

ezScriptWriter User Manual

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ezScriptWriter

Prescription Writing Software

by Iccomplish, Inc

ezScriptWriter User Manual

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Printed: March 2011



Table of Contents

4

| Part I | How to Use this Manual | 8 |
|----------|---|----|
| Part II | Overview of ezScriptWriter | 12 |
| 1 | Evaluating the Software (Free Trial Period) | 13 |
| | | |
| 2 | Register/Activate software | |
| 3 | How to Purchase | 15 |
| 4 | Hardware Requirements | 15 |
| Part III | How Do I? | 18 |
| 1 | Installation and Setup | |
| | Using the Setup Wizard | |
| | Password Selection | |
| 2 | Getting Started | |
| _ | | |
| | Administrator Login | |
| | l ost/forgotten passwords | 20 |
| | EAQ (frequently asked questions) | |
| | User Manual (pdf) | |
| | Sample Patient | |
| 3 | Navigating the Program | |
| | Main Menu | |
| | QuickFind Tool | |
| | Patient Charts | |
| | Create a New Patient Chart | |
| | Open an Existing Patient Chart | |
| | Patient List | |
| | Patient Demographics Screen | |
| | Subscriber Info | |
| | Open/Pulled Charts | |
| | Chart Options | |
| | Modify Name | |
| | Sticky Note | |
| | Encounter List | |
| | Create Encounter | |
| | Create Rx | |
| | Create a Report | |
| | Using the Report Writer | |
| | Using Images | |
| | Using Tables | |
| | Create a Note | |
| | Attach/Scan a Document | |
| - | Rx Logbook | |
| 4 | Patient Reminders | |
| | Create/Send a New Reminder | |
| | Receiving a Reminder | |

| Contents | |
|----------|--|
| | |

5

| | Managing Reminders | |
|---------|----------------------------------|-----|
| | User Groups | |
| 5 | Special Functions | |
| | Database Maintenance | |
| | Backup Database | |
| | Compact Database | |
| | Software Mantenance | |
| | Report Bugs | |
| | Check for Updates | |
| | Data Management | |
| | Query/Statistics | |
| | Encrypt/Compress Reports | |
| | Miscellaneous Functions | |
| | Report Designer | |
| | Available Fields | |
| | Rolodex Utility | |
| 6 | Recall Wizard | 102 |
| | Creating a Recall List | |
| | Create Labels | |
| | Create Form Letters | |
| | Generate Email List | |
| | Using "Mail Chimp" | |
| | Generate Phone List | |
| | Using "Dial My Calls" | |
| | Export Data | |
| | Using "Click2Mail" | |
| 7 | Importing/Exporting Patient Data | 119 |
| | Importing Data | |
| | Exporting Data | |
| 8 | Program Settings | 123 |
| 9 | PreTesting Module | |
| 10 | Software Versions | |
| 11 | Misc Functions | |
| 40 | | |
| 12 | ePrescribe | |
| Part IV | Admin Functions | 141 |
| 1 | Software Account | |
| | Purchase Software | |
| | Register/License Software | |
| | View Licenses | |
| | Change Account Number | |
| 2 | Settings & Options | 146 |
| | Clinic Details Screen | |
| | User Details | |
| | Comprehensive Security Settings | |
| | International Settings | 151 |
| | Locate Database | |
| 3 | Reset Passwords | 153 |
| 4 | Audit Trail | |

| 6 | ezScriptWriter User Manual |
|---|----------------------------|
| • | |

| 5 | System Info | . 155 |
|---------|----------------------------|-------|
| Part V | Troubleshooting Problems | 158 |
| Part VI | Software License Agreement | 166 |



8

1 How to Use this Manual

Navigating this Manual

This User's Guide is provided in both printed and electronic form, searchable with most commonly available document viewing programs. If you cannot locate an index topic you need, please do a text string-search for the relevant word or phrase, or related words.

The screenshots shown throughout this guide have been taken with a relatively small window size. The default display is a window that fills the screen. Click once on the **Minimize** button (upper right-hand corner of window display) to get a smaller working area; click on the **Maximize** button to return to full-screen display.

The screenshots have been taken with the next-to-last version of the software. We have made every effort to match what you will see in ezScriptWriter with what the guide shows, but there may be slight discrepancies.

This guide assumes you have basic familiarity with using a mouse and file manipulation in Microsoft Windows. This manual was written using a tree structure (for example, topics are listed in a

hierarchical branching format). If the tree is fully closed, click the "+" sign in the box icon ⁽¹⁾ to the left of the node icon to open up the first branch, then repeat this process to open up further branches. Alternatively, click the blue underlined hyperlinks on this page to jump to the main sections.

If you want to move down the tree using the keyboard, press the **Tab** key. This will take you to all subtrees that are currently open.

Conventions Used in this Manual

Click refers to clicking a menu item, a button or a clickable icon (tool button). **Press** refers to pressing a keyboard key or key sequence.

Mouse and Keyboard Notation

Mouse Notation

Unless otherwise specified, **click** refers to clicking the left mouse button once. Where there might be ambiguity, the terms **left-click**, **right-click**, and **double-click** (using the left mouse button) will be used.

Drag-and-drop refers to dragging an object with the mouse cursor while keeping the left mouse button depressed, then releasing the left mouse button to "drop" the object.

Keyboard Notation

Keyboard key combinations are shown in boldface, for example, Backspace means "Press the

Backspace key."

The **Control** key is shortened to **Ctrl.** For example, **Ctrl+A** means "Press the **Control** key, and while holding it down, press the **A** key."

The Alt key is an abbreviation for Alternative.

The Shift key is not abbreviated.

Shift+Ctrl+A means "Depress the **Shift** and **Control** keys, and while holding them down together, press the **A** key."

Note: You can choose the **Shift**, **Ctrl** and **Alt** keys from either side of the keyboard, according to convenience.

The Escape key is abbreviated as Esc.

To **select a node** means to click its icon or title in the Tree view on the left side, or move the Tree view cursor up or down using the cursor (arrow) keys, until the desired node is highlighted.

Mouse Conventions

You may perform several actions during your work with this software; the following specific words are used to describe them:

- Point to move the mouse pointer to an item.
- Click or Left-click point to an item and press the left mouse button.
- **Right-Click** point to an item and press the right mouse button.
- Double-Click point to an item and quickly press the left mouse button twice.
- **Drag** point to an item and press and hold down the left mouse button while you move the item.
- Select highlight or make an interface element active by either clicking it or dragging over it (other actions are possible, if specified in the documentation). If used in select the check box, it means that the check box should be marked with a tick (as opposed to clear the check box when the check box should be cleared, without a mark).

Keyboard Conventions

Keystroke commands are noted in bold letters. Command key combinations are separated by the dash symbol ("-"). This indicates that the noted keys are to be pressed simultaneously. For example, **Alt-S** signifies that you should hold down the **Alt** key while pressing the **S** key. Bold lower-case letters indicate operating system commands and command lines. For example, you would enter **copy *.*** on the command line exactly as written.

Menu Notation

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Menu selections are shown in boldface italics to distinguish them from commands and the rest of the text. An instruction such as "Click *File / Save*" means "Click the word *File* on the Main menu (located at the top of the window) and when a drop-down menu appears, select *Save* from the list of options.

If the words in the menu appear faint or "<u>greyed-out.</u>" this means that the menu option exists, but is unavailable (disabled) right now.

When there is a specific order of buttons to click, they will be separated by the arrow symbol "-->"; to complete the action follow the sequence exactly as presented.

For an explanation of keyboard shortcuts and menu access keys see Making it all happen.

Other Conventions Used in this Manual

Besides icons noting specific operating systems throughout this manual, the following are used to indicate specific types of information. The applicable information follows each icon in indented paragraph format as shown below:



This icon is used to identify important information and tips.



Specific warning information that may help you avoid a problem.



2 Overview of ezScriptWriter

What is ezScriptWriter?

ezScriptWriter is a powerful, yet easy-to-use software system for creating and printing medication and/or ophthalmic prescriptions. It includes a built-in word processor, report editor, Rx logbook feature, reminders and note documentation tool in one application, which you can use to organize your patient demographics, Rxs and other data.

Program Structure

ezScriptWriter uses familiar images as the cornerstone of the user interface. For example, a patient chart looks similar to what you would see in the paper format. Rx's and notes are presented in lists that can be double clicked to call up the appropriate report. The report editor is similar to standard word processors available in Windows XP.

Certification

Our ezScriptWriter software is very low cost (only \$189 per year per location with unlimited computers/users) and does not include any EHR features (other than ability to create Rx's and scan in paper charts), so we are not pursuing certification. However, because some of our doctors see a significant amount of Medicare patients, we have partially integrated with PracticeFusionEHR.com. That site is a free EHR and has ONC certification. Sponsored in part by Dell Computers, they are the leading free EHR solution. This fits nicely with our own low cost software model. The website is fairly limited in optometric functions (which is where our software comes into play). You simply paste your SOAP note to the site and keep a parallel system online. So it also functions as a "backup" of your SOAP notes that can be accessed anywhere there is internet.

To qualify, you have to be an eligible provider who bills CMS. Next, you need to use a certified EHR system and meet 20 criteria for Meaningful Use. For 2011, you will to attest to CMS that you met the Meaningful Use criteria for 90 consecutive days and your incentives will be paid with your reimbursements.

Practice Fusion's EHR is ONC-ATCB 2011/2012 compliant and is certified as an EHR Module in accordance with the applicable certification criteria adopted by the Secretary of Health and Human Services (HHS).

- 1. Record patient demographics (including gender, race and ethnicity, date of birth, preferred language) at least 50% of the time
- 2. Record vital signs (height, weight, blood pressure, body mass index, and growth charts for children) at least 50% of the time
- 3. Maintain up-to-date problem lists at least 80% of the time
- 4. Maintain active medication lists at least 80% of the time
- 5. Maintain active medication allergy lists at least 80% of the time
- 6. Record smoking status for patients older than 13 years of age at least 50% of the time
- 7. Provide patients with a clinical summary for each office visit within 3 business days, at least 50% of the time
- 8. On request, provide patients with an electronic copy of their health information (including test results, problem lists, meds lists, allergies) within 3 business days,

at least 50% of the time

- 9. Generate electronic prescriptions at least 40% of the time
- Use Computerized Physician Order Entry (CPOE) for medication orders at least 30% of the time. (note: CPOE for lab ordering, imaging ordering, and referrals are not addressed here – only medications)
- 11. Implement drug-drug and drug-allergy interaction checks at least 40% of the time
- 12. Be able to exchange key clinical information among providers by performing at least one test of the EMR's ability to do this.
- 13. Implement one clinical decision support rule, and ability to track compliance with the rule (this is reduced from the previous 5 rules to the final 1 rule)
- Implement systems that protect privacy and security of patient data in the EMR, by conducting or reviewing a security risk analysis, and taking corrective step if needed
- Report clinical quality measures to CMS or states for 2011 provide aggregate numerator and denominator through attestation; for 2012, electronically submit measures (this refers to PQRI measures)

Rx Wizards

In order to quickly build a Rx, a wizard is available to walk you through the process. Whether you are creating a medication Rx, a spectacle Rx or a contact lens Rx, the wizard gives you the tools to easily enter your prescription data. One of ezScriptWriter's great strengths is that it allows you to create Rx's based on prior data, simply by double clicking on a past Rx in the Logbook

It should be mentioned that ezScriptWriter does not oblige you to use the Rx Wizard at all. For example, for custom Rx's you can simple open a blank report and manually type your data.

Reports

Although functioning mostly to generate Rx's, ezScriptWriter can also help you save time by generating letters, reports, and patient handouts. Many pre-existing sample reports are included or you can build your own!

Compatibility

Since ezScriptWriter can export data in both text and PDF formats, you can send your Rx's and letters in e-mail or simply create backup copies that can be opened on any computer.

2.1 Evaluating the Software (Free Trial Period)

ezScriptWriter is free to try for up to the first 30 days, during which time the program is fully functional. Beyond this limit, you need to <u>register</u> the software. You should keep the following in mind when evaluating ezScriptWriter:

- The installation of a fresh version of ezScriptWriter over a previously installed evaluation version does not prolong the original 30 day evaluation period.
- Each location (clinic) that uses ezScriptWriter will have its own uniquely assigned serial ID number and account number. Your account number is your practice telephone number. When you register the software you will be asked to provide your practice telephone

number; please provide a valid and accurate number. If your telephone number should change in the future, you will need to re-register your software. If you have two (or more) locations, each will require a separate registration number.

2.2 Register/Activate software

To register ezScriptWriter, you simply need to download the **activation** codes automatically once the software is properly licensed.

| Registration Uptions I would like to evaluate the software be | efore pur | chasing | 0 |
|---|---------------------|---------------------------|------|
| Five (5) day trial period, totally a Thirty (30) day trial, requires filling | indnymo ng out a | us short survey form * | spam |
| Already purchased a software license? | C No | • Yes | |
| Activate Now via Internet Import Lic | ense File | www.ezchartwriter.com | |

ezScriptWriter will run unregistered for up to 30 days. When unregistered, the software runs without limitations of any kind; what you see is what you will get.

When you run an unregistered version of ezScriptWriter in excess of the allowed 30 days, a window will appear displaying the expiration status of your trial and giving you the opportunity to do one of the following:

 Purchase your version of ezScriptWriter (with the Purchase Software button or directly via the ezScriptWriter website);



- Register your version of ezScriptWriter by using the online activation (or CD-ROM) you
 once you have purchased your license(s); or
- **Exit** the unregistered program.

You can also find the Purchase/Register options by logging in as the Adminsitrator and clicking Admin Settings --> Software Account.

Once you register ezScriptWriter, you will notice that the **View Licenses** menu of the Administrator screen displays your serial number and registration status.

The registration Web page, where you can purchase and register your ezScriptWriter software is located at www.ezScriptWriter.com/order.htm

If you have more than one clinic location, each will need to be individually registered since each will have a separate database and account number (which is the practice telephone number).

You DO NOT have to purchase a license for each computer and/or user; we license only the single clinic location.

2.3 How to Purchase

We recommend you use the internal Order Form built into the ezScriptWriter software. You can also find the Purchase/Register options by logging in as the Adminsitrator and clicking Admin Settings --> Software Account.

For detailed information regarding how to buy a software license, visit the website order form at <u>www.ezscriptwriter.com</u>

2.4 Hardware Requirements

We highly recommend that you use a computer system with more than the minimum requirements to improve performance and speed. Also, the choice of network greatly impacts the speed at which you can access the database. Wireless networks should only be used for light-duty workstations.

You can find up-to-date information about system requirements by visiting our website located at www.ezScriptWriter.com

Before you start using ezScriptWriter, you should have a working knowledge of your PC and your operating system. The software is designed to operate under Windows XP/2000/2003. You should know how to use a mouse, keyboard, the standard Windows menus and commands, and how to open, save, and close files. For more information, consult your Microsoft documentation.

To use ezScriptWriter successfully, you need to a printer (preferably a Laser printer, although an inkjet will work). And, of course, you need a computer that is capable of running ezScriptWriter. A network setup is very desirable, as this will allow frontdesk staff to enter the basic patient demographics and to print letters for patients at the front counter.

Recommended Paper

No Security Features: Weyehaeuser 20 lb. pre-perforated copy paper (at 5 1/2")

- Available by the case from Office Depot or a similar office supply store
- Advantage: Low cost
- Disadvantages: Easy to alter; not valid in some states



Security Paper: Secure Laser Rx Paper (various formats)

- Includes security background (word VOID appears when photocopied)
- Erasure protection
- Advantage: Nearly impossible to duplicate/alter
- Disadvantage: Much more expensive than copy paper

NOTE: If you intend to print computer-generated medication Rx's, please check with your state

Pharmacy Board to verify that they will be acceptable in your state or locality. Some states, for example New Jersey, require pre-numbered prescription blanks.

Recommended Printer

KONICA Minolta-QMS PagePro 1350-W Laser Printer



- 21 pages-per-minute
- 1200 dpi, 8M
- Can usually be purchased for under \$200 online or at any computer superstore

Recommended Network Gear

Wireless Pre-N Broadband Router



Click here to visit the Belkin website.

- Allows both wired and wireless connections
- Can usually be purchased for under \$100 online or at any computer superstore

NOTE: ezScriptWriter will operate much slower on a wireless network than over a wired ethernet system.



3 How Do I?

"**How do I?**" help is available on most screens in ezScriptWriter. Many times you will be brought directly to the topic that relates to the screen that you are viewing. You can also jump from topic-to-topic or use the search feature. Other help resources include the PDF manual and the Frequently Asked Questions (FAQs). Access these areas from the Main Login Screen.

How do I ?

Get started using ezScriptWriter? Use the Admin functions? Create a new patient? Open an existing patient? Use the QuickFind tool? Create a Rx? Create a Report? Create a Note? Scan or Attach Documents?

The quickest way to display the help is to press F1. If context-sensitive help is available it will be displayed automatically.

Most of the screens in ezScriptWriter have a Help button that displays relevant information.

Help Select the Help item in the menu bar for additional help options.

3.1 Installation and Setup

Step 1 - Download and Install

After you have downloaded the software from the website (<u>www.ezScriptWriter.com</u>), you must doubleclick on the setup file to begin the installation process. The setup file is called "ezscriptwriter_setup.exe" and is usually located in your My Documents or Downloads folder. Follow the on-screen prompts to complete the installation process.

NOTE: You must install ezScriptWriter on every computer on your network that you wish to connect to the database.

Step 2 - Setup the Software for First-Time Run

On the computer you wish to keep the database (e.g. the "primary computer" or "server"), double-click the ezScriptWriter icon to begin the Setup process. The <u>Setup Wizard</u> will appear.

See the Networking Tutorial for details of how to setup your network. This tutorial can be accessed by clicking the tutorial button on the setup screen:



3.1.1 Using the Setup Wizard

The first time ezScriptWriter is accessed, the **Networking Wizard** displays to guide you through configuring the program according to your custom settings (even if you do not plan to install on a network, you must follow these steps).

- 1. Open ezScriptWriter. The Program Splash Screen displays; click Continue
- 2. Click Start to start the wizard. The Networking Wizard window displays:

| 🎫 Network Wizard 🛛 🛛 🔯 |
|--|
| Welcome to ezScriptWriter! |
| Network Configuration Tool |
| This networking wizard will assist you in setting up your patient database properly. Please answer the following questions to continue the setup: |
| Will you be using ezScriptWriter on a network or on a single computer? |
| O Network O Single Computer |
| NOTE: ezScriptWriter is designed to work on small computer networks (up to 10 computers). More than that will result in performance and speed problems. |
| Network Tutorial 🍂 Vista and Win 7 Users 🎼 🛶 🗶 Cancel |

- 3. Select the First time installation option and select the Edit Admin Settings box. It is recommended that you use the default installation location (usually the Program Files\ezHealthWare folder, unless you are setting up a client computer on a network.
- 4. Click Next. The Registration of Software window displays momentarily, and then the Create New Database Utility window opens:

CLICK HERE TO CONTINUE -->



5. Click Build New Database. The system builds your database and displays a completion message once the database is created.

| | | thWare Ilation Database Creation |
|--|---|--|
| First-time Data | abase Creation Util | ity |
| we will now cri ezChartWriter s several minute are running thi computer on yo 'networking' se making the dat network. | eate an empty data software for the first s. For a network so s wizard on the prin our network is prefe ction of the user m tabase visible to oth | base to begin using the t time. This may take etup, make sure that you mary server (the fastest erred). Please see the anual for help on her computers on your |
| Where do you | want the database I | located? |
| C:\ezHW_Data | ۱. | |
| | 🚳 Build Ne | Reset to default location |

6. Click Next. The Registration of Software window displays:

| 5 | Software Registration Utility |
|---|---|
| | THIS PRODUCT IS LICENSED TO: |
| | Unregistered User TRIAL VERSION DATABASE SERIAL# 69925-644F6-FC489-19D77-BC56C MODULES: ezClaimBiller ezApptScheduler ezRecallManager ezDataExchange |
| vve mak that you purchas | a our software freely available and fully functional for testing in the trial version, so can try out all the features and see if it really works for you. If you have already id a software Registration Code, please enter it below. |
| Prima NOTE PLEAS | The phone number, shown on Reports/Rx's, is locked in after registering the software. DO NOT USE YOUR HOME PHONE OR CELL NUMBER; it is difficult to change after buying. |
| Prima NOTE PLEAS | The phone number, shown on Reports/Rx's, is locked in after registering the software. E DO NOT USE YOUR HOME PHONE OR CELL NUMBER; it is difficult to change after buying. |
| Prima NOTE PLEAS Registr I wo | The phone number serves as your account number. The phone number, shown on Reports/Rx's, is locked in after registering the software. E DO NOT USE YOUR HOME PHONE OR CELL NUMBER; it is difficult to change after buying. Ition Options Jid like to evaluate the software before purchasing |
| Prima NOTE PLEAS Registr I wo | The phone number, shown on Reports/Rx's, is locked in after registering the software. E DO NOT USE YOUR HOME PHONE OR CELL NUMBER; it is difficult to change after buying. Ition Options Juld like to evaluate the software before purchasing Five (5) day trial period, totally anonymous |
| Prima NOTE PLEAS - Registr I wo | The phone number, shown on Reports/Rx's, is locked in after registering the software. E DO NOT USE YOUR HOME PHONE OR CELL NUMBER; it is difficult to change after buying. Ition Options Juld like to evaluate the software before purchasing Five (5) day trial period, totally anonymous Thirty (30) day trial; requires filling out a short survey form * |
| Prima NOTE PLEAS Registr I wo C Alres | The phone number serves as your account number. The phone number, shown on Reports/Rx's, is locked in after registering the software. E DO NOT USE YOUR HOME PHONE OR CELL NUMBER; it is difficult to change after buying. Ition Options Uld like to evaluate the software before purchasing Five (5) day trial period, totally anonymous Thirty (30) day trial; requires filling out a short survey form * dy purchased a software license? (No C Yes |
| Prima NOTE PLEAS - Registr I wo C Alrea | The phone number, shown on Reports/Rx's, is locked in after registering the software. E DO NOT USE YOUR HOME PHONE OR CELL NUMBER; it is difficult to change after buying. Id like to evaluate the software before purchasing Five (5) day trial period, totally anonymous Thirty (30) day trial; requires filling out a short survey form * dy purchased a software license? INO C Yes You can purchase at any time by visiting: www.ezchartwriter.com |

- 7. Once the database is created, you will be guided through the process of registering and setting up the software. If you are evaluating ezScriptWriter, you do not have to provide a software registration key code in the space provided. Simply leave this field blank and you will have an opportunity to use the software with a limited number of patients (30 is the maximum).
- 8. Click Next. The Administrator Setup screen displays:

| Please carefully select a Sy long. It will unlock all syste comply with HIPAA regulati THIS IS A VERY IMPOR | stem Administrator password. The pa em functions and can reset ANY user p ons, be sure to NOT post it in a consp TANT PASSWORD. | ity assword should be 4-20 characters bassword. Keep it secure. To acous place. |
|--|--|--|
| Administrator Setup | | |
| System Administrator ID | Admin Password | a (I |
| admin | Confirm Password | a |
| Practice Address1 Practice Address2 Practice City | Postal Code | |
| Practice State/Prov | | |
| Practice State/Prov Practice Telephone Practice Fax Practice Email | 4441112222 | C Phone number is locked in fter registering the software. Group NPI (if applicable) |
| Practice State/Prov Practice Telephone Practice Fax Practice Email Practice Website | 4441112222 | Phone number is locked In fter registering the software. Group NPI (if applicable) |

IMPORTANT: The System Administrator is the software user delegated to maintain software settings and security levels, to add or delete users, and to register the software. This individual should be a trusted, long-term employee (preferably someone with good computer knowledge). The password that is selected must be remembered (unlike user passwords, it is not easily reset). Keep the System Administrator password in a secure location that is not easily accessible by others.

9. Click Next. The Primary User Setup window displays:

| \mathbf{N} | First-Tim | e | User's Se | tup | | |
|--|---|--|---|--|--|---------------|
| This for | m will let vou seturn vo | ur fi | rst few users. It i | s advisable to set | vourself up as th | e first use |
| ou ma | add an unlimited nun | iber | of users in the Ad | Imin section. You | must enter a mini | mum of O |
| iser at | this time. | | | | | |
| Enter th | e name of the users be | elow | ¢. | | | |
| 1222-12 | First Name | MI | Last Name | UserName | User Type | Security |
| Jser I: | 106 | EX. | Shitti | Ishiuri | Flovider | 10 |
| Jser 2; | | - | | | | |
| Jser 3: | | | | | | |
| Jser 4: | | _ | | | | 1 |
| | | | | | | |
| Jser 5: OTE: T sernam west le | he first time you sign e (first initial + last na vel and 10 has the hig Code Sets | on t me) hes | i o a new user acco . Security level will t privileges. Diagnosis | unt, the Password I default to "5" if le | i will be set equal ft blank. Level 1 cedures) | to the is the |
| Jser 5: OTE: 1 sernam west le | he first time you sign e (first initial + last na vel and 10 has the hig Code Sets © ICD-9 © ICD-10 © Combined ICD | on t me) hes | I o a new user acco . Security level wil t privileges. Diagnosis ICD-10 | unt, the Password I default to "5" if le | i will be set equal ft blank. Level 1 cedures) ING SOONI | to the is the |
| Jser 5: OTE: 1 sernam west le | he first time you sign e (first initial + last na vel and 10 has the hig Code Sets © ICD-9 © ICD-10 © Combined ICD Internatio | on t me) phes c 9 t | I o a new user acco . Security level wil t privileges. Diagnosis ICD-10 ICD-10 ICD-10 | unt, the Password I default to "5" if le 5 and Proc D-10 CODES COM I S | i will be set equal ft blank. Level 1 cedures) ING SOONI | to the is the |
| Jser 5: OTE: 1 sernam west le | he first time you sign e (first initial + last na vel and 10 has the hig Code Sets © ICD-9 © ICD-10 © Combined ICD Internatio | on t me) phes 7 (/ 9% | I o a new user acco . Security level wil t privileges. Diagnosis ICD-10 ICD-10 ICD-10 ICD-10 Formatting M | unt, the Password I default to "5" if le and Prov D-10 CODES COM IS ask Form | i will be set equal ft blank. Level 1 cedures) ING SOON! | to the is the |
| Jser 5: OTE: 1 sernam west le | he first time you sign e (first initial + last na vel and 10 has the hig Code Sets © ICD-9 © ICD-10 © Combined ICD Internatic General date format: | on t me) hes f (| l o a new user acco . Security level wil t privileges. Diagnosis ICD-10 ICD-10 ICD-10 ICD-10 Formatting Mamm/dd/yyyy | unt, the Password I default to "5" if le 5 and Prov D-10 CODES COM IS ask Form | i will be set equal ft blank. Level 1 cedures) ING SOON! NG SOON! | to the is the |
| Jser 5: OTE: 1 sernam west le | he first time you sign e (first initial + last na vel and 10 has the hig Code Sets © ICD-9 © ICD-10 © Combined ICD Internatic General date format: Telephone formatting | on t me) hes 7 (/ 91 0 0 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | I o a new user acco . Security level wil t privileges. Diagnosis ICD-10 ICD-10 al Setting Formatting Mamm/dd/yyyy [999] 999-9999 | ask Form | i will be set equal ft blank. Level 1 cedures) ING SOON! NG SOON! Atting Preview /2011 | to the is the |
| Jser 5: OTE: 1 sernam west le | he first time you sign e (first initial + last na vel and 10 has the hig Code Sets © ICD-9 © ICD-10 © Combined ICD Internatic General date format: Telephone formatting Postal Code format: | on t me) jhes 7 (1 9 5 0 7 1 9 5 | I o a new user acco . Security level will t privileges. Diagnosis ICD-10 ICD-10 ICD-10 Formatting Mam/dd/yyyy (999) 999-9999 99999-9999 | and Prod and Prod b-10 CODES COM S ask Form (912) (912) (915) | i will be set equal ft blank. Level 1 cedures) ING SOON! NG SOON! /2011 345-6789 | to the is the |

Enter your primary user information in the spaces provided. The system will automatically generate a username for you when once you enter your name. You can accept the username or create your own (your username must consist of at least five characters). If you have two users with the same last name and first initials, you will have to create a custom UserName for at least one of them (since the default username is first initial plus lastname)

International Settings - if you are using the software outside the United States you will likely need to adjust the date format and metric measurements.

