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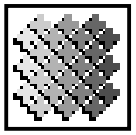
The Avanta® Advantage



AVANTA
MEDICAL INFORMATION SYSTEMS

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Introduction

This manual will help you master the Group Functions area of your Avanta System. You will learn to make groups, use groups, customize groups, use the MedBase Group Builder, and generally be more productive and efficient with Avanta groups.

Section One: How to Make Groups

Foreword

When you make a group you are creating and working on a current group. Like your current patient, your current group is the most recent and is affected by all your commands. Each time you change your current group, you are deleting your previous current group. The system will warn you about this, with the following message: WARNING – This process will DELETE your current group. The default answer is **[N]o**, however by pressing the **[Y]es** key, you can verify that you would like to continue and overwrite the current group. Throughout the Group Building Process, you will run across this message several times, and in this manual it will be noted as, ***WARNING.** If you would like to save your current group before overwriting it with a new current group, please see Saving a Group in Section Two.

In order to display your current group: Press **[9]** Group Functions, Press **[1]** Edit Current Group, and Press **[1]** Display Patients In Group. Throughout this manual, these instructions to display your group will be noted as, ***DISPLAY.** See Editing a Group in Section Two, for additional display options.

If you use practice security, the system stores groups under each user's password. If you do not use practice security, the system stores groups by terminal number.

Accessing Group Functions is done from the Home Screen by pressing **[9]** Group Functions, or **[A]** Appointment Scheduler. Pressing **[2]** Make New Current Group, from the group functions menu, then allows you to make a new group from any of the following criteria:

- Patient Name
- Record Number
- MedBase Group Builder
- Convalescent Hospital
- Acute Hospital
- From the Appointment Scheduler

Patient Name

The first way to make a new current group is by patient name:

1. Press **[9]** Group Functions from the Home Screen.
2. Press **[2]** Make New Current Group.
3. Press **[1]** Make Group by Name.
4. ***WARNING**: Answering **[Y]** will delete your current group.
5. Follow the prompts on the screen to enter the patients' names.
6. Repeatedly press **[enter]** to return to the Home Screen when you are finished.
7. ***DISPLAY**: You can now display the patients in your current group.

Record Number

The second way to make a new current group is by record number:

1. Press **[9]** Group Functions from the Home Screen.
2. Press **[2]** Make New Current Group.
3. Press **[2]** Make Group by Record Number.
4. ***WARNING**: Answering **[Y]** will delete your current group.
5. Follow the prompts on the screen to enter the patients' record numbers.
6. Repeatedly press **[enter]** to return to the Home Screen when you are finished.
7. ***DISPLAY**: You can now display the patients in your current group.

MedBase Group Builder

The third way to make a new current group is by using the MedBase Group Builder. Please refer to The MedBase Group Builder in Section 4.

Convalescent / Acute Hospitals

The fourth and fifth ways to make a new current group are by convalescent and acute hospitals:

1. Press **[9]** Group Functions from the Home Screen.
2. Press **[2]** Make New Current Group.
3. Press **[5]** Make Convalescent Hospital Group.

OR

1. Press **[6]** Make Acute Hospital Group.
2. ***WARNING**: Answering **[Y]** will delete your current group.
3. Select the number(s) of the convalescent or acute hospital(s) you want and press **[enter].**
4. Repeatedly press **[enter]** to return to the Home Screen when you are finished.
5. ***DISPLAY**: You can now display the patients in your current group.

Making Groups from Schedules

The final way to make a group is from the appointment scheduler, which is most commonly used for printing superbills:

1. Press **[A**] Appointment Scheduling from the Home Screen.
2. Press **[shift] + [F8]** Make Group From Schedule.
3. Select the date range to be included in the group.
4. Select the minimum appointment length.
5. Select the days of the week to be included in the date range.
6. Select the time of day to be included in the date range.
7. Select the resource to be included.
8. Press **[tab]** to make the group.
9. ***DISPLAY**: You can now display the patients in your current group.

