Introduction

In this section of the Invoice Course, you will be familiarized with advanced Worklist features developed to take Invoicing to a whole new level. You will learn how to effectively utilize these available HVMS features to improve Invoice accuracy and Patient History search efficiency. These advanced Invoicing features will increase billing accuracy and practice profitability.

Learning Outcomes

- Navigate within the Worklist Patients Tab
- Operate the HVMS Patient History Feature within Worklist
- Operate the HVMS Rapid Billing Feature within Worklist
- Operate the HVMS Charge Feature within Worklist
- Operate the HVMS Activity Tab Feature within Worklist

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Content

1. Worklist Patients Tab – Contains Advanced billing features and Patient History Record features invaluable to efficient practice operation. The Patients Tab provides an efficient shortcut to view Patient History sorted by Patient Customer, Trainer, Boarding Location or Facility. The Patients Tab also contains the HVMS Rapid Billing feature and the HVMS Charge feature which provide extremely efficient methods of Invoicing.
Worklist Patients Tab

a. Worklist Navigation – Once loaded, the Worklist Patients Tab is separated into three sections; the Patient Directory, the Patient Toolbar and the Patient Display Screen.
   i. Worklist Patient Directory – The Patient Directory contains the available options that determine which Patients are displayed in the Patient Display Screen. Select the desired button to search all related records or select an option from the dropdown list.
      1. Customer Button – Used to select the Patient list displayed based on Customer. The Last 10 Customers selected will display in the Customer dropdown.
      2. Trainer Button – Used to select a Patient list displayed based on the Trainer assigned within HVMS. A list of all Trainers will be displayed in the Trainer dropdown, organized alphabetically.
      3. Boarding Location Button – Used to select a Patient list displayed based on the Boarding Location assigned within HVMS. A list of all Boarding Locations will be displayed in the Boarding Location dropdown, organized alphabetically.
4. Facility Button – Used to select a Patient list displayed based on the Facility assigned within HVMS. A list of all Facility Locations will be displayed in the Facility dropdown, organized alphabetically.

ii. Worklist Patient Toolbar – Contains the selected Patient Directory, the History Feature Button, the Rapid Billing Feature and the Charge Feature.
   2. Add New Patient Button – Used to create a new Patient Record and add that Patient to the current Directory Record.
   3. Find and Check In – Used to add an existing Patient to the current Directory.
   4. Move Patient Button – Used to transfer the Patient from one Boarding Location to another Boarding Location.

iii. Worklist Patient Display Section – Holds all related Patient and billing information. The Patient Display Section format will change based on the Patient Worklist function selected.
   1. Patient List – The HVMS History feature and Rapid Billing feature both display a Patient List on the left side of the Patient Display Section. This List contains the Patients within the selected Directory Record. Each Patient row will display the Patient Primary name and secondary name if one is available and the HVMS Patient ID number can be viewed from within the Patient name tooltip.
      a. Load Patient Record – The Patient Record can be loaded instantly by double clicking on the desired Patient name.
      b. Date – Displays the date that the Patient Record was created.
      c. Patient Owner – The Patient owner can be viewed by scrolling over the Owner icon within the Patient row. To open the Patient Owner, select the desired Owner icon. An Owner icon with a green background represents a Patient with split Ownership.
      d. Check Out Button – A Patient can be checked out of the current directory location by selecting the blue arrow icon. A confirmation popup will appear to confirm checkout before the action is completed.
e. Resize Patient Section – To resize the Patient Section, scroll over the right Patient Section window border until the double arrow is visible, hold and drag the board in either direction to adjust the size of the Patient Section.

