Complete Clinic News

April 2015

Security Alert

Recently one of our clinics was the victim of a theft of over $12,000.00 because they didn't take advantage of the security features in Complete Clinic Software. The employee was manipulating invoice and cash payment records to hide the fact that they were taking cash from the drawer. In a further attempt to hide what they were doing, the employee was also changing the invoice and payment records using an employee code belonging to another employee. The theft was initially discovered when a report that was run earlier in the day, did not agree with the same report run the next day. A subsequent analysis of the clinic's files revealed that the theft had been going on for over 3 years.

Complete Clinic Software contains 74 different procedures that can be passcode protected to prevent abuse or unauthorized access. You can also set up to 9 different user levels to control access to each of these procedures. Because we realize that entering passwords all day long can be counterproductive, the system can also be configured to permit user logins. When a user logs in, they can then access any procedure that is equal to or below their security level without having to enter their password. If they leave the terminal, they should go back to the main screen and click on log out to prevent unauthorized access.

In response to the situation where an operator can create or modify an invoice or payment using someone else's code, we have modified the system to require that the operator enter their password instead of selecting their name from a list or entering their code. The operator code or initials is then assigned to the invoice or payment based on the password that was entered thus preventing attempts to fraudulently assign them to someone else. This is only effective if employees are cautioned to not share passwords and if passwords are changed frequently.

Email Enhancements

Email is fast becoming and efficient and cost effective way for clinics to communicate information to their clients. We are continuing to expand and enhance the email capabilities in the system to make this process easier to use. On April 23, 2015 we released a system update that contained the following email enhancements.

Email Appointment Reminders – we added the ability to email appointment reminders from the appointment calendar form and included 2 appointment reminder email templates.

The procedure selects appointment for the date range specified and allows you to define which calendar columns you want to include. It automatically excludes the following records from your selection request:

1) clients who don't have an email address
2) appointments that are not associated with a client
3) appointments if the pet is deceased

Email Categories

In this same release, we added a field to the email file to categorize email forms according to how they are used. So far we have established the following categories.

1) Appointment reminders
2) Callbacks
3) Clients
4) Estimates
5) Invoices
6) Medical history
7) Patients
8) Reminders
9) Statements

Email form pick lists are then customized according to the email type for each section of the system where emails are used. Variable lists may be different according to the usage category.

Look for additional enhancements as we identify opportunities to better utilize email in the system.

Security Alert

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The following critical activities are the ones we definitely recommend be password protected to prevent fraud and theft.

Client – Create/Change Discounts
Client – Setup/Change Balances
Credit Card, SS#, DL# Change Data
Estimate – Create/Change
(assigns operator code based on the password entered)
Invoice – Checkout Date override
Invoice – Create/Change
(assigns operator code based on the password entered)
Invoice – Delete
Invoice – Invoice Date override
Invoice/Payment - Change Any
(permits changing past invoices)
Payment – Create Adjustment
(affects client balances)
Payment – Receipt Date Override
Payroll – Change/Create Data
Payroll – Delete an Employee

In addition, passwords are also recommended for any activity that deletes client, patient, medical or invoice data and any activity that makes mass changes to files like price increases, sales tax increases, etc.

For specific instructions explaining how to create and maintain system security see the chapter on "Set Security" in the system on-line manual.

There are 2 other security audit features you should be aware of:

1) On each client's account history list, there is a check box that when checked, will display the invoice, payment or adjustment showing the date, time and operator who crested it and the date, time and operator who last changed it.
2) On the <Utilities> <Data Management> menu we have added a "Special Invoice Analysis" report. This report will provide a list of any backdated transactions for the specified time period.

If you suspect you are having security issues, please call our Help Line for assistance at any time.

More Useful Features

Bar Code Scanning - Complete Clinic Software is designed to read two types of barcodes. 1D barcodes consisting of UPC/EAN formats and 2D (QR) codes printed on labels from the CCS System. To use a barcode scanner with Complete Clinic Software, you must either add each products UPC/EAN code to the items inventory record or print a label having a QR code from the inventory record.

After UPC Codes have been entered or QR codes have been printed, you can use a barcode scanner in the following procedures.

1) Scan Item to Look up Inventory Record.
2) Scan Item to add to Invoice.
3) Quick Receiving for Single Items.
4) Scan Items into Purchase Orders.
5) Scan Items for Prescription Labels or Pharmacy Forms

In the very near future, we will add QR codes to the Travel Sheet form and the Physical Inventory Worksheet form and have plans to expand the usage into other areas of the system. If you wish to purchase a barcode scanner compatible with Complete Clinic Software you can order them in the **SHOP** section of our website.

Credit Card Processing - Having trouble reconciling your credit card terminal with your CCS financial summary? Need to quickly look up a credit card transaction that was done last month? Need to charge recurring transactions to your clients but don't want the liability of keeping card numbers on file? Have 2 or more operators waiting to process credit cards at the same time?

If you answered <YES> to any of these questions, why not consider processing your credit cards using your Complete Clinic System. We are competitive and PCI compliant. **If you sign up before May 31, we will provide you with 2 free USB Swipers (a $150.00) value).** Call Software Support for more information at 800-989-6576.

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