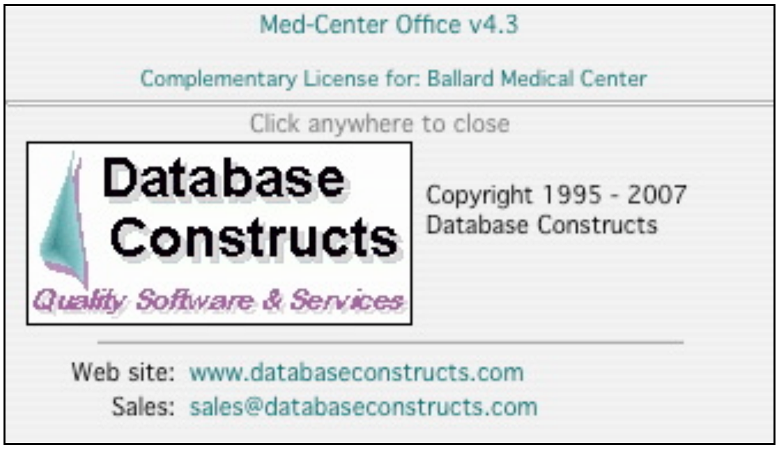
Med-Center Quick Start

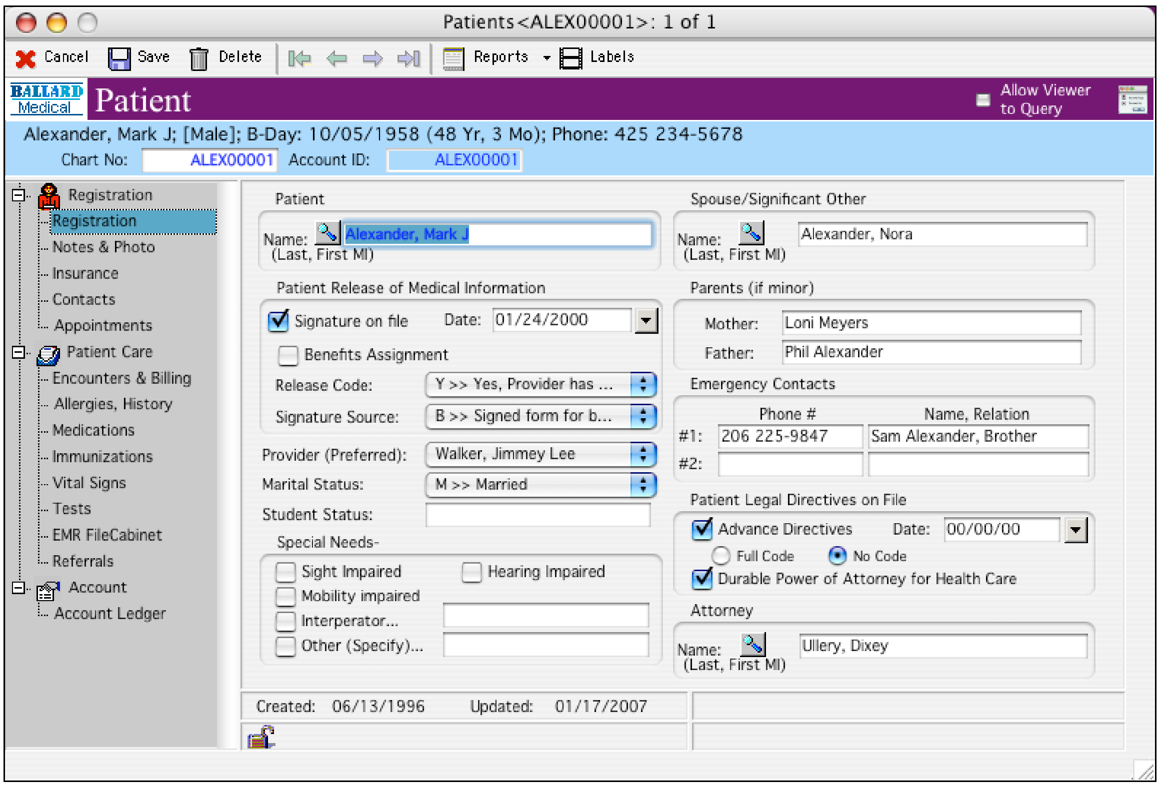


Contents

1 Introduction

Welcome to the Quick Start guide for the Med-Center practice management system. This guide covers the topics for individuals just getting started with Med-Center.