2. History Button – The History Button allows rapid History Record retrieval for selected Patients. In History view, once a Patient is selected, the Patient History from the Patient History tab of the Patient Record will appear in the Display section. Similar options are available for record manipulation as in the Patient History Tab of the Patient Record.

   a. To search for a specific record by Record information, start typing the record information into the Patient History search field -> Matching results will be narrowed down and display in the Patient History columns. The Search field entered will remain active and still apply when switching between Patients until the search fields text is erased.

   b. To search for a specific inventory item within a record, select the Details button and start typing the record Information into the Patient History search field -> Matching results will be narrowed down and display in the Patient History columns. The Details Button will break down Invoice details to display each Inventory item as a bill.
entry on its own searchable line within the Patient History Tab. Select the Details Button again to remove the Detailed view.

c. To search for a specific record by record type, select the Filter button and select the desired Patient Record(s) from dropdown list → Matching results will be narrowed down and display in the Patient History columns.

d. To start a new record from the Patient History toolbar, select the New Entry dropdown Button and select one of the following options:
   i. New Note
   ii. New Record
   iii. Attach File
   iv. New Record File
   v. New Exam (Worksheet)
   vi. New Invoice
   vii. New Appointment

   → Once selected, a New Record popup window will appear to enter information.

e. To edit or view a Patient History entry, highlight the desired record and select the edit selected row button or double click on the desired record → The selected record will open in a new window to edit its information.

f. To delete a Patient History entry, highlight the desired record and select the delete button → A warning popup box will appear to confirm the record deletion. It is highly recommended against deleting a Patient Record from within the Patient History Tab. Once deleted, a record and all other linked Patient History Records will be permanently erased.

g. To print the current Patient History entry selected from the Patient History Tab, select the Print Entry Button → A print popup will appear to print the Patient History Record.

3. Rapid Button – The Rapid Button will load the Rapid Billing feature into the display section. Invoice Properties will be also appear in the toolbar section next to the Charge button. The Rapid Billing function is used to rapidly create one Invoice and then copy the exact Invoice over to multiple selected patients. This function is valuable for billing multiple Patients at the same location that have had the same procedure performed. Used properly, this function can immensely increase billing efficiency and consistency within a practice.
Patients Tab - Invoicing Worklist

- **Set Invoice Properties** – To begin Rapid Billing, ensure the correct Patient Directory is chosen and select the appropriate Invoice properties displayed in the Rapid Billing toolbar as you would for a regular Invoice.

- **Selecting Patients** – Once the Invoice properties have been set, select the desired Patients to apply the Invoices to by checking off their checkbox from within the Patient section.

- **Adding Charges** – Once the Patients have been selected, charges can be added to the invoice by selecting the Add Charge icon, the Administer button or the Dispense button. Invoice Inventory Item properties present have all the same functions as they do when using a traditional invoice.

- **Deleting Charges** – To delete a charge, highlight the desired Inventory Item and select the Delete button.

- **Service Date** – The Service Date can be changed from the Service Date dropdown which will display the selected Service Date.

- **Optional Rapid Billing Settings:**
i. Apply Discount Rules – When selected, this function will apply existing Customer and Patient Discount Rules to the Invoices created. It is advised to leave this checkbox activated to ensure preset Customer and Patient specific Discount rules get applied.

ii. Merge Into Existing Invoices – When selected, this function will apply the current charges to an existing In-Progress Invoice within the Patient account. Used properly, this feature can reduce the amount of Invoices a Customer receives per Patient when various procedures are performed at different times within a short time period.

iii. Always Create New Invoices – When selected, this function will always create a new Invoice for the Patients selected.

iv. Print Invoices – When selected, this function will print all Invoices created or merged when Rapid Billing complete.

v. Close Invoices – When selected, this function will set the new Invoice Status to Closed and apply the charges to the Customer account when Rapid Billing is complete.

vi. Remember Options – When selected, this function will apply the current Rapid Billing Options every time the Rapid Biller is used.

g. Cancel – To cancel the current Invoice sequence, select the Cancel button. All invoice items will be removed from the Rapid Biller.

h. Bill – To complete the current Invoice and copy it to all Patients chosen, select the Bill button. Any Customer or Patient Alerts present will be displayed in a notification popup.

