Clinix
An ECI Healthcare Partner

Navigating through ClinixPM

Module 1

Table of Contents

Logging into ClinixPM 3
ClinixPM Home Page Overview 6
Overview of the ClinixPM screens 9
- Task Bar Icons 9
- Master Menu: 11
- Sub Menus: 12
- Patient Account Screen: MM7 13
- Tabs: 18
- Moving field to field: 18

Searching for data using the Query feature 19
Query within a Query 21
- ClinixPM 'Query within a Query' Example 1: 21
- ClinixPM 'Query within a Query' Example 2: 24

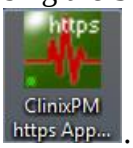
ClinixPM Wildcard 25
- The Different Types of Lookups 28
- The first type of ClinixPM lookup: 1. List of Values (LOV) 28
- The second type of ClinixPM lookup: 2. Master Table Lookup 30

Sticky Cursors 31
Help Messages 33
Logging Out of ClinixPM 36

Logging into ClinixPM

Users are able to connect to ClinixPM using the Secure Web Access method or using the Virtual Private Network (VPN) method.

To launch the ClinixPM Program using the Secure Web Access (Https)



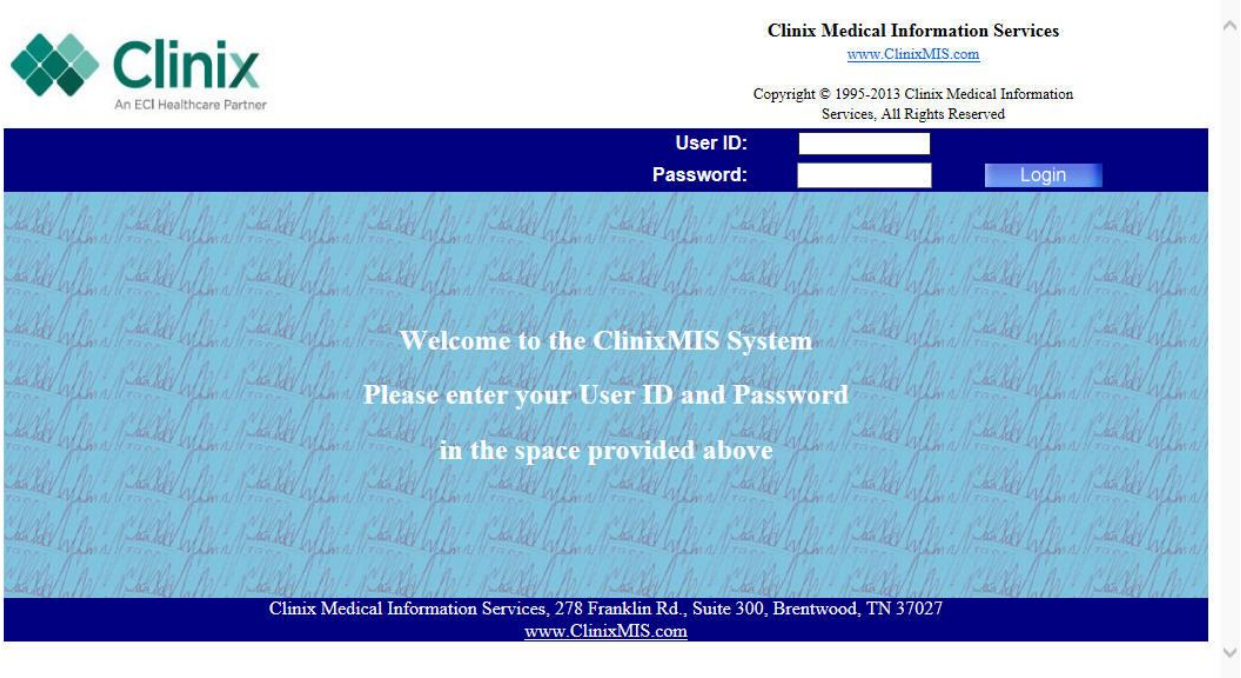
The ClinixPM HTTPS Sign- On screen will request your username, enter and then select 'Submit'.

The Oracle Access Manager will display, enter your username and password, then select 'Login'.

If your workstation is connected with a Virtual Private Network or VPN, use this icon

This is the first login screen to ClinixPM. Typically, you will only see this screen the very first time you log in. However, if you share a computer with another user you will see this every time you log in.

This login screen will identify a specific user as the user of the computer.

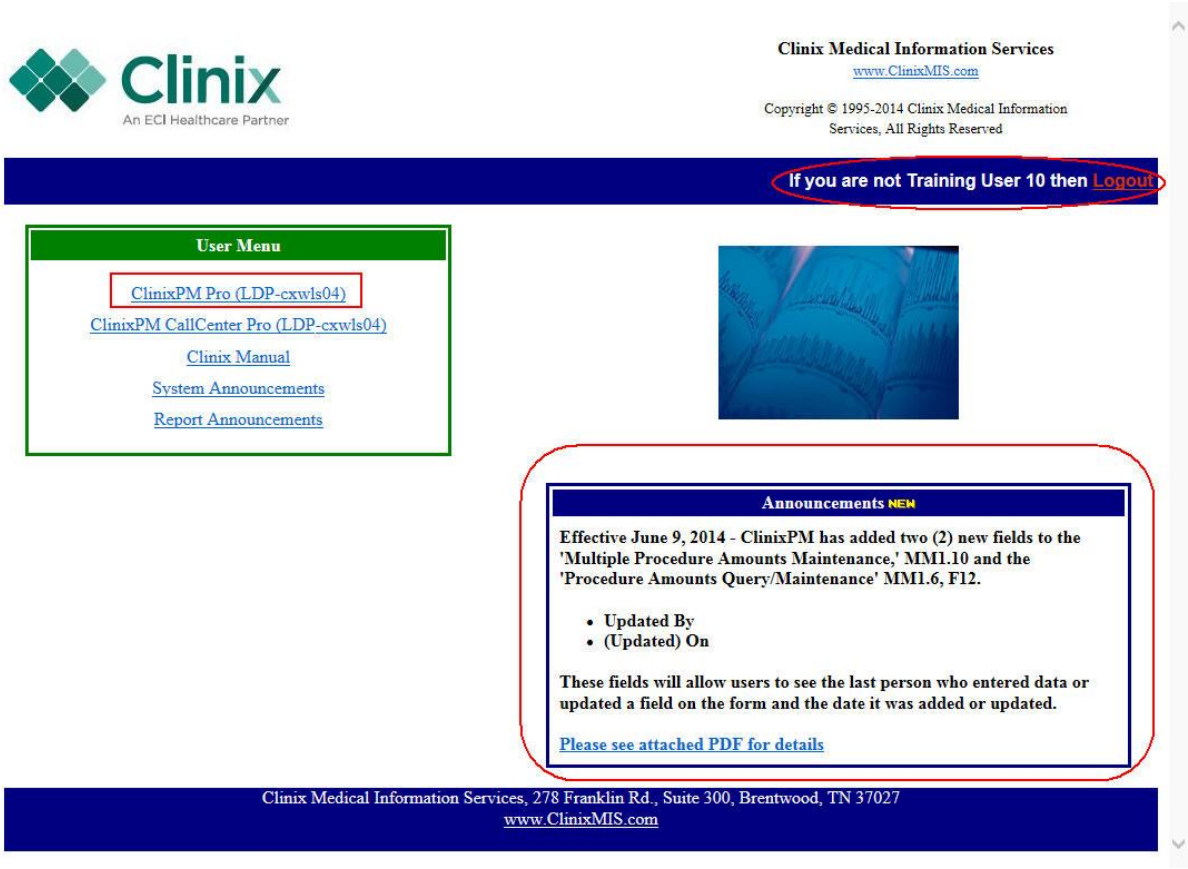


- Enter your User ID
- Select the <Tab> key or use your mouse to click in the 'Password' field
- Enter your Password
- Select the <Enter> key or use your mouse to click on the 'Login' button.

**If you don't remember your User ID and password, please contact your Client Manager for assistance.

ClinixPM Home Page Overview

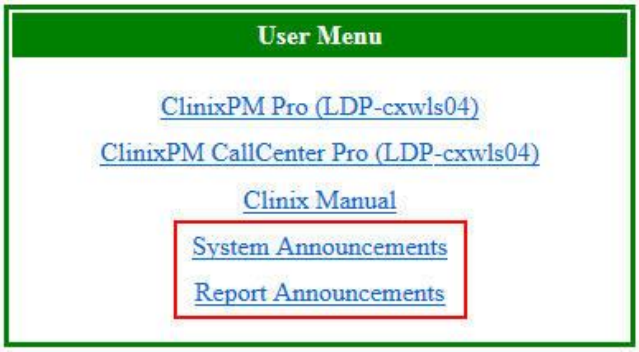
The screen below is the ClinixPM Home Page. You will see this every time you log into ClinixPM.



- **Name Display**

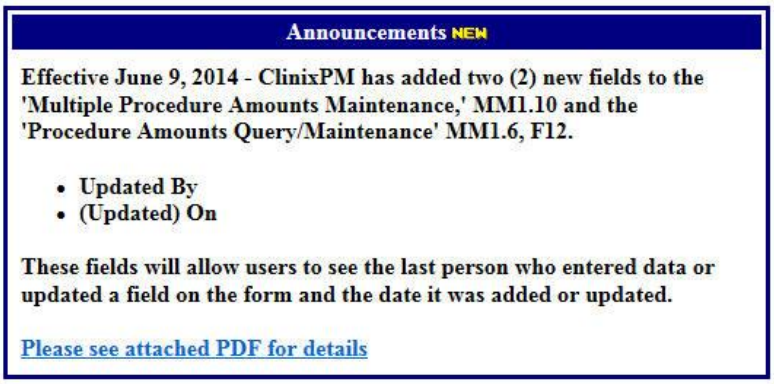
  - The user's name that is logged into the computer you are using will display in the blue banner.
  - If someone else needs to use the computer, they should select 'Logout' and enter their User ID and password as shown on page 3.

- **User Menu**



- This gives users the ability to select different links into the ClinixPM System
  - **Clinix Application** will take users directly into the system
  - **Clinix Call Center** will take users who are associated with a billing company into a screen that allows them to search for patients, regardless of which database they are in
  - **System Announcements** will take users into an area that will allow them to search and read any system announcements that have been sent out detailing any enhancements that have been made to the system
    - The announcements will also be emailed to specific users
  - **Report Announcements** will take users into an area that will allow them to search and read any report announcements that have been sent out detailing any new or changed reports
    - The announcements will also be emailed to specific users

