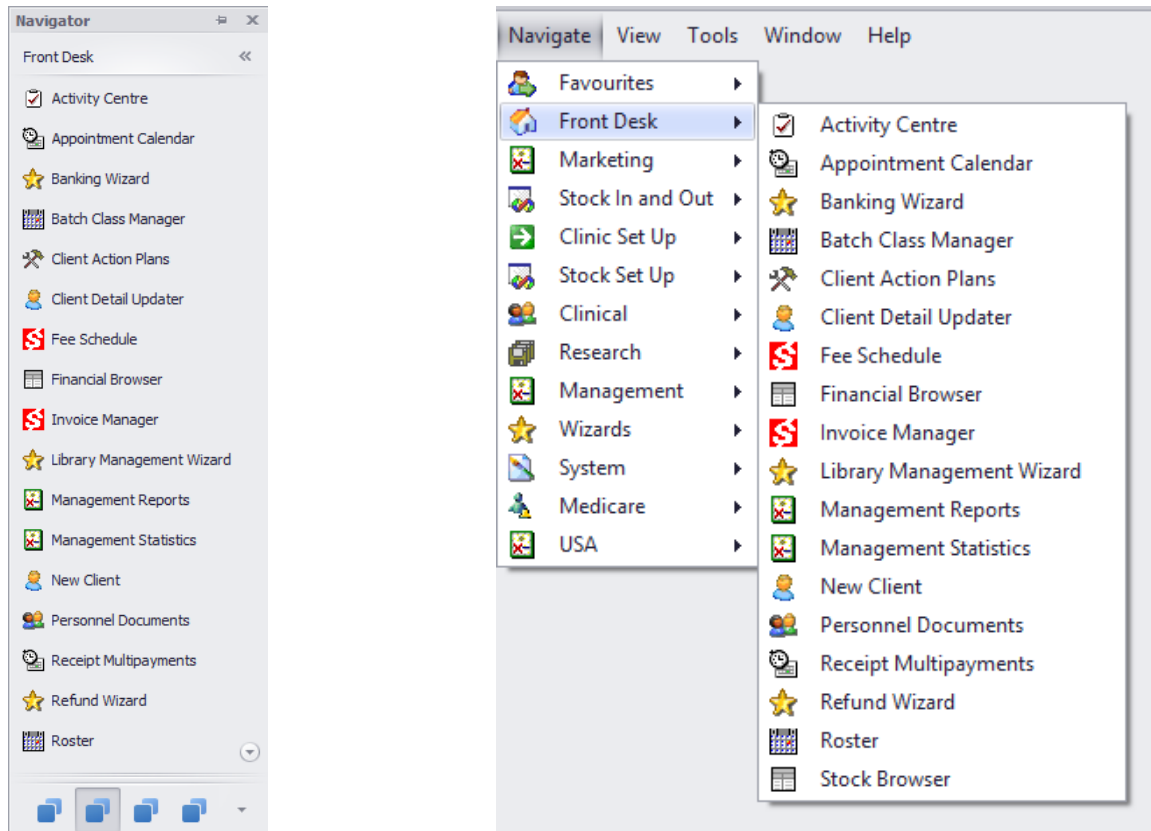


<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

5. Navigator Functionality

The *Navigator* tab contains the **main menu** for navigating through Visual Outcomes. It is organised into the principal functional areas of the Practice. The Navigator menu items can also be accessed via the 'Navigate' menu on the *Main Menu Bar*.

You will notice that you have your own "Front Desk" sub-menu containing the *Navigator* functions you are most likely to use on a daily basis. This menu is a good starting point if you are having difficulty locating a particular function.



The Client Director

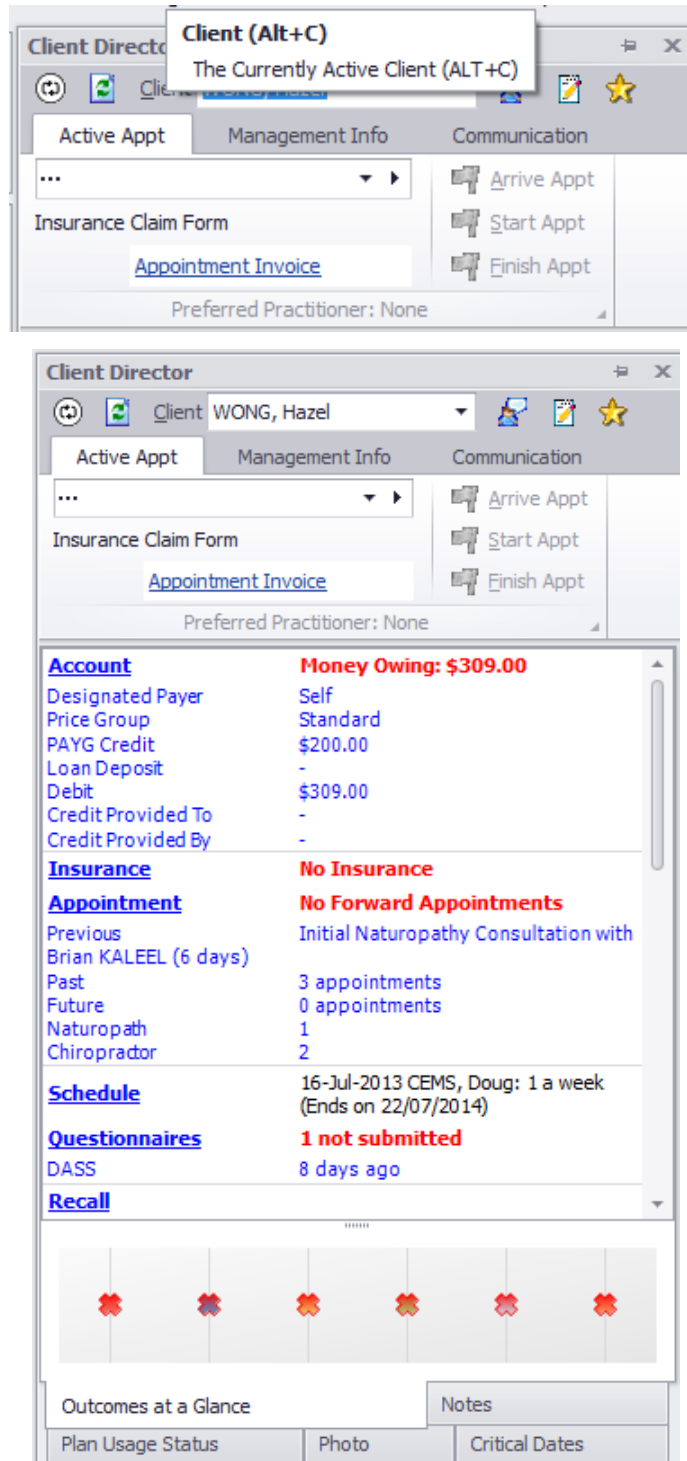
The *Client Director* will generally be open with the *Appointment Calendar*. It is the hub of Visual Outcomes for a Front Desk CA. It combines with the *Appointment Calendar* to provide a powerful Customer Relationship Management (CRM) tool.

There is a large amount of information recorded about a client in Visual Outcomes. The Client's personal outcomes are displayed, which makes it the client-centric focal area. From here you are able to:

- View appointment history and forward appointments;
- View financial history and current status;
- Anticipate the client's needs;
- Understand the client's requirements;
- Service the client's expectations;
- Send the client Fast Messages;

- Be aware of the client’s family and arrangements;
- Monitor the client’s progress in the Clinic;
- Assign forms/questionnaires for the client to fill in.

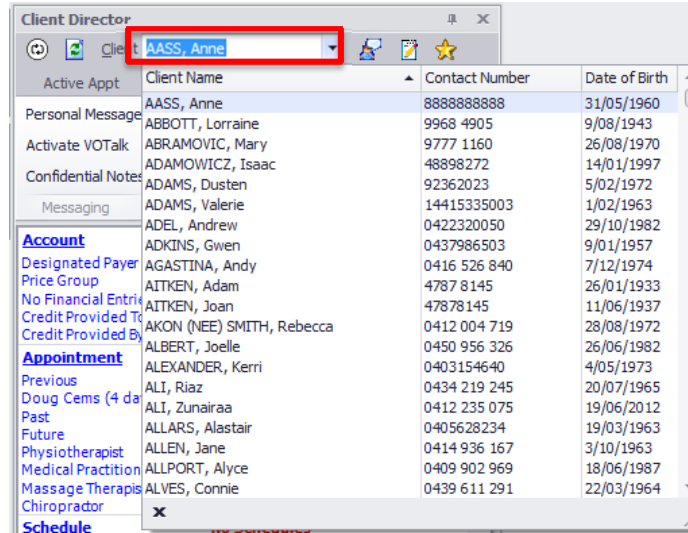
These notes describe the layout of *Client Director* in general terms. Remember that hovering the cursor over the icon will bring up a tool tip which indicates the purpose of the icon.



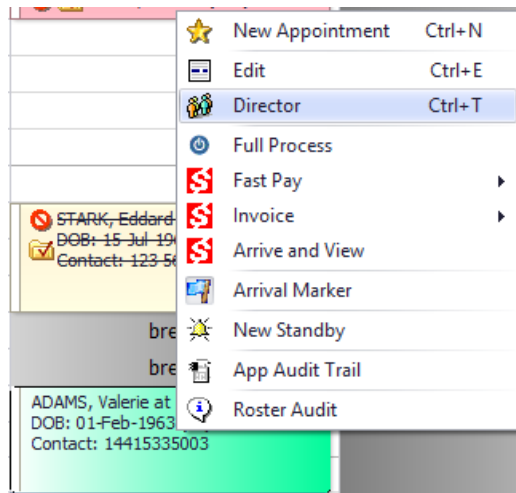
Accessing the Client Director

Visual Outcomes recognises the importance of the visual connection to information specific to a particular client. Therefore there are various pathways to the *Client Director*:

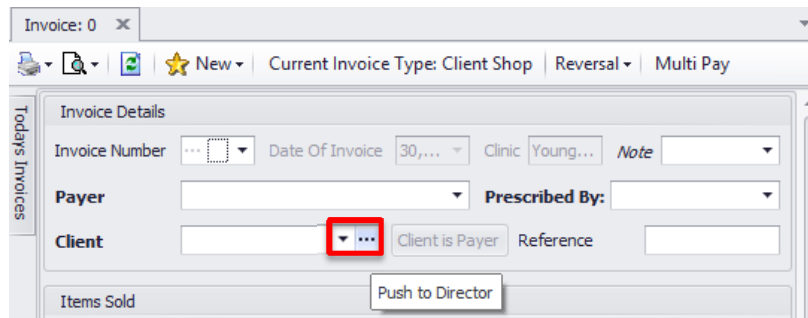
- By typing the client’s name in the text box or selecting from the drop down menu;



