

# Visual Outcomes Front Desk Management Part - 3

Project No. 214548  
Job Aid

Job Aid

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Business area: Planning and Projects

**Training Manual Structure;**

This manual is Part 3 of 6 parts. Version control, sign off and distribution are contained in part 1 only.

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

Contents

1. Screen Settings ..... 4

2. Windows, Docking ..... 5

3. Data Filter ..... 7

4. Stock Browser..... 10

5. Fee Schedule Browser ..... 12

6. Client Financials ..... 14

7. Messaging ..... 17

8. Document Manager ..... 26

9. Basic Management Statistics ..... 31

10. Roster ..... 33

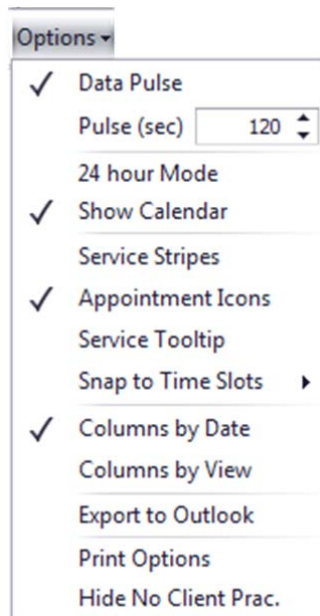
\* \* \* \* \*

Part 3 focuses on Front Desk Management and some of the more complex procedures that will help your practice run efficiently.

## 1. Screen Settings

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

**Go to the Appointment Calendar, Options menu:**

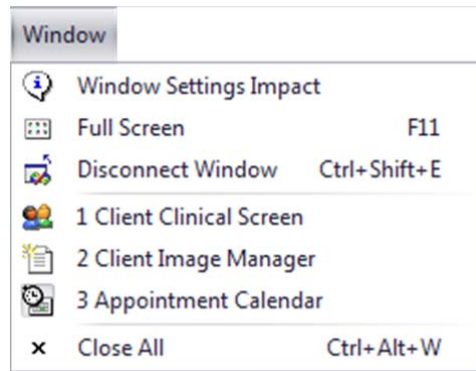


- Use "Appointment Icons" to turn the Appointment Icons on or off;
- Use "Service Stripes" to turn the Service Stripes on or off;
- Use "Service Tooltip" to turn the Service Tooltips on or off.

## 2. Windows, Docking

The Visual Outcomes interface may appear daunting at first. Don't panic! You will soon learn that it's not as complex as it appears at first and will come to appreciate the power it can give you in maximising your clinic's potential.

### Window Menu



**Window Settings Impact:**

Displays in the upper right the Settings currently affecting the currently selected window.

**Full Screen:**

- Causes the application to switch between full screen and normal mode;
- Use F11 to switch manually;
- When in *Full Screen* mode, the Menu is hidden, so you need to use the *Navigator View* to access other visual elements.

**Disconnect Window:**

- Allows you to disconnect the active window.

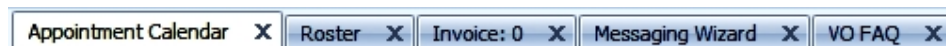
**Open windows list:**

- Shows you a list of windows already opened.

**Close All:**

- Closes all active windows.

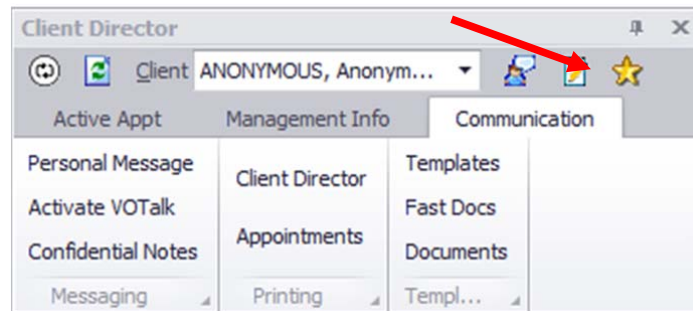
Visual Outcomes has a Windowed or “Tabbed” appearance:



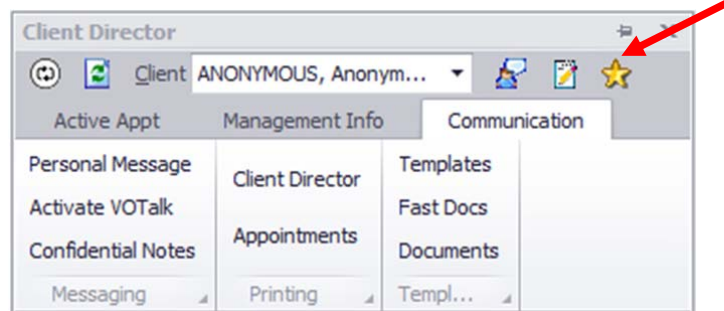
You can open as many Windows as you need. You can also dock some of the Windows, allowing them to slide in when needed and clear up your screen at any other time.

### Following are some examples of “pinning”, “docking” and moving windows:

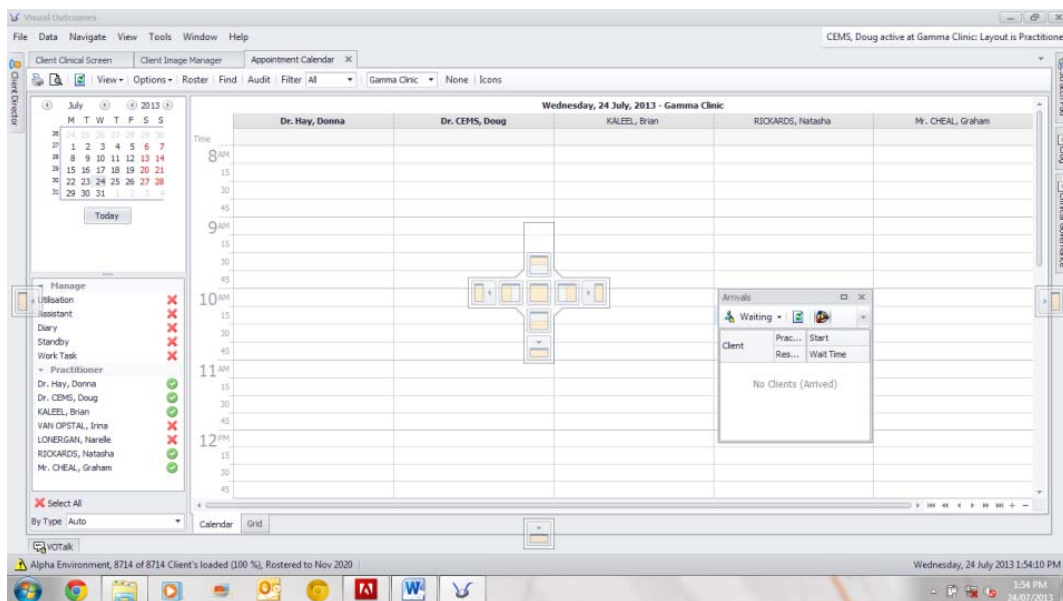
To “pin” a window to display it on your screen, press the icon indicated by the arrow. It should be pointing down;



To allow a window to disappear from your screen, “dock” it by pressing this icon to face sideways;



Windows can be moved around the display screen and placed wherever you want them:



To do so:

- First pin the window;
- Then place the mouse cursor on the Title Bar at the top of the window, press the left mouse button down and drag the window over the display screen;
- A placement window will appear on your screen - drag the window over the placement icon until a blue shadow appears where the window can be dropped then release the mouse.



### 3.1 Filtering

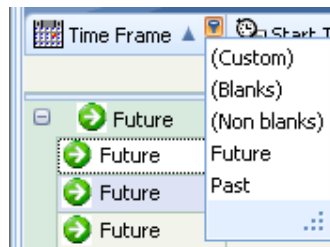
When you hover the mouse cursor over a Column, a small Filter icon will appear. By clicking this icon, a list of values is displayed. Selecting a value will cause the grid to filter the rows of data that match this criterion;

Notice also at the bottom of the grid there's a 'filter criteria' displaying the currently active filter as well as an 'Edit Filter' button. Play around with all these options to see the power it gives you;

You can also activate a Column menu that contains a link to the *Filter Editor* by right-clicking it;

There is no limit to the number of Columns that can be filtered.

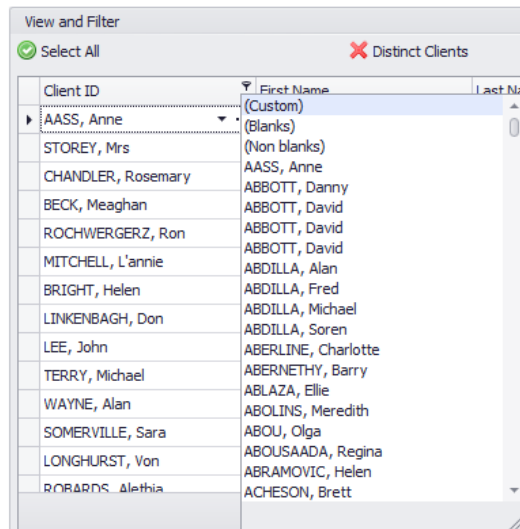
The Distinct Client button, when selected, will ensure a client is only displayed once even if they are returned multiple times. e.g. When running an appointments statistic, if the client has multiple appointments they will only be returned once.



### 3.2 Custom Query

Use this filter to apply user defined conditions to data, (e.g. those who use an external payer.):

Click on the 'pin' icon in the 'ClientID' column and select 'Custom' from the menu.





View and Filter

Select All  Distinct Clients

Client ID	Payer Type	First Name
▶ AASS, Anne ▾ ...	External Payer	ANNE
ABBOTT, Danny	Self	DANNY
ABBOTT, David	Self	DAVID
ABBOTT, David	Self	DAVID
ABBOTT, David	Self	DAVID
ABDILLA, Alan	Self	ALAN
ABDILLA, Fred	Self	FRED
ABDILLA, Michael	Self	MICHAEL
ABDILLA, Soren	External Payer	SOREN
ABERLINE, Charlotte	Self	CHARLOTTE

Custom AutoFilter

Show rows where:

Payer Type

Equals ▾ External Payer

And  Or

Is not blank ▾ (Enter a value)

OK Cancel

Remember to use 'Or' if selecting from the same Column and check that you used exactly the same spelling as in the table.

Deselect (reverse selected 'Custom' filter) is available through a tickbox in the Query summary (tick = selected, empty = back to previous selection).

[Payer Type] = 'External Payer' And Not Is null or empty([Payer Type])

[Payer Type] = 'External Payer' And Not Is null or empty([Payer Type])

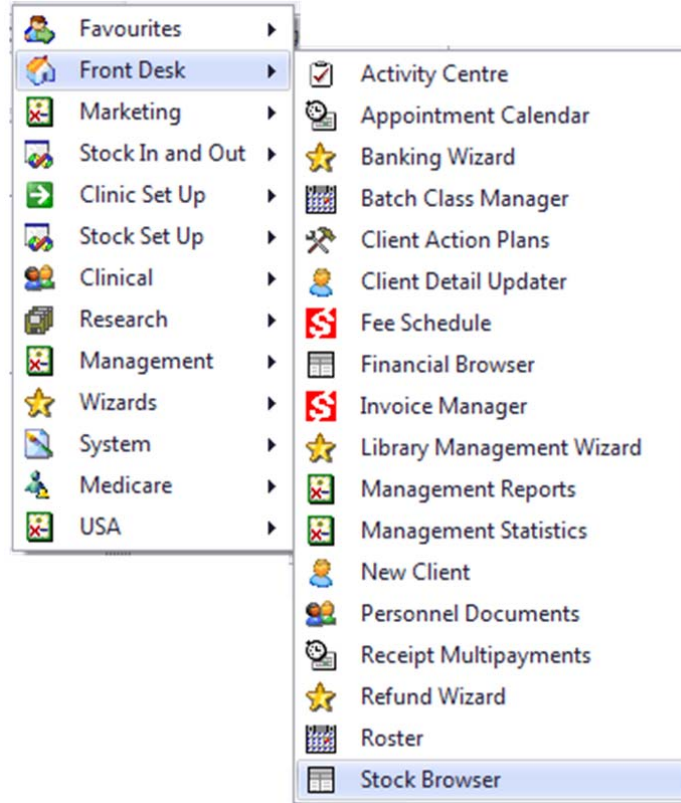


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### 4. Stock Browser

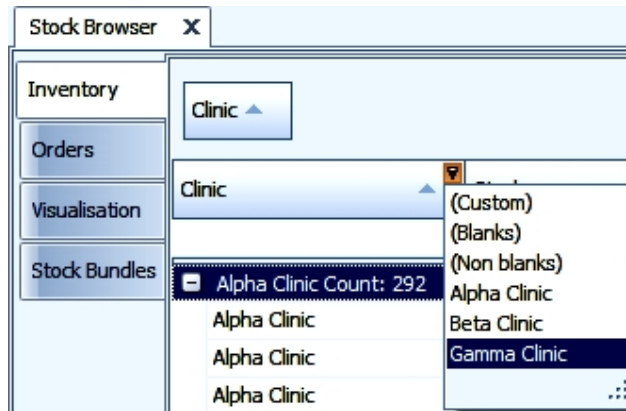
Visual Outcomes provides you with a quick and easy way to query stock prices by using the *Stock Browser*, as follows:

- Select the 'Stock Browser' from the *Front Desk* tab in the *Navigator*;

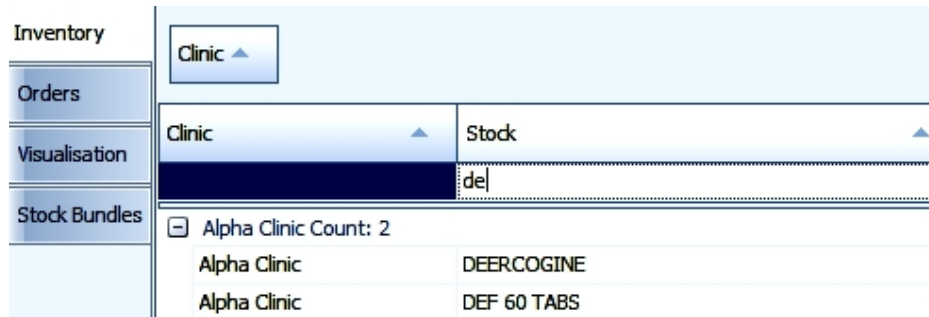


Supplier	Category	Clinic	Stock	Pre...	Retail	Tax ...	Tax	Order Status	On Hand	Days since R...	Difference	Maximum Prefe...
<b>Alpha Clinic Count: 297</b>												
HEALTH WORLD	Catego...	Alpha Clinic	ACCETYL CARNATINE	\$4...	\$45.99	Always	None	On Order	-3	827	-6	3
TMS		Alpha Clinic	ACTIVATED B6 - 50 tabs	\$3...	\$34.29	Always	None	Not Needed	3	561	0	3
LIFE SPAN		Alpha Clinic	ADENOSINE	\$3...	\$39.00	Pract...	GST	On Order	1	2255	-3	4
FIT SALES		Alpha Clinic	ADRENOPEX CAPS.	\$2...	\$27.67	Always	None	On Order	2	41	-4	6
BRAUER PROFE...		Alpha Clinic	ADRENOSTRESS 20ml	\$3...	\$32.87	Always	None	Needs Orde...	9	41	-1	10
Samco		Alpha Clinic	ADVACAL	\$2...	\$20.66	Always	None	Not Needed	-13	1780	-13	0
LIFE SPAN		Alpha Clinic	ALCAR POWDER 50G	\$5...	\$51.00	Always	None	Not Needed	6	41	3	3
HEALTH WORLD		Alpha Clinic	ALLERGENICS RESPIRA...	\$6...	\$71.91	Always	GST	On Order	5	1714	1	4
NET		Alpha Clinic	ALLERGY - NET REMEDIES	\$3...	\$39.60	Always	None	Not Needed	4	2260	0	4
LIFE SPAN		Alpha Clinic	ALLERGY PRONE	\$1...	\$10.89	Pract...	None	Not Needed	-1	1752	-1	0
FIT SALES		Alpha Clinic	AMINOPEX	\$3...	\$37.64	Always	None	On Order	2	2255	-2	4
BRAUER PROFE...		Alpha Clinic	ANAS B FLU CONTROL S...	\$2...	\$29.09	Always	None	On Order	5	1713	-1	6
US GAMES		Alpha Clinic	ANGEL CARDS	\$4...	\$45.00	Always	None	On Order	-3	2278	-7	4
LIFE SPAN		Alpha Clinic	ANTIBACTERIAL HONEY...	\$2...	\$25.20	Always	None	Not Needed	0	10000	0	0
										Count: 763		
										Units:...		

- Filter for the Clinic;



- Filter for the Stock Item.



You can also use the tabs in the *Stock Browser* to overview current Stock Orders, check the contents of Stock Bundles, update stock price and set up GST rules.

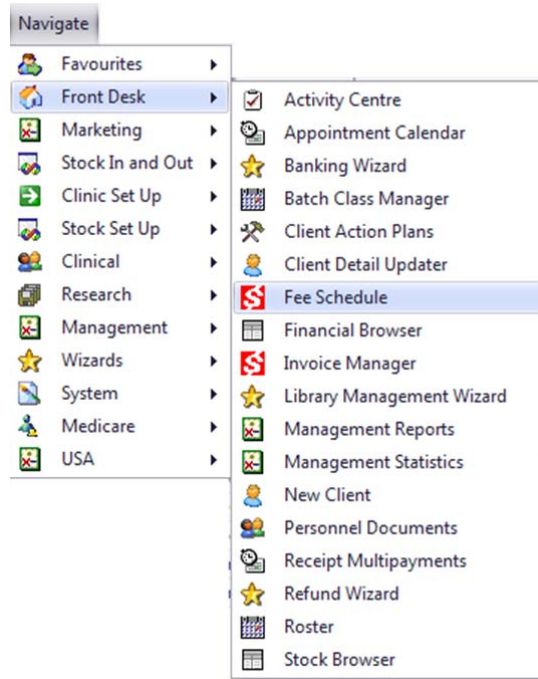
**Note:** For more information about GST rules refer to "Tax Setting" in Part 4.



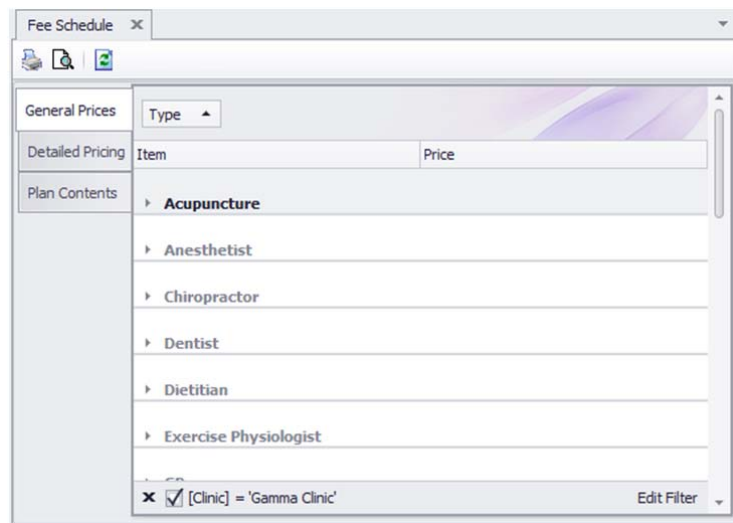
<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-3/>

## 5. Fee Schedule Browser

Visual Outcomes provides you with a quick and easy way to query all services available at the clinic, health codes and appointment fees, by using the *Fee Schedule*. The *Fee Schedule* is located through the *Navigator* in the *Front Desk* menu:



The *Fee Schedule* window looks like this:



The tabs in the *Fee Schedule* window will also provide you with Service Pricing and Plan Contents details:

General Prices			Price		MAF		Clinic Name		Price Type		
Detailed Pricing							Gamma Clinic				
Plan Contents			Type	Service	Practitioner	Price	MAF	Adults	Children	IN - HOUSE	Standard
			Acupuncture	15 min appointment	Dr Donna Hay						\$0.00 \$0.00
				30 min appointment	Dr Donna Hay						\$0.00 \$0.00
				60 min appointment	Dr Donna Hay						\$0.00 \$0.00
				AA&R	Dr Donna Hay						\$77.00 \$0.00
				BB&B	Dr Donna Hay						\$90.00 \$0.00
				C010	Dr Donna Hay						\$52.00 \$0.00
				Comparative Exam	Dr Donna Hay						\$90.00 \$90.00
				Extended Consultation	Dr Donna Hay						\$55.00 \$75.00
				Follow Up Acupuncture	Dr Donna Hay						\$60.00 \$0.00
				Follow up appointment	Dr Donna Hay						\$35.00 \$0.00
				Free Plan Service	Dr Donna Hay						\$0.00 \$0.00
				Functional Evaluation Consult	Dr Donna Hay						\$0.00 \$0.00
				Health Assessment	Dr Donna Hay						\$0.00 \$0.00
				Initial Acupuncture Consult	Dr Donna Hay						\$120.00 \$0.00
				Initial Chiropractic Consult	Dr Donna Hay						\$90.00 \$90.00
				Initial Osteopathy Consultation	Dr Donna Hay						\$60.00 \$0.00
				Initial appointment	Dr Donna Hay						\$60.00 \$0.00
				Osteopathy Consultation	Dr Donna Hay						\$66.00 \$0.00
				Pre-Employment Medical	Dr Donna Hay						\$0.00 \$0.00
				Report of Findings (R.1)	Dr Donna Hay						\$90.00 \$90.00
				Report of Findings Consult. (R.2)	Dr Donna Hay						\$90.00 \$90.00
				Standard Consultation	Dr Donna Hay						\$55.00 \$55.00
				Vaccination Visit	Dr Donna Hay						\$0.00 \$0.00




<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-3/>


## 6. Client Financials

A large part of managing the front desk includes an understanding of where to find financial information regarding specific clients. The Client Financials contain many tools and windows that will assist Front Desk staff in reviewing financial details in a centralised place.

To access Client Financials, push the client into the Client Director and open the **Management Tab – Finances**.

The top toolbar consists of two financial reports:

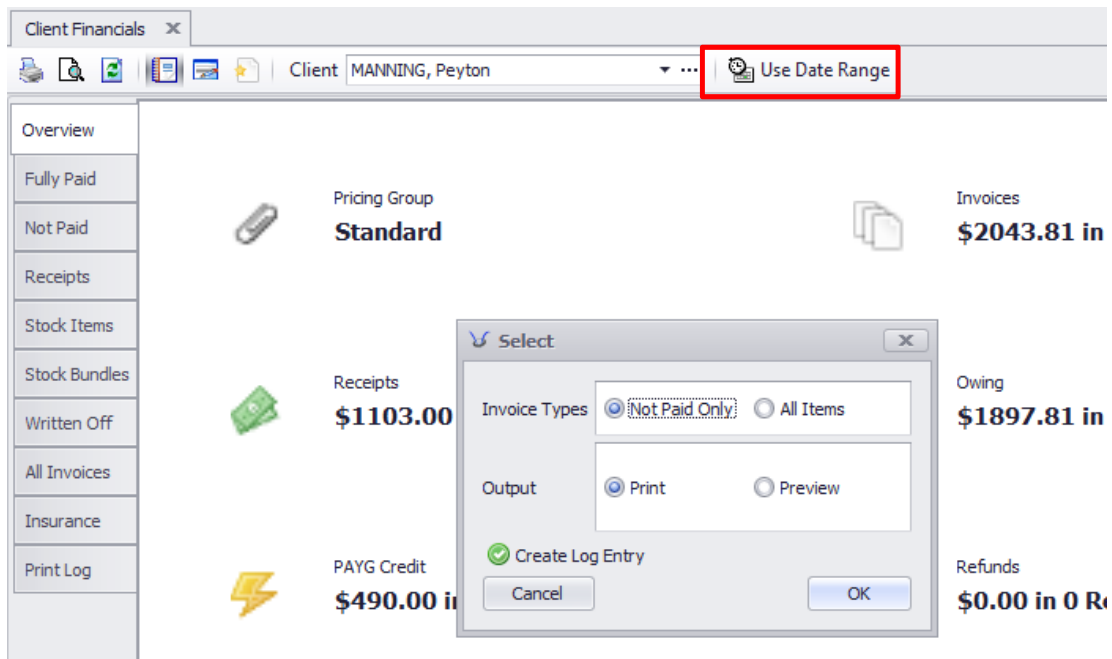
 **Invoice Transaction Report** – A report that lists all outstanding invoice items for the client during a given date range.