Med-Center was designed to be simple, yet powerful at the same time. Complex programs that can't be used except by computer specialists can be very unproductive in a hectic practice environment. It needs to be intuitive and easy to use, requiring minimal training and low cost administration. It also needs to meet the growing needs of the practice, in a powerful robust way.



Med-Center is available as two distinct products that allow it to be used in small single-user physician practices or in larger clinical settings. Functionality is identical between the two and contains technologies that allow easy migration from one to the other. Thus, a growing physician-run practice could easily upgrade to support multiple office staff without having to switch to another system. This quick start guide applies to both the single-user and client-server versions except where noted.

Windows and Macintosh versions of Med-Center operate identically as well. If a server version of Med-Center is installed (Windows or Macintosh), client connections can support both PCs and Macs on the network simultaneously. Med-Center manages these clients seamlessly while presenting the same information in the same way throughout the office. This quick start guide applies to both the Windows and Macintosh versions except where noted.

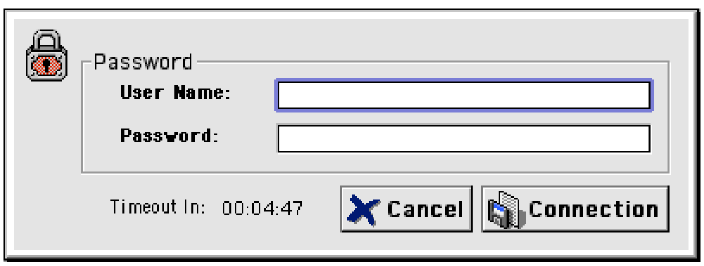
1.1 Installation and Start-up of Med-Center

Med-Center (both stand-alone and client/server versions) are available for download directly from Database Constructs web site (see www.databaseconstructs.com). Helpful technical notes and information is also available for download. The applications are distributed in a compressed format for easy expansion and installation on your personal computer (Windows or Macintosh) or office server.

For installation of the single-user version, double-click on the downloaded file. The file is self-extracting and will create a folder called "Med-Center Office" and place the application files within it. Starting the application is then accomplished by double clicking on the application file ("Med-Center.exe" for Windows, "Med-Center" for Macintosh. (Note that Windows systems may not show the .exe extension. If so, be sure and double click on file that is of the type "Application").

1.2 Login to Med-Center

Med-Center will present a login screen for entry of your User Name and Password. First time users can enter "administrator" with no password to log in (i.e., as downloaded from web site with the example database). You will want to change the administrator password at a later time to secure your practice information. If entry of the user name and password is not successful within the timeout period, Med-Center will automatically quit.

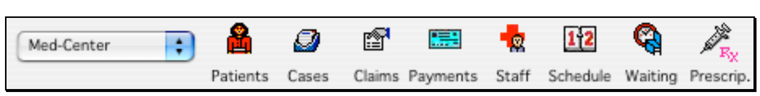


2 Using the Toolbar, Menu Items, and Buttons

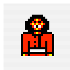
2.1 Toolbar & Relationship to Modules

The toolbar holds the module selector and icons used for access to module functions. To change to a different module, simply select the module name from the pop-up item list. Current modules include "Med-Center", "Accounting", "Records Manager", and "Administration".

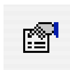
Med-Center Buttons:



The toolbar buttons available in the Med-Center module are covered below. In general, they bring up a list of the data from the tables they correspond to. Thus, to list all Patients, simply press the "Patients"  button. Once listed, double clicking on a patient will bring up the patient's record for review and editing.

 Patient– List of all patients

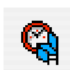
 Encounters – List of encounters for all patients

 Claims – List of submitted or pending claims

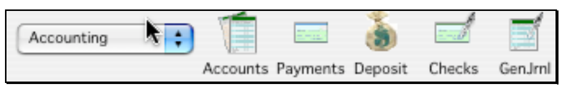
 Payments – List of payments received

 Staff – List of staff members

 Appointments / Scheduling – Appointments scheduled for doctors or clinicians

 Waiting Patients – Shows waiting patients for all clinic departments

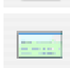
 Prescriptions – Prescription writing

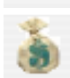
Accounting Buttons: 

The Accounting module records general ledger transactions between the user definable accounts. Accounts (as defined in the Chart of Accounts) can include: Accounts Receivable, bank or credit card accounts, asset or liability accounts, Accounts Payable, equity accounts, revenue accounts, and expense accounts. The accounting module is intimately linked with the Med-Center module so that Med-Center transactions are automatically posted to the accounting module.