- By right clicking on an appointment in the *Appointment Calendar* and selecting ‘Director’;



- A client selected in the *Invoice Manager* will be ‘pushed’ to the *Client Director* once the ellipsis button (...) is clicked;



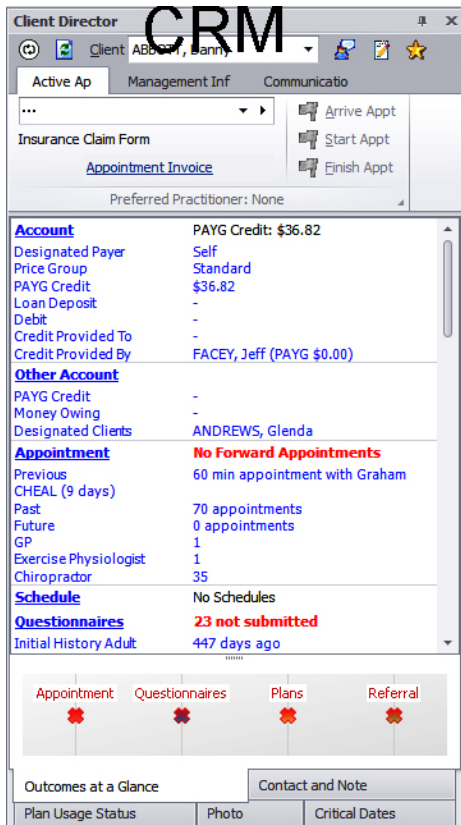
- In many other parts of Visual Outcomes, for example in invoices, receipts and management statistics, select the ellipsis (...) appearing beside a client’s name.

Client Director Operation Modes

- Client Director CRM available on Front Desk login with Active Appt, Management Info and Communication tabs. Displays general client information.
- Switching to CRM mode on the Clinical Director hides Clinical tab and clinical information.

Client Director Clinical

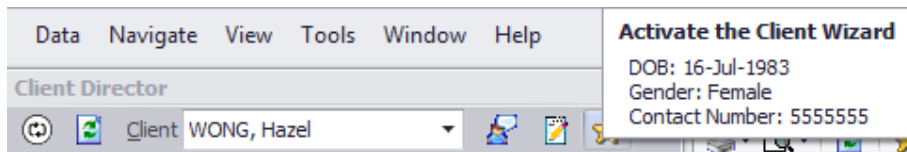
This is a Clinical mode of operation, available on practitioner login with Active Appt, Communication and Clinical tabs. You can differentiate Client Director mode by background picture:



Switching to CRM mode on the Clinical Director hides Clinical tab and clinical information. To switch use this icon:

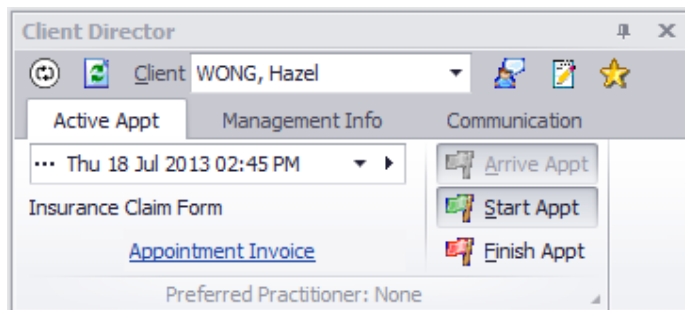


Accessing Client Details



From the *Client Director* it is a single click to the full details saved for a client in the *Client Wizard*. Activate the *Client Wizard* through the *Gold Star* icon beside the client's name in the *Client Director*.

Active Appointment Tab

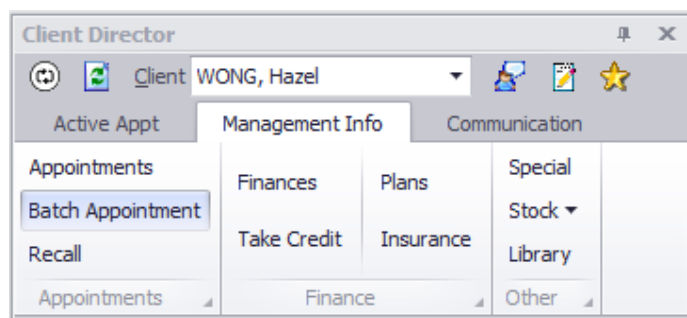


This tab contains details of the appointment in focus:

- There is an indicator showing whether the client has pre-paid for services or is a PAYG (pay as you go) client;
- The drop down menu shows a list of all past and forward appointments. Scroll to any appointment – select the forward arrow and the *Appointment Calendar* goes directly to the day selected;
- Remember that if you have initiated a particular client in the Client Director through right clicking an appointment, that specific appointment will be showing and the Client Director will be working around that appointment date.
- Flags marked – ‘**Arrive**’, ‘**Start**’ and ‘**Finish**’ - regulate the client’s progress in the practice:
 - **Arrive** – is automatically checked upon touch screen or bar code check in. Otherwise manually checked by clicking on the flag;
 - **Start** – is automatically checked through the bar code or checked by the Practitioner when client treatment starts. If the Clinical module is not being used the ‘Start’ flag is checked by the Front Desk;
 - **Finish** – is automatically checked through the bar code or checked by the Practitioner when client’s treatment ends. If the Clinical module is not being used, the ‘Finish’ flag is checked by the Front Desk.