 **Client Statement** – A client centric statement that may be sent directly to the client to inform them about all of the invoices and receipt transactions during a given time period.

### 6.1 Invoice Transaction Report

Users run the report for an individual client in **Client Financials** by specifying the following criteria in a single dialog box:

- **Invoice Types** by 'Not Paid Only' or 'All Items'
- **Output** by Print or Print Preview
- Whether or not to **Create a Log Entry** in Print Log tab of the Client Financials
- Click **OK** then select the **Date Range**:



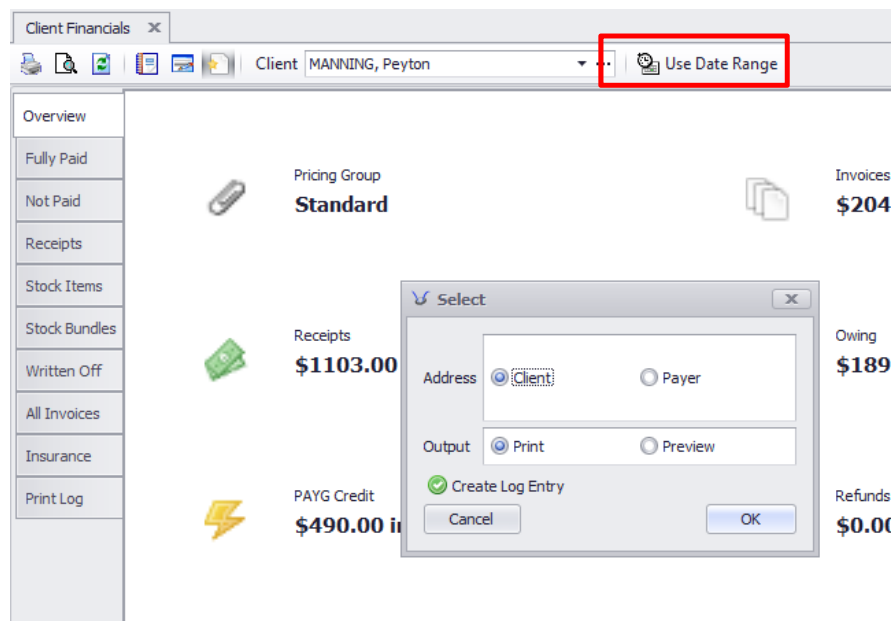
Category	Option	Description
----------	--------	-------------

Invoice Type	Not Paid Only	The document will only display invoices that have a balance
Invoice Type	All Items	The document will display all invoices
Output	Print	The document will be sent to your default printer
Output	Preview	The document will open in a preview window within Visual Outcomes
Create Log Entry	On/Off	Tick this option on if you'd like a record of this print logged under the Print Log of the Client Financials.

## 6.2 Client Statement

Users run the report for an individual client in **Client Financials** by specifying the following criteria in a single dialog box:

- **Statement** addressed to 'Client' or 'Payer'
- **Output by Print** or Print Preview
- Whether or not to **Create a Log Entry** in Print Log tab of the Client Financials
- Click **OK** then select a **Date Range**:



Category	Option	Description
Address	Client	Statement will be addressed to Client's address information from the Contact Tab of the Client Wizard
Address	Payer	Statement will be addressed to the Other Payer or External Payer as specified in the Client Wizard
Output	Print	The document will be sent to your default printer
Output	Preview	The document will open in a preview window within Visual Outcomes
Create Log Entry	On/Off	Tick this option on if you'd like a record of this print logged under the Print Log of the Client Financials.

### 6.3 Using Client Financials

Each window of the Client Financials contain tables of information that may be filtered or drilled down in order to find what you need.

- **Overview** – overall financial statistics for the client at a glance.
- **Fully Paid** – all invoices by item where the invoice balance and status is fully paid
- **Not Paid** – any invoice that has an outstanding balance, which include partially paid invoices.
- **Receipts** – all receipts made by the client, where the client was the payer on the invoice
- **Stock Items** – all stock items that were invoiced for that client
- **Stock Bundles** – all stock bundles that were invoiced for that client
- **Written Off** – invoices which were written off and their write-off amount.
- **All Invoices** – all invoices generated for the client, regardless of the payer on the invoice.
- **Print Log** - creates an audit entry for every report that was run for the client in either Client Financials or from the File menu. The report name, the user who ran the report and the date range specified will be indicated in the log.



## 7. Messaging

Depending on your requirements, there are different ways of sending a message to a client through Visual Outcomes. If you need to send a one-off SMS or email message to a particular client, use the *Communication* tab in *Client Director*:

**Personal Message** - Generates a form to send a 'personal message' to the client in the *Client Director*.

**Bulk Messaging** - Use the **Messaging Wizard**.

### 7.1 Messaging Wizard

Visual Outcomes provides an inbuilt report/template mechanism that can be used to perform batch print runs, SMS sending and bulk emailing. This is also referred to as "mail merging".

There are three steps to successfully sending messages:

#### Client Selection:

- Using the integrated statistics engine, you can select from a vast array of client lists;
- You can manually choose clients as well;

#### Report/Template/Message Selection:

- Depending on the type of the message, you either select a User Template or "simple text";

#### Output:

- Activate the sending of the messages to the printer, email server or SMS provider.

Any *User Template* can be sent to the printer, SMS provider or email. When sending via SMS, it is very important to remember that only text will be sent. *User Templates* that generate images should not be used for SMS. When sending email, you can choose the format that you would like to use such as JPEG, PDF, HTML or text.

## 7.2 Getting Started

You can access the *Messaging Wizard* from the *Front Desk* menu in the *Navigator*. The *Messaging Wizard* is divided into three sections: *Sending Messages*; *Message Master*; and *Review and Test*.

Welcome to the Messaging Wizard

The screenshot displays the Messaging Wizard interface with three main sections:

- Sending Messages:** Compiling a message - you select the recipients, then the message template and the communications method.
  - Select and print a message to send by mail or fax. You can also save to the document manager for each client.
  - Select and send a message by e-mail or SMS. Messages are logged to each client's message log and attachments saved in the document manager.
  - Create and send a simple text message to many people by email or SMS. Messages are logged to each client's message log.
  - Attach an external document for bulk email. Non-personalised message to each client.
- Message Master:** The Message Master pre-sets the message template, recipients and communications method.
  - Create a new Message Master. Select the Clients and Template that will be used to form a new Message Master.
  - Manage Message Masters. Edit an existing Message Master.
  - Send out the message. Select an existing Message Master to quickly send emails and SMS messages.
- Review and Test:** Review the messages sent in the last 7 days OR test for valid email configuration.
  - Review Messages.
  - Test Email Configuration. Send an email to your FROM Address.

Under 'Sending Messages' you have four choices:

**Select and Print a message to send by mail or fax** – print/send a message based on any *User Template* to a list of clients;

**Select and Send a message by e-mail or SMS** - sends a message based on a *User Template* to a list of clients;

**Create and send a simple text message to many people by e-mail or SMS** - using a predefined "Simple Message" or your own text, you can rapidly contact your clients.

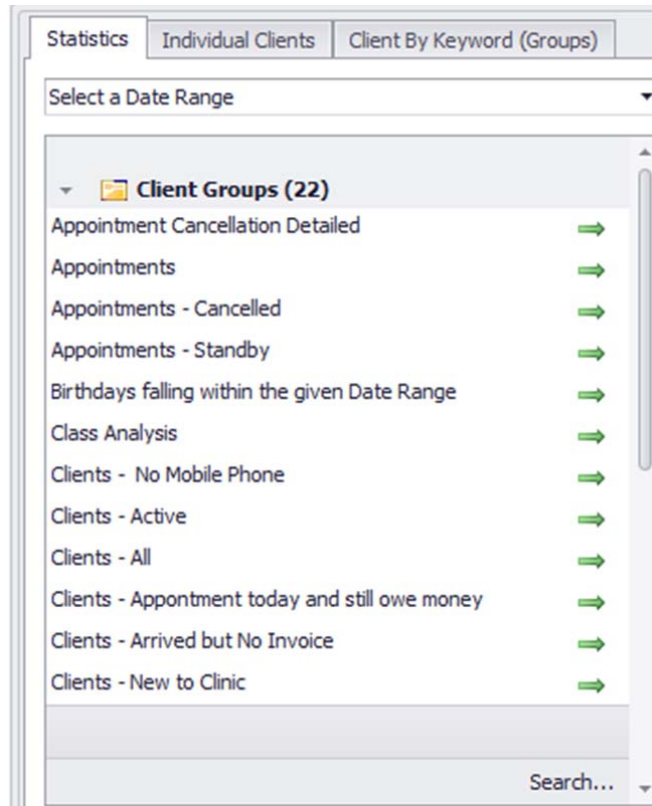
**Attach an external document for bulk email.**

Make your selection and click 'Next'.

## 7.3 Client Selection

There are three methods of selecting a list of clients:

### Use the in-built statistics:



Visual Outcomes filters the available statistics and presents those that return a ClientID:

- You will usually need to select a 'Date Range' for the statistic;
- The first five columns will be displayed, with other possible columns available from the 'Customization' window;
- By default, all clients returned by the statistic are selected (included);
- You can toggle between a client 'selection' status by clicking the 'Select All' icon;
- You can use the quick 'select' options to check/uncheck all items or just a set client number;
- Further selection is available by clicking on the 'Advanced Client Filter' button, available for all client sets within the Messaging library.

### Manually select clients.

- Select the 'Individual Clients' tab; then
- Simply use the '+' button to 'Add' or 'Remove' clients.

### Client by Keyword (Groups)

The screenshot shows a software window titled 'Client By Keyword (Groups)'. It features three tabs: 'Statistics', 'Individual Clients', and 'Client By Keyword (Groups)'. The 'Client By Keyword (Groups)' tab is selected. Below the tabs is a 'Keywords' section containing a list of four items: 'Diabetic', 'Gym campaign May 2011', 'Mother', and 'XYZ Ltd'. The 'Mother' item is selected, indicated by a checked checkbox and a blue highlight. Below the list are two radio buttons: 'AND' (selected) and 'OR'. At the bottom is a 'Show Matches' button.

To use a group of Clients by Keyword selection:

- Select the Client by Keyword (groups) tab
- Select the Keyword from the list on the left - use the AND OR buttons to select more than one Keyword – and click the Show Matches button

When your client selection is complete:

- Click 'Next' to proceed to the 'Template Selection' window.

