Eminance Training Guide

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Introduction

The Eminance training guide is designed to cover the essentials required for getting started. Covering these topics will ensure that you are able to start using the program immediately.

Eminance is a sophisticated program, offering a host of features, facilities and reporting for the modern day practice. Topics such as e-Link, CPD earning, SMS integration and EDI are not covered in this training guide, but are included in the reference manual, which is available in PDF format on the installation disk provided with the program.

We recommend a two-day training session on these topics on installation, which will ensure you are able to start working immediately. For a more in-depth insight into the program, please refer to the on-line manual, accessible from the Help menu.

This training guide is designed to cover the essentials to get you starting immediately. Refer to the on-line manual accessed from the Help menu for additional features.

Using the Help Files & Manual

Throughout the program, Eminance has context sensitive help. This means that help is relevant to the topic you are currently working on. To activate the help facility, press the f1 key. The help key can be activated at any time.

The on-line manual can also be viewed, searched or printed. The manual uses the Adobe PDF format. The installation disk contains the full reader installation. To activate the manual, click on the option from the Help menu.

Frequently Used Icons

Throughout the program, Eminance uses a standard set of icons to identify certain functions.

	Function	*Short-cut key*
	New	Ctrl + N
	Edit	Ctrl + E
	Delete	Ctrl + D
	View Only	Ctrl + V
	Find	Ctrl + F
	Advanced Search	Ctrl + A
	Refresh	Ctrl + R
	Exit	Ctrl + X
	Help	F1
	Search	Tab onto it and press enter
	Search	F2
	Edit patient file	Ctrl + P
	Enquiries	Ctrl +
	Allocations	Ctrl +

Patient File

This is an often-neglected area, where users rush to add the patient so they can see the practitioner, and end up leaving out vital information. Should the client not pay, certain information is going to be needed and this information should be in the patient file, e.g. ID numbers, physical addresses, etc. Another area neglected within this file, is the accuracy of information that is input, e.g. spelling, incomplete addresses, etc.

Adding the main member or person responsible for the account

- Click on the patient wizard.
- Click on the search (binoculars) icon next to the account field.
- Click on the new (blank page) icon
- Enter the Medical Aid using the search icon.
- Select the billing rate for the account.

- Click on the patient tab.
- Fill in the patients' details, such as name, address, medical aid number, etc.
- Click on the save icon
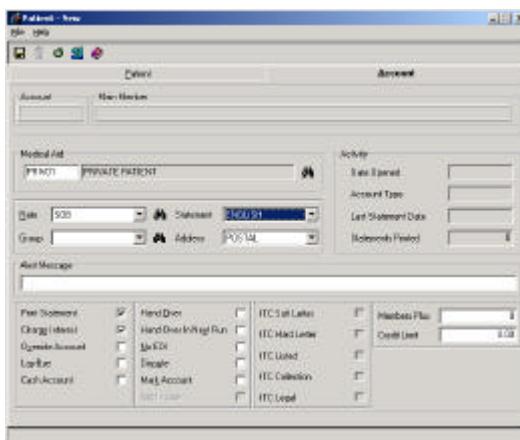
Adding a dependant

- Edit the main account once it has been saved.
- Alternatively use the edit patient icon after loading the patient into the patient wizard.

- From the patient

tab, click on the drop down box next to the patient field, and click on the 'add new dependant' option.

- Once the screen has cleared, add the information of the dependant and click on the save icon.
- Repeat this procedure for each dependant.
- Click on the refresh button ↻ if the new dependant doesn't show in the wizard.

Editing an existing patient

- Load the patient into the patient wizard.
- Click on the edit patient details icon .
- Make the necessary changes and click on the save icon.

Transactions – Medical

The invoice, quote and credit note screens all work in exactly the same manner, however there are buttons to convert a quote into an invoice, and an invoice into a credit note.

- Start by selecting the correct date, patient/dependant and treating practitioner.