- **Announcements**



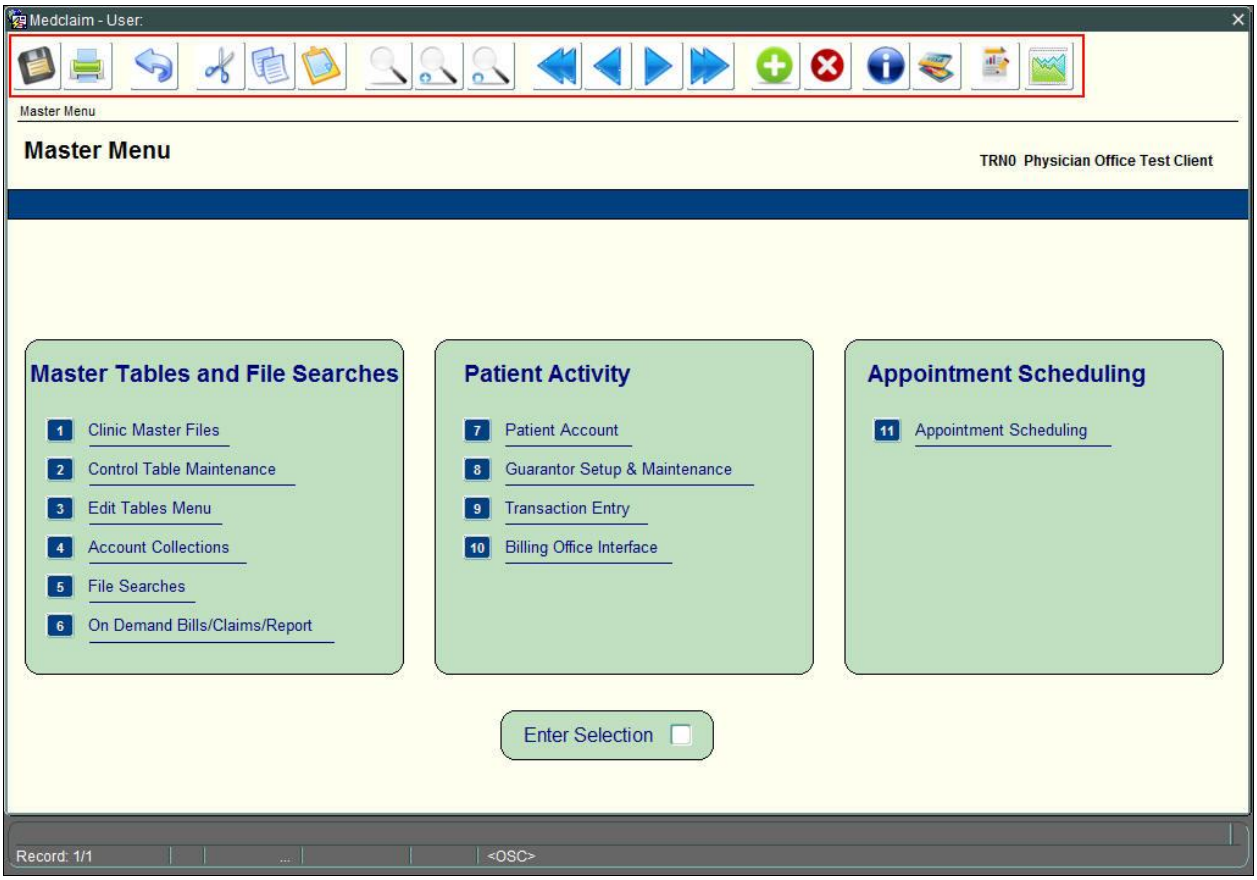
  - This section will rotate or 'flash' specific system and report announcements

After selecting the 'Clinix Application' link mentioned previously, you will see a second login screen. This login advises the system of restrictions that might be set up with your specific userid.

- Enter your User ID
- Select the <Tab> key or use your mouse to click in the 'Password' field
- Enter your Password
- Select the <Enter> key or use your mouse to click on the 'Login' button

Overview of the ClinixPM screens

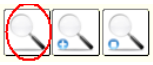
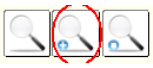
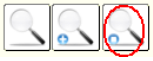
Task Bar Icons:



When Navigating in ClinixPM you can use the mouse to point and click on the Task Bar Icons or use the keyboard function keys. The icons and their functions are universal throughout the entire ClinixPM system.

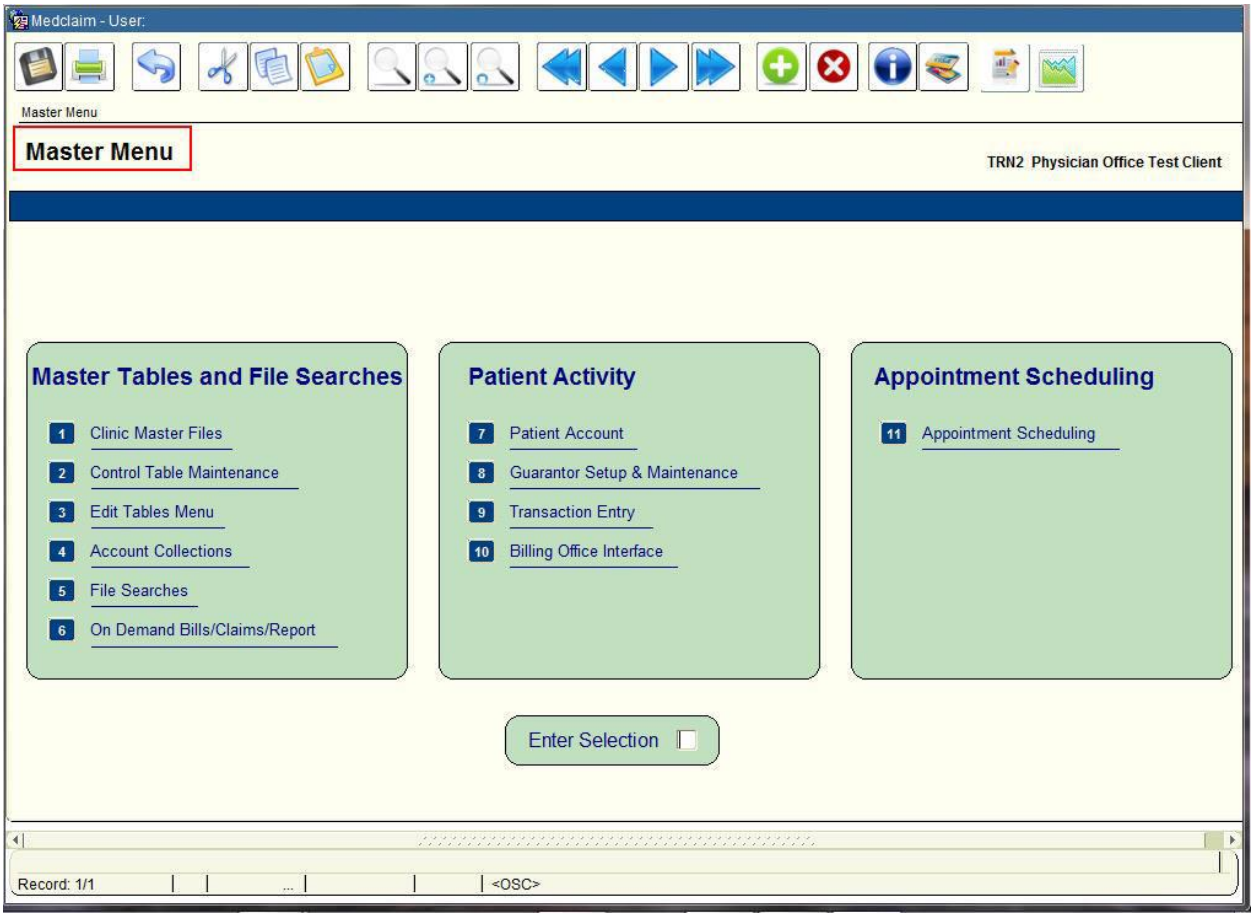
A user can use their mouse and hover over the icon until an information box appears displaying the functionality of that icon.

The following chart will explain the function of each icon on the Task Bar as well as identify the keyboard function key.

Task Bar Icon	Function	Keyboard Key
	This will save whatever data you have entered or changed. It will also act as a sticky cursor from an (LOV)	<F4>
	This will print a print screen of whatever screen you are currently on as long as the workstation is connected to a printer	<Ctrl-P>
	This icon will always return users to the previous screen. If you need to go back through two screens, you would simply click this icon twice.	<Ctrl-Q>
	Cut	<Ctrl X>
	Copy	<Ctrl C>
	Paste	<Ctrl V>
	The first icon initiates/starts a query/search	<F1>
	The second icon executes a query finding your data based on the search parameters entered when you began the query/search	<F2>
	The third icon cancels a query/search	<Ctrl-Q>
	When there are multiple blocks on one screen, this icon will move a user to the previous block	<F9>
	When there are multiple records, this icon will move a user to the previous record	<Up Arrow>
	When there are multiple records, this icon will move a user to the next record	<Down arrow>
	When there are multiple blocks on one screen, this icon will move a user to the next block	<F8>
	Insert a record	<F3>
	Delete a record	<Ctrl-E>
	ClinixPM Resource Guides and Helpful Hints web page	<Ctrl-I>
	ePayment Icon - Provides clients the ability to post patient payments	<Ctrl-N>
	The reports Icon will default the system to the Reports Menu	<Ctrl-R>
	The Portal icon will access DashboardMD	<Ctrl-L>

Master Menu:

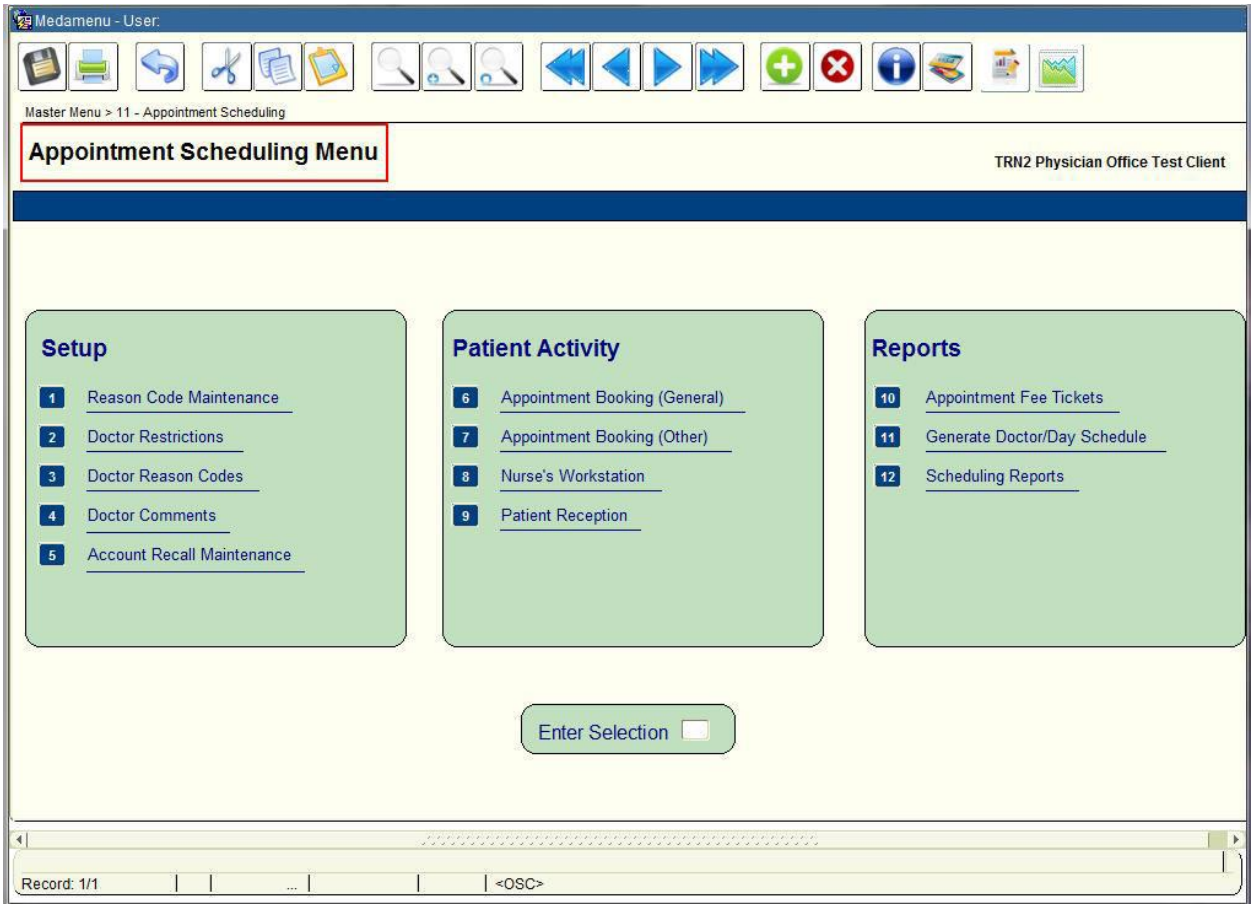
This screen will always be the starting point for anything you need to accomplish in the ClinixPM system. From here, you can navigate to other menu items called sub menus, or into specific screens.



Sub Menus:

Depending on which menu item you select from the Master Menu you might be directed to a sub-menu that would allow the ClinixPM user to make a more specific selection.

