August 22, 2013

AVImark Software Support

Theft Deterrent Features

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Audit Trail: You may audit the following functions:

- Override treatment or item prices
- Delete medical history
- Delete account transactions
- Purge files – delete all patient reminders
- Purge files – remove deleted reminders
- Remove clients
- Remove patients
- Change time clock records
- Remove time clock records

How to set up Audit Trail

1) **Set up passwords**

For every employee and make sure they know to not share their password with others. They should always hit F12 when leaving the computer to prevent others from using Avimark while they are still logged in. All users should periodically change their password.

2) **Restrict employee access to their own account:**

In Work With...Users & Security and double-click each employee name. Enter their account number in the Account field. Choose the appropriate "Access Type". There are several access option with "View only" being the most restrictive as it only allows employees to view their records but not change or remove anything.

3) **Require password at logon**:

Check the option "Require Password at Logon" in Hospital Setup on the Miscellaneous tab. This prevents users from opening the program without using a password. Set up the Audit Trail to audit everyone or all but admin for all functions. This doesn˝t prevent users from performing these functions; it simply allows you to print a report showing who performed these functions.

Note: The Audit Trail is not retroactive; if you set it up now, it will not report past changes, however the Delprt utility program will allow you to see accounting that was deleted in the past.

- Go to Work With: System Tables…Audit Trail table. Double click on each table entry that you want to audit and change the „Audit Who˝ from No One to either Everyone or All But Admin.

- If you haven't already done so, go to Work With…Users and Security and give everyone a password.

- In Work With: Hospital Setup: Miscellaneous set the “Start auditing at” time to 12:00a and the “Stop auditing at” time to 11:59p. Check the option to “audit on weekends”.

Delprt utility program:

This program will print a list of everything that has been removed from accounting since the date you specify. It will not show who was logged in at the time the accounting was deleted. You may want to run this utility program periodically especially if you do not have the Audit Trail setup.

Users and Security:

There are many functions that you can protect to prevent users from performing them. Those functions that can also be audited are shown in bold font. If it’s not feasible for you to protect those functions, you can still audit them. Since this list contains functions that could possibly be used for theft, many other functions not connected with this problem and therefore not listed may also need to be protected

Please call technical support if you need assistance setting up Users & Security. If using the Site feature, there are additional security functions you may want to protect.

1. Remove Accounting Transactions
2. Change Posting Date
3. Transfer Invoices
4. Discount Treatments and Items
5. Use Cash Drawer – a new function available in version 178. Users will still be able to take cash payments to open the cash drawer but this will prevent users from going to Utilities>Cash Drawer to open it.
6. Remove Time clock entries
7. Change Time clock Entries
8. Print Time clock Report – protecting this feature prevents users from accessing another user's time card and clocking them in and out.
9. Remove System Tables
10. Remove System Table Entries
11. Change System Table Entries
12. Remove Audit Trail Entries
13. Change Hospital Information
14. Change System User Options
15. Both of these functions shown in red font should be protected to prevent users from making changes to Hospital Setup and the Advanced Options tab of Hospital Setup.
16. Change Item Information
17. Adjust on hand quantity
18. Both of these functions shown in red font should be protected to prevent users from adjusting the on hand quantity.
19. Change Medical History – prevents users from changing medical history that"s been posted to accounting.
20. Enter Medical History in History in Mode
21. Remove Inventory Used
22. Change Inventory Used
23. Change Treatment Information

24. Mark up treatments/items – if you don't protect this function, you can view the Price History for items at any time.
25. Print Time Card Report – this prevents users from accessing other employee time cards
26. Print audit trail report
27. Change Patient Estimate Amounts – be aware that this only protects changing estimates once they're selected for a patient. If you create a new patient estimate and change the price of a treatment/item before closing the estimate, the program will allow users to change the price.

Additional functions you may want to protect.

Protecting these functions may be desirable but you may find some of them restrictive since they require your password to allow users to perform some common functions.

1. Remove Medical History
2. Remove Unposted History
3. Change Account Transactions
4. Enter Services with Quantity Less than One – new function available in version 178. Be aware that this will also prevent users from entering returned items.

Please check the current security functions to see if there any others that you want to protect.

Addition and Modification Logs (available in 178):

In several areas of Avimark (Estimates, Glossary, Q & A List, System Tables, Diagnosis List, Problem List and Users and Security) you have the ability to track all additions and modifications. To view when and who modified an entry, right click the entry and click View>Entry History.

Monitor employee accounts:

If you suspect possible employee theft, you may want to use the Undelete feature in accounting and/or medical history periodically to see what's been deleted from those areas.

Monitor the Account Summary report:

This report contains a column named "Total Discount" which shows every client who received a discount on treatments/items.