- In the transaction grid, enter the procedure code into the procedure box and tab.
- If you do not know the code, click on the search button (three full stops), and search using the description.
- Double click on the correct code to return it back to the grid.
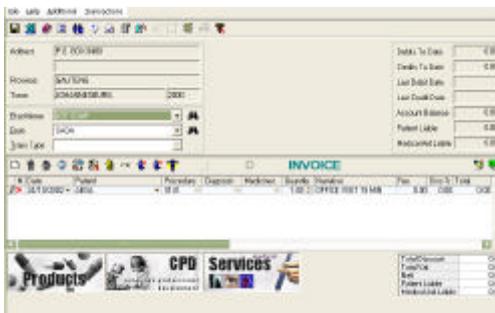
For materials, use the same method, but use the medicine box rather than the procedure box.

Remember to put each item on it's own line on the grid.

- For medicines, click on the scripts button.

- Enter the stock code, or use the search facility to search by narrative. There is a check box on this screen that allows you to filter for medicines based on the on-hand quantities.
- You may specify a repeat amount per line and well as overwrite the price should you wish to.
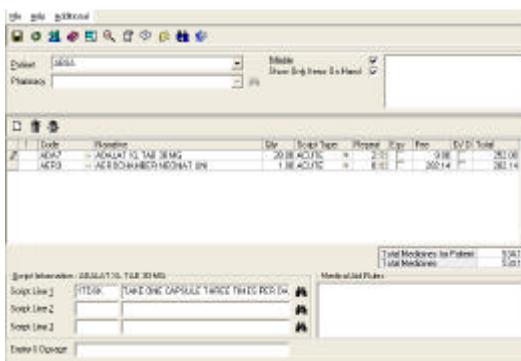
- If you print labels, then use the script information section to enter the dosage directions that should print on each label. These directions can be pre-defined per stock item in the stock file so that they appear automatically when dispensing.
- Once you have entered all your items and printed the necessary labels, click on the save icon and you will be returned to the invoicing grid.
- Click on the save icon in order to post the transactions you have entered.

Transactions – Optometry

The invoice, quote and credit note screens all work in exactly the same manner, however there are buttons to convert a quote into an invoice, and an invoice into a credit note.

- Start by selecting the correct date, patient/dependant, lab supplier, sales person and treating practitioner.
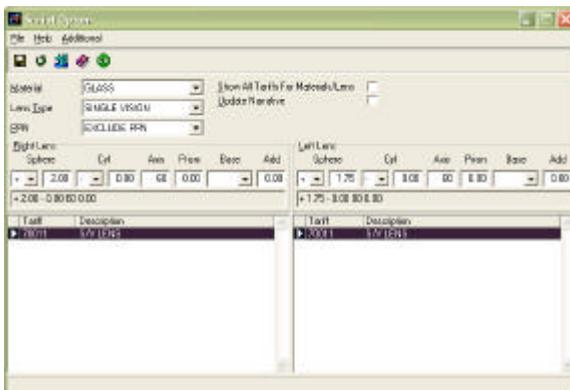
- Type the code into the tariff box or use the search button to search by description if necessary.

  Double click on the correct code to return to the invoicing grid.

- For scripting of lenses click on the prescription button.
- Select the material and lens type.
- Tab through to the script and enter the left and right scripts.
- Highlight the codes you would like to bill that fall within the script range.
- Click on the save button.
- You will be returned to the grid to continue invoicing.

Enter each new code on a separate line, using either the search facility or simply entering in the applicable code.
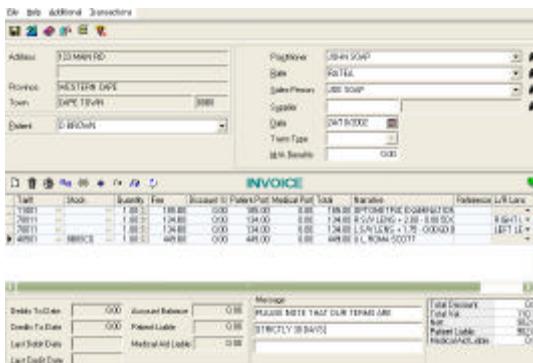
For stock items, either type the stock code in the stock box or use the

search button to look up the item using the description. Once all the codes have been posted, check your invoice message and make any adjustments if necessary.

