Office Hours Professional

Patient Appointment Scheduler

User Manual

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Version 14

medisoft™

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Table of Contents

Preface

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Chapter 1

Introduction

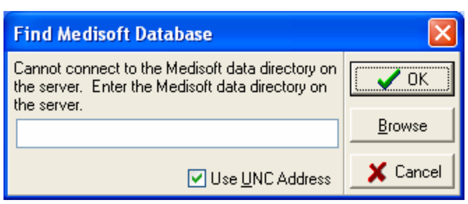
Starting the Program

Click the Office Hours icon on your computer desktop or go to the Start menu in the Task bar and select **Programs**. A drop-down list showing all the programs installed in your Windows Operating System is displayed. Select **Medisoft**. If Office Hours has been properly installed, it will be one of the choices under the menu. Select **Office Hours Professional** to open the program. If you are using Office Hours Professional integrated with any Medisoft program, you can also click the Appointment Book Speed button in the Speed bar of the Medisoft program.

Office Hours can be easily accessed at the same time you are working in other Windows-based programs. Open Office Hours at the beginning of each day and then minimize it. Hold down the **ALT** key while pressing the **TAB** key repeatedly to produce a small window that takes you through all the icons for the open programs on your computer. Lift your fingers off the keys when the black rectangle surrounds the Office Hours icon, and the program will activate. You can then perform the desired scheduling tasks, minimize the program, and return to your previous task.

Office Hours Professional Stand-Alone Setup

The first time you open Office Hours Professional, the **Find Medisoft Database** window appears.



Enter the root data directory or click **Browse** to locate the directory. If you use the program on a network, you can enter the UNC address of the shared folder (e.g., \\ServerName\FolderName). If you use the UNC address, you do not need to map a drive and use the drive letter to access your data. Click **OK**.

☞ If you do not use Office Hours Professional on a network, uncheck the **Use**

UNC Address box.

After you enter the root data directory, the program opens the **Create Data** window. You have two options: create a new set of data or convert previous Office Hours data.

☞ If the root data directory you enter is brand new, a message will appear telling you it is not an existing root data directory and then ask if you want to create a new one. Click **Yes** to accept the directory as your root data directory. Click **No** to go back to the **Find Medisoft Database** window.

Create Data

Click **Create a New Set of Data**, and the **Create a New Set of Data** window appears. Click the window and, in the spaces provided, enter the practice name and practice data directory. Then click **Create**.

After you create your data set, the program will indicate that you need to create a provider for the practice. Enter the provider information in the **Provider** window that appears and click **Save**. Then you can move about the program.

F1 Look up Provider Entry.

Convert Data

Click **Convert Windows Office Hours Data**, and the **Medisoft File Conversion** window appears. Click **Search for Data** to search your physical hard drive for any MWDBLIST.ADT files. When found, the program lists all valid data directories in the window.

☞ A valid data directory is one that contains data.

Of the data sets listed in the **Medisoft File Conversion** window, you can select as many or as few as you would like to convert at one time. There is a **Cancel** button available which, when clicked, will stop the conversion of the currently selected data directory. If one data set conversion is cancelled, the program will proceed to the next selected data set (if there is one) and complete the conversion of all selected data sets.

When the data sets are converted, your original data directories remain unchanged, except a CONVERT.LOG file (and possibly a DATABASE.CLI file) is created in each data directory that is converted. The program creates a new directory for each converted data set in the root data directory you specified when you installed your latest program. The first new data directory is automatically named DATA, and the second is named DATA1, with each new data directory named consecutively after that (e.g., DATA2, DATA3, etc.). The program relies on this naming convention to function properly.

STOP **DO NOT RENAME THESE DATA FILES.**

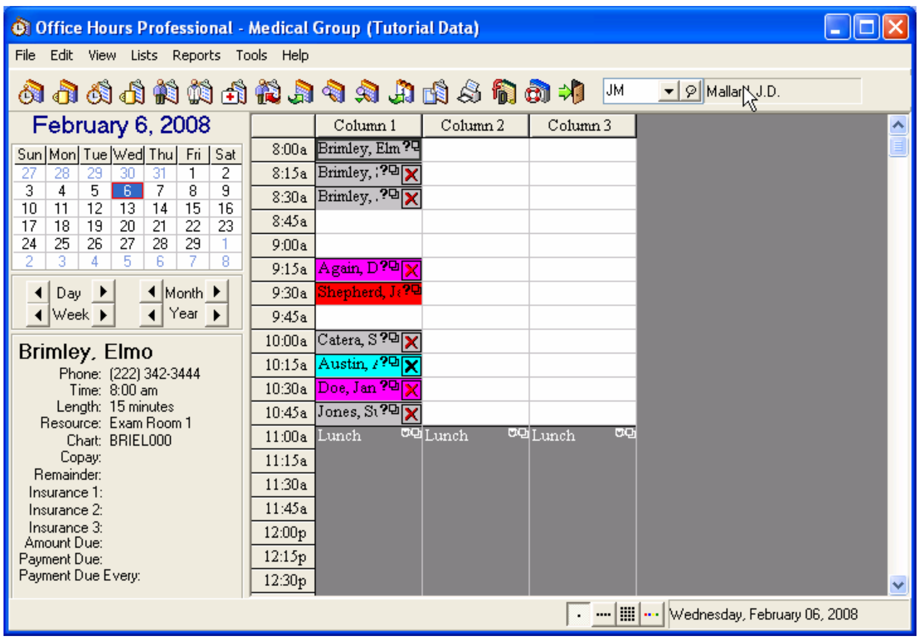
To identify which practice files are contained in which data directory, use the **Open Practice** window, which contains the data path for the highlighted directory.

It is recommended that you do not delete the old data directories until you know for certain that the newly converted data is complete.

F1 Look up Conversion of Data.

A Look at Office Hours Professional

The Title bar at the top of the window shows the program name and the practice information.



Below the title bar is the Menu bar, which is explained later. Below the Menu bar is a toolbar (or Speed bar) with speed buttons (or icons) that provide quick access to most parts of the program.

The program opens to a full appointment display. The current date is fully spelled out in color and the actual date is highlighted on the calendar in contrasting color.

Below the calendar are advance and reverse arrows with **Day**, **Week**, **Month**, and **Year** fields. Clicking the arrow to the right of a field name will advance the calendar to the next day, week, month, or year. The arrow on the left side takes you back to the previous day, week, month, or year.

The main portion of the window is the appointment grid, where appointments and breaks appear. Above this grid, in the toolbar, is the provider box with a drop-down list that includes the current providers set up in the program.

The lower left portion of the window displays the details of any selected appointment or break. When you click an appointment or break on the grid, information about that appointment or break appears in this area.

At the bottom of the window, in the Status bar, are four squares with various dot patterns that provide quick access to different appointment views. The first, with one dot, opens a Single Provider grid, showing those appointments scheduled for the selected provider on the day highlighted on the calendar. The second box, with three dots in a row, opens a full week's schedule. The third box shows a full month's appointments. The last box displays any combination of provider and resource columns, each variation of which is called a Multi View. Various combinations can be set up in **Program Options** (File Menu).