4. Charge Button – The Charge Button will load the Charge feature into the display section. Invoice Properties will be also appear in the toolbar section next to the Charge button. The Charge function is used to rapidly create multiple Invoices with the same Invoice properties for different Patients with different charges. Each Inventory Item added to an Invoice must have its own Patient assigned. The list of available Patients is generated from the Directory displayed. This function is valuable for billing different procedures to different Patients at the same location on the fly.
a. Set Invoice Properties – To begin using Charge Billing, select the appropriate Invoice properties displayed in the Charge Billing toolbar as you would for a regular Invoice.
b. Adding a Patient – A Patient can be added to the invoice by selecting the Add Charge icon -> A Patient dropdown will be displayed with available Patients or the Patient name desired can be entered into the Patient field to search Patients within the selected Location.
c. Date – Used to set the service date of the charge.
d. Charge – Acts as a search field to enter the name of the desired Inventory Item. The Administer and Dispensed buttons are also now activated and can be used to add Inventory Items. Once a charge has been selected, another row will become available to add another Patient with a different charge. Invoice Inventory Item properties present have all the same functions as they do when using a traditional invoice.
e. Changing Invoice Properties – Any of the Invoice Properties can be changed between adding charges.
f. Deleting Charges – To delete a charge and its selected Patient, highlight the desired Inventory Item and select the Delete button.

g. Finish Sequence – When all charges have been completed, select the Finish Sequence button to apply the charges to the Patient account. If a Patient charged already has an existing In-Progress Invoice, the charges will automatically be added to the In-Progress Invoice. If a Patient charged does not have an existing In-Progress Invoice, a new Invoice will be created.

5. Worklist Activity Tab – The Worklist Activity Tab is used as a summary of the most recent Invoices created for a related Customer, Trainer, Boarding Location or Facility. The Activity Tab layout is similar to the Patient Tab layout and also provides advanced printing features. Before using the Activity feature, ensure the correct Directory is selected from the Activity Toolbar.

a. Filter Type – The Invoices displayed can be filtered by record type by selecting the Filter Type dropdown.

b. Filter Status – The Invoices can also be filtered by Record Status by selecting the Filter Status dropdown.
i. Select All – Used to select all Worksheet, Invoice and Appointment Status settings available.

ii. Select None – Used to deselect all Worksheet, Invoice and Appointment Status settings available.

c. Patient Directory Selected – The selected Patient Directory and Directory Type will be displayed on the Directory Button. Select the Directory Button to display the related Record.

d. Add New Patient Button – Used to create a new Patient Record and add that Patient to the current Directory Record.

e. Find and Check In – Used to add an existing Patient to the current Directory.

f. Open Record – Used to open the highlighted Invoice.

g. Print – Used to Print the selected records with checkboxes checked. This function is useful for printing selected Invoices by Trainer, Boarding Location and Boarding Facility.
Glossary

**Worklist Patients Tab** – Contains Advanced billing features and Patient History Record features invaluable to efficient practice operation. The Patients Tab provides an efficient shortcut to view Patient History sorted by Patient Customer, Trainer, Boarding Location or Facility. The Patients Tab also contains the HVMS Rapid Billing feature and the HVMS Charge feature which provide extremely efficient methods of Invoicing.

**History Button** – Located within the Patient Tab of the Worklist Module. The History Button allows rapid History Record retrieval for selected Patients. In History view, once a Patient is selected, the Patient History from the Patient History tab of the Patient Record will appear in the Display section.

**Rapid Button** – Located within the Patient Tab of the Worklist Module. The Rapid Button will load the Rapid Billing feature into the display section. Invoice Properties will be also appear in the toolbar section next to the Charge button. The Rapid Billing function is used to rapidly create one Invoice and then copy the exact Invoice over to multiple selected patients. This function is valuable for billing multiple Patients at the same location that have had the same procedure performed. Used properly, this function can immensely increase billing efficiency and consistency within a practice.

**Charge Button** – Located within the Patient Tab of the Worklist Module. The Charge Button will load the Charge feature into the display section. Invoice Properties will be also appear in the toolbar section next to the Charge button. The Charge function is used to rapidly create multiple Invoices with the same Invoice properties for different Patients with different charges. Each Inventory Item added to an Invoice must have its own Patient assigned. The list of available Patients is generated from the Directory displayed. This function is valuable for billing different procedures to different Patients at the same location on the fly.

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