

Visual Outcomes Advanced Features Part - 4

Project No. 214548
Job Aid

Job Aid

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Business area: Planning and Projects

Training Manual Structure;

This manual is Part 4 of 6 parts. Version control, sign off and distribution are contained in part 1 only.

| Manual No. | Training Manual | Audience |
|-------------------|-----------------------------------|-----------------------------------|
| Part 1 | Front Desk Operations | VO End Users |
| Part 2 | Front Desk Operations | 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 |

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Part 4 will focus on Visual Outcomes' Advanced Features, Tools, Help and Settings.

1. Invoicing - Change, Cancel and Refund

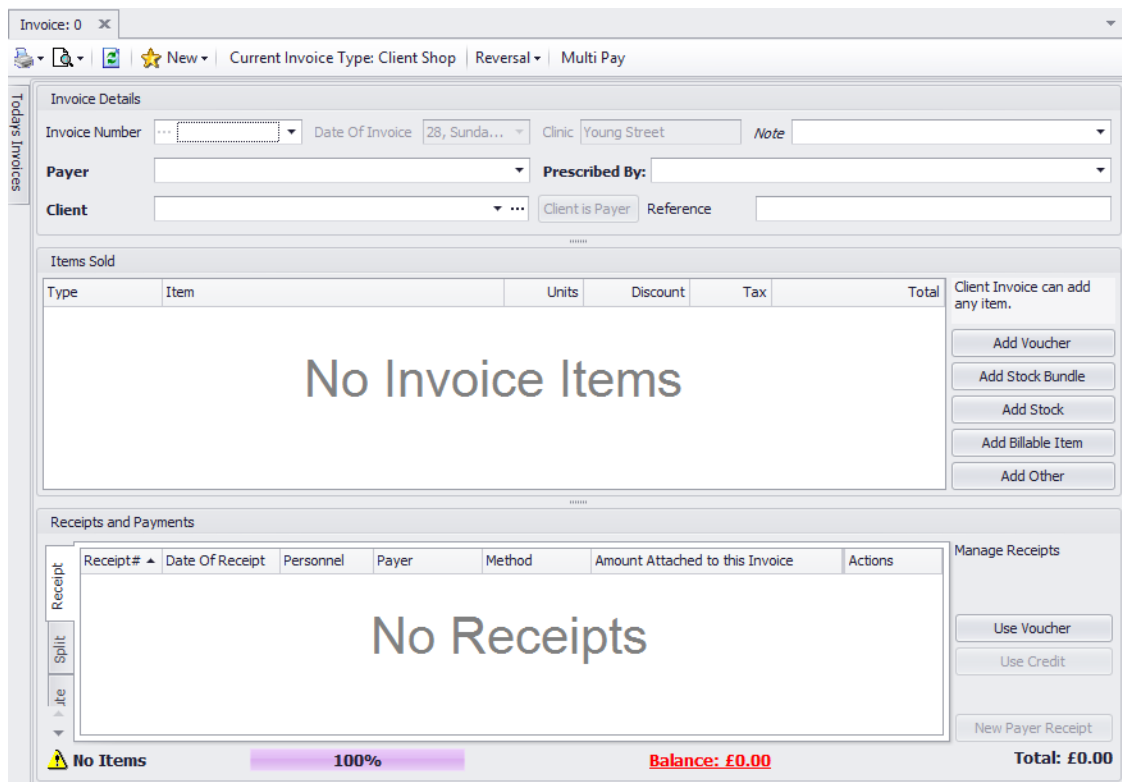
Invoices are generated as defined by the *Invoice Manager*. In many instances the *Invoice Manager* will automatically generate an invoice from the appointment itself – either through *Fast Pay* (accessed by right-clicking on an appointment after the client is marked as 'Arrived') or through auto-creation of an invoice after the client is marked as 'Started':

- Right-click on the appointment to either 'View Invoice' or 'Create and View Invoice'.

For a client on a pre-paid plan you will not see the Invoice Manager in operation as payment is automated from the pre-paid plan credit. The receipted invoice is produced automatically once the service has been 'Started'.

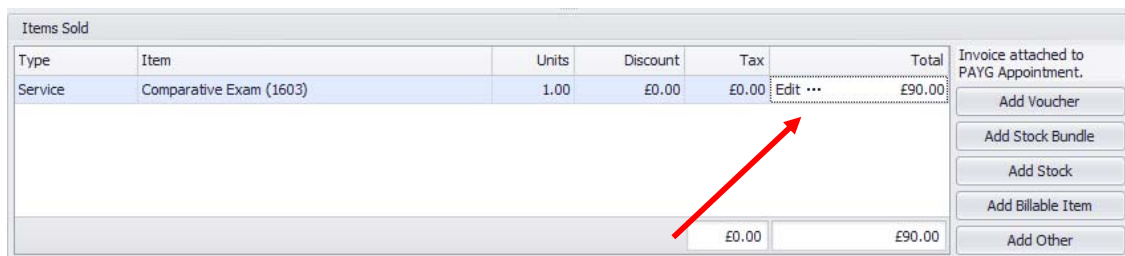
To manually create an invoice:

- Select the Invoice Manager from the Front Desk tab in the Navigator;



Invoices and Receipts can be changed (with a full audit trail available to management for review) by any person who has rights to view the *Invoice Manager*.

You can change an Invoice through the *Invoice Manager* by accessing the 'Edit' window:



- Change the number of service units, apply tax, apply discount, then 'Save' or 'Save & Close' to close the dialog box.

It's also possible to change the invoice date and perform manual rounding if required. Both selections have to be allowed via Visual Outcomes Settings if principals of the practice decide to.