Menu Bar

The Menu Bar, found under the Title bar, contains various menus which list the activities available in Office Hours.

Clicking any of the menu headings, such as **File** or **Edit**, or using the accelerator keys opens a submenu with all the options available from that menu.

File Menu

Within the **File** menu are options to open new or existing appointment books. There is also an option to convert data. Select **Program Options** to set basic program options. **File Maintenance**, **Backup Data**, **Backup Scheduler**, and **Restore Data** are important tools for managing your database files. **Security Setup**, when applied, causes two more options to appear in the **File** Menu: **Permissions** and **Log in as another user**. There are also the options to use **Office Messenger** (integrated with Medisoft Network Professional only) and to **Exit** the entire program.

Edit Menu

Besides the usual options to **Cut**, **Paste**, **Copy**, and **Delete**, the **Edit** menu provides access to such functions as **Go to Today**, **Go to Date**, **Find Open Time**, and **Find Next Open Time**.

View Menu

The **View** menu lets you decide what portions of the calendar to display. You can display or hide the **Calendar**, **Status Bar**, **Toolbar**, the template **Legend**, and/or the

Wait List. This menu gives you access to **Zoom In**, **Zoom Out**, or **Zoom** to select your own setting for closer or more general looks. You can **Revert to Default View** settings or **Refresh** the calendar, to bring it up to date with the changes that have been made. You can **Edit View** or **Save View**. The menu also gives access to the **Day View**, for a look at a single provider's appointments for one day; **Week View**, to show the week at a glance; **Month View**, which shows booked times for the full month; and **Multi View**, which displays any configuration of provider and resource columns in one grid window. Lastly, you can **Edit Templates** from this menu.

▪ Lists Menu

Under the **Lists** menu, you can display the **Appointment List**, **Break List**, **Patient List**, **Provider List**, **Resource List**, **Reason List**, **Template List**, **Patient Recall** (integrated only), and **Superbill Tracking List**.

▪ Reports Menu

The **Reports** menu gives you access to the following options: **Appointment List**, **Appointment Status**, **No-Show Report**, **Print Appointment Grid**, **Print Superbills** (integrated only), **Appointment Analysis by Provider**, **Appointment Analysis by Reason**, **Templates**, **Reasons**, and **Waiting Appointments**. You also have access to the **Custom Report List** (integrated only), **Load Saved Reports**, and **Design Custom Reports and Bills** (integrated only).

▪ Tools Menu

The **Tools** menu provides **System Information**.

▪ Help Menu

The **Help** menu includes access to the **Office Hours Help**, **Show Balloon Hints**, **Clear Custom Grid Settings**, **Clear Window Positions**, **Medisoft on the Web**, **Online Updates**, and **About Office Hours**.

Speed Buttons on the Toolbar

Below the Menu bar, there are speed buttons (or icons) on the toolbar that give you quick access to various functions of Office Hours, such as setting appointments and most of the search functions.

The speed buttons are illustrated to facilitate easy recognition of their functions.

 The Appointment Entry button lets you set up an appointment.

 The Break Entry button opens the setup window for creating a break.

 The Appointment List button displays the current appointment schedule.

 The Break List button prints out the breaks that have already been set up.

 The Patient List button accesses the **Patient List** window.

 The Provider List button accesses the **Provider List** window.

 The Resource List button shows all treatment and examination rooms or labs.

 The Patient Recall button opens the **Patient Recall List** window (integrated only).

 Go to a Date lets you set up guidelines for searching for a patient.

 Search for Open Time Slot triggers a search for an opening in the schedule, as per guidelines or parameters you establish.

 Search Again renews the search in a more extensive manner.

 If you are scheduling in another part of the calendar, the Go To Today button takes you right to the current day's list of appointments.

 The Edit Templates button puts the Appointment Grid in a modification mode to edit templates.

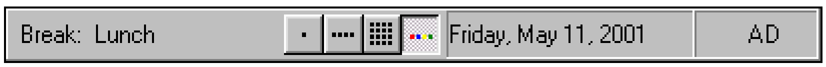
 The Print button prints the **Speed Report** designated in the **Program Options** window.

 The Help button opens the Help file's Table of Contents, from which you can choose the area in which you want more information. The **F1** key takes you directly to the Help files pertaining to the part of the program in which you are working.

 This button launches FinalDraft, a word processing application.

 The Exit button closes down the entire program.

Four View buttons in the status bar at the bottom of the window take you to the Single Provider, Week, Month, or Multiple Provider/Resource View appointment grids.



The Status bar displays a written summary of the functions of the speed button or field on which the cursor is resting. It also displays, if security has been applied, who is logged in to the computer.

Chapter 2

Set Up

Before You Start Scheduling

There are several portions of the program that have to be set up before you start scheduling.

☞ If you use Office Hours Professional integrated with Medisoft, all the records you enter in Medisoft will be accessible in Office Hours Professional.

- First, set up provider records. If you are booking appointments for lab work or therapy, each of those technicians should have a provider number and schedule and so should each office member whose schedule will be included in the Office Hours program.
- Second, set up your patient records.
- Third, create your resource records. You can include all treatment apparatuses in this list, as well as consultation and treatment rooms, so that you do not double book a room or equipment.
- Fourth, establish the number of booking columns you want.
- Fifth, clarify program options, such as establishing appointment length, creating whatever views you need for viewing multiple columns at once, and deciding how much information you want displayed in your appointment blocks in the appointment grid.
- Sixth, set up breaks and recurring breaks, to show lunch hour, set coffee-type breaks, seminars, etc.
- Seventh, set up the security feature.

Setting up Provider Records

A provider record must be set up before Office Hours can run. If no provider record is set up, Office Hours will automatically prompt you to do so. You can let the program assign the **Code** for the provider or you can enter a five-character code yourself. Enter the provider's name and pertinent information.

F1 Look up Provider Entry.

Setting up Patient Records

Click the Patient List speed button or go to the **Lists** menu and select **Patient List**. Click **New** or press **F8** to display the **Patient/Guarantor: (new)** window. Create a chart number yourself (eight alphanumeric characters) or let the program create one. Enter information in as many of the fields as necessary in both tabs. When finished, click **Save**. Repeat this process for each patient who visits your practice.

F1 Look up Patient Entry.

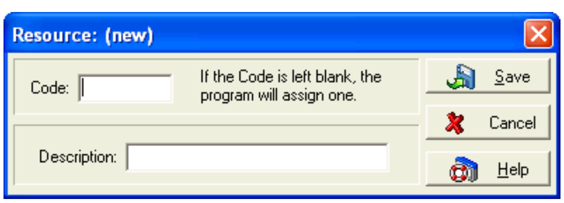
Setting up Case Records (Integrated only)

You can create case records in either Medisoft or Office Hours. Click the Patient List speed button and then choose the **Case** radio button in the top-right corner of the window. Then click **New Case** or press **F8** to display the **Case: Patient Name (new)** window. Enter information in as many of the fields as necessary. When finished, click **Save**. Repeat this process for each case you want to enter.

F1 Look up Case Entry.