- Click on the save icon to post the invoice.

Lab orders

Once you have saved the invoice, the lab order look up screen will appear.

Edit the applicable order and the edit lab order screen will appear;
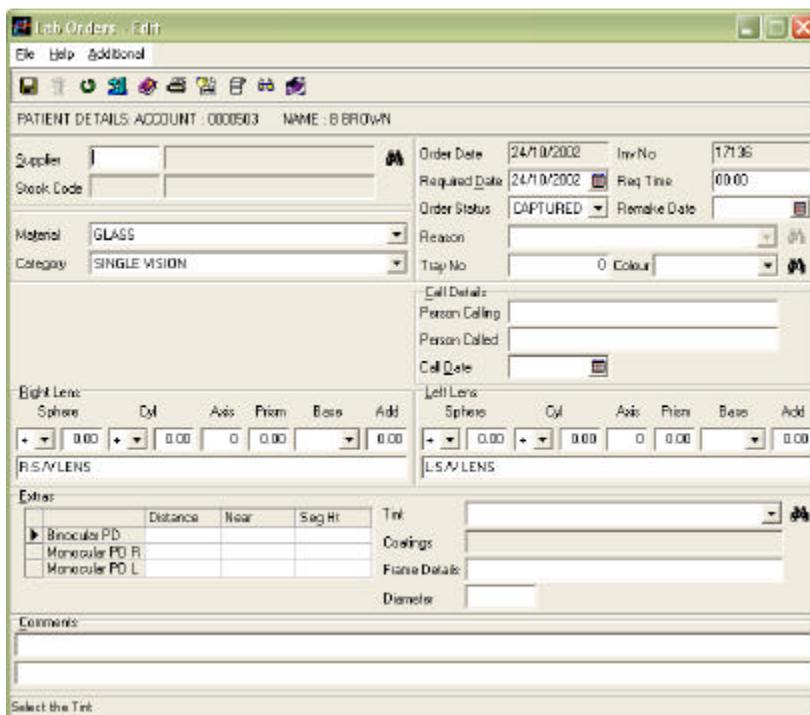
- You may now add the PD values, required date and time and any comments related to the lab job.
- Remember to check you have selected the correct lab supplier (company making the lenses.)
- From this screen you can print the lab order as well as any related labels.

- Click on the save icon when you are finished, and then on the exit icon to continue printing the invoice.

Transactions – Dental

The invoice, quote and credit note screens all work in exactly the same manner, however there are buttons to convert a quote into an invoice, and an invoice into a credit note.

Always make sure you have selected the correct treatment date, patient/dependant, lab supplier and treating practitioner on the invoice screen before starting to enter your codes.

Tooth chart and Quote/Treatment Plans

- From the patient wizard click on the tooth chart button.

- On the left hand panel click on the type of work to be recorded and or added to a treatment plan.
- Now click on the applicable tooth/teeth.
- Right click on each type you record on a tooth and select if it is work to be done, old work, defective work, etc.
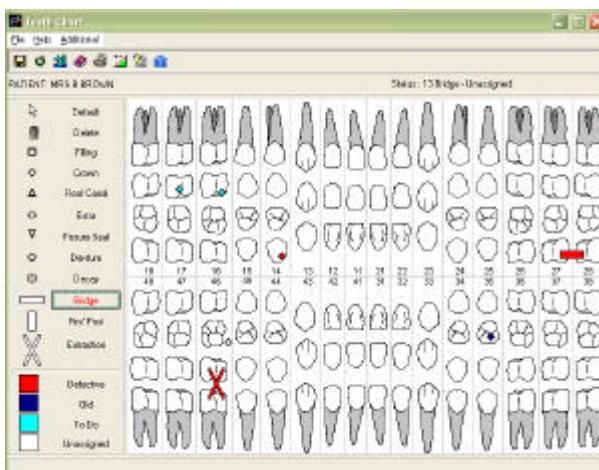
Items marked as 'to do' will automatically be added to the treatment plan window if the system has been set up correctly, i.e. if a crown consists of 5 tariff codes, by marking a crown as 'to do'

these 5 tariffs will appear in the treatment plan with the correct tooth number.

