



# Helper Tips and Tricks Volume 1

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## Transaction Ledger Column Sorting & Filters

Have you opened your Transaction Ledger and noticed it doesn't look right? There are 2 things to review for this.

The most common issue is the transactions are no longer in order of date. To correct this, take your mouse and click on the word "Date" at the top of the Date column. The ledger will go back to be ordered by date as shown below.

Date	Amount	Total Charge	Patient	Transaction Type	Billable Party
2/8/2021	\$110.00	\$110.00	David Z King	Session	
2/18/2021	\$110.00	\$110.00	David Z King	Session	
2/23/2021	\$110.00	\$110.00	David Z King	Session	
2/23/2021	\$25.00	\$45.00	David Z King	Session	
3/3/2021	\$80.00	\$110.00	David Z King	Session	
3/9/2021	\$110.00	\$110.00	David Z King	Session	
3/9/2021	\$110.00	\$110.00	David Z King	Session	
3/10/2021	\$110.00	\$110.00	David Z King	Session	
5/7/2021	\$110.00	\$110.00	David Z King	Session	

Another frequent issue is that the ledger is only showing transaction types for one of the other column types. Look at the gray bar just above the column titles. Drag this down to the grid below to remove the filter. (Transaction Type in the screenshot below) and hold down the button while dragging the title down out of the gray bar. Then place it in the row with the rest of the column titles and release the mouse button.

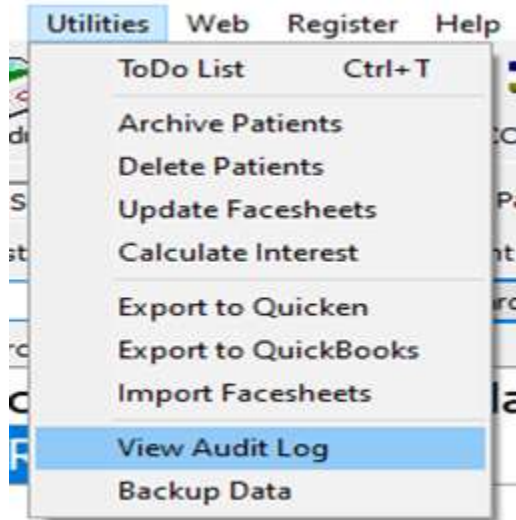
Transaction Type					
Date	Amount	Total Charge	Patient	Transaction Type	Billable Party
2/8/2021	\$110.00	\$110.00	David Z King		
2/18/2021	\$110.00	\$110.00	David Z King		
2/23/2021	\$110.00	\$110.00	David Z King		
2/23/2021	\$25.00	\$45.00	David Z King		

The ledger should now be back to your view, as shown below.

Drag a column header here to group by that column					
Date	Amount	Total Charge	Patient	Transaction Type	Billable Party
2/8/2021	\$110.00	\$110.00	David Z King	Session	
2/18/2021	\$110.00	\$110.00	David Z King	Session	
2/23/2021	\$110.00	\$110.00	David Z King	Session	
2/23/2021	\$25.00	\$45.00	David Z King	Session	

# The Audit Log

There are several useful features in the audit log. It tracks most things done while using Helper. Select Utilities at the top left of the Helper window. From the drop-down list, select View Audit Log.

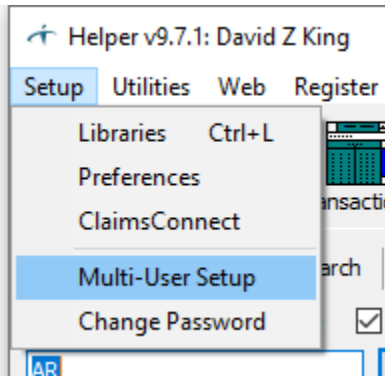


On this screen, you see a lot of information: The date and time of the event, the username that performed the operation, (this is why we recommend you create a separate log in name for each user – see the section below), the section of Helper that was accessed, the patient affected, and the action taken.