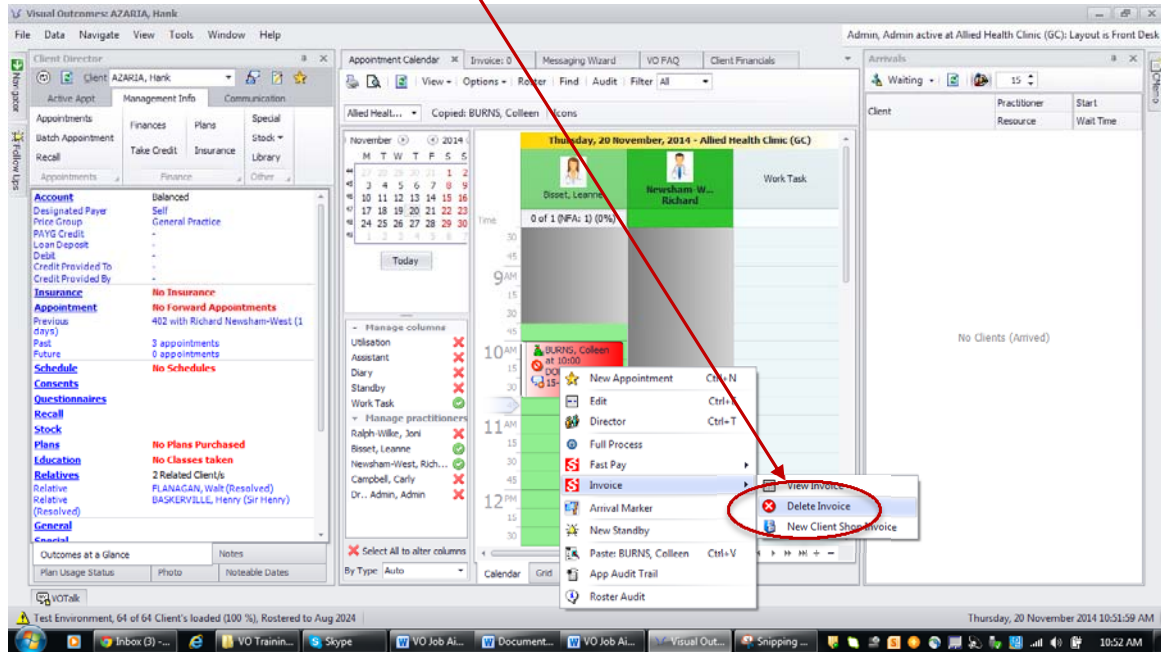
The invoice total is the sum of each line item total.

A second layer of security is built in to the system to ensure that:

- receipts cannot be changed once the banking process has allocated them and been signed off; and
- invoices cannot be changed once they have been 'locked' through the Invoice Protector; by any person other than the CEO or someone to whom the CEO has given rights.

1.1 Cancel Invoice

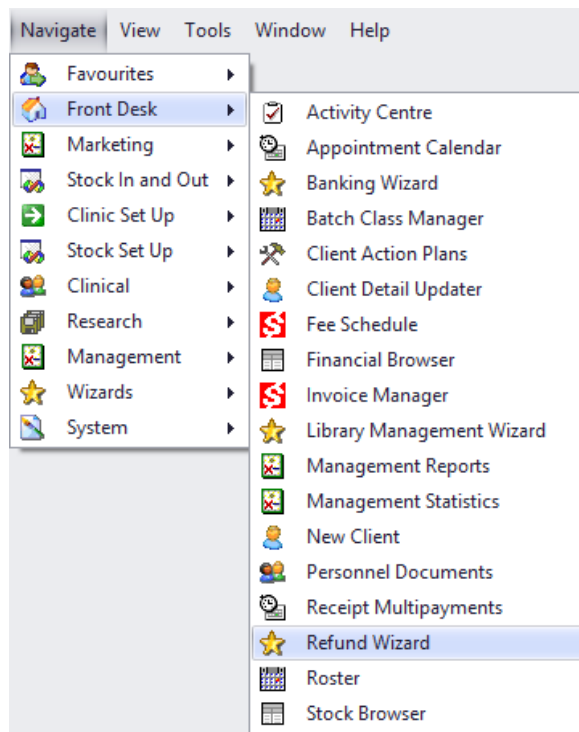
- select client from calendar or search for client through client director
- right click on client
- select invoice
- delete invoice



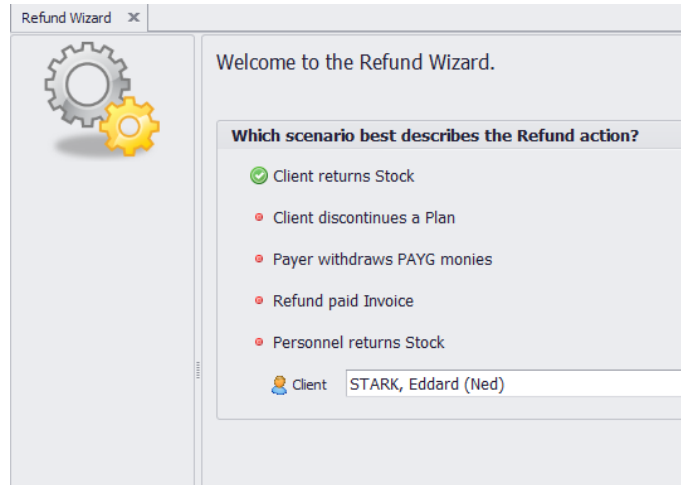
1.2 Refund Wizard

All refunds are processed through the *Refund Wizard*:

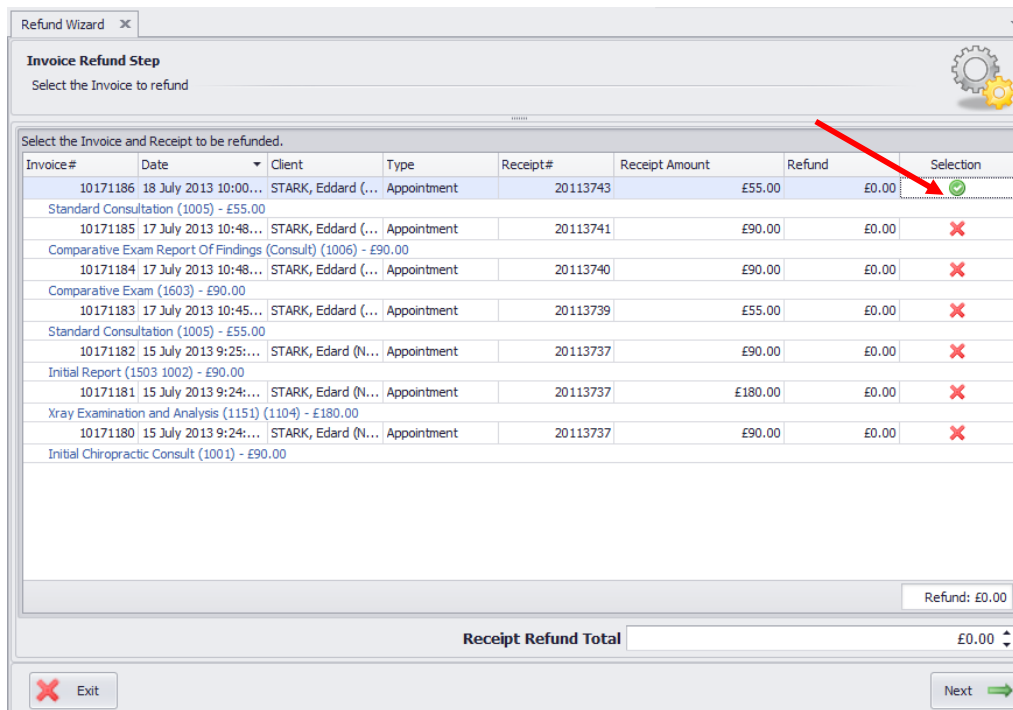
- Select the 'Refund Wizard' from the *Front Desk* tab in the *Navigator*;



- Select the refund procedure to be applied and the Payer or Personnel from the dropdown list. Click 'Next';



- Identify the receipt to be refunded by selecting the green tick.



- Click in the **Refund** column and enter the refund amount – this amount appears in the **Receipt Refund Total** at the bottom of the window
- Click 'Next';
- Here you confirm the details:
- correct receipt;
- Refund Method – note that some methods involve funds going out which affects banking while other methods involve creation of PAYG credit to be otherwise consumed or later paid out;
- Select a **Bad Debt** category if required from the drop down menu;

➤ click 'Next' then 'Preview' and 'Print Credit Note'.

Receipt

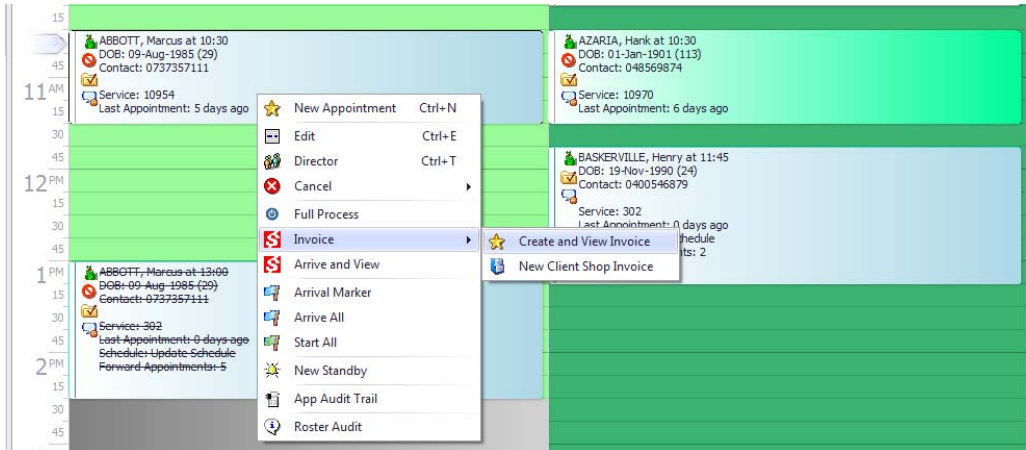
Date of Receipt Tuesday, 21 October 2008 09:49

| Receipt # | Date | Payer | Details | Amount |
|-----------|--------------------------------------|---------------|--|--------------------------|
| 20029362 | Tuesday, 21 October 2008 09:49 | TONNIGES, Kim | TONNIGES, Kim: Plan Refunded Plan Z 25/07/2008 | -\$1310.00 |
| | | | Total | <u>-\$1310.00</u> |