10. Click Next. The Password Information window displays:

When you first log into the USER account, you will need to enter the default password. The default password for users is the same as the UserName (so for "jsmith", enter the password as "jsmith"). You will then be prompted to enter a new password.



11. Restart the software. You will see a notice that the Trial Period has begun.

12. Open ezScriptWriter and sign in to the <u>Administrator</u> account to review/set the security options.

3.1.2 Password Selection

It is a good practice to choose a secure password. To often an easy-to-guess password is chosen, which defeats the whole purpose of passwords! A strong password would look like "r%i1L" or "sus99an1". A secure password should contain:

- No less than 6 characters
- Not be the same as your user name, personal name or birthday
- Does not sound like a dictionary word (e.g. "glove")
- Contains a combination of capital & lower case letters, numerical and/or special characters.

Having a simple password can leave you vulnerable to guessing or dictionary attacks, which can lead to unauthorized access to patient information. HIPAA regulations require that you make every attempt to secure your data. We recommend you use a password that has at a minimum eight characters and contains a combination of both letters and numbers. Passwords should be changed regularly.

3.2 Getting Started



How do I login as a User? How do I login as a Administrator? How do I recover a lost password? How do I access FAQ (frequent questions)? How do I access the User Manual (pdf)? How do I use the demo patient "Joe Sample"?

3.2.1 User Login

When you come to the Main Menu of ezScriptWriter, you are automatically logged in. However, if you click the Logout button or are timed out due to inactivity, you will need to log back in before proceeding. You have three attempts to login before the software closes. The screen you will see will have buttons similar to those below:



After you click the User Login button, the following screen appears. You must enter your UserName (as setup by your Administrator) and password. You can change your password at any time by clicking the "Change Password" link. Click the Login button at the lower right to complete the login process.

| <u> </u> | t Logii | | | |
|------------------------|----------------------|------------------|-------------------|-----------------|
| 1840-0344 | www. | 100 | | |
| UserNo | ame: Idoktor | <u> </u> | | |
| Passw | ord: | S | hange Passwo | <u>rd</u> |
| Use of this software m | eans that you have n | ead, understood, | and agreed to t | he user license |
| Click | HERE to view the | User Agreement. | All rights reserv | /ed. |

3.2.2 Administrator Login

Once you have <u>logged out as a user</u>, you can re-log in as the Admin. Special features are available for the Admin, including the ability to create user accounts, set security levels and manage the software account.



STOP

WARNING: Be sure to Log Off of the Admin account when you have completed your work.

3.2.3 Lost/forgotten passwords

NOTE: The first time a user attempts to login, the default password is the same as the assigned UserName. After the first sign-in, the User must change the password.

Via User - Change Password

The User can change their own password after clicking the User Login button (only if they remember the password; if not, see below for details on resetting the password of a user).

| 🚨 User | Login | | | |
|--|-------------------|-------------------------------------|---|---------------------|
| UserName: | idoktor | | | |
| Password: Use of this software means (Click: <u>HER</u> | hat you have read | , understood, an er Agreement, A | nge Password d agreed to the II rights reserved | user license. 1. |
| | | V | / Login | 🗙 Cancel |

Enter the old password then create and enter a new password. The software will not allow you to create a blank or single letter password. If you mis-enter the password(s), you will be prompted to try again.

| Change Password | |
|---|---|
| 🙉 Char | nge Password |
| User Name | idoktor |
| Old Password | |
| Leave the next wish to have a case sensitive. | two fields blank if you do not password. All passwords are |
| New Password | |
| Confirm Password | |
| | 🕖 📝 Okay 💢 Cancel |

Via Admin - Resetting a Forgotten User Password First, you must sign in as the Admin. Then click the Reset Passwords button.

| Se Administrator Functions | |
|----------------------------|------------------|
| 🧝 System Administrato | or Menu |
| | 1 2 |
| Software Account | Reset Passwords |
| Settings & Options | View Audit Trail |
| | SysInfo X Close |



NOTE: When the password is reset, it becomes the same as the UserName. So user "jsmith" will have a password of "jsmith" which must be changed on the first login attempt.

Admin Password - Lost/Forgotten

The Admin password is set when you first setup the software. If you have forgotten it, you can reset by clicking the "Forgot Password" next to the Admin login button.

| 🖉 Secure Lo | gin | | | |
|-------------|--|---|--|--|
| | Syste | m Adn | nin Login | |
| | UserName: Password: | admin | Lost Admin Passw | iord? |
| Use of this | software means (Click <u>HER</u> | that you have read, IE to view the Use | understood, and agreed to the Agreement. All rights reserve | e user license. d. Cancel |
| Use of this | UserName: Password: software means (Click <u>HEF</u> | admin I that you have read, IE to view the Use | Lost Admin Passw understood, and agreed to the Agreement. All rights reserve | rord? e user license. d. Cancel |

Change your password by entering the current password (you will be prompted to enter a new one). Or, if you have lost your password, enter the code provided by TechSupport to reset the Admin Password.

| 🔦 Reset Admin Password | |
|--|-------------------------|
| Admin Password Reset Utility | |
| This utility will allow you to either change your Admin password (if you know the existing p or reset the password to a default value (for your protection, this requires a code from Tec | assword) :h Support) |
| NOTE: Choose a password that is both unique and memorable. | |
| Change the Admin password Current Password: | |
| Reset the Admin password (if you have forgotten your current password) Unlock code (provided by Tech Support): Request Code | |
| 🕜 🗸 Okay | Cancel |

3.2.4 FAQ (frequently asked questions)



3.2.5 User Manual (pdf)

Click on the User Guide on the Main Screen to view the printed (pdf) version of the help manual.



3.2.6 Sample Patient

The software comes with a demo patient that you can use to create practice charts, reports, Rx's and such. You can also create your own sample patients, however we recommend that you use the default sample patient for these reasons:

- 1. "Joe Sample" is known to the software for being a demo patient, and all reports and charts are ignored when creating "real" reports.
- 2. The default sample patient can be closed even with open (unsigned) reports/Rx's. Normally you can't close patient charts if there are unsigned items.
- 3. Tech Support will have you test with this patient.



<u>WARNING</u>: Do not delete the Joe Sample patient! Simply close the file by right-clicking and selecting Close.

3.3 Navigating the Program

The Main Screen of the ezScriptWriter is divided into two primary sections: the left side section is the Button Menu and the right-side is the Open/Active Charts List. Much like in a paper-based office, charts can be created and "opened". When in "opened" status, they display in the Open Charts. To avoid confusion, the term "Charts" relates to the patient demographics and Encounters relate to an exam chart.

| | | ACTIVE CHARTS: | QUICKFIND | S 20 |
|--------------------------|---------------------------|---------------------------------------|-----------|-----------------|
| Create New Chart | Dpen a Chait | Chagluak, Caryn D Sample, Joe | | |
| Search for Patient | O Patient Reminders | Contract of the Desting of the | | |
| Biling Module | Appt Scheduler | | | |
| Recall Wizard | Import/Export | | | |
| Special Functions | Program Settings | | | |
| M Instrument Link | Pre-Testing | | | |
| R Free ePsescribing | Software Versions | | | |
| | | Chart Options Close All Signed Charts | | |
| AST BACAL # 11/11/2010 # | Backup1117101143/azDB dez | | | 🖓 LogOut 🔀 Quit |

Open Charts Section

When you are doing work on a patient's Chart, it usually needs to be in "open" status. By double clicking on the patient name, you open the Encounter List for that patient.

Patient Status Icons:

- Female Patient (red)
- 🐕 Male Patient (blue)
- Cender not specified
- Sticky Note present click the patient name once to read or edit.

Right-Click Menu Options:

View Encounters - Opens the Encounter List Edit Demographics - Opens the Patient Demographics Modify Name - Allows a patient name to be changed. Attach Document - Allows you to attach a document (or scan one directly to the chart) Message Manager - Add a <u>Sticky Note</u> or Billing Note Close & Refile Chart - Closes the chart; will disappear from Open Ledgers list

3.3.1 Main Menu





Create a new patient chart? Open an existing chart? Search for a patient? View patient reminders? Use the Recall Wizard? Use the Special Functions? Customize program settings? Find out about ePrescribing? Import or export data?

3.3.2 QuickFind Tool

Using the Q-Link Tool, you may enter some, or all, of a patient's name to quickly pull up their chart. You may use just a single letter of either the first or last name, or as many as you wish. The more letters you enter, the more unique your search results. You may also us the wildcard character "*" to indicate that you do not know the letter. Just press the Enter Key to quickly start the search.



If you wish to search by Chart Number, simply enter the number you are searching for and the matching patient will be displayed.

Examples

Imagine we are trying to quickly pull up Margaret Smith, while trying to type the minimum number of letters. We could try it each of the following ways. The best method is to enter two letters of both first and last name.

| Typing | smith, m | |
|---------|----------|--|
| · Jpmg. | | |

Would find the following:

| 2 | office of the | | | | | | етодгарнис | s I III Encount |
|----------|---------------|-------------|----------|---------|------------------|-----------------------|------------|-----------------|
| B | DYDYE | <u>TFGH</u> | TY | JYKY | LYMYN | TOTPLOTATS | ΥΤΟΥΝ | YWXYY For |
| Las | st Name | First Name | M | Pat ID# | DOB | Insurance | Last Exam | Physician Name |
| 🖅 Smit | thi (| Margaret | 100 - 11 | 001001 | INVESTIGATION OF | AK Medicaid - ACS | 03/26/2009 | Pedigo, David J |
| 🕀 Smit | th (| Marlene | | 000264 | INCOMP. | Premera Bluecross | | Pedigo, David J |
| IFI Smit | th | Melody | | 001332 | 000100 | | 05/27/2009 | Pedigo, David J |
| IFI Smit | th | Myrtle | M | 000147 | Designation | First Health Services | 08/24/2008 | Pedigo, David J |

 $\mathbf{\nabla}$

Typing:

Would find the following:

| BICIDIE | FIGH | TY | JKY | LMN | TO POTRY S | TUT | (WXY)F |
|------------|------------|----|---------|-------------|------------------------|------------|-----------------|
| Last Name | First Name | Mi | Pat ID# | DOB | Insurance | Last Exam | Physician Name |
| F Saccheus | Margaret | Ŀ | 000043 | | First Health Services. | 08/18/2008 | Pedigo, David J |
| E Sheldon | Marie | R | 001303 | Discont and | | 05/25/2009 | Pedigo, David J |
| + Shield | Mary | | 000353 | IONS IN | Regence Blueshield | 03/24/2009 | Pedigo, David J |
| ⊕ Smith | Margaret | | 001001 | inn 21 mm | AK Medicaid - ACS | 03/26/2009 | Pedigo, David J |
| +) Smith | Marlene | | 000264 | is an ma | Premera Bluecross | | Pedigo, David J |
| a Snell | Marilyn | н | 000588. | simple a | Premera Bluecross | 11/15/2008 | Pediao, Davidul |

Typing:

Would find the following:

*;margaret

| | ~ | | | | أحري الم | | | |
|---|------------|------------|----|---------|--------------|-----------------------|------------|--------------------|
| ľ | BICIDIE | <u> </u> | 11 | JĮKĬ | LĨMĨN | TOTPIQIEIS | ΥΤΫ́υΫ́ν | <u>/]W]X]Y]</u> Fa |
| | Last Name | First Name | M | Pat ID# | DOB | Insurance | Last Exam | Physician Name |
| Ы | + Ferguson | Margaret | | 000660 | (California) | | 12/06/2008 | Pedigo, David J |
| 1 | 🖽 Londo | Margaret | M | 000607 | 行的有利的规范 | Cigna Healthcare | 12/03/2008 | Pedigo, David J |
| 1 | E Saccheus | Margaret | 4 | 000043 | R SERVICES | First Health Services | 08/18/2008 | Pedigo, David J |
| | l∓l Smith | Margaret | | 001001 | 2841 (11738) | AK Medicaid - ACS | 03/26/2009 | Pedigo, David J |

3.3.3 Patient Charts

34



How do I create a new patient chart? How do I find and open an existing patient chart?

3.3.3.1 Create a New Patient Chart

1. Click the New Patient button



2. Enter the patient demographics. Note that only the first name, last name and date of birth are required to create the chart.

| Demographics | More Info | HIPAA | Notes | CREATE NEW | PATIENT |
|---------------|--|------------|--------------------|--------------------|-----------|
| Last Name | Tester | | Gender | 🦳 Male 🖓 Female No | |
| First Name | Bog | Initial | Identification# | | |
| Title | · Suffix | | Provider | Pedigo, David J | . U |
| Date of Birth | 01/01/2000 | Age 11 | Insurance Infor | mation | |
| Address1 | | - Certimet | Ins Company | 2006 | 3 |
| Address2 | | | Insured Name | Self | X |
| Ch | | | Relationship | 🖻 Patient 🛛 Gua | antor |
| State/Piny | -1 | - | Insured ID# | | |
| Home Phone | - | | Policy Group# | | |
| Day Phone | | | Authorization# | | |
| Email | | | Notes | | 18 |
| Employee | | | | | - 58 |
| Becamation | | | | Additional Insuran | ice Plans |
| Phot Exam | | E HIPAA N | otification on Ba2 | T Rad Address | Inactaire |
| With Fridaile | | | onn-soon on 1987 | In sourcess in | Industre |
| Print | Ledger | | ſ | 2 Save | Close |
| | and the second s | | L. | 2 m | |

3. Click the Save button to create the new chart.

Duplicate Patients

If a patient already exists in the system, you will see the Duplicate Patient screen after you enter the name and date of birth. If a patient matches, click the checkbox next to the name and click the Select button to open that patient's chart. Otherwise, click Close and continue entering patient demographics.

| ato Datio | nt l | Findor | | | | |
|-------------------|-------------------|------------------------|---------------------------------------|---|---|---|
| First Name Joe | MI R | DOB 12/30/1967 | SSN | Home Tel (222) 333-4444 | Last Exam 08/11/2009 | PatientID 1 |
| | | | | | | |
| | | | | | Select | 🗙 Close |
| | First Name Joe | First Name MI Joe R | First Name MI DOB Joe R 12/30/1967 | First Name MI DOB SSN Joe R 12/30/1967 | First Name MI DOB SSN Home Tel Joe R 12/30/1967 (222) 333-4444 | First Name MI DOB SSN Home Tel Last Exam Joe R 12/30/1967 (222) 333-4444 08/11/2009 |

3.3.3.2 Open an Existing Patient Chart

There are two methods to open an existing patient chart:

Method 1 - QuickFind Tool

This is the preferred method for quickly finding a patient. Using the **QuickFind** field, you simply need to enter a few letters of the patient name and press **Enter**. The list of matching patients is displayed in the **Patient Listing**.

| OUTCHETNO | 10 | | 872 |
|-----------|----|----------|-----|
| QUICKLIND | | <u> </u> | 10 |

Method 2 - Patient Listing

This method allows you to view complete lists of you patients, arranged in alphabetical order. When in Patient Listing view there are additional features available by right-clicking the patient name.

| 📴 Create New Chart | Open a Chart |
|----------------------|------------------|
| P Search for Patient | O Tent Reminders |

To find a patient, click on the Letter tab at the top and scroll down. You may double-click the patient name to directly open to the Demographics screen. You may also enter the name in the Search Box at the top of the Patient Listing.

| Last Name | Mane | M | Pat D# | 008 | Insurance | Last Exam | Physician Name |
|------------|-----------|------|--------|--|---|------------|-----------------|
| Favbanks | Thereau | | 002458 | Charlen of Females, Spinster, Spinster, Spinster, Spinster, Spinster, Spinster, Spinster, Spinster, Spinster, S | AK Medicaid - ACS | 10/26/2010 | Pedigo, David J |
| E Fak | John | | 000946 | r-shores | RBMS, LLC | 02/28/2009 | Pedigo, David J |
| Favicett | David | H | 000947 | and speciality | Premera Bluecross | 02/28/2005 | Pedigo, David J |
| i) Feldman | Maya | | 002212 | (iii)a jitta | and a second | 09/21/2010 | Pedigo, David J |
| Farguson | Christing | | 000265 | and the second | Private Pay Cash | | Pedigo, David J |
| F Ferguson | Margaret | | 000660 | (milling I miles) | | 12/06/2006 | Pedigo, David J |
| + Fergunon | Ray | | 000359 | distances. | Private Pay Cash | 020025500 | Pedigo, David J |
| Fernvoyle | Lance | | 002338 | 10110-013 | The second se | 10/19/2010 | Pedigo, David J |
| Ferrazzi | Tom | | 002054 | Income and | | | Pedigo, David J |
| ei Ferris | Justin | | 000943 | 1-11-104 | RBMS, LLC | 02/27/2009 | Pedigo, David J |
| Field | Audrey | | 001699 | Line inte | | 10/24/2009 | Pedigo, David J |
| Field | Carol | | 000290 | AD THE OWNER | Aetna | 10/24/2009 | Pedigo, David J |
| +) Feid | Elaine | 11 | 000305 | Including Street | AK Medicaid - ACS | 04/24/2009 | Pedigo, David J |
| Field | Hannah | | 001208 | 1010100 | | 10/24/2009 | Pedige, David J |
| + Fields | Antonina | - 11 | 000270 | Statute of | Premera Blueoroas | | Pedigo, David J |
| Fields | Christina | | 000965 | Contract Head | NTCA | 03/23/2009 | Pedigo, David J |
| i) Fielda | Loren | | 000967 | Company of the local division of the local d | NTCA | 03/23/2009 | Pedigo, David J |
| i) Flies | Ashlyn | | 000684 | lamined | REMS. LLC | 12/07/2008 | Pedigo, David J |
| + Fies | Kristen | | 000863 | and so a real of | RBMS, LLC | 12/07/2008 | Pedigo, David J |

3.3.3.3 Patient List

The Patient Listing is the main dashboard for working with patient's demographic charts. You enter the Patient Listing by either using the <u>QuickFind</u> tool or the <u>Find Existing</u> button.

| Last Name | Mane | M | Pat D# | 008 | Insurance | Last Exam | Physician Name |
|----------------------------|-----------|------|---------|-----------------------------|-------------------|------------|-----------------|
| + Fairbanks | Thereau | | 002459 | that is not | AK Medicaid - ACS | 10/26/2010 | Pedigo, David J |
| E Fak | John | | 000946 | 1-0107085 | RBMS, LLC | 02/28/2009 | Pedigo, David J |
| + Favicett | David. | H | 000947 | and second | Premera Bluecross | 02/28/2005 | Pedigo, David J |
| i Feklman | Maya | | 002212 | (iii) in (iii) a | | 09/21/2010 | Pedigo, David J |
| Farguson | Christine | | 000265 | STOCKED IN | Private Pay Cash | | Pedigo, David J |
| F Ferguson | Margaret | | 000660 | period state | | 12/06/2005 | Pedigo, David J |
| + Fergunan | Ray | | 000359 | Surgers and | Private Pay Cash | 020122000 | Pedigo, David J |
| Fernvoyle | Lance | | 002338 | 10110-003 | | 10/19/2010 | Pedigo, David J |
| (Ferrazz) | Tom | | 002054 | 10001000 | | | Pedigo, David J |
| • Ferris | Justin | | 000943 | 2-22-08 | RBMS, LLC | 02/27/2009 | Pedigo, David J |
| F Field | Audrey | | 001699 | L TIRCTINE | | 10/24/2009 | Pedigo, David J |
| +) Field | Carol | | 000290 | 10110-008 | Aetna | 10/24/2009 | Pedigo, David J |
| i) Feid | Elaine | M | 000305 | In statement | AK Medicaid - ACS | 04/24/2009 | Pedigo, David J |
| E Field | Hannah | | 001208 | 10403486 | | 10/24/2009 | Pedige, David J |
| Fields | Antonina | - 81 | 000270 | STATISTICS. | Premera Bluecross | | Pedigo, David J |
| Fields | Christina | | 000965 | 1.0 million i reined | NTCA | 03/23/2009 | Pedigo, David J |
| i) Fielda | Loren | | 000967 | Summer State | NTCA | 03/23/2009 | Pedigo, David J |
| i) Fles | Astilyn | | 000684 | jumi, juni | REMS_LLC | 12/07/2008 | Pedign, David J |
| T.Films | Kristen | | 0000663 | Station of Concession, Name | RBMS, LLC | 12/07/2008 | Pedigo David J |
Double clicking on a patient name opens the demographic screen. Right-clicking a patient name opens up the additional features menu. Note that you MUST have the patient name highlighted for the menu to open.

| TTI I SITTISTIS | | |
|-----------------|-------------------|-------------|
| Carraz | Bullindeer | 002054 10/2 |
| (| Puli Legger | 100943 01/0 |
| (Field | View Demographics | 101699 07/0 |
| | | 00290 02/1 |
| (+) Field | Bad Address | 100305 11/0 |
| Field | 260.00 PS 10 | 01208 12/0 |
| Fields | Mark as Inactive | 100270 03/1 |
| | Delete Patient | 100968 12/0 |
| (+) Fields | Deleter aberre | 100967 10/0 |
| ⊞ Files | Merge Duplicates | 00664 04/0 |
| [+] Files | | 100663 07/1 |
| | Exit | - |
| urrent All Phys | icians 💌 | Dele |
| 'nysician: ' | | |

Pull Ledger

This option pulls the chart and adds to the **Open Ledgers** screen. It does not display the Demographics screen. This is useful if you need to pull multiple patients.



View Demographics

Opens directly to the patients demographic screen (equivalent to double-clicking the patient name in the **Patient Listing**).

Bad Address

Allows you to mark the patient as having a "bad address", without having to open the demographics screen.

Mark as Inactive

Allows you to mark the patient as "inactive", without having to open the demographics screen.

Delete Patient

Allows you to delete the patient chart. Note this requires you to have sufficient Security Level to perform this action. The Admin function in the Main Module allows for security settings to be adjusted.

Merge Duplicates

If you accidentally create two charts on the same patient (for instance because of a name change), you can merge the data together. The merge function keeps the demographics of the "First" patient (which you select by chart number) and merges all documents and reports under that first patient ID. There is no undo function, so use this function with care.

| 🕾 Merge Patient Chart Tool | X |
|--|-------------------|
| Merge Patient Charts | |
| The Merge Function is used to combine two charts into one (espec when a duplicate chart exists). All demographics, encounters, note reports and Rx's for the 2nd patient are combined under the selecte chart number. | ially s. ed |
| WARNING: You are about to merge two patient charts. There is no 'Undo' feature available. Make sure you hav selected the correct chart number(s). | e |
| Enter First Chart# 000001 Enter Second Chart# Merge Method | |
| Combine into FIRST chart # | J |
| | ei |

Exit

Leaves the menu without change.

Button Bar

The Button Bar at the bottom of the Patient Listing allows a few additional features.

| Current Physician: | All Physicians | 🗊 Delete Chart | <u>)</u> New Chart | 🎒 Show All | 🖌 Okay |
|--|----------------|---------------------------------------|--------------------|------------|--------|
| Concertainty of the second s | | · · · · · · · · · · · · · · · · · · · | | | |

Select Current Physician

If you wish to display only charts for a selected physician, use the dropdown box to choose the physician. The default is to show all physicians.

Delete Chart

Allows you to delete the patient chart. Note this requires you to have sufficient Security Level to perform this action. The Admin function in the Main Module allows for security settings to be adjusted.

New Chart

Same function as clicking Create New Patient button.