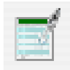
The toolbar buttons available in the Accounting module are covered below. In general, they allow display of the Chart of Accounts, and the means to post transactions to the accounts (i.e., Deposits, Payments, etc.).

 Accounts – List the Chart of Accounts

 Payments – List of payments

 Deposits – Make deposits to bank accounts

 Checks – Write/record checks



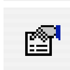
General Journal – Record a general journal transfer between accounts

Records Manager Buttons: 

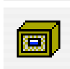
The Records Manager module is used to track and maintain other non-patient related records that are still critical to the management of the practice. This could include business finance records, litigation, tax information, and other vital records. In some circumstances, the scope of this job could become large enough to retain a certified records manager that understands the requirements for records retention and management.

The toolbar buttons available in the Records Manager module are covered below. In general, they bring up a list of the data from the tables they correspond to. Thus, to list all the Records, simply press the "Records"  button.

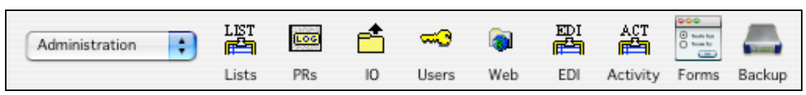
Records – List of documents under retention schedule control



Retention Schedule – List of retention schedule items

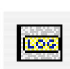


Filing System – List of file systems

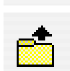
Administration Buttons: 

The toolbar buttons available in the Administration module are covered below. Administration functions are discussed in detail in the Administrator's guide.

Lists – List of list items (i.e., common text for pop-ups and pull-down menus)



Problem Reporting Log – List problem reports and resolution activity



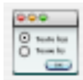
Import / Export of Tables and Lists – Import/Export functionality

Users and Groups – Definition of users, groups, and privileges

Web Server – Activate the web server for the Med-Center/Web add-on

EDI Segments – List of EDI segment definitions for electronic interchange

Activity Log – Record of changes for important tables (Accounts, Encounters, and Claims)


Form Customization Utility – Customize input forms and selected reports


Backup & Restore Utility – Backup and restore database

2.2 Standard Menu Items

The standard menu items allow application functions to be performed. In general, these functions are also available by selecting the icons as discussed in the previous section. In some cases, these functions apply to the front-most window being displayed. An example of this would be when a list of Encounters is being displayed and the "Custom Search…" menu item is selected. The custom search, when completed, would apply the search criteria to the displayed list.

File Menu –
File menu items address higher level activities for users of the database.

Preferences: Display or set program preferences
Open Database: Select other database set (not avail in client/server)

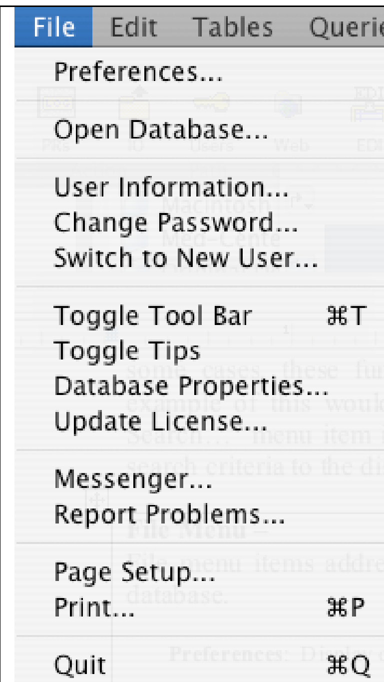
User Information: Allows current user to view/modify their staff info
Change Password: Change password used at login
Switch to New User: Prompt for login of different user

Toggle Tool Bar: Switches the tool bar on or off
Toggle Tips: Turns the help tips on or off
Database Properties: Displays summary of database information
Update License: Allows entry of license number for license expansion

Messenger: Messenger (Chat) system between logged in users
Report Problems: Allows submittal of problem reports to administration