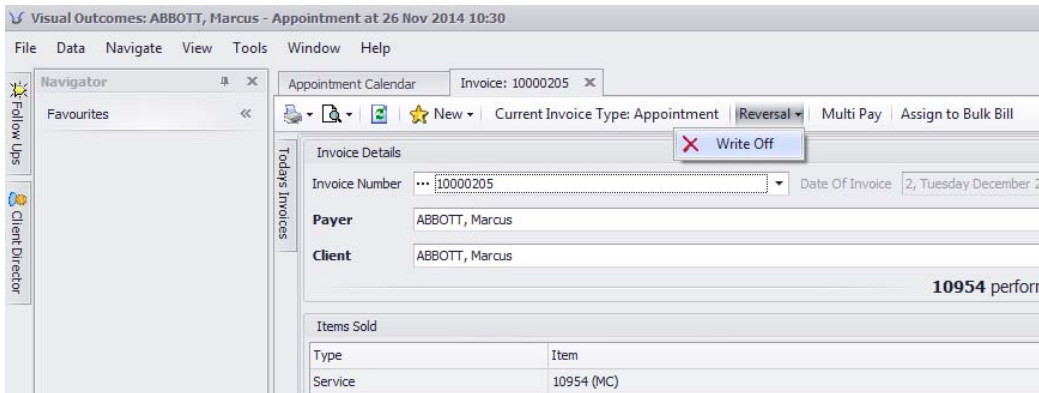
1.3 Reverse and Write-Off Invoice

You may reverse and write-off a bad debt within the system after obtaining permission from the Finance Department.

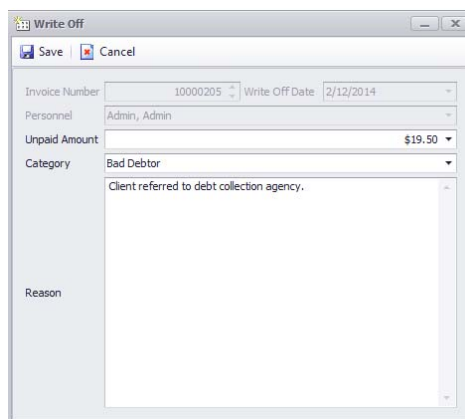
- Go to the client’s appointment in the appointment calendar
- Right-click on the appointment and select View Invoice



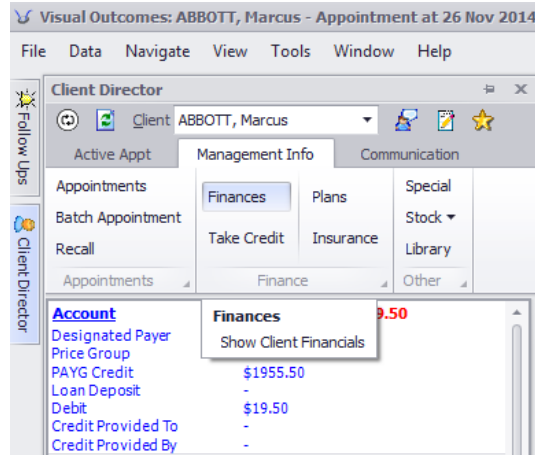
- In the Invoice Wizard, go to the top of the window, left-click on the Reversal menu and select Write-Off



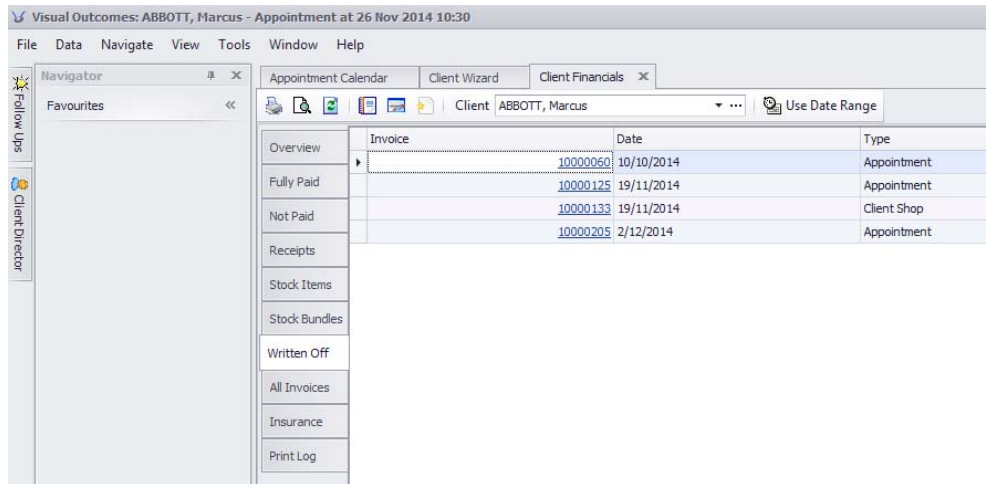
- In the Write-Off window, enter the amount that you wish to write-off (may be part or all of the Invoice amount), select the category of write-off and enter a brief description as to why this amount is being written off



- Click Save on the Write Off window and the amount entered will now be written off. To view what Invoices have been written off for a client, go to the Client Director, select the name of your client from the list and then go to Management Info > Finances.



- In the Finances window, click on the Written Off tab and you can see a list of all of the Invoices that have been partially or entirely written off. You may also click on the Invoice number of any of these invoices to view that particular invoice.