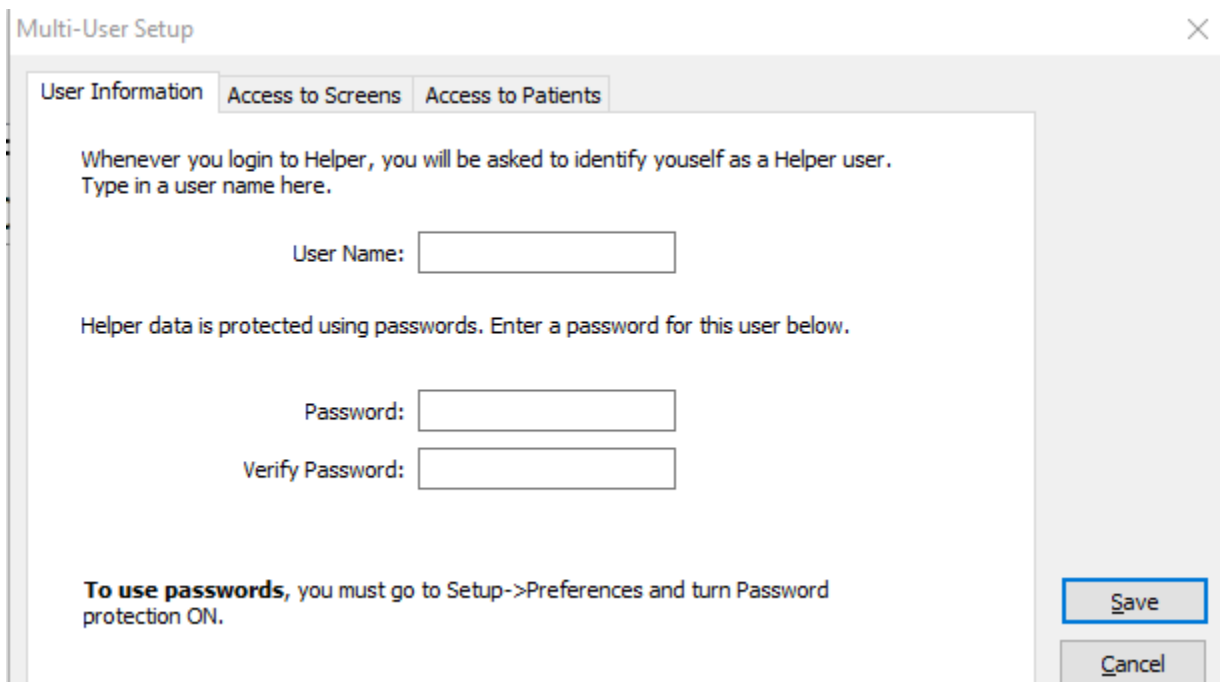
Current Audit Log		Archived Audit Log		
Display From	9/1/2021	to	9/21/2021	Apply
Drag a column header here to group by that column				
Timestamp	Username	Section	Patient	Action
9/1/2021 8:03:54 AM	HELPER	Login		Successful login from Helper
9/1/2021 10:37:19 AM	HELPER	Reports		Print/Preview 1500 (02/12) (new)
9/1/2021 10:38:02 AM	HELPER	Transactions	David Z King [Acct: AR, SSN: ]	Edit [7/20/2021 Session for \$85.00]
9/1/2021 10:38:32 AM	HELPER	Reports		Print/Preview 1500 (02/12) (new)
9/1/2021 10:39:09 AM	HELPER	Transactions	David Z King [Acct: AR, SSN: ]	Edit [7/27/2021 Session for \$300.00]
9/1/2021 10:39:14 AM	HELPER	Reports		Print/Preview 1500 (02/12) (new)
9/2/2021 9:03:59 AM	HELPER	Reports		Print/Preview Aging Report
9/2/2021 12:47:43 PM	HELPER	Reports		Print/Preview Standard Statement
9/2/2021 1:53:40 PM	HELPER	Facesheets	David Z King [Acct: AR, SSN: ]	Edit
9/2/2021 1:54:07 PM	HELPER	Transactions	David Z King [Acct: AR, SSN: ]	Edit [7/20/2021 Session for \$100.00]
9/14/2021 10:06:55 AM	HELPER	Transactions	David Z King [Acct: AR, SSN: ]	Edit [7/27/2021 Session for \$300.00]
9/14/2021 10:08:12 AM	HELPER	Reports		Export/Transmit ClaimsConnect claims
9/15/2021 4:15:47 PM	HELPER	Facesheets	David Z King [Acct: AR, SSN: ]	Edit
9/17/2021 9:05:48 AM	HELPER	Login		Successful login from Helper

## Creating Usernames

Each person that is accessing Helper should have their own Username to log in to Helper. To do this, go to Setup at the top left of the Helper window. Under setup, select Multi-User Setup. See below.