Setting up Resource Records

The **Resource List** is a tool to help you manage the scheduling of rooms and equipment in the office. To create the list, click the Resource List speed button or go to the **Lists** menu and select **Resource List.** In the **Resource List** window, click **New** or press **F8**.



Create a code for the resource or let the program create one based on the description. Enter a description (e.g., Room 1, Treadmill, etc.) and click **Save**. Repeat this process until all rooms and/or equipment are contained in the list.

F1 Look up Resource Entry.

Multiple Booking Columns

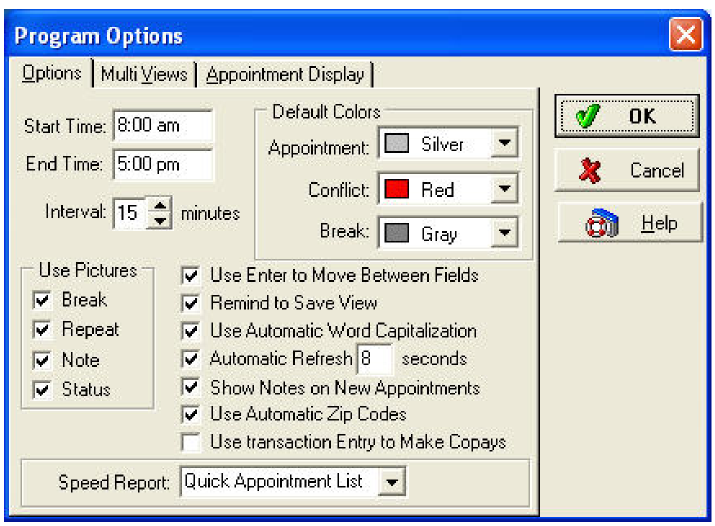
If you want to multi-book appointments (that is, schedule more than one patient in the same time slot), simply right-click the column heading in the appointment grid and the Speed menu will give you a choice of **Add Column** or **Delete Column**. If you add a column, the **Add Column** window has a horizontal scroll bar that lets you indicate the provider for whom you are adding a column. The number of columns determines how many appointments can be booked in one time slot for one provider. There is really no limit as to how many columns can be set up on the appointment grid. You can also edit the column display by selecting **Edit Column** in the Speed menu. Changes are made in the **Change Column** window.

F1 Look up Multiple Appointment Booking.

Program Options

▪ Appointment Length

Set the starting and ending appointment times for the practice. Enter the **Starting Time** and **Ending Time**, breaking it down by hour and minutes. Standard appointment **Intervals** can be established by scrolling with the up and down arrows.



You can also set colors to distinguish appointments, breaks, and conflicts. Make decisions concerning all the other default settings in this tab.

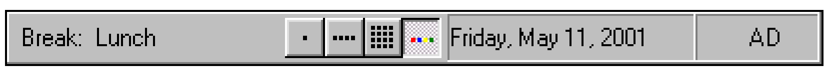
Designate one of the reports in the **Speed Report** box and it will automatically print when you click the Print speed button.

You can now choose to use Deposit Entry or Transaction Entry when entering a copay. To use Transaction Entry rather than Deposit Entry, click the **Use transaction Entry to Make Copays** check box. This is only available when Office Hours Professional is integrated with a version of Medisoft.

Views

One of the most important features of the Office Hours Professional program is the variety of ways you can display appointments/breaks in the appointment grid.

At the bottom of the main Office Hours window, in the Status bar, there are four View boxes, with different configurations of dot patterns. These give quick access to the same functions available through the **View** menu on the Menu bar. These correspond to Single Provider View, Week View, Month View, or any combination Multi View.



Day View

The Day View shows a single provider's appointments for a selected day. If multiple columns are set up, all columns are displayed. To display another provider's schedule, make a new selection in the provider box in the toolbar. This view does not show columns for resources, but columns can be added or removed as necessary in this view.

Week View

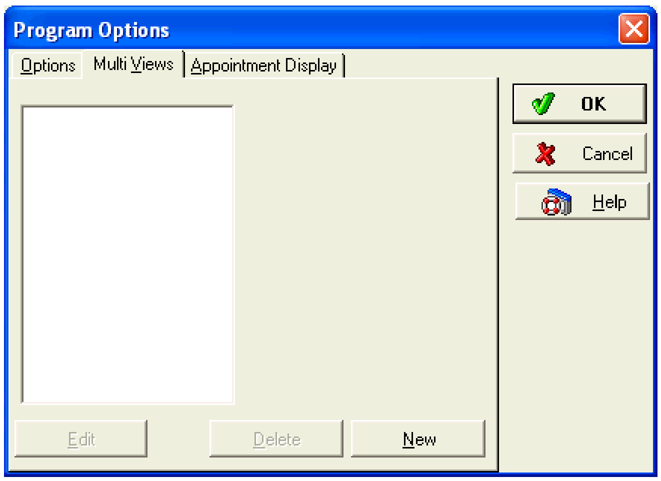
The Week View also shows only one provider's schedule, but with one column for each day of the week. If you have multiple appointments scheduled, the time slot will show the color for scheduling conflicts. You can size the columns to see all the appointments/breaks scheduled by placing the cursor on the right column heading boundary line until it takes the shape of a double-sided arrow, and then drag the boundary line right or left to increase or decrease the size of the column. Columns can be added or removed as necessary in this view.

Month View

The Month View shows up to 31 days, with the boxes colored where appointments have been scheduled. This is a single-provider view. The value of this view is that you can get a good overall view of which days are free for appointments or other scheduled items. Columns cannot be added or removed in the Month View.

Multi View/Multiple Provider/Resource View

The Multi View, or Multiple Provider/Resource View, is the most flexible. The program provides one Multi View setup, which automatically includes all providers and all resources, each with its own column. You can create as many Multi Views as you need in the Multi Views tab of **Program Options.**



The open data entry field lists all Multi Views that have been set up. This is where you can group providers and/or resources (rooms or facilities scheduled for appointments) in any combination desired, or modify or delete existing multiple view setups. Click **New** to set up a new Multi View (select a view and click **Edit** to make changes).

In the **New View** window, assign a name for the new view. For the first column, indicate the type (Provider or Resource), the **Code** (provider number or resource code), then the width of the column (in pixels). Set up each column you want in the view and click **Close** when finished.

If you want to add a column between columns that have already been created, place your cursor where you want the new column and click **Insert**.

These views can be also edited or reverted to default views through the **View** menu.

Appointment Display

In the Appointment Display tab of **Program Options**, you can specify up to five rows of information to display in the grid for an appointment. Be aware that the length of the appointment determines how much data is actually displayed on the grid. An appointment must be at least 75 minutes long to display five rows of information.

F1 Look up Program Options.

Setting Breaks

You can enter breaks into the appointment schedule as reminders that the time slots are committed. Some breaks are a one-time occurrence, like a vacation or a seminar. Others are regularly scheduled times for each month or week.

There are several ways to access the **New Break Entry** window. The quickest way is to click the Break Entry speed button. You can also click **New** or press **F8** in the **Break List** window.