For example, item number 11 -Appointment Scheduling from the Master Menu was selected and displays for the user the 'Appointment Scheduling Menu' as shown below:



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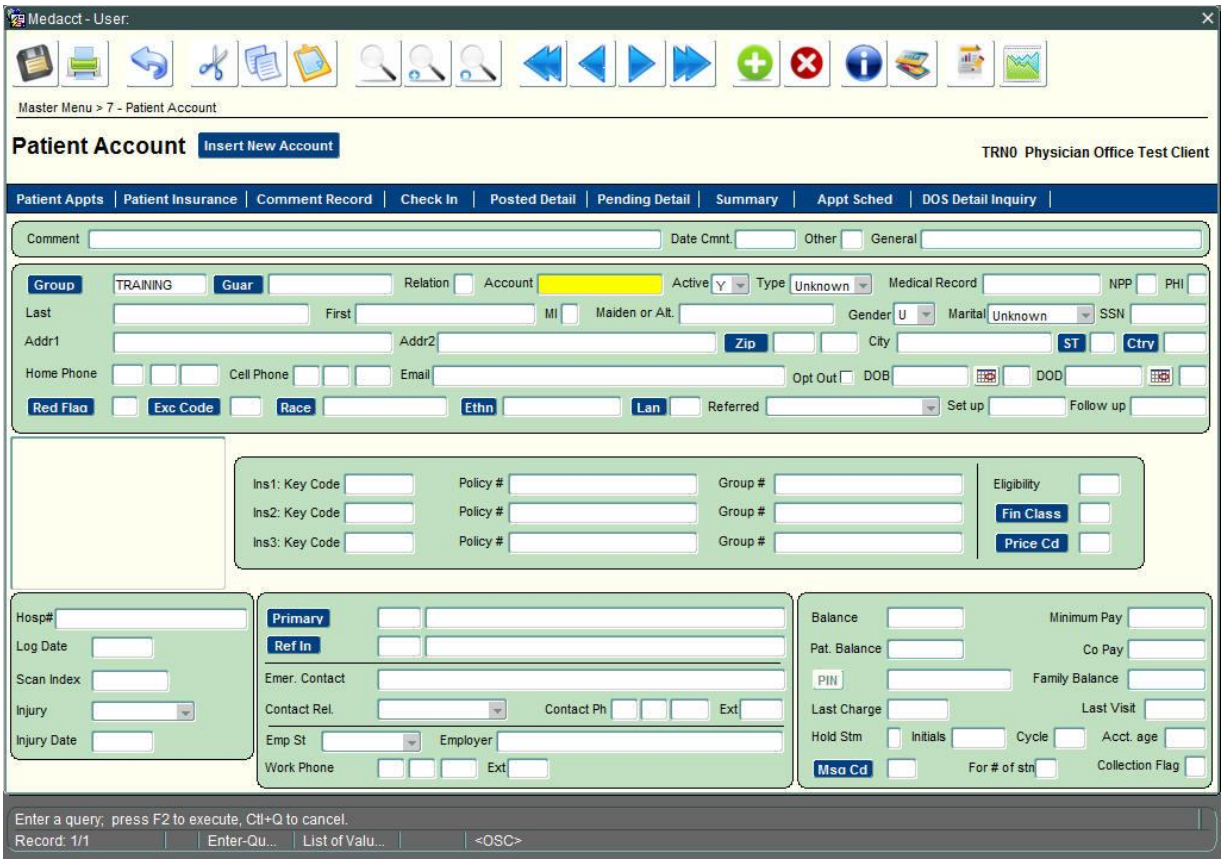
Patient Account Screen: MM7



The following is a table of Field Names and Field Descriptions for the Patient Account Screen.

Field Name	Field Description – Patient Account
Comment	Displays the last comment recorded on <F12> Comment Rec. or the 'tagged' comment if applicable.
Date Cmnt.	Displays the date of the comment showing in the comment field.
Other	One character field for custom use.
General	This field will display additional comments.
Group	This field will display the Group code as set in the master table. The group code will automatically default if set on MM1.1.
Guar	This field will display the guarantor number.
Relation	This field is referring to 'how is the patient related to the guarantor?' 1 = Self, 2 = Spouse, 3 = Child, 4 = Other, which is displayed at the **Help Message Section** help bar in the bottom left corner of the screen.
Account	This field will display the patient's account number.
Active	This field will display the status of the patient's account. Options are 'Y' for active or 'N' if the account is deactivated.
Type	This field will display the type of account. Options are Patient, Temporary, Z- Company or Unknown.

Medical Record	If the Medical Record or chart # is different from the patient account #, and it is important to the practice, it is entered in this field. For conversions, if the account number is different in the previous PM system, that account number can be entered here as a search field.
NPP	Notice of Privacy Practice – Valid entries are either 'Y' or 'N'. Use this field to show that notice has been given. If the practice has a policy of only giving a patient the Notice of Privacy Practice one time then the user that hands the notice to the patient can enter a 'Y' in this field and then the next time this patient's account is pulled up, they know that they do not have to offer it to them again.
PHI	Protected Health Information field. This reflects if patient (or the patient's parent or guarantor, if patient is a minor) forbids sharing of their info to anyone else valid entries are Y-Yes or N-No. A pop-up will display advising the user to review PHI notes on the F-12 comment screen if this field is flagged with 'Y'.
Last	Patient's last name - If the patient is the subscriber of the insurance, this name must match exactly, the name on the insurance card to prevent denial of the claim.
First	Patient's first name - If the patient is the subscriber of the insurance, this name must match exactly, the name on the insurance card to prevent denial of the claim.
MI	Patient's middle initial.
Maiden or Alt.	Maiden or Alternate Name. This is useful if patient goes by a different first name than what is on the insurance card and/or reflected in the First name field; such as 'Bill' for 'William'.
Gender	The options are M for 'Male' , F for 'Female' or U for 'Unknown' in this required field.
Marital	Valid entries for the Patient's Marital Status: 1-Single, 2-Married, 3-Unknown, 4-Divorced, 5-Widowed, 6-Legally Separated. Select the option by clicking on the down arrow to the right of the field.
SSN	Patient's Social Security Number – Management for the practice decides whether this field is required or not. If used it must be entered in a nine-digit format.
Addr1	Patient's address will auto-populate if the relationship to the guarantor is 1 = Self, 2 = Spouse, 3 = Child. Enter the correct information if patient's address is different from the guarantor's. If two lines are needed, keep in mind that the post office reads an address from the bottom up therefore try to keep all address info on this line.
Addr2	The post office reads an address from the bottom up, therefore try to keep all address info on line 1 and only use this row if absolutely necessary. This field can be used for 'In Care of', if needed.
Zip	This is for the patient's zip code. Enter the correct information if patient's address is different from the guarantor's; Note: format will adjust with Country choice.

City	Patient's city of residence (will auto-populate after zip code is entered) Enter correct information if patient's address is different from the guarantor's.
ST	Patient's state of residence (will auto-populate after zip code is entered) Enter correct information if patient's address is different from the guarantor's.
Country	USA will default. To select a foreign country, the user activates the cursor in the Country field and selects **<Ctl f>** or clicks on the Ctry LOV. The **<F2>** Function key or the **'Execute Query'** icon from the Task Bar displays the list of countries. By selecting **<F1>** Function key or the **'Enter Query'** icon from the Task Bar, the user can enter the name of the country in the Country field and select **<F2>** Function key or the '**Execute Query'** icon from the Task Bar to display the queried country.
Home Phone	This is for the patient's phone number.
Cell Phone	Patient's cell phone #, if applicable.
E-Mail	Patient's email address, if applicable. This field is informational only.
Opt Out	Check box to indicate if a patient declines providing an email address
DOB	Date of Birth requires an 8-digit format (MMDDYYYY). When entered, the system will auto-populate the Age field above the DOB field.
DOD	Date of Death requires an 8-digit format (MMDDYYYY).
Red Flag	Alerts the provider of any reported identity theft regarding the patient. Valid entries are numeric, use the LOV or List Of Values to locate appropriate value, the "sticky cursor" feature will pull code back to field.
Exc Code	Exception Codes are user defined and set up in the Master Files by the client. This field indicates an 'exception to the norm' or to note specific info regarding a patient's account. Exception Codes can be used to prevent a statement or claim from generating and can cause an appointment schedule override, indicating to that user that the patient may need to speak to someone in the office, depending upon the code. ClinixPM automatically loads the following four exception codes: BA – Bad Account; PD – Past Due CA – Collection Account; CP – Collection Pending
Race	Race of the patient. Select the LOV or List of Values button, a window populates with possible entries. Each entry with this symbol beside it can be opened by a mouse click to view additional valid entries. Locate the correct entry then use the 'Sticky Cursor' feature to pull the code back into the field. This data pushes to an interfaced EHR validating one requirement of meaningful use.
Ethn	Ethnicity of the patient. Select the LOV or List of Values button, a window populates with possible entries. Each entry with this symbol beside it can be opened by a mouse click to view additional valid entries. Locate the correct entry then use the 'Sticky Cursor' feature to pull the code back into the field. This data pushes to an interfaced EHR validating one requirement of meaningful use.
Lan	Language of the patient. Select the LOV or List of Values, a window opens, locate the correct entry, use the 'Sticky Cursor' feature to pull the code back

	into the field. This data pushes to an interfaced EHR validating one requirement of meaningful use.
Referred	This field will display the Referred options that are entered in MM2.20 as to how the patient was informed about a practice.
Set up	This is the date the account was established. ClinixPM will auto-populate the date when the record is saved.
Follow up	Used to create a tickler for follow up on this patient's account requires 8-digit date format (MMDDYYYY).
Ins1: Key Code	Displays the primary insurance key code.
Ins2: Key Code	Displays the secondary insurance key code.
Ins3: Key Code	Displays the tertiary insurance key code.
Group #	These fields will display the insurance group number for any primary, secondary, and tertiary insurance a patient might have.
Policy #	These fields will display the insurance policy number for any primary, secondary and tertiary insurance a patient might have.
Eligibility	Reflects last date the eligibility was checked.
Fin Class	This reflects the Financial Class of the primary insurance on the account.
Price Cd	This two character code reflects the Price Code for the fee schedule to be used.
Hosp#	This field will display a hospital identification number when an interface is active.
Log Date	The log date pulls from the activity log record. The activity log record is accessed through a batch in MM13.8 and selecting **<F12>** or the **F12 Demo/Charge Entry Tab** from the saved batch.
Scan Index	This field identifies the number associated with document imaging of patient demographic and/or insurance information.
Injury	If the visit is due to an injury, select from the drop down box. Selections are: Emp Related, Automobile, Other. If utilized, this information will print on the claim.
Injury Date	Date the patient was injured, if applicable. If utilized, this information will print on the claim.
Primary	This is the attending physician or the doctor who is seeing the patient; when entered here, it will default during charge entry.
Ref In	This is the patient's referring doctor; when entered here, it will default during charge entry.
Emer. Contact	Enter the patient emergency contact person's name in this field.
Contact Rel.	From the drop down box, select the patient's emergency contact relation. 1 = Spouse, 2 =Child, 3 = Parent, 4 = Sibling, 5 = Other
Contact Ph	Enter the patient's emergency contact person's phone number.
Ext	Extension number, if applicable
Emp St	Patient's employment status: 1-Employed, 2-Part Time, 3-Full-Time student.