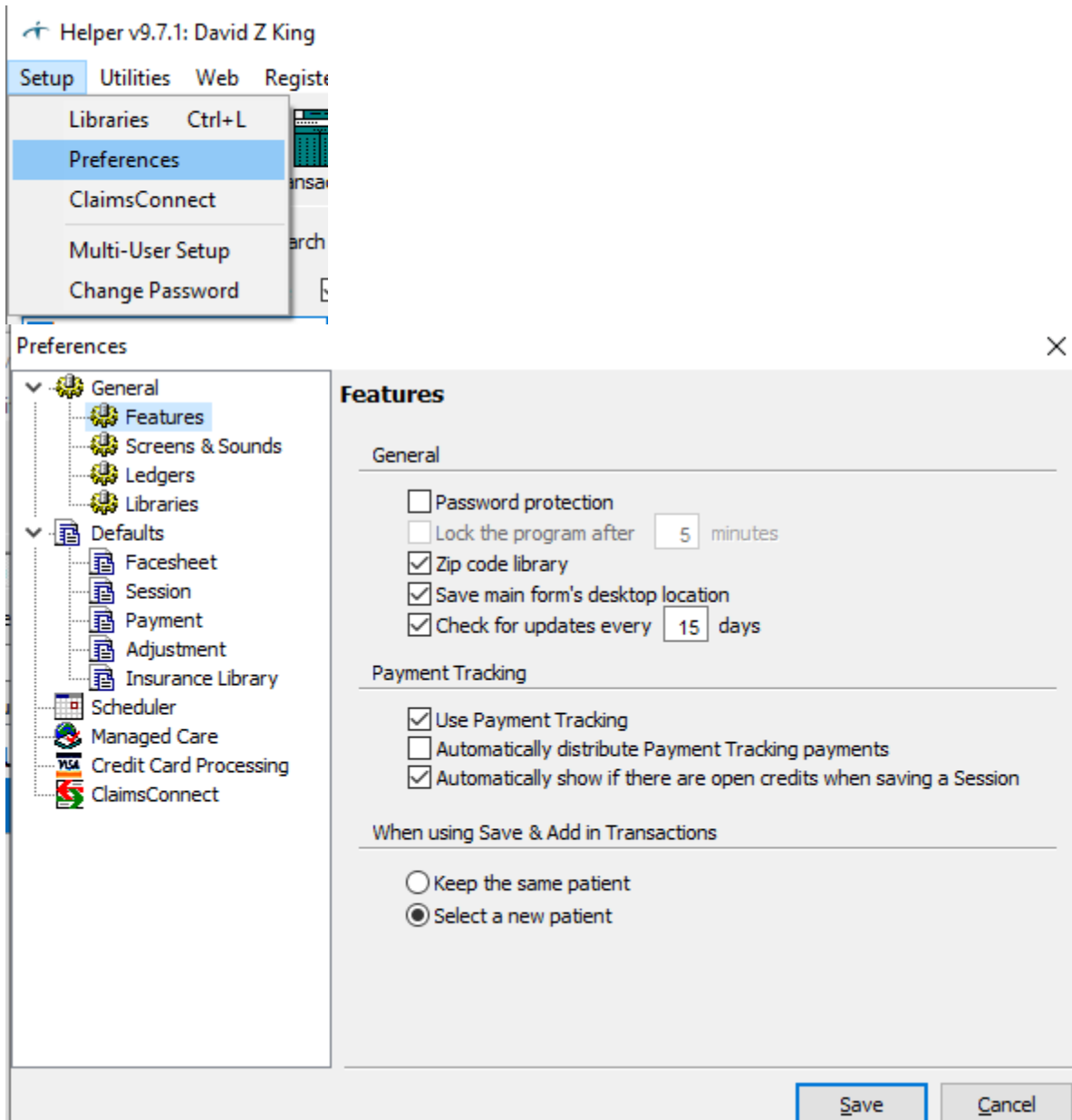
You will now be able to add, edit or create a new username. Select Add. You can now create a username and password. It is important to remember the Helper Support department keeps no records of these passwords. If you forget them, we will not be able to provide them to you.