Show All

All patients in the database are shown in a single list. Note: This may take a long time to run, if you have a large number of patients (in excess of 20-30K). The actual patient list can be exported using the Import/Export feature in the Main Module.

| 14 | ntire Pa | tient List | | | | | | | |
|------|-----------|---------------|------|-------------|-----------------|--------------|---|-------------------------|--------------------|
| | | | | | | | | Chett Be | e feladings fel is |
| 0.01 | LatMen | Feet Name | | | (Address) | Chý . | The Part of Party of | inital Einite Tat | LATER |
| 1 | Tenglit | Jim: | | 10/38/1967 | 123 Smith Sheet | - Saudia | 14,05 | \$6007 \$223} 313.4444 | 6/11/2009 |
| 2.1 | Desight | Danie | | 10/4/1982 | PG 8xxx,9007/ | Area . | | 99753 (307) 963-6532 | 0/15/2008 |
| 3 | Nacos,A. | Baye | - K. | 10/02/1909 | PD 8== 53036 | Area . | 146. | 98753 (90)) 963-2396 | 0/15/2088 |
| 4 | HarnA. | . Arrie | | 405/1980 | PG 8mi 53095 | Area . | - 44. | 99753 (907) 963,5404 | 0/15/2008 |
| 5 | Mania | Chail | - R | 1/05/1993 | PG 8m 843 | . Kattada as | | 93705 19071963.3141 | 10/20/200 |
| 6. | Neste | 1000 | 1 | 4/25/1967 | PD 8m 843 | Summers. | 1.44 | 99753 (907),763,3141 | 10/20/200 |
| 7 | Mansa | Attaine . | - PL | 2/5/1998 | PD 8/w 03171 | Royal. | | 93753 | 0/15/2088 |
| 8.1 | Chates. | - Sheet | | 8/29-1961 | PD 8vix 33848 | Raph. | 1.146 | 93763 (30)/) 963.2362 | 0/15/2009 |
| 9. L | Mandok | Drew | C | 3/13/1997 | PB 9/w 8#3 | Ridtadausi | 1.440 | 93753 (107) 963 2141 | 10/11/200 |
| 10 | Challes. | Luille | 5 | 1.08/1984 | FO 944 1008 | Ropal. | 1.140 | 93753 (90)/1963 (168 | 0/15/2088 |
| ŧt | times, | Event | | 1/0/1983 | PO 944-53096 | Rappel. | 146 | 93753 (937) 963,5691 | 0/15/2008 |
| 12 | Anyongië. | Deal | | 11/1.3/1968 | PO Build EXXI7 | . Kopal | 1.46 | 99763 (907) 963-2316 | 0/15/2888 |
| 12 (| Height | Magan | | 42/25//2001 | PD 3vie 5386 | . Kopá | . WW | 99763 (907) 963 2401 | 0/15/2888 |
| 14 U | Chales | Abrei | | 1.034/1953 | PD 8(w 1) | Ropal. | 146 | 99763 (907) 963-2360 | 0/15/2888 |
| 12. | Nexton | - Gay | D | M/10/1986 | PD Box EBH2 | August . | 10. | 99763 (907) 963,5483 | 0/15/2888 |
| 18. | Durang | Bedat | - A. | 11/24/1971 | FD 8xx 53082 | . Kopul. | 146 | 93753 (937) 963-2248 | 0/16/2888 |
| 17.5 | Desery | Ambia | - W. | 11/1/1994 | FD 8 via 153052 | Rappal. | - 46 | 93707 (937) 983-2248 | 0/16/2888 |
| 12 | (Denny) | Jeanue | | 111/1998 | PD 844 53082 | R. mail | - 46 | 93753 (937) 983-2240 | 8/16/2888 |
| 15 | 0228890 | Dorè | | 1/8/1993 | PD 9/wi 53387 | Kopal. | .46 | 98/101 (907) 963-2222 | 0/16/2888 |
| 20 | 0.1100 | Duroffe | | 11/11/1903 | HD 8/w 53063 | Royal. | 146. | 93702 (907) 983 3001 | 0/16/2008 |
| 21 | Heig. | Calence | - A | 2/14/1984 | PD Box 5307 | 8.00-A | 10. | 99702 (907) 963 2483 | 0/16/2888 |
| 2 | Rephase: | 4.014 | - 1 | 9/23/1981 | 20 B/w 53/17 | 8.00-A | 1.46. | 93707 (907) 983-0016 | 0/16/2888 |
| 22 (| Chales | Lines | | 8/8//1993 | PD Box 500E1 | 8.00-A | 1.44 | 93703 (937) 983-9521 | 8/16/2008 |
| St | Milgrad | . Sate | - 11 | 1/25/1986 | PD Box EDH 10 | 8.00-B | 1.44 | 99707 39071963-4001 | 0/16-2888 |
| ð., | RANNOR. | Fields | | \$126/1987 | PD 9/w 50049 | 8,0048 | 1.44 | 99707 19071963-2362 | 0/16/2008 |
| 35 | HABILY | Detell | - 1 | 414/0683 | PD Box 5X001 | R.m.a | 1.44 | 99707 (907) 963-2238 | 8/16/2988 |
| 9.S | MatrixA | Opharen | | 1,07/1982 | PD 9(w/53394 | R.mull | 14 | 99703 (907) (963-2386 | 8416-2008 |
| 3 | NacioR | END9 | | 1044741981 | PD 9xx 75334 | R.m.a | 144 | 99.7日 (田口) (833-2388 | 8/16/2008 |
| 29 | Designer | Distant | | DOM: NOTION | CREW ROW TO NOT | Everal. | 1.1.68 | 997112-2011-0414-1-0025 | 6/12/2008 |

3.3.3.4 Patient Demographics Screen

The Patient Demographics screen is the primary location of all patient contact information, as well as insurance and billing details.

The Demographic screen has four primary tabs and a lower button bar:

Basic Demographics

| Demograph | ics More Info | HIPAA | 🖋 Notes | |
|-------------------|--|------------------|-------------------|-----------------------------|
| | and the second s | | | |
| Last Nar | me - required (apostro | phe's are allow | ved; minimum ' | 1 character) |
| First Na | me - required | | | |
| Middle I | nitial - optional (can e | enter multiple | characters) | |
| <u>NOTE</u> : Y | ou can enter the name | e in all lowerca | ase for speed; i | it will be converted |
| automatically. | | | | |
| Title - th | e patient's salutation | | | |
| Suffix - | generational suffixes s | uch as Jr, Sr, | III | |
| Date of | Birth (DOB) - highly re | ecommended. | Can enter just | 2-digit year, but day/month |
| require 2-digits. | | | | |
| Address | block - you can cust | omize the city | /state/zip list u | inder Settings in the Main |
| Module. | | | | |

NOTE: If you have entered the Guarantor/Subscriber for this patient already, you can use the blue arrow to pull the Guarantor's data forward

Home Phone - primary telephone at home (Note that there is no cellphone field; use the Custom Fields)

Day Phone - typically the work phone number; can be used for cellphone also **Email** - patient's email; will automatically check for correct formatting. **Employer** - will display on the Insurance Claim form

Occupation -

Prior Exam - date of last encounter with patient

| Last Name | Sample |
|---------------|----------------------|
| First Name | Joe Initial R |
| Title | Mr. 💌 Suffix 💌 |
| Date of Birth | 12/30/1967 Age 43 |
| Address1 | 123 South Street |
| Address2 | |
| City | Seattle |
| State/Prov | WA 🔹 98001 🔹 |
| Home Phone | (222) 333-4444 |
| Day Phone | |
| Email | joe.sample@yahoo.com |
| Employer | Boeing |
| Occupation | Paper plane modeler |
| Prior Exam: | 08/11/2009 |

Gender - recommended. if not selected, you will be prompted on saving chart
Chart No. - created automatically and cannot be edited or changed.
Identification # - previously for Social Security number; can be used for any ID you wish.
Provider - the patients provider (in your office)

| Gender | • Male • Female No. 000001 |
|-----------------|----------------------------|
| Identification# | |
| Provider | Doktor, Ima K 🔹 👻 |

Insurance Company - select from list (you can add new companies in the Settings) Insured Name - same as the Subscriber or Guarantor (e.g. who holds the policy) Relationship - how is the Subscriber related to the patient (self or guarantor) Insured ID - the insurance plan ID

Policy Group # - if the insurance plan has a group number, enter it here

Authorization # - if the insurance plan requires pre-approval and gives an authorization number **Notes** - do not display on Claim Form; for your own internal use

Additional Insurance Plans - click the button to add or view additional plans (only for 2nd or additional)

| Ins Company | Medicare Part B | |
|----------------|-----------------|-----------|
| Subscriber | Se | F 🚺 |
| Relationship | Patient | Guarantor |
| Insured ID# | 444-22-3333 | |
| Policy Group# | [| |
| Authorization# | | |
| Notes | has never used | benefit 🦷 |
| | | 16 W |

HIPAA Notification status - allows you to indicate that patient has read/understood HIPAA requirements

Bad Address - if mail is returned and you wish to remove patient from mailing/recall lists **Inactive** - if patient leaves the practice for some reason (charts will still be available for viewing)

HIPAA Notification on file? | Bad Address | Inactive

More Information

| Demographics | 🔥 More Info | HIPAA | 🔎 Notes |
|--------------|-------------|-------|---------|
| | 20 I.V | | |

Nickname - an alternate preferred name by the patient Marital Status - will display on the Insurance Claim form Hobbies - useful to track patient activities to assist provider rapport Source - what got the patient into your office Referred by - who, if anyone, got the patient into your office Family Group - if a patient is part of a family, you can indicate it here Emergency Contact - a person to contact if a medical emergency occurs in office.

| Nickname | Joey | |
|----------------|-----------------------|---|
| Marital Status | Married | |
| Hobbies | | - |
| Source | Professional Referral | |
| Referred by | Unspecified | X |
| Family Group | Unspecified | X |
| Emergency C | ontact Info | |
| Name 🔿 | | |
| Tel 📫 | | |
| | | - |

Race/Ethnicity - hold the mouse over the letters to see what abbreviations indicate. **Patient Picture** - if you wish to have an image of the patient you need to: (1) take picture with a digital camera or camcorder, (2) save the image to a shared network folder or similar, and (3) click the Set button to find and display the image. Click Clear to reset to blank image. NOTE: Patient photos display in the Main Module when you click the patient name once.



Custom Fields - up to six custom fields can be created for inclusion in the patient demographics. Once you create a field name, it CANNOT be altered. This is to prevent data mixing (e.g. you create a field called 'email' then want to change it to 'cell phone', but the original data remains). If you wish to change a field you can only create a new one (and stop using the old one). Custom Fields can contain nearly any data. Examples can include: Cell Phone, Facebook ID, Nursing Home Facility, Prior Chart #, etc.

| Cell Phone | 425-333-2323 | |
|-------------------------------|--------------|--|
| <click edit="" to=""></click> | | |

Chart Alerts - for important chart information that you wish to flag. The Alert icon will display at the top tab when you open the Patient Demographics, alerting you to the existence of a note. The Chart Alerts can be of any nature, but typically are special circumstances such as allergy notifications or collection accounts.

| Chart Alerts | Patient has a large outstanding balance; referred for collection. | _ |
|--------------|---|---|
| | PCN Allergy!! | |

HIPAA Information

| Demographics | 🚹 More Info | HIPAA | 🔎 Notes |
|--------------|-------------|-------|---------|
| | | - | |

Notification of Privacy Policy - checking the HIPAA box on first Demographics screen auto checks these two boxes.

| Notification of Privacy Policy | |
|---|--|
| MIPAA 'Notice of Privacy Practices' read and understood | |
| K Acknowledgement on file | |

PHI Disclosures - Patient Health Information disclosures can be tracked on this screen. Each time the patient or an outside entity sends a record request, you should use the "Add New" button to record the event. You can print the Disclosure list when/if a patient requests to know who has requested PHI. Be sure to click Save on the Patient Demographics screen to finalize the data.

| VD Provid | fer Request | Doktor, | Ima 🚺 | |
|-----------|-------------|---------|-----------|------------------------|
| | | | | |
| | | | | 님 |
| | | | | 븜 |
| | | | | 븜 |
| | | | | |
| | | | Add New 1 | Add New 1 Print Disclo |

| 😋 Health Informati | on Disclosure Log | |
|--------------------|--------------------------------|-----|
| Patie | ent PHI Disclosure | |
| | | ~ |
| Recipient: | Dr Mike Tyson, MD | |
| Reason: | Provider Request | |
| | 1 /27/2011 By: Pedigo, David J | |
| | 🕜 🗸 Okau 🗙 Can | cel |
| | | |

Privacy Requests - any specific privacy requests can be noted here

Patient-Specific Privacy Notes/Requests

| Do not give info out to anyonel | |
|---------------------------------|--|
| | |
| | |

Acquisition Date - the original date the patient was entered into the database (or otherwise acquired by the practice.

Recall Date - the date the patient is scheduled for recall visit.

| Original Patient Acquistion Date | 02/12/2008 | Recall Date | 08/11/2010 | |
|----------------------------------|------------|-------------|------------|--|
|----------------------------------|------------|-------------|------------|--|

Patient Notes

| Der | mographics | 1 More Infa | HIPAA | 1 | Notes | ٦ |
|-----|------------|-------------|-------|---|-------|---|
| | | | | | | |

Free Text Notes - any sort of billing or personal notes can be entered in this section. It is NOT for clinical notes (it is not printed as part of the chart). The "Time/Date Stamp" will automatically add a separator after you enter the note with current date/time information.

| | Add Time/Date Stamp |
|--|------------------------------------|
| Belinda, the patient's careperson, indicated that Joe will require wheelchair a | access in the future. |
| [The above was entered on 01/05/2010 05:14 pm, by user Pedigo, David. | 1. |
| Patient called about account balance; did not feel he should have to pay a Fold him that his copay is not covered by the secondary. | copay since he has two insurances. |
| [The above was entered on 01/27/2011 07:48 am, by user Pedigo, David. | ıj 🔶 |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

Lower Button Bar

| Customize | Print | | 🕜 📮 Save | Cancel |
|-----------|-------------------|-------------------------------|--------------|--------|
| | Patient has an ou | itstanding balance due on the | eir account. | |

Customize Button - allows customization of lists/dropboxes (e.g. city, state, postal codes)

Print Button - prints either a Demographic Summary page or address label (on DYMO printer only)

| Select Prin | nt Format | | |
|-------------|-----------------------------|------------------|--------|
| 1 | Select how you wish to prin | nt Patient data. | |
| | Summary | DYMO Label | Cancel |
| | | | .0+ |

Encounters Button - switches to Encounters view

Save Button - used after any changes are made to the demographic record. Also used to pull a chart when displayed in the Patient List into the Open Charts screen.

Balance Notice - if the patient has a balance due in ezClaimBiller, a red notification bar will display

3.3.3.5 Subscriber Info

In order to bill a patient's insurance plan, you will need to enter the Subscriber info. This screen can also be used to enter the Guarantor info for a minor patient (e.g. the parent or guardian). To open, click the Subscriber button in the Insurance Information section. NOTE: To clear a subscriber, click the red delete button.

| Ins Company | Medicare Part B | - |
|--------------|-----------------|-------|
| Subscriber | Self | X |
| Relationship | Patient C | antor |

The Guarantor/Subscriber screen will open. The default type is "self", but you can enter either an existing patient (by selecting from the displayed patient list) or enter a new guarantor/subscriber. Use the blue arrows to transfer information (such as same last name or address). Be sure to select the appropriate "Relationship to Guarantor".

| Guarar Guarar Guarar | ntor is "SELF" ntor is an existing p ntor is not a patien | satien t | use bl | ue arrow Demogra | s to copy data aphics screen | NOTE: A gua the patient's b for vision/med | rantor is the iling charges ical plans or | person who i . This would the 'Guardian | s responsible I be the Tinsu 1' for minors. |
|--|---|-------------|--------------|--|---------------------------------|--|---|---|---|
| 🗄 😤 Find: 🚺 | | | | | Reset | Self | Spouse | C Ehild | C Other |
| Last Name | First Name | 101 | Pat D# | DOB | insuranc + | | 2 | 2010 | |
| Ables | Boyd | | 000887 | ED-TSTEND | Vision Service | Last Name | | | |
| (E Ables | Sharron | | 000888 | 1000 | Vision Service | Fint Name | | | Initial |
| (+) Abraham | Delores | | 002455 | Interlation of the local division of the loc | | = 30000 | - | I Million | Triment 1 |
| (# Abraham | Stella Mae | | 002484 | 11062003 | AK Medicaid - | Title | | Suffor | il 📑 |
| Abrams | Katlyn | | 000695 | NACOTA | First Health Se | Shall. | 1 Adulta | C. Finder | |
| E Active | Margaret | | 002530 | ENDIFYER. | LKSD - Premier | Gender | mae | r ende | 140.1 |
| + Adams | Amber | C | 002138 | Dear and | | Date of Birth | 11 | | Age |
| (#) Adams | Bertha | E | 000425 | and reprint of | AmeriBen/IEC (| ARADIS | | | |
| (+) Adams | Bessie | | 000515 | 10021103 | Private Pay Ca | Address | 20 | | |
| (#) Adams | Charlene | | 000453 | 011010 | Private Pay Ca | Address | | | |
| E Adams | Doris | | 000019 | EVERYME | Private Pay Ca | 1004 | P | | |
| (#) Adams | Dorothy | | 000020 | 1111110 | Private Pay Ca | CHU | | | |
| (+) Adams | Frank | | 001038 | 10051846 | | State/ZIP | | | |
| [#] Adams | Gladys | S | 000438 | MARTHER. | Private Pay Ca | Linese Director | | | |
| + Adams | Gioria | | 001721 | ACCOUNT OF A | AK Medicaid | -Home mone | | | |
| E Adams | Henrietta | | 000460 | CONSTRAINT: | Premera Bluec | Employee | | | |
| | 1.477.014 | | and a lot of | and in case of the local division of the loc | | | 0 | | |

3.3.3.6 Open/Pulled Charts

The very first screen you see upon signing in is the Open Charts screen. Much like a chart pulled from a real file cabinet, Open Charts are available for viewing and creating items (encounters, Rx's, reports, etc). When you are done with a chart, it is "closed" and removed from the Open Charts screen. You close a chart by right-clicking the name and selecting "Close Chart". You can only close a chart that has all encounters, reports and notes finalized (except for the <u>Sample Patient</u>, which does allow immediate closing).

| Open Charts | QUICKFIND | I |
|---------------------------------------|-----------|---------------|
| 🍨 Chagluak, Caryn D 🥐 Sample, Joe | | |
| | | |
| | | |
| | | |
| Chart Options Close All Signed Charts | | |
| | | LogOut X Quit |

To use the Open/Pulled Chart, simply right-click the name to get a list of <u>Chart Options</u> or double-click to be immediately taken to the <u>Encounter List</u>.

Patient Photo's

If a patient has a photo entered in the demographics screen, click the name ONCE to view the image.



3.3.3.7 Chart Options

Right-click a patient name in the Pulled/Active Charts list to pull up the options menu.



How do I view Encounters? How do I edit Patient demographics? How do I modify a patient name? How do I attach a document to the chart? How do I create a message or note? How do I close/refile the chart?

3.3.3.8 Modify Name

Patient names (once the chart is created) can only be modified with this tool. This is done to both track name changes/reasons and to prevent data loss.

Right-click the patient name in the Open Ledgers view and select Modify Name.

| Vie | w FeeSlips & Claims |
|-----|---------------------|
| Edi | it Demographics |
| Mo | dify Name |
| Me | ssage Mana |
| Cld | se & Refile Chart |
| He | lp. |
| Ca | ncel |

The Modify Patient Name screen will show and you can enter the corrected name in the boxes at the bottom. Indicate a reason for the change and click okay.

| Modify Patient Name | |
|---|--|
| Modify Pa | tient Name |
| Current Last Name: Sample | Current First Name: Joe |
| WARNING: You are abo primary database. Note th then name listed on previo | ut to change the patient's name as stored in the at altering the patient's name will not change ously FINALIZED reports and/or encounters. |
| Update Patient Name | |
| New Last Name: Sampler | New First Name: Joe |
| Reason for name change: Miss | pelled |
| Modification History | 🕜 🗸 Okay 🗶 Cancel |

You can also view the history of name changes by clicking the Modification History button.

| III Name Modification History | |
|---|--|
| [Prior Name][New Name][Change Date][Change Reason][User] [Joe Sample:Joe Sample:06/14/2009:Misspelled] [Joe Sample:Joe Sample:06/14/2009:Misspelled:Pedigo, David J] [Joe Tomtest:Joe Sample:11/17/2009:Misspelled:Pedigo, David J] [Joe Sample:Joe TESTerr::11/17/2009:Misspelled:Pedigo, David J] [Joe TESTerr::Joe Sample:11/17/2009:Misspelled:Pedigo, David J] [Joe TESTerr::Joe Sample:11/17/2009:Misspelled:Pedigo, David J] [Joe Sample:Joe Sample:11/17/2009:Misspelled:Pedigo, David J] [Joe Sample:Joe Sample:12/16/2009:Misspelled:Pedigo, David J] [Joe Sample:Joe Sample:12/16/2009:Misspelled:Pedigo, David J] [Joe Sample:Joe Sample:12/16/2009:Misspelled:Pedigo, David J] | |

3.3.3.9 Sticky Note

You can add short "Sticky Notes" to a Open Ledger by right-clicking and selecting the Message Manager option.

| View | FeeSlips & Claims |
|--------|-------------------|
| Edit D | Demographics |
| Modif | fy Name |
| Mess | age Manager |
| Close | & Refile Char |
| Help | 8 |
| Canc | el |

Once the Message Manager appears, select the Sticky Note button.

| 🖽 Message Manager - Sample, Joe | • 📃 🗖 🔀 |
|---------------------------------|--|
| Massaging Ma | |
| | 114 |
| Sticky Note | Temporary note, attached to the patients pulled chart. Works just like a real sticky note and is viewable by all. |
| | Non-clinical notes viewable in the patient demographics section. Useful for billing and scheduling notes. |
| | Close |

The Sticky Note edit screen will appear and you can enter any text you wish. Once you save the note a date/timestamp will append (with the user's name).



To View a Sticky Note:

If a patient has a Note icon, simply click ONCE on the patient name to view it. You can also edit or delete the note, or click the View FeeSlips/Claims button to open the Encounter List.



3.3.4 Encounter List

The "Encounter List" is the main dashboard for viewing patient encounters (including Reports, Rx's and scanned/attached documents). You generally arrive at this screen by double-clicking the patient name, although you could also click the Encounters button on the Patient Demographics screen.

| ~ | | - |
|----------|------|--------|
| 2000 | 00 | See. 1 |
| | JUE | |
| | | - |

| All Pa | ges Enco | unters | RX's | Reports | Notes | Name (Chart# (DOB Provider (| Sample, Joe E 2000001 12/20/1977 Doktor, Ima K |
|--------------------|-----------|-----------|----------|---------------------|-------------------|---|---|
| Туре | Date | Status | | De | scription | - | Provider |
| <add new=""></add> | | | Double | click to add new En | counter or Note | | |
| EXAM | 03/10/200 | 8 PENDING | 743,48 | Congenital Anomali | es Of Anterior Cl | namber, Combi. | Doktor, Ima K |
| RX | 03/10/200 | 8 PENDING | Med Rx | (Tobradex) | | | Doktor, Ima K |
| NOTE | 02/27/200 | 98 FINAL | Consult | Report | | | Doktor, Ima K |
| DRAWING | 02/23/200 | 18 FINAL | Fundus | (Right Eye) Drawing | l.: | | Doktor, Ima K |
| BX | 02/12/200 | 8 PENDING | Spectad | cle Rx | | | Doktor, Ima K |
| BX | 02/12/200 | 8 PENDING | CL Bx (A | V Adv for Astia) | | | Doktor, Ima K |

There are several tabs across the top of the Encounter Screen to help you navigate to the correct item. You can double-click the <Add New> at the top of any list to add a new item.

Exams

All Pages

Shows all the items from every category

Encounters

If you are using the full EMR version, you will see a list of pending and finalized exam encounters. The first CPT assessment code will be displayed in the description field.

Rx's

The list of generated Rx's for a patient (that have been printed/saved). The full list of every Rx (even if not printed) will be shown by clicking the Logbook button.

Reports

The list of generated reports for a patient (that have been printed/saved).

Notes

If you have entered any notes on the patient they will display here.

Other

Drawings

If you are using the full EMR version, you will see a list of pending and finalized exam drawings. By double-clicking an image you will see the Image Manager display.

Photos

Not currently used in this version.

Attachments

The list of scanned or attached documents for a patient. If you double-click an item, the document will open in native format (e.g. pdf documents open in Adobe, doc in MS Word) if you have the software installed on your computer. You can download the free Adobe Reader software directly from their website: <u>http://get.adobe.com/reader/</u>

| Exams | Other | Or Drawings | Photos | Attachments | Name: Chart#: DOB: Provider: | Sample; Joe E 000001 12/20/1977 Doktor, Ima K |
|-------|-------|----------------|----------|----------------------------|---------------------------------------|--|
| | Гуре | Date | Status | Description | | Provider |
| DRA | WING | 02/23/200 | 08 FINAL | Fundus (Bight Feet Drawing | | Doktor Ima K |

3.3.4.1 Create Encounter

A new Exam Encounter can be created by clicking the Create New Encounter button. The default date will be Today and the default Encounter Template will be used if none is selected.



Click the Help button within the Exam Encounter screens to get more help once you have a new encounter open.

3.3.4.2 Create Rx

To create a new Rx, open the Encounter List by double-clicking the patient name. Then click the <Add New> line at the top of the list:

| | ages Enco | unters | RX's | Reports | Notes | Other | Name: (Chart#:) DOB: Provider:) | Sample, Joe E 000001 12/20/1977 Doktor, Ima K |
|----------|-------------------------|-----------|---------|--------------------|-------------------|-------|---|--|
| Туре | Date | Status | | 0 | escription | | | Provider |
| Add News | | | Double | click to add new f | Encounter or Not | e | | |
| exam 👘 | \$ 03/10/200 | 8 PENDING | 743,48 | Congenital Anom | alies Of Anterior | Chamb | per, Combi. | Doktor, Ima K |
| RX 1 | 03/10/200 | 8 PENDING | Med R: | x (Tobradex) | | | | Doktor, Ima K |
| NOTE | 02/27/2008 FINAL | | Consult | Report | | | | Doktor, Ima K |
| DRAWING | RAWING 02/23/2008 FINAL | | Fundus | (Right Eye) Drawi | ng | | | Doktor, Ima K |
| RΧ | 02/12/2008 PENDING | | Specta | cle Rx | | | | Doktor, Ima K |
| BX | 02/12/200 | 8 PENDING | CLRx (A | AV Adv for Astial | | | | Doktor, Ima K |

The Choose Type of Item screen will appear. Click the "Create a new Rx" button.

| Create a new ENCOUNTER | Create a new REPORT | SCAN document | INSTRUCTIONS: Click on a button to create a new Encounter, Report or Note. |
|---------------------------|------------------------|------------------------|---|
| R Create a new | Create a new NOTE | Cancel "Create New" | |
| U | | ι. | |

Choose the type of item to be created;

The Multiple Rx Creator tool will display. With this tool you can add up to 4 new Rx's at a time. To begin with a brand new Rx, click one of the "New" buttons on the topmost Rx box:

4

| Multiple Rx's | |
|---|--|
| Multiple Rx Creator | |
| | |
| INSTRUCTIONS: Use the "New" button to e file. You may enter up to four (4) different pre | anter a new prescription OR the green arrow to copy an existing prescription on scriptions. |
| Me | Omit? 🔽 |
| New Med P | |
| New Spec Fill | |
| New CLOX 182 | |
| | |
| a las and states and a las | Omit? 🔽 |
| New Med Rx | |
| New Spec Hx | |
| | |
| | Omi? 🗭 |
| New Med Rx | 121 |
| New Spec Rx | |
| New CLRx 🔁 | |
| | |
| 191 | |
| | Onal? 🕅 |
| New Med Hx | × |
| New CLBx | |
| | |
| | |
| GUAR | R Free ePrescribing |
| Martin | |

NOTE: If you have already entered a prescription that you wish to re-use, the click the green arrow button to call up the LogBook so you can import the Rx. You will be prompted to save Rx's to the LogBook when closing the Multiple Rx Tool.