Examples / Notes

Section Two: How to Modify Groups

Modifying / Using a Group

After you make a new current group, you can modify/use it in many different ways:

- Edit
- Sort
- Save
- Recall
- Delete
- Print the Group
- Print Forms for Group
- Run Reports for Group
- Use Special Functions
- Use Quick Access

Editing a Group

The first way you can modify your group is to press **[1]** Edit Current Group, from the Group Functions Menu. You will be presented with the following options:

- Display Patients in Group
- Delete Patients from Group
- Add Patients by Name
- Add Patients by Record Number
- Add Patients by Family

When you select any of these options, the system will guide you through the appropriate steps. Display Patients in Group shows all of the patients in your group and offers these additional options:

- **[S]:** to select or re-select patients in your group.
- **[D]:** to de-select patients and continue working with the remaining patients in the group.
- **[+N]:** to add duplicates of the selected patients to the group. For example, +3 would add a patient three additional times to your group.
- **[RUB]:** to delete patients from the group. The **[RUB]** key may be the noted as the **[Delete]** or **[backspace]** key on your keyboard.
- **[TAB]:** to go to the next page, if your group overruns one page.
- **[Home]:** to exit back to the Edit Group Screen.

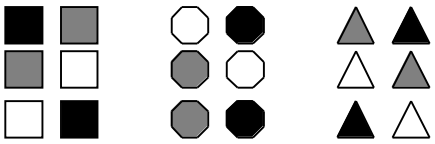
Sorting a Group

The second way you can modify your current group is to press **[4]** Sort Current Group from the Group Functions menu. You can select both primary and secondary sort options, from the following list:

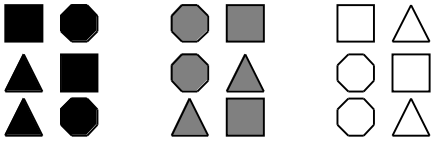
- Patient Name
- Record Number
- Patient Zip Code
- Billing Party
- Patient Balance
- Primary Provider
- Primary Insurance
- Referring Physician
- Attorney
- Birth Date
- Chart Number

When you sort a group, the primary sort is the dominant sort, while the secondary sort is an additional subordinate sorting option. For example:

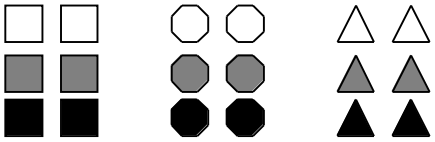
This is a primary sort by shape.



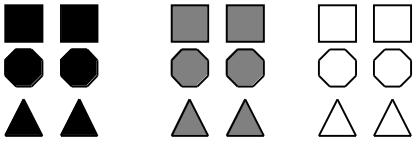
This is a primary sort by shade.



This is a primary sort by shape, with a secondary sort by shade.



This is a primary sort by shade, with a secondary sort by shape.



Saving a Group

Because you delete your current group every time you make a new current group, you may want to save a group for future reference, or to use it as an input source for the group builder. See The MedBase Group Builder in Section 4 for details on this feature. There are two different ways to save a group:

The first way to save a group:

1. Press **[5]** Save Current Group from the Group Functions menu.
2. Enter a name for your group (up to six characters) and press **[enter]**.

The second way to save a group:

1. Press **[2]** Make New Current Group from the Group Functions menu.
2. Press **[4]** Medbase Group Builder
3. Press **[2]** build Patient Group.
4. ***WARNING**: Answering **[Y]** will delete your current group.
5. Select a definition (name) to be used, and select the input source.
6. Answer **[Y]** to save the group in addition to making it your current group.
7. Enter a name for your group (up to six characters) and press **[enter].**

Recalling a Saved Group

Once a group has been saved you will need to recall it in order to use or modify it. You can recall a group you have saved, or a group that another user has saved.

To recall your own group:

1. Press **[6]** Recall Saved Group from the Group Functions menu.
2. ***WARNING**: Answering **[Y]** will delete your current group.
3. Select the group you want to recall from the list the system displays.
4. The group is now your current group.

To recall another user's saved group:

1. Press **[9]** Recall Other User's Group from the Group Functions menu.
2. ***WARNING**: Answering **[Y]** will delete your current group.
3. Select the user whose group you want to recall.
4. Select the group you want to recall from the list the systems displays.
5. The other user's group is now your current group.