**Note: For more information on how to create keywords in the Domain Manager and then apply them to a client, see Part 6.**

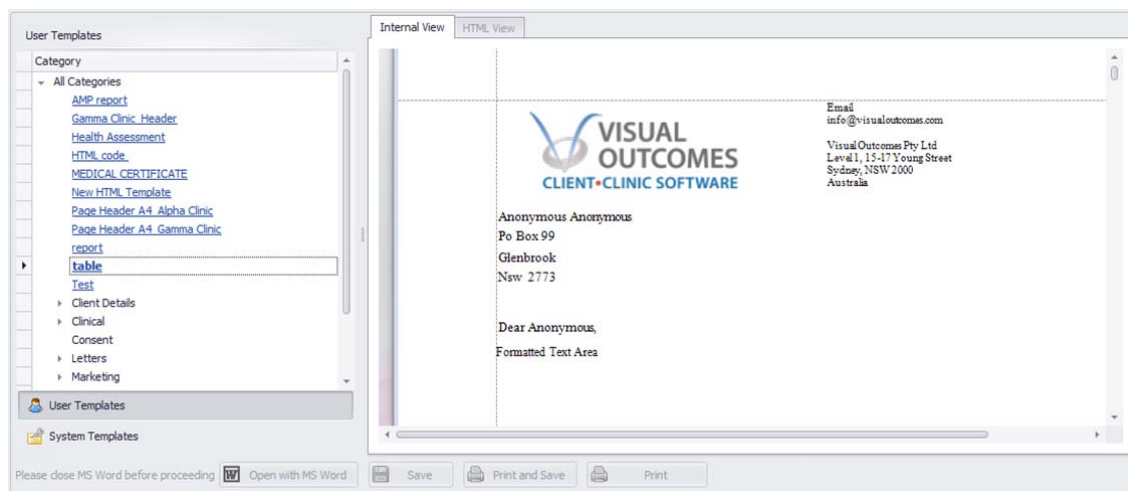
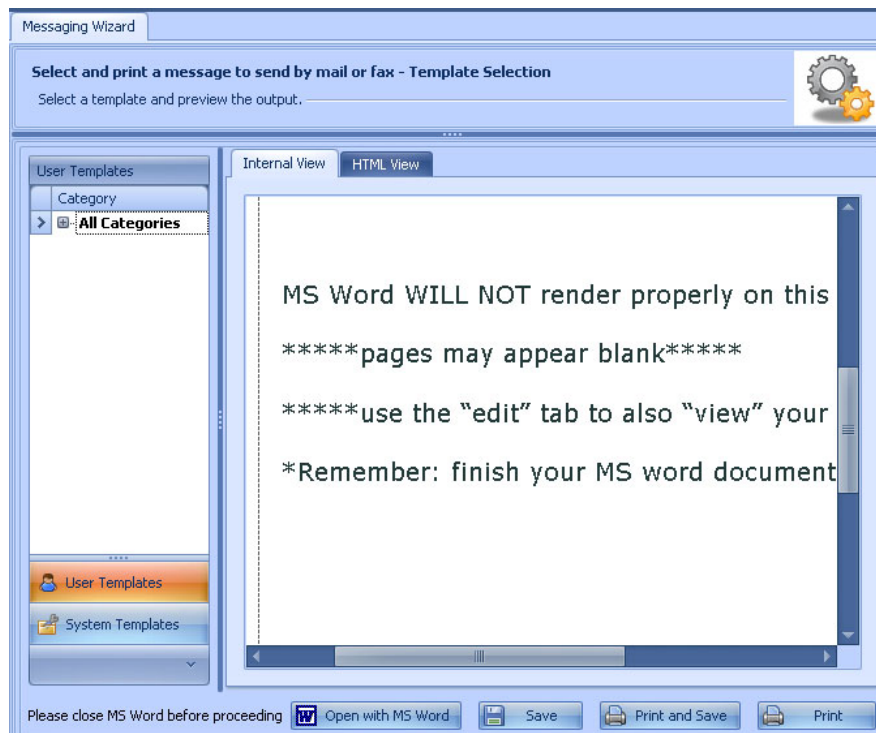
## 7.4 Message Selection

When sending bulk *Personal Messages*, you can use a pre-existing message or create your own.

Visual Outcomes will provide a list of all *User Templates* and *System Templates* that can be printed, using your predetermined client selection.

- Select the Template you need and wait for the preview to be loaded;

**Note: Please be aware that MS Word WILL NOT render in real time on this screen as you work on it. The pages will be blank/static. Use the “Edit” tab in Template Manager to view the Word document as you create it. Use “Open with MS Word” button to view in Messaging Wizard.**



- If you are printing a template, click 'Print' and then 'Next'.

**Note: printing HTML is not yet supported**

When the 'Print' button is selected, Visual Outcomes creates a copy of the document on the server and the clients who have received it;

- If you are sending an SMS or emailing, press 'Next'.

## 7.5 Select and send a message by email or SMS

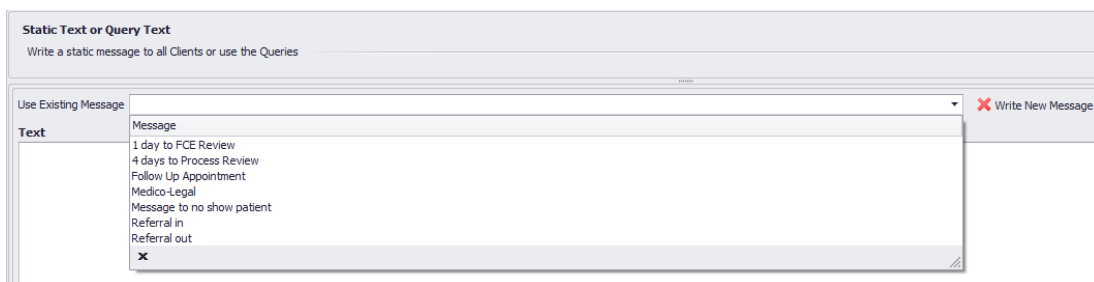
See above for instructions on Client and Template selection;

- Once the client group and template are selected, click on 'Next', select Email, SMS or Client Choice for communication media, and 'Start'.

## 7.6 Creating simple text messages

See above for instructions on Client and Template selection;

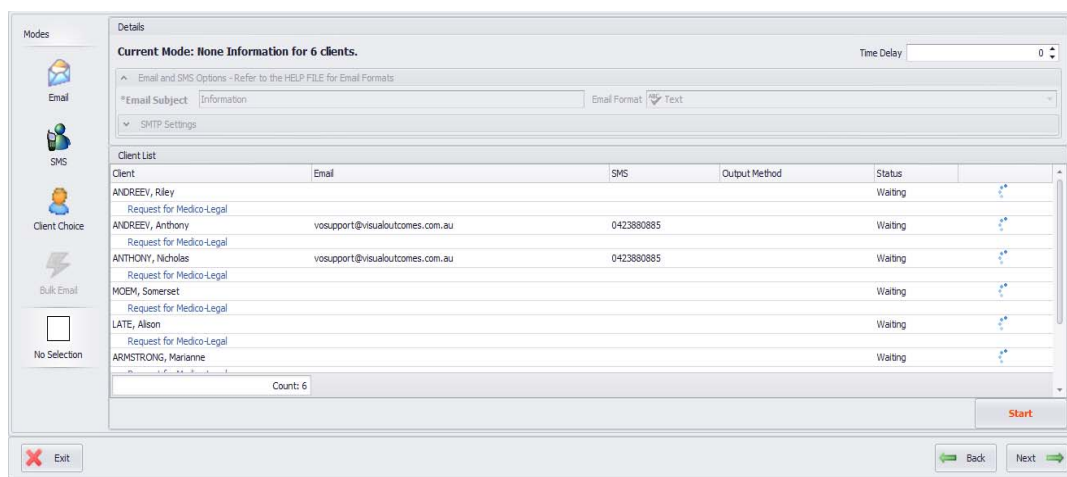
- Once the client group is selected, click on 'Next'. You can *Use Existing* simple message or *Write New Message*.



- Type your message, click 'Next', select Email, SMS, or Client Choice for communication media, and 'Start'.

## 7.7 Sending SMS and Emails

This step physically performs the sending of messages/templates. There are several settings that are displayed:



- **Email** – this option emails the template/message in the format specified. You have four choices:
  - **Text** – this option reduces the report to simple text. All images are lost;
  - **PDF** – creates a PDF document as an attachment to an email;
  - **Image** – creates a JPEG image as an attachment to an email;
  - **HTML** – creates an HTML layout with images stored online.

- **SMS** – this option sends an SMS of the template/message in text format

**Client Choice** – this option will select medium indicated in Client Wizard

Please use the *Opt Out* selection in Client Detail Updater under Navigator/Front Desk for people who don't want to receive marketing information from your practice. This will allow you to save their email addresses in the database for other contact requirements.

Client	Line 1	Line 2	Suburb	PostCode	State	Mobile	Email	Opt Out
▶ AASS, Anne	710/1A TUSCULUM STREET		POTTIS POINT	2011	NSW	0402517701	vosupport1@visualoutcom...	✘

## 7.8 Bulk messages and 'mail merge'

VISUAL OUTCOMES provides an inbuilt report/template mechanism that can be used to perform batch print runs, SMS sending and bulk emailing. This is also referred to as “mail merging”.

There are three steps to successfully sending messages:

### 1. Client Selection

Using the integrated statistics engine, you can select from a vast array of client lists;

You can manually choose clients as well;

### 2. Report/Template/Message Selection

Depending on the type of the message, you either select a User Template or “simple text”;

### 3. Output

Activate sending the messages to the printer, email server or SMS provider

Any User Template can be sent to the printer, SMS provider or email. When sending via SMS, it is very important to remember that only text will be sent. User Templates that generate images should not be used for SMS. When sending email, you can choose the format that you would like to use such as jpg, PDF or text.

### Points to note if you intend to send messages to more than 100 clients:

Use the delay setting to avoid “spam” filtering by your internet provider or server. A 20 sec delay between messages is sufficient.

It's best to set up Auto Mailer and schedule to send bulk messages after hours.



<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-3/>

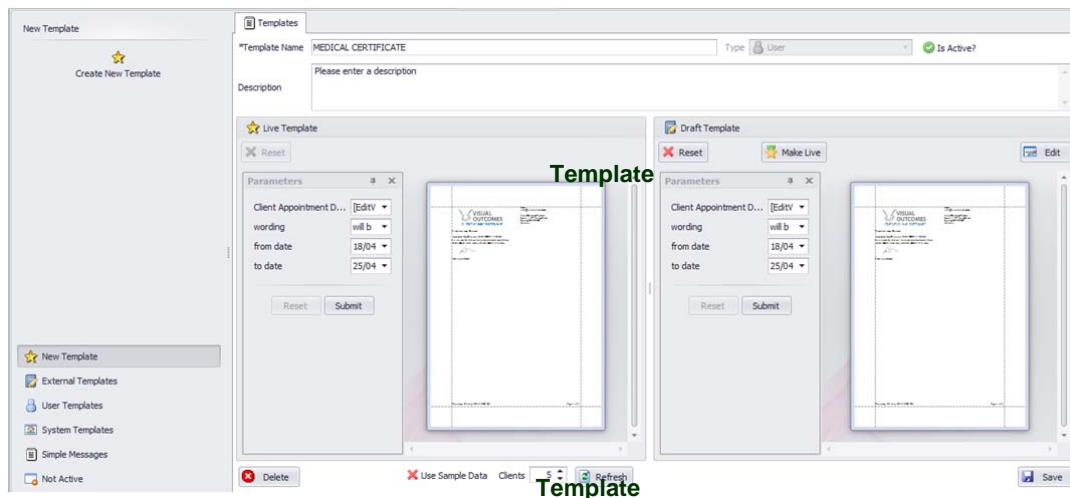
## 7.9 Introduction to the Template Manager

The Template Manager was mentioned previously in the “Message Selection” instructions and will be taught in detail in “Part 6: Visual Outcomes Champion”. Following is a brief introduction.

The *Template Manager* (document designer) enables you to manage documents within your practice without any need for external software, providing you with a fully integrated report/document creation system.

Visual Outcomes provides inbuilt templates referred to as ‘System Templates’, while the reports you create are referred to as ‘User Templates’.

The Template Manager looks like this:



The Template Manager has four areas:

### ***Template Selection***

This area contains a list of templates grouped by type. To activate a Template for editing, click the Template name and wait for Visual Outcomes to load the ‘Live’ and ‘Draft’ versions.

### ***Template Information***

This area provides details for the active template including its name, type (User or System), its active state and description.

### ***Template Preview***

Each template has two versions - the ‘Live’ and ‘Draft’ version. The *Live* version is the actual template that will be viewed from within Visual Outcomes while the *Draft* version gives you the ability to prepare a new version without disrupting normal operation.

### ***Template Action***

This is where you can Delete, Save, Refresh and add Sample Data to your template to preview.