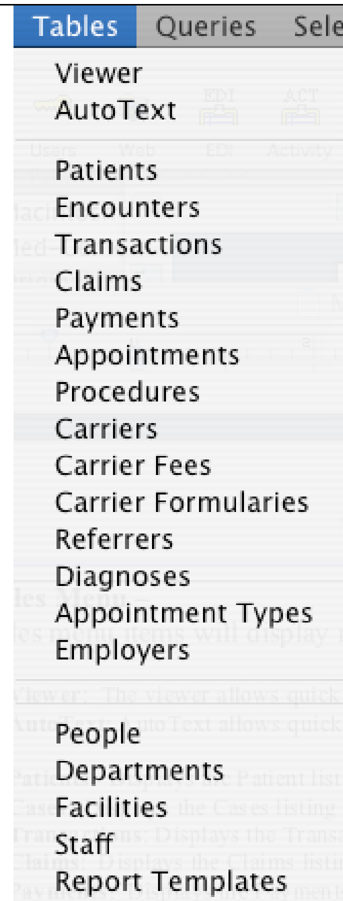
Page Setup: Displays Page Setup dialog
Print: Print the selected set of records

Quit: Terminate the session



Tables Menu –

Tables menu items will display records from the database.



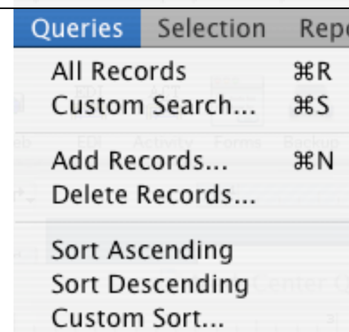
Viewer: The viewer allows quick selection of records for display/edit
AutoText: AutoText allows quick entry of text (for selected fields)

Patients: Displays the Patient listing
Encounters: Displays the Encounters listing
Transactions: Displays the Transactions listing
Claims: Displays the Claims listing
Payments: Displays the Payments listing
Appointments: Displays the Appointments listing
Procedures: Displays the Procedures listing
Carriers: Displays the Carriers listing
Carrier Fees: Displays the Carrier Fees listing
Carrier Formularies: Displays the Carrier Formularies listing
Referrers: Displays the Referrers listing
Diagnoses: Displays the Diagnoses listing
Appointment Types: Displays the Appointment Types listing
Employers: Displays the Employers listing

People: Displays the People listing
Departments: Displays the Departments listing
Facilities: Displays the Facilities listing
Staff: Displays the Staff listing
Report Templates: Displays the Report Templates listing

Queries Menu –

More properly, this set of menu items add, delete, sort and query the database and apply the action to the front-most window (set of records) being displayed.



All Records: Selects (and displays) all the records for the active window
Custom Search: Allows custom query (including complex searches)

Add Records: Add records in current table being displayed
Delete Records: Delete selected records in current table being displayed

Sort Ascending: Sort according to default sort key (ascending)
Sort Descending: Sort according to default sort key (descending)
Custom Sort: Define custom sort to apply to current table being displayed

Selection Menu –
These menu items control the selection of records for the current table being displayed. Complex queries can be combined with selection functions to obtain a multitude of desired record selections.

Show Selection: Highlighted records are shown in the selection
Omit Selection: Highlighted records are omitted from selection
Save Selection: Highlighted records (their pointers) are saved to disk
Load Selection: Highlighted records (their pointers) are loaded from disk

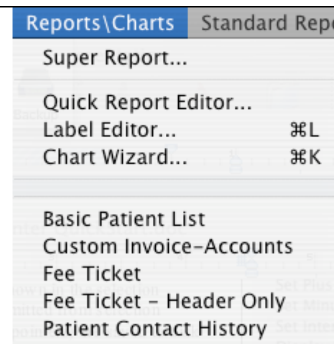
Store Set: Store the selection as a set in memory (buffer)
Set Plus Selection: Take set and add selection (Union)
Set Minus Selection: Take set and subtract any common items (Difference)
Set Intersect Selection: Take common records in set & selection (Intersect)
Display Set: Display the buffer set and make the current selection
Clear Set: Clear the set from the buffer

Reports\Charts Menu –
Reports, charts and custom reports are shown in this menu list.