To create a break, give it a name, a date, and enter the time that the break will start. Using the up and down arrows, enter the length of time in minutes. The display color of the break should be contrasting to the regular daily appointment schedule (the default is gray).

Indicate whether the break should display in all columns on the appointment grid. If not, click the **All Columns** box to uncheck it, and then mark those columns to be affected. Three radio buttons at the bottom of the window let you apply the break to the **Current** provider (the one whose schedule is on the window), **Some,** or **All** providers.

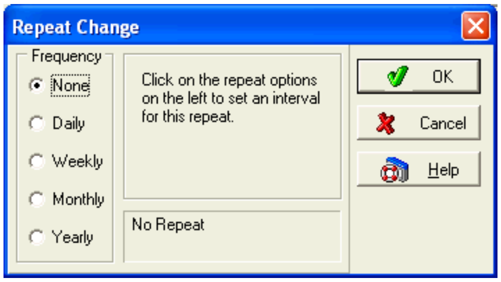
F1 Look up New Break Entry.

When used with Medisoft, users can set the permission levels (Level 1 through Level 5) for appointment breaks through the Medisoft Security Permissions window. Users can view and set new permissions and edit or delete permissions for the five levels of security.

The default setting for Appointment Breaks is the same as for Appointments. Refer to the Office Hours online help for instructions on changing permission levels in Medisoft.

Setting Up Repeating Breaks

In the **New Break Entry** window is a field marked **Repeat**, with a **Change** button. Clicking **Change** opens the **Repeat Change** window where you can establish the **Frequency** of the break.



Choosing any of the radio buttons (except **None**) displays different data entry boxes in the middle of the window that give you the repeat options for each frequency. Also, a written summary of the selected frequency appears in the bottom middle area of the box.

It is important to note that when you set up a break using the **Monthly** frequency, the date highlighted on the main calendar will have an effect on the day or date that is entered in the break note.

Security Setup

☞ Set up security at a time when no one else is using the program. After security levels have been established, the program must be closed and opened again before the feature is activated. Until the feature is activated, any user can change or alter any information contained in the program.

If you are using Office Hours Professional in connection with any Medisoft patient accounting program, the security settings established in the patient accounting program are applied to Office Hours Professional as well. However, you can make changes from within Office Hours if needed.

To set up security, go to the **File** menu and select **Security Setup**. The **Security Setup** window opens.

Click **New** or press **F8** to activate the **User Entry** window. Since the Security Supervisor has unlimited access and full control of security, set up that user first. Enter the Supervisor's **Login Name**, **Full Name**, **Password**, and **Access Level**. Be sure the Supervisor's access level is 1. Reenter the password. Since you are setting up the Supervisor record, you probably won't use the **Inactive** or **Expire Date** fields yet.

Open the Question tab. Apply a security question to help verify the user when he or she cannot remember the password. Click **Save**.

Each user can also be assigned to a group through Security Setup. Grouping users by job function or security level can help you easily assign tasks or send messages to a number of people at once. To create a group, select the **Group** tab in the **Security Setup** window. Click **New**. The **Security Group** window opens. Enter a **Group ID**, **Group Name**, and a brief **Description** so that one group can be easily distinguished from another. Click **Save**.

To assign a user to a group, click the **User** tab in the **Security Setup** window. Highlight a user's name. Click **Edit**, and then select the **Group** tab. Click the check-box next to the group you want to assign the user to. Click **Save**, then close the **Security Setup** window by clicking **Close**.

The Supervisor can then create/revise the rights of each level of security. Go to the **File** menu and select **Permissions** to open the **Medisoft Security Permissions** window.

Medisoft security consists of five levels of program rights and/or access. Each window within the program is listed in the **Window** section of the grid. A checkmark under a level heading means anyone with that level of security has the ability to perform that task and have access to that portion of the program.

It is the responsibility of the Supervisor to assign or remove rights for any level of security, with one exception. Level 1 access for the supervisor cannot be removed from any of the options listed in the **Security** window settings. Lower level access can be added, but the Supervisor must retain rights to these options.

Level 1 is for unlimited access and is designed to be used exclusively by the Supervisor or administrator to restrict access to the program. Levels 2, 3, 4, and 5 can be user-defined with the Supervisor deciding what fits in what level and assigning users accordingly. Generally, the higher the level number, the fewer rights are assigned to it. Add or remove checkmarks for level access by clicking the appropriate check box for each process displayed with each listed window name.

You can access the **Medisoft Security Permissions** window at any time to make changes. However, the program must be restarted on each computer before any changes become effective. After the permissions have been set up, the Supervisor needs to return to the **Security Setup** window and enter all other users, assigning each the correct level of security. Follow the same procedure as that used for setting up the Supervisor.

The **Inactive** field can be used to immediately block a user's access. The **Expire Date** field is useful for temporary employees.

Once you use the security feature, the **File** menu contains an additional option, **Log In As Another User**.

If a user attempts a task for which he or she does not have security clearance, a security warning displays. This security block can be temporarily overridden and someone with the proper clearance level can log in to give the first user the clearance to complete the task. Be sure to cancel the temporary override when the task is completed.

If desired, Level 1 users can also set up and apply the Global Login feature. The Global Login function provides an extra layer of security and added convenience for users that access multiple practices and applications. The Global Login features works with standard security to provide a path that determines what practices users can access. The feature utilizes standard security and permissions that determine what users can access or do in individual practices but then provides a method for users to logon once and then access all practices associated with the global user—essentially, once the feature is set up, a single user may access multiple practices without having to login to each dataset separately.

F1 Look up Security Setup.

F1 Look up Global Login Overview.

Setting Up Multiple Practices (Stand-Alone Only)

☞ If integrated, set up multiple practices in your Medisoft program.

When you set up a practice in Office Hours, the program assumes it is a single practice and sets up a default directory for the data within that practice. Each time you set up additional practices with totally unrelated patient files, different subdirectories are created. To set up a new practice, go to the **File** menu and select **New Practice**. This opens the **Create a New Set of Data** window. Type the information for the new practice in the window. It is not necessary to install the Office Hours program for each practice. If you set patient appointments for several practices, you can move freely from one data set to another by going to the **File** menu and selecting **Open Practice**. Then you can select the desired database from the list.

F1 Look up Setting Up Multiple Practices.

Chapter 3

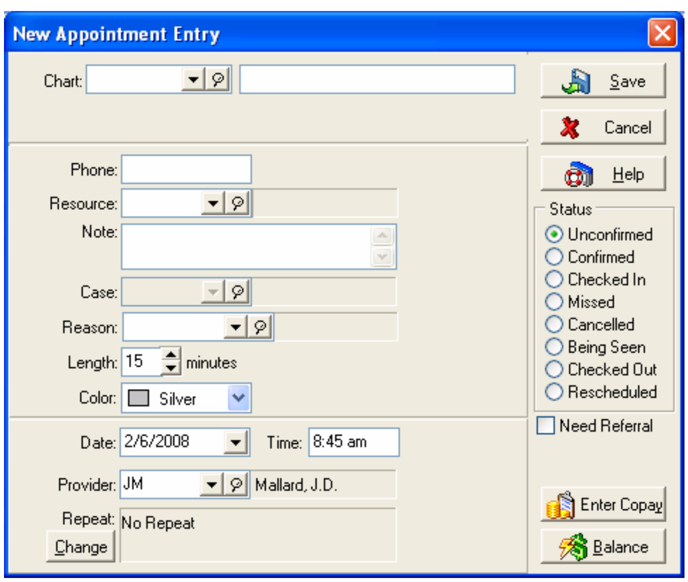
Using Office Hours Professional

Setting an Appointment

To set an appointment in Office Hours, first select the provider for whom you are scheduling. In the Day, Week, and Month views, the provider box at the top right of the toolbar has a drop-down box arrow. Select the provider you need, or press **F8** to set up a new provider record. In any Multi View, select the provider by clicking in the appropriate provider's column.