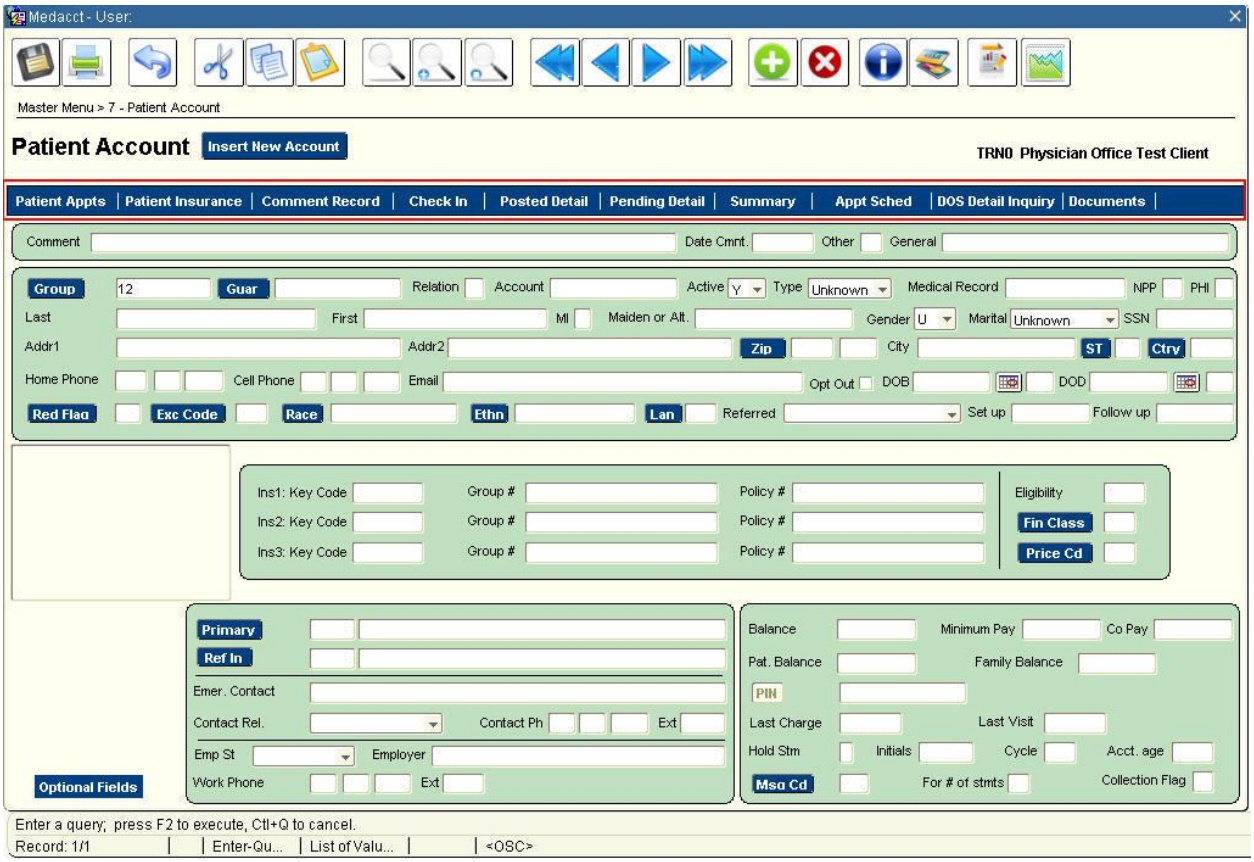
Employer	Patient's place of employment (Free text format).
Work Phone	Patient's work phone #, if applicable.
Ext	Extension number, if applicable.
Balance	Account Balance not including pending transactions.
Pat. Balance	Patient responsibility balance not including pending transactions.
PIN	This field is associated with the Patient Portal feature.
Last Charge	Date of the last processed charge, not including pending transactions.
Hold Stm	'N' defaults. If 'Y' is entered the patient balance ages and must be **manually** removed. Use a Numeric value, the system will count down the number of statement cycles to hold this also prevents the account from aging.
Initials	Enter user initial's to create a tickler for follow up on this patient's account.
Cycle	This is the statement cycle count.
Msg Cd	Enter a Statement Message Code for a *specific* message to appear on the patient's statement.
For # of stmts	Enter the number of statement cycles a statement message needs to print on a specific patient's account.
Minimum Pay	Enter a minimum payment amount when the patient is on a payment plan.
Co Pay	Populated from the Pt Insurance record, the patient's copay amount
Family Balance	Family Balance, balance of all linked accounts not including pending transactions.
Last Visit	Often inserted during a conversion, this optional field requires an 8-digit date format (MMDDYYYY).
Acct. Age	This is the age of the account.
Collection Flag	After charges are posted enter 'F' for 'Force' or 'S' to 'Suspend'. • For accounts with 'F', the application will force an account to be written off and turned over to the collections agency regardless of what criteria is set on MM1.22. Once the collection edit process is completed, the 'Exception Code' will automatically update to a 'CP' to indicate that the account will be with a collection agency, and the 'Collection Flag' field will be reset to null. • For accounts with 'S', the application will suspend an account from being written off and turned over to the collection agency. When the collections edit runs, the application will bypass accounts that have the 'Collection Flag' set to 'S' regardless of the balance or the collection parameters. The program will leave the 'Collection Flag' set to 'S', which will keep the account from being sent to collections, until the 'S' is manually removed.

Tabs:

Every screen beyond the ClinixPM Master Menu and Sub Menus will have 'Tabs' at the top of the screen. The 'Tabs' will vary depending on what type of screen is displayed.

The 'Tabs' allow the ClinixPM user to drill further into the system based on specific functions.

For example, while on the 'Patient Account' screen, as shown below, you will be able to access the patient comment records, the patient's insurance records, their pending and posted transactions, etc.



Moving field to field:

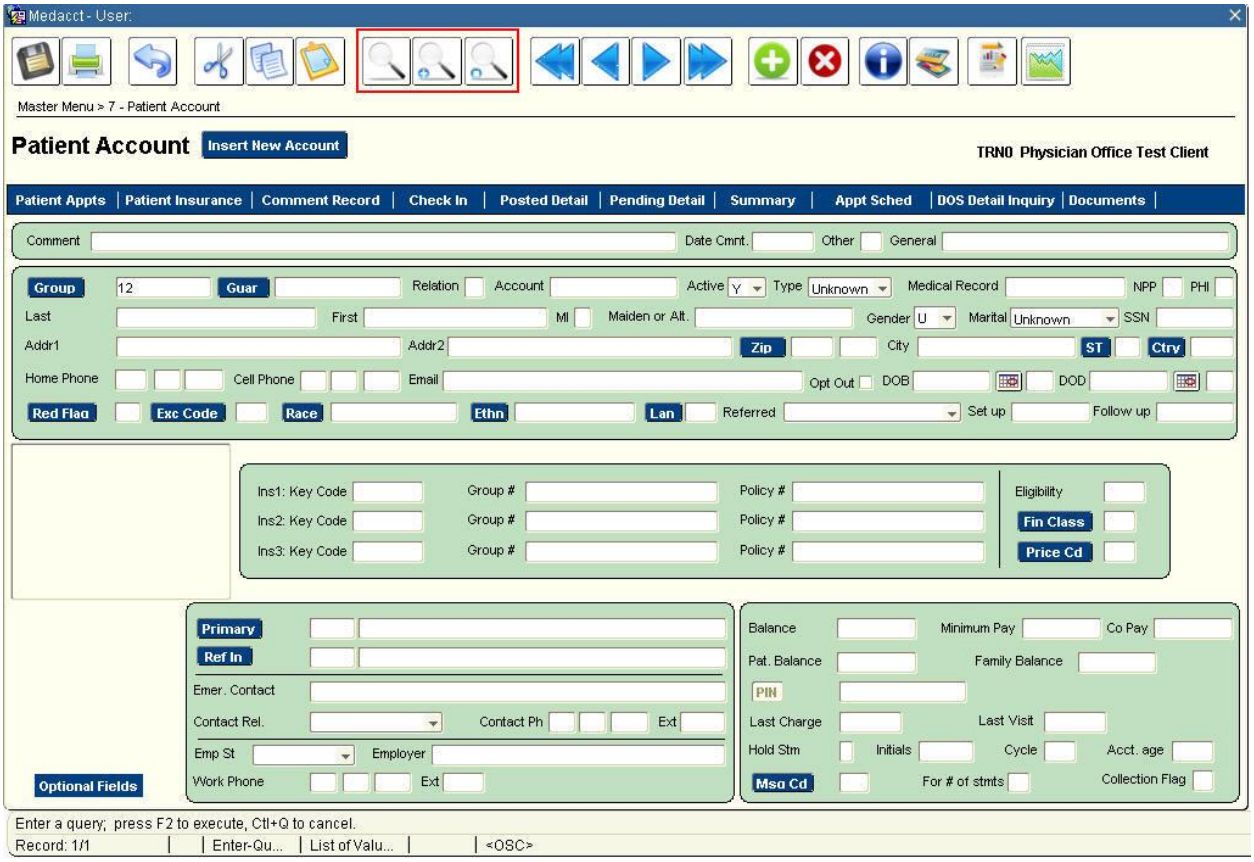
There are three (3) methods to move forward, field to field, in ClinixPM:

- Using the <Enter> Key
- Using the <Tab> Key
- Using the mouse

There are two (2) methods to move backward, field to field, in ClinixPM:

- Selecting <Shift Tab>
- Using the mouse

Searching for data using the Query feature



Users are able to search or ‘Query', which is a term that is used in ClinixPM, for specific data related to the user's active screen.

ClinixPM has three (3) types of ‘Query’ icons on the Task Bar that also have correlating keyboard function keys as stated below:

- The first is called the ‘Enter Query’ icon that enables a user to begin searching for data. The below icon can be selected or <F1> on the keyboard.

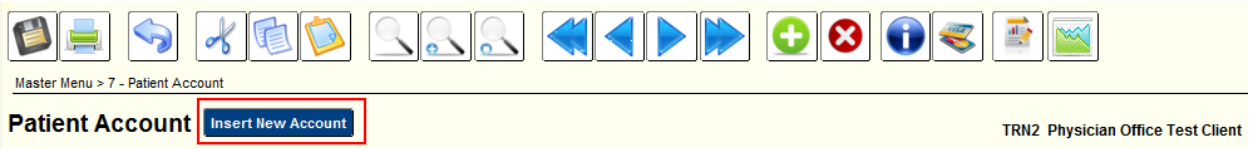
- The second is called the ‘Execute Query’ icon that enables a user to receive the data they were searching for. The below icon can be selected or <F2> on the keyboard.

- The third is called the ‘Cancel Query’ icon that allows a user to get out of the query mode. The below icon can be selected or <Ctrl Q> on the keyboard.

- While on the Patient Account screen, MM7, to search for another patient, there are 2 choices to clear the active patient record:
    - 
    - F1 on the keyboard

- The Patient Account screen, MM7, is already in a query mode when displayed. A user will only need to enter the specific criteria he/she is looking for and 'Execute Query' by selecting the Task Bar icon in the red box below or <F2> on the keyboard.

- If the user does not want to query/search for a patient they can select the 'Insert New Account' button. This will change the screen from a 'Query' mode to an 'Insert' mode.