It is essential to check the ‘Arrive’ flag. Without this flag checked VISUAL OUTCOMES will not recognise that the client is in the practice and will not record that the client has been in the practice. It is not essential to use the Start and Finish flags but it does help maintain a record of time taken in treatments.

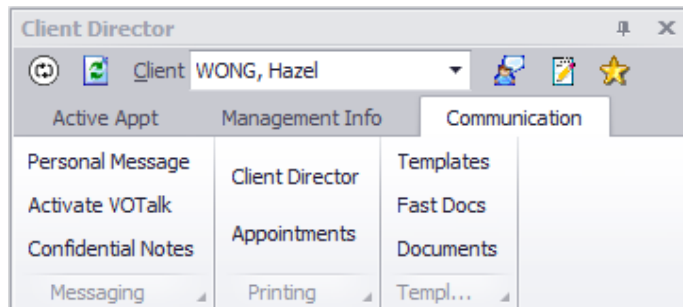
Management Info Tab



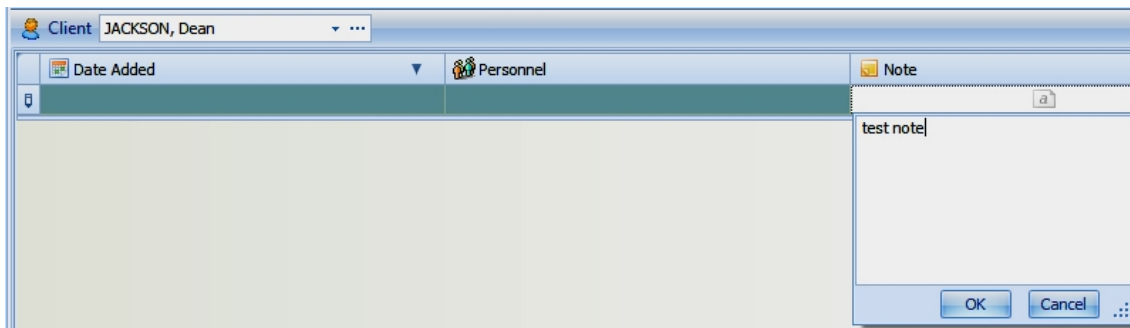
- **Appointments** – shows all appointments for this client grouped as ‘past’ and ‘future’;
- **Batch Appointment** – allows batch (multiple) forward bookings to be made for the client;
- **Recall** – allows you to make a recall note for this client;
- **Finances** - shows the client’s finances in great detail. The window contains tabs that show ‘Fully Paid’ and ‘Not Paid’ invoices as well as ‘Receipts’. You can click on the highlighted blue invoices or receipt numbers to take you to the original. The client’s finances can also be accessed by clicking on the ‘Account’ link in the *Client Outcomes at a Glance* panel;
- **Take Credit** – allows creation of ‘PAYG’ credit. This applies where the client wants to pay for services or stock in advance but is not taking out a specific treatment plan;
- **Plans** – will take you to the *Client Plan Wizard* (with the client’s name loaded) where you can set up or modify any plan for the client currently named in the *Client Director*;

- **Insurance** – will take you to the *Client Insurance Plan Wizard* where you can create or edit an insurance plan for the client selected in the Director (currently available only for USA Visual Outcomes mode)
- **Special** - adds the client in the *Client Director* to the *Special* list;
- **Stock** - to record a Stock Back Order for the client in the *Client Director*;
- **Library Wizard** - activates the *Client Library Management Wizard* with focus on the client in the *Client Director*.

Communication Tab



- **Personal Message** – generates a form to send a ‘fast message’ to the client in the *Client Director*. SMS or e-mail can be used;
- **Activate VO Talk** - activates *VO Talk*, an internal messaging system focussing on the client in the *Client Director*. Refer to ‘Using VO Talk’;
- **Confidential Notes** - These notes, when created, will not be visible to anyone except the CEO and the user who created them. To create a *Confidential Note*:
 - Go to the *Communication* tab in the *Client Director*, click on *Confidential Notes*, type in the note and click *OK*.



- **Client Director** – preview and prints the *Client Director* information in view;
- **Appointments** – previews and prints client’s appointments in a calendar format. To print appointments this way:
 - Click on *Appointments*;
 - In *Print Preview* you will see a calendar with the appointments highlighted and a detailed list of dates, times and locations;
 - Print the page using the *Print icon* on the toolbar.

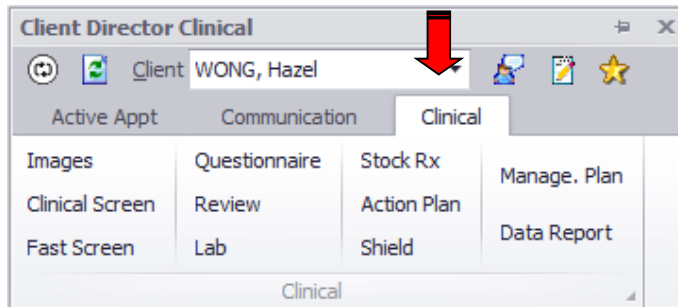
Appointments for ABOU, Olga

February 2009	March 2009	April 2009	10-Mar-2009 07:30 AM
M T W T F S S	M T W T F S S	M T W T F S S	Alpha Clinic
26 27 28 29 30 31 1	1 2 3 4 5 6 7 8	1 2 3 4 5	2 11-Mar-2009 07:30 AM
2 3 4 5 6 7 8	9 10 11 12 13 14 15	6 7 8 9 10 11 12	3 17-Mar-2009 07:30 AM
9 10 11 12 13 14 15	16 17 18 19 20 21 22	13 14 15 16 17 18 19	4 18-Mar-2009 07:30 AM
16 17 18 19 20 21 22	23 24 25 26 27 28 29	20 21 22 23 24 25 26	5 24-Mar-2009 07:30 AM
23 24 25 26 27 28	30 31	27 28 29 30	6 25-Mar-2009 07:30 AM
			7 31-Mar-2009 07:30 AM
			8 01-Apr-2009 07:30 AM

