

BEFORE YOU BEGIN

SequelMed requires nothing more than a Windows-based computer and offers “point and click” as well as “hot keys” ease of use and a graphical interface utilizing pictures and icons.

All data to be entered is provided in easy to read, highlighted fields of entry and each field provides its own on-line help through a built in user help interface. This package is as easy to use as a word processor; yet, it is powerful enough to allow you to conduct virtually every function of practice management. In addition, any required updates are performed in minutes using other related software in the form of utility and security applications provided by Sequel Systems.

This will provide users not only with step-by-step directions but also to illuminate the purpose and logic behind the various windows/screens, fields and buttons used in the application.

2-1 Layout of SequelMed

SequelMed provides several features (fields, buttons, icons and terms) that the user should be familiar with. These commonly used features will make learning SequelMed easier. Please familiarize yourself with the following layout features of SequelMed before you continue:

<u>Feature</u>	<u>Description</u>
Title bar	Located at the top of the window, the title bar displays the name of the product, the selected patient and the name of the window displayed.
Menu bar	Located directly below the title bar, the menu bar enables you to select menu commands from drop-down menus.
Tool bar	Located directly below the menu bar, the toolbar enables you to select tasks to be performed by clicking on various icons.
Icons	Graphic symbol/picture that initiates an action
Short Cut and Hot Keys	SequelMed is a user-friendly application. Features are available for the users who are comfortable operating applications with keyboards. Shortcut Keys are provided throughout the application and work respectively with combinations of "Alt", "Ctrl", "Shift", "Function" keys and alphabets on your keyboard. This is described in more detail in "Main Menu Short Cut Keys" and "Main Sub Menu Short Cut Keys" sections.
Field	A column capable of carrying (editing, inserting) information. This is where you fill in the information (for example, patient names, date of birth, name of plan, provider, location, etc., etc.)

Field Name The title beside or on top of a field/fields, usually appearing in black (such as Last Name, First Name, Plan, Provider, Group, etc., etc.).

Blue Field Names Within the application you will see many field names that appear in blue. These fields are mandatory or required fields. It is imperative to fill these fields completely and accurately for correct processing of the information.

Gray Fields Within the application, whenever the fields are grayed this means that the particular field is not editable. In other words, you cannot change the information appearing in this fields within the particular window as the system generates the information in these fields based on information provided initially.

Login The process of running the SequelMed after entering the user name and password

2-2 Find Window

Throughout the system, the Find window is consistently utilized to enable the user to search for data. The Find window is based on two criteria: Find/Search Criteria and Found Data.

Find/Search Criteria: Search criteria are used to tell SequelMed what data to display when the user performs an inquiry. A number of fields are displayed in the search criteria section of the browse windows. The nature of the fields will vary depending upon what type of search the user is performing. The user can enter data into as few as one of the fields or as many as all available fields. The data placed in these fields will be used to narrow down the search. If no information is placed in any of the search criteria, all records will be retrieved, which can also be retrieved by checking the 'Retrieve All' box.

Note: Clicking the 'Find' button will execute the search.