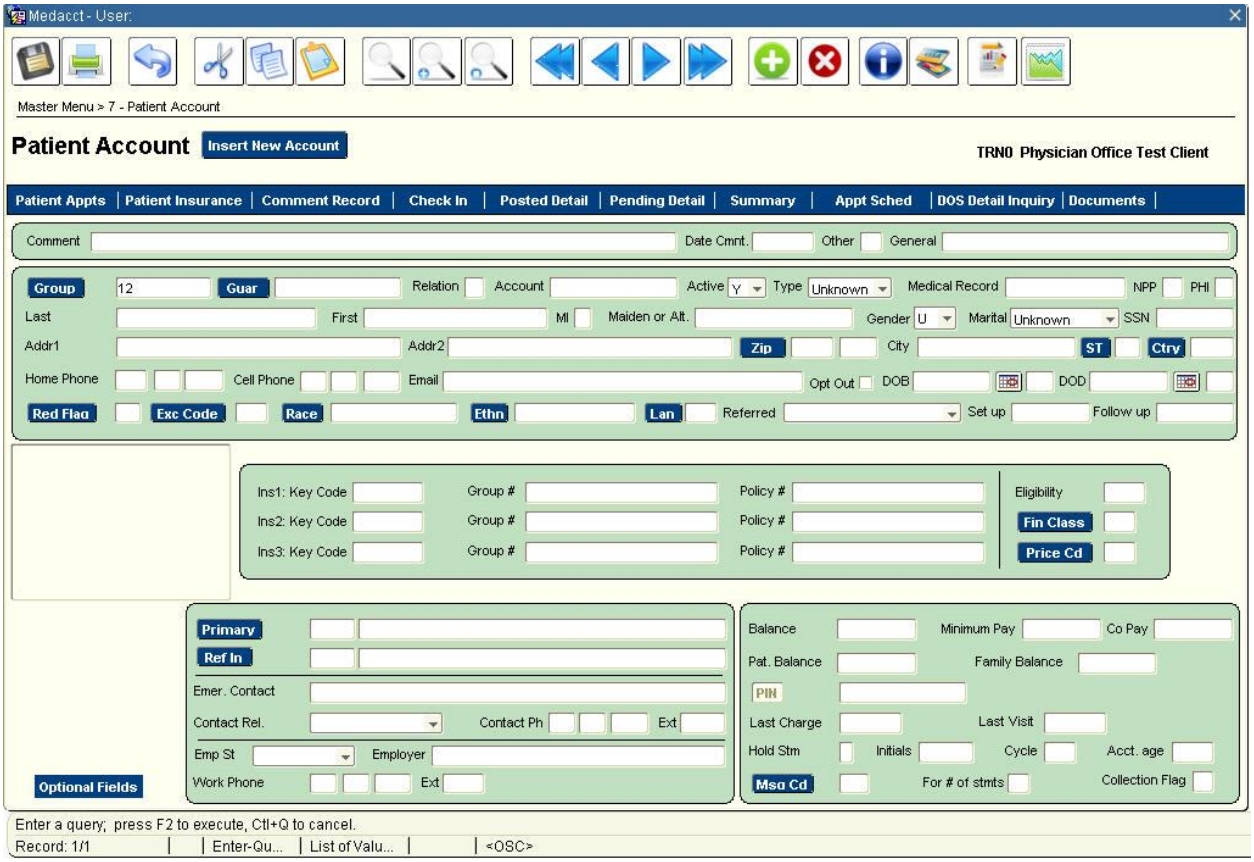


Query within a Query

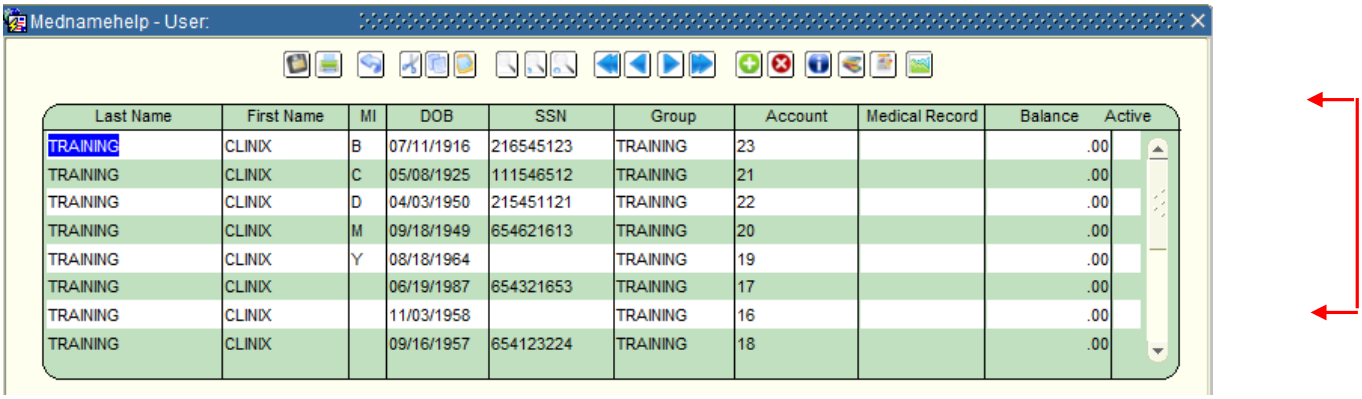
In many of the screens, the user can conduct a Query within a Query.

ClinixPM 'Query within a Query' Example 1:

In our example below the user is in the Patient Account screen, MM7. To begin a regular Query the patient, Clinix Training, is entered into the name fields.



When the 'Execute Query' icon  from the Task Bar is selected or <F2> from the keyboard, the results are shown in the example below.

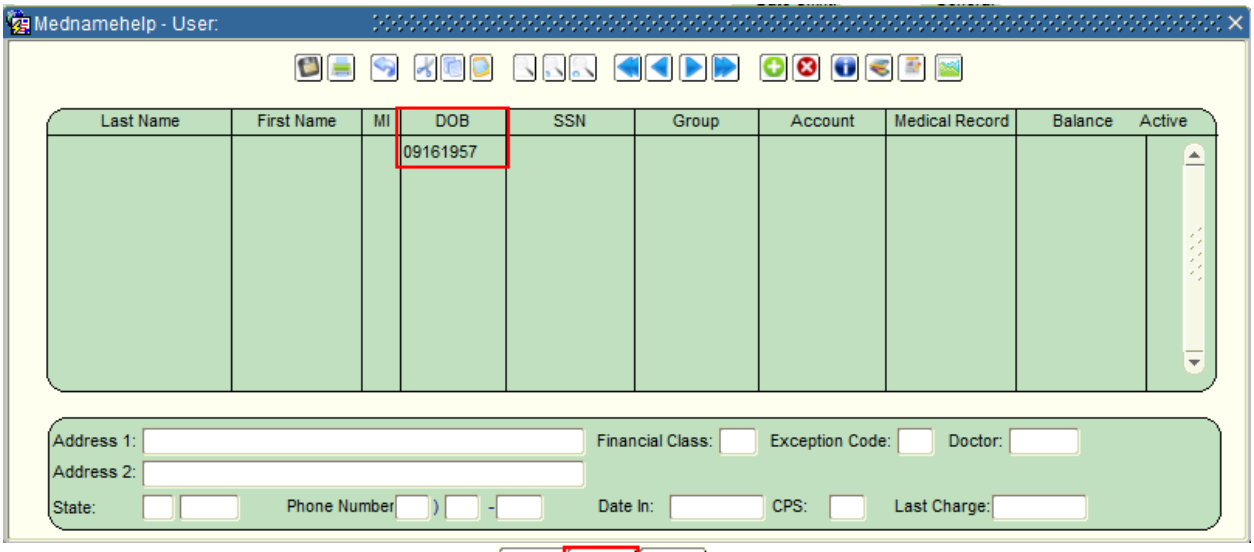


Last Name	First Name	MI	DOB	SSN	Group	Account	Medical Record	Balance	Active
TRAINING	CLINIX	B	07/11/1916	216545123	TRAINING	23		.00	
TRAINING	CLINIX	C	05/08/1925	111546512	TRAINING	21		.00	
TRAINING	CLINIX	D	04/03/1950	215451121	TRAINING	22		.00	
TRAINING	CLINIX	M	09/18/1949	654621613	TRAINING	20		.00	
TRAINING	CLINIX	Y	08/18/1964		TRAINING	19		.00	
TRAINING	CLINIX		06/19/1987	654321653	TRAINING	17		.00	
TRAINING	CLINIX		11/03/1958		TRAINING	16		.00	
TRAINING	CLINIX		09/16/1957	654123224	TRAINING	18		.00	

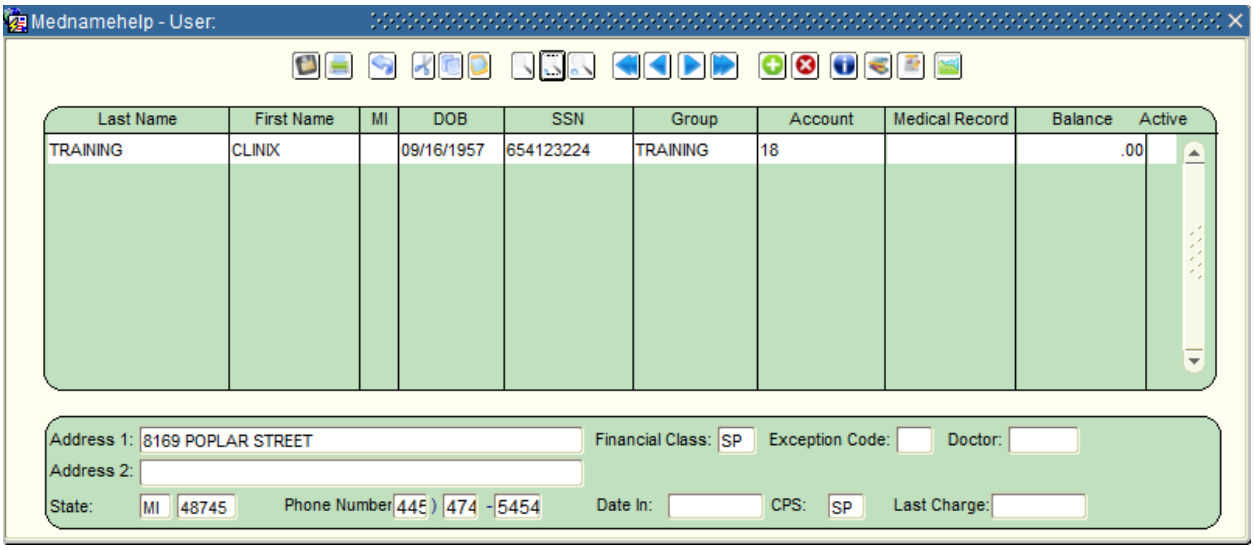
There are several patients with the name 'Clinix Training' in the database; the user needs to select the correct patient with the name Clinix Training without having to scroll down.

To conduct a 'Query within a Query', the user will select the 'Enter Query' icon  from the Task Bar or <F1> from the keyboard. Although this action clears the window of the previous data, it is retained behind the scenes. The user can enter any precise search parameters for locating the correct patient within the window that previously displayed patients with the name 'Clinix Training'

In the screen shot below, the user enters the patient's date of birth, 09/16/1957 as shown:

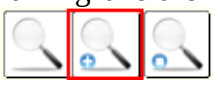


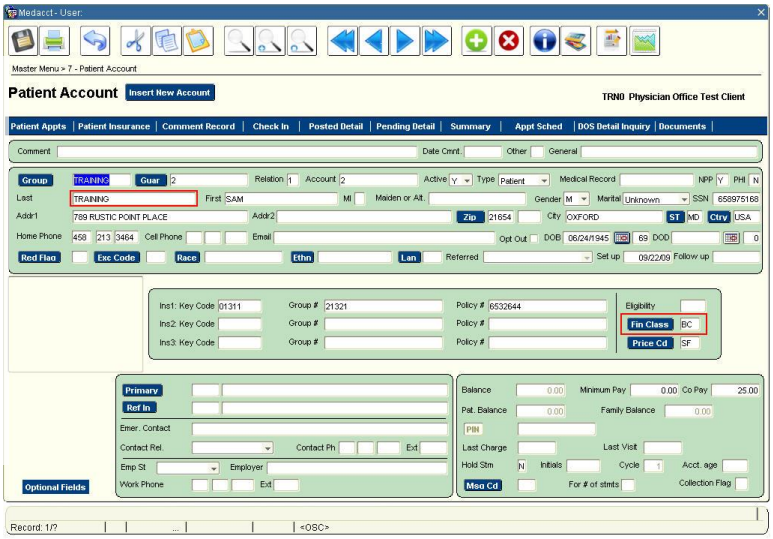
When the 'Execute Query' icon  from the Task Bar is selected or <F2> from the keyboard, the result is shown in the example below.



The user can verify additional information that is displayed at the bottom of the window such as street address, state, Zip code, and phone number. To pull the data back to the previous screen, the user can (1) double click on the highlighted data, (2) select <F4> from the keyboard or, (3) select the 'Save' icon  from the Task Bar.

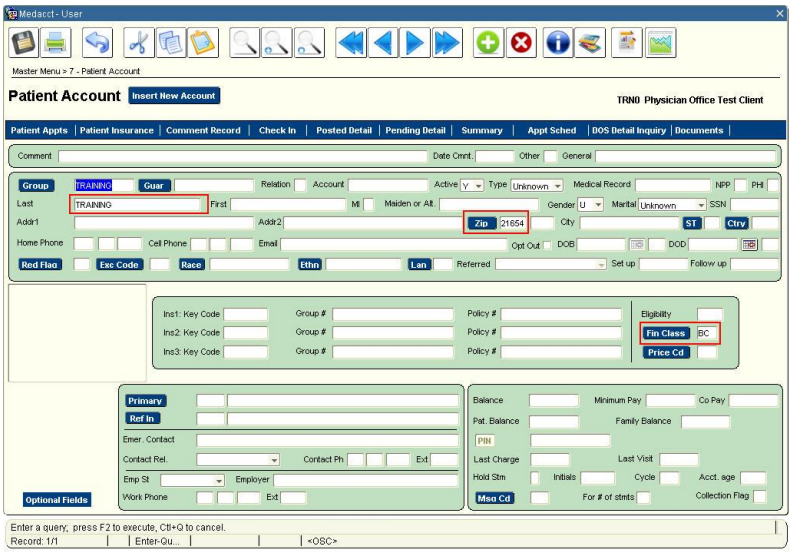
ClinixPM 'Query within a Query' Example 2:

The user entered the last name 'Training' and the Fin Class of 'BC'. When the user selected the 'Execute Query' icon  from the Task Bar or <F2> from the keyboard, the window displays the first patient with the last name 'Training' and the Fin Class of 'BC'.