Medication Rx

The New Med Rx button will display the Quick Medication Prescribe screen. To begin you must select a medication from the top dropdown screen (or choose one from your Favorite Meds list):

| VICE REPORT | E TO SELECT SI | D | | | T Doubard | 1537. | TIMOLOL MALEATE (Twold/Malente EQ.0 |
|---------------|------------------|------------------------|------------------|--------------------|----------------------------------|-------|---|
| CONDEL CLOC | C HZ SELECT SI | There are | | DATATI KOLUUU | A Contraty of | A | |
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| ÷. | Demes 🖉 | Common 3 | S Latter S | F anti add. | (i) (i) (ii) | 8 | Fermile SIG3 Studiescict to select) Fra |
| a (condition) | 1 | | | r 💽 Size 🗌 | - Reith (0 | - | READ AND FOLLOW MANUFACTURER'S |
| Service Sig | <u> </u> | | | 0. 1993 (V) | | | CHEW OR SWALLOW I TABLET DAILY. |
| | | | | | | | |

Enter your Sig by using the list choices or use your Favorite Sig. Verify the data in the Preview Box and then click **Continue** to add to the Multiple Rx list.

Spectacle Rx

Enter ophthalmic prescriptions by using the slider bars on the Spectacle Rx tool.

| Rx Wizard | |
|---|---|
| Spectacle Rs Use the sider bars on the tool below to create the spectacle R buttoms to make free adjustments (ngH, left or certer). | tx (in either plus or minus cylinder). You may also slick the power |
| Spectacle Rx Tool | Customize |
| | Recommendations |
| OD Plano sph OS plano sph plano sph o Sph | Favorites Second State State Second State |
| | < geol Ment > Cancel |

Contact Lens Rx

Enter a contact lens prescriptions by clicking the Brand from the right-side dropdown lists, then using the slider bars to enter the correct diopter power.

| Contact Lens Rs Use the sider bass on the tool below to create the consoct len power buttons to make fine adjustments (right, left or cester) | a Re (in either p | ive or minus cylinder). Yo | u may also (| itck the |
|--|-------------------|----------------------------|--------------|---------------------------|
| Contact Rx Tool | | | | Customize |
| | Reset | 00 | | 05 1 |
| OD C OS | Biand | Vistation Activus Darys | C Vistak | on Acuvue Dasys |
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| -2.25 -2.75 | Diameter | 14.0 | 14.0 | |
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| i i i i i i i i i i i i i i i i i i i | Cylinder | | | |
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| | Add Power | | | |
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| .001 030 945 960 090 120 135 150 100 | 020 | | | |
| 0.80 0.00 | PC | | | |
| +1.00 +2.00 +3.00 +4.00 | ET | | | |
| | Edge | - | | |
| Convert to spherical equivalent & vertex: 001 05 | Ellecid | | | |
| Toric rounding, including verticing OD OS | Dot | | | |
| | Other | | | |

Printing the Rx

Click the Print Preview button at the bottom to begin the process of printing the Rx.

| ${R \over R}$ Free ePrescribing | Print Preview | Close |
|---------------------------------|---------------|-------|
| | | |

The Rx Printing Options screen displays. With this tool you can customize your Rx to the type of paper you are using (whether 2 or 4-part Rx paper) or just plain paper. You can also customize what information appears on the Rx. The font of the body of the Rx can also be adjusted. Any changes you make will be remembered for next time as the default (on the computer you make the changes on only).

| Joe E. Sample | Provide | er Smith Joe R |
|--|--|--|
| e: 2 /15/2011 🛨 Expirat | ion Date: 2 /15/2012 💌 @ | One year C Two year |
| Cayout | Page margins Iop: 0.35 inch Left: 0.35 inch Bottom: 0.35 inch Bight: 0.35 inch | Prescription Options ✓ Include expiration date ✓ Include patient address on Rx ✓ Include NPI# on prescription ✓ Include DEA# on prescription ✓ Include State Lic# on prescription |
| C One-Half Page C Custom Size: 5-1/2" w x 4-1/4" h | Paper size Letter Width: 8.50 inch Height: 11.00 inch | Rx Font Font Name: Arial Font Size: 10 Change Default Font |

Clicking **Continue** will display the actual Rx as it will appear. Once you print the Rx, click Close and you will be prompted to save a copy as an editable Report. If you do, the Rx will show up in the <u>Encounter List</u>.



3.3.4.3 Create a Report

Use the Report Builder wizard to create new reports and letters. Rx's can also be built this way (which allows for more customization, however you are limited to one Rx per page this way).



3.3.4.3.1 Using the Report Writer

Overview

This section of the manual explains how to use various commands to make your reports more legible and attractive.

Basic Text Editing

Navigating the report

You may already be familiar with functions of the standard cursor keys for finding your way around reports, particularly if they extend over more than a single screen. These commands are similar to those used by many word processors, particularly Microsoft Word.

Highlighting text

Wherever in the **Reports** window you happen to be working is where the *focus* is. Selecting an item means to highlight it to let you know it has been selected.

60

Insert and overtype modes

Just as in other word processors, whether you insert text or overwrite existing text depends on whether you are in Insert or Overtype mode, as displayed on the Status bar at the bottom of Report Writer main window.

Replacing text

When you need to replace text, simply highlight the part to be replaced, then immediately type the replacement text without needing to press **Delete**.

Deleting text

Press the **Delete** key to delete a selected block of text, or use the **Delete** or **Backspace** keys to delete one character at a time.

Undo and Redo

Pressing **Ctrl+Z** immediately you change your mind or realize you made an error will undo most report edits including formatting changes, so should always be tried before other methods. Press **Ctrl+Y** to redo the changes. The Report Writer <u>remembers</u> all your edits from the moment you selected the current node (enabling you to press Ctrl+Z successively to backtrack through your edits), but <u>forgets</u> them all as soon as you close the report.

Copying and Moving Text

Having selected (highlighted) the block of text, you have the choice of using the keyboard or mouse to accomplish these aims.

Drag-and-Drop Using the Mouse

Dragging the selected text block and dropping it at its new location is a quick and easy way to <u>move</u> text from one location to another within the same report. You can also use this to <u>break up</u> an report into smaller chunks by dragging and dropping each section where you wish it to be located. You can also <u>copy</u> text from documents in compatible applications such as Microsoft Word to the currently open report.

Cut/Copy/Paste using the keyboard

Having highlighted the block, press **Ctrl+X** to cut it or **Ctrl+C** to copy it, then **Ctrl+V** to paste it within the same or a different report, all using the Windows Clipboard. The target may be in the same report file, another report file that you open, or an open document in a compatible application such as a word processor. Although dragging and dropping is very easy to do, this method offers several advantages:

Using the keyboard to select text may feel more precise. Once text is copied to the Windows Clipboard itcan be pasted into multiple locations, whereas the entire drag-and-drop must be repeated each time.

Formatting Text

Although you can use the same font face, size and color throughout the report, text is much more attractive when headings are more prominent, subparagraphs are indented, etc.

Plain Text and Rich Text

You can add text colors, font faces, sizes and styles such as boldface, and the report is regarded as being in Rich Text Format (RTF). RTF reports can be converted to plain text easily, if desired:

Examples :

This paragraph uses Plain Text alone. All text is the same font face, style, size and color. Boldfacing, italics, underlining, etc. are not used; changing from lower case to UPPER CASE is the only way to make text more prominent.

This paragraph uses *Rich Text*, which allows <u>many more</u> formatting attributes such as **color** to be incorporated. Adding <u>color</u> and images automatically changes the format from plain text to rich text, since both hide extra codes in the report (which the user cannot view).

Report Writer regards its reports as being in rich text format, but you can mix these within a file. Who would want to use plain text when rich text has so much more to offer? Here are two good reasons:

Plain text reports make the ezScriptWriter database much <u>smaller</u>, since there are no hidden formatting characters. This can make quite a difference when you have thousands of reports. You are not faced with the extra chore of <u>reformatting</u> to match the format of the rest of the report text if you copy and paste in plain text.

Note also that plain text reports cannot contain images, underlined hyperlinks, tables, boldfaced or other types of formatting. Converting a rich text report to plain text removes images and table cell borders but leaves the text itself.

Basic formatting commands

Let's concentrate now on rich text. You will find the most frequently used commands (bold, italic, underline, case conversion, font face/size/color/highlight color, etc.) displayed along the **Report formatting** toolbar. Let your mouse cursor hover over each toolbutton in turn to display a tooltip (text popup message) informing you of its function and keyboard shortcut, if there is one. Try them out.

Aligning and Indenting Text

Report Writer offers several methods for indenting and aligning text. Toolbuttons for many of them are on the **Paragraph** toolbar.

Alignment and justification

Click the Left, Right, Justify or Center toolbuttons (or press their corresponding shortcut keys) for text aligned with the left or right margins, both margins or center of the report.

Tab key and Auto Indent

Press the **Tab** key one or more times to indent the text an appropriate distance from the left margin. This is best used for short single lines, since tabbing and auto-indenting only affect the first line of a paragraph.

Bulleted and numbered paragraphs

Text which is bulleted and numbered is automatically indented. Round bullet symbols, numbers and letters are available. Toolbuttons for this are on the Paragraph toolbar.

Enclosing text in table cells

Just as in HTML pages, you can compartmentalize text in individual cells of tables for greater control when combining text and images. These advanced methods are discussed in Tables.

Inserting Items into Your Text

The Insert menu

Frequently-reused text (also known as "boilerplate" text) can be copied to the Windows Clipboard (see <u>Copying and moving text</u>), then pasted in where needed.

Tables

To insert a table where required, click Main menu / Table / Insert command. See the <u>Tables</u> section.

3.3.4.3.1.1 Using Images

Images

Since images may occasionally be required, ezScriptWriter allows you to display images alongside text. Images can flow with the text or be anchored to the page.

To Insert Images

Inserting images is very easy. You can do this by cutting and pasting them from the Windows clipboard, although we recommend that you use the **Insert command** to select the appropriate image(s) from image files already stored on your computer.

| | Text | ABBRE | Report Dispo | tion Si | tore 5 | ign Save at pd |
|------------|-------------------|---------------------|--------------|----------|------------|------------------|
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| | Page Break | filmant and and and | ى گىسىمىڭى، | أستستألب | 18 million | Buudhaa |

Find an image you would like to insert into your report and note its location in Windows Explorer.

Right-click in the report where you would like to insert the image and click *Insert / At Caret Postion* to open the **Insert image into report** window.

Navigate to the folder containing the image, click it to select it and then click **Open** to insert it at the current cursor position.

To Modify Image Properties

To modify the properties of an image, right-click the image to pull up the Image Attributes dialog. The position of the image as well as text wrapping style can be modified. Saving options allow embedding of the image (recommended for small-to-mid sized images) or saving externally (to the same folder as the database). See the <u>Report Designer</u> section for details on saving externally.

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|---|--------------|--------------|--------------------------|
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| Fried Freshort | RC LIERS | 100 | |
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| Absolute Position: | 2.014 | inch | to the left of paragraph |
| | | | |
| Vertical Alignment | | | |
| Vertical Alignment Absolute Position | 0.001 | - inch | below paragraph |

To Delete Images

To delete the image, click it (a border with small square "handles" will appear around it - see below) and press **Delete**. To undo this step, press **Ctrl+Z**.



This shows the border and handles that become visible on single-clicking an image. Reposition the image by dragging it when the border is visible, or re-size it by dragging one of its handles.

Copying, Cutting, Pasting Images

You can copy an image from one report to another, or even from a compatible document such as a Microsoft Word document, via the Windows Clipboard, simply by pressing Ctrl+C, Ctrl+X, or Ctrl+V to Cut, Copy or Paste the image respectively.

Moving, Positioning, and Resizing Images

Images can be **moved** and **repositioned** by dragging them, inserting spaces, tabs or text between them and the left margin, by indenting the left margin, or by enclosing the image in a table cell.

Resizing can be done by dragging the handles, but it is better to do this only to get a rough idea of their ideal size, then use an image editing program to resize them accurately while maintaining their proportion and re-import them.

3.3.4.3.1.2 Using Tables

Overview

Using the Tables toolbar you can create and edit tables. You can also combine and split cells, color cells, color the table, set the table border-width and color, delete and insert table rows and columns. This feature helps you create anything from simple reports to complex forms.

Working with Tables

To Create a Table in Report Writer

Click *Main menu / Table / Insert table*. A dialog box will appear allowing you to choose: the number of **columns** the number of **rows**

This table has 3 rows, 2 columns, center alignment and a border:

| Row 1 Col 1 | Row1 Col 2 |
|-------------|------------|
| Row 2 Col 1 | Row2 Col 2 |
| Row 2 Col 1 | Row3 Col 2 |

The best way to learn about tables is to create tables in various configurations within a test report.

To Alter a Table

Click inside a table in the report, then activate *Main menu / Table*. There are several menu choices, enabling you to alter the following table parameters.

Other methods of altering tables

- Editing text in tables
- Adjusting column width and position

- Moving a column or row
- Inserting and deleting rows and columns
- <u>Splitting and combining cells</u>

The proportional width of a table (as a percentage of the report width) can be altered by using the table properties dialog or by dragging the table-handles in the horizontal report ruler.

You can adjust the width of each column by dragging the dividing partition left or right.

To enter text within a table, position the report cursor in the appropriate cell and begin typing.

If you make a mistake in table creation, deletion or typing, you can generally undo your actions by pressing **Ctrl+Z** or clicking the **Undo** toolbutton.

To delete a table, position the report cursor anywhere within it and click **Main menu / Table / Delete**. You will be asked to confirm your action. You can also delete a table without confirmation by inserting a blank line above and below if not already present, highlighting the whole table, including the two blank lines, and pressing **Del**. Highlighting just the table and pressing **Del** removes all text within the table but not the table itself. As mentioned above, you can <u>restore</u> a deleted table by pressing **Ctrl+Z** or clicking the **Undo** toolbutton.

You cannot easily move, copy , or swap whole columns or rows within a table; you must move each cell individually. For this reason you should design the layout of your table carefully before creating it.

Currently, you cannot create a table within a table.

Editing Text in Tables

Here are some more hints and tips about doing this.

As mentioned previously, text (or images) in one or more cells, rows or columns can be individually aligned (left | right | center) by highlighting it then choosing one of the alignment toolbuttons on the Paragraph toolbar (or via the Edit menu or a keyboard shortcut). Centering text and right-justifying dollars and cents can be very effective.

If you choose left or right alignment, the text will be hard up against the wall of the table, as cell padding is not provided. One workaround is to create extra hidden columns to act as margins. For example:

| Те | ext hard up against left margin |
|----|---------------------------------|
| | |
| | Add a dummy column |
| | |
| | Then hide its border |
| | Inen nide its border |

To hide the border, click anywhere in the cell with text, then click the Show left border toolbutton on the Table toolbar to disable it. This will be discussed more fully later. You can drag the Table toolbar off the Toolbars area, making it "float" closer to where you are working.

You can treat text in tables as you would anywhere else in an report. You can cut, copy and paste it.

You can select (highlight) a whole row or column by performing one of the following actions:

- ? Click-dragging the mouse cursor over it; or
- ? Combining the **Shift** key with the **cursor** (arrow) keys to select multiple cells just like increasing the size of a highlighted section of text; or
- ? Clicking in one cell and selecting the **Select table row** or **Select table column** command from **Main menu / Table**, or choosing the appropriate **Table toolbar** toolbutton.

Having highlighted these cells you can apply boldface, italics or color changes to the text or background.

Adjusting Column Width and Position

You can adjust the width and position of any column by dragging the internal vertical partitions left or right. When your mouse cursor passes over a partition, the cursor will change to a pair of vertical bars with arrows:



You cannot drag the horizontal partitions up or down, but you can add extra spaces to the entries in a row, or add a blank row or column.

You may need to adjust the partitions after deleting a column.

Navigating Within a Table

Think of a table as being a block of text that happens to contain vertical and horizontal lines. Use the **Tab** and arrow cursor keys if you don't want to keep reaching for the mouse all the time. To jump from cell to cell, left to right along a row and top to bottom, press the **Tab** key. To go in the reverse direction, press **Shift+Tab**.

The Right arrow key follows the same direction as the Tab key but stops at each character. Similarly, the Left arrow key follows the Shift+Tab key. The Up and Down arrow keys move up and down columns. Note that if you start from outside a table, the Down arrow key will move down the leftmost column and the Up arrow key will move up the rightmost column.

Moving Text, Columns, and Tables

To Move and Copy Text from Cell to Cell

The destination cell need not be an adjacent cell. You can move text anywhere within the table.

Alternatively, you can copy or cut a highlighted block to the Windows Clipboard and paste it in. This can be handy if you need to paste the same text into several cells.

- 1. Highlight the entire contents of a cell using the cursor keys or the mouse
- 2. Drag the highlighted block to the destination cell.

NOTE: If the destination cell is not empty you can use this method to insert the block into existing text.

To Move a Column or Row

You can only move one cell at a time using the method described in <u>Moving and copying text from</u> <u>cell to cell</u>; you cannot move a whole column or row. For this reason, you should plan your layout carefully before creating the table. However, you can achieve the same end by <u>inserting a new row</u> <u>or column</u> in the destination position, dragging the contents of each cell in the original row or column across to it, then deleting the original.

You can also copy one <u>or more</u> highlighted rows and paste them as separate tables, rearrange them vertically to form a new sequence and then join them. See <u>Moving and copying tables</u>.

To Move and Copy Tables

Whole tables, including contents, can be cut, copied and pasted, just like any other blocks of highlighted text, to and from the Windows Clipboard. They cannot be dragged. You can also <u>copy</u> <u>one or more highlighted rows</u> and paste them elsewhere (outside the table) as a separate table. However, pasting them back only replaces existing text corresponding to the number of rows you pasted in. Instead, create the same number of extra rows, then fill them with inserted text. The following example shows you how:

Example: Insert Table 2 into table 1.

| ddddd | aaaaa | Table 1 |
|-------|-------|---------|
| | ddddd | |

| bbbbb | Table 2 |
|-------|---------|
| ccccc | |

Position the report cursor in the top row (aaaaa) of Table 1, then click the **Insert table row** toolbutton twice, to insert two rows.

aaaaa Table 1

ddddd bbbbb Table 2 ccccc

Now, position the report cursor in the top row (bbbbb) of Table 2, and press **Shift+Down** to highlight both of its rows. Press **Ctrl+C** to copy them, then position the cursor on the top blank row in Table 1 and press **Ctrl+V** to paste the text contents.

| aaaaa | Table 1 |
|-------|---------|
| bbbbb | Table 2 |
| CCCCC | |
| ddddd | |
| | |

| bbbbb | Table 2 | | | | | | |
|-------|---------|--|--|--|--|--|--|
| 22222 | | | | | | | |

Finally, delete Table 2 and tidy up. Done!

| aaaaa | Table 1 |
|-------|---------|
| bbbbb | |
| CCCCC | |
| ddddd | |
| | |

Inserting and Deleting Rows and Columns

To Insert a Row or Column

New rows are added below the selected row. New columns are added to the right of the selected column.

To add a row, select the existing row below which you want the new row to appear. by clicking in it.

Then:

Click the Insert table row icon; or

Click Main menu / Table / Insert table row; or

Press the **Tab** key after positioning the cursor in the rightmost cell of the selected row. This will insert a new table row and move the focus to the first cell of the new row. E.g. (the graphics below are images, not tables):

| | - | |
|---|---|--|
| | | |
| - | | |

Before

| 27 | - V2. | 6 |
|--------|-------|---|
| | | |
| | ĵ. | |
| 7 | | |
| | 10 | |
| 2 a.c. | 177 | |

After

Successive clicking will add more blank rows.

To Delete a Row or Column

If you have just inserted one (blank) row or column too many, you can reverse this by clicking **Undo** (**Ctrl+Z**).

Alternatively, to delete a row or column, select it and click the **Delete table row** toolbutton.

If you need to remove a block of consecutive rows within a table, start at the <u>top</u> row to be deleted and keep clicking the **Delete table row** toolbutton until the deletion is completed.

Splitting and Combining Cells

To Horizontal Split and Combine Cells

Splitting and combining cells

You can **split** a cell into two horizontally by adding a partition, or remove it to **combine** two cells into one. Use the **Split table cell** and **Combine table cells** commands in **Main menu / Table** or corresponding **Table toolbar** toolbuttons.

Here is a table, originally 3 rows and 2 columns, which has had **split** and **combine** operations carried out on the second and third rows respectively.

| Cell 1 | Cell 2 | Cell 3 | |
|------------------------|--------|--------|--|
| Cells 1 and 2 combined | | | |

Splitting columns

To split a column of blank cells into two: highlight the whole column then click the **Split table cell** toolbutton.

To Vertical Split and Combine Cells

Vertical splitting relies on showing/hiding the top and bottom borders of adjacent cells.

Let's start with a 4-cell table:

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |

Figure 1

Think of each cell as having four borders, like this:



Figure 2

To avoid grid thickening, either the upper cell's floor or the lower cell's ceiling may be visible, but not both. (Occasionally you may notice a double thickness grid wall but this will disappear when you return to the report after moving to another node or closing the file, so is an artefact.)

| Cell 1 floor visible | Cell 2 | | | |
|-----------------------|--------|--|--|--|
| Cell 3 ceiling hidden | Cell 4 | | | |
| Figure 3 | | | | |

| Cell 1 floor hidden | Cell 2 | | |
|-------------------------------|--------|--|--|
| Cell 3 ceiling visible Cell 4 | | | |
| | | | |

Figure 4

| Cell 1 floor hidden | Cell 2 | | | |
|-----------------------|--------|--|--|--|
| Cell 3 ceiling hidden | Cell 4 | | | |
| Figure 5 | | | | |

Note the misalignment in the floors of Cells 1 and 2 in Figure 3 compared with Figure 4, due to different show/hide selections. If you notice this when creating your own tables, ensure that these parameters match across the whole row.

We have thus "combined" cells 1 and 3, so let's add some blank lines and rename the combination Cell 5:

| Cell 5 | Cell 2 |
|--------|--------|
| | Cell 4 |

Vertical splitting is essentially the reverse of this.

Selecting Rows and Columns

By clicking any cell and then choosing from *Select table row* or *Select table column* in the Table menu or the Table toolbar, you can select the whole row or column that includes that cell.

This command is useful if you wish to change the font attributes, colors, etc. of all cells in the row or column, or to clear the contents of the row or column. You cannot use it to copy, move, swap or delete a row or column.
You can also select a whole column, row or block of cells by click-dragging the mouse pointer or by using **Shift+cursor** keys. See Editing text in tables.

To Select an Entire Table

Clicking anywhere in a table and selecting **Main menu / Table / Select** entire table will immediately select the whole table, which can be very convenient if you wish to change the same property for all cells or to hide/unhide cell borders for the whole table.

Table and Cell Borders

The right-most eight toolbuttons of the Table toolbar determine whether the borders of the cells selected are visible or hidden. Click any cell and see which of these border toolbuttons are depressed. Clicking any of them again reverses their effect.

Fig. 1: Original

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |

This is the original table.

Fig.2: Hide borders

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |

This can be reversed by clicking **Show borders**¹.

Fig.3: Show outer border(s)

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |
| | |

This can can be reversed by clicking Show inner border(s)

Fig.4: Hide borders then Show inner border(s)

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |

This can be reversed by clicking Show borders.

Fig.5: Show left border and Show right border disabled in all cells

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |
| | |

Fig.6: Show top border enabled in lower cells and Show bottom border enabled in upper cells.

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |

Combining these borders results in a thicker line which makes a convenient divider.

Fig.7: Show top border disabled in lower cells and Show bottom border disabled in upper cells.

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |

Fig.8: Show right border enabled in Cell 1 and Show left border enabled in Cell 2. Show right border disabled in Cell 1 and Show left border enabled in Cell 4.

| Cell 1 | Cell 2 |
|--------|--------|
| Cell 3 | Cell 4 |

Cells 3 and 4 display the standard configuration as seen in Fig. 1. You would expect that adding Cell 1's right border would cause a thicker partition, but its only effect is to stagger the existing one towards Cell 1. The only remedy is to disable Cell 1's right border.

If you highlight a block of text and accidentally click any of the Show ... border toolbuttons your paragraph will display a horizontal or vertical line along one of its borders like part of a table. Doing this deliberately is not recommended as such stray table cell wall lines may cause interference with text and prove difficult to remove.

Table and Cell Color

Report Writer gives you full control over table and cell colors. With the **table properties** screens you can set the global table color or individual cell colors, as well as the table border-color and border-width.

Table Hints and Tips

To Insert Images into Tables

Tables are a good way to store images, which can be inserted using the *Main menu / Insert / Image at Caret Position* command. Just like web-pages which owe their neatness to tables with hidden borders, you can hide the table borders once you have finished inserting images. If you wish to display the table frame (also referred to as a grid), you can space the image away from the cell wall by adding a blank line above (press **Enter**), or by adding spaces.