- **Templates** - access to open message templates already created through the *Template Manager*.
- **Fast Docs** – opens up the Client Fast Document: Mail Merge
- **Documents** – opens all of the client’s documents, organised by category.

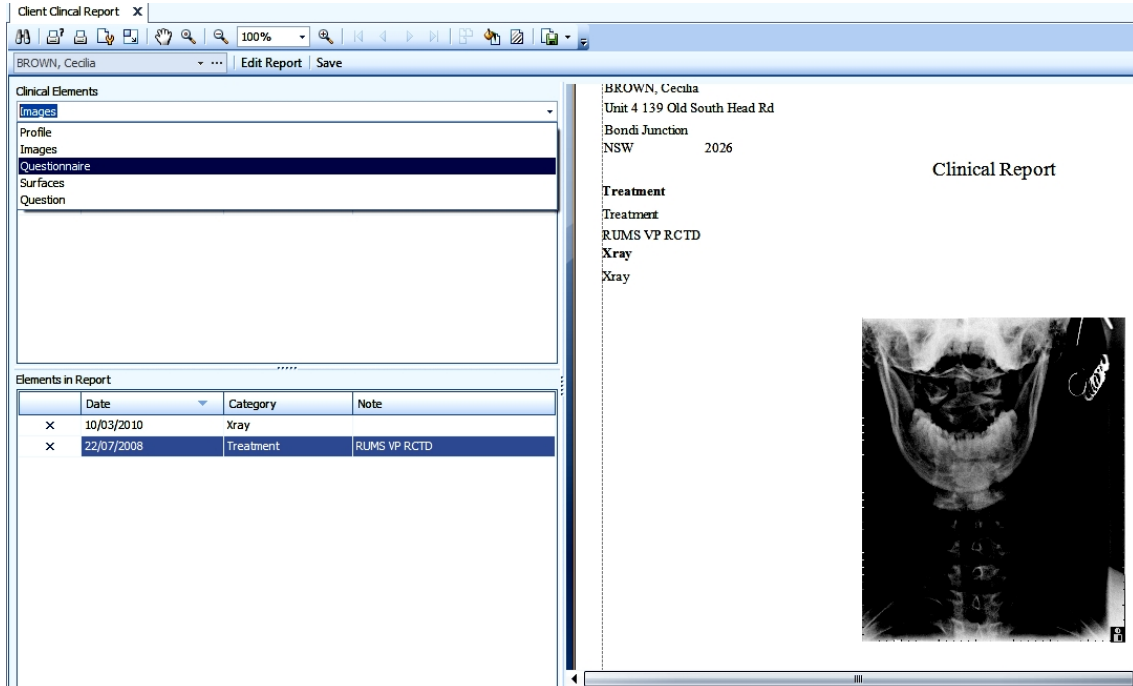
Clinical Tab

The Clinical tab is for use by the Practitioner only and can be viewed in the Practitioner Layout, or by clicking on the ‘Switch Mode’ button, if you have the security access to do so. However, this is a brief overview of its capabilities:

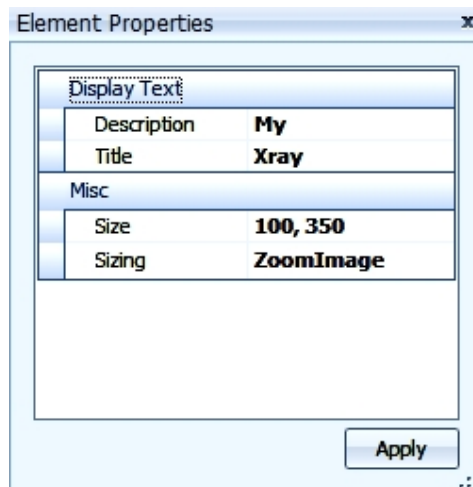


- **Images**– manages images for the client in the *Client Director*, including importing;
- **Clinical Screen** – opens clinical screen for treatment session;
- **Fast Screen** – opens Fast Screen for treatment session;
- **Questionnaire** – opens Questionnaire facility for client to fill in examination forms or for practitioner to review forms done previously;
- **Review** – displays all clinical notes recorded in a clinical session whether treatment or other note type made in the Client Clinical Screen or Fast screen; may be filtered/reviewed only;
- **Lab** – open the client’s current and historical lab orders.
- **Stock Rx** – open the client’s current and historical stock prescriptions.
- **Action Plan** – create/edit client action plans.
- **Shield** – where privacy and consents are applied in a clinic, this is the tool to select practitioners that have consent to view client images, documents, treatment and profile notes, questionnaires and management plans (CEO secured);

- **Management Plan** – opens the Management Plan window, which allows a practitioner to view all current management plans and create a new Management Plan where you can assign a certain sequence of events for a client health journey, review and manage it for that client.
- **Data Report** – create a report from available clinical elements:



- Select Profile and add clinical notes by clicking on '+'; similar action applies to Images, Questionnaires and Surfaces. You can also select some of the questions from questionnaires.
- Each element has Description and Title (title will render as bold font); you can also select size and display options for images and surfaces:



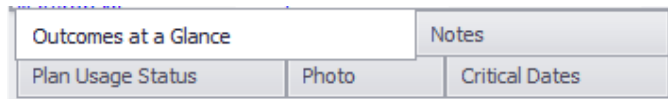
Client Outcomes at a Glance

Client Outcomes at a Glance is a key tool for the CA and for the Practitioner in gaining a comprehensive visual picture of information important to service quality and clinic experience. *Client*

Outcomes at a Glance is also a key tool for the CA and Practice Manager to review the client's status in the Practice.