Rather than scroll through all the records retrieved, the user can select the 'Enter Query' icon  from the Task Bar or <F1> from the keyboard two (2) times:

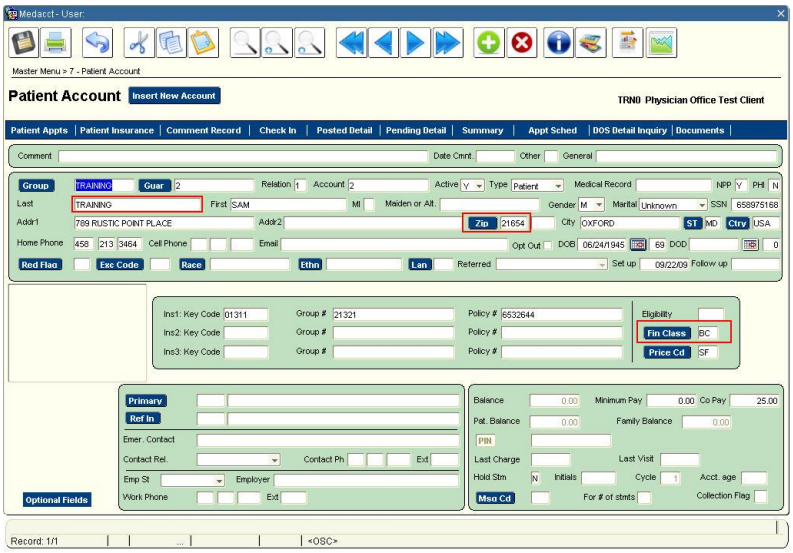
- The first selection clears the window of data.
- The second selection refreshes the original query data of the last name 'Training' and the Fin Class of 'BC'.



With the original query data displayed, the user adds the Zip code to locate all patients with the last name of 'Training' with the Fin Class of 'BC' with the Zip code '21654' as shown.

When the user selects the 'Execute Query' icon  from the Task Bar or <F2> from the keyboard, the Patient Account screen displays.

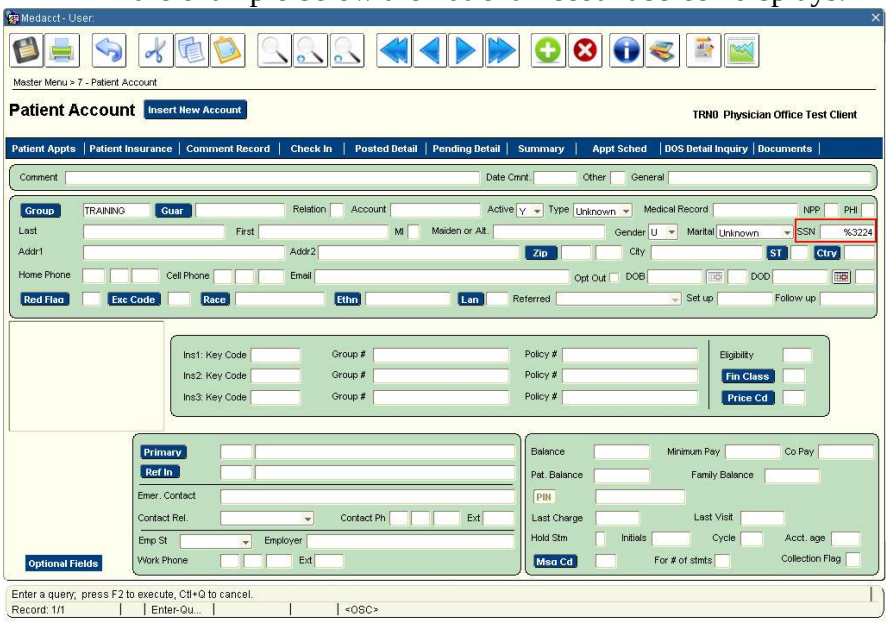
The 'Query within a Query' has located the patient with the last name 'Training' with the Fin Class of 'BC' in Zip code 21654.



ClinixPM Wildcard

ClinixPM application offers the user a Wildcard feature. The ClinixPM Wildcard is the percent symbol (%) and is entered by selecting <Shift 5> from the user's keyboard.

In the example below the Patient Account screen displays.

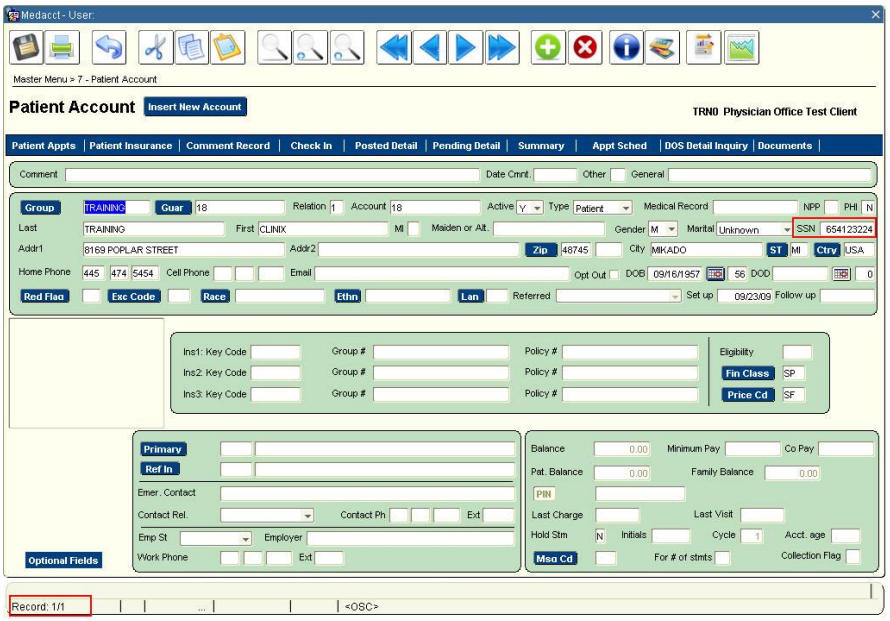


ClinixPM Wildcard Example 1:

Since this screen, first displays in query mode a user can search for a patient's record by the last four digits of the social security number. Using the ClinixPM Wildcard, the user enters the Wildcard (%) first and then the last four digits of the social security number as shown here:

The result of the Wildcard (%) search displays in the screen shot to the right.

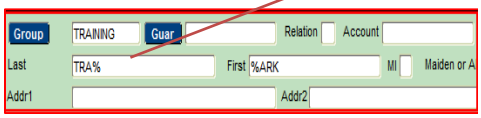
The search for the last four digits resulted in one (1) record retrieved as noted by the red in the message bar. No additional query is required for this user as this is the only patient with **'3224'** as the last four digits of the Social Security number.

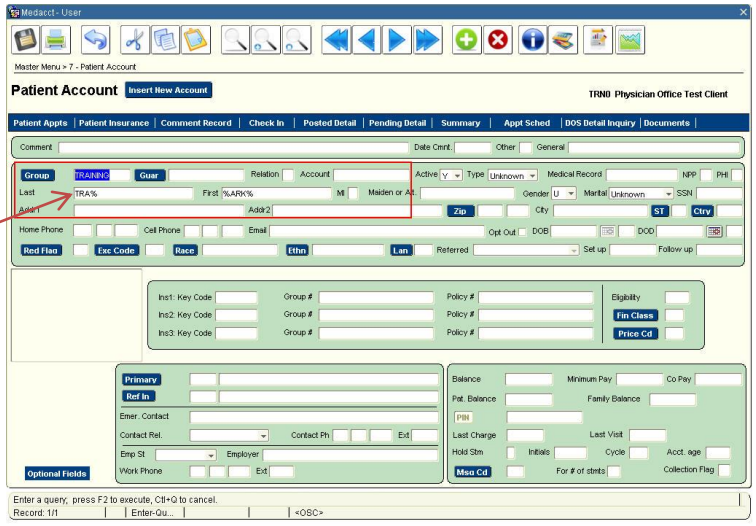


ClinixPM Wildcard (%) queries can include searching for missing pieces of information as shown in Example 2 below.

To locate a patient whose first name is handwritten and the writing is not legible, the user can use the ClinixPM Wildcard (%). The first name appears to be either Mark or Park while the last name begins with Tra with missing letters. From the Patient Account screen, the search parameters are entered as shown below:

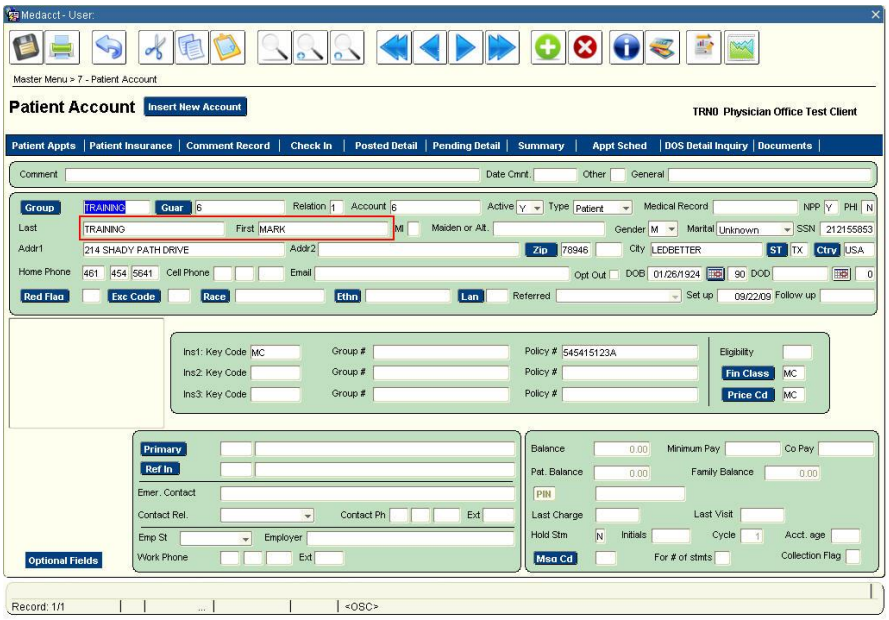
ClinixPM Wildcard Example 2:





To obtain the information needed, the user selects the 'Execute Query' icon  from the Task Bar or <F2> from the keyboard. The following screen shot displays the results of the ClinixPM Wildcard (%) search.

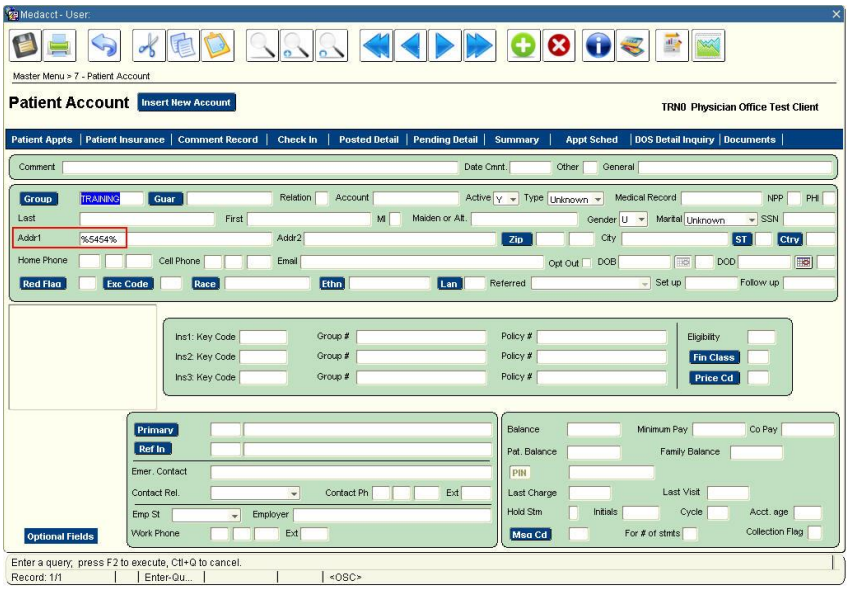
The Patient Account screen displays the Wildcard results to be the patient Mark Training.



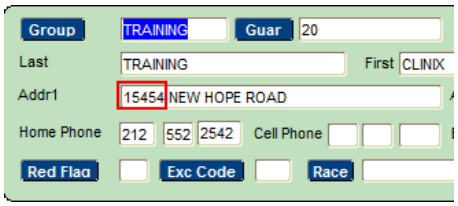
The ClinixPM Wildcard (%) search can be used in a field for specific data such as a post office box or street number as in this example below.