Select the date on which the appointment is to be set. You can use the **Day**, **Week**, **Month**, and **Year** selection arrows below the calendar to locate the correct date or use the Go to Date feature.

Next, in the appointment grid, double-click a time slot, which will be highlighted with a heavy line border. You can also click the New Appointment speed button; right-click in the time slot and select **New Appointment**; press **F8**; or go to the **Lists** menu and select **Appointment List**, then click **New** to open the **New Appointment Entry** window.



Enter or select the Chart Number of the person for whom the appointment is being set. If the person's information has been entered in the program, the name and phone number will be automatically entered and the patient's last case will be reflected in the **Case** field.

☞ If you are setting an appointment for a non-patient, skip the **Chart** field and enter the person's name in the **Name** field.

Assign a resource. If the resource or room you need is not in the list, press **F8** to create a new resource record. The **Notes** field lets you include a reminder message regarding the patient's need or condition. Enter an appointment reason in the **Reason** field. If necessary, change the **Length**, **Date**, and **Time** fields here. You can also change the appointment color. If there is a need for repeat visits, click **Change** in the **Repeat** section. See the **Repeating Appointments** section later in this chapter, page 21.

Select the correct status. Click the **Need Referral** box if applicable.

You can make a deposit entry directly from this screen if your Office Hours program is integrated with Medisoft Advanced or Network Professional. Click **Enter Copay**.

F1 Look up Appointment Entry.

Finding Available Appointment Space

To find an appointment slot that fits the time and length desired, go to the **Edit** menu and select **Find Open Time** or click the Search for Open Time Slot speed button. In the **Find Open Time** window, first enter the length of time for which you want to search. If you have a certain time frame in which you want to find an appointment, enter the **Start Time** and **End Time**. Check boxes let you indicate the day(s) of the week on which you want to find an appointment time. Then click **Search**.

If the time slot turned up is not sufficient or does not meet the patient's needs, select **Find Next Open Time** or click the Search Again speed button.

Locating a Future Date

There are times when the doctor wants to see the patient again in two weeks or another time in the future. The quickest and easiest way to get to that specific time is to click the Go to Date speed button.

In the **Go To Date** window, indicate the date from which you want to calculate the date in the future (e.g., last Friday). Then indicate the number of **Days**, **Weeks**, **Months**, and/or **Years** from that date. The entries can be cumulative. It is possible to enter one month, two weeks, and four days, if the goal date is 48 days away.

☞ You can also go backward through the calendar by entering negative numbers.

Repeating Appointments

When a patient needs to make regular return visits, set up repeat appointments through the **New Appointment Entry** window, if just setting up the appointment, or through the **Edit Appointment** window, if the appointment has already been set up and you need to add repeating appointments. Click **Change** in the **Repeat** section at the bottom of the window. The **Repeat Change** window that opens is the same window that appears when creating repeating breaks. See the **Setting Up Repeating Breaks** section in Chapter 2, page 14.

F1 Look up Repeating Event.

Viewing Future Appointments

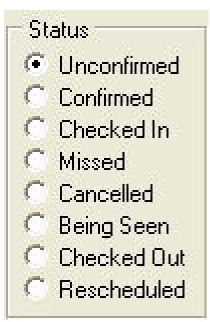
In Office Hours, you are now able to view all appointment scheduled for a patient. To view future appointments for a patient, right-click the patient's appointment in the appointment grid. Select **Future Appointments**. The **Future Appointment List** appears displaying all up-coming appointments scheduled for the selected patient.

F1 Look up Future Appointment List.

Changing or Deleting an Appointment

▪ Changing Appointment Status

There are multiple options for marking the status of an appointment.



The default is **Unconfirmed**. When any change in status occurs, edit the appointment or right-click on the appointment and choose the appropriate radio button. If you choose **Cancelled**, the appointment is removed from the grid display. Any other status is reflected by a small icon in the upper right corner of the appointment in the grid.

Moving an Appointment

If you want to move the appointment to another day or time, click the appointment and press **CTRL + X** (or go to the **Edit** menu and select **Cut**). Move the cursor to the new day and/or time slot, and either press **CTRL + V** or select **Paste** in the **Edit** menu. If you want to move the appointment to another time slot showing on the appointment grid (whether the same provider or not), click the appointment, hold the left mouse button down and drag the cursor to the desired time slot. Release the mouse button.

Rescheduling Appointments

Office Hours Professional provides users with an easy-to-use method for rescheduling appointments. Users can open an appointment and change the appointment status to rescheduled. The system then opens the Wait List. From the Wait List users can use the Find function to search for an open appointment based on selected Criteria.

To Reschedule an Appointment

1. On the **Appointment List** right-click the desired appointment to reschedule. The **Wait List** window appears. Go to step 4.

   -Or-

2. On the **Appointment** List double-click the desired appointment to reschedule. The **Edit Appointment** window appears.

3. On the **Edit Appointment** window from the **Status** panel, click the **Rescheduled** radio button. The **Confirm** window appears.

4. On the **Confirm** window click the **Yes** button. The **Wait List** window appears.

5. On the **Wait List** window click the **Find** button. The **Find Open Time** window appears.

6. On the **Find Open Time** window select/modify criteria for selecting a new appointment. Click the **Search** button. The **Confirm** window appears.

7. On the **Confirm** window click **Yes** to set the appointment or **No** to reject the appointment. Click **Retry** to for the next available appointment.

■ Deleting an Appointment

There are multiple ways to delete or remove an appointment: (1) click the appointment slot on the appointment grid and press **DELETE**; (2) highlight the appointment in the **Appointment List** and click **Delete**; or (3) right-click the appointment (either in the **Appointment List** window or on the appointment grid) and select **Delete** or **Delete item**, respectively. You can also edit the appointment and change the status to **Cancelled**.

F1 Look up Moving/Deleting an Appointment.

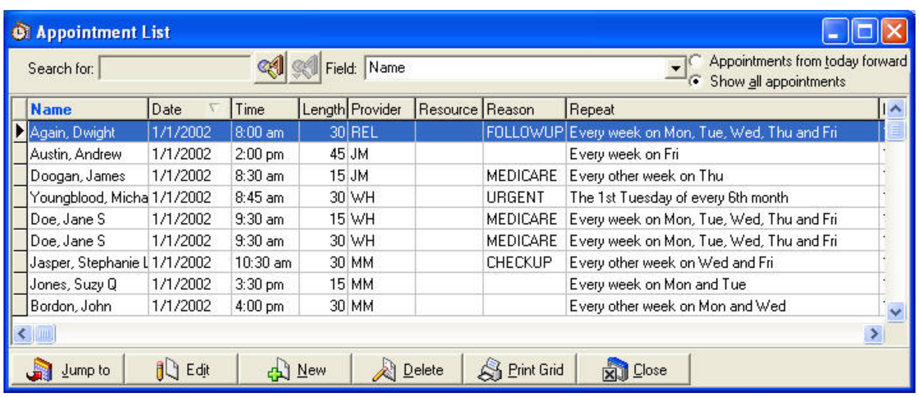
Patient Recall (Integrated only)

The program includes a complete patient recall system with a recall appointment list to assist in contacting patients to schedule appointment dates and times or to make reminder phone calls. This feature is available through both the Medisoft and Office Hours programs.

F1 Look up Patient Recall.

Finding an Existing Appointment

To search for an existing appointment, click the Appointment List speed button. The **Appointment List** appears. Use the **Search** and **Field** data fields to locate the patient for whom you are searching.



Entries within the parameters of your search are displayed in the window. As you highlight a patient name on the list, right-click to display a Speed menu that will let you **Edit Item**, enter a **New Item**, **Go to Item** (which takes you immediately to that patient's appointment), and **Delete Item**.

F1 Look up Printing the Appointment List.

Returning to the Current Date

If you need to get quickly back to today's appointment schedule, no matter where you are in the program, click the Go to Today speed button to bring you back to the current date.

Exiting Office Hours

Exit Office Hours by clicking the Exit speed button on the toolbar. This closes all the files opened by Office Hours and exits the program. Office Hours can also be exited by clicking the Close button (the third of the three small boxes in the upper right corner), by selecting **Exit** in the **File** Menu, or by pressing **ALT** + **X**.

If you don't want to close Office Hours, but want to work in another Windows-based program, you can minimize the Office Hours program by clicking the Minimize button (the first of three small boxes in the upper right corner of the window). "Minimize" means reducing Office Hours to a button on the Task bar.

Chapter 4

Reports

Appointment List

Probably the most important report printed in Office Hours is the Appointment Schedule, a listing of all the day's scheduled events. Generally, printing this report is the first order of business. Print the list and be sure you are ready to meet the day.

F1 Look up Printing the Appointment List.

Appointment Status

The Appointment Status Report shows all the appointments scheduled for a certain time period and their assigned statuses. It also displays a sum of how many appointments are assigned to each status. This report gives you an idea of how statuses are being used in your practice.

F1 Look up Appointment Status Report.

No-Show Report

Keeping track of patients who do not come in for their appointment can be almost as important as billing those who do. Following up on patients who do not show up for their appointments can show that you care about their condition. If the patient simply forgot the appointment, it can be rescheduled for a later time.

The No-Show Report, selected from the **Reports** menu, is compiled based on the use of the **Status** radio buttons in the appointment setup. If you don't update appointment status, the No-Show Report is not functional. This report can be limited by a specified range of dates and/or providers. It lists the patient, his or her phone number, Chart Number, appointment date and time, assigned resource, provider, and status.

F1 Look up No-Show Report.

Appointment Grid

When you print the appointment grid, the program gives you a hard copy of the current view in the Office Hours window.

As you go to the **Reports** menu, select **Print Appointment Grid**, and then choose if you want to see it **In Grid View** or **In List View**. The **Report Setup** window will open. After you set the report options, the program prints whatever view is currently displayed in the appointment grid.

F1 Look up Print Appointment Grid.

Print Superbills (Integrated only)

If you use Office Hours Professional integrated with any version of Medisoft, you can print superbills for the day through Office Hours. Go to the **Reports** menu and select **Print Superbills**.

F1 Look up Printing the Superbill.

Appointment Analysis by Provider

The Appointment Analysis by Provider summarizes the appointments and treatments by the practice, based on the provider. This report analyzes the revenue generated by each provider, how many patients each provider sees, etc.

F1 Look up Appointment Analysis by Provider Report.

Appointment Analysis by Reason

The Appointment Analysis by Reason report summarizes the appointments and treatments based on the Reason, with a sub list of providers who see patients for that Reason.

F1 Look up Appointment Analysis by Reason Report.

Templates

This report lists, by provider, the templates created, including the date, time, length and description, color selected, and repetition of the template. A template lets you isolate areas on the appointment grid for special reasons.

F1 Look up Printing the Template List.

Reasons

This report lists reason codes and descriptions, default length and the color designated on the appointment grid for the appointment and also for the template.

F1 Look up Printing the Reason List.

Waiting Appointments

The Wait List keeps track of patients by provider, the date entered, patient name and phone number, the reasons, and estimated length. It also shows the resource where the examination is scheduled to take place.

F1 Look up Printing the Waiting Appointments List.

Custom Report List (Integrated only)

Design capabilities in the program let you generate a variety of custom reports that meet the needs of your practice. Customized reports are accessed through the **Custom Report List** in the **Reports** menu. When you create a customized report, it is included in the Custom Report List.

F1 Look up Custom Report List.

Design Custom Reports and Bills (Integrated only)

The custom design capability lets you determine what data you want in the new report or bill and how it should be displayed. You have formatting power to decide on style and determine the layout and content display.

F1 Look up Design Custom Reports and Bills.

Load Saved Reports

This option lets you reopen reports that were prepared earlier and have been saved

F1 Look up Load Saved Reports.

Chapter 5

Miscellaneous

Office Messenger (Integrated with Medisoft Network Professional only)

Office Messenger is a simple way to send a quick message to someone else using the program. All you need to know is the name of the computer to which you want to send a message.

F1 Look up Medisoft Office Messenger.

System Information

In the **Tools** Menu, **System Information** lists operating systems, range of printers available, drive, CPU, and memory range.

File Maintenance

Within Office Hours, you can rebuild indexes, pack data, and purge Office Hours data. Each of these file management functions can take a long time to process. It is recommended that you do not perform File Maintenance functions during working hours, when your computer is needed for office management and accounting.

☞ If you are using Office Hours integrated with any Medisoft program, any file maintenance performed in Office Hours affects both the Office Hours and patient accounting programs.

Rebuild Indexes

The Rebuild Indexes tab lists those files which can be rebuilt. Select the file type you want to rebuild or click **All Files** to include them all.

Pack Data

Open the Pack Data tab to choose the type of files from which you want to remove data deleted from use in the program but not yet deleted from the files. Here again, you can choose one type of files or select **All Files** to include them all.

Purge Data

Purging a data file removes data records you no longer need. The decision to purge data files should be made only after careful consideration. You cannot access purged data unless you have a previous backup disk containing the files, but this will also replace all your program data files with the backup files. Be careful when purging data. You can purge appointments in the Appointment Grid or in the **Wait List**.

You cannot access data purged from the program.

Select the data to be removed by checking the appropriate check box, then entering a cutoff date. All data in the selected file(s) before and including the date specified will be deleted.

F1 Look up File Maintenance.