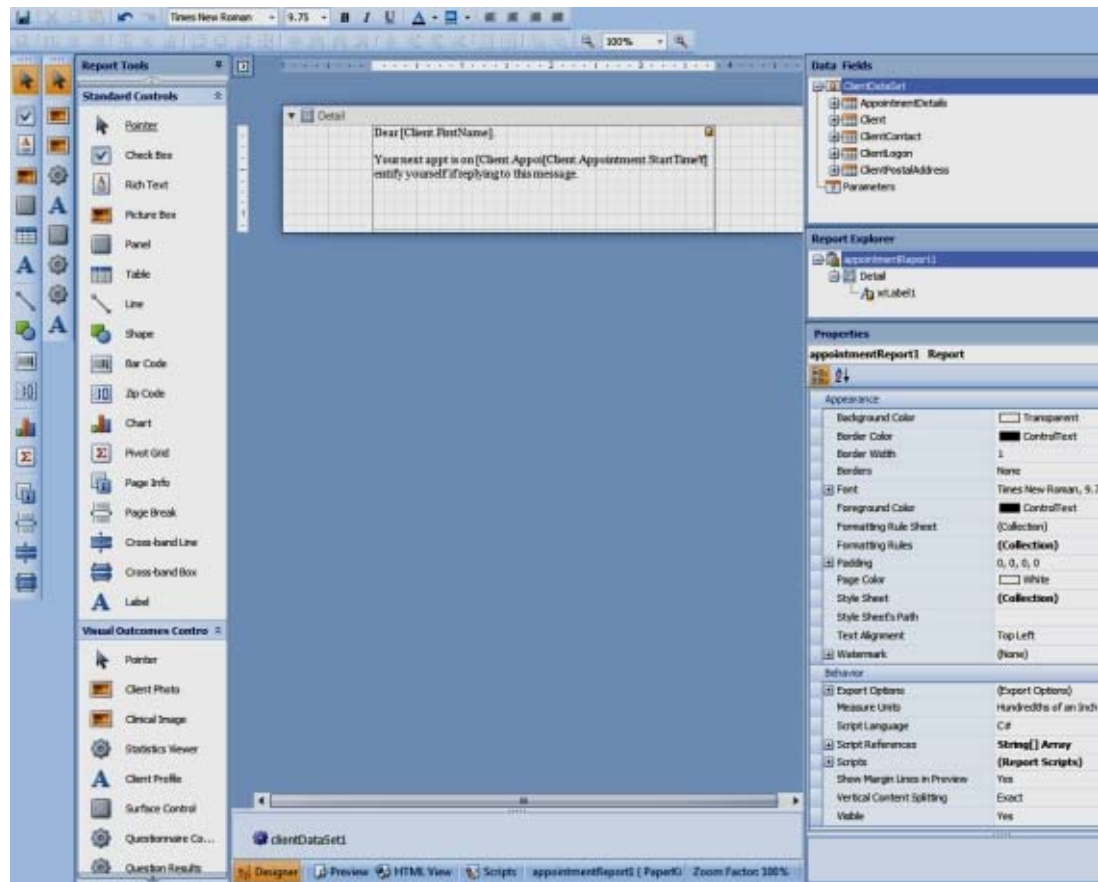


## 7.10 Template/Report Designer

Editing and New Template creation takes place in the *Template Designer*. This powerful component allows templates of almost unlimited complexity to be created.

With a vast array of tools and data to choose from, the *Template Designer* allows you to create beautiful functional documents quickly and easily.

The Template Designer looks like this:



**Note:** For more information on how to use the *Template Manager* and *Template Designer*, refer to “Part 6: Visual Outcomes Champion”.



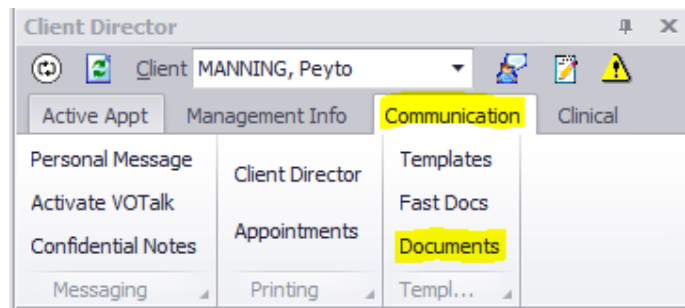
<http://visualoutcomes.com/index.php/home-secure/documentation/training/training-videos-part-3/>

## 8. Document Manager

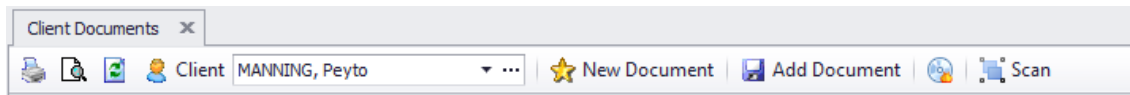
The Document Manager houses all administrative and clinical documents in the patient's file. The documents that a user can view is based on the user's security level and whether that document category is viewable by Front Desk. Please see the Part 6 manual for how to configure Template Categories to allow document categories to be viewable by Front Desk.

### 8.1 Using Document Manager on the Front Desk

You can open the Document Manager by pushing the client into the Client Director, opening the **Communications** tab and clicking **Documents**.



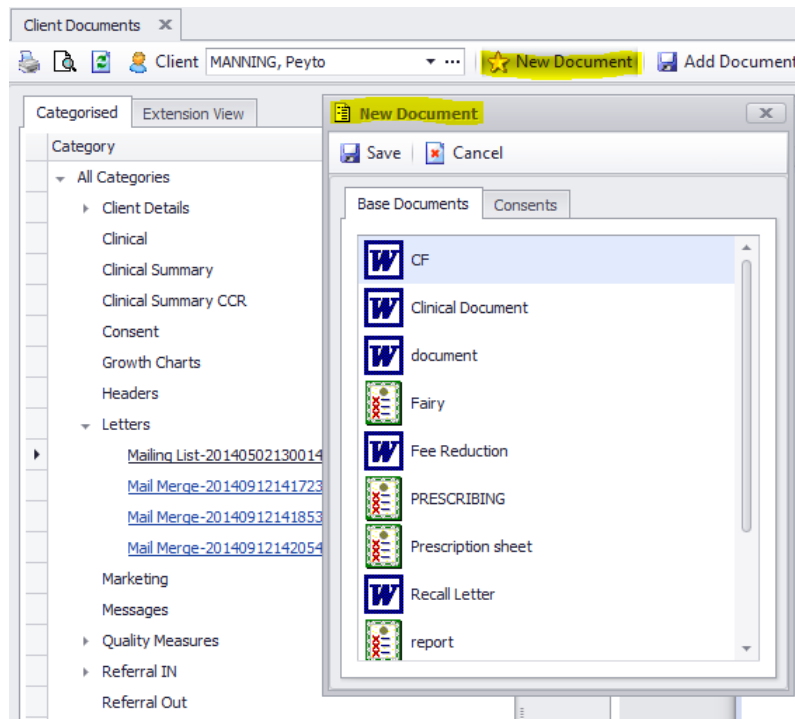
The toolbar buttons at the top of the window will enable users to perform various tasks such as uploading documents, and scanning directly into Visual Outcomes.



- **Print** – This prints out the list view of documents to your default printer
- **Print Preview** – Preview the list view of documents
- **Refresh** – Refreshes the Document Manager window
- **Client** – dropdown list of all clients. Use the (...) to push the client to the Client Director
- **New Document** – create a new document from pre-set templates
- **Add Document** – upload a document from your local PC
- **Burn Disc** – Download documents to an external source
- **Scan** – Scan documents from a directly connected USB scanner

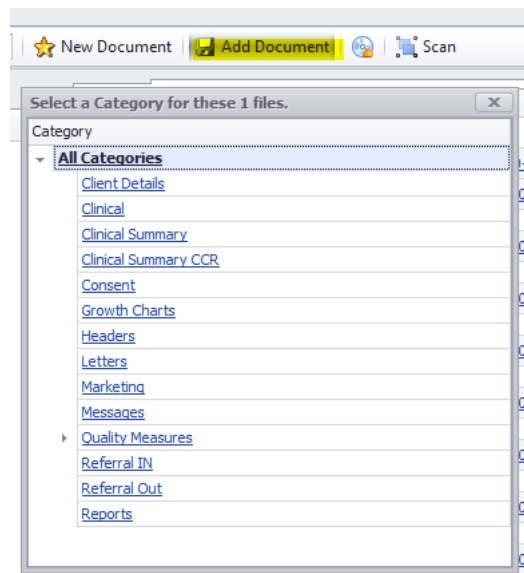
### 8.2 Creating New Documents

Click on the New Documents button in order to create a new document for the client using documents pre-established in the Document Base Manager. You may also choose from Consents created. Once the Document or Consent is selected from the list, it will appear in the appropriate Template/Document Category according to how it was configured.



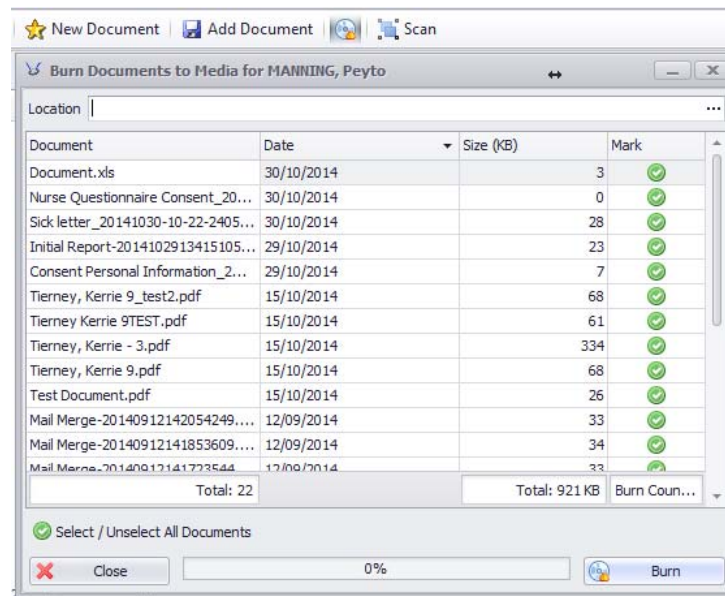
### 8.3 Adding Documents

You may upload any document to the client's file by clicking the **Add Document** button to choose from your local PC. Once you select a document you will be prompted to select which category the document should be placed.



### 8.4 Burn Documents to Media

Documents in the Document Manager may be burned to any local media source, including USB drives or locally to the PC.

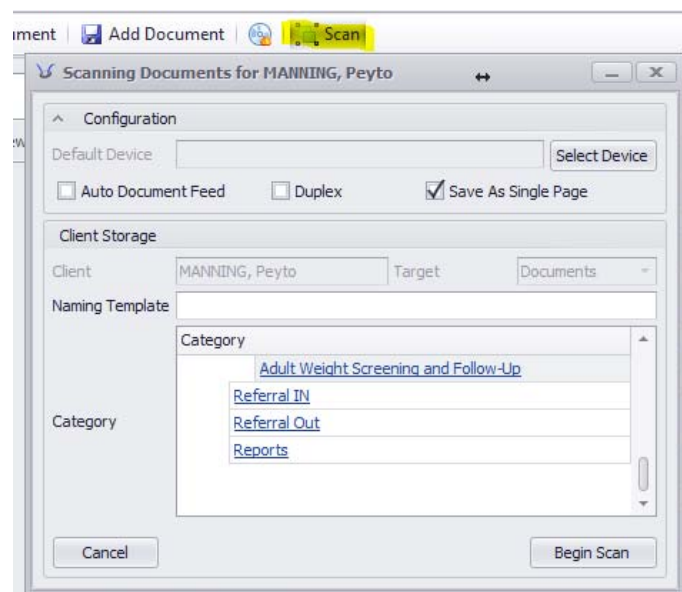


- Click on the Disc icon
- Select the location of the media device or location on your PC
- Mark the documents on the list that you wish to burn.
- You may use the **'Select/Unselect all Documents'** to mark all or none of the documents in the list.
- Click on **Burn** to start.

### 8.5 Scan Directly into Visual Outcomes

Visual Outcomes works with any scanner that is connected via USB directly to a PC.

Once you have set your scanner up to scan to a PC and downloaded the required drivers, you may scan directly into the Document Manager by clicking on **Scan**.



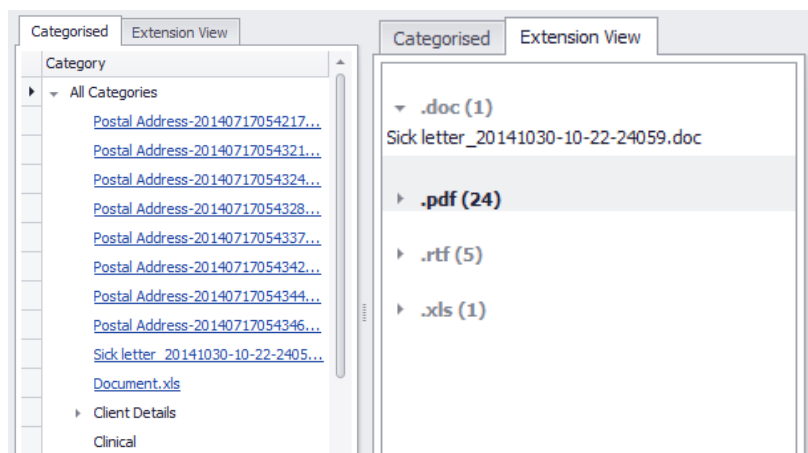
Visual Outcomes will detect the default scanner on the Windows user, however, you may also navigate to the device by clicking **Select Device**.