If you recall a group and modify it, be sure to re-save it if you think you will need it again in the future.

Deleting a Group

When you no longer need a group you have saved, you can delete it so it does not waste disk space and clutter your screen. To delete a saved group:

1. Press **[7]** Delete Saved Group from the Group Functions menu.
2. Select the group you want to delete from the list the systems displays.
3. Verify that this is the group you want to delete by pressing **[Y]** when the system asks you to confirm your deletion.

Eliminating Duplicates in a Group

If you accidentally enter a patient in your group more than once, you can easily remove the duplications by selecting **[A]** Eliminate Duplicates in Group from the Group Functions menu. Select the group you want to process. The system does the rest automatically and returns you to the Group Functions menu when it is finished.

Examples / Notes

Section Three: How to Use Groups

Printing a Group

You can print a list of the patients in a group, including each patient's name and record number. To print a group:

1. Press **[8]** Print Current or Saved Group from the Group Functions menu.
2. Select the group you want to print.
3. Proceed with the printing questions as you normally do to print your group.

Printing Forms for a Group

You can print either statements or insurance forms for your group. In addition, you can perform electronic billing for a group.

To print statements for a group:

1. Press **[5]** Print Statements from the Home Screen.
2. Press **[4]** Process Current Group.
3. Proceed with statement questions as you normally do.

To print insurance forms or perform electronic billing for your group:

1. Press **[6]** Insurance Billing from the Home Screen
2. Press **[4]** Red HCFA – 1500 Forms
3. Press **[4]** Process Current Group
4. Proceed with the insurance form or electronic billing questions as you normally do.

Running Reports for a Group

You can run most Avanta reports for a group, which is a quick way to get an idea of what a report looks like. This feature also allows you to report on only the specific patients, diagnosis, treatments, physicians, date range and most other general patient and patient ledger data. Some of the reports you may want to run for a group are:

- Patient Data Reports
- Insurance Re-Billing
- Patient List
- Referring Source Report
- Labels/Envelopes
- Patient Visit Sheets
- Workers' Compensation Forms
- Word Perfect Mail Merge

Using Special Functions with a Group

To use Special Functions with your group, press **[C]** Special Functions from the Home Screen. This will allow you to process the following options:

The first option is to delete a group of patients:

1. Press **[A]** Delete Patients from the Special Functions menu.
2. Press **[4]** Process Current Group.
3. Select **[1]** to List/Print Patients in Group.

OR

4. Select **[2]** to Delete Zero-Balance Patients in Group.

The second option is to edit posted ledger items:

1. Press **[C]** Edit Posted Ledger Items from the Special Functions menu.
2. Press **[4]** Process Current Group.
3. Select **[1]** to change flags using Date of Service.

OR

4. Select **[2]** to change flags using Posting Date.

You may change any of the following flags: Primary Insurance, Secondary Insurance, Statement, and Accept Assignment.

The third option is to change several patients' demographic data at once:

1. Press **[K]** Change Patient Data from the Special Functions menu.
2. Press **[2]** Process a Group.
3. Select the group you would like to process.
4. Select the changes you would like to implement.

You may make changes on the following options for your group: Condition Codes, Plan, Primary Insurance Company, Insurance Type, and Patient Billing Settings.

Using Quick Access with a Group

With Quick Access, you can access several system functions for the patients in your group without having to call up each patient individually. You can use Quick Access after you create your group by:

1. From the Home Screen, press and hold down the function key (either **[F12],** or **[FUNC]** depending on you keyboard) and **[Q]** simultaneously.
2. The name of the first patient in your group appears in the Current Patient field in the lower left section of the screen.
3. Press your function key followed by **[>]** to scroll forward through your group.
4. Press your function key followed by **[<]** to scroll backward through your group.
5. As you scroll through your group, select the system function you want to perform using the following function keys:

- **[F1]** Enter Patient Data
- **[F2]** Post Charges
- **[F3]** Post Payments / View Ledger
- **[F4]** Display Patient Balance
- **[F5]** Print Statements
- **[F6]** Insurance Billing
- **[F7]** Recall Data
- **[F8]** Patient Notes
- **[F9]** MedChart