Invoicing and Converting a Quote to an Invoice

- To select these codes from your invoicing screen, click on the 'convert quote' button.

- Select those codes you would like to bill in the invoice by ticking the check box next to the applicable codes, and then on the save icon.
- The selected codes will be returned to the invoicing grid.
- You can also go straight to the invoice screen and post each individual code. Those tariffs requiring a tooth number will pop up with a box into which you can enter the tooth number.
- If this does not happen, then edit the applicable tariff and check the box that reads 'tooth number required'.

Lab slips

- Enter the lab slip tariff code (8099) into the procedure box on the grid. The lab slip screen will appear once you tab out of the procedure box.

- If this does not happen, then edit the 8099 tariff and check the box that reads 'lab order required'.
- Enter the lab slip number (invoice number from your lab provider).
- Enter the lab that supplied the service, using the binoculars to search by name if necessary.
- Enter the lab detail tariff codes line by line. The values of all of these codes will be the total value of the 8099 line on the invoice grid.

- Should you need to make a change to the lab slip detail before saving the invoice, then click on the edit button, make the necessary changes and click on the save icon to return the new information to the grid.

Payments

From this screen you have access to all
information you may need when making a

Payment

payment. You have an enquiries button, an allocations button, and
the financial details of the account.
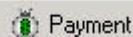
- From the wizard,
  click on the
  payment button.
- Select the
  correct date and
  transaction type,
  e.g. PD = cash
  payment.
- Enter the
  amount being
  paid.
- Make any changes to the narrative you might require.
- Click on the save icon.

Depending on your system settings, allocations will either happen
automatically, or you will be prompted to allocate manually.

Remember to always allocate to the exact treatments being paid to
avoid claiming the wrong transactions.

- Select the debit line you would like to allocate the credit to from
  the top panel.
- Double click on the credit in the bottom panel to allocate the full
  amount (or as much as possible) to that line.

Repeat until all the credits have been allocated.

🟢	This sign next to a debit or credit line indicates that it is partly paid or partly allocated.
✔	This sign next to a debit or credit line indicates that it is paid or allocated in full.

Allocating a specific amount to a debit line

- Click on the debit line you
  would like to allocate a
  portion of the credit to from
  the top panel.

- Enter the amounts you would
  like to allocate against the
  patient and medical aid portions using the boxes within the
  allocations tab.

- Now double click on the credit line you would like to use to pay
  those amounts from the bottom panel.

Always click on the save icon to exit the payment screen and save
your allocations.

Split Payments

Where your practice uses multiple practitioners, and you have
received one payment that covers transactions from more that one
doctor, Eminance will create a split payment. This means when you
try and allocate to a line belonging to a doctor other than the one you
are logged in as, the following message will appear:

*'The payment belongs to a different practitioner. A split payment will
be generated and it must then be allocated to the debit. Current
allocations will be saved. Do you want to continue?'*

Click on yes and allocate the remaining amounts.

Auto allocations

This tab can be found next to the portions tab on the allocations screen. Firstly you select whether the allocation should be to patient, medical aid or both portions. Secondly you select if the allocation should be to non-medicine items, medicines or both.

Next select the transaction date range to which the auto allocation should be made. Once you are happy with your selections, click on the save button (within this tab and not the main save button) to perform the allocations.

Click on save when you are finished and ready to exit the allocations screen.

You will note another tab, which reads auto allocate all. This option is used only in very special situations such as after a data conversion. Please do not use it unless you have been instructed to do so by a Health Focus staff member.

Un-allocating a payment

Double click on the debit line you would like to unallocate, and click on yes when the confirmation box appears.

If you cannot see the lines you would like to work with when entering the allocations screen, then click on the dropdown box next to the 'view' field and select the 'all' option.