Super Report: Calls SuperReport module for custom report definition

Quick Report Editor: Similar to SuperReports, but quicker/easier
Label Editor: Defines custom label layouts
Chart Wizard: Defines custom charts for plotting of data

** **Below the double line** – Super Reports that have been defined by users and apply to the current list of records



2.3 Standard Buttons

Standard buttons are used throughout the application to help provide a uniform easy-to-use interface. Some of the buttons have keyboard equivalents or Menu item equivalents.

List Header Buttons:

Input Header Buttons:

Cancel Modification of Record (**Shortcut**: Esc key on keyboard)

Validate Modification / Entry of Record (**Shortcut**: Enter key on keyboard). Note that holding the control key down while clicking on the save button will also save the record but will not automatically close the entry form.

Delete Record

First Record, Previous Record, Next Record, Last Record

Add Record(s) – Adds records

Delete Record(s) – Deletes records and related records if applicable

Custom Query (or Search) – Calls the custom query editor

Sort Ascending or Descending – Sorts up or down using the default sort field

Show Selection – Reduces the selection to the ones selected by the user

Omit Selection – Omits the user selected records from the selection

Print Selection – Prints the selection of records

Quick Report Editor – Calls the Quick Report Editor

Chart Wizard – Calls the Chart Wizard

Label Editor – Calls the Label Editor

Sub-Form Related Data: Usually seen on input forms where related data records are displayed.

Edit Related Record (also referred to as a “Drill-down” to related records)

Add Related Record

Delete Related Record

Stored Documents: Usually seen on input forms where Stored Documents can be accessed.

Open a file to store in the database as a Stored Document

Save a Stored Document to a file (on the users’ computer hard disk)

Delete a Stored Document from the database

Entry Fields, Pop-Ups, & Check Boxes: Usually on input forms where data entry is expected.

Data entry area (white background)

Designer — Data information area (non-enterable information from database)

Walker, Jimmey Lee — Pop-up item list

Checkbox item

Record Locking Indicator (Client/Server multi-user access): Located on input forms

Unlocked for editing

Locked by another user

2.4 Shortcuts and Tips

The "Escape" Key

The "Esc" key on the keyboard allows you to cancel the front-most window. It cancels the data entry modifications when modifying records and backs out one level when drilling down to related records. Use this key often when reviewing records with no intention of saving them.

The "Enter" Key

The "Enter" key on the keyboard allows you to save data entry modifications when modifying records.

The "Tab" Key

The "Tab" key will move to the next enterable field while entering data for a record. Holding down the "Shift" key and pressing "Tab" will reverse the movement to the previous enterable field.

The use of the "Double Click"

Double clicking on a record within a list or sub-form list will bring up that record and display it in a detail entry form. If privileges allow, the record can be edited and saved. If the record was listed in a sub-form list, the record will be displayed in a read-only mode. For editing of records listed in a sub-form list, click on the magnifying glass icon  if that option exists for that sub-form list. The "Double Click" is handy when used with the "Escape" key for quickly viewing data records and returning to a higher level without modifying the record.

2.5 Viewer

The “Viewer” allows quick selection of a patient and their encounters. The first few characters of the patient’s name can be entered and the first matching patient will be selected and their encounters displayed. Double clicking on either a patient or encounter will bring that individual’s information up in a separate window.

3 Example Database

An example database containing typical practice information has been included with the application. This allows new users to quickly explore the features and functions of the Med-Center system. When you are ready to use the system within your own practice, it is recommended that you start with the database set defined in the folder named "Med-Center_StarterDB" (This can be downloaded from the Database Constructs web site). Note that the supporting tables of information (i.e., Carriers, Carrier Fees, Carrier Formularies, Procedures, Diagnoses, and Employers will need to be created and tailored to your specific location and practice needs. This is discussed in more detail within the Administrator's guide.

4 Reference Documentation and Information

Other guides and reference information are available for Med-Center as follows:

- Quick Start Guide
- Administrator's Guide
- User's Guide
- Appendix A (4D Quick Reports, Labels, Graphs, & Backup)
- Appendix B (SuperReport Pro Users Guide)

Also, you might check the Database Constructs' web site periodically for newly released Med-Center versions and information:

- Database Constructs web site: see www.databaseconstructs.com
- Brochure of Med-Center features: www.databaseconstructs.com/productsservices/product.html
- Download page for application: www.databaseconstructs.com/downloads.html
- Complete documentation at: www.databaseconstructs.com/downloads.html