Appendix A

Where to Find Help with Office Hours

The Manual

Documentation Conventions

As steps required to use the program are explained, certain consistent instructions are given in the manual. Knowing these instructions will help you have a clearer understanding when they are used.

- **Buttons, Keys, and Title Designations**

  For identification purposes, all buttons, keys, menu selection options, windows, and fields mentioned in the manual are in bold print (**File** menu, **Program Options**, **Delete**).

- **Entering Information**

  When you are instructed to enter information, type the data, then press **ENTER**. For example, the instruction to "enter your name" means to type your name and press **ENTER**.

  When instructions say an entry can be alphanumeric, it can be letters, numbers, or a combination of both. In most cases, a chart number is alphanumeric, a combination of letters and numbers.

  When instructed to enter a date or phone number, use no punctuation. The program will supply the punctuation automatically. For dates, use the format of either MMDDYY or MMDDCCYY (for Medicare claims only).

Support Options

Technical help for learning and working with Office Hours is available in the following options: (1) **F1** key or **Help** buttons access online information while within the program; (2) accessing the Medisoft web site; (3) training options; (4) local Value-Added Resellers; and (5) telephone technical support. Support is unable to provide training on the telephone.

Using Online Help

No matter where you are in your Office Hours program, help is close at hand. If you don't understand what is wanted, or how data should be entered, press **F1**, click **Help** (if available), or click the Help speed button, and data files are opened. Specific information and examples of how data should be entered will be displayed in the Help window.

In addition, you can go to the **Help** menu and select **Table of Contents**. Highlighting any option in the Contents list will open the related help data fields.

Regardless of which of these entry points you utilize, you open the same Help files. Access the files in the manner most convenient to you.

Medisoft Web Site

The Knowledge Base is a searchable online database containing technical information relevant to the use of all Medisoft and related products. If you are working in a Medisoft program, access is made easy by going to the **Help** menu and selecting **Medisoft on the Web** or at the following web site:

http://www.medisoft.com/kb

When accessed, you can search for information concerning all Medisoft products or any particular product. All current technical information is contained in the Knowledge Base. For instructions on how to use the Knowledge Base, click Help on the left side of the Knowledge Base page.

Training Options

There are various training options available. Contact your sales representative at (800) 333-4747 or a local Value-Added Reseller for information concerning these options.

Local Value-Added Resellers

There are local Value-Added Resellers of Medisoft in your market area who are knowledgeable and efficient in selling, installing, troubleshooting, and supporting your Medisoft program. You can contact a sales representative for the name of a qualified Value-Added Reseller in your area to give you hands-on help.

Technical Support

Call Toll-Free (800) 334-4006. Get help when you need it with Technical Support services! Support is available to answer questions and assist in troubleshooting problems.

Support answers questions related to the operation of Medisoft software in a physician's office or a billing service. Support technicians are unable to assist with network configuration, computer hardware problems, or training on how to do medical billing. Support will provide software assistance to any customer, no matter where the program was purchased.

☞ Support is unable to provide training on the telephone.

When You Call Support

You'll get faster service if you have these items ready when you call Support:

- The Serial Number and registration information for your software.
- Your Medisoft customer number. This is found on the upper right corner of the invoice or packing slip that came with your program.
- A complete description of your problem or question, including the complete text of any error messages.
- A major credit card if your free support period has expired.
- It is usually necessary for you to be able to work on your computer while you are talking to the technical support staff, so be sure your phone is close to the computer.

Service Hours

Remember, Arizona doesn't change to daylight saving time. Year around support is available from 6:00 AM until 5:00 PM, Monday through Friday, Mountain Standard Time.

Updates and Changes

Go to the **Help** menu and select **Online Updates**. Any free update available will be downloaded to your system.

F1 Look up Online Updates.

There's a wealth of information on the Medisoft web page on the Internet. The web site address is **www.medisoft.com**.

Appendix B

Basic Navigation in the Manual and Program

How to Use the Manual

This manual is designed to give you an overview of what the program is and how it can work for you. It is not a complete how-to instruction manual. The detailed instructions are contained in the online Help files.

After a function or window is introduced in the manual, the **F1** symbol tells you there is online help concerning the topic. Press **F1** in the program and select the suggested topic. For example, the Setting an Appointment explanation in the manual briefly explains and shows the window, then instructs, "**F1** Look up New Appointment Entry." Rather than searching through the manual for additional help, press **F1** in the program, click **Search** (or press **ALT+S**); type "New Appointment Entry"; and press **ENTER** to go directly to the information specific to this procedure.

More information concerning the manual is contained in Appendix A, page 31.

Search

A search feature is included in many data fields, indicated by an icon that looks like a magnifying glass. Clicking the icon  opens a **Search** window that contains a list of the fields related to the data area of the program from which the feature was accessed.

F1 Look up Searching.

Data Entry Process

Entering data in the program is easy and straightforward. Select an option from the menus or click a speed button or icon. A data entry window for that function opens.

Buttons are placed in windows for easy editing and access. At the bottom of the **Patient List** window, for instance, are buttons for editing records, setting up new records, deleting records, or closing the window. Clicking **New** brings up a data entry window that lets you set up all of the information needed to create patient records, build patient ledgers and file claims, generate reports, and whatever else you need from your patient accounting program.

Data entered in a field is saved as it appears on the window. To correct data, just click in the desired field and the text in the field is selected. Typing new text with the text selected will change the existing text. Select a part of the text to replace just that part or to delete by pressing the **DELETE** key.

Keyboard Specifications

There are keys you will use in the program that control the data. By default, both the **ENTER** and **TAB** keys enter typed data into the program and move the cursor to the next field in the Tab order. If you want, you can deselect **ENTER** as a key which allows you to move forward through fields. Directional arrows let you move around the page to line up with the space desired.

Accelerator Keys

Any letter underlined on the Menu bar or in drop-down lists and in some windows indicates the presence of an accelerator key, a keyboard alternative to a mouse function. Using the **ALT** key in combination with the underlined letter key selects that option or moves the cursor to that field (such as **ALT+N** in list windows creates a new record). There are also accelerator keys that utilize the **ALT** and **SHIFT** keys in combination with another key (e.g., **CTRL** + **C** copies selected text).

Function Keys

Function keys provide shortcuts to various parts of the program. The keys are usually identified by the letter "F" followed by a number from 1 to 12 and many are assigned specific functions within the program. Most functions are consistent throughout the program, but there are a few variations. As you get acquainted with the program, you will find shortcuts will speed your data entry. Some that you will encounter are: **F1** (Help), **F3** (Save), **F6** (Search), **F8** (New or "add on the fly") and **F9** (Edit).

Appendix C

Glossary

Some of the words in this list may be familiar, but a common understanding of their meanings is helpful.

Abort — To discontinue or stop the current function or process.

Accelerator key — A shortcut key on the keyboard that can be pressed to perform a specific action. Usually the **ALT** key in combination with another key, but can also be a combination of the **CTRL** and/or **SHIFT** keys with another key. The underlined letter on menu items and field labels indicates an accelerator key that is available. Function keys are also considered accelerator keys.