3.3.4.4 Create a Note

You can use the Note Writer to create simple chart notes on a patient. This can be useful for recording telephone messages or brief in-office encounters that don't warrant a full Exam Encounter.

| No | te Writ | ter | | | |
|--------------------|-----------|-------------|-------------|------------|------------------|
| Note fo | r Sample, | Joe E | | Date: 2/15 | /2011 1:19:03 PM |
| Quick Templater | Tel Msg | CLRx Reg | Eye Problem | No Show | SOAP |
| 1 cmpiates. | Walk-in | Consult Rpt | CLIssue | Blank | Customize |
| Text of Note: | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

3.3.4.5 Attach/Scan a Document

There are two ways to get documents into the software: Direct Scan Method and Attach File Method. Both methods create a new folder item in your database folder containing a copy of the document. If you Attach a document, the original document stays in the present location and an exact duplicate is added to the Documents folder. You can browse the Documents folder by opening the database folder and clicking Documents. The documents are arranged by Patient Name (alphabetized), then by category.



<u>WARNING</u>: Do not move, rename or delete files in the Document folder as this will cause the file to become unavailable for browsing/opening in the Encounter List.

Direct Scan Method (requires a TWAIN compatible scanner): Click the Scan Document button after you select <Add New>.



| elect Scanne | r to Use: | |
|--|---|--|
| WIAREOIDTUS | | |
| Device Conf | guration | |
| Image Type: | | |
| | Greyscale 💌 | |
| Resolution (c | pi): | |
| | 100 | |
| Document T | emplate: | |
| | Letter Size 💽 | |
| Layout (Inch | es): | |
| Top: | 0 | |
| Left: | 0 | |
| Right: | 8.5 | |
| Bottom: | 11 | |
| 🗂 Display s | canner's interface first | |
| Top: Left: Right: Bottom: Displays | 0 0 8.5 11 canner's interface first | |

Attach File Method

To Attach a file that already exists (for example, a faxed/emaild pdf document or your own scanned document), click the Attachments button at the bottom of the Encounter List.

| Double click to add new Encounter or Note | |
|---|--------------|
| 743.48 Congenital Anomalies Of Anterior Chamber, Combi Do | oktor, Ima K |
| Med Rx (Tobradex) Do | oktor, Ima K |
| Consult Report Do | oktor, Ima K |
| Fundus (Right Eye) Drawing Do | oktor, Ima K |
| Spectacle Rx Do | oktor, Ima K |
| CLRx (AV Adv for Astig) Do | oktor, Ima K |
| | |
| | |
| | |

On the next screen, click the Add File button to locate the file you wish to Attach.



The document properties page appears and you must enter a category. Then click the browse button to attach the file.

| Add New Atta | chment | |
|-------------------|--|--------|
| Attachment detail | d New Attachment | |
| Saturning detai | •····································· | |
| Category: | Correspondence | |
| File Type: | Text Document | |
| Find File: | | Cert . |
| Attach date: | 2 /15/2011 | Im |
| Description | | |
| Set as Templa | te Okay | Cancel |

3.3.4.6 Rx Logbook

The Prescription Tracking Logbook allows for tracking of all prescriptions created in the software. There are four categories:

- Full Rx List
- Medications
- Spectacles
- Contact Lenses



Double-click an item to select. Use the Expand/Collapse checkbox to show/hide the full prescription.

3.4 Patient Reminders

Patient Reminders allows a method to send messages/reminders to yourself (or others) for specific patients, generally to be acted upon at some future date. For example, if you wish to remind your staff to call a patient in a week to check the status of an eye problem you would create an eReminder and set the send date for one week in the future.

Create/Send a New Reminder Receiving a Reminder Managing Reminders User Groups

| Inbox P eReminder Ma New effeminder Se User Gro | anager x Dette Mig | | | |
|--|-----------------------|---------|-------------------|---------|
| Message Managel | Patient Name | Subject | Action Date | Sent By |
| eReminder inbox Completed & Archived Outbox/Pending Delivery Deleted Items | Adams, Bessie | lest | 7/23/2009 | dpedigo |
| | From : Subject : | Re : | Action Due Date : | |
| | Ϋ́ ID | | | |

3.4.1 Create/Send a New Reminder

To create and send an eReminder, you fill out a form that resembles a standard email. The following fields must be entered:

To Field (REQUIRED)

Enter the user that the email should be sent to (or choose a user group).

Action Date (REQUIRED)

This is the date the eReminder will trigger and appear in the recipients inbox.

Patient (REQUIRED)

The patient that is the subject of the eReminder.

Subject (REQUIRED)

The reason for the eReminder.

Urgency

A flag for the level of urgency.

Mark as Confidential

If you wish to keep the eReminder from being read by anyone but the actual user, you can set a password.

eReminder Body

The text of the reminder (can be formatted by using the richtext controls).

| 🖬 New M | essage |] | | | | | | | × |
|------------|---------|----------|--------------|------------------|-------------------|---------------------|---------------------|-------|-----|
| | eR | emin | der Me | ssag | e E | dite | or | | |
| To: | I | | | Action I | Date : | 3/2 | /2011 | ¥ | |
| Re: | Click | to Selec | t Patient) | Patier | nt ID : | | | | |
| Subject : | | | - 53 | | | 547 | | 16 | |
| Urgency : | Normal | 2 | | ⊢ Mark requir | as cor re pass | nfidenti word to | al (will o open) | | |
| 🚅 <u>S</u> | et Font | B I | <u>u</u> D | X 🗈 | 8 | ĸ | ~ | | |
| | | | | | | | <u>+</u> | | - |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | ì | | Ĩ | | |
| | | | | ? | V | Ok | ay | X Cle | ose |

3.4.2 Receiving a Reminder

When a Reminder is received, there are four options that the user can take:

Mark as Completed

Once you have completed the action required by the Reminder, you can mark it as completed by clicking the appropriate button.

Assign to Another User

To have another user take over the responsibility of the Reminder, use the Assign to Another User button. The Reminder will show up in their inbox.

Reset Due Date

If you need further time to finish the Reminder, simply reset the due date using the Reset Due Date button.

Discard

If you wish to delete this Reminder (for example, it is no longer relevant).

| Mark as Completed 🛛 🛹 Assign to Another User | 🚰 Reset Due Date 🗖 | X Discard |
|--|--------------------|-------------------------------|
|--|--------------------|-------------------------------|

3.4.3 Managing Reminders

The Reminders can be located in four areas:

Inbox

Holds pending Reminders that have not been acted upon.

Completed/Archived

Contains a list of your completed Reminders (those marked as completed by the user).

Outbox/Pending

Those reminders that have not triggered yet (pending) will be listed here (only those of the user who created them).

Deleted Items

Any items that were deleted previously.



3.4.4 User Groups

You can group together users (e.g. "Staff", "part-time doctors", "receptionists") so that Reminders can be sent only to the members of that particular group.



To create a group, click New then enter a unique name for the group. Then click the names of the users to include and use the arrows to transfer to the "Current Members of Group" list.

3.5 Special Functions

The Special Functions menu allows you to perform various housekeeping functions on the database, manage report templates and rolodex names, report bugs and check for updates, and query the database.



Database Maintenance Backup Database Compact Database

Software Maintenance Report Bugs Check for Updates

Data Management Query/Statistics Encrypt/Compress Reports

Miscellaneous Functions Report Designer Rolodex Utility

3.5.1 Database Maintenance

The Database Maintenance menu allows options for maintaining the health of your database.



Backup Database Compact Database

3.5.1.1 Backup Database

Utility to create a compressed backup copy of ezScriptWriter's date files. We recommend that you perform a backup EVERY DAY and save the compressed file on removable media (CD Rom, USB Flash Drive, or another network drive). Store a copy of your database off-site (either using the removable media or an online data storage site). This off-site copy should be replaced weekly (if not daily).

| 쓀 ezHealtl | 1Ware Backup | |
|---------------|--|--|
| | Backup your ezHealthWare databases to compressed (.zip) file and/or CD-ROM | |
| 9 | NOTE: All users must be logged off (on all computers) during the entire time that the backup is in progress. Failure to do so may result in loss of data! | |
| | The backup process may take from several seconds to many minutes, depending on the size of the main database. Please be patient until the process completes. Once the ZIP file has been built, you will have the option of burning it to a CD-ROM disc (only available on newer versions of Windows XP). | |
| Location to s | ave ZIP file (defaults to local directory): | |
| Progress | ackup\ | |
| Backup log: | | you don't want to |
| Waiting to b | Use the same location and remember where you save the backup files (in case you need to restore). We recommend using the default name on your external drive (e.g. "E.\ezHW_Backup"). | backup scanned documents. Leaving this box checked may add a significant amount of time to the backup. |
| V Include 1 | Backup Burn CD Disc | |

You can do two types of backup's:

With attached/scanned documents included

If you leave the "Include Documents Folder" checked, the software will compare the existing backup document folder with the current and copy any new documents over. If this is the first time you are backing the documents folder up (or if the location does not have an existing copy to compare against), the process may take much longer than the usual backup.

Without documents

By leaving the checkbox unselected you can do a backup of just the main databases.



WARNING: NEVER save your backup folder to the same directory as the actual database files (e.g.

never use "C:\ezHW_Data\ezHW_Backup" as a backup location). You can use "C:\ezHW_Backup" on the same drive, however if you have a hard-drive crash you will lose both your original database and the backup(s). Instead, backup to an external drive or removable media.

Burn CD Disc

If your computer includes a CD recorder, you can copy files to a writeable disc. This process is called burning a disc. Use the "Burn CD Disc" button to create a CD-ROM with your database files. This utility copies the files to the Windows temporary CD folder. You must complete the process by using the Windows CD Writing Wizard.

The CD Writing Wizard opens and prompts you for a label for the CD (it is pre-filled with the current Backup Date). You can enter up to 16 characters. Click Next and the wizard displays a progress bar indicating the status. If you did not select the Close the wizard after the files have been written check box, then a final dialog box opens, asking if you'd like to make an additional copy of the same files.

Restoring Database Files

Navigate to the folder you originally created to save your backups and open the backup file (it will have a name like "Backup090110xxxx.zip". The numbers are a date/time stamp, so this example would be Sep 1, 2010. Once you have located the most recent backup (usually in the C:\ezHW_Backup folder on your primary computer, but that location may vary), then you need to uncompress (unzip) the file. Right click the file and select "Extract" (or just double click the file; in most versions of Windows this will start the uncompression feature). Once the folder has been extracted, you will see five databases (each end in ". dez" extension).

| Backup 1022100950.xp Backup 1023092003.xp Backup 1025101609.xp Backup 1026091025.xp Backup 1027092118.xp Backup 1027092118.xp | 85,388 KB 63,780 KB 87,655 KB 64,028 KB 10,103 KB | IZArc ZIP Archive IZArc ZIP Archive IZArc ZIP Archive IZArc ZIP Archive IZArc ZIP Archive | 10/22/2010 9:50 AM 10/23/2009 8:04 PM 10/25/2010 4:09 PM 10/25/2009 10:25 AM |
|--|---|--|---|
| Backup 1023092003.xp Backup 102510 1609.xp Backup 102609 1025.xp Backup 10270921 18.xp Backup 10270921 18.xp | 63,780 KB 87,655 KB 64,028 KB 10,103 KB | IZArc ZIP Archive IZArc ZIP Archive IZArc ZIP Archive IZArc ZIP Archive | 10/23/2009 8:04 PM 10/25/2010 4:09 PM 10/26/2009 10:25 AM |
| Backup 1025 10 1609. zp Backup 102609 1025. zp Backup 10270921 18. zp Backup 10270920 15. zp | 87,655 KB 64,028 K8 10,103 KB | IZArc ZIP Archive IZArc ZIP Archive IZArc ZIP Archive | 10/25/2010 4:09 PM 10/26/2009 10:25 AM |
| Badoup 102609 1025.zp Badoup 10270921 18.zp Badoup 10270920 15.zp | 64,028 KB 10,103 KB | 12Arc 21P Archive | 10/26/2009 10:25 AM |
| Backup 1027092118.ap Backup 10300900 15.zp | 10,103 KB | IZArc ZTP Archive | |
| Backup 10300900 16. zp | 122 C 22 C 22 | Construction of the second sec | 10/27/2009 9:18 PM |
| C | 10,135 KB | IZArc ZIP Archive | 10/30/2009 12:15 AM |
| Backsb 1030090025.20 | 64,803 KB | IZArc ZIP Archive | 10/30/2009 12:30 AM |
| Backup 1030091830.zp | 10,151 KB | IZArc ZIP Archive | 10/30/2009 5:31 PM |
| Backup 1031090014.zp | 64,825 KB | IZArc ZIP Archive | 10/31/2009 12:14 AM |
| Backup 1 103 1000 36.zp | 89,523 KB | IZArc ZIP Archive | 11/3/2010 12:39 AM |
| Backup 1104102116.2p | 89,547 108 | IZArc ZIP Archive | 11/4/2010 9:17 PM |
| Backup1105102113.pp | 89,573 KB | IZArc ZIP Archive | 11/5/2010 9:13 PM |
| Backup 1109102119.zp | 89,662.43 | IZArc ZIP Archive | 11/9/2010 10:20 PM |
| Back.p1111100924.zp | 89,709 KB | 12Arc 21P Archive | 11/11/2010 10:25 AM |
| Backup 111609 1952.pp | 64,911/08 | IZArc ZIP Archive | 11/16/2009 8:52 PM |
| Backup 1117101143.2p | 89,709 KB | IZArc ZIP Archive | 11/17/2010 11:43 AM |
| Backup 1118091947.20 | 64,930 KB | IZArc ZIP Archive | 11/18/2009 8:49 PM |
| | Backup 1031090014.pp Backup 103100038.pp Backup 1104102116.pp Backup 1105102113.pp Backup 1109102119.pp Backup 1110910221.pp Backup 1116091952.pp Backup 1116091952.pp Backup 1118091947.pp | Backup1031090014.zp 64,825 KB Backup1031090014.zp 64,825 KB Backup1103100038.zp 89,523 KB Backup1104102116.zp 89,547 KB Backup1105102113.zp 89,573 KB Backup1109102119.zp 89,562 KB Backup1109102119.zp 89,562 KB Backup111010924.zp 89,709 KB Backup1116091952.zp 64,911 KB Backup1117101143.zp 89,709 KB Backup11118091947.zp 64,930 KB | Backup1031090014.zp 64,825 KB IZArc ZIP Archive Backup1103100038.zp 89,523 KB IZArc ZIP Archive Backup1104102116.zp 89,547 KB IZArc ZIP Archive Backup1105102113.zp 89,573 KB IZArc ZIP Archive Backup1109102119.zp 89,662 KB IZArc ZIP Archive Backup11100924.zp 89,709 KB IZArc ZIP Archive Backup1116091952.cp 64,911 VB IZArc ZIP Archive Backup1116091952.cp 64,911 VB IZArc ZIP Archive Backup1117001143.zp 89,709 KB IZArc ZIP Archive Backup1118091947.zp 64,930 KB IZArc ZIP Archive |

This is the most recent file, since the date stamp is 1118091947 (or Nov 18, 2009 @ 19.47pm

Typically the database file MOST LIKELY TO CRASH is the ezDB.dez file. So you should FIRST copy just that file over from your backup copy and see if the software starts successfully. If you know the exact order you entered patients since the last backup, you can re-enter them in the same order so the exact same Chart# is assigned. This way your ezReports.dez database can still be in sync. If you do not know the exact order, then you should copy the following THREE files to your primary ezHW_Data folder: ezDB.dez, ezReports.dez and ezImages.dez. The computer will ask if you wish to overwrite and you should respond yes. The ezToolData and events.dez files are not likely to crash and should only be

copied if they do not currently exist in your ezHW_Data folder (be sure to check, because you will get errors if they are not there!).



WARNING: If you are restoring the database files from a utility other than ezBackup (for example, a utility you run every night to backup the entire hard-drive) you need to take extra precautions to ensure you do not accidentally overwrite good data with outdated files. If your backup software does incremental backups, you may only have ONE copy of the database to roll back to (and if it's corrupted you are out of luck). So, if you are using third-party backup, we still recommend that you use the ezBackup utility to create dated, compressed copies of your database nightly.

3.5.1.2 Compact Database

Utility to compress (compact) the database and sometimes repair minor data errors. We recommend you run the Compact/Repair utility about once a week to keep your data files in good condition. It's HIGHLY RECOMMENDED to run the Backup utility before the Compact Utility.

The Compact Utility will automatically close the software on the current computer, but you MUST close out the software on any other computers on the network. This includes all modules (ezClaimBiller and ezApptScheduler).

| 🔑 ezDB Dat | abase Mainta | inance | |
|------------|---|---|--|
| | The ezHealthw compacting to overall speed o database INSTRUCTION (including ezCh ezScriptWriter) same folder tha | vare database requires occas minimize the size. It also incr of the program by improving a NS: Close all ezHealthWare s hartWriter, ezClaimWriter and on all computers and run this at the main database resides. | ional eases the ccess to the software utility in the |
| | | Compact Database Now | Cancel |

3.5.2 Software Mantenance

Use these menu items to look for software updates or send bug reports.

| Report a Bug |
|---------------|
| Check Updates |

Report Bugs Check for Updates

3.5.2.1 Report Bugs

If you encounter a persistent error or glitch (programmers call them "bugs"), you can upload or fax a report to us so that the issue may be resolved. Simply follow the on-screen instructions to generate the bug report.

| Report bug |
|--|
| EzHealthWare Report a Bug Wizard |
| To help us diagnose this error and improve our software, please answer the following few questions. Provide as much details as possible. |
| Product name:)ChartModule |
| Product version: 4.1.1 |
| System information: Operating System: Windows XP Version 5.1.2600 Service Pack 3 5.1 (Build 2600) CPU: Intel Pentium 32-bit |
| Total Physical Memory: 2,095,480K Available Physical Memory: 709,052K |
| Close |

Bug reports are reviewed periodically to look for patterns and complete software crashes. If you have specific concerns you would like addressed, please submit the Bug Report with the error information and send an email to Tech Support with your concern. Bug Reports will not normally be answered on an individual basis.

3.5.2.2 Check for Updates

Occasionally you will notice that an Alert will appear at the bottom of the ezScriptWriter Login screen alerting you that an update to the software is available (assuming you have Internet connection for this check to occur):



A software update is available. You can download from the website at www.ezchartwriter.com or use the Auto Update button. Details

This utility checks the Internet site for any updates to the software. If a newer version is found it is

automatically downloaded and installed. You should run this utility every few months or when notified by ezScriptWriter Support Team of a new release.

3.5.3 Data Management

The Data Management menu allows for creating queries of the database (to find all patients with certain attributes) and to encrypt/compress reports.

| - | |
|---|------------------|
| Þ | Query/Statistics |
| | Encrypt Reports |

Query/Statistics Encrypt/Compress Reports

3.5.3.1 Query/Statistics

The QueryBuilder tool allows for mining of the database for specific search criteria. For example, to find all patients with a diagnosis code of "367.1", the steps below should be followed:

(1) click the Encounter List option (since diagnosis codes are associated with Encounters, not Patients)

(2) in the Field Name dropdown, select the DIAG1 field

(3) choose "is" as the operator (e.g. an exact match, so that ONLY the diagnosis is found).

(4) enter "367.1" in the search criteria field. This is what we are searching for in the database.

NOTE: To perform a complete search, you should repeat these steps for the other diagnosis fields DIAG2-DIAG4.

| Field Name | | Operator | | Criteria | And | /Or |
|---|--|-----------------------------------|----------------------------|---|---|----------|
| DIAGT | ✓ Is | ~ | 367.1 | | And | × |
| | | 0.00 | | | And | - |
| | | | | | And | |
| | | | | | And | |
| | | | | | And | |
| | | | | | And | |
| | | | | | And | |
| | | | | | And | |
| | | | | | And | |
| Select Database to | o Search: | C Patient | List (| Encounter Lis | t 🛛 🔞 Run Que | ry |
| This simple tool all occurances of sele DIAG1) of 367.1 (| ows you to bu ected critería. myopia). | ld a valid data For example, y | ibase query iou can que | so that you can get ry the number of pat | an accurate count of the ients with a diagnosis co | e ide |

The Query Results screen will display. When working with encounters, the name can be double-clicked to open the Encounter.

| # | Last Name | First Name | Encounter Date | ^ |
|-------------------|-----------|------------|----------------|-----|
| 1 | Douglas | Danita | 08/15/2008 | |
| 2 | Nassuk | Jamie | 08/15/2008 | |
| 3 | Nanouk | Chad | 08/15/2008 | |
| 4 | Nanouk | Nina | 08/15/2008 | |
| 5 | Nassuk | Jolene | 08/15/2008 | |
| 6 | Charles | Leo | 08/15/2008 | |
| 7 | Nanouk | Drew | 08/15/2008 | |
| 8 | Charles | Lucille | 08/15/2008 | |
| 9 | Henry | Evett | 08/15/2008 | |
| 10. | Anasogak | David | 08/15/2008 | |
| 11 | Charles | Arlene | 08/15/2008 | |
| 12 | Nanouk | Gary | 08/15/2008 | |
| 13 | Dewey | Randall | 08/16/2008 | |
| 14 | Dewey | Joshua | 08/16/2008 | |
| 15. | Dewey | Jeanae | 08/16/2008 | |
| 16 | Adams | Doris | 08/16/2008 | ~ |
| <u>io</u> ount | 1552 | D'018 | | ose |

Query Results (double-click to open encounter)

Enter Query Criteria:

Operator Choices:

"Is" - exact match "Is Not" - does not match "Contains" - the field contains the criteria "Starts With" - the field begins with the criteria "Ends With" - the field ends with the criteria

3.5.3.2 Encrypt/Compress Reports

To conserve space and/or to fully protect your database from prying eyes you can run the Encrypt/ Compress Reports utility. It converts the text-based report to a encrypted format that saves space and cannot be decoded outside the software itself.



<u>WARNING</u>: If you notice your ezReports.dez database growing close to the 1GB size you should run this utility.

3.5.4 Miscellaneous Functions

The Miscellaneous Functions menu allows you to open the Report Designer and Rolodex Utility.

| scellaneous F | unctions |
|---------------|-----------------|
| | Report Designer |
| 1 | Rolodex Utility |

Report Designer Rolodex Utility

3.5.4.1 Report Designer

The Report Designer allows creation and editing of the various reports and Rx formats available in ezScriptWriter. When the report template screen finishes loading, you will notice that the reports are listed alphabetically by name and that each has a specific category name associated with the report. You can easily switch between an alphabetized listing of report name or by category by clicking on the heading bar.

| Customize Reports & Letters |
|-----------------------------|
| Manage Drawing Templates |
| Edit Encounter Templates |
| Customize SOAPwriter Editor |
| Options & Settings |

To edit an existing report, click on the name and then click the Edit button (or, alternatively, just double-

click the report name). To create a new report click the New button and a dialog will appear to guide you through creating a new report:

| Choose the Report to Edit | Sort by: 🔎 | Name C Type |
|-------------------------------------|------------|-------------|
| Report Description | Туре | |
| Consultation Request Form | REFERRAL | |
| Contact Lens FAQ | HANDPAT | |
| Contact Lens Follow-Up Agreement | CLFORM | 123 |
| Contact Lens Order Form | CLFORM | |
| Contact Rx (1 vear) | CRX | |
| Contact Rx (1yr EW) | CRX | |
| Contact Rx (1yr without FU) | CRX | |
| Contact Rx (2 year) | CRX | |
| Contact Rx (2 yr Exp) - Grid Format | CRX | |
| Contact Rx (2 yr RGP) | CRX | 122 |
| STIN BOOM STIN | mmkV | 14 |

<u>Step A</u>: Select an appropriate category for the report. If the report does not easily fit one of the predefined categories, use the Misc. Reports category.

<u>Step B</u>: Give the report a unique and descriptive name (for example, "Letter to Patient-Importance of Diabetic Control"). You may also indicate whether this report will be based on a prior report format or blank report. Even if you choose a blank report, you can easily copy and paste data from your favorite word processing program.

| 🔳 Create A | New Report - Wizard | X |
|------------|---|------|
| Step A | Select Report Category: | - |
| StepB | Give the new report a descriptive title: Report Body Type: O Based on previous report: I Blank report | |
| | Select X Canc | :el] |

When the report, whether new or editing an existing report, opens, you will be in the Report Designer mode. The Designer looks and acts just like the regular report viewer with just a few important differences. The first difference is that the data you are working on is a Template from which your other reports are built. As such, the Template needs to be told what data to display.



There are three types of data you can insert into your template:

Static Text

This is text that does not change and will be included in every report of that type. Examples include headings and labels such as "Date of Exam:" and "Report of Findings:". You create static text by simply typing text in the Designer just like a work processor.

Dynamic Text (aka Fields)

These are special codes embedded in your report document that tells ezScriptWriter to insert text appropriate to, for example, a particular patient or provider, each Field has a specific format and looks like this:

Dear [[Name Title]][[Last Name]]:

The word "Dear" and the semi-colon ":" are static text. However, the double-bracketed fields indicate placeholders for data to be inserted, in this case the patients salutation (for example, Mr. or Mrs.) and last name. Using the list of pre-defined Fields, it is possible to generate grammatically correct and fully personalized letters, handouts and miscellaneous reports. Using even more specialized Fields such as [[MedRx]] you can create Rx's for your patients. Many sample templates for various reports, Rx's and letters have been created for you. Simply copy the old report to the new and edit the text and Fields as needed.

| i i | [[DrNameFull]] [[PracticeName]] [[PracticeFullAddress]] Tel [[PracticeTel]] Fax [[PracticeFax]] |
|---|---|
| [[Today Date]] | |
| [[RolodexName]] | |
| [[RolodexClinic]] | |
| [[RolodexAddress]] | |
| [[RolodexCityStateZip]] | |
| RE: [[LastFirstMI]] DOB [[DOB]] | |
| Dear Dr. [[Roiodextvarhe]]. | |
| I recently saw [[FirstName]], a [[Ag As you know, [[he/she]] has a histo the following medications. [[Medic | [e]] year old [[Gender]], for a comprehensive eye examination ory of NIDDM [[He/She]] states that [[he/she]] is currently taking cations Taken]]. |
| | |

Inserting Fields can be done using the dropdown list at the top of the Report Designer. A full list of <u>available fields</u> are listed below.

| Insert I | Field |
|------------------------------------|------------------|
| DESCRIPTION | CODE |
| Date - Today's date | [[Today Date]] 🥮 |
| Date - Today's date + 1 year | [[Today Date+ |
| Date - Today's date + 2 years | [[Today Date+ |
| Date - Last exam | [[Last Exam]] |
| Date - Last exam + 1 year | [[Last Exam+1 |
| Date - Last exam + 2 years | [[Last Exam+2 |
| Date - REQUEST date from user | [[Request Dat |
| Patient - Name (Full, First Last) | [[FirstLastNam |
| Patient - Name (Full, Last, First) | [[LastFirstMI]] |
| Patient - Name (First only) | [[FirstName]] |
| Patient - Name (Last only) | [[LastName]] |
| Patient - Salutation | [[NameTitle]] |

Images

In addition addition to static text and FIELDS, you may also insert static images in your documents. These may be logos or signature blocks or any other image you desire.