Batch Payments

Batch payments afford you more control when posting medical aid remittances, than individual payments do. Some of the advantages are:

- Checks and balances to ensure you post the correct total cheque value.
- The ability to save halfway through and carry on at your convenience.
- The ability to post different transaction types within one batch, e.g. discounts, payments, refunds, etc.
- The ability to return to allocations at your convenience.
- The ability to print your batch payment.
- The ability to go back and view a batch once it is posted.

Adding a new batch payment

- From the main menu, click on Transactions | Batch payments.
- Click on the new icon
- Enter the date, Reference number (optional), and the narrative for the batch.
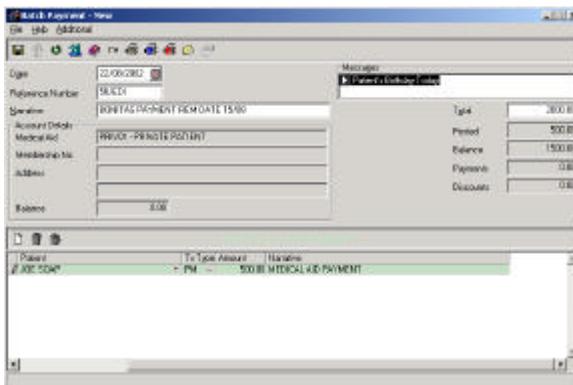
- Now start entering the payments as per the remittance advice from the medical aid.
- Once you are finished, the total amount of the cheque should equal the posted amount. If not, you may want to print the batch and compare it to your remittance.

- Should you have posted only a portion of the remittance, you may save and exit. When you are ready to carry on, you simply edit the batch and carry on from where you left off.

When you are complete, and the batch balances, you need to post those payments to the accounts. You do this by clicking on the post batch icon .

> *Depending on your system settings, allocations will either happen automatically, or you will be prompted to allocate manually.*

Completing your allocations after posting the batch

Once a batch has been posted you may not edit it, however you can view it.

- Highlight the batch you want to allocate.
- Click on the view icon .
- Click on the transaction line you last allocated successfully within the batch, and then click on the allocations icon.

The system will start with the highlighted account and work through the remainder of the batch in the same sequence as it appears on your screen

Correcting Transactions

One of the ways of correcting transactions is to post the opposite type of transaction, and then hide it. First make the payment and allocate it to the transactions. Both the payment (credit) and the transactions (debit) must have zero balances, otherwise they will not reflect in the hide transactions screen.

- From the patient wizard, click on the hide transactions button.
- A list of all the debits and credits that may be hidden on that account will show in the grid.
- Each one has a check box at the end of the line.
- Click in the check box for the lines you would like to hide.
- Remember you have to hide exactly the same value of debits to credits.

- Click on save.

If you have not hidden the same value in debits and credits, an error message will appear reading: debits do not match credits for hidden transactions.

Daybook

The daybook is a detailed audit trail of all transactions entered into your system since the last daybook print, or for a specific date.

- Click on Admin | Daily | Day Book
- Select whether you would like to print for the logged in practitioner or for all practitioners on the system.
- Select a sort by type.
- Click on Print.
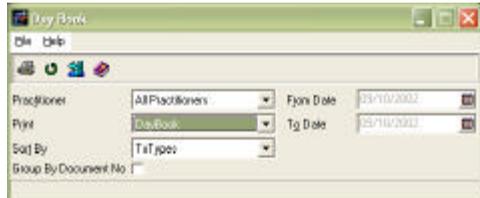
Reprinting a Daybook

- Select whether you would like to print for the logged in practitioner or for all practitioners on the system.
- Select reprint using the drop down box next to the field marked 'print'.
- Enter the date range for the reprint.
- Click on print.

Backup

You have to log into Eminance with the username Admin in order to perform this function. Make sure nobody is working in Eminance during the duration of the backup process.

- From the main menu click on the menus Daily | Admin | Backup | Full backup

You now have one of two options:

- *Local backup*
    - o Select local from the 'backup location' drop down box.
    - o Under 'Local path' enter the path were the database lies
    - o Click on the Go button.