Remember that clicking on any of the underlined headings (links) will drill down to further information or detail.

Tabs at base of window



- **Outcomes at a Glance tab** - displays *Client Outcomes at a Glance*;
- **Notes** - opens the *Contact Note* and *Note History* area. This is a summary of notes since contact with a new client and any subsequent enquiries, phone calls and relevant issues. It is a tool for all staff to be on the same page regarding a customer e.g. *Customer Service, General, Stock* or *Permanent Appointment* notes.
 - *Customer Service Note* - you can create a note to be used specifically for Customer Service purposes. Looking at the client name at the top of *Client Director*, hover the mouse over the *Customer Service Note icon* on the right to always see the most recent note of attention for *Customer Service*;
 - *General Note* – appears on *Client Outcomes*;
 - *Stock Note* – appears on *Client Outcomes* within the stock area and above the list of the last six stock purchases. Is used to indicate any prescriptive notes regarding the stock items e.g. dosage or length of time the supplement is to be taken. Both *General* and *Stock* notes help with compliance and phone enquiries from the client;
 - *Permanent Appointment Note* – appears in red on all future appointments for the client in the *Client Director*. Once deleted, appointments made from that time will not carry the note.
- **Plan Usage Status tab** - a summary of the progress that the client in the *Client Director* is making with their treatment plan;
- **Photo tab** - a screen for importing a photo image of the client for inclusion in the *Appointment Calendar* tool tip.

Critical Dates - A display of all critical dates made in Visual Outcomes: appointment, medical review, management plan review.



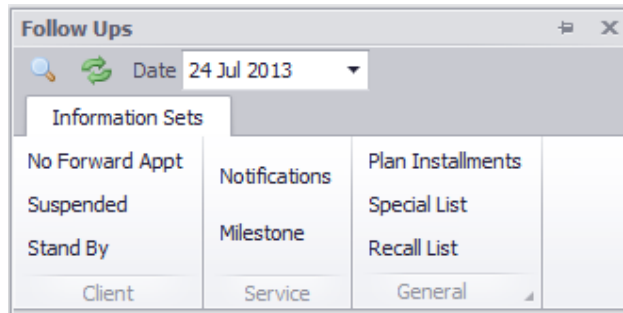
<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-1/>

6. Follow Ups

The Follow Ups tab

The *Follow Ups* tab contains analysis and action options relevant for following up on clients and their treatment schedules.

We have divided the Follow Ups tab into three sections: *Client*, *Service* and *General*.

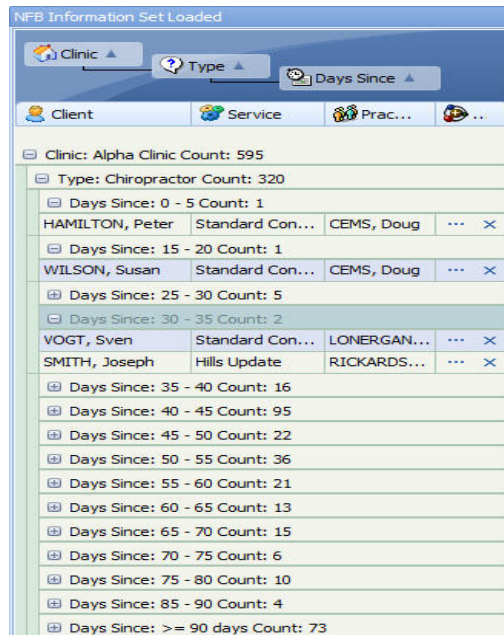


The options are explained below:

Client:

No Forward Appointment

The list includes all ‘active’ clients that have not booked a forward appointment for any service. A client is automatically added to this list when no forward appointment exists in the system. You can choose the maximum number of days shown for ageing last attendance, when setting up Visual Outcomes. The number count of clients in the list is shown.



A client is automatically taken off the NFA list when they book a forward appointment. A client can also be removed by being manually transferred to the Suspended List or being marked as ‘inactive’ in the Client Wizard.

A client can also be removed by:

- Transferring to the *Suspended List* (see below) by highlighting the client in the list and using the action x ; or
- Being marked as ‘inactive’ in the client’s details through the *Client Wizard*.

You can choose, when setting up Visual Outcomes, the maximum number of days shown for ageing last attendance. The number count of clients in the list is shown.

Suspended

This list is to ‘warehouse’ clients who would normally appear on the *No Forward Appointment* list but have a basis for not doing so (e.g. overseas, in hospital, on leave).

The client is only added to this list by manual means – actioning the ‘x’ in the *No Forward Appointment* list. A client is automatically taken off this list when the client books a forward appointment.