ClinixPM Wildcard Example 3:

The user has entered the ClinixPM Wildcard (%) before and after the numbers like this: **%5454%** as shown in the red box to the right. To obtain the information needed the user selects the 'Execute Query' icon  from the Task Bar or <F2> from the keyboard. The next screen shot displays the results of the ClinixPM Wildcard (%) search.



As shown in the screen shot to the right, the ClinixPM Wildcard (%) has located the patient account with the street address number 15454.



ClinixPM Wildcard Summary:

Although the examples have used the Patient Account screens, the ClinixPM Wildcard (%) can be used in many different screens and fields when specific information is required.

ClinixPM Wildcard % is a great tool to retrieve precise information within the ClinixPM application!

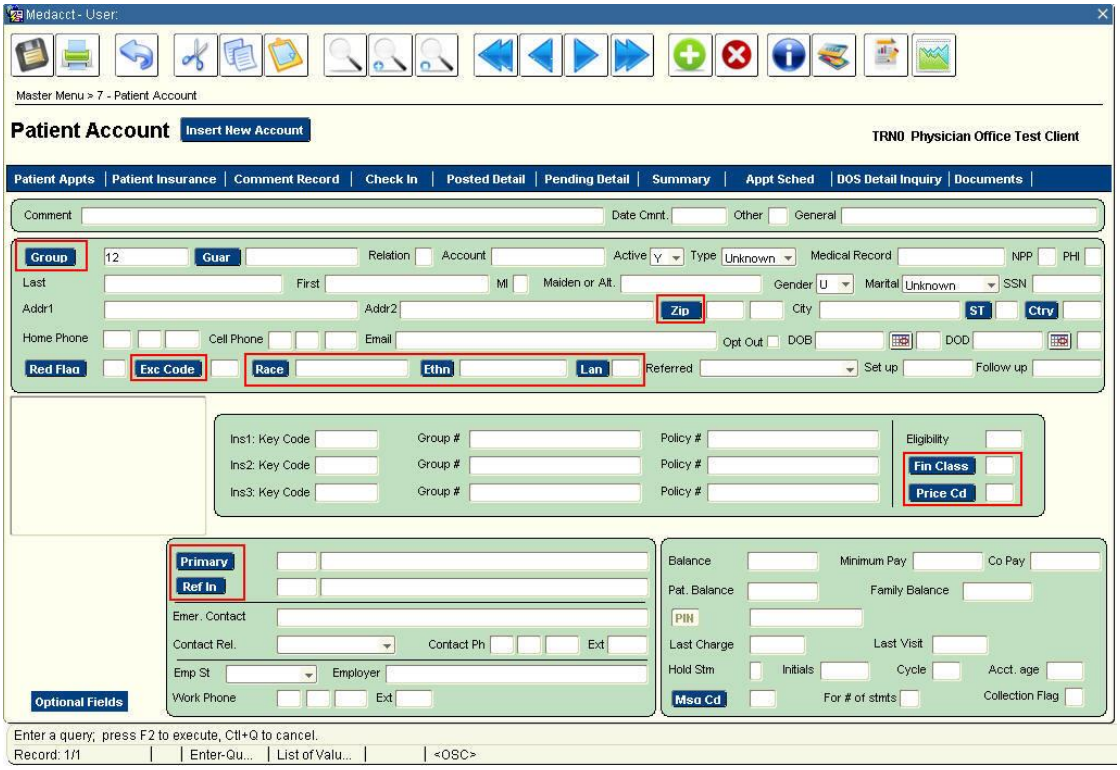
The Different Types of Lookups

Any field name that appears raised and highlighted in Blue, Primary means that particular field has a list of values associated with it. The List of Values (LOV) can aid a user in determining what appropriate data is needed for a specific field.

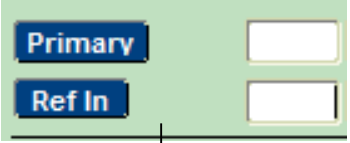
ClinixPM has two (2) types of lookups: 1. List of Values (LOV) and 2. Master Table lookup

The first type of ClinixPM lookup: 1. List of Values (LOV)

Shown below is the Patient Account Screen with several of the List of Values (LOV) fields within the red box**.**



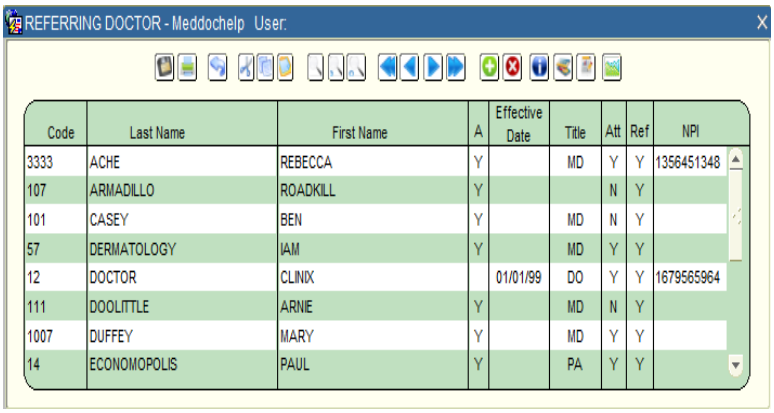
- To activate the List of Values (LOV) function, the cursor must be active in the field you want to query.



The cursor is active in the Ref In field. The user can then select <Ctrl F> on their keyboard to 'activate' the field look up or use the mouse to click on the field name List of Values (LOV).

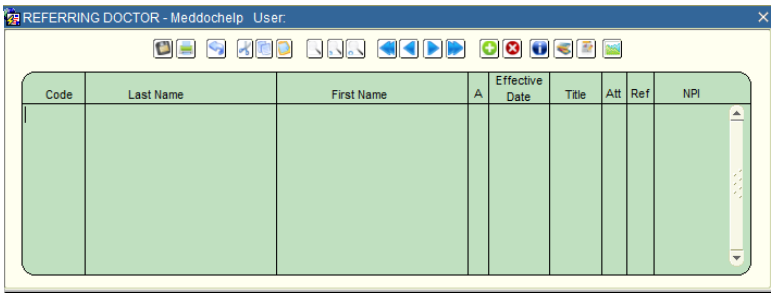
- Most field lookups will display a List of Values. The List of Values will show users the data options they have for a particular field. The next page displays the data options for the selected field.

The window to the right displays when selecting the 'Ref In' List of Values (LOV) in an active patient account.



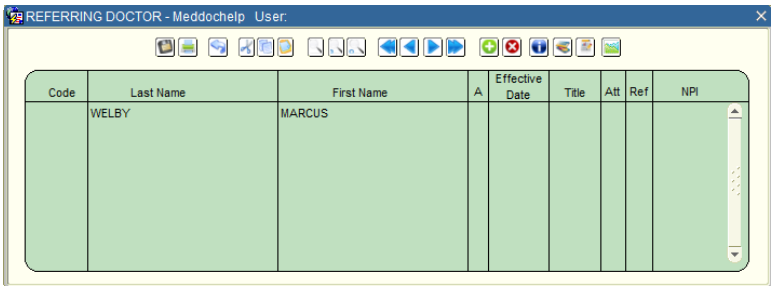
Code	Last Name	First Name	A	Effective Date	Title	Att	Ref	NPI
3333	ACHE	REBECCA	Y		MD	Y	Y	1356451348
107	ARMADILLO	ROADKILL	Y			N	Y	
101	CASEY	BEN	Y		MD	N	Y	
57	DERMATOLOGY	IAM	Y		MD	Y	Y	
12	DOCTOR	CLINIX		01/01/99	DO	Y	Y	1679565964
111	DOOLITTLE	ARNIE	Y		MD	N	Y	
1007	DUFFEY	MARY	Y		MD	Y	Y	
14	ECONOMOPOLIS	PAUL	Y		PA	Y	Y	

If more precise information is required, the user can select the 'Enter Query' icon  from the Task Bar or <F1> from the keyboard to clear the window as shown in this example.



Code	Last Name	First Name	A	Effective Date	Title	Att	Ref	NPI

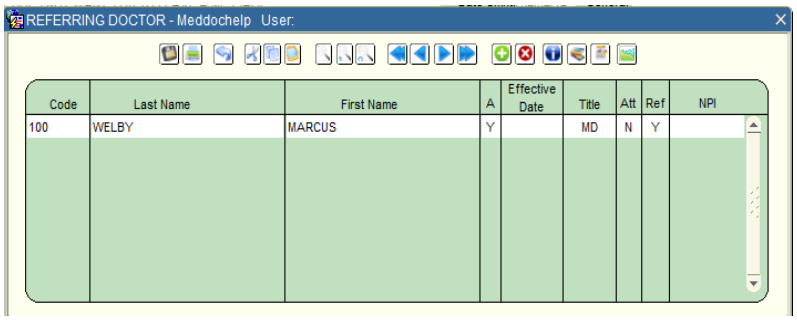
The user has tabbed to the Last Name Field, entered 'WELBY', tabbed to the First Name field, and entered 'MARCUS' to locate the correct physician. The user then selects the 'Execute Query' icon  from the Task Bar or <F2> from the keyboard.



Code	Last Name	First Name	A	Effective Date	Title	Att	Ref	NPI
	WELBY	MARCUS						

To pull the data back to the previous screen thser can (1) double click on the highlighted data, (2) select <F4> from the keyboard or,

(3) select the 'Save' icon from the Task Bar.

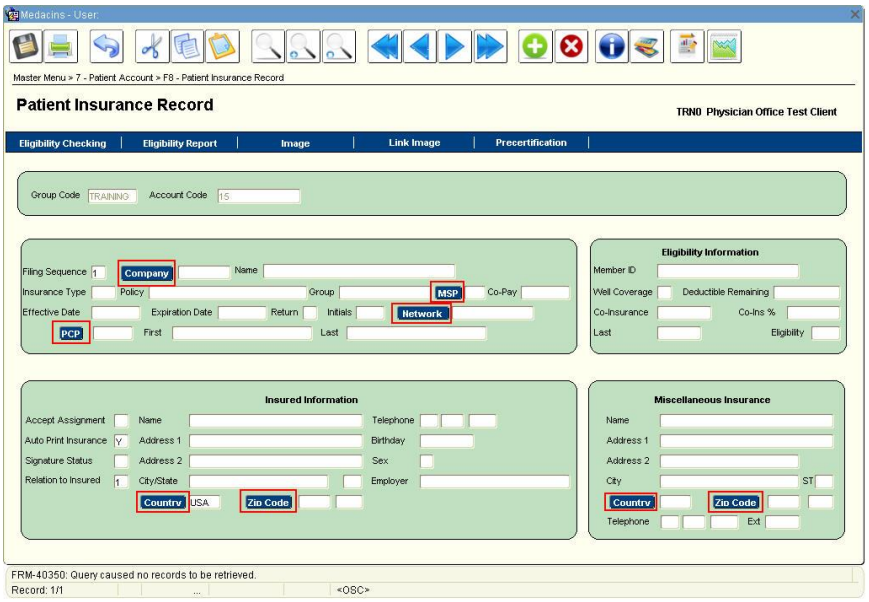


The second type of ClinixPM lookup: 2. Master Table Lookup

- Sometimes when you select a field name it will take you to the actual Master Table rather than providing only a List of Values (LOV). From the Master Table you can query/search on additional information to locate precise records.

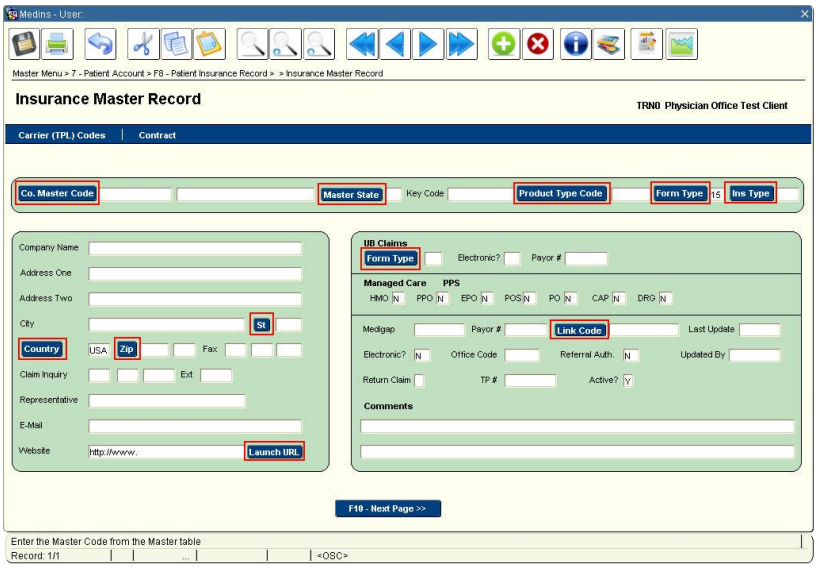
- From the Patient Account screen, the user must select the tab marked Patient Insurance or <F8> from the keyboard. When this tab is selected the screen below is displayed.