- *Server backup*
    - o Select server from the 'backup location' drop down box.
    - o You will notice that 'Local path' is disabled. This is due to the fact that the backup will automatically be made in the same directory as the H2K.GDB
    - o Click on the Go button.

It is suggested that you install and use the GBAK Schedule, available on the installation disk and from our web site. It automates the backup procedure and ensures a consistent backup protocol.

Statements

- From the main menu, click on Admin | Statements

You can now either select or set-up a statement key, which will pre-determine, and remember, what you want printed, or you can simply specify what must print using the drop down boxes.

To create a statement key

- Click the search icon (binoculars) next to the statement key drop-down menu.
- Click on the new icon (blank page)

Filter Choice	Action & Result
Description	Type in a word that will enable you to identify the type of run that will be printed.
Age	What balances must print when this key is selected.
Sort By	Will determine in which order the statements will printed.
Rates Type	Which rates should be included in the statement run when this key is selected
Minimum Balance	If a patient has a balance less than the amount you specify here, the statement will not print.
Mark	If this is checked, then once you have printed the run, the account will be marked as printed. It will not print again in a statement run until the next month, unless you have posted new transactions, payments or journals, etc.
Print Disputed	If you have marked a patient account as disputed, and this box is left unchecked, then those accounts will not print.

- Once you have made your selections, click on the save icon (stiffy disk).
- Click on the exit button to return to the statement screen.
- Click on the print button

Repeat these steps until you have created a statement key for each type of statement run you would like to do.

If you edit a statement key after saving it, you will see that there a number of extra buttons available to you. Use these options to further filter which statements will be printed. These are:
- Medical Aid inclusions

- Medical Aid exclusions
- Account Group inclusions
- Account Group exclusions
- Administrator inclusions
- Administrator exclusions
- Rates to be printed
- Alternate Administrator inclusions
- Alternate Administrator exclusions

Once you have selected your filter, click on the Print button.

> *If an account is tagged as EDI active, then no statement will be printed. Under any other condition, if the patient has a balance on the account, a statement will be printed. A report exists allowing you to establish which accounts are tagged as EDI active, but which have not been submitted.*

Reports

Eminance provides a host of different reports. You need to study these reports and decide which ones you need to print and how often, in order to effectively manage your practice. In most cases, the only monthly reports that will be required would be your aged analysis and stock valuation. Check with your accountant or auditor as to which reports are required.

Reports | Barcode |

Age Analysis	*The bar code age analysis allows you to view the usage by date and age of the bar code that has been allocated and used.*
Barcode Audit	*Allows you to view all transactions for a date range for a specific bar code*
Cancelled	*This report allows you to enter a date range and will display all bar codes that have been tagged as cancelled.*
Missing	*This report is useful to locate bar codes, which are not being allocated to the system. Selecting this option will generate a missing bar code report.*
Bar code age analysis	*This report will list the stock code followed by the description, the bar code number and the age of the barcode in days.*
Missing Made Available	*Allows you to print a list of barcodes, which were marked as missing and have manually be change to the available status.*
Movement	*Allows you to view the movement for the specific barcodes. It indicates the bar code number the description the various financial information as well as the invoice, transaction type and date of movement.*
On Hand	*This report will list all of our codes that are on hand and available within the practice.*
Reserved	*A list of the reserve bar code, which are bar codes that cannot be invoiced out.*
Transactions	*This report will display all transactions linked to a specific barcode.*
Valuation	*The value of all stock on hand.*
Variations	*A report listing the difference between the barcodes actually counted and the physical stock on hand.*

Reports | Clinical |

Drug Schedule	Whenever a medicine is posted against the patients account and the drug schedule is four or higher the information is automatically written into this report
Master Diagnosis	Allows you to generate a wide variety of reports based on the ICD10 diagnosis, tariff diagnosis etc. You also have the option to report on the current date, or any date range you select. This information is extracted from the patient file.
Risk Management	Allows you to establish the element of risk based on a year and month period and alternatively for a medical aid, where the medical aid is tagged as a capped medical aid.
Tariff Movement	The tariff movement report will generate a summary listing of all tariff movements for the current month.
Transaction Diagnosis	Allows you to generate a diagnosis report based on transactions posted against the patients.
Treating Practitioner	Similar to the tariff movement report, but grouped by the treating practitioners, therefore including locums.