To remove a client from the *Suspended List*:

- highlight the client in the list and use the action ‘x’; or
- Mark as ‘inactive’ in the client’s details through the *Client Wizard*.

If the client is removed from the suspended list without having a forward appointment, and still marked as active, he or she will automatically be returned to the No Forward Appointment list

Standby

The *Standby* list is a status list of *Standby* appointments currently in the system. It shows Standby requests for appointments from today forward – not historical.

To view a client’s full standby history:

- Highlight the client in the *Standby* list;
- Click the three dots (...) to push the client to the *client director*;
- In the *Client Director* select *Management Info* and select *Appointments*;
- Open the *Standby* tab.

To make a standby appointment:

- Use the *Standby* column in the Appointment Calendar;
- For more detail, refer to ‘Making an Appointment’.

Service:

Notification

The *Notifications* list shows clients that need to be contacted before specified appointments e.g. long appointments. The selection of services and the notification period is set in the services tab in the *Services Wizard* accessed through the *Clinic Set Up* tab in the *Navigator*.

Milestones

The *Milestone* list allows monitoring of numbers of services for a client e.g. notifies you of clients who are coming in today and who have reached 12 visits since last detailed examination. Relevant parameters are entered in the *Service Monitor* tab in the *Services Wizard* accessed through the *Clinic Set Up* tab in the *Navigator*.

General:

Plan Instalments

The *Plan Instalments* list monitors existing Instalment Plans – e.g. the amount overdue and amount approaching.

Special List

The *Special List* is a particular note facility enabling issues relating to a client to be highlighted. Its use can be fashioned to the preferences of your practice. You should develop clear protocols for differentiating the use of all note functionality. Notes include:

- **Special** – appears both as a *yellow triangle* icon on the client's appointments and showing in the *Client Director*;
- **Single Appointment Note** – generated in the *New Appointment* window when making a new appointment (specific to that appointment only) and appears on the appointment as a notepad icon;
- **General note** – created through the *Client Director* and appearing in the *Client Director*;
- **Stock note** - created through the *Client Director* and appearing in the *Client Director*;
- **Permanent Appointment Note** - created through the *Client Director* and appearing in the tool tip when the cursor is hovered above any appointment for the client in the *Appointment Calendar*.

Recall List

The list identifies for today and earlier dates the clients who have been marked for recall. Recall can be based on any number of recall types, which are established using the *Domain Manager*.

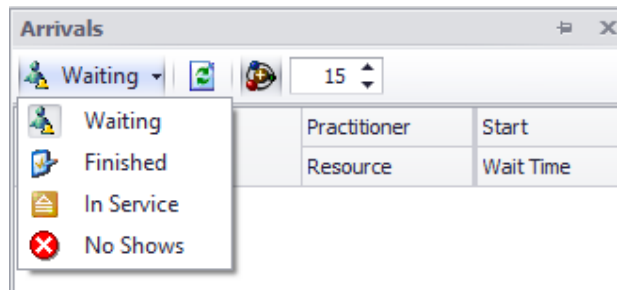
The list can be reviewed for telephone recalls. It is also possible to use the *Messaging Wizard* to e-mail or SMS messages to the selected population.

7. Arrivals

Arrivals records the order of clients being marked as arrived in the clinic. It is the equivalent of the traditional sign in sheet. By default, it is docked to the right hand side of the *Appointment Calendar*.

The *Arrivals* screen also shows how long a client has been waiting from the time they were marked as arrived into the practice to the time they commence treatment. It also displays the name of the resource allocated to this appointment e.g. Treatment Room 2.

Click on the Waiting button to change the mode for Arrivals screen. To close the Arrivals screen, click once on the [x] icon.



8. Working with Wizards

VISUAL OUTCOMES uses the concept of 'Wizards' extensively. A *Wizard* can be best described as a series of data entry screens that has a strict sequence of steps. This format is to ensure that all data elements are completed and the current process completes properly.

Structure

There are three primary elements to a Wizard:

1. Introduction:

- a. This introduces you to the current tasks and usually presents two basic modes of operation:
 - i. 'Creating'; and
 - ii. 'Editing'.

2. Data Entry Steps:

- a. These steps provide the data entry portion of the Wizard;
- b. Each step must be completed before you can continue to the next step.

3. Exit:

- a. At the end of a Wizard, an exit screen will appear that allows you to 'Restart the Wizard' or produce an output from it.

Basic Elements

To maintain a consistent appearance, there are several visual controls that appear in all Wizards:

'Exit' button:

- This allows you to exit a Wizard;
- Depending on the current state of the Wizard, this option may not be able to be completed.

• Progress Bar:

- This provides a visual cue for determining your progress through a Wizard.

• 'Next' or 'Save' button:

- This button moves the Wizard to the next step;
- This step usually causes the system to save the current data;
- If the current step is not satisfied, the system will disallow movement to the next step and ask you to complete the step properly.

• 'Back' button:

- This button moves the Wizard back a step;
- Depending on the current state of the Wizard, this option may not be able to be completed or may be disabled.

• Restart:

- Click this button to start the wizard again.

- **Description:**

- Each step within a Wizard provides instructions and title.

