

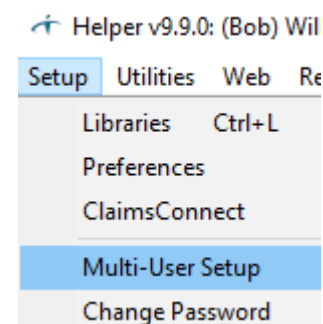


Helper Version 9.9.0 Features

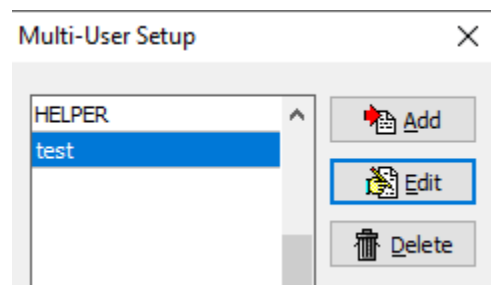


Added the option to make users only able to view facesheets.

If wish to restrict a user to be only able to view a facesheet and make no changes to it. You will need to edit the Multiuser name. First, Go to Settings in the upper left of he Helper window. Then select Multiuser.

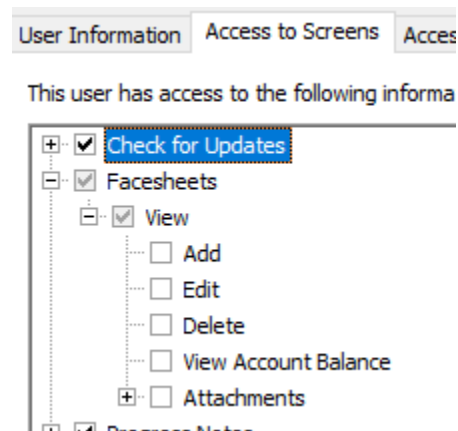


This will load the Multiuser list.



Highlight the name you want end click Edit.

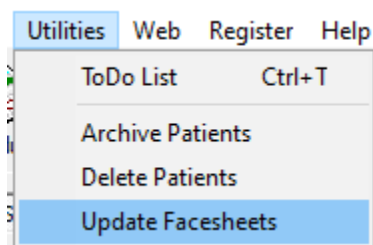
On the next window, go the tab Access to Screens.



Under Facesheets, deselect everything under view. Then click save. Finally, close the Multiuser window. The next time this users opens Helper, they will be restricted to only view Facesheets.

Updated the Update Facesheets Utility.

Now, inactive Therapist will be selectable when filtering for therapist name.



Go to Utilities and select Update Facesheets.



Update Facesheets

Use this wizard to update selected information on the F

Select the steps you would like to complete

General patient information

View options for updating patient Library Links, default o
other general fields. This does not affect any transacti

This will bring up the patient list. From here, go to select groups of patients.

🔍 Select groups of patients to update Then review and refine the list of selecte

Select All Deselect All

Drag a column header here to group by that column

Include	Account #	Last Name	First Name	MI	DOB	Provider
<input checked="" type="checkbox"/>	V	Diagnosis	Test	M		Chris Newman, Ph
<input checked="" type="checkbox"/>	A	Gallagher	William	Y	1/1/1960	Chris Newman, Ph
<input type="checkbox"/>	AT	Middle Initial	First Name			



Save Day option has been changed to no longer display inactive providers.

Provider Credit Card set up screen.

When you edit the provider's name. Go to Setup/Libraries. Select therapist/provider.

The screenshot shows the 'Setup' menu open, with 'Libraries Ctrl+L' selected. Below the menu is a tree view on the left with 'Providers' highlighted. The main window displays a table of providers.

ID	Status	Last Name	First Name	MI	Address 1	Address 2	City	St	Zip Code	Phone
A	Green	Newman	Chris		4950 College Blvd.		Overland	KS	6621116	(617)
C	Red	Ryan	Jack		4950 College Blvd.		Overland	KS	6621116	

Highlight the Therapist name and select Edit at the bottom of the window.

The screenshot shows the 'Credit Card Info.' tab selected. It contains a form with the following fields:

- Merchant ID:
- Username:
- Password:
- Additional Text:

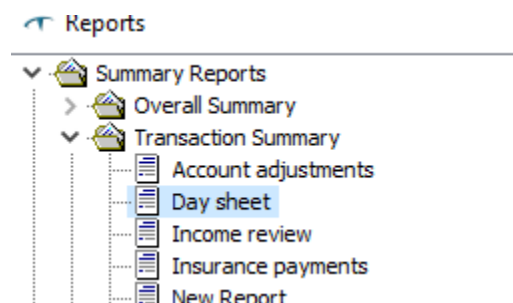
Additional text is displayed on the receipt below the address.



At the bottom of the window you can now add text to display on the Credit Card receipt. Add the text you'd like and click save.

Added a column to the Summary and Transaction Summary Reports

A column has been added to display the patient account number on the reports.



If select any of the reports under Overall Summary or Transaction Summary and run it.

Select transactions:

Between: 4/1/2023

And: 5/1/2023

Today

This Week

This Month

Last Month

Select groups of patients

Select groups of transactions

Report Layout

Click on Report Layout.

General Columns Description & Title Page Set

Print these columns

Date

Description

Patient name

Patient Account Number

billable party name

Procedure Charge

Writeoff

After checking the box for Patient Account Number, the report will not include it when printing the report.



Date	Description	Patient	Account #	Proc Charge	Amount
11/20/2015	Individual Psychother:	Test, Test H	F	\$220.00	\$220.00
12/4/2015	Payment	Test, Test H	F	\$0.00	(\$10.00)
12/4/2015	Individual Psychother:	Test, Test H	F	\$110.00	\$110.00
1/1/2016	Individual Psychother:	Gallagher, William Y	A	\$80.00	\$50.00
1/8/2016	Individual Psychother:	Gallagher, William Y	A	\$80.00	\$80.00