- **Auto Document Feed** – When ticked on, the document will be automatically scanned through the auto-feed of the scanner.
- **Duplex** – If your scanner has duplex scanning capabilities, then any document that is scanned with both sides printed, will be scanned for both sides and displayed.
- **Save As Single Page** – When ticked on, multiple pages or duplex scanning will display as consecutive pages in a single file.
- **Naming Template** – Give your file a name. Visual Outcomes will automatically append the detailed date and time as a series of numbers to create a distinct file name.
- **Category** – Once you've entered a file name, select the Document Category where the document will sit in the Document Manager.

To start scanning, click on **Begin Scan**.

## 8.6 Viewing Client Documents

All Client Documents for a particular client are listed in two tabbed views: Categorized and by Extension. **Categorized** houses all the Document Categories that a user has the security rights to view, and all the documents listed in that category. You can click on any document hyperlink to open the document locally. **Extension View** groups the documents by the type of document they are, such as, .pdf, .doc, .xls, etc.



The List in the centre of the screen displays all documents in a selected Document Category. You may also click the hyperlink to open the document directly in Visual Outcomes in the PDF View if the document type is a PDF.

List	Date	File	Size	On Local Disk?	Consented?	Consent Requirement	Action
PDF View	30 Oct 2014	Document.xls	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	30 Oct 2014	Sick letter_20141030-10-22-24059.doc	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	17 Jul 2014	Postal Address-2014071705434621.pdf	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	Printed Report of Postal Address						
	17 Jul 2014	Postal Address-2014071705434499.pdf	-1 kB	✗	✓	No Consent Required	📄 ... ✓
	Printed Report of Postal Address						
	17 Jul 2014	Postal Address-2014071705434289.pdf	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	Printed Report of Postal Address						
	17 Jul 2014	Postal Address-2014071705433702.pdf	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	Printed Report of Postal Address						
	17 Jul 2014	Postal Address-2014071705432867.pdf	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	Printed Report of Postal Address						
	17 Jul 2014	Postal Address-2014071705432414.pdf	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	Printed Report of Postal Address						
	17 Jul 2014	Postal Address-2014071705432131.pdf	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	Printed Report of Postal Address						
	17 Jul 2014	Postal Address-2014071705421701.pdf	-1 kB	✗	✗	No Consent Required	📄 ... ✓
	Printed Report of Postal Address						
	✗ [Category] = 'All Categories' Edit Filter						

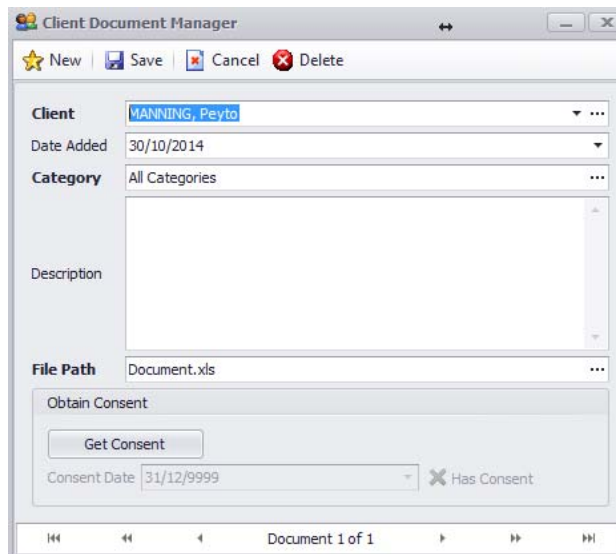
The List view gives you information on the Date, Size, whether the document exists on the local data cache, has been consented to, and further Action buttons.



You can save the document to the server if the document is saved to the local data cache (if On Local Disk? Is ticked on).



You can edit the Client Document details, or delete the document.



You can get Client Consent, if required, which will prompt the client to enter his/her VO-iSite login password.

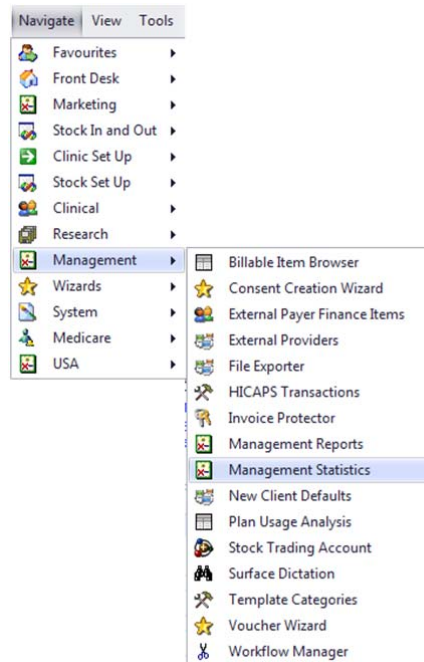


## 9. Basic Management Statistics

Access to *Management Statistics* is dictated by security authorisations set through the Security Wizard. This means that access can be restricted to selected statistics relevant for a role – e.g. Front Desk/CA or Practitioners. Refer to “Security Access Management”.

### 9.1 Using Management Statistics

You can access Management Statistics through the Management tab in the Navigator/Navigate menu. Note that the ‘Front Desk’ tab in the Navigator also provides access to certain *Management Statistics* that may be made accessible for the benefit of the Front Desk/CAs.



### 9.2 Summary of Management Statistics

Statistics are grouped under relevant headings:

Appointment Statistics

Audit - refer to the ‘Audit’ section above;

Client Report – statistics relating to clients;

Financial – statistics relating to financial outcomes. More detail to be found below under ‘Using Financial Statistics’;

KPI (Key Performance Indicator) Clinic – the raw statistics that go to make up KPI reports on a Clinic basis;

KPI (Key Performance Indicator) Practitioner – the raw statistics that go to make up KPI reports on a Practitioner basis;

Marketing – statistics relevant to marketing activity, including birthday search statistic;

Messages – statistics that drive pre-set messages to be sent using the *Messaging Wizard*;

Performance – statistics that relate to the performance of the Clinic and Practitioners against certain standard criteria;

Specific Service – statistics for each specific service in the clinic;

Statistics for Single Client Reporting – shows the Client’s Appointment Details;

Statistics for End of the Shift – statistics that CAs will find useful, automatically filtered for the logged-in user. These statistics are relevant for CA’s *End of Shift Report*;

Stock – statistics that relate to stock sales and back orders.

### 9.3 Keyword button in Management Statistics toolbar

NOTE: The Keyword button IS NOT A FILTER - you can’t use it to select clients who have a certain keyword attached to them in Client Wizard.

This button is used to Add a Keyword to a group of clients in bulk.

For example:

Run the statistic Clients – All,

Use the Filter button on the toolbar > General section > Joined After 1st May 2012 > Apply filter > the group of clients will be selected

Use the Keyword button on the toolbar > select keyword “Gym campaign April 2012” and Save – all selected clients will be marked by this keyword.



## 10. Roster

The *Roster* is important. It dictates to the *Appointment Calendar* setting:

- The Clinic hours;
- Practitioner availability; and
- The services permitted at particular times.

The *Roster* system inside Visual Outcomes is divided into three components:

- Clinic*** – the opening hours of a clinic;
- Personnel*** – the availability (opening hours) of *Personnel* during a clinic’s opening hours;
- Personnel Service*** – the availability (opening hours) of a service that a practitioner performs during the *Personnel* opening hours.

The *Clinic* roster is considered the ‘top level’ followed by the *Personnel* roster and finally the *Personnel Service*. This means that, on any given day, all three rosters (*Clinic*, *Personnel* and *Personnel Service*) must have opening hours defined before appointments can be created or modified.

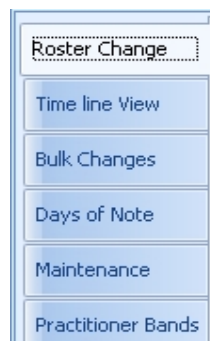
If no *Clinic* hours are defined, the *Personnel* and *Personnel Service* rosters are ignored and the entire clinic closed. If no *Personnel* opening hours are defined for a particular Practitioner, that Practitioner’s services are consider closed regardless of any clinic opening defined.

Because each day contains its own *Roster*, you are not restricted to a weekly pattern of opening hours, but can perform any complexity of frequency, e.g. every second Friday at Alpha clinic for the next six weeks.

**Note: None of the above points will delete appointments from your Appointment Calendar - this will only happen when a Practitioner has been deleted from the Visual Outcomes system. Please ensure all appointments are moved prior to deleting a Practitioner.**

Let’s take a closer look:

- Select ‘Roster’, through the Front Desk tab in the Navigator; or
- Click on the ‘Roster’ tab, located at the top of your screen, next to the ‘Appointment Calendar’ tab; or
- Select the ‘Roster’ button in the tool bar;
- Select the *Roster Change* tab.



The Roster consists of six function screens, viewed through the tabs at the top:

- Roster Changes tab*** – this is where you can make changes to the Clinic, Practitioner and Services setup in the Roster;
- Time Line View tab*** – this is a read-only screen that shows the current *Roster* setup for *Clinic*, *Services* and *Personnel*;

**Bulk Changes tab** – this is where you can create or delete Personnel and Services rostering for multiple days;

**Days of Note tab** – this is where you may add holidays or other days of note to the *Roster* that may change the opening hours, Practitioners and/or services available on that day;

**Maintenance tab** – this screen allows you to “clean up” the roster for maximum efficiency.

**Practitioner Bands tab** - this screen allows you to create visual indicators on the Appointment Calendar where certain types of services can be booked for a practitioner.

Service types are set up through the *Service Wizard*. A colour is allocated to each service when the service is set up through the *Service Wizard*.

Services that are eligible to be booked for a doctor at a given time are set up through the *Personnel Wizard*.

**Note:** For more information, refer to the ‘Setting up the Clinic and Making Changes’ section of *Visual Outcomes F1 Help*.

Now we can review the toolbar options.

**Clinic** - to open or close a day or hours for a Clinic;

**Personnel** - to open or close a particular day or hours for a specific Practitioner;

**Service** – used to specify service types available for a particular Practitioner at particular hours;

**Personnel by Clinic** – used to view a particular Practitioner’s availability across clinics;

**Service by Clinic** - used to view a particular Practitioner’s service type availability across Clinics.



Using the Roster involves combinations of the toolbar options and the function screens. The following procedures will show them in use.

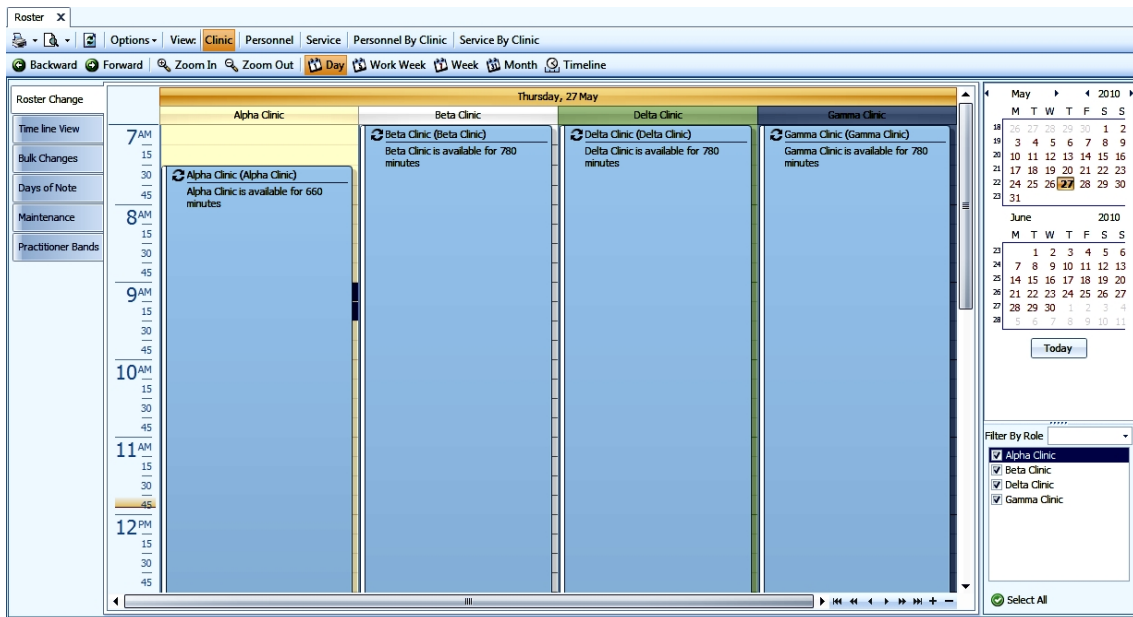
### 10.1 Creating a New Roster

When creating a new Roster or making changes to an existing Roster, it is important to always follow the sequence of “Clinic”, “Personnel” and “Service”.