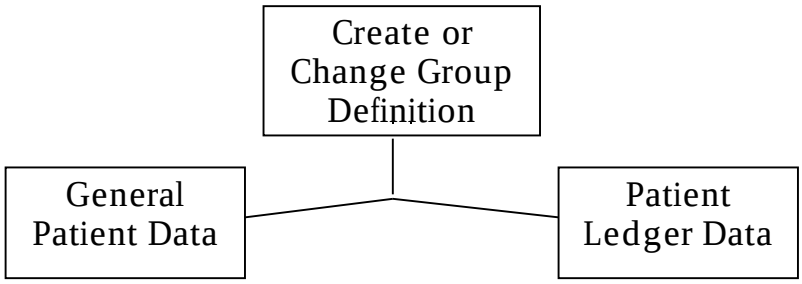
If you leave Quick Access to call up a patient outside the group, you can return to where you left off in your group by holding down the function key and pressing **[R]** at the same time.

Examples / Notes

Section Four: MedBase Group Builder

MedBase Definition's

The MedBase Group Builder is one of the most powerful tools on your Avanta system. It allows you to compile specific information according to a user created definition, utilizing two main sections. The two sections to take into account when creating a definition in the MedBase Group Builder are General Patient Data, and Patient Ledger Data.



- Assigned Physicians
- Insurance Data
- General Patient Data
- Condition Codes
- Attorneys
- Acute Facilities
- Convalescent Hospitals
- Outside Labs
- Demographic Diagnoses
- Record Number Range
- Plans / Plan Types
- Employers
- Treating Physicians
- Insurance Types
- General Ledger Data
- Free Form Memos
- Diagnoses
- Treatments / Groups
- Place of Service
- Convalescent Hospitals
- Outside Labs
- Acute Facilities
- Pay Groups
- Credit Distribution

Symbol Description

To create your definitions mark the items using the following symbols:

- All of the patients in your group must meet ALL of the items marked with the **[+]** symbol.
- All of the patients in you group must meet AT LEAST ONE of the items marked with the **[*]** symbol.
- All of the patients in your group must NOT MEET ANY of the items marked with a **[-]** symbol.

If you are looking for patients who have a specific doctor, you would mark that doctor with a **[+]**. This would result in only patients who have this one doctor. If you are looking for patients who have any one of several doctors, you would mark all the applicable doctors with a **[*]**. This would result in all patients who have any of the marked doctors. If you are looking for all patients who do not have a specific doctor, you would mark that doctor with a **[-]**. This would result in all patients who do not have that one specific doctor.

Creating MedBase Definitions

Groups can be defined by including or excluding patients who fall into any of the selection categories. To create a definition in the MedBase Group Builder:

1. Press **[2]** Make New Current Group from the Group Functions menu.
2. Press **[4]** MedBase Group Builder.
3. Press **[1]** Create Group Definition.
4. Enter a name, up to 20 characters, for your group definition.
5. Select the section you want to create your definition from; either General Patient Data or Patient Ledger Data.
6. Make your selection from the data sub-fields, and mark your selections with either a **[+]**, **[-]**, or **[*]**.
7. Press **[enter]** repeatedly to return to the MedBase Group Builder menu when you are finished, where you can continue to build your patient group.

Building a MedBase Group

Once you have created or changed the definition of your group, you are ready to build your group. To build your group, follow these steps:

1. Press **[2]** Build Patient Group from the MedBase Group Builder menu.
2. ***WARNING**: Answering **[Y]** will delete your current group.
3. Select the definition to be built from the list.
4. Select the input source to build your group from: either all patients or a previously sorted group. (See, Using a Saved Group in section 4)
5. The system informs you that the group you are about to build will become your current group. If you want to save your current group for future use, answer **[Y**], and enter a new name for the group to be saved. If you do not want to save the group, it will be stored as your current group.
6. The system builds the group.
7. ***DISPLAY**: You can now display the patients in your current group.
8. Optional: To ensure that your group was defined correctly you can pick a few of the patients from your built group, and check their demographics/ledger information to ensure they meet only the desired criteria.