- While in the Patient Insurance Record screen, there are several Lookups on this screen that are boxed in red.



The fields to the left links the user to information about the insurance codes and companies and additional important information. When the Company LOV is selected the user is linked to part of the ClinixPM 'engine' - the Master Tables. This function allows the user the opportunity to locate the correct insurance company for the patient's account.

The screen to the right displays after the Company List of Values (LOV) is selected from the Patient Insurance Record. There are several Lookups on this screen.



Sticky Cursors

Users can apply the 'sticky cursor' to bring back data from a List of Values (LOV). Once you find the information you want to bring back to the active screen you are on the user can:

1. Double Click on the highlighted data
2. Select the <F4> function key on your keyboard
3. Select the save icon on the Task Bar, 

Although not every screen allows the use of the Sticky Cursor, it is certainly beneficial to the user where it does have functionality.

Practice

Use what you have learned to Query the following information.

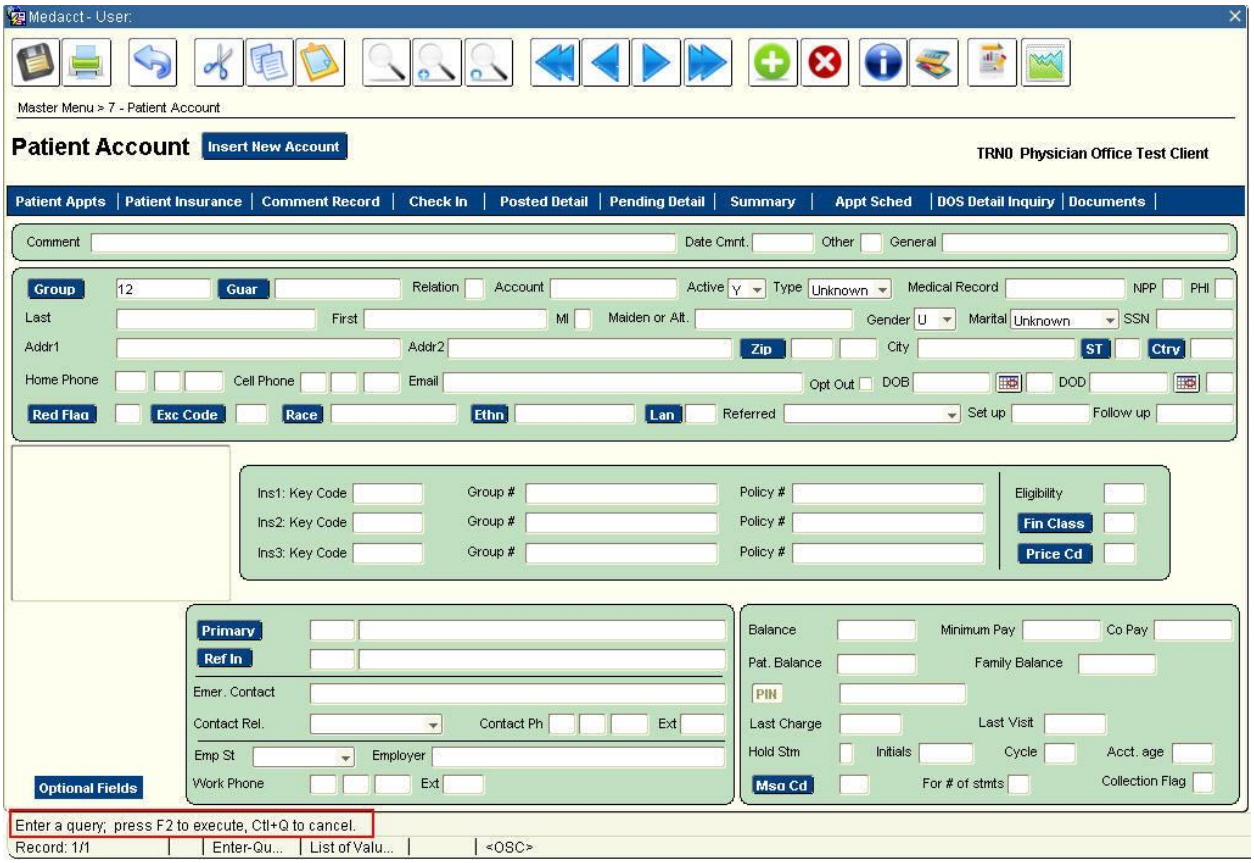
- Account number
  - 4
- SSN
  - 542122341
- Date of Birth
  - 09/30/1978
- Name
  - Sam Training
  - Mark Training
  - Debbie Tra%
  - Clinix Training
    a. Query within a Query by searching for the Clinix Training patient with a DOB of 09/16/1957
- Phone
  - 854-921-5861
  - 845-895-1653

Example of using the (LOV) function

- Sticky Cursors
  - Debbie Training
    a. Click on the Zip (LOV)
    b. When the (LOV) window displays an empty field, put the cursor in the City field and type in the name of Brent%. Click into the State field and type in TN
    c. Select the Execute Query icon from the Task Bar or the <F2> function key from the keyboard.
    d. Double click on the Zip Code desired and the Sticky Cursor feature will move the information to the Zip Code field and populate the city and state.
  - Jessica Training
    a. Click the Primary (LOV) to display the list of primary doctors.
    b. Select the Enter Query icon from the Task Bar or the <F1> function key from the keyboard.
    c. When the (LOV) window displays an empty field, tab to the Last Name field and enter Spock.
    d. Select the Execute Query icon from the Task Bar or the <F2> function key from the keyboard.
    e. Double click on the highlighted doctor code number and the Sticky Cursor feature will move the information to the Primary field.

Help Messages

ClinixPM has Help Message that will display in the bottom left corner of the screen. There are different types of Help Messages that display to aid the user in determining what steps need to be taken.



Below are some examples of the different Help Messages and their meaning:

- **Enter a query, press F2 to execute, Ctrl-Q to cancel:**

Enter a query; press F2 to execute, Ctl+Q to cancel.

  - The above message tells the user they are in a query/search mode. Being in a query mode only allows the user to search for information. Users will not be able to insert new data in a query mode.
  - This message also reminds the ClinixPM user what function key to use once they have entered all of their search parameters. They can select <F2> on the keyboard or select the 'Execute Query' icon in the Task Bar,

- **Transaction Complete: 1 record applied and saved:**

FRM-40400: Transaction complete: 1 records applied and saved.

  - The above message informs the user that the changes and/or new information that has been entered has been saved. This is a very important Help Message and all users should watch for this message after saving data.

- **Field is required:**

FRM-40202: Field must be entered.

  - The above message will only display if the user tries to skip a field that is required.

- **Field must be form 999:**

FRM-40209: Field must be of form 999.

  - This field will display when the user is NOT entering the correct data in a field that requires numeric values-phone number, for example. Typically, the user has accidently entered a symbol or an alpha character.

- **Field must be of form 999999999:**

FRM-40209: Field must be of form 999999999.

  - The above message informs the user they have NOT entered enough characters in the active field. For example, this screen shot was derived from a user not entering enough numeric values in the Social Security field.

- **Record: x/x**

  Record: 1/? This Help Message indicates there is more than one record that matches the criteria a user has entered. The Down Arrow key on the keyboard will display additional records.

  Record: 1/1

  Note: the particular screen shot is just an example.
  Not all messages display 'Record:1/1'

  - This Help Message indicates there is only one record that matches the criteria a user has entered.

  Record: 2/2

  Note: the particular screen shot is just an example.
  Not all messages display 'Record:2/2'

  - This Help Message indicates you are currently viewing the last record**.**

- **Valid Entries:**

  VALID ENTRIES: '1'-SAME,'2'-SPOUSE','3'-CHILD,'4'-OTHER

  NOTE the particular screen shot is just an example. Not all 'valid entries' Help Messages display the same options but are specific to the active field.

  - This Help Message provides the valid entries for the specific field the cursor is in. This Help Message does not appear for every field.

- **Query will retrieve xx records**

  FRM-40355: Query will retrieve 8 records.

  - This Help Message displays when a user requests a count of patient accounts that match the specific search criteria entered when querying/searching for information. To get a count a user will need to be in the query/search mode, enter their parameters, and select <Shift F12>.

Logging Out of ClinixPM

Users should always use the 'Back' icon from the Task Bar or <**Crtl Q**> to exit out of the ClinixPM screens.

If more than one user shares a computer, the user that is logging out of the system should also select 'Logout' on the ClinixPM Home Page.

The screen shot below is the last screen you will see to exit out of before the session will close. To close the screen, the user will select the circled icon.


http://cas9.clinixmis.net:7778/j2ee/clinix/jsp/clinixindex.jsp?pass=3
ClinixMIS Login Page
File Edit View Favorites Tools Help
Clinix
An ECI Healthcare Partner
Clinix Medical Information Services
www.ClinixMIS.com
Copyright © 1995-2013 Clinix Medical Information Services, All Rights Reserved
User ID:
Password:
Login
Welcome to the ClinixMIS System
Please enter your User ID and Password
in the space provided above
Clinix Medical Information Services, 278 Franklin Rd., Suite 300, Brentwood, TN 37027
www.ClinixMIS.com
100%

Your Training Database

Each user will be assigned a user name, password, Account Last Name and Doctor to use in **all of the exercises** throughout the Training Modules.

User Name: _____TRN_____

Password: _____TRN_____

Accounts' Last Name: _____

Doctor: _____

Printer Device: ____VIEW_____

Group: _____Training_____

Clinix
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EXERCISES

1. Log into ClinixPM. What's the name of the first menu? _____

2. Query patient Debbie Training, account # 10. Her SSN is _____

3. Query patient Jessica Training; her primary insurance policy number is _____

4. Query patient Lucas Training. What date was the comment entered? _____

5. Query patient Sam Training. What is his insurance group number? _____

6. Query patient Mark Training, account #6. His Financial Class is _____.

7. Locate the patient whose full first name you cannot read-last name is Training, first name starts with a Mo. _____

QUESTIONS

Answers ***Match the letters to the numbers***

1.		How do you move from screen to screen?
2.		How do you move to the previous screen?
3.		How do you delete a field?
4.		How do you get a count before you execute a query?
5.		How do you access a Lookup Table (LOV)?
6.		How do you delete a record?
7.		How do you insert a record?
8.		How do you find a patient that has been previously registered?
9.		Where do you find Help Messages?
10.		How do you select from a field lookup (LOV)

ANSWERS

A.	Insert a Record Icon-keyboard function key <F3>
B.	Back Icon-keyboard function key <Ctrl Q>
C.	Click on Field Name- keyboard function key <Ctrl F>
D.	Keyboard <Delete> key or backspace key
E.	<Shift F12>
F.	Function Buttons – Tabs
G.	Delete a Record Icon-keyboard function key <Ctrl E>
H.	Enter/Execute Query Icons- keyboard function keys <F1>and <F2>
I.	Bottom of left corner of the screen
J.	Double click on the selection- keyboard function key <F4> or 'Save' icon

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ClinixPM Training Signoff

NAME_____

DATE TRAINING COMPLETED _____

Navigating through ClinixPM - Module 1

Review the Module 1 Signoff topics and tell me if we need to go over something again.

Check mark	Subject	User's Initials
	Logging into ClinixPM	
	ClinixPM Home Page Overview	
	Overview of the ClinixPM Screens	
	Searching for data using the Query feature	
	Query within a Query	
	ClinixPM Wildcard	
	The Different Types of Lookups	
	Sticky Cursors	
	Help Messages	
	Logging out of ClinixPM	