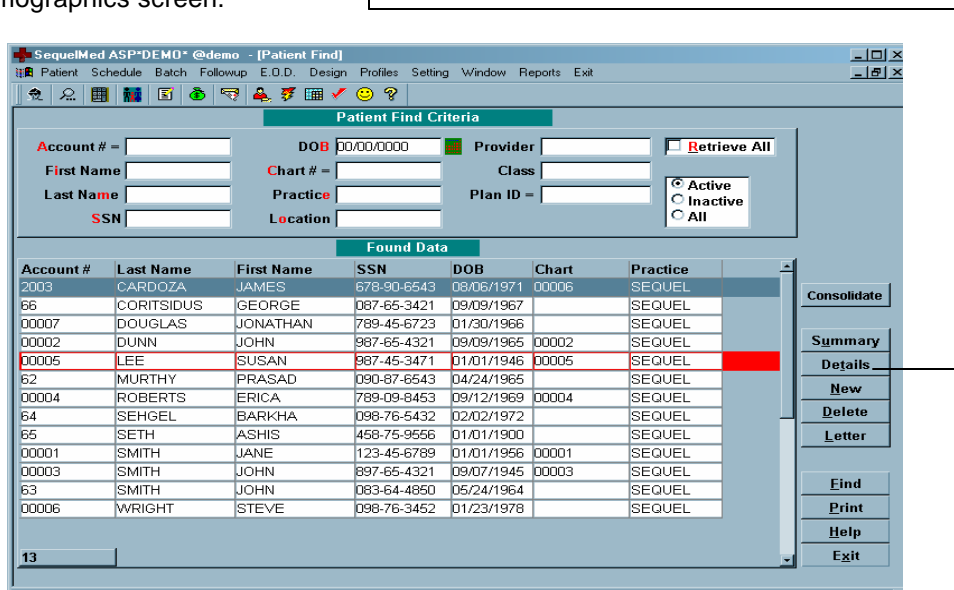
Example: In the Patient Inquiry screen, you can narrow down your search for a patient or group of patients by entering all or part of the patient's first name and/or last name in the search criteria. If you just enter the last name "Smith" in the 'Last Name' field and click on 'Find', all patients with the last name "Smith" will be retrieved. If you enter the last name "Smith" in the 'Last Name' field and "Mary" in the 'First Name' field, only patients named "Mary Smith" will be displayed.

Account #	Last Name	First Name	SSN	DOB	Chart	Practice
2003	CARDOZA	JAMES	678-90-6543	08/06/1971	00006	SEQUEL
66	CORITSIDUS	GEORGE	067-65-3421	09/09/1967		SEQUEL
00007	DOUGLAS	JONATHAN	789-45-6723	01/30/1966		SEQUEL
00002	DUNN	JOHN	987-65-4321	09/09/1965	00002	SEQUEL
00005	LEE	SUSAN	987-45-3471	01/01/1946	00005	SEQUEL
62	MURTHY	PRASAD	090-87-6543	04/24/1965		SEQUEL
00004	ROBERTS	ERICA	789-09-8453	09/12/1969	00004	SEQUEL
64	SEHGEL	BARKHA	098-76-5432	02/02/1972		SEQUEL
65	SETH	ASHIS	458-75-9556	01/01/1900		SEQUEL
00001	SMITH	JANE	123-45-6789	01/01/1956	00001	SEQUEL
00003	SMITH	JOHN	897-65-4321	09/07/1945	00003	SEQUEL
63	SMITH	JOHN	083-64-4850	05/24/1964		SEQUEL
00006	WRIGHT	STEVE	098-76-3452	01/23/1978		SEQUEL

Found Data: The Found Data section of a browse window will display all records retrieved as a result of a search. By right-clicking on a column, you will be given the option to sort the found data in the column in ascending or descending order. You can also use “filters” to modify the way found data is displayed. If, for example, you found data is displaying a list of charges for multiple dates, you can right-click on one of the dates, click on ‘Do Filter’ and now only charges for that specific date will be displayed. To remove the filter and display all found data again, just right-click on the same field and click ‘Un-Filter’.

There are also several buttons located to the right of the found data in the Browse window. The nature of these buttons varies depending upon the window you are in, and they will allow you to jump to other places in the system.

Example: In the Patient Inquiry screen, once you have done a find, you may want to view the demographics for one of the patients retrieved. Just click on the patient you want to view, which will highlight the patient, and then click on the ‘Details’ button to the right of the found data in order to jump to the patient demographics screen.



2-3 Common buttons used in SequelMed

Below are the common buttons used in SequelMed. Their functions are same everywhere, unless otherwise specified in the help documentation of the respective window(s)/screen(s).

<u>Button</u>	<u>Description</u>
Find	Finds the information based on the specified criteria
Select	Selects the specified information in a particular window/screen
New	Refreshes the window to allow you to enter new information
Print	Prints the specified information
Save	Saves the specified information
Delete	Deletes the specified information

Help	Takes you to the Help file of the window you are working in
Exit	Exits from the current window

2-4 Common Fields used in SequelMed

Below are the common fields used in SequelMed. Their functions are same everywhere, unless otherwise specified in the help documentation of the respective window(s)/screen(s).