Activate — To bring an application or document window to the foreground. If you are working in more than one application or more than one document with the active program, the active window is the window in which you are working.

Alphanumeric — Consisting of both letters and numbers and often other characters (such as a question mark).

Application menu — The main menu of the program; displayed in a horizontal format. Sometimes called the *operations menu* or the *Menu bar*.

Back up — Act of saving some or all of the data on a backup disk for safekeeping.

Bit map — Graphic image in a window or on a computer screen. Bit maps are made up of pixels. *See* Pixel.

Case — A grouping of claims usually with at least one thing in common, i.e., the same carrier, the same diagnosis, etc.

Chart Number — An eight-character control number to a patient's information.

Check box — A square box with associated text that represents a choice. When you select a choice, an X or check mark appears in the box to indicate that the choice is in effect.

Choose — To execute and complete a command. Some commands are executed when you select the menu command; others execute when you choose **OK** in a window or dialog box.

Click — To place the mouse pointer at the desired location and then quickly press and release the left mouse button once.

Close button — The button in the top right-hand corner of an active window which, when clicked, ends an activity and removes that window from the display. Closing a program window clears the immediate program in which you are working. *See* Exit.

Close— The button in many windows that closes the active window but not the program.

CMS — Centers for Medicare and Medicaid Services (formerly known as the Health Care Financing Administration – HCFA).

Control — A component of the user interface that allows the user to select choices or types of information, i.e., check box, entry field, radio button, etc.

Cursor — A movable object (such as the flashing underline or block) on the computer window that indicates the position where keyboard input will appear.

Default — A preset value in a field.

Diagnosis Code — One of the ICD-9 (International Classification of Diseases, 9th revision) codes used to identify a patient's condition. Established by the World Health Organization.

Dialog box — A moveable window containing controls that you use to provide information required to process a request.

Double-click — To place the mouse pointer at the desired location and then quickly press and release the left mouse button twice.

Drag — To place the mouse pointer on an item and, while holding down the left mouse button, move the pointer to the desired location and then release the mouse button to set the item in the new place.

Drop-down menu — A menu that emerges in a downward direction from a point or line at or near the top of the window. The series of menu levels displayed underneath the Menu bar are pull-down menus.

Edit control — The most common type of control for entering text.

Exit — An action that ends the active application and removes all windows associated with it. Usually click the Close button on the program Title bar. Many data windows also have **Exit** or **Cancel** buttons. *See* Close button.

Field — The space allowed on the window for entering data, usually labeled by a field name, e.g., "Code Name."

Filter — A procedure that reads data from the keyboard, modifies the data, and displays it on the window, i.e., you set conditions through the keyboard, the program searches the database for data that fits your conditions, and displays the result on the window.

Focus — The control or area of a window where user interaction is possible, where the data entry or action can occur or is occurring at a set point in time. A button that has the focus usually has a broken line box on the button. An edit control indicates that it has the focus by the blink caret (vertical cursor).

Folder — A container in which documents, program files, and other files are stored in the computer or on disk. Formerly referred to as a "directory."

Function keys — Keys usually identified by the letter "F" followed by a number from 1 to 12 which provide shortcuts to accessing various parts of the program.

Graying — A visual cue that a choice is not available at that time; a menu item or control is displayed in a gray color instead of black.

Highlight — Contrasting color or reverse video (light letters on dark background) indicating selection of a menu option or field in a window.

Hint — Brief summary of function displayed in a small yellow balloon when the mouse cursor is placed on an icon in the toolbar or on a field in a window. Hints are also displayed in text form in the Status bar at the bottom of the application window. Also known as a *ToolTip*.

Hotspot — A point of reference in a Help window that provides additional information concerning the picture, word, or group of words on which the cursor is resting. To signify that a hotspot is present, the cursor changes to look like a hand. Text that is linked to a hotspot is displayed in green.

Icon — *See* Speed button.

List box — A control that presents its data in a list format from which a user can make a choice. Normally a vertical roll bar appears on the right side of the list. Also known as a *scroll box*.

List window — A window unique to Medisoft programs which presents each record of the given data file in a list format. This window is also called a *browser* window, indicating that the data can easily be viewed and browsed through.

Maximize — To expand the active window to fill the entire window. The Maximize button is the middle of three buttons in the upper right corner of the Title bar.

Minimize — To reduce the program to a button on the Task bar. The Minimize button is the first of the buttons in the upper right corner of the Title bar.

Multi-booking — To schedule more than one patient appointment in the same time slot.

Operation — A function in the program which may be selected from a menu.

Operations menu — The main list of options in a program. Also known as the *Application menu* or *Menu bar*.

Procedure code — A CPT (Current Procedural Terminology) code established by the American Medical Association consisting of up to ten characters which identify a service provided to a patient. A charge is assigned to each procedure and is included with the code data. Procedure Codes are also used to record payments or adjustments to patient accounts.

Provider — Usually a doctor, but may also be an assistant or nurse who renders services.

Radio button — A circle with text beside it. Radio buttons are combined to show a user a fixed set of choices from which only one choice can be selected. The circle is partially filled when a choice is selected. Also sometimes referred to as an *option button*.

Right-click — To position the mouse pointer in the desired location and then click the right mouse button. This action displays speed menus.

Record pointer — The pointer on the left side of list windows that indicates the record selected.

Scroll — To move a display image vertically or horizontally that otherwise cannot be observed within the boundaries of the display window.

Select — To highlight or mark a section of text, menu name, command, dialog box option, or graphical object with the keyboard or with mouse actions.

Shortcut — A quicker, more direct method of doing something than the ordinary procedure; usually keystrokes as opposed to using the mouse.

Speed button — An image or picture displayed on a window to which the user can point to select a particular function or software application. Also known as an *icon.*

Speed menu — The menu that displays when the right mouse button is pressed, providing a quick and easy alternate way to execute certain commands. This menu normally duplicates functions that can be initiated in other ways.

Status bar — The gray bar across the bottom of an applications window which displays data and information pertaining to the field in which the user is working.

Submenu — A menu related to and reached from a main menu; a list of options within the application or operations menu.

Sub option — An option on a submenu.

System menu — A drop-down list that displays when the System Menu icon is selected (the upper left square in a window). Usually contains items such as **Restore**, **Move**, **Minimize**, **Maximize**, **Close**, **Switch To**.

Task bar — The bar at the bottom of the screen that contains the Start menu, as well as minimized buttons of any active program.

Title bar — The area at the top of each window which contains the window title and System menu icon. When appropriate, it also contains the Minimize, Maximize, and Close buttons.

Toggle — To switch between two options, such as showing hints or not showing hints.

Toolbar — The bar just below the Menu bar that usually contains icons or speed buttons to perform specific functions in the program. *See* Speed button.

Validation — A process used to detect input data in order to determine whether they are inaccurate, incomplete or reasonable.

Window — An area on the computer screen surrounded by a box which contains information for temporary use. Windows may be used to display information or to enter data. They may include search information, help text, notes, etc.

Windows Operating System — A graphical user interface developed by Microsoft Corporation wherein action is controlled by movement with a mouse or by clicking on icons.

Index