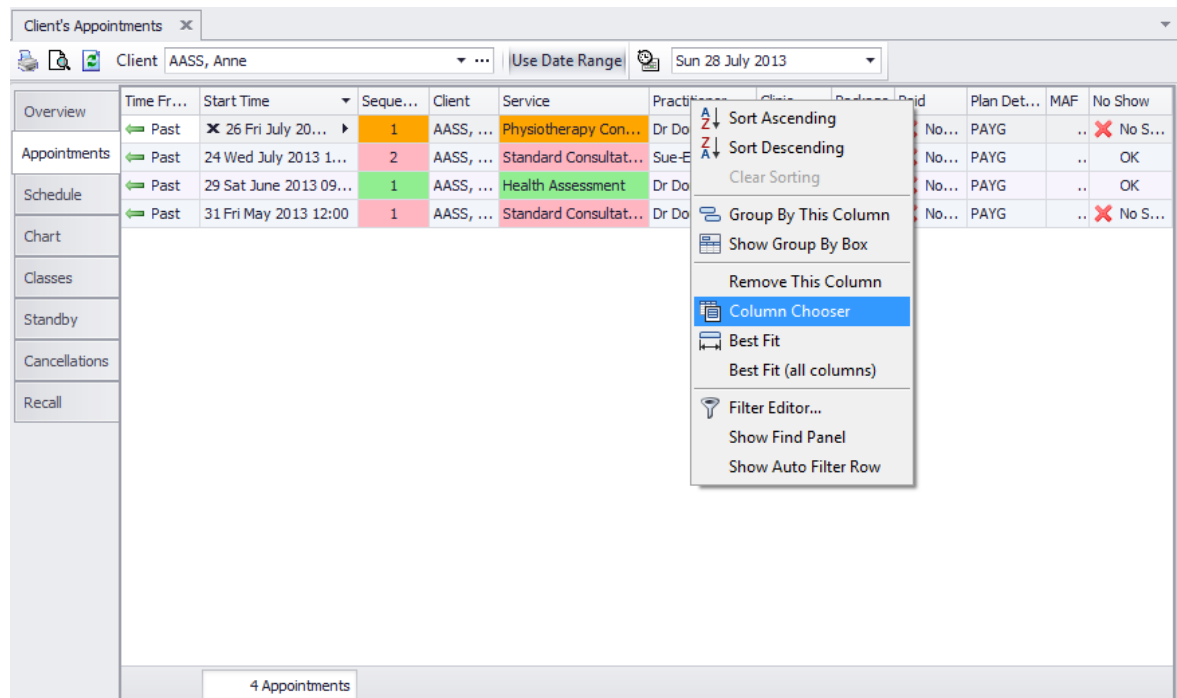


2. Printing

Visual Outcomes can present the Appointments and Client Finances on the screen in a form suitable to print or to export to other communication formats appropriate for emailing or storing for further analysis. This is a 'grid' form which has a great deal of flexibility.

To format the *Appointments* page for printing:

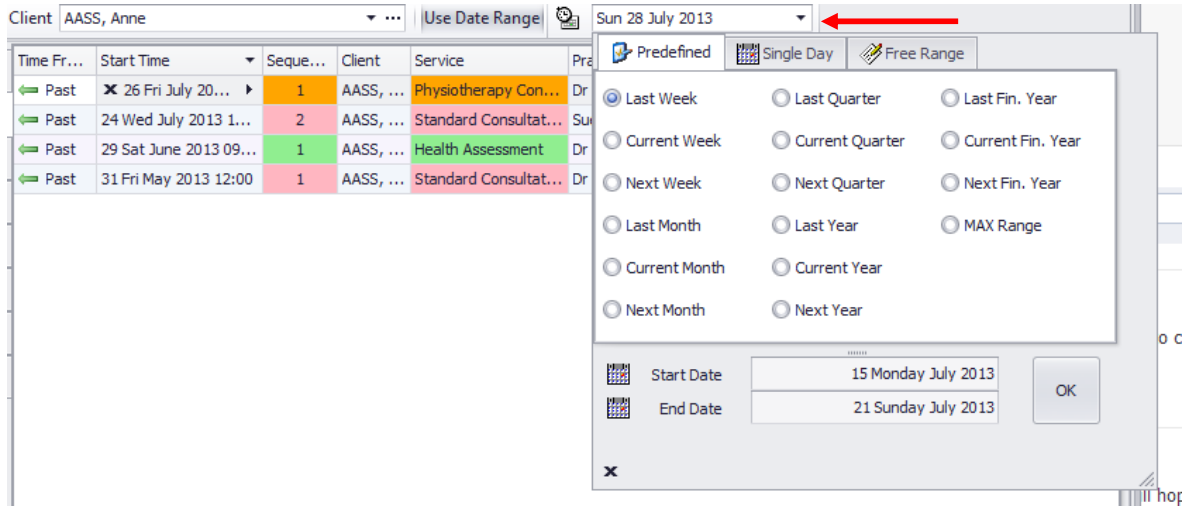
- Select the nominated client in the Client Director, then click on the 'Appointment' link to display all appointments;
- Filter to show the appointments required – past or future by filtering on the Time Frame column.
- Right-click on any column header of the grid;



- Select 'Column Chooser';
- Click and drag on the header of any column not to be displayed and place the header into the Customization box;
- Right-click and select 'Best Fit' or 'Best Fit (all columns)' once you have reduced the information to form the output;
- Use 'Print Preview' and 'Print' or use 'Export';
- Open the 'Column Chooser' again and return relevant items by click and drag to the Appointments page;
- Use 'Print Preview' and 'Print' or use 'Export';

You can right-click to 'Show/Hide Find Panel' and 'Show/Hide Auto Filter Row'

It is also possible to print a client's records within a selected date range and change the page format to be more suitable to present to the client:

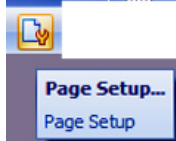


To change the page format:

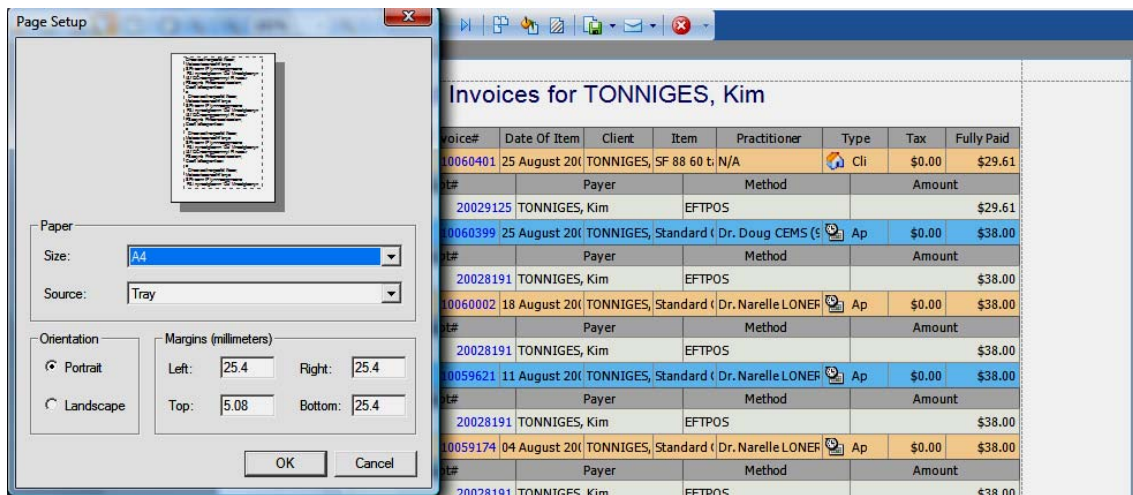
- Select 'Print Preview' from the tool bar;



- Select 'Page Setup';



- Make changes and 'Print'.



Similar principles apply to any of Visual Outcomes' printable tables and statistics.

3. Reports

3.1 The End of Shift Report

The *End of Shift Report* is intended as a working tool to ensure that any anomalies that arise during the shift are attended to and that all follow up on client issues are under control.

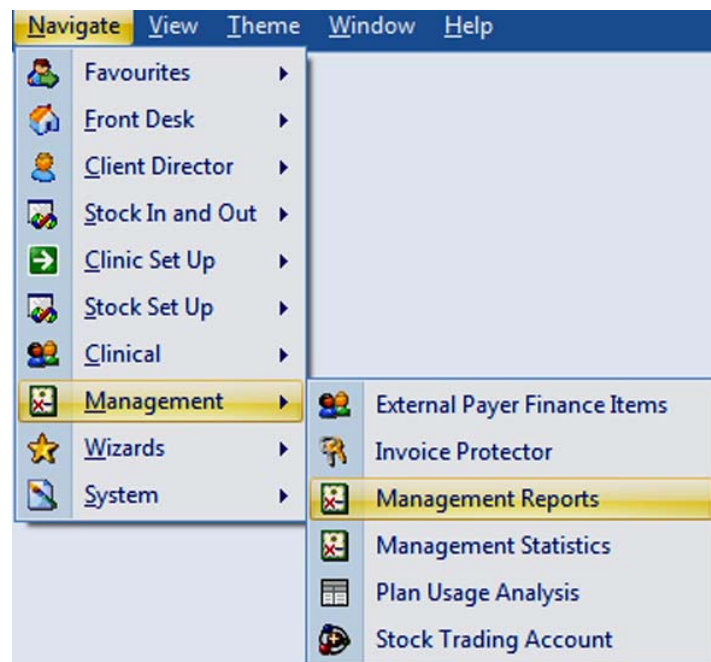
3.2 The End of Day Report

If you are closing the last shift for the day, the *End of Day Report* is sent to the Practice Manager or CEO before closing up. The *End of Day Report* is explained under 'Working for Management'. To send the *End of Day Report*:

- Go to the 'File' menu;
- Select 'e-mail reports';
- Select 'End of Day Report';
- Select 'Email'.

Every Front Desk staff member has their own *End of Shift Report*. The *End of Day Report* is only visible to the CEO and/or Practice Manager.

Access the *End of Shift Report* and *End of Day Report* by selecting 'Management Reports' under the *Front Desk* tab in the *Navigator*.



The report is a Clinic-wide summary of the day's events and highlights any anomalies to be followed up by management. It accumulates some of the analyses appearing individually for CAs in their respective *End of Shift Reports* and goes further to report certain practice outcomes.

Once you have selected the 'End of Day Report':

- The report date will default to 'today'. Use the 'Date Range' tool to select any other day;
- Select whether you wish to report on 'All Clinics' or selected Clinics;
- Select whether you wish to include 'All Personnel' in the report;
- Select 'Run Report';
- When the report has pre-viewed, select 'Full Preview' to see it more clearly. This view also exposes the 'Print' toolbar options;
- Select 'Page Setup' options – landscape may provide a neater output;
- 'Print'; or you can read the report on-screen and save to a server or email.

3.3 The End of Month Report

This report is comprehensive and covers financial outcomes as well as performance reporting at both the Clinic level and at the level of individual Practitioners.

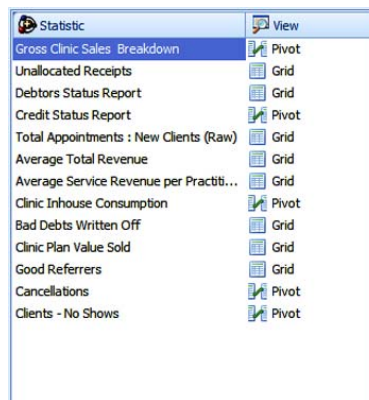
Access the End of Month Report at any time:

- Select 'Management Reports' under the *Management* tab in the *Navigator*.

Once you have selected the *End of Month Report*:

- Select the 'Date Range' – you will usually select 'pre-determined' and 'last month' as the shortcut method, but you can select any Date Range you like using the 'free range' option;
- Select whether you wish to report on 'All Clinics' or selected Clinics;
- Select whether you wish to include 'All Personnel' in the report;
- Select 'Run Report';
- When the report has previewed, select 'Full Preview' to see it more clearly. This view also exposes the 'Print' toolbar options;
- Select 'Page Setup' options – landscape will provide neater output;
- 'Print'; or

You can read the report on-screen and save to a server or email. Email addressing for this action here and for all reports (refer "File menu – Email reports") is set in the configuration 'Settings' under the *Help* menu.