WARNING: Images consume lots of disc space and if you embed a large image in a report, then each and every report you save will have a copy of that image saved to the database. It is recommended that you limit embedded images to small (under 10K) size. Examples would be a signature block. Typically, images that are embedded should be in ".jpg" or similar format, since they are highly compressed.

To modify the properties of an image, right-click the image to pull up the Image Attributes dialog:

| Image Attributes | × |
|--|---|
| Layout and Position Size and Distance Saving Options | |
| Wrapping Style | |
| | |
| In Line with Text Top and Bottom Square | |
| Position Style: | |
| Move object with text | |
| C Flored Position on Page | |
| Horizontal Alignment: | |
| C Left C Cepter C Right C Other Position | |
| Absolute Position: 2014 inch to the left of paragraph | |
| Vertical Alignment: | |
| Absolute Position: 0.001 - inch below paragraph | |
| OK Cancel | 1 |

When saving the image there are three ways of doing so:

| aving Style: | | | | | |
|--|-------------|----------|----------|--------|----------|
| Embed data in docu | iment | | | | |
| Embed original file r | eference | | | | |
| Export image and e | mbed file n | eference | | | |
| ile name and type: | | | | | |
| ile name: | Docum | ents and | Settings | Develu | ty Docur |
| ave as type: | | | | | • |
| aving Options: | | | | | |
| Resolution: | 96 | - | dpi | | |
| Compression Quality: | 100 | - | % | | |
| | | | | | |
| | | | | | |

Embed data in document

This is the simplest way, but can quickly fill up your report database. Only use very small, low resolution images with this method. To convert and resize your image, use a product like Snaglt (<u>www.techsmith.</u> <u>com</u>) to reduce the resolution. If you embed too large an image you will receive a warning when attempting to save.

Embed original file reference

This is the best way to incorporate larger image files; the image is save seperately from the document and is displayed only when you open the document. The drawback is that the image must be stored in the database folder on the network. So create a subfolder in the C:\ezHW_Data folder called "Embedded Images" and then add your images to that folder (for instance signature stamps or practice logo). To insert the image, click the menu item **Insert->Image->Move with Text** in the Report Designer:

| Text | t ders/Ecotrotes | 8 | ra 🐴 🔲 🖬 🕬 |
|------|---------------------|---|----------------|
| Imag | je | • | Move with text |
| Obje | ect | Þ | Fixed location |
| Page | = Break | | - |

When the Insert Image dialog shows, navigate to your network database folder. Click on the image you wish to embed and click open. When you save the document, a link to this path to the image is saved. When you create a report this same path is maintained.

| Insert Image | | | | | ? 🛛 |
|--|--|----------------------|---|------------|----------------|
| Look in: My Recent Documents Desktop My Documents My Computer | Claims Documents Embedded tm Photos | | | | |
| My Network Places | File name: Files of type: | Windows Bitmap(,BMP) | 1 | • [•] | Open Cancel |

For more information on editing text and adding tables, see the <u>Report Writer</u> section of this manual.

3.5.4.1.1 Available Fields

This is a list of all Codes that can be inserted into Reports/Handouts/Rx's. Use the Report Designer to insert codes (some may not be in the dropdown menu, but you can manually enter them into the report).

| Insert Field | |
|-----------------------------------|------------------|
| DESCRIPTION | CODE |
| Date - Today's date | [[Today Date]] 🤤 |
| Date - Today's date + 1 year | [[Today Date+ |
| Date - Today's date + 2 years | [[Today Date+ |
| Date - Last exam | [[Last Exam]] |
| Date - Last exam + 1 year | [[Last Exam+1 |
| Date - Last exam + 2 years | [[Last Exam+2 |
| Date - REQUEST date from user | [[Request Dat |
| Patient - Name (Full, First Last) | [[FirstLastNam |
| Patient - Name (Full, Last First) | [[LastFirstMI]] |
| Patient - Name (First) | [[FirstName]] |
| Patient - Name (Initial) | [[Initial]] |
| Patient - Name (Last) | [[LastName]] |

[[Rx Date]] [[Rx Date+1]] [[Rx Date+2]] [[Today Date]] [[Today Date+1 [[Today Date+2]] [[Last Exam]] [[Last Exam+1 [[Last Exam+2]] [[Enc Date]] [[Enc Date+1]] [[Enc Date+2]]

[[Request Date]] Prompts user to enter a Date [[Consult Reason]] Prompts to enter a Consult Reason [[RolodexName]] Prompts to select from the Rolodex [[RolodexNameDegree]] [[RolodexFirstName]] [[RolodexLastName]] [[RolodexInitial]] [[RolodexSpecialty]] [[RolodexDegree]] [[RolodexClinic]] [[RolodexAddress]] [[RolodexCityStateZip]] [[RolodexTel]] [[RolodexFax]] [[RolodexNotes]] [[RolodexEmail]] [[RolodexUPIN]] [[RolodexNPI]] [[RolodexFullAddress]]

PATIENT INFORMATION

[[FirstLastName]] [[LastFirstMI]] [[FirstName]] [[Initial]] [[LastName]] [[NameTitle]] [[Suffix]] [[Age]] [[DOB]] [[Home Tel]] [[Day Tel]] [[Email]]

[[Primary Ins]] [[UCPrimary Ins]] [[Primary InsID]] [[Guarantor]] [[Primary InsGrp]] [[Primary Auth#]] [[GuarantorDOB]] [[GuarantorGender]]

[[Secondary Ins]] [[UCSecondary Ins]] [[Secondary InsID]] [[Secondary InsGrp]] [[Secondary Auth#]] [[SecondarySubscriber]] [[SecondaryDOB]] [[SecondaryGender]] [[Nickname]] [[Employer]] [[Occupation]] [[Chart#]] [[UCFirstLastName]] UC means Uppercase [[UCLastFirstMI [[UCFirstName]] [[UCLastName]] [[UCNameTitle]] [[UCSuffix]] [[UCPrimary Ins]] Patient.Race [[R]] [[G]] [[UCgender]] [[Gender]] [[He/She]] [[he/she [[His/Her]] [[his/her]] [[Him/Her]] [[him/her]] [[PatFullAddress]] Multi-line address [[PatAddress1]] [[PatAddress2]] [[PatCity]] [[PatState]] [[PatPostalCode]] [[CustomName#1]] [[CustomValue#1]] [[CustomName#2]] [[CustomValue#2]] [[CustomName#3]] [[CustomValue#3]] [[CustomName#4]] [[CustomValue#4]] [[CustomName#5]] [[CustomValue#5]] [[CustomName#6]] [[CustomValue#6]]

PROVIDER/PRACTICE INFO

[[DrNameFull]] [[PracticeName]] [[ProviderFirst]] [[ProviderLast]] [[ProviderMI]] [[UCDrNameFull]] [[UCPracticeName]] [[UCProviderFirst]] [[UCProviderLast]] [[UCProviderMI]] [[PracticeTel]] [[PracticeFax]] [[PracticeEmail]] [[PracticeWeb]] [[PracticeAddress1]] [[PracticeAddress2]] [[PracticeCity]] [[PracticeState]] [[PracticeZIP]] [[PracCityStateZip]][[PracticeFullAddress]] [[GroupTIN]] [[GroupMedicare]] [[ProviderLic]] [[ProviderDEA]] [[ProviderDegree]] [[ProvNPI]] [[GroupTIN]] [[GroupNPI]] [[GroupMedicare]] [[ProviderLic]] [[ProviderDEA]] [[ProvNPI]] [[ProviderDegree]] [[Final SRx]] [[sphOD]] [[cyIOD]] [[axOD]] [[addOD]] [[addOD]] [[prismOD]] [[prismOD]] [[sphOS]] [[cyIOS]] [[axOS]] [[addOS]] [[addOS]] [[prismOS]] [[prismOS]] [[SRxNote]] [[SRxRecommend]]

| | How | Do | 1? | 101 |
|--|-----|----|----|-----|
|--|-----|----|----|-----|

[[Final SRx]] [[SpecRx]]

[[CLBrandOD]] [[CLBCOD]] [[CLsphOD]] [[CLcyIOD]] [[CLaxOD]] [[CLDIAOD]] [[CLparametersOD]] [[CLBrandOS]] [[CLBCOS]] [[CLsphOS]] [[CLcyIOS]] [[CLaxOS]] [[CLDIAOS]] [[CLparametersOS]] [[CLinstructions]] [[CLRx]] [[Final CLRx]]

[[Med Rx]]

FOR USE BY THE SOFTWARE (DO NOT ADD/REMOVE) [[SRxTool]] [[CLRxTool]] [[MedRxTool]]

3.5.4.2 Rolodex Utility

Allows managing of all your healthcare provider contacts (for example, consultants, PCP's, specialists and others). The Rolodex is automatically launched when reports include the Rolodex Field (for example, when writing a letter to a patient's PCP). You can add or modify existing entries simply by clicking the action buttons at the bottom of the screen.

Consultants - Doctors/providers to whom you refer patients PCP - Primary care providers Specialists - specialty medical providers (e.g. neurologists) Facility - nursing homes or skilled health care facilities Other - others that do not readily fit in the above categories

| All Consultant PCP Specialist Facility | Other | |
|---|----------------------------|---|
| LastName FirstName Elinic hung Paul PCLI | E Special E Special Editor | |
| Pedigo David OD | Last Name Initial | |
| | Title Degice | 1 |
| | Сінкс | 3 |
| | Address | |
| | Address | - |
| | State 70 | |
| | Tel | - |
| | Fax | - |
| | Email | |
| | NPI | |
| | UPIN | - |
| | Specialty | 3 |
| | Notes | |

3.6 Recall Wizard

The Recall Wizard allows you to create and send recall notices to your patients. The tool is powerful enough to create specific patient lists for exporting also.

| 🦉 Billing Module | Appt Scheduler |
|------------------|------------------|
| Recall Wizard | Import/Export |
| Special Function | Program Settings |

3.6.1 Creating a Recall List

Creating a Recall List is a three step process as shown on the Wizard:



Step 1 - Choose Patients for Inclusion

To begin the Recall process you need to select the Date Range:

Exam Date - selection is by the last exam date on file
 Recall Date - selection is by the Recall Date you set (either when finalizing an encounter or on the HIPAA tab of the patient demographics screen)

Acquisition Date - selection is based on when the patient was originally acquired by the practice (date the patient was first entered in the system)

Select the date range that would encompass all the patients you are attempting to Recall. For example, you can select a one month period for the current month using the Recall Date option.

| | Select Date Range | | | |
|--|---------------------------------------|--|-----------------------------|------|
| STEP 1 | C Exam Date Range | 3/1/201 | 0 💽 To 🛛 3 /31/201 | 10 💽 |
| elect the date | Recall Date Range | 3/1/201 | 1 💽 ^T o 3/31/201 | 1 💌 |
| iteria to find the atients to contact. | Original Acquire Date Ra | nge 3/1/200 | 1 💽 ^{To} 3/31/201 | 1 |
| atient Selection Criteria | | | | |
| | 1 To 99 | Provider | ALL | 1 |
| Patient Age | · · · · · · · · · · · · · · · · · · · | | TALL. | |
| ✓ Patient Age ✓ Patient Gender | C Male C Female 💿 Both | Employer | ALL | 1000 |
| Patient Age Patient Gender Primary Insurance | ⊂ Male ⊂ Female ● Both ALL | Employer | ALL | |
| Patient Age Patient Gender Primary Insurance City | C Male C Female © Both ALL ALL | ✓ Employer ✓ Source ✓ Occupation | ALL ALL ALL | |

The patient selection criteria allow you to further refine your Recall List by specifying certain required attributes (for example, all female patients over the age of 40). This can be useful for marketing outside the standard recall system.

Step 2 - Review the List of Patients

After clicking the green next arrow, a list of patients found will be presented. This list can be further refined and sorted.

| - Sort By | | Sort Order |
|------------------------------|-------------|--|
| LastName | O Zipcode | Ascending/increasing |
| O LastExam | O PatientID | O Descending/decreasing |

You have the option of excluding certain categories of patients (such as those marked "inactive" or "bad address").

| Excludes | Advanced S | earch/Sort |
|--|------------|------------|
| Would you like to exclude inactive patients? | | O No |
| Would you like to exclude bad addresses? | ⊙ Yes | O No |

To refine your list even further, click the "Advanced Search/Sort" button. This allows for removal of duplicates from the list (for example, family members at the same address will be consolidated to one mailing). A multi-level sort option is also available.

| E Advanced Sort && | Exclusion Options | | |
|---|--|---|--|
| Additional Selection C Additional Selection C Exclude "inactiv Exclude patient: Consolidate fam | s to your selected patie Criteria re" patients s with "Bad Address" ily groups to single listing ite addresses (address + add | nt group, Iress2 + city + state + zipcode) | |
| Remove duplica Remove duplica Remove duplica Remove duplica Sort Order | ite email ite home telephone ite PrimaryInsuranceID | | |
| Sort By Then By Then By | LastName FirstName Initial | Ascending Ascending Ascending Ascending Ascending | Descending Descending Descending |
| | | | V Okay X Close |

Step 3 - Select the Contact Method

The last step to creating a Recall is to select how you want the data presented (based on how it will be used). This can be one of five methods:

| Create La | bels | | | |
|---------------------------|---------------------|----------------|--|-------------|
| <u>Create Fo</u> | <u>rm Letters</u> | | | |
| Generate | <u>Email List</u> | | | |
| Generate | Phone List | | | |
| Export the | Data | | | |
| · · · | | | | |
| Label Maker | Form Letters | Email Lists | Phone Lists | Export Data |
| Contraction of the second | "Heal Serverses and | - 0.07/1700.00 | (And and a second s | |

3.6.1.1 Create Labels

To create labels for a Recall mailing, click the Labels button. The Select Format dialog will display; choose either sheet (laser or inkjet) or DYMO printer roll. You must have a DYMO printer installed for this option to be available. Single or dual roll LabelWriter® printers are supported.



Using the Sheet Option

If you select the Sheet option you will first need to specify the correct labels. Using the standard Avery® label system numbers, you select the correct label number (e.g. for standard address use 5160 or 5161). You can click on a number to see the size and type. If you cannot find your label, use the New Label button to create a new one.

| 🖹 Label List | | |
|---|--|---|
| Eabels: Avery Stands Labels: 12-294 - Laser Tag 12-295 - Laser Tag 12-296 - Laser Tag 12-297 - Laser Tag 12-297 - Laser Tag 5066 - File Folder 5095 - Name Badge 5096 - Diskette 5097 - Diskette | To Label Information Type: Address Height: 1'' Width: 2.63'' Num. Across: 3 Num. Down: 10 | OK Cancel Details New Label Dielete |
| 5160 - Address 5161 - Address 5162 - Address 5163 - Shipping | Page Size: Letter (8.5 x 11in) | |

After you click OK, the Label Template dialog will show. A list of available templates (some pre-existing, some that you may have created) is displayed. Click on the one you wish to use (typically this would be the Avery 5160 label template to match the standard label) and click Load button.



The Label Layout Wizard will display with your select label layout displaying. You can alter the layout or just click Preview/Print to create your labels.

| P Text Setup for Avery Standard, 5160 (Address) | |
|--|--|
| Labet Fork = Arial, Size 9.75 | Field Selections |
| [FirstName] (LastName) {Address} {Address2; {City}. [State] {Zip} | Field Name (Address) (Address2) (City) (FirstName) (Initial (LastName) (NameTitles) Press: (ENTER) or Double Click Field Name to Insert Printing Information |
| | Start At Row 1 🔂 Col 1 💥 Repeat Each Label 1 time(s) |
| o begin, select a Label Template from the menu or copy the desired fields from the ght side onto the demonstration label. | Number of Labels: 61 Number of Pages: 3 |
| 🔛 View Templates | 'review 🔛 🌺 Print 🛛 🗶 Close |

Add Fields

To add fields you double-click on the Field Selection list on the right side, then position them in the proper location on the label template. Use the Edit->Font menu at the top to set the label font.

Create Template

To create your own custom template, create the label layout you desire. Then select Templates->Save from the menu at the top. Choose a unique name that describes the label layout you created (typically you would want to use the Avery label number to keep things simple).

| Template. | er a descripti | ve name for y | our Label |
|------------|----------------|---------------|-----------|
| NOTE: Sav | ved Label Ta | emplates also | include |
| ront monna | auon. | | |
| | | | |
| | | | |

Using the DYMO LabelWriter® Option

The DYMO label printer makes printing labels very easy. Select the printer from the list (or the closest match). Be sure to do a test print to verify the positioning of your address fields. Then choose the correct roll (on dual systems) to begin the print job.

| {FirstName} {LastName} {Address} {Address2} {City}, {State} {Zip} | Bar Code Location None Above Address Relaw Address |
|---|--|
| winTurbo Printing Select Printer | |
3.6.1.2 Create Form Letters

There are two views in the Form Letters section: Template view and Merged Document view.

Template View

This view allows you to edit the letter template (including a mix of data fields and regular text). To add text formatting (bold, fonts, etc) then create the document in MS Word or Wordpad first, then copy/paste into the template. Click **Template->Save** in the top menu to save your work.



| f5 | |
|--|--|
| | IMA K. DOKTOR, O.D. P.C. |
| | MAIN STREET OPTOMETRIC ASSOCIATES |
| | 1000 14 ⁴⁰ ST NW, SUITE 102 SEATTLE, WA 98007 |
| | Tel (425) 555-5500 Fax (425) 555-5507 |
| 02/20/2010 | |
| {FirstName} ({Address} {Ad (City), {State | LastName} Idress2} } {Zip} |
| Dear (FirstNa | me}: |
| It is time for a office today to | new eye exam. Our records indicate your last exam was on (LastExam). Please call our a schedule an appointment. |
| Sincerely, | |
| ro- | ~ |
| a michael | 128 |

Merged Document

Click the Show Merged Document button to preview what an actual letter will look like.

| Show Template | Show Merged Document | Insert Field | 2 |
|---------------|----------------------|--------------|---|
| | | | |

Use the arrows to navigate through the letters. Click the Print All button to printout the merged letters.

| Show Merged Document Click arrows to navigate patients> | 14 4 |] 1 of 61 |) II | Print All | |
|---|------|-----------|------|-----------|--|
|---|------|-----------|------|-----------|--|

3.6.1.3 Generate Email List

If you wish to generate a list of email addresses (for those patients that have one entered), use this utility. Currently, you must export the list of email addresses to be used by a third-party email service.

| 🖻 Export Patient List 🛛 🔀 |
|--|
| Options for Viewing/Exporting Email List |
| What format would you like the patient list to be generated in? |
| C Microsoft Excel |
| Give your List a descriptive file name (or use the default suggested below). Do not use backslash '\' in the name. |
| File Name: Email_List_Export_201103051434 |
| Would you like add an entry with your email address (useful to validate mass mailings)? |
| ⊙ Yes O No |
| Should column headings be included in saved list? |
| ⊙ Yes O No |
| |
| MailChimp More Details 🕢 🕞 Save 🗶 Close |

You can export to two formats:

Universal CSV Format - this is the standard comma-separated values. Lines in the text file represent rows of a table, and commas in a line separate what are fields in the tables row. The first record in a csv file usually contains column names in each of the fields (make sure the "Should column headings be included" is checked as yes). **Microsoft Excel Format** - output is in Excel 2000 format ("xls" extension). This allows easy opening by Excel or similar spreadsheet programs.

3.6.1.3.1 Using "Mail Chimp"

Mail Chimp (<u>www.mailchimp.com</u>) is a low-cost, high-feature email service that can manage your email campaigns. Currently, they allow up to 2000 names with no charge.



To use Mail Chimp, you must first sign up for a free account. Then, once you are logged in, you can create an email campaign. It's a three step process that the website will work you through.



Step 1 - Create and Import your List

The very first thing you should do is setup a managed list. This is because you can't really create and send an email campaign until you have a list to send it to.







Now that you have a list to send an email to, let's create an email!

Step 3 - Reports

We'll show you how many times you opened and clicked in the test campaign, how many bounces you got, and more.

To download your reports per campaign go to Reports > find the campaign whose reports you want to view > click on the Excel icon to the right of your campaign title.

| | | | dChilipp, you're on pffs | n superhero | 8 | j. |
|-------------------------|-----------------------------------|---|---|---|--|--|
| Dverview | | | | 🖉 open nab | an a | une : |
| | | | • | | | |
| | | MailEnimp V Jun 22 Juni | CKLape Group Labora 1927/Earc | | | |
| move to: Uselect folder | 4) | | | | ~ | |
| | name | | lat. | emails | BOUNCES | export |
| | button issue | | Tempize Teeling | - 1 <u>4</u> | 0 | 34 |
| - | Distribution lance dr.) | event | Template Teeting | | 0. | x |
| | Iverview meve ta: select folio | Averview meves tai select folder == 8 marrie i butten lassae i butten lassae i butten lassae | Nvervitew Settor toto settor | MediDilange, you're de personner de la company de la company de la company de la compa | Nerview in provine on price paper from Servicew | MultiChlange, you're on jothon paper harro Color Averview If open natio If o |

3.6.1.4 Generate Phone List

Phone lists can be either previewed as a list on the screen or exported as a file (for upload to an automated phone blaster service, such as Dial My Calls.

| mat of the Tele | phone Recall Li | st you have created. |
|-----------------|-----------------|--|
| rint Preview | Export List | Cancel |
| | mat of the Tele | mat of the Telephone Recall Li rint Preview Export List |

Preview List

The preview list can be used as a call list. It displays the patient's name, nickname, home and day phone numbers, and the insurance plan (if any).

Export List

The export feature allows exporting of the list of names/phone numbers in either CSV or MS Excel format.

| 🗉 Export Patient List 🛛 🛛 🔀 |
|--|
| Options for Viewing/Exporting Phone List |
| What format would you like the patient list to be generated in? |
| Universal CSV O Microsoft Excel |
| Give your List a descriptive file name (or use the default suggested below). Do not use backslash '\' in the name. |
| File Name: |
| Would you like add an entry for your phone number (useful to validate call blasts)? |
| ⊙ Yes O No |
| Should column headings be included in saved list? |
| ⊙ Yes O No |
| More Details Save Close |

3.6.1.4.1 Using "Dial My Calls"

DialMyCalls (<u>www.dialmycalls.com</u>) lets you send voice or text messages to an entire phone list in seconds. No hardware or equipment to buy - you simply record and send your message out to 2 or 200,000 phone numbers within minutes.



Setting Up A Call

Using the "Setup A Call" tab in the control panel, you can setup a call to a group of people in minutes. Follow the three steps below.

| Step 1: | Step 2: | Step 3: |
|------------------------------------|---------------------------------|---|
| Create a new message to be | Create a list of people you'd | Lastly, you simply select a few |
| played to your callers. Or, if you | like to send your call out to. | call options for this call such as |
| have used the system before | You can send calls to your | the Caller ID display info. Then |
| you can choose from one of your | existing call list(s) or create | choose to send the call right now |
| previously used recordings. | a new one from this step. | or a date & time of your choice. |
| | | And a final of the final of |

Manage Your Contacts

From your My Contacts tab, you can easily add, remove, and modify your call lists. Our call group features make it easy to manage multiple calling lists from one account. lists from one account.



Manage Your Recordings

Recordings are messages or greetings that you create that are played for your call recipients. You can add, modify or delete all your recordings at any time. There are 3 different options for creating recordings:

• Record Over Your Phone

Put in a phone number and our automated system will call you and let you

record your message right over the phone! You can preview and re-record until you're satisfied with your greeting. This is by far our most popular method.

• Upload A MP3 or WAV File

This method is usually the choice of larger companies or people that have professionally recorded messages. Using the web interface, you can upload any MP3 or WAV audio file and use it for the message to be played to your call recipients.

• Use the Text-to-Speech Tool

The Text-to-Speech engine is a voice synthesis tool that will allow you to type a message and have it converted to a digitized male or female voice. This is a great solution when you don't have time to record a message but need to send a call out quickly.



Detailed Call Reports

After your calls have been sent out, you can receive complete breakdowns of your call status. You'll be able to see which calls were picked up, which ones went to voicemail and if there were any numbers with problems, such as invalid or disconnected phone numbers. You can even download your call reports into a spreadsheet.



3.6.1.5 Export Data

The Export Data function is a generic method to get your recall data out of the software into a standard file format (either universal CSV or MS Excel). Typically this method is used to create mailing lists that you send to third-parties such as Click2Mail (an approved USPS partner).

| 🗉 Export Pati | ent List | × |
|---------------------------------|---|---|
| Si | ave and/or Export Recall List | |
| What format | would you like the patient list to be generated in? | |
| • | Universal CSV C Microsoft Excel | |
| Give your List not use backs | a descriptive file name (or use the default suggested below). Do slash '\' in the name. | |
| File N | lame: | |
| Would you like | add an entry with your office address (useful to validate third-party | |
| (1121111307) | ⊙ Yes O No | |
| Should column | t headings be included in saved list? | |
| LENDER AND AN ADDRESS | ⊙ Yes O No | |
| Click | Mail More Details | |

To open the file in Microsoft Excel, double-click the file (in the folder you saved it in) and it will display (if you have Excel installed).

3.6.1.5.1 Using "Click2Mail"

Click2Mail's (<u>www.click2mail.com</u>) "Easy Letter Sender" has simple fill-in forms making it easy, quick, and affordable to send a letter (with or without images) or a picture postcard. So easy, you can jump right in and start your mail piece in minutes. Other more advanced letter types are also available.