Reports | Creditors |

Age Analysis	This report allows you to generate a creditors age analysis. Which will generate a report showing the amount of money you owe your suppliers.
Terms	If you have activated your creditors for terms and limits this report would generate an age analysis of amounts due in terms of the creditors terms.
Vat	Vat report based on txtypes set-up.

Reports | Financial |

Age Analysis	This window allows you to produce an age analysis indicating the amounts that are owed to you in the various age divisions
Assistant Fees	This will generate a list of all assistant fee transaction lines, during the date range and for the practitioner specified.
Audit Trail	Whenever a transaction is posted to the database an audit trail is generated. This screen allows you to extract that information based on various filter criteria.
Cash Flow Analysis	This shows all payments received for a specific practitioner or group of practitioners as well as allowing you the facility to enter the accounting period.
Cashier Report	The cashier report displays all the payments a cashier has tendered. This allows full control of the cash receipts.
Control Totals	This report shows the financial status of the practice
Cost Centre	Each tariff code or stock code can be assigned a stock

	grouping, this report gives you a movement of all these stock groupings, allowing you to establish efficient sale items as well as slow movers.
Daily Invoice Listing	*This report allows you to print a list of all invoices generated for a specific day.*
Daily Turnover	*This reports lists the transactions by date, including credits and the amount of cash collected.*
Edi Claims Report	*Lists all accepted and rejected transactions, which have been claimed from the specified Edi provider.*
Gross Profit	*Where the results are based on the stock ID, the specific stock code, the practitioner, a year or a month period.*
Locum Transactions	*Allows you to generate a report based on all locums that have been used as the practitioner at the point of posting transactions on accessing this report; you can select the locum followed by the date range.*
Monthly Activity	*This report prints out all transactions for the month, or only those you request. E.g. receipts only*
Monthly Batch Payments	*Allows you to generate a report of all batches created in a specified date range. You have the option of grouping the report by narrative or by reference number*
Practice Statistics	*Allows you to view graphically certain information relative to the practice. A number of filters are allowed including the ability to view these statistics by practitioner, by year or by month.*
Revenue Statistics	*An indication of the financial integrity of the system and the transactions that have been posted throughout the system.*
Tariff Analysis	*The tariff analysis report gives you an indication of all movements that have taken place via the tariff code system.*
Tariff Rate Link	*This report will show all tariffs that are linked to a rate. This may be useful in generating a report, should you wish to change the tariff table, which will require the patient to be de-linked from the tariff type.*
Turnover	*Allows you to generate a turnover report for a specific practitioner or all practitioners on file by selecting that practitioner and entering the accounting period.*
Vat Report	*Detailed or summary Vat report based on either the invoice or receipt method as per your default settings.*

Reports | Medical Aid |

Age Analysis	*Allows you to generate a medical aid age analysis based on either the medical aid scheme or the administrator.*
Alternative Administrator	*Allows you to generate an age analysis if you are using the alternative medical aid administrator.*
Invoices	*Allows you to generate a list of invoices for a specific or all medical aids for a specific date.*
Medical Aid List	*The medical aid list will generate a listing of the EDI*

	provider and their unique activation codes for each fund, based on your selection.
Profiles	This report is an ideal report to identify those medical aids to which are most vulnerable to the practice and which have balances outstanding.
Patients	A report of all patients belonging to a specific fund, and their balances outstanding