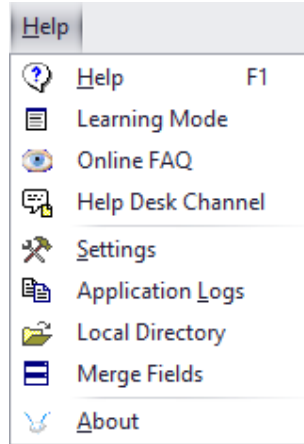


You can select a report to view, then filter clinics and date range, all from the Report Window.

4. Accessing Help through your application

4.1 F1 Help

Access to F1 Help is through the Help menu on the Main Menu bar.

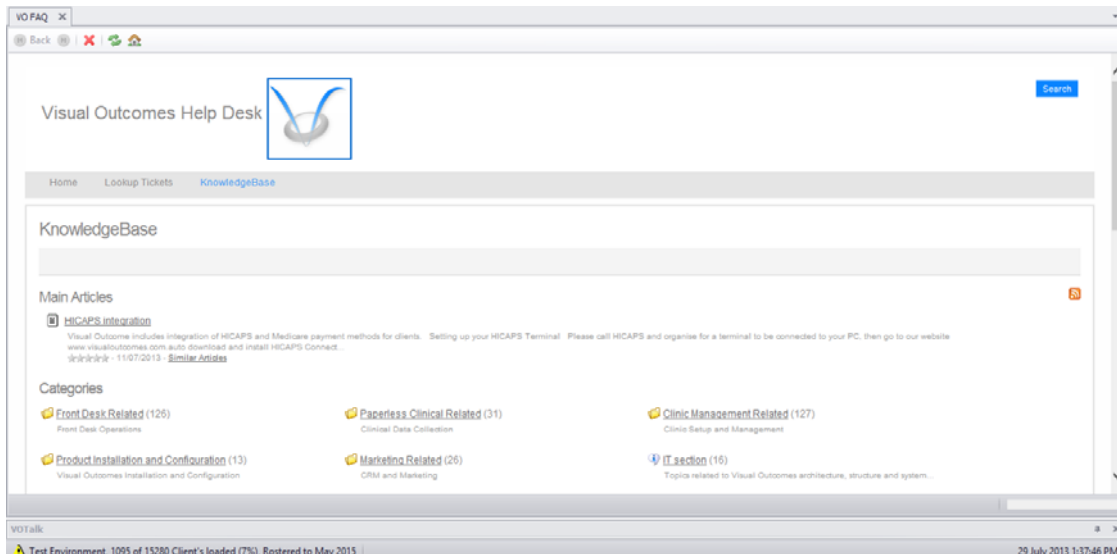


F1 Help provides links to relevant topics, index search and a full list of contents. Please use the F1 Help function when you are exploring Visual Outcomes or learning its new features.

**Note: to access F1 Help you need to have the “OnlineHelp” setting set to:
www.visualoutcomes.com/help.web/**

4.2 FAQs

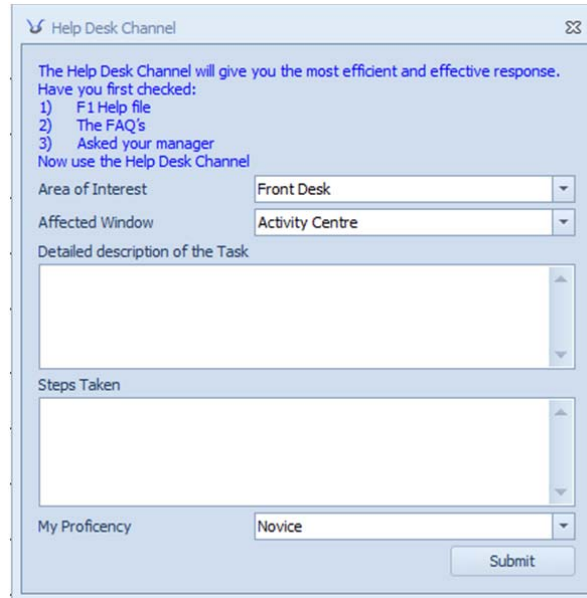
You also have direct access to Visual Outcomes FAQ online from the Front Desk default layout or by going to Help > Online FAQ:



**Note: to access Online FAQs you need to have the “FAQ Address” setting set to:
<http://www.visualoutcomes.com/HelpDesk/kb>**

4.3 Help Desk Channel

You can request assistance via the Help Desk Channel, found in the Help menu:



The screenshot shows a web form titled "Help Desk Channel". At the top, it says "The Help Desk Channel will give you the most efficient and effective response." Below this, it asks "Have you first checked:" and lists three items: "1) F1 Help file", "2) The FAQ's", and "3) Asked your manager". It then says "Now use the Help Desk Channel". The form has several fields: "Area of Interest" with a dropdown menu showing "Front Desk", "Affected Window" with a dropdown menu showing "Activity Centre", "Detailed description of the Task" with a large text area, "Steps Taken" with another large text area, and "My Proficiency" with a dropdown menu showing "Novice". A "Submit" button is located at the bottom right of the form.