All you need is a few basic pieces of information

1. Return address: This is the name and address to which you want the mailpiece returned if it is undeliverable.

2. One or more recipient addresses: Enter one or more names and addresses or choose "Import addresses" to upload a list saved as a CSV file. A list template for use with Microsoft Office Excel is available here and when you choose "Import addresses" on the Recipient address fill-in screen.



Using the default font and size, page one of your letter holds 23 lines of text, or roughly 350 words, while subsequent pages hold 37 lines. Using the text editor, you can choose other fonts and sizes to produce different results. You regulate the number of pages you create by the amount of text you include in the text box. If you add more text than will fit on a page, the next page is automatically generated (10 page maximum). You will see how the pages are divided when you click "Preview".

Fill in your information



3.7 Importing/Exporting Patient Data

Using the Import/Export wizard you can easily import patients from your existing Practice Management or EHR software. Alternatively, you can export patient demographics or reports/Rx's to text/PDF format.



3.7.1 Importing Data



There are two options for Importing Data:

Import Patient Demographics (text file)

C Import OfficeMate Database (demographics only)

(1) Importing from a text (csv, comma separated values) file. This option works with files that you create by exporting to text format from your current software.

(2) Importing directly from an OfficeMate database. This pulls the patient demographics only.

Using the Import Wizard

The Import Wizard helps you quickly and easily populate your new database with existing patients. It is, however, a basic tool. It will import patient demographic information (such as name, address, telephone, DOB, insurance info and other identifiers). The wizard requires the data to be in a standard text format such as CSV (comma-separated values) or tab-deliminated.

The current version of the Import Wizard will not allow you to import EMR or billing information. This type of data is too complex for the Wizard (smart as it may be). If you wish to populate your new database with more detailed information from your current practice management and/or EMR system, please contact Tech Support at support@ezscriptwriter.com for details and pricing on database conversion services.

If you get errors, or have other problems importing your patient data, it may be necessary for us to manually convert your data for you. There will be no charge if we can use your current text-based import file and we are importing only the data that the Wizard would normally handle. Additional fees will apply if your current software cannot generate an Export file or if you need addition and/or custom data imported.

OfficeMate Database Import

Use this utility to import the patients from the OfficeMate database directly into ezScriptWriter. Only the patient demographics will be imported.

| 2 Impo | rt OfficeMate Da | itabase 🛛 🔊 |
|-------------------------|------------------|--------------------------------------|
| 9 9 91 | OfficeMate File: | C:\Program Files\OfficeMate\omate.md |
| | | Import OfficeMate Records |
| Idle | | |
| - | | - |
| | | Exit |

3.7.2 Exporting Data

There are two options for exporting data:

| C | Export Patient Demographics (Excel or Text Format) |
|---|---|
| C | Export Reports/Rx's to PDF or Microsoft Word format |

(1) Export to a text or Excel File. This option allows you to export all patients or just a selected patient. You can also export by Last Exam date. The data exported is basic demographics (name, address, birthdate, etc), although if you use the Advanced button you can select more fields to export (not encounters or reports however).

| xport Details | |
|--|---------------------|
| This version of the Export Wizard only exports basic patient demog | raphic information. |
| Export File Details | |
| Format: 📀 Comma Seperated File (csv) 🦵 Tab-deliminated Tex | Ŋ |
| File Path: C:\Documents and Settings\David\My Documents\ | 111 |
| Click to Select Patient | |
| Start Date: 3/5/2010 End Date: 3/5/2011 | |
| Export Progress: | |
| Advanced Details | Cancel |

(2) Export reports/Rx's to PDF or MS Word (text editable). This can be useful for printing all the documents in a patient's chart (except for the Encounter itself, which are printed from within the encounter).

| Export Report Options | |
|--|------------------|
| Report Export Options Allows exporting of Reports/Rx's to Microsoft Word forma | at |
| Name of Folder to Export Documents C:\Documents and Settings\David\My Documents\ | |
| Additional Selection Criteria Click to Select Patient Click to Select Patient Export reports by PatientID Range Startng PatientID: 1 Ending PatientID: 9 | 99999 |
| Select Format to Export Reports PDF (Adobe Portable Document) RTF (Richtext - MS) | 6 Word Editable) |
| Export Progress: | Next X Cancel |

3.8 **Program Settings**

The Program Settings button allows for customization of ezScriptWriter.



General Settings

| mm/dd/yyyy | Date Preview: 03/05/2011 | |
|---------------------|---|--|
| Date Format to d | isplay on Reports | |
| MM/dd/yyyy | Date Preview: 03/05/2011 | |
| Auto-select pro | wider for reports/Rx's as currently logged user | |
| Auto-select HIP | AA notification for each new patient | |
| Default report to u | se for Record Release: | |
| | | |
| Record Release Re | equest 💌 | |

Date Format for Encounters

Allows customization of the way a date is displayed throughout the software (for example, mm/dd/ yyyy format). You may use one of the three predefined formats or create your own.

Date Format for Rx/Reports

Allows customization of the way a date is printed on reports (for example, mm/dd/yyyy format). You may use one of the three predefined formats or create your own.

Auto-select provider for reports/Rx's as currently logged user

Determines whether the current user is selected as the provider for certain reports/Rx's.

Auto-select HIPAA notification for each new patient

Automatically create a HIPAA notification entry for any new patients. This indicates the patient was provided a copy of the clinic's privacy protection practices.

Default Report for a Record Release

Select the default report for use when the user clicks the Print Record Release Form on the Patient Demographics window (under the HIPAA tab). Default setting is the report "Record Release Request".

Manage CPT Codes

All the codes you need to bill for services and products can be entered in the Products & Service Codes screen. Some standard codes are pre-populated, but you will need to edit the Fee and Tax fields to reflect your practice fee schedule.

Manage ICD-9/10 Diagnosis Codes

You can add, delete, or edit the Diagnosis Codes (ICD-9 or ICD-10) using this utility. These codes are used on the FeeSlip in the diagnosis column and in the Assessment/Plan section of an Encounter.

User Details

| First Name | MI Last Name | | Degree/Suffix |
|------------------------|--------------------|------------|-----------------------|
| Ima | K Doktor | | OD 💌 |
| Title/Position | <u>101</u> | vpe_ID N | lumber |
| | OtherID1 | * | Test 3174 Mar 11 |
| State Lic# | OtherID2 | × | |
| 084844 | OtherID3 | * | |
| DEA# | - Security Setting | s | |
| UPIN | UserName: ido | ktor | Change Password |
| NPI 1003049944 | Security Setting | E Level 10 | Type: Provider |

This screen allows the user to modify their own information, including license and insurance ID numbers. Certain items (such as security level and user type) can only be modified in the Admin settings.

User Name/Password

You can change the username here as well as the password (if the current password is known; otherwise the <u>Admin</u> account must be used to reset it)

Security Setting

The user security level is visible (but only modifiable by the <u>System Administrator</u>). The user can, however, change their username or password on this screen.

Set me as the Default user

On each computer (network or solo), the default username displayed at startup (on the LOGIN screen) is determined by this setting. The user who primarily uses this computer should check this box.

Folder Paths

| Default folder to save created PDF copie | 35; | |
|--|----------------------|-----|
| C:\ezHW_Data\Documents\ | | 9 |
| Default folder to store Patient Photos: | | |
| C:\ezHW_Data\Photos\ | | 9 |
| Default folder to store Attachments/Sca | nned Docs: | |
| C:\ezHW_Data_ALASKA\Documents | [cannot be modified] | 100 |
| Default folder to store Database Backup | is; | |
| C:\ezHW Backup\ | | 0 |

Set default locations for the following folders:

Path to PDF documents

When saving a PDF version of a report or Rx, this is the default location when asked to save file. Typically this would be your "My Documents" folder.

Path to Patient Photos

If you are capturing patient photos to include in the Patient Demographics window, this is the default location to store them. Typically this should be "C:\ezHW_Data\Photos".

Path to Database Backups

The default location where ezBackup stores backup images of your database.

Custom Lists

| List Item | Additional Data | |
|-----------|-----------------|--|
| llue | | |
| Irown | | |
| Sreen | | |
| 21 - 7 | | |
| | | |
| | | |
| | | |
| | | |

Throughout ezScriptWriter, there are various lists and choices that can be customized. You may edit or add to these lists by performing one of the following:

- Selecting list to edit in the dropdown box at the top.
- Clicking on the item to edit, or alternatively, selecting the NEW button to add an item to the list.

Report Settings

| | H/W/H/W/H/W/ | HONOCHADHONOC | - | A CONTRACTOR CONTRACTOR |
|---------------------------------|---|------------------------------------|------|-------------------------|
| Report | s/Letters | Prescriptions | E | ncounter Reports |
| elect Def | ault Reports to | Use for Rx Viewing/Prin | ting | |
| | | | | |
| | Defau | It Report to Use | | Default Report Title |
| | | the free provides and the second | | beruute receptive there |
| lank Rx: | Medication Rx | 0 | • | |
| lank R.x: Med R.x: | Medication Rx Medication Rx | e e | • | Med Rx |
| lank Rx: Med Rx: Spec Rx: | Medication Rx Medication Rx SRx (2 year e | ((xpiration) - Grid Format | * | Med Rx Spectade Rx |

Default Margins

The margin to use for reports, letters, Rx's and encounter printouts (if not set in the Report Designer) or otherwise not specified. This setting applies globally to all reports that do not allow you to set individual margins (e.g. when printing notes).

Default Report to Use

Allows the default report for each Rx type to be selected, as well as setting a default title. The four main Rx categories are: Blank Rx, Medication Rx, Spectacle Rx and Contact Lens Rx.

Auto Save

In some cases, you can specify that the software save your report without being prompted first.

Tool Settings

| Diopter Step Se Oefault to Oefault to | ection 1/4th steps 1/8th steps | Mouse button Left Butt Right But | for fine diopter movements: on ton |
|--|--------------------------------------|--|--|
| Automatically | copy first CL bra Rx's to LogBook | and to other eye | Include DEA# Open to "ExamSheet View" Default By Type (Mizard Top) |
| Select Default For | IL LO USE IOF FLX L | | |
| Select Default For Blank Rx: | Arial | • 11 • | C Blank Rx |
| Blank Rx: Medication Rx: | Arial Courier New | • 11 • • 11 • | C Blank Rx Medication Rx |
| Blank Rx: Blank Rx: Medication Rx: Spectade Rx: | Arial Courier New Arial | | Blank Rx Blank Rx Medication Rx Spectade Rx |

Allows customization of the Rx Tools in ezScriptWriter. The available options include the following:

Diopter steps

Applies to spectacle and contact lens Rx's. Can be either the standard 1/4 steps or in 1/8th steps (rounded to 2 digits however).

Mouse button

For fine adjustments on spectacle or contact Rx tools. Basically, this allows for the reversal of the effect of clicking on the right or left button. The default for fine movements is the left button (i.e. clicking with the left button increments or decrements the power by the default diopter step amount; the right button "jumps" to the clicked location.

Automatically copy first CL brand to other eye

Auto copies the selected contact lens brand from right eye to left (default is true) in the Contact Lens Tool.

Save all new Rx's to LogBook

Default is true; can be overridden when creating Rx with the Rx wizard.

Set default fonts

Set default fonts for the Rx data being inserted into reports. This can be modified if your reports are exceeding a full page when Rx data is inserted.

Default Rx Wizard

No longer used; the Multi-Medication wizard allows you to select the tool you wish to use.

Insurance List

The Insurance List allows for custom entry of any insurance plan you accept. The information you enter will appear on the claim exactly as you enter it.

| AARP Discount Administrators West Administrators West/ Adult Learning Programs of AK_Inc Advantice Eye Care Advantita Freedom | Company Name Address | |
|--|---|------|
| Aetna Aetna Discount Aetna/US Healthcare Aktna/Nicrosoft AK Medicaid - ACS Alaska Laborers H&S Fund AmelBen/IEC Group APIA Health Dept ARM Ltd Northwest AVMA Group Health and Life Insulance T Benne: Health Benesight Blue Cross of Washington & Alaska Blue Cross of Washington & Alaska | State Zipcode Telephone Fax Number Payer ID Insurance Notes | |
| Boeing Traditional Carpenters Trust CBSA Performax Cernent Masons & Plasterers Trust Cigna Cigna Heathcare COD | New 100 Debie | they |

3.9 PreTesting Module

[IN DEVELOPMENT]

The PreTesting module is in development. It will allow for entering of basic pretest information (e.g. visual acuities, lensometry readings) before an actual encounter is opened/created.

3.10 Software Versions

During the Trial period you may download and try any of the various version of ezHealthWare software. Once you have licensed the software, the database will only be associated with the software you have purchased.

| EzFrontDesk | \$89.00 annual license Basic patient demographic management with appointments |
|---|--|
| ezScriptWriter | and insurance claim billing. \$129.00 annual license Everything in ezFrontDesk plus the ability to generate printed or electronic Rx's. |
| Scan Your Charts | \$189.00 annual license Hybrid of electronic patient charts with scans of your existing paper charts. Includes ability to print/electronic Rx's. |
| ezChartWriter" | \$199.00 annual license A full-featured EHR system designed for optometrists and ophthalmologists. Includes creation of printed or eRx's. |
| How the different versions of the software compare: | ezScriptWriter ezScanYourCharts ezChartWriter |
| Patient Demographics 📝 | 244 |

Patient/Insurance Billing Appointment Scheduling Marketing/Recall Letters Attach Documents Print Letters/Handouts Print Prescriptions/Rx's Logbook of Rx's Given Scan Documents to Chart Full Electronic Medical Records

3.11 Misc Functions

Below are some of the miscellaneous functions you may need from time-to-time in the software.

Database Switcher

If you are using more than one database (for example, you travel between two offices and prefer to have separate databases or you work part-time doing nursing home visits) then the ezDataBaseSwitcher will allow you to change between databases with ease. The primary requirement is that the databases are kept in separate folders (whether on different computers or just different folder names). For example, you could have a laptop with two databases: one located at "C:\ezHW_Data_MainOffice" and the second at "C:\ezHW_Data_SecondOffice." To utilize both databases setup two databases by clicking the Manage Database List->New button sequence. Then by changing the database in the dropdown you can alternate between the two.



WARNING: Be sure to close all ezScriptWriter modules on this computer, since any running modules will crash if the database path is changed while running. Use the ezForceClose utility if necessary. Otherwise, possible database damage could occur.

| Use the Database Switches If you have | DATABASE Secection (| 2114111 | | |
|---|--|---------------------------------|---|--------------------------------|
| fatabase). Each ezHealthWare databas ietween clinic databases using this uti Current Databases. | multiple databases (for instance, seve ie is valid for a single clinic location, b lity: rting - Local Drive Database | ral practices ut if you trav | you work at that each ha vel between sites you can Manage Database Li | ive a seperati easily switc |
| Physical Path to Database: C:\e | zHW_Data\ezDB.dez | | x | |

Backup Status Bar

The last backup date is presented at the bottom left of the screen. If it has been a few days since the last backup you will see it appear in red.



Getting Help

The quickest way to display the help is to press F1. If context-sensitive help is available it will be displayed automatically.

Most of the screens in ezScriptWriter have a Help button that displays relevant information.

Help Select the Help item in the menu bar for additional help options.

Tip of the Day

Displayed when the software first starts, you can disable the Tips by unchecking the "Show tips at startup" box. You can re-enable at any time by using the Help->Tips menu.



Suggest Features

Use this utility (found under Help->Suggest a Feature in the top menu). Use the Upload button at the bottom to send the suggestion directly to our server. We review these suggestions and incorporate them into the software when feasible.



Other Utilities

ezForceClose

Located in the Program Files (x86)\ezHealthWare\ezUtilities folder, the ezForceClose program will close all ghost copies of the software running on this computer.



Note that if you have open work in ezScriptWriter you should save it first.



ezPathUtil

This utility allows the setting or clearing of folder paths for the various databases that ezHealthWare software uses. These databases are required for program operation, so any changes made here may cause the program to become inoperable on startup.



If the program cannot find the database on startup, try using the Find buttons to locate them. If you are re-installing the software and want a "Fresh Start" with a clean, new database use the Clear button to reset the location to the database.

| 🖹 ezPathUtility - Locates DB Paths | |
|---|--|
| Database Path Selector Utilit | у |
| This utility allows the setting or clearing of folder paths for the uses. These databases are required for program operation, s program to become inoperable on startup. If the program giv | various databases that ezHealthWare software to any changes made here may cause the es database errors; try clearing the folder path(s). |
| C\ezHW_Data\ezDB.dez | Set Clear |
| Path to Tool Database | 1 |
| C:\ezHW_Data | A Set Clear |
| Use the Find button to locate file on your hard-drive or network | Check Database Path Quit |

If there is concern that a networked computer is not connecting, you should verify that the path is correct. Use the Check Database Path to pull up a report of the connection status. It's a good idea to printout this report for each computer on your network in case you ever need to re-enter the paths for some reason.



3.12 ePrescribe

You can open the recommended ePrescribing website from the Main Screen or from the Multiple Rx Tool. A browser window will open (note that ePrescribing requires internet connection to function).



If you have an existing AllScripts account enter your UserID and Password to login. If you don't have an account yet, click the "Create an account" link to sign-up (it's free).

| Iser ID | |
|---|---------------------------------|
| assword | |
| Remember my User ID | |
| Log In | |
| on't have an ePrescribe User ID an't log in∓ <u>Click here</u> eading out? Prescribe for your o | Click here to greate an account |

Once you are logged in, you must create a new patient account in AllScripts so your prescription can be sent to the Pharmacy:

| | via Albirgen, com | | | | |
|------------|---|-----------------------|-----------------|---------------------|--------------------------------------|
| 8 Alterpts | Patient: Active allargias Active problems: Active modications: Hetail pharmacy Ball Order Pharmacy | i Die Patien Resoluti | Genative, (KCR) | Potent D | Bavid J Pentan Ob Dr Pentago Edit |
| Putterns | Contraction of the second | R VIII P | Fairs Istig | - Cant | Daniel Stiers Series Steel |
| Last Name | - 1) | | | Bearth (* Act Prime | Courton |
| | | | | | |
| | | | | | |
| | Net Paler Dep | | | | × |

Once the Patient Data screen appears, you will need to upload the patient to the AllScripts webpage. Do this by clicking in the Phone field (to align the data sequence) and then clicking the **Insert Patient Data** button at the bottom of the screen.

| Tired of entering your p | atlents manually? <u>Click (</u> | tere to request a l | Practice Management System Intert | ace - |
|--------------------------------|----------------------------------|---------------------|--|--------------------------------------|
| Save & Prescribe | Patient Allergy | Cancel | | |
| Phone: | | Revense Lookup | Mobile Phone: | |
| * Date of Buth | iect- ····· | | SSN# | int bilanin |
| Patient ID (MRR4) Address 1 | ` | 1 | | |
| Address 2 | | | State: WA - | * ZIP Gode: |
| E-mail: | Entered (edif) | | Step 1 - Click in the data will paste | e Phone field so the in sequence. |
| Insert Patient D | ato A | | Step 2 - Click the li Data to send to | nsert Patient AllScripts |

The patient should show up in the AllScripts Patient List, but if it does not enter the last and first name to Search.

| Last Name: <mark>sample First Nam</mark> | | me: <mark>j</mark> | Patient ID: | | Search 💌 | Add Patient | | |
|--|-------------------|--------------------|-------------|------------------------|----------------|------------------|--|--|
| R | eview History | Select Dx ► | Selec | ct Med >> | | | | |
| Patient ID Patient Name | | din | DOB | Phone Number | Street Address | | | |
| | 000001 | 01 Sample, Joe E | | 12/30/1967 | 425-555-8888 | 123 South Street | | |
| c | 1222 333- 4444 | Sample, Joe | | 12/30/1967 | 222-333-4444 | | | |

Make sure the patient is selected (black dot next to patient name) and click the Select Med button to begin the process of entering a prescription.

| Choose Medication | Tobra | Search | Patient History 🏵 My His | tory 🗢 All |
|----------------------|--|----------|--------------------------|------------|
| | FobraDex | Meds | | 4 |
| No med Coverage N | TobraDex ST Tobramycin one AvaTobramycin Sulfate Tobramycin Sulfate in Saline | | | [|
| Back / | dd to Tobramycin-Dexamethasone | iew. 🕨 🎽 | Review Script Pad | 1 |
| г | Tobrasol Medication And Sig | _ | | Quantity |
| 1 | Wee 194 | | L Deci and Luci Vices | Connet to |
| Enter a name to | a partial medication o view available list | | select | "All" |

| Choose Aedication | Gentamicin Sulfate | Search Meds | 🔍 Patient H | fistory 🔍 My History 🔍 | All Write Free Form Rx |
|----------------------|--------------------|----------------|-------------|------------------------|------------------------|
| Coverage: No | ne Available | harren | | | Review Med Histo |
| Back Sel | ect Sig 🕨 | | | | |
| | Drug Name | Strength | Unit | Dosage Form | Route |
| C | Gentamicin Sulfate | | | Powder | Does not apply |
| c 😔 | Gentamicin Sulfate | 0.1 | % | Cream | External |
| c 🕒 | Gentamicin Sulfate | 0.1 | % | Ointment | External |
| c 🔘 | Gentamicin Sulfate | 0.3 | % | Ointment | Ophthalmic |
| <u> </u> | Gentamicin Sulfate | 0,3 | % | Solution | Ophthalmic |
| c 43 3 | Gentamicin Sulfate | 10 | MG/ML | Solution | Intravenous |
| c 🙁 | Gentamicin Sulfate | 10 | MG/ML | Solution | Injection |
| c 🙂 | Gentamicin Sulfate | 40 | MG/ML | Solution | Injection |

you wish to send to the pharmacy

You must then click the Select Sig button to choose the Sig you wish to send with the Rx to the pharmacy:



| Choose | e Sig : Preferred | | | | |
|------------------------------|--|--|---|---|--------------------|
| Choose | or write a SIG for Ge | ntamicin Sulfate 0.3 | 1% Solution Ophthalmic : | | |
| Back | Patient Ed Sheet | Change Med | Add to Script Pad ► | Add & Review >> | |
| (• pr | eferred CAII C Wri | te Free Text SIG | | A 1 | |
| INIT INIT INS | IALLY 1 DROP EVE IALLY INSTILL 1 DR TILL 1 DROP IN BOT TILL 1 DROP IN LEF | RY HOUR, THEN F OP HOURLY, THEI THEYES EVERY 4 TEYE EVERY 4 H | PROLONG DOSING INTERVA N PROLONG INTERVAL TO 4 HOURS DAILY. IOURS DAILY. | LS AS CONDITION IMPROVE 4-6 TIMES DAILY AS CONDITI | S. ON IMPROVES. |
| iys Su Jantity efills: | pply: 5 | | Choose Package/Unit: Quantity = 2(2 x ML) Dispense As Written | ML | × |
| Specia | Library - A | dmin & Dosage macist (maximum | of 210 characters). Note: should | d not be used for patient instruct | ons or comments |
| | | | | | ~ |
| | Se | lect your preferred | Sig | Click Add 8 | Review |

You may see warning screens if any of the medications you selected trigger a flag (contra-indication, duplicate dose, etc):

| DUR C | heck | |
|-------|--|--|
| Back | Submit | |
| 0 | The following medications created warnings during the DUR process. Please review the warnings and take appropriate action or delete these medications from the script pad. | |

If all is well, you will see the Select Pharmacy screen, where you can send the prescription electronically to the Pharmacy of your (or your patient's) choice:

| Search by: C Patient History | Practice Favorites C All | C Mail Order Pharmac | ies | |
|--------------------------------------|--------------------------|----------------------|-------|----------------|
| Name: | City: | Stat | e; | ▼ ZIP Code: |
| Phone: + | Search |] | | |
| Current view: All practice favorites | | | | |
| Destination# | Address | City | State | Phone |
| WALGREENS DRUG STORE 06901 | 28817 MILITARY RD S | FEDERAL WAY | WA | (253) 839-1651 |

NOTE: The ePrescribe feature is based on the AllScripts free e-prescribing website. The AllScript database can check for drug interactions and contraindications that ezScriptWriter cannot. The AllScripts site is external to our software and is not an integrated part of the ezScriptWriter (so Rx data is NOT automatically passed to the website). You have to send the data manually; the steps above help you create a Rx with the website. You should also add the medication to your LogBook, even if you don't print an actual prescription for the patient.



4 Admin Functions

The Administrator Menu is the main portal to managing the software, including User accounts and Security Settings. In addition, you can purchase and register the software.

Software Account Admin Settings & Options Reset Passwords View Audit Trail

| Administrator Functions | or Menu |
|-------------------------|------------------|
| Software Account | Reset Passwords |
| Settings & Options | View Audit Trail |
| · | SysInfo X Close |

4.1 Software Account

The Manage Software Account screen will allow you to purchase the software (via secure link), register/ license your copy, view existing licenses and change the clinic telephone (which serves as the account number).

Purchase Software Register/License Software View Licenses Change Clinic Telephone Number

| 🗉 Manage Account Menu | |
|---|------------------|
| | <u>lenu</u> |
| Peepers Practice Tel# 3522591621 TRIAL PERIOD EXPIRED! Please purchase a software license at www.ezCl | hartWriter.com |
| Purchase Now! | View Licenses |
| Register Software | Clinic Telephone |
| | Close |

4.1.1 Purchase Software

Whether you are purchasing the software for the first time or renewing your license, the Purchase Software screen will the make the process super easy. The uploading of your order is our recommended method since there is no chance of mis-entering important account information that we need to generate your license file.

You can purchase in one of three methods:

- Via secure internet connection directly to our server (with full encryption of your credit card data)
- Generate a paper order form; submit via fax or mail
- Launch the website so you can order off the ezScriptWriter website.