### 10.2 To set up the Clinic

The following outlines how to set up the Clinic in the *Roster*, using the *Roster Change* tab (Note: these will change one day only):

- Open ‘Roster Change’ tab;
- Open in ‘Clinic’ view (refer tool bar at top of the *Roster*);



- Double click on 'Clinic' column or right click and select 'New Opening Hours', fill in details and 'Save'. Use 'Bulk Changes' tab to set up repetition;
- If the Clinic is to be closed during the day, select 'New Closing Reason'.

### 10.3 To set up the Personnel Roster

(Personnel from the top tool bar) - this step will now set up the days and hours during which the Practitioner will be in the Clinic and available for services:

- Select 'Roster', through the Front Desk tab in the Navigator;
- Select the 'Personnel' view while in the Roster Changes tab. (Note: these will change one day only);
- Double click on the new Personnel's column or right click – 'New Opening Hours';



- Complete the details and 'Save'; or
- Select the 'Bulk Changes' tab to Roster multiple days (see below).

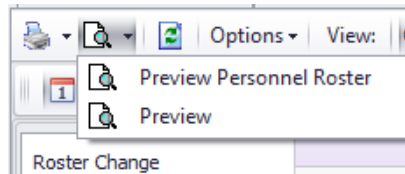
If the staff member is to have a specific break during the day:

- Right click on the Personnel’s column and select ‘New Closing Reason’;
- Complete details and ‘Save’.

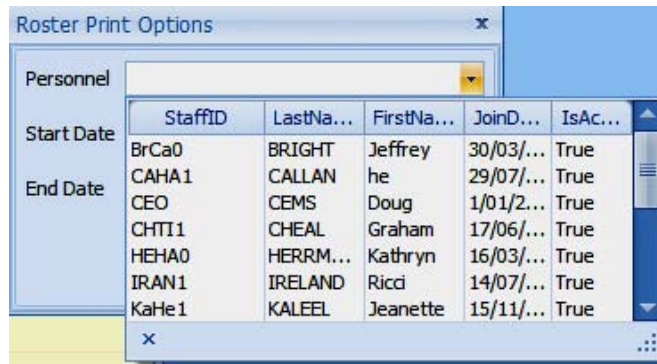
### 10.4 Print a Personnel Roster

To view and print a Personnel Roster:

- Go to the *Roster* toolbar, click on either the *Print* or *Print Preview* icon and select *Preview Personnel Roster*;

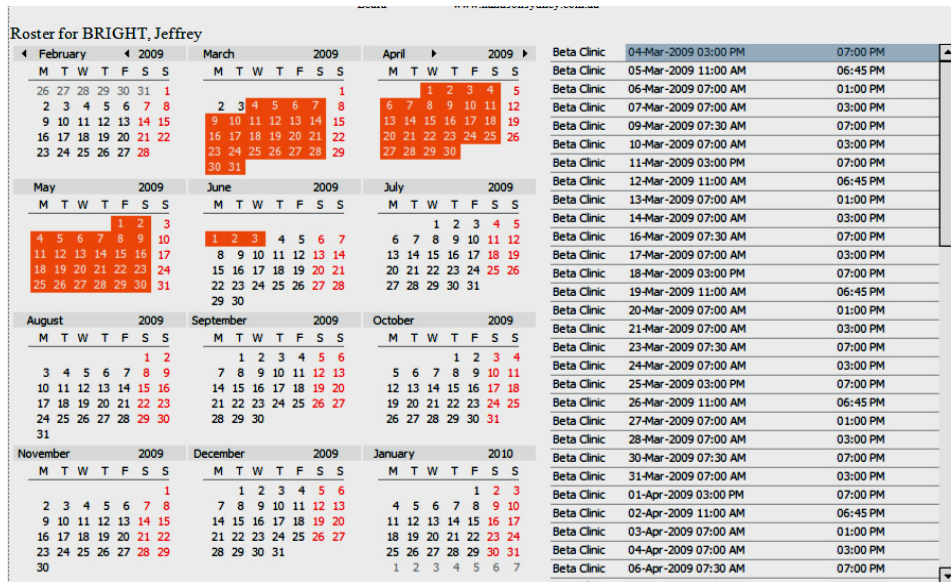


- Select the personnel from the drop down menu;



- Select *Start Date* and *End Date*, click OK;

On the right hand side of the screen you will see a calendar with the roster highlighted and a detailed list of dates, times and locations;



- Print the page using the *Print icon* on the toolbar.

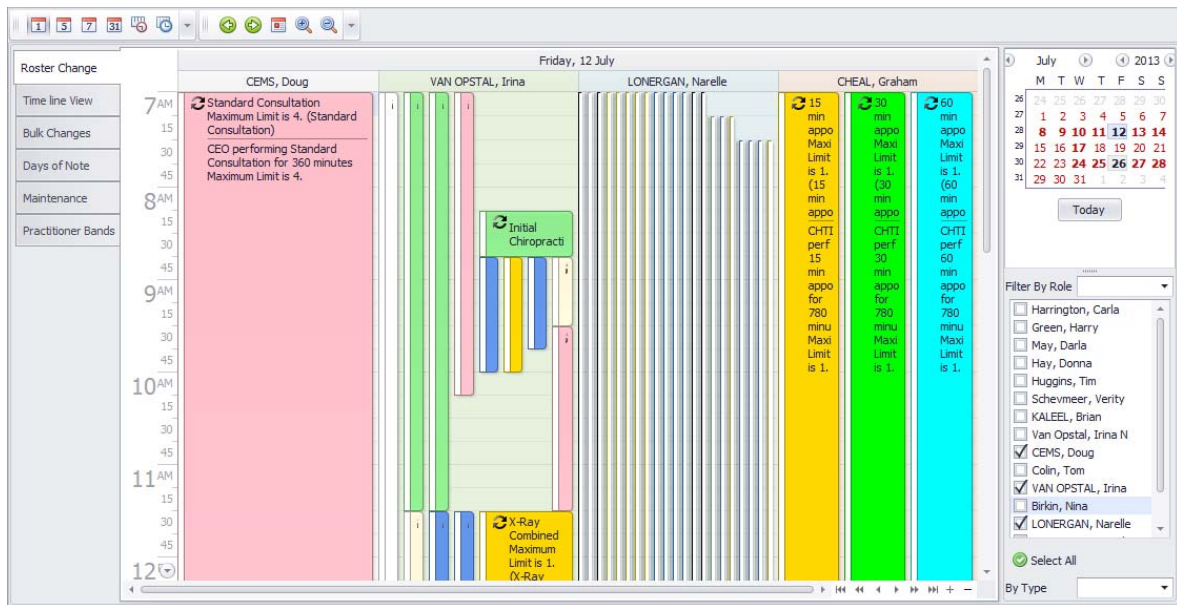
**Note: The next step is only relevant for practices that want to define specific hours for specific services. Refer to “Services Wizard” in Visual Outcomes F1 Help for more information on the ‘No Roster’ option.**

### 10.5 To set up Services

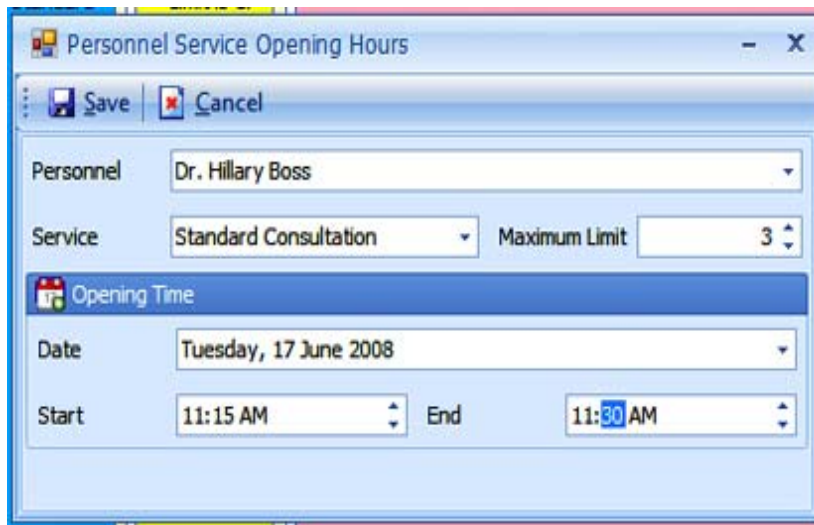
(Service from the toolbar) - this step will now set up the services that the Practitioners will be available for on particular hours.

You can create a single entry for single Practitioner by:

- Using a double click or right click on the Practitioner column and selecting ‘New Opening Hours’;



- Select the ‘Service’ from the drop down window and set up ‘Maximum Limit’ of clients to see at one time;
- Confirm ‘Date,’ ‘Times’ and then ‘Save’.



After you create one day of services you’ll be able to use it as a "template day" for “Bulk Changes”.

You should now be able to set up the Roster in Clinic, Personnel and Services for a single day or service. The next step is to become familiar with the “Bulk Changes” tab. “Bulk Changes” is to be used when your Roster requirements relate to more than one day.

**Note: Failure to use “Bulk Changes” when changing the roster for more than one day is extremely time consuming and not advisable.**

Let’s take a closer look at the “Bulk Changes” tab.

## 10.6 Bulk Changes tab

To create a new Roster this sequence must be followed:

1. Clinic hours
2. Personnel hours
3. Service

**Clinic Hours - we need to open the Clinic:**

- Select the ‘Clinic’ view from the toolbar;
- Select the Clinic you wish to open;
- Select Start Date and Time and End Date and Time according to your needs;
- Chose Day Options (how many weeks you would like this setting to be at and on which day/s it should occur);
- Click ‘Create opening hours for the roster’;
- Click ‘Update Roster’.

Now your clinic is open at the times and days you have selected.

Start	End
<b>Alpha Clinic</b>	
Wed, 31-Jul-2013 12:00	19:00
Wed, 07-Aug-2013 12:00	19:00
Wed, 14-Aug-2013 12:00	19:00
Wed, 21-Aug-2013 12:00	19:00
<b>GiBo0</b>	
Fri, 26-Jul-2013 07:00	12:30

**Personnel - you will now select when your Practitioners will be working during this time:**

- Select the ‘Personnel’ view from the toolbar;
- Select the Clinic;
- Select the relevant Personnel;
- Select Start Date and Time and End Date and Time according to your needs;

- Select the Day Options (on which days and how many weeks you wish your practitioner to work on these hours);
- Click 'Update Roster'.

Now your Practitioner is available within the clinic opening times you have created.

**Personnel Service - the next step is to add the appropriate Services to your Practitioner's new time availability:**

- Select the 'Service' view from the toolbar;
- Select the relevant 'Personnel';
- Select Options - Single Service/Service Group/From existing Date/All Services;
- Select the Service then the Maximum Limit of people you wish to see for that timeslot per service (Note: the number of people selected will relate to that service only);
- Select Start Date and Time and End Date and Time according to your needs;
- Select Day Options;
- Finally, click on the 'Update Roster' button.

You should now have your Clinic open, your Practitioner available and the Services you require at the times and dates specified.

The *Option* "From existing Date" uses the template day created in the Roster Change tab:

- Create one day of services e.g. Tuesday 4/05/10: from 7:30 am till 9am Dr. Doug CEMS will perform Standard Consultations; From 9am till 11:30 am Dr. Doug CEMS will perform Reports, Examination and see new clients; From 11:30 am till 1:30 pm again Standard Consultations and so on and so forth;
- Once you have set up the Roster for Tuesday, select the *Bulk Changes* tab, select 'Clinic', select 'Practitioner' - Dr. Doug CEMS, select 'From existing Date', select Roster Date as Tuesday 04/05/10, change 'Starting Date and Time' and 'Ending Date and Time', Select 'Day Options', 'Create opening hours for the roster' and 'Update Roster'.