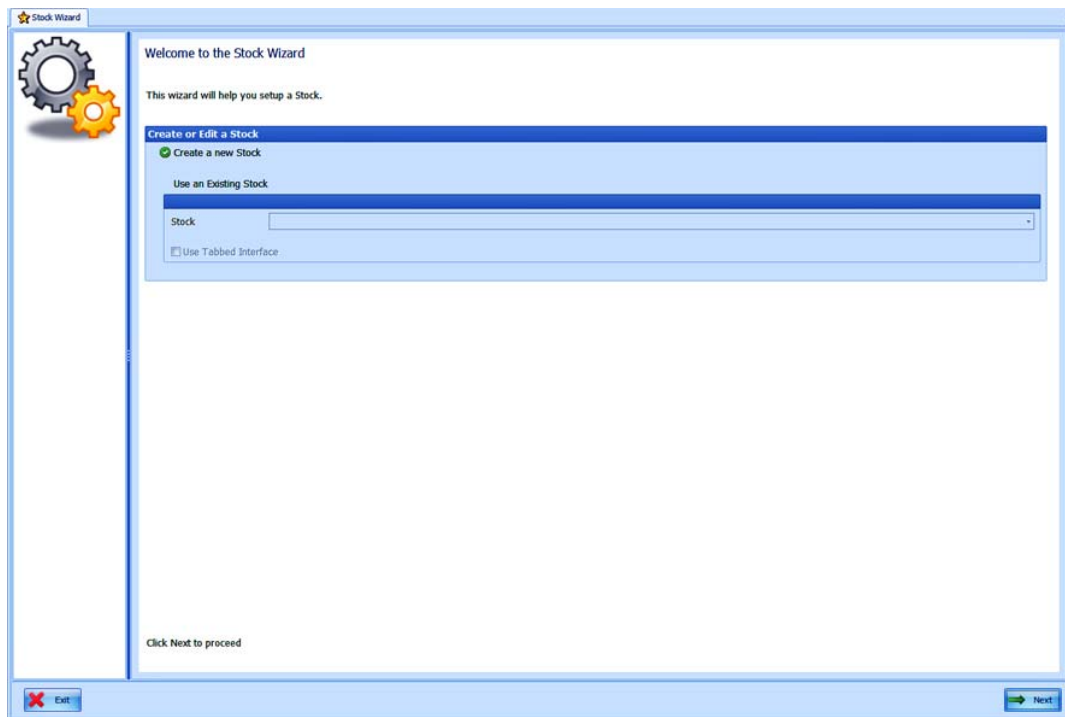
Modes of Operation**Create:**

- When selected, the Wizard will perform a strictly sequential operation. This mode requires each step to be completed in a set sequence.

Editing:

- When selected, the Wizard provides an option to be displayed as a “tabbed” appearance, making navigation to various steps quicker. When another step is selected, the previous step is automatically saved. You may notice that the ‘Next’ button has changed to a ‘Save’ button. This allows you to save the current data elements without moving to another step.

8.1 Examples of Wizard Windows

Stock Wizard – Introduction:

Data Entry Step:

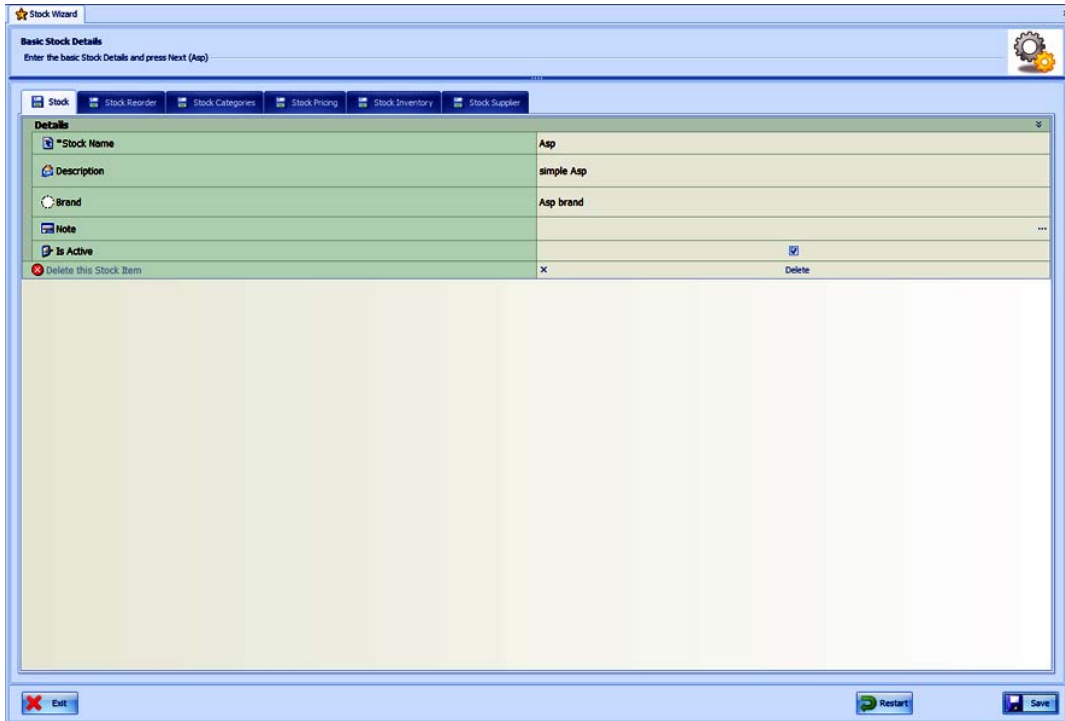
Details	
Stock Name	St
Description	
Brand	
Note	
Is Active	<input checked="" type="checkbox"/>

Exit Step:

Wizard completed

Click to Start the Wizard again

Existing – Tabbed Appearance:



Move on to Part 2.