A screenshot of the "Multi-User Setup" dialog box. It has three tabs: "User Information" (selected), "Access to Screens", and "Access to Patients". The "User Information" tab contains the following text: "Whenever you login to Helper, you will be asked to identify yourself as a Helper user. Type in a user name here." Below this is a "User Name:" label and an empty text box. The next text is: "Helper data is protected using passwords. Enter a password for this user below." Below this are "Password:" and "Verify Password:" labels, each followed by an empty text box. At the bottom left, there is a note: "To use passwords, you must go to Setup->Preferences and turn Password protection ON." At the bottom right, there are "Save" and "Cancel" buttons.

Additionally, go to the Access to Screens tab to allow or restrict this user from being able to use sections of Helper. Remember, at the bottom of this screen, to uncheck the option for administration for this user. Finally, you can use the Access to Patients tab to limit which patient's information this user can see.

## Preferences

Go to Setup and then select Preferences. See below.



Once the Preferences screen is open, we recommend you enable the password protection. Once that is enabled, each time you open Helper you will need to enter the password created in the Multi-User set up. As you look down the left side, you can see the default options you can add.

## Library Filters

The lists and ledger screens can become confusing over time with information you no longer need. We do not recommend you delete this information. What you should do is make them inactive and then filter out the inactive items. One area where this may make sense is for service codes. Quite a few of them become obsolete over time. To clean this ledger, open the services library.

▶ W	Psytx pt&/family 30 minutes	■	90806	125.00	30
C	Individual Psychotherapy	■	90834	110.00	45
Q	Tele Psytx pt&/family 45 minutes	■	90834	125.00	45
R	tele Psytx pt&/family 45 minutes	■	90834	125.00	45
G	Psytx crisis initial 60 min	■	90839	165.00	
H	Psytx crisis ea addl 30 min	■	90840	100.00	
A	Family Psychotherapy	■	90847	45.00	0
B	Group Psychotherapy	■	90853	45.00	45
D	Psychological Testing	■	96101	45.00	30

From this list, edit the code 90806 by double-clicking it.

At the bottom of the window, select inactive and save. Next, move your mouse pointer over the column title Status. A drop-down arrow will be displayed. Click the arrow and select Active. Once complete, all that will be displayed are the active codes.

▶ A	■	Family Psychotherapy	90847	45.00	0
B	■	Group Psychotherapy	90853	45.00	45
C	■	Individual Psychotherapy	90834	110.00	45
D	■	Psychological Testing	96101	45.00	30
H	■	Psytx crisis ea addl 30 min	90840	100.00	
Q	■	Tele Psytx pt&/family 45 minutes	90834	125.00	45
R	■	tele Psytx pt&/family 45 minutes	90834	125.00	45

This same process can be use in all the libraries. You can remove old insurance companies, therapists, etc.

## Patient List Filters

Much like the libraries, the Patient List can be filtered too, making it easier to read. By clicking on any column title, the list will be sorted by that column. You can also hover over a column title and select a filter by clicking the down arrow. For example, move the mouse pointer to the column title Active. Next, select the down arrow and choose Yes. Now only the active patients are displayed.

Account	Last Name	First Name	Active	City
AF	Pest	Alf	Yes	Melmack
AJ	Smith	Bob	No	Overland Park
1234	Test	Corbn	<input type="checkbox"/>	
AR	King	David	<input checked="" type="checkbox"/>	Overland Park
U	Check	DX	<input type="checkbox"/>	
AT	Middle Initial	First Name	<input type="checkbox"/>	City

Account	Last Name	First Name	Active	City	E
AF	Pest	Alf	<input checked="" type="checkbox"/>	Melmack	
AJ	Smith	Bob	<input checked="" type="checkbox"/>	Overland Park	a
AR	King	David	<input checked="" type="checkbox"/>	Overland Park	d
AT	Middle Initial	First Name	<input checked="" type="checkbox"/>	City	
AU	X.	Gl	<input checked="" type="checkbox"/>	Sarasota	
S	Dover	Liz	<input checked="" type="checkbox"/>		