Note: to automatically send emails to the VO Help Desk from the Help Desk Channel, you need to have the "SupportEmail" setting set to: helpdesk@visualoutcomes.com

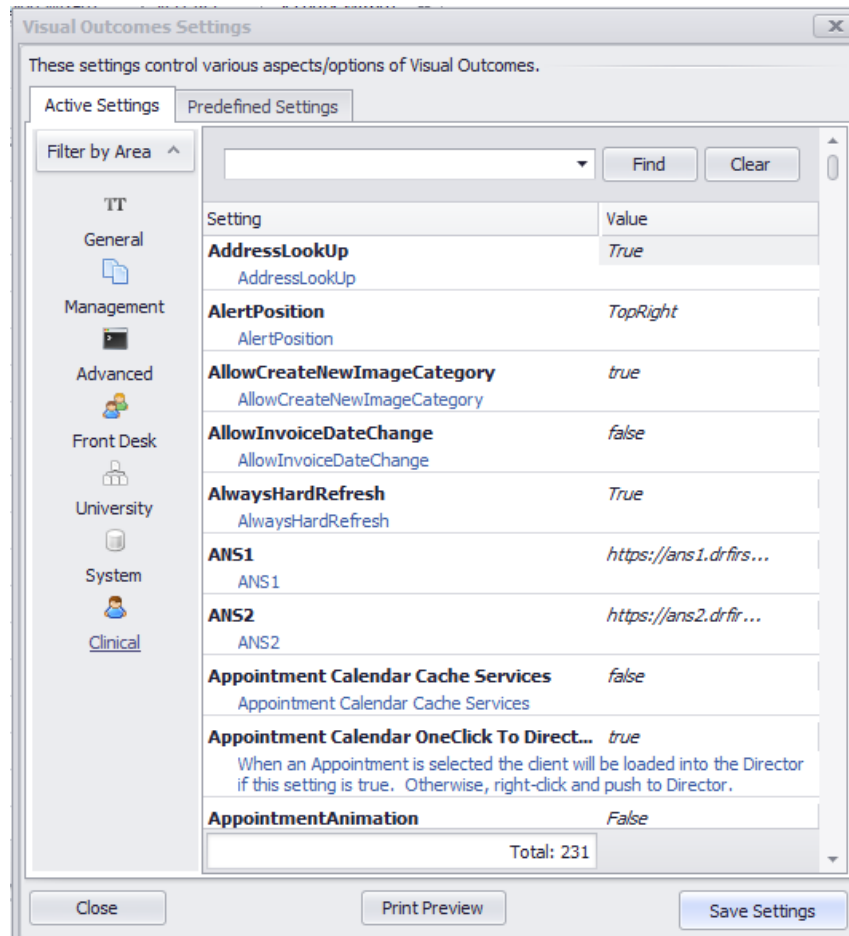
4.4 Visual Outcomes Help Desk online

You can also log on to our online Visual Outcomes Help Desk and post a ticket for support directly. Go to <http://www.visualoutcomes.com/HelpDesk>

5. Settings

5.1 Active Settings

Settings are “read only” for all staff members except the CEO, but everyone should know where to find them and how to read them in case of emergency or while communicating with Visual Outcomes’ support team.



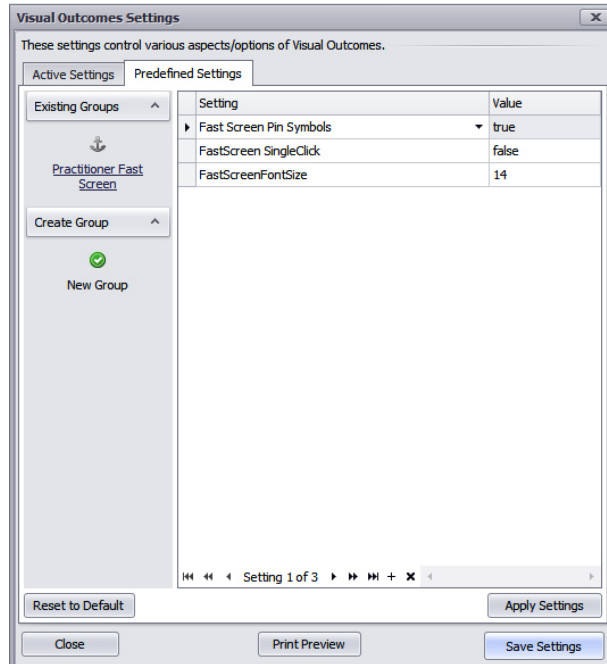
For support, it is important for the VO Support team to know the Setting category, Setting and Value and for the user to know how to locate this information.

By default, all settings in the window above are in alphabetical order.

Note: For a complete list of Settings, please refer to “Appendix 1: Visual Outcomes Settings” in our online F1 Help.

5.2 Predefined Settings

Predefined Settings allows CEO security level to create custom settings groups to accommodate the need for different functional roles in a practice or different Visual Outcomes features to be used on particular local PCs.



Examples of when Predefined Settings might be useful:

- Multiple locations
- To include DefaultClinic, TillName settings
- Specific PC/VO functionality, e.g. Front Desk PC with HICAPS terminal attached.

To create a new Group:

- Click on the New Group button on the lhs of the screen
- Type the group name, then OK
- Click on the Group on the left of the screen
- To add a setting click on '+' icon on the bottom toolbar of the window
- Start typing a setting name – it will appear in the drop down list; then set value. Please refer to Appendix 1 for a list of settings and Visual Outcomes' recommendations or see relevant sections of this guide.
- Repeat the process to add the next setting. There is no need to save Settings, Visual Outcomes automatically saves as you type.
- To remove a setting from a group use the 'X' icon on the bottom toolbar of the window
- Once group is created it will be available on each PC of clinic network

Any user can then apply the settings needed on any PC they are working on.

To apply a selected Group:

- Click on the group name on the left of the window
- Once settings are visible click on the 'Apply Settings' button
- Click on the 'Close' button to initiate the change
- Restart Visual Outcomes.

You can move on to Part 5.