<u>Field</u>	<u>Description</u>
Retrieve All	This checkbox retrieves all the specified information in a particular window/screen
Select All	This checkbox, when checked, selects all the specified information in a particular window/screen. For example, if you want to select all the patients displayed when the patients are found using the Find button in the Patient Find Criteria window/screen, check the “Select All” box, which will highlight all the displayed records.
User/You	The person who is operating the computer

2-5 Letter Button in SequelMed Windows

The “Letter” button in many windows allows you to print letters for correspondence with patients, plans, practices and referring providers for the information found in the reports. When you click the ‘Letter’ button, the Correspondence window opens up and lets you select the desired Letter from the Letter Categories created in Microsoft Word. In this section you will find the description of what kind of letters you can print in SequelMed. There are eight types of letters:

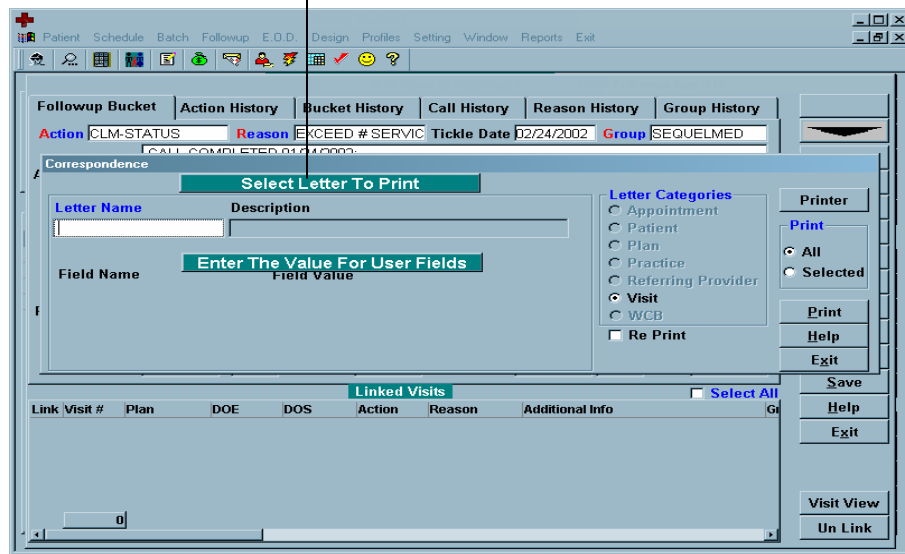
1. Appointment
2. Patient
3. Plan
4. Practice
5. Referring Provider
6. Visit
7. Follow Up
8. Recall

Field

Letter Name

Description

Opens up the “Correspondence” window to select a desired letter from the list of pre-created letters.



The field Letter Name shows you the short name you selected at the time you created the letter. In order to print the correct information in the letters you must add correct bookmarks in the Microsoft Word document. When you type a letter while the cursor is blinking in the Field Name field, a list of all the available fields that can be used in the letters appears. Write down the desired fields on paper exactly as they appear including the underscores. Use the names as bookmarks in Microsoft Word document exactly as you noted from the list. If the bookmark is even slightly different, the value will not appear in the letter of correspondence.

Description

The Description field will show the description of the selected letter from the Letters

Letter Categories	The group box labeled Letter Categories shows the types of letters that can be printed from this screen.
Print	The group box labeled Printer has two options for printing: All and Selected. If All is clicked then the selected letter will be printed for all the patients retrieved and if Selected is clicked then the letter will be printed for only the selected patient.
Enter the Value For User Fields	The section labeled Enter The Value For User Fields shows you the fields you specified while creating the letter under Field Name and will ask you for an input under Field Value.

<u>Button</u>	<u>Description</u>
Printer	Allows you to select a pre-installed printer to print specified letter
Print	Prints the specified information
Help	Takes you the Help file for this window
Exit	Lets you exit out of the current window