4.1.2 Register/License Software

This is the tool you use to update your license after purchasing. Make sure the Primary Practice Telephone is filled in with the phone number for your clinic/office. This is the number we will use for licensing. It is NOT MODIFIABLE once licensed and will display in your as you have entered it. If you wish to change it in the future you will have to use the <u>Change Account Number</u> instructions. You only need to license ONE time, no matter how many computers you have networked.

| 🖩 Software Registration |
|---|
| Software Registration Utility |
| THIS PRODUCT IS LICENSED TO: |
| Dr David and Associates Tel# 4256451515 LICENSED - You have 3344 day(s) left before your license expires. 31FCC1051EE44DBF9QA8C7CFF MODULES: ezClaimBiller ezApptScheduler ezRecallManager ezDataExchange |
| We make our software freely available and fully functional for testing in the trial version, so that you can try out all the features and see if it really works for you. If you have already purchased a software Registration Code, please enter it below. |
| Primary Practice Telephone: Your dinic phone number serves as your account number. NOTE: The phone number, shown on Reports/Rx's, is locked in after registering the software. PLEASE DO NOT USE YOUR HOME PHONE OR CELL NUMBER; it is difficult to change after buying. |
| Registration Options |
| I would like to evaluate the software before purchasing |
| Five (5) day trial penod, totally anonymous Thirty (30) day trial, requires filling out a short survey form* |
| Already purchased a software license? C No C Yes |
| Activate Now via Internet Import License File www.ezchartwriter.com |
| |
| *NOTE: An Internet connection is required. Your survey data is kept confidential. |
| Reset License X Cancel |
| |

There are two options for updating the License File (registering your license):

Option 1 - Via the Internet

Click the Activate Now via Internet button. The software will attempt to contact our servers to retrieve your license file. Problems that can occur include:

- not enough time has passed since your purchase; all orders should be updated within 24-48 business hours.
- incorrect telephone number entered (you must include the exact digits as you indicated on your purchase order, especially country and area codes).
- no internet connection present
- attempting to license the wrong version of the software (from what you purchased)
- an internet error has left our server down (very rare)

Option 2 - Import License File
If the codes were sent via email or CD-ROM, copy the license files (not the folder itself) into your database folder (typically C:\ezHW_Data). Then click the Import License File button so the license updates.

4.1.3 View Licenses

The View Licenses screen allows for a review of existing licenses and the expiration dates. Note that ezScriptWriter will begin warning you about 30 days before your expiration date that you license is due for renewal.

| Coodine Doctails. | | |
|---|--|---|
| Licensed Telephone#: | 4256451548 | |
| Customer ID: | {DDB0FF61-DF75-442F | -86E2-505FF9977380} |
| Dr David and Associate | es Practice Tel | \$ 4256451515 |
| LICENSED - You ha | ave 3344 day(s) left before | e your license expires. |
| SERIAL# 31FCC-1051 | E-E44DB-F90A8-C7CFF | |
| | | |
| icensed Products | License Type | Expiration Date |
| icensed Products Module ezChartWriter | License Type Standard License | Expiration Date 5/1/2020 |
| icensed Products Module ezChartWriter ezClaimBiller | <u>License Type</u> Standard License Standard License | Expiration Date 5/1/2020 5/2/2011 |
| icensed Products <u>Module</u> ezChartWriter ezClaimBiller ezApptScheduler | License Type Standard License Standard License Standard License | Expiration Date 5/1/2020 5/2/2011 5/2/2011 |
| icensed Products <u>Module</u> ezChartWriter ezClaimBiller ezApptScheduler ezRecallManager | License Type Standard License Standard License Standard License Standard License | Expiration Date 5/1/2020 5/2/2011 5/2/2011 5/2/2011 |

The Revision Log button will display the current list of available upgrades for the software (if applicable). The Reset License is only used when directed by Tech Support to reset your licenses in the case of error or other issues.

4.1.4 Change Account Number

To change your Clinic Telephone number (which serves as the Account number and is part of the license file), you must follow two steps:

Build Email Data

Your primary practice telephone number serves as an unique identifier and is part of your license/ registration key. In order to change it (for example, if your area code changes or you move locations) you must send a request to us to have a new registration key code generated. The process may take up to 24-48 hours. We will generally verify the clinic telephone number to ensure that it is registered correctly.

| code. Use this button to ger (paste it into the body of yo | nerate the data we nee ur email): | d to complete the reque |
|---|--------------------------------------|-------------------------|
| Practice Telephone (current): | (425) 645-1548 | Use formatting as you |
| Practice Telephone (new): | (444) 555-1212 | appear on reports |
| Reason for change: | moved location | |
| DATABASE ID: 31FCC-1051E-E4 | 4DB-F90A8-C7CFF | |

Set New Number

Once you receive the confirmation email click the "Set New Number" button to make the change final. The software will automatically update your license for you (Internet connection is required).

| CONTRACTOR OF A | |
|------------------|--|
| TEP TWO: Afte | r you receive the confrimation email from us, click the button |
| elow to change t | the telephone number. WARNING: Wait until you receive the |
| | |
| onfirmation ema | il otherwise you will lock yourself out of the software! |
| onfirmation ema | il, otherwise you will lock yourself out of the software! |
| onfirmation ema | il, otherwise you will lock yourself out of the software! |

4.2 Settings & Options

The Admin Settings & Options screens allow you to set the overall properties for the software. This includes the Clinic Details, User Security, Overall Security and International Defaults.

Clinic Details User Details/Security Global Security Settings International Defaults

4.2.1 Clinic Details Screen

The Clinic Details screen allows for entry of the Practice Information, including the all-important Practice Telephone number (which serves as your Account Number). Once the software is purchased and

licensed, the Practice/Clinic Telephone number cannot be changed unless done by Tech Support. You can however change the formatting of the number at any time (e.g. add parenthesis or dashes). The remaining fields can be altered in any way you wish. If you have a group tax ID number and/or NPI, enter it on this screen.

The field "Doctor Name/Title" is used in many reports/Rx's, so it should reflect your name as you wish it to appear in reports.

| X Ployial | ii Settings & | options - Aun | IIII Level |
|---------------------------|-------------------------------|-------------------------------|---------------------------------|
| linic Details/Report Disp | ay User Details/Security | Global Security Settings | International Defaults |
| The information entered | on this page effects the data | displayed on your reports and | l exam printouts. |
| Doctor(s) Name/Title | Ima K Doktor, OD PS | (as | it will appear on reports) |
| Practice/Clinic Name | Dr Ima Doktor and Associa | ites | toonen-2. An-11 actor (1946). A |
| Practice Address1 | Main Street Optical | | |
| Practice Address2 | 3561 E Main Rd, #8 | | |
| Practice City | Seattle | | |
| Practice State | WA ZipCode | 98002 | |
| Practice Telephone | (425) 645-1548 | Edit Group Practi | ce TIN |
| Practice Fax | (425) 776-7300 | | |
| Practice Email | | Group NPI (if | applicable) |
| Practice Website | | | |

4.2.2 User Details

The Administrator can manage the various users (including him or herself). You can Add, Edit or Delete users (although making an existing user "inactive" is preferred). The security levels and basic information can be edited on this screen.

Every user will have three required settings:

User Type

The user type can be either Staff or Provider. A staff member is someone who does not provide direct patient care; a provider is classified as someone who does provide direct care (doctor, nurse, tech). In some cases, you may wish to limit lower level providers to the Staff category to restrict access to Rx creation, although many features can be blocked by setting the proper security level.

Security Level

Security Level can be set by clicking the Security Level on the User Details screen:

| User Details | |
|-------------------|---|
| First Name | MI Last Name Degree |
| lma | K Doktor OD 👱 |
| Title/Position | D Type ID Number OtherID1 BQ 🖌 849999 |
| State Lic# | OtherID2 |
| 4883 | OtherID3 |
| DEA# | Security Settings |
| UPIN | UserName: idoktor Change Password |
| NPI 1384993948 | Security Setting: Level 10 User Type: Adjust Security Settings Provider Set as the default Provider for your clipic? |

The Security Level can be set quickly using the Quick Security Settings slider (from 0, the lowest, to 10, the highest). Level 10 should be reserved for yourself, the Admin. Click the Use Custom button to modify individual settings.

| User Security Settings | Quick Security Setting Current Custo Lo |
|--|--|
| Main Menu Options | Clinical Reports & Encounters |
| Allow user to open Pulled Charts list | Allow viewing of finalized encounters |
| Allow user to open eReminders | Allow editing/signing of pending encounter |
| Allow user to open Special Functions | Allow viewing of Rx's |
| Allow user to open Program Settings | Allow editing/signing of Rx's |
| ☐ Allow user to open Billing/Claims Module | Allow viewing of Reports |
| ☑ Allow user to open Appointment Scheduler | Allow editing/signing of Reports |
| Allow user to open Recall Manager | Allow user to view Clinical Notes |
| Allow user to open Data Exchange Module | 🧮 Allow editing/signing of Clinical Notes |
| Patient Demographic Editing | Special Features |
| Allow user to open "New" cabinet drawer | Allow user to open the Report Designer |
| Allow user to open "Open" cabinet drawer | T Allow user to download software updates |
| C Allow user to Delete/Merge Patients | Allow user to modify patient name |
| Select/Deselect ALL | |

Active Status

Users who are no longer with your practice should be marked lnactive, rather than being deleted from the system. Deleting a user who has created reports, Rx's or encounters will cause some difficulties with tracking. To set the status, click the checkbox under the column "Active"

| 0.0000000000000000000000000000000000000 | 1.00 | 1500 | Live Free | loss autom | 1434532 |
|---|-----------------------|------|----------------|---------------|---------|
| | FirstName | MI | UserType | SecurityLevel | Active |
| Almaguer | Antoinette | - IN | Starr | 4 | 7 4 |
| aivora | Linanes Anno Mario | | Stall Chaff | 1 | |
| | Anne ware | P | Dravidas | 10 | |
| | | | | | |

4.2.3 Comprehensive Security Settings

The Global Security Settings apply globally to the software. The only entry currently customizable by the user is the Auto Log Off time.

| Clinic Detail | s/Report Display | User Details/Security | Global Security Settings | International Defaults |
|---------------|--|------------------------------------|--------------------------|------------------------|
| 0 | NOTE: These se | ettings apply to all users on | all computers. | |
| Au | to log-off after this | many minutes: 60 minute | es 💌 | |
| 2 | Automatically log Track log-on atte | all Usar Transactions (cre mpts | ate audit (rail) | |
| 2 | Allow zero length Set minimum pas Force password | sword length: 5 char | racters | |
| ŕ | Force password | lo centain: 1 hum | bers | |

4.2.4 International Settings

Users outside the United States will need to set the date, telephone, postal code and measurement fields to reflect their locale.

| Clinic Det | ails/Report Display Use | er Details/Security | Global Security Setting | International Defaults |
|------------|---|-----------------------|-------------------------|------------------------|
| j)]]] | If you are using the sol the defaults used by th | ftware outside of the | United States, you may | adjust some of |
| | and action to concer by a | | | |
| | | Formatting Ma | ask Formatting | Preview |
| | General date format: | mm/dd/yyyy | ✓ 03/06/2011 | |
| | Telephone formatting: | (999) 999-9999 | (912) 345-678 | 9 |
| | Postal Code format: | 99999-9999 | → 45678 | |
| | Measurements: | ⊂ Metric . ● Nor | n-Metric Dist: 20' Tem | p: 98.8 F |
| | | | | |

4.2.5 Locate Database

When the network link is broken or the database folder has been moved, you may need to use the Locate Database Utility. Use the Find Button (small binocular icon) to search your local hard-drive or network.

Clear Database Path

Use this button to clear the database path stored in the computer's registry. This forces the Setup Wizard to show at the software startup.



4.3 Reset Passwords

If a user has lost or forgotten their password you can reset it with this utility. Alternatively, you can reset all user passwords at once.



When the password is reset, the new password becomes the same as the username. So user "idoktor" will have the password reset to "idoktor". The first time the user logs in the software will require a real password to be entered.

To reset the Admin password, you will need to contact Tech Support.

4.4 Audit Trail

The Audit Trail is the means by which nearly all transactions of the database can be tracked. Whenever a chart is opened/accessed, a module is opened or demographics are changed an entry will be created. This tool can also be used to track logon and logoff times from the software. Click the Export button at the bottom to send the file to your hard-drive (to be opened by Microsoft Excel or similar).

| Select Pa | tiont) Name A | ll Patients | User | | Date From 10/30 | /2007 10/30/2007 |
|-----------|------------------|---------------|--------------|----------------------|-------------------|----------------------|
| Module SI | ow All 💌 | Action Show A | J 💌 | Type/Object Show All | Sort by TimeStamp | Descending |
| Trans | D Module_N | Action_N | ObjectType N | Patient | Licer_N | TimeStamp- |
| 390 | 32 ezCharfWriter | Login | Admin | n/a | Admin | 3/6/2011 8:13:30 PM |
| 390 | 91 ezChartWriter | Open | Chart | Sample. Joe | Pedigo, David J | 3/6/2011 7:45:24 PM |
| 390 | 90 ezChartWriter | Login | User | n/a | Pedigo, David J | 3/8/2011 7:45:15 PM |
| 390 | 89 ezCharfWriter | Login | Admin | n/a | Admin | 3/6/2011 7:25:50 PM |
| 390 | 88 ezChaitWriter | Start | Application | n/a | n/a | 3/6/2011 7:25:47 PM |
| 390 | 87 ezChartWriter | Login | Admin | n/a | Admin | 3/6/2011 7:02:12 PM |
| 390 | 96 ezChartWriter | Login | User | n/a | Pedigo David J | 3/6/2011 7:01:57 PM |
| 390 | 35 ezChaitWriter | Start | Application | n/a | n/a | 3/6/2011 7:01:55 PM |
| 390 | 84 ezChartWriter | Open | Demographics | Sample, Joe | Pedigo, David J | 3/6/2011 12:30 29 PM |
| 390 | 83 ezChartWriter | Open | Demographics | Sample, Joe | Pedigo, David J | 3/6/2011 12:28:43 PM |
| 390 | 82 ezCharfWriter | Login | User | n/a | Pedigo, David J | 3/6/2011 12:28:34 FM |
| 390 | 31 ezChartWriter | Start | Application | n/a | n/a | 3/6/2011 12:28:30 PM |
| 390 | 80 ezChaitWriter | Open | Demographics | Sample, Joe | Pedigo, David J | 3/6/2011 12:14:05 PM |
| 390 | 79 ezChartWriter | Login | User | n/a | Pedigo, David J | 3/6/2011 12:13:57 PM |
| 390 | 78 ezChar/Writer | Start | Application | n/a | n/a | 3/6/2011 12:13:54 FM |
| 390 | 77 ezCharfWriter | Login | User | n/a | Doktor, Ima K | 3/5/2011 4:21:25 PM |
| 390 | 76 ezChartWriter | Login | User | n/a | Pedigo, David J | 3/5/2011 3 36 17 PM |
| 390 | 75 ezChartWriter | Start | Application | n/a | n/a | 3/5/2011 3:36:15 PM |
| 390 | 74 ezChartWriter | Login | User | n/a | Doktor, Ima K | 3/5/2011 3 08 20 PM |
| 390 | 73 esChartWriter | Login | User | n/a | Pedigo, David J | 3/5/2011 3:06:04 PM |
| 290 | 72 esch-duch | Starl | Application | n/a | p/a 👘 🏘 | 3/5/2011 3 05 51 644 |

4.5 System Info

Use the SysInfo button in Admin or at the bottom of the menu Help->About ezScriptWriter to get a detailed look at the computer and software. This may be requested by Tech Support if you are having troubles.



The report can be printed, faxed or uploaded directly to our server. Please email when you upload a report so that we can review it promptly.

System Information

Ŀ

| zHealthW | /are - SOFTWARE/S` | STEM INFO | | |
|--------------|------------------------|----------------------|-------------|--|
| zChartWr | iter, Version 4.2.1 | | | |
| /erDate: 0 | 3/04/2011 | eaaka | | |
| astBacku | e: 3/1/2011 11:12:56 | 3:04 PM | | |
| VSTEMI | NEO | | | |
|)perating | System: Windows XP | Version 5.1.2600 Ser | vice Pack 3 | |
| 5.1 (Build 2 | 2600) Desili and ta | | | |
| PU: Intel | Frentium 32-DIC | | | |
| otal Phys | ical Memory: 2,095,48 | IOK | | |
| wailable F | Physical Memory: 939, | 772K | | |



5 Troubleshooting Problems

Network Crash

Network crashes are the worst diaster that can befall your database! If you are working on a chart at the same time the network goes down, there is a high probability that you database may be damaged. Using a wireless network for a portion of your network increases the risks. Since ezHealthWare software is an intensive database-driven program, you can expect a wireless network to be slower than a typical 100Mbps wired LAN (how much slower depends on the wireless system you choose). If you must use a wireless network, it is probably best to use the exam room computer as the server and let other computers link into that system. Bad network cards and faulty cables can also be a culprit.

Broken network connections, as sometimes happen with wireless systems, can result in database corruption! Do regular backups of your data (at least daily).



Database Crash

You will recognize a database crash when you see this dreaded message: Unrecognized Database Format or something similarly ominous.

STOP

WARNING: Do an immediate backup using the instructions below before doing anything else!

(1) Make an immediate backup (copy the entire "C:\ezHW_Data\" folder to a flash drive and/or external drive (BEFORE DOING ANYTHING ELSE).

(2) Do you have an existing recent backup? If so, roll back to that copy.

(3) If it's been a few days since your backup, send the following file to us so we can analyze and attempt to repair the database:

C:\ezHW_Data\ezDB.dez

Right-click and choose Send To->Compressed Folder to zip the file; better yet use the ezBackup utility to create a copy that's already compressed.

You can use the link we send you to securely upload the database to us (do this at the end of your workday; we will TRY and return it the next day if it is repairable). Note that some database crashes cannot be repaired and you MUST return to your most recent backup.

Software Crashes - low memory

The MOST common cause of crashes of the software is due to low memory. If you are running the software and getting persistent errors (that don't seem to have a pattern), ask yourself if you have (1) 2 or more charts open at once and (2) less than 2 GB of RAM. If so, upgrade your RAM. You can also increase the size of your Virtual RAM. This allows you to simulate RAM by using your hard drive to store the data that would be on the physical RAM.

Steps to Increase Virtual Memory

- 1. Under the start menu go into the Control Panel.
- 2. Double click Performance and Maintenance and then on System.
- 3. Under the Advanced tab click on Performance and then on Settings.
- 4. Where you see Virtual Memory shown click Change.
- 5. Click on the hard drive where your OS is installed (this is where your paging file should be).
- 6. Once you have completed all of this check the Custom Size checkbox. Now you are able to input how much memory you want to save for virtual memory. There will be two fields there, the first one is called initial and the other is called maximum. If you want the best performance out of your machine you should set these the same as each other.

Vista Compatibility

We recommend Windows 7 Professional or WinXP for all our software products. Win7 can be either 32 or 64 bit systems. In many instances our software runs perfectly in Windows Vista. But in some situations, there may be minor, or even major, malfunctions. This is especially true for the Database Upgrade utility, Online Licensing module and scanning modules. To get around this problem, you simply need to start the software in XP Compatible Mode.

To use Windows XP compatibility mode, right-click the ezScriptWriter icon and choose **Properties** from the context menu that appears:

| | Open | |
|---|---------------------------|---|
| 1 | Run as administrator | |
| | 7-Zip | 1 |
| | Pin to Start Menu | |
| | Add to Quick Launch | |
| | Restore previous versions | |
| | Send To | |
| | Cut | |
| | Сору | |
| | Paste | |
| | Create Shortcut | |
| | Delete | |
| | Rename | |
| | Properties | |

After choosing Properties from the context menu, a window will appear displaying the different properties of the application organized in tabs. Select the Compatibility tab to run the application Windows XP mode:

| Security | Details | Previourcillentines |
|--|---|--|
| General | Shortcut | Compatibility |
| you have problem n earlier version of natches that earlie Compatibility mod | ns with this program ar f Windows, select the r version. e | nd it worked correctly on compatibility mode that |
| Mindows VD / | Granter Deals 20 | |
| MUDOWS AF 1 | Dervice Fack 2) | |
| Settings | | |
| 🔲 Run in 256 (| colors | |
| Run in 640 | 480 screen resolution | 3 |
| 💟 Disable visu | al themes | |
| 👿 Disable desi | top composition | |
| Disable disp | lay scaling on high DF | ^o l settings |
| Privilege Level | | |
| Run this pro | gram as an administra | tor 🔓 |
| Show setting | ngs for all users | |
| | | Connered Access |

On this screen, place a check in each of these checkboxes:

- Run this program in compatibility mode for Windows XP (service pack 2)
- Disable Visual Themes
- Disable Desktop Composition

Then click OK to save the changes.

NOTE: If this does not work and problems remain, try running the Program Compatibility Wizard by clicking the Start button, clicking Control Panel > Programs > Programs and Features > Use an older program with this version of Windows

If compatibility mode and the wizard does not solve the problem, contact Tech Support for further help.

Upgrading Database Fails

If your attempts to upgrade your database fail, you may need to run the software as an Administrator (in Vista/Windows7). Right-click the application ezScriptWriter.exe and choose **Properties** from the

context menu, a window will appear displaying the different properties of the application organized in tabs. Select the Compatibility tab to run the application Windows XP mode and check the Run as Administrator checkbox. Once the database has finished upgrading you can uncheck the box.

| Security | Details | Previous |
|--|--|--|
| General | Shortout | Compatibility |
| you have probler n earlier version o natches that earlie | ns with this program ar f Windows, select the r version. | nd it worked correctly on compatibility mode that |
| Compatibility mod | le | |
| Run this ord | oram in compatibility m | iode for |
| Windows VP / | Service Back 2 | - |
| WUNDWS AF I | Service Fack 2) | |
| Settings | | |
| 🔄 Run in 256 | colors | |
| Run in 640; | x 480 screen resolution | 3 |
| 💟 Disable visu | al themes | |
| 🔽 Disable des | ktop composition | |
| Disable disp | lay scaling on high DF | Pi settings |
| Privilege Level | | |
| Fun this pro | gram as an administra | tor 🞝 |
| Show setting | ngs for all users | |
| | | 17 |

Locked Chart

If you attempt to open a chart that has already been opened by yourself or another user, the Locked Chart warning appears. A problem may occur when a chart was opened and the software crashes leaving the chart still marked as open. If this is the case, then it is safe to use the "Unlock Chart" button. If you are unsure or another user may possibly have the chart open, it is best to check with other users before attempting to unlock the chart.



Uninstalling the Software:

(1) In the Windows Control Panel, click the "Add/Remove Programs" icon.

(2) Find the entry for ezScriptWriter and click "Remove"

(3) Navigate to "C:\Program Files" and delete the entire folder "ezHealthWare"

NOTE: This does NOT delete the patient database. To delete the existing database use the topic "Instructions to do a Fresh Start (with empty patient database)".

How to Rollback to Prior Version of Software

Starting in version 4.0 and later, the software retains the prior version so your can rollback if your have problems (for instance, your database did not fully upgrade and the new version does not start). To switch back, you simply need to recreate an icon on your desktop for the old version. Navigate to your program folder (typically it is "C:\Program Files\ezHealthWare\ezScriptWriter", although on 64-bit systems select "Program Files (x86)"). Be sure it is NOT the ezHealthWare 4.0 folder, you need the one without "4.0". Now find the file called "ezScriptWriter" and double-click it.

Alignment Problems with Claim Printing

There are two reasons that claims may be misaligned:

(1) The text is spaced properly, but prints slightly offset from the boxes. This can be fixed by adjusting the margins with the Alignment tool. You will have to use trial and error to move the text up/down or right/left.

(2) The problem may be with the font, not the alignment. On some computers the default system font is "proportional" and so all the text is squeezed together. To fix the issue, you must select a different font. On the alignment tool, select the font "Lucida Console" or "Courier" and font size "12". That should fix the alignment problem (you can try other fonts if it doesn't, but these usually work best).

Insurance Address & Name Not Printing

The insurance will only print on the upper right hand side if it is an existing insurance from the drop-down list (which you select in the Patient Demographics screen). If you mistype or hand-enter the insurance name, it can't be matched to an existing insurance company in the database.

If you wish to add or edit an insurance company, use Main Menu->Program Settings->Insurances in ezScriptWriter or within the ezClaimBiller module you can use the top menu Options->List of Insurance Plans

Dealing with a Total Network Outage

(1) Keep a 4-GB USB stick drive handy (empty)

(2) Keep a laptop computer in the office with the newest version of ezScriptWriter installed. But don't run the software yet, since it doesn't have a database to attach to (yet)

(3) When you have a network emergency, use the USB stick drive to copy the database folder from your server to the stick drive. You need to copy the five files that end in ".dez" to a folder on the stick drive you create called "ezHW_Data".

(4) Once the files are copied, insert the stick drive in your laptop.

(5) Start ezScriptWriter on the laptop. If it's the first time run, it will show a setup screen and as whether you've installed before... say YES and select Find Database. Link to the files on your USB drive. If you have run ezScriptWriter before on this computer, it will open to the blank database. Simply click Switch Database on the main screen and select the location on the stick drive.

(6) Now you can enter data normally on your laptop... for instance working in your exam room right on the laptop.

(7) When your network is operating again, you need to copy the database files back on to the server. Be careful that you are copying FROM the usb drive TO the server.

(8) Restart computers on your network and they should be back to normal operations.



6 Software License Agreement

This ezScriptWriter Software End-User License Agreement ("EULA") is a legal agreement for the ezScriptWriter Software Product in which this EULA is contained, which includes computer software and may include associated media, printed materials, and "online" or electronic documentation (collectively the "Software Product"), between you and ezScriptWriter Software. ("ezScriptWriter Software"). By installing, copying, or otherwise using the Software Product, you agree to be bound by the terms of this EULA. You must indicate your agreement to be bound by the terms of this EULA by pressing the "I ACCEPT" button on the Software Product's installation program, or else you will not be able to install the Software Product. If you do not agree to the terms of this EULA, you may not install or use the Software Product; you may, however, within 30 days of your initial purchase of a copy of the Software Product, return the entire copy of the Software Product (including all computer media, packaging and documentation) either to ezScriptWriter Software's Customer Service department or to the retailer from which you purchased the Software Product, for a refund of the amount indicated by your sales receipt for the Software Product, in which event your rights under this EULA are immediately terminated. If you are installing the Software Product on a computer that is not owned by you, you are bound to the terms of this EULA both in your individual capacity and as an agent of the owner of the computer, and your actions will bind the owner of the computer. You represent and warrant to ezScriptWriter Software that you have the capacity and authority to enter into this Agreement on your own behalf as well as on behalf of the owner of the computer the Software Product is being installed upon. For purposes of this EULA, the "owner" of a computer is the individual or entity that has legal title to the computer or that has the possessory interest in the computer if it is leased or loaned by the actual title owner.

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