To delete a Roster:

- Select 'Close opening hours for the roster' from the *General* menu, then complete other details.

## 10.7 Changing an Existing Roster

To make changes for one day, use the *Roster Change* tab, to make changes for multiple days, use the *Bulk Changes* tab.

In the *Bulk Changes* tab, the first step is to remove all conflicting and current rostering or clinic hours e.g. date/times.

## 1. To change hours for the clinic:

- Select 'Clinic' view, click 'Bulk Changes' tab, select 'Clinic'.
  - To change the starting time, simply highlight the time in the 'Starting Date and Time' window and type in the time you need; select a wide range of opening hours, e.g. Start Time 6am and End Time 9pm, to make sure you have cleared all opening hours;
  - To change 'Ending Date and Time', click on the drop down window, change year in the calendar by clicking on year, then click on right hand side arrow until 2015 for example, then click on the highlighted month, then click on highlighted day on the calendar to select that day in 2015;
- Select days of the week when the Clinic will be open.

**Remember, to change the existing Roster you need to clear up opening hours first to avoid mistakes:**

- Under General, click on 'Close opening hours for the roster'.
- Click on the 'Update Roster' button in the lower right hand corner of the screen, confirm changes.
- Change 'Start Time' and 'End Time' when the clinic will be open, then click on 'Create opening hours for the roster' under *General*, click on the 'Update Roster' button and confirm changes.

## 2. To change hours for a Practitioner

- Select 'Personnel' view, click 'Bulk Changes' tab, select the Clinic where the Practitioner will be working;
- Select the Practitioner;

The screenshot shows the 'Personnel' view for 'Gamma Clinic'. The 'Date Range and Time' window is open, displaying a table of staff members:

StaffID	LastName	FirstName	JoinDate	IsActive
CAHA1	CALLAN	he	29/07/2008	True
CAHA2	Harrington	Carla	14/12/2009	True
CEO	CEMS	Doug	1/01/2000	True
CHT11	CHEAL	Graham	17/06/2008	True
DAMA1	May	Darla	14/12/2009	True
DOHA1	Hay	Donna	14/12/2009	True
HAGR1	Green	Harry	14/12/2009	True

Below the table, there are checkboxes for days of the week:  Monday,  Tuesday,  Wednesday,  Thursday,  Friday,  Saturday,  Sunday.

The 'Current Roster from the Start Time for 1 month' section shows a table with columns for Start and End times:

Start	End
Thu, 25-Jul-2013 07:00	20:00
Fri, 26-Jul-2013 07:00	20:00
Sat, 27-Jul-2013 07:00	20:00
Sun, 28-Jul-2013 07:00	20:00

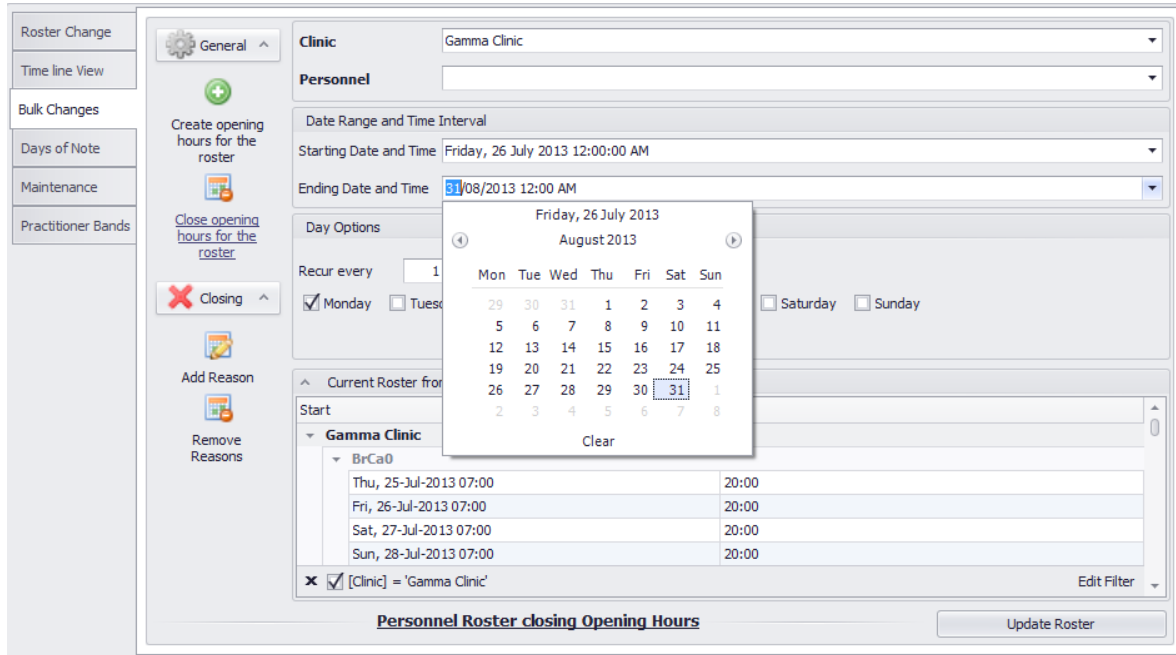
The 'Update Roster' button is visible at the bottom right.

- To change the starting time, simply highlight the time in the 'Starting Date and Time' window and type in the time you need;

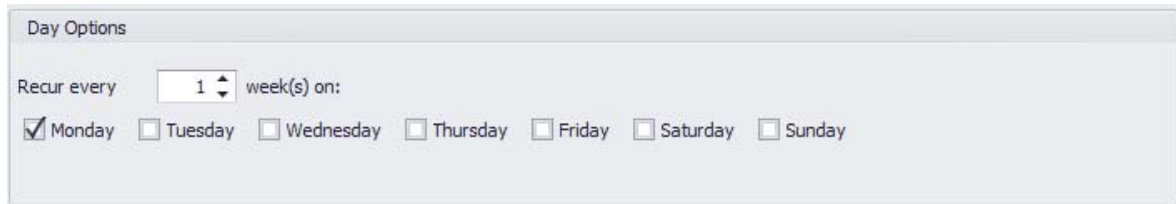
Date Range and Time Interval	
Starting Date and Time	Friday, 26 July 2013 12:00:00 AM
Ending Date and Time	Monday, 26 August 2013 12:00:00 AM



- To change 'Ending Date and Time', click on the drop down window, change year in the calendar by clicking on year, then on right hand side arrow until 2015 as an example, then click on the highlighted month, then click on highlighted day on the calendar to select that day in 2015.

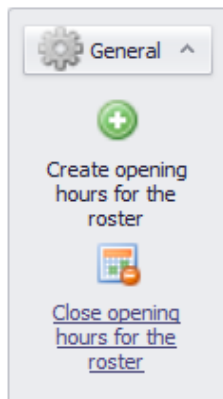


- To change the ending time, if the practitioner is working all day with a break in the middle, it's easier to enter the time when he/she is finished for the day. You can add a break at a later stage;
- Select the days of the week that the practitioner will be working;



**Important: when changing an existing Roster, you need to clear up the existing Roster first, by performing following operation:**

- Under *General* click on 'Close opening hours for the roster';

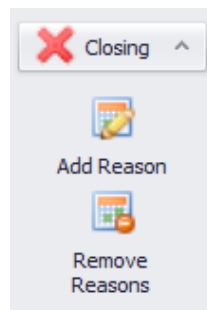


- Click on the 'Update Roster' button in the lower right hand corner of the screen and confirm changes.
- Change 'Start Time' and 'End Time' when the practitioner will be open, then click on 'Create opening hours for the roster' under *General*, click on the 'Update Roster' button and confirm changes.

### 3. To create a break for a Practitioner in the middle of the day:

- Select 'Personnel' view, select the clinic and select the practitioner. Change the start time for the time when the practitioner will finish the morning shift, then change the end time for time when they start again in the afternoon.

- Check the day of the week.
- Click on 'Add Reason' under Closing.



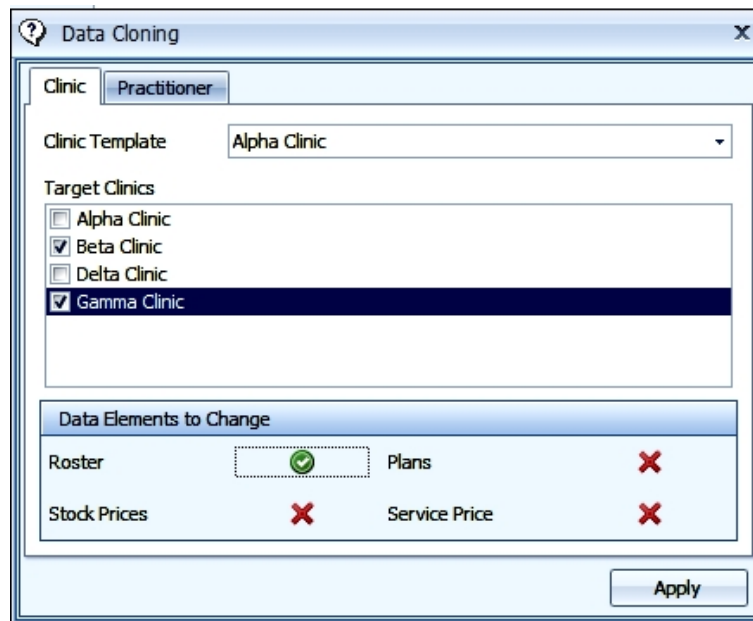
- Type 'Break' as an example in the Reason window; click on the 'Update Roster' button and confirm changes.

- Use similar steps to change the 'Services' Roster.

## 10.8 Data Cloning

Use the *Data Cloning* feature in the *Tool* menu to avoid mistakes when setting up multiple clinics – transfer a roster for a clinic and/or practitioners in a click.

- Create a Roster for one of the clinics then open "Data Cloning" from the Tools menu;
- Select the 'Clinic' tab then select the clinic you've created a roster for in 'Clinic Template';
- Select other clinics in the 'Target' area, then select Roster in the 'Data Element to Change' area and 'Apply';



- Create a Roster for one of the practitioners and use the 'Practitioner' tab in the *Data Cloning* Tool to apply the Roster to other practitioners.



### 10.9 Virtual Roster

This function is available from the *Tools* menu. It is very useful for clinics with a large number of practitioners divided into teams by shift hours e.g. in University outpatient clinics.

- First create the shift pattern:

Virtual Roster

Select an Existing Virtual Roster

Day Of Week	Start Time	End Time
*	Click here to add a new row	
No Entries		

Roster 0 of 0

Save Virtual Roster

Select Practitioners to Roster

Practitioner	User ID	Mark
▼ Acupuncture		
	DOHA1	✘
▼ Chiropractor		
	CEO	✘
	RiKe1	✘
▼ Exercise Physiologist		
	LoLu0	✘
	VaHa1	✘
▶ Massage Therapist		
▶ Naturopath		

Select a Clinic: Gamma Clinic

Start Date: End Date:

Apply

- Select “Day of Week”, select the shift “Start Time”, select the shift “End Time”, press enter on your keyboard; select next day of the week and shift times;
- Continue until set up for the first team is done;
- Click on ‘Save Virtual Roster’ and type a name for the roster, e.g. Blue Team, then ‘OK’.

#### To apply a Virtual Roster to the practitioners:

- Select the existing Virtual Roster, select practitioners from that shift pattern, select clinic, Start Date and End Date and click ‘Apply’.

Select an Existing Virtual Roster: Blue Team

Day Of Week	Start Time	End Time
* Click here to add a new row		
Monday	8:00 AM	11:00 AM
Tuesday	11:00 AM	5:00 PM
Wednesday	3:00 PM	6:00 PM
Thursday	8:00 AM	12:00 PM

Roster 1 of 4

Save Virtual Roster

Select Practitioners to Roster

Practitioner	User ID	Mark
Acupuncture		
	DOHA1	✓
Chiropractor		
	CEO	✓
	RKe1	✗
Exercise Physiologist		
	LoLu0	✗
	VaHa1	✗
Massage Therapist		
Naturopath		

Select a Clinic: Gamma Clinic

Start Date: End Date:

Apply

If a roster for practitioner hours existed before this operation, all hours within the selected period will be deleted and replaced with the new shift pattern.

Next Part is Part 4 – Advanced Features.