Reports | Patient |

Average Patient Spend	Reports on the average value of each customer
Birthday List	Lists for the specific practitioner over a period of either a day or a month.
Diary Appointments	Lists the number of appointments made for each practitioner within a date range.
Due Dates	List of accounts with a due date within a specific date range
New Accounts	Allows you to list new accounts or new patients (dependants).
Number of Patients Seen Per Day	Allows a summary report per practitioner indicating the number or value of transactions for any specific date.
No Shows	Eminance can determine the patients that have been recalled and have not reacted to the recall. This is based on the date of the recall as opposed to the date of the last transaction. If the date of the last transaction is not greater than the date of the recall it indicates that the patient has not shown up. This report allows you to view those patients that have not shown and displays their details and their telephone number for contact on the screen.
Patient Address	Allows you to list all patients that are linked to a specific town and postal code.
Patient List	A list of accounts with telephone numbers and date last seen, where the results are based on a date range.
Patient Rate	Allows you to generate a list of all patients that are linked to a specific rate.
Patients Seen	Allows a list of patients, based on a date range, where the patient had lenses, contact lenses or frames billed to them.
Radiology Labels	This option will print the Radiology x-ray labels onto a pre-defined template.
Redundant Account	This option allows you to identify accounts that have had no transactions or movements, since a specified date.
Referred	This report will show you which patients were referred for a specified date range.
Script Items	Allows you to list all billed script items, non-billed script items or both on one report.
WCA Claims	This option allows you to create a WCA claims report.

Reports | Sales Person

Report	This report will give you either a detailed or summary of sales by sales person. This report is great for working out commissions.
Statistics	The sales person statistic form allows you to view the statistics for any particular sales person.

Reports | Stock |

Audit Trail	Enter a tariff and all transaction for a date range will print.
Gross Profit	Generate a report based on the stock ID, the specific stock code, the practitioner, a year or a month period
General Reports	This report allows you to print a general pricelist, stock take report, detailed and summary sales and stock valuation.
Reorder	Based on the minimum and maximum values in the stock files, you can generate a report showing what needs to be reordered.
Tag Report	This report allows you to generate a list of tags issued from the practice in the particular year or month
Frames Month To Date	This report allows you to view or print the frames sold to date.

Reports | Year To Date |

Analysis	This report shows you the total debits and credits for a specific tariff type posted between the date ranges that you have specified. This information can be extracted by a practitioner or for a complete practice.
Medical Aid Enquiry	This report shows transactions that are linked to a specific medical aid. Select the medical aid you require to evaluate and the relevant transaction links will be displayed along with an age analysis or transactions. Using the tabs you can swap between the current transactions as well as the document summary for the selected medical aid.
Practitioner Enquiry	This report shows all transactions based on your filters for a specific practitioner. Select the displayed practitioner and practitioner details and you can view the transactions in the current transactional document summary tab.
User Enquiry	This facility allows you to view which practitioner and user posted the applicable transaction.

Reports | Report Generator |

Labels	Allows label printing for these items based on a specified range
Table	Allows you to select specific tables from the database and to generate reports based on the information that has been selected.
Report Editor	The report editor allows you to create a report based on a SQL statement, to store that statement with a clear identifying name, and to generate results using that SQL statement.
Spool Printer	DOT MATRIX PRINTING ONLY. Allows you to print reports which you have spooled to a file rather than print initially.

Month End

Month end is run AFTER all the reports your
practice prints at month end have been
successfully printed.

- Click on Admin | Month End
- Click on the save button and the system will
  change over to the new financial period.

The month end screen will automatically close down when the month
end has been successfully completed.

Reporting automatically as part of the month end procedure

You can select certain
reports to print
automatically when you
start the month end
procedure. If you use a
dot matrix printer to print
your reports, then you
may spool these reports
to the spool printer and
print them at your convenience.

- Click on Utilities | System Defaults.
- Click on the month end tab
- Check the check boxes next to the reports you would like to
  print.
- Click next to the 'spool month end reports' only if you do not
  want to print them, and you would like to print them at a later
  stage.

Printing using the Spool Printer

Instead of printing month end reports before the month end
procedure, if you use a dot matrix printer to print your reports, then
you may spool these reports to the spool printer and print them at
your convenience.

- Click on Reports | Spool Printer
- The system will show you all reports that have not yet been printed. Should you wish to re-print a report, use the drop down box to select your printed reports.
- Check the reports you would like to print by clicking in the check box.
- Click on the print button.