Changing a MedBase Definition

Once you have created a definition, you can change that definition to include a new current date range, or different criteria. To change a MedBase Definition:

1. Press **[3]** Change Group Definition from the MedBase Group Builder menu.
2. Select the definition to change from the list displayed.
3. The system asks if you want to clear your group definition. If you press **[Y**], then your previous selections for the definition will be cleared. If you press **[N**], your previous selections for the definition will remain unchanged.
4. Select the section you want to make changes to; either General Patient Data or Patient Ledger Data.
5. Make your selection from the data sub-fields, and mark your selections with either a: **[+]**, **[*]**, or **[-]**.
6. Press **[enter]** repeatedly to return to the MedBase Group Builder menu when you are finished making your changes, where you can continue to build your group.

Printing a MedBase Definition

You can use the print option to determine if something was defined incorrectly or to see if you left something out. To print your group definition:

1. Press **[5]** Print Group Definition from the MedBase Group Builder menu.
2. Select the name of the definition to print
3. Proceed with the printing questions as you normally do, to print your definition.

Deleting a MedBase Definition

After you are finished with your definition, and you do not intend to use it again, you can delete it: To delete a MedBase Group definition:

1. Press **[4]** Delete Group Definition from the MedBase Group Builder menu.
2. Select the definition you want to delete from the list it displays.
3. Verify that this is what you want to delete by pressing **[Y]** when the system asks if you to confirm the deletion of your definition.

Using a Saved Group

Sometimes it is necessary to run a group through the MedBase Group Builder more then once using a different definition. This process requires saving your current group and selecting it as your input source to build a new group. There are two different ways to save a group.

The first way to save a group:

1. Press **[5]** Save Current Group from the Group Functions menu.
2. Enter a name for your group, up to six characters, and press **[enter**].

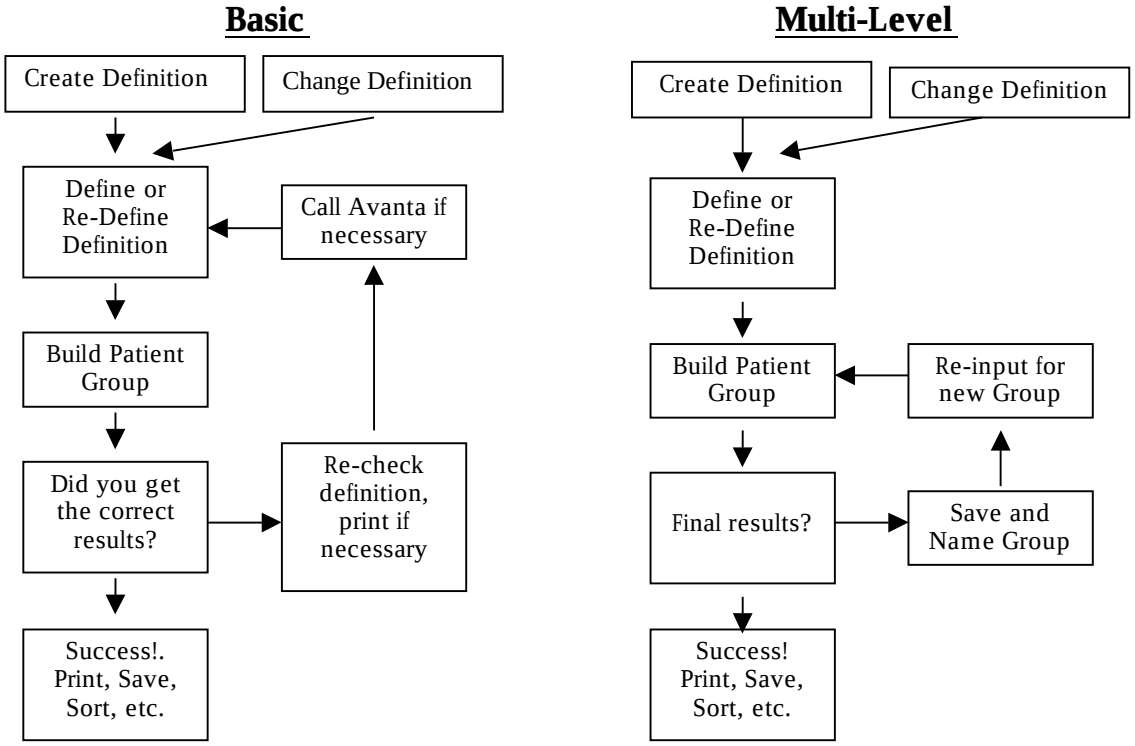
The second way to save a group:

1. Press **[2]** Make New Current Group from the Group Functions menu.
2. Press **[4]** MedBase Group Builder
3. Press **[2]** Build Patient Group.
4. ***WARNING**: Answering **[Y]** will delete your current group.
5. Select a definition to be used, and select the input source.
6. Answer **[Y]** if you wish to save the group in addition to making it your current group.
7. Enter a name for your group, up to six characters, and press **[enter**].

Once you have saved your group it is possible to run it through the Group Builder under different criteria to further define your saved group.

1. Press **[2]** Build Patient group from the MedBase Group Builder.
2. ***WARNING**: Answering **[Y]** will delete your current group.
3. Select the definition to be used to build this new group.
4. Press **[2]** Process a Group as the input source to build this group.
5. Select the name of the group that was previously saved.
6. If you wish to save your new group under another name, so that you can run additional filters, you can do so at this time. Answer **[Y]** to the question, and follow the instructions above.

The MedBase Groupbuilding Process



1. Create a new Group Definition or change an existing Group Definition.
2. Define your new current group using General Patient Data, Patient Ledger Data or a combination of both.
3. Create your definitions using the following symbols: must meet ALL of the conditions marked **[+**]; must meet AT LEAST ONE of the conditions marked **[*]**; must NOT MEET ANY conditions marked **[-]**.
4. Once defined, you can build your group.
5. If your results are correct, you can print, save, sort, or re-input the results.

   OR
6. If your results are not correct, you can either re-check your definitions by going through the Changing a Medbase Definition instructions and answering **[N]** to clear your group definition, or you can print your definitions using the Printing a MedBase Definition instructions.
7. Once your definitions are correct you can re-input your group through the Groupbuilder, and continue with step 5.
8. If your results are still not correct you can call Avanta at **(800) 9-AVANTA** for assistance.

Section Five: Summary / Examples

Summary

Group Functions allows you to make groups of patients from the following criteria: patient name, record number, convalescent hospital, acute hospital, and through the appointment scheduler. Once the group is made it can be modified or utilized in many different ways, you can: edit, sort, save, recall, delete, print, post to, print forms for groups, run reports for groups, use special functions with, and use quick access.
The MedBase Group Builder allows you to use the system's database to locate patients who match your specific definition. There are two main sections to consider when creating a new group definition in the MedBase Group Builder, General Patient Data, and Patient Ledger Data. Once the definition has been created build your group, and save if necessary for re-use.

Examples / Notes

Q: Who are the new patients referred by Robert Baum, M.D. in the month of November?

- Patients with no ledger activity before 10-31-98. This would include all patients who had never been in the office before November.
- Patients with visits between the dates of 11-01-98 and 11-30-98. This would restrict that those patients had, however been in the office during the month of November.
- Patients with Robert Baum, M.D. as their referring physician. This would restrict that Robert Baum, M.D referred those patients, who had never been in the office prior to November, but had been in during the month of November.

Q: Which cash or private patients have a $10 or more dollar balance, that is over four months old, and have not made a payment in the last two months?

- Patients with:

- Patients with:

- Patients with:

Q: Which two-year-old patients did not come in for a booster shot last year?

- Patients with:

- Patients with:

- For the date range:

Q: Which Secure Horizons patients with a diagnosis of conjunctivitis or myopia did Marcus Welby, M.D. or Ivan Feelgood, M.D. see during the first half of 1999?

- Patients with diagnosis of:

- For the Date Range:

- Patients with:

- Patients treated by:

*Hint: you will need to build three groups.

- Group of patients who have either diagnosis, which are in the date range, and are members of the plan.
- Marcus Welby M.D. as treating physician.
- Ivan Feelgood M.D. as treating physician.

Notes