

SmartSeries Professional

In-Service

Smart Toolbox



Database Maintenance

Database maintenance has been expanded and moved to the ToolBox

Index process: It is now not necessary to Index daily. We suggest Indexing once a month routinely, or as required.

Note: If you encounter an error, Smart will force user out of the programme, then the user must Index.

Recalculate Balances- all Patients (Smart must be closed). Recalculate current patient still located within SmartSeries (Maintenance Menu)

Check Data Integrity-Index's programme first for the user and then runs utility

Adjust Over/ Under- PMT BG

New Utilities

Import Fees

Import Ref Practitioner from either our Web site or College of Physicians and Surgeons

Import new Explanatory codes from MSP

Note: YOU MUST BE USING WEB TRANSMIT to perform to use these utilities

Purge Data & Renumber Invoice numbers

SmartSeries Professional



New icon for SmartSeries Professional

For networks, each individual machine must have its own unique User ID.

New Database Tables & Pull-Down Menus

City & Province –Conversion of the most commonly used cities in your database, if there are spelling mistakes it is due to the original data entry done by the office.

Private Referrals

Account Group- Grouping practitioners by site for single databases

Patient relationships e.g. mom dad etc

Medication tables

Default Options

Account- default Insurer added

Item codes- default Item code

Patient Search

GST field

Fax number field

Web

Email

Search Methodology

Within any dialogue window that has a star (*), you can now click on the column header and search by typing directly into the column header with the criteria.

Example: In the patient list, you can search by last name, first name, alias, Birthdate, Phone #, Identity number or City, just by clicking on the header and typing in the information.

Interactive Messages

SmartSeries now provides prompts for certain functions which the user will have to read in order to proceed

OK and Cancel

Replaces Yes and No

Pop-Up Calendar

Double click on any date field and a calendar will pop up

3 Month Calendar

Mini Calendar- have to be using the daysheets

Short Cuts with Titles



Shortcuts have changed – Grouped by usage and modules
All short cuts have titles

Toolbars are movable

Referral Appointment Notification

Print from Shortcut

Account Options

Account Groupings

Default item code

Sort and print options

VCH tax codes for massage therapists earning over \$30,000.00

ICBC Supplier number

Current Patient Window

Point and click search i.e. click on PHN number tab, type the number in without the # or *.

Patient Registration:

New Dialogue window uses Tabs to move between demographic page, insurance page, health history etc.

Additional fields added in demographic information section

Demographics, Insurance information, health history, immunization records- all printable.

Referral Expiry date set for six months

Patient List Window

Search using columns with the star (*)

Search in descending order by clicking on the column header

Birthdate Search: mddyyy method. Enter numbers with no 0's, or slashes. Just enter the numbers directly. For example: January 1, 1945 is entered as 111945

Invoice List Window

New columns 'Ref by' and 'Ref to' don't have to bill separate invoice for a referral

Change of colour – red for outstanding invoices and white for paid

New tabs

Expanded Transaction history window

Original sequence # on rejections and electronic payments

Billing Checks

Smart checks for

Item code & birth date

Duplicate billing

Time & location dependant if the itemcode is set for these dependencies

WCB Billing

Add as many WCB Insurances for different types of WCB billings

Second field in Patient WCB insurance for patient injury information in order to differentiate between wcb claims

Add Employer through patient insurance information

Checks and balances throughout the entire billing process

Billing of forms is done the same way as in V3

Auto Payment and Refund Tracking

Updates existing payments during rebilling process – The process updates the existing non-electronic payments to match the new information including the insurance and the account. Works the same for unposted and posted payments. Also prompts the user with a message to indicate that the payment has been updated.

Report Options

Shortcut Icon or Pull down menu

Grouped (tab) by functionality

Editable Deposit Report

Editable Unposted Batch

Account Grouping

Floating printer Icon

Rejection Report now has sequence number

GST Collected

Invoice report can run reports for item codes and diagnostic codes

Export to Excel or Text file with Smart Office Tools Module

Recalls

Print Labels

New alarm feature (this is set in Default options – Miscellaneous)

Queries

Easy to use new Customized report feature

Back Up

New Directory
SSV40

Notes: