



KEEP IT SECURED

There are two options for passwords within IntraVet, Program Passwords and Operator Id's with Passwords. Program passwords limit the options available to an employee while Operator Id's track who does what with the option to password protect each individual's ID. Read through the following information to determine what options are best for your clinic.

Operator ID's and Passwords

You may be using passwords to protect specific areas of the program but are you using them to protect your staff? Operator ID's (OpID) are designed to help you keep track of who is doing what and are initially set up by your trainer as free form entries. The problem is that staff often clicks through on the last OpID used rather than taking the time to change the OpID to reflect *their* information, which defeats the intended purpose. To solve this problem you can password protect each person's OpID. It only takes a few more keystrokes for them to enter and it holds everyone accountable for their own work. Be aware though, once passwords are set up they take effect immediately, so be sure to relate to your staff when you plan to implement them.

Each Operator ID must be unique. Ideally, you will want to use something that is recognizable like each person's initials, but you can also use a nickname, as long as it's 5 characters or less. Passwords can be 1 to 5 characters – numbers and letters only and are not case sensitive. You can choose the passwords for your staff or let them choose their own. Keep in mind that you will probably want to update their passwords at least once a year, just to be safe.

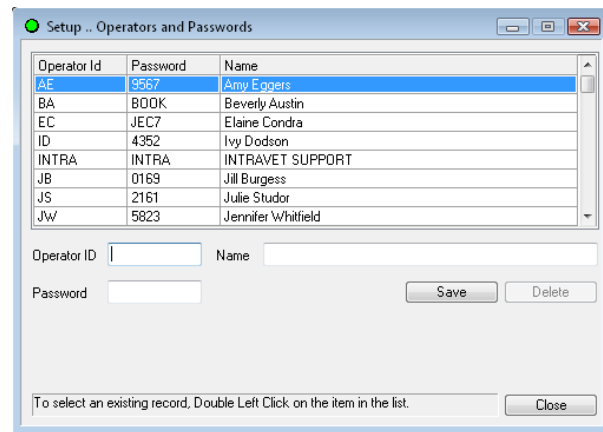
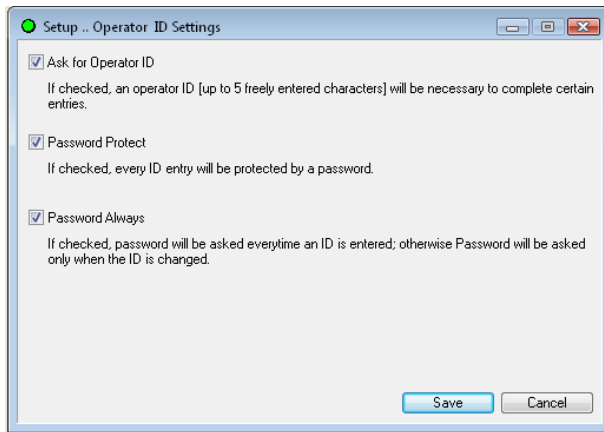
Remember once you set OpID's for passwords, it takes effect immediately, so be prepared to enter everything in at once.

SET OPID'S FOR PASSWORDS

1. Setup > Operator Id > Settings
2. Check "Password Protect"
3. Check "Password Always"
4. Click <Save>

SETTING UP PASSWORDS

1. Setup > Operator Id > Passwords
2. Enter OpID, password & associated name
3. Select <Save> to enter it up into the list
4. Continue adding names to the list, selecting <Close> when finished



Options:

Ask for Operator ID – This is the first and most basic form of tracking that IntraVet offers. Checking this option gives the prompt for a free form OpId. Once an OpId is entered, it will continue to pop up with the entered information until someone else changes it or they exit IntraVet. Although this allows a lot of leeway for what is entered as the OpId, it is convenient for someone who enters information in the same computer all day long. The flip side is that you can't be sure of *who* actually is entering the information since they can type in anything they want.

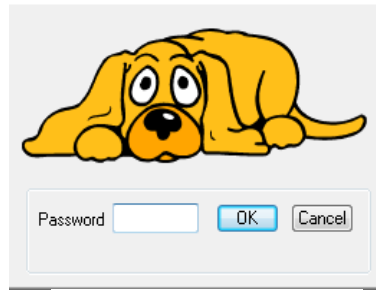
Password Protect – This is the second level of tracking and it goes one step above asking for an OpId by matching the OpId with a Password. Since it is actually matching what was entered to what is setup in the system, it is a stronger level of tracking. If you set up JTD as an OpId but someone types in THOR, the system is smart enough to know that THOR is not a valid ID and will not give access to the password field. This is a way to prevent someone without a OpId and Password (like clients) from doing specific tasks in IntraVet. Checking this option without *Password Always* means the password only has to be entered one time and the OpId can be used continuously after that on this computer without entering a password again. You should be aware that if an employee leaves that computer and someone uses it, unless that new person changes the OpID to theirs (with password), it will register as the previous entry. Again, convenient for the person who works at the same computer all day, has at least some level of protection but does not fully protect you or your employees completely.

Password Always – This is the highest level of tracking that IntraVet offers. If you check this option the Operator ID and Password needs to be entered every place the system requires an OpId. Since this is the highest level of tracking, we recommend clinics choose this option to hold their staff at full accountability.

Program Passwords

A separate section of IntraVet allows you to completely lock out certain areas of IntraVet by password protecting those areas with a Group Level Password. We consider this Group Level because they are not attached to the Operator ID and Passwords and do not identify any one person. Because there are only 4 levels, you may want several people to “share” one password and its limitations. The top level password is automatically set to access to everything, whether or not the options are checked because we assume that password will be for the owner and only the owner password has access to assigning passwords. We typically suggest a simple 0,1,2,3 as your passwords until you have everything setup.

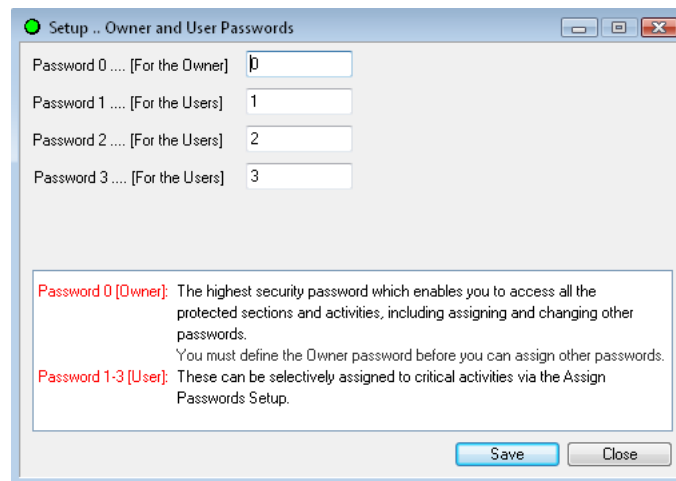
You can then go back and change them to something more appropriate. As with OpId passwords, we recommend that you change your passwords on a periodic basis to ensure the highest level of security.



Password Prompt

To Setup Program Passwords:

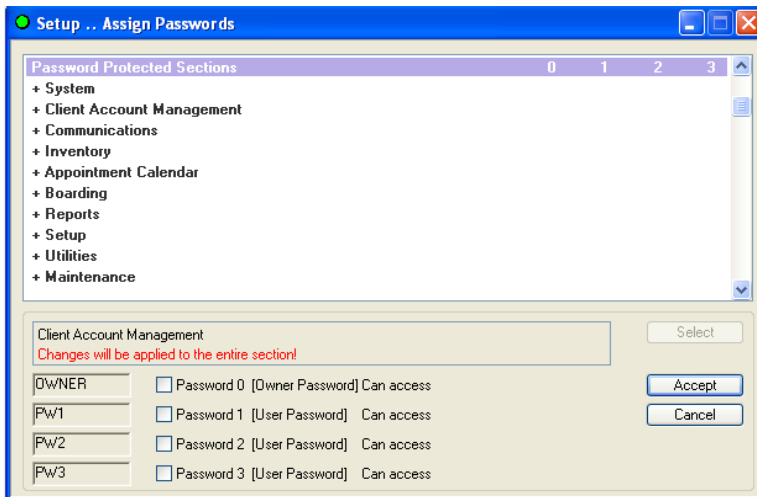
1. Select Setup > Password > Define Owner and User Passwords
2. Enter in Passwords for each level you will use
3. Click <Save>



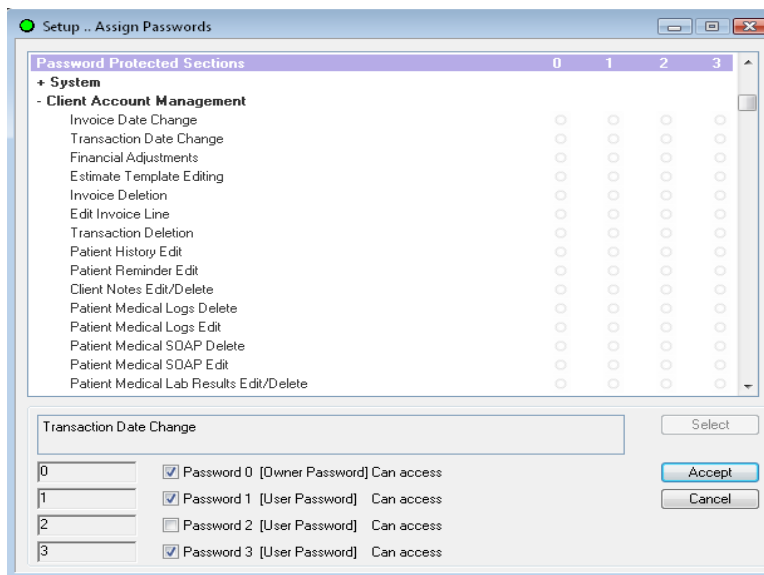
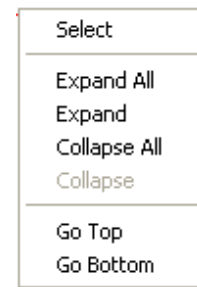
Passwords are assigned by category with each section expandable for more specific options. Whole categories can be selected and passworded all at once or they can be expanded and assigned individually. To view the options: Double click on the section or right click and select *Expand*. There may be subcategories in sections that can also be expanded. If a section is selected, the bottom half of the window allows you to assign or view who has access to the highlighted section.

To Select Password Options:

1. Setup > Password > Assign Passwords.
2. You'll be prompted for the "Top/Owner" password to access this area
3. Highlight in red the area you want to password and click <Select> button
4. You'll see the password levels listed at the bottom of the window. Check each level that will have access to the section highlighted OR uncheck those who do not need access
5. Click on <Accept> to accept your choices. Note that the Owner password automatically receives access even if it not selected.



Right Click for these Options



System Access

- **System Access** - If protected, users will require a password to *open* the IntraVet program.

Client Account Management

- **Invoice Date Change** – This will lock the system so that no one can back date an invoice. There are some good reasons to be able to enter backdated invoices but unless you specifically go back and run End-of-Day for that date you will never know one was entered. Backdating may have been used to enter previous information when you initially installed IntraVet but is normally not used on a day to day basis.
- **Transaction Date Change** – Goes along with Invoice Date Change, if someone back dates a transaction or payment it will not be detected unless the reports are run.
- **Financial Adjustments** – This is giving Credit and/or Debit adjustment on accounts. Access is recommended only for those who are authorized to make adjustments to a clients account.

- **Estimate Template Editing** – If you do not want general staff to make changes to existing estimate templates, protect this area.
- **Invoice Deletion** – Although there a plenty of legitimate reasons to delete an invoice, it's advised to protect this option as it should not be an everyday occurrence. A list of client invoices that were deleted can found on the Deletions list; however there is no record of the actual items that were deleted.
- **Edit Invoice Line** – Protecting this area limits the ability to change a doctor for a code item on an invoice in the transactions window after it has been saved permanently.
- **Transaction Deletion** – Transactions are payments, adjustments, refunds, etc. Like the invoice deletions, the need for deleting transactions should not be an everyday occurrence. The information is recorded to the deletions list but there is no record of what type of payment was deleted.
- **Edits/Deletes (History, Reminders, Client Notes, Logs, SOAP, Lab, Rx)** – In recent builds, IntraVet audits what happens in the medical history but there are no audits on Client notes. You will probably want to evaluate which options will be needed by your clinic. For instance, you may not want them to be able to Edit SOAPs or logs, but not delete them.
- **Save Parameters (History Options, Transaction Options)** - If you prefer that staff does not permanently make changes to the parameters set for this areas, then protect this section. Although it will not “hurt” anything if they do make changes, it can be frustrating if everyone is battling to set the parameters according to their preferences. You may want to keep the Print and Check In options available as they do not effect what you view in History.
- **Control Center** - Most of the options for Control Center are set once and probably not visited on a regular basis so most will have no need to access this area. No data will be harmed if this option is not protected.
- **Merchant Services** - Since Voids and Forced transactions are not the norm, you may want to protect both of these areas.

Communications

- **Data Export** – This export is related to any of the searches that can be done under the Communications menu (ie. Reminder, Recall Generator, etc.). The information exported depends on the area search and the parameters set.
- **Printing Cards/Letters/Labels & Search Listings** – This area is typically used by general staff for printing reminder cards. The Search Listing information varies based on the area and parameters searched and therefore you may want to protect the ability to print Search Listings.

Inventory –If you are planning on using IntraVet’s inventory module you want limited access to this area. We recommend that you only give those who work with inventory access to this area.

- **Inventory Update** – This is where you receive and return inventory. If someone does not receive inventory correctly they will skew the buy-sell ratio which is how the system knows you are selling 1 pill, ml, dose, etc instead of an entire bottle. Receives also affect the cost of inventory items and if entered incorrectly could distort some reports.

- **Inventory Adjustments** – This area is used to make physical adjustments to inventory. Adjustments are generally used to deplete or correct inventory counts.
- **Purchase Orders** – Purchase Orders work as a way to receive inventory and therefore behave similar to the Inventory Update
- **Warehouse Transfers** – If you have multiple warehouses, you should only give access to those who would be responsible for transferring inventory from one warehouse to another.
- **Inventory Barcodes** – Protecting this area limits who has the ability to add barcodes to inventory code items
- **In House Use** – The In House Use window allows you deplete items that you use In House. The items on the list are depleted from inventory stock at the moment this window is saved. You may not want to protect this area if you allow general staff to determine what is opened and used in house. If they must report to a manager before using something in house then you should protect this area.

Appointment Calendar/Boarding - Staff may easily need to make deletions to these areas as people cancel appointments or reservations. On newer builds, the appointment calendar will keep an audit of what is changed or deleted but the boarding center does not. If you have problems with staff members blocking out specific times on the calendar (such as the end of day appointments) then you probably want to protect the area related to Block/Reserve Slots.

Reports –This area can give information about your financials, productivity, doctor production, client list, and client and patient statistics. We suggest you password according to the information you want staff to have the ability to access. Keep in mind that some reports are run on a daily basis and used to balance the day's accounts.

- **Accounting Reports** – These reports show your sales and other financial figures in dollars and cents, tax information, credits and debits applied to client's balances, also discounts given, and unpaid balances due. Most clinics prefer this entire section be locked down, with the exception of the End-of-Day Transactions and End of Day Services Reports which the reception staff will want to run daily to balance their cash drawer.
- **Statements** – This is access to the actual function that runs your monthly billing statements for clients with unpaid balances. Depending on your setup, statements can create charges to client's accounts. We highly recommend this be accessed by the owner and office manager only, as running statements includes the ability to automatically apply billing fees and finance charges.
- **Productivity Reports** – These reports show all productivity figures. Different ones break them down by department, doctor, even returns. There are clinic averages and retention reports in this group as well. Most clinics prefer these reports be locked down as they are mainly accessed by the office manager or owner.
- **Compliance Reports** – Compliance options are rarely used but these reports would generally be accessed by an office manager and probably should be locked down.

- **Client Reports** – We recommend putting a high level password specifically to the Client List, as it literally prints your entire client list with address and phone number information for each. This report is located under Reports > Client reports > Client lists. The remaining reports have less sensitive information.
- **Patient Reports** – These reports are generally safe for all staff to access. In fact, many people like for their staff to review the Visit Service report to see what items might be outstanding in a patient’s history.
- **Inventory Reports** – Just like the inventory functions themselves, these reports should be locked to only those who need to know about inventory.

Setup – Code Setup – There are many options in this area for changing how your codes work and therefore are best to have locked down.

- **Department Codes** – Having the correct departments will help in viewing your reports, pulling information, performing price updates when needed, etc. Setting your departments up the way you want them can make all the difference in the world when it comes to reports.
- **Group Codes** – Within this area you can setup 1 code that groups other codes together. Other programs call these “Super Codes”. This is an area where if someone takes the time to create these codes, it will lessen the chance of missed charges because everything that needs to be charged is linked or “grouped” together.
- **Inventory Codes** – Typically speaking the clinic should not have this area open to everyone because it opens the door for any staff member to create inventory codes. The problem with this if you are using IntraVet Inventory Control module as soon as someone creates a new code it is going to skew the reports and your control.
- **Procedure Codes** – In much the same way Inventory Codes should be locked down so should Procedure Codes. Where this area does not have a “control” style to it, by locking this area down it forces the staff to use the codes that the owners created. Once codes are created and not departmentalized correctly, those codes will distort the reports.

Setup - This area is also important to how you have your system set up and should not be accessed by the general staff.

- **Program Setup** – Within this area you can tell the system on a global level how to act. There are multiple settings within this area and should only be changed by the owner or possibly the practice manager.
- **Hospital Setup** – This is the area that you change your address, phone number, etc. that prints on the invoice. Where this is not a security risk someone could possibly type something in the address that the owners do not want.
- **Appointment Calendar Setup** – Once the Appointment Calendar is set it should be locked down. Changing some settings will erase your entire appointment calendar. There are warning that this will happen but often they are overlooked. There is no restore for an erased calendar but a

log of the appointments is created. Recreating the calendar will require someone to enter each appointment back in one-by-one.

- **Forms Setup** – Within this area you can set your clinic and address info that prints on prescription labels, also create and set your health certificate default text. The printout settings are here as well, such as using letterhead paper instead of blank paper for certain printouts like statements or reminder letter, etc. You can also set it to use a hospital logo instead of blank paper with the typical clinic name and address info on it. Because of the need for accuracy and professionalism in these areas, we recommend only owners and office/practice managers have access to this area.
- **Operator ID and Password Setup** – If you are using OpID's and Passwords you should lock this area.
- **Boarding Setup** – Because this area is not accessed on a regular basis by the general staff, it should be protected.

Utilities – Utilities are not generally ran by the everyday staff and because of the nature of some of them are probably best locked down as a whole. Some of the utilities have an additional security measure where IntraVet locks this area out even from the owner/doctor. If you want to do something like a Mass Client Delete, IntraVet will need permission faxed to us in the form of a signed statement on your clinic's letterhead and must be signed by the owner/doctor. This is done mainly to protect your clinic.

- **Auditing** - Most of these refer to searching and displaying audit information and probably do not require a password.
- **Financial Corrections** – This area should be password protected as it may make adjustments to financial information. You should contact support prior to running this utility.
- **Incomplete Invoices** – This utility only shows a report of invoices that were not saved properly and probably does not need protection.
- **QuickBooks Export** – IntraVet offers a solution for the clinic to export their data and load it directly into QuickBooks. This utility creates a file containing financial information and locks a period. We recommend this option be locked down.
- **Client Quick Edit** – This utility offers a way to quickly change existing clients account settings on a global basis. That could be anything from changing their Credit Terms from COD to 30 or 60 days to making everyone tax exempt. The only people that should be making these changes should be the owners and office manager.
- **Change Client Account Number** – Ideally you should let IntraVet number accounts but there may be reason to change or a need to renumber an account. This is probably a utility best left to an office manager.
- **Client Delete** – You probably should not give general staff the ability to delete Clients without knowing why. Once a client is deleted, you cannot restore them.
- **Combine Date for 2 Clients** - Because there is no “undo” for this utility it is best to lock it down. Using this utility will allow you to combine the data (including transactions) of 2 client accounts.
- **Mass Client Delete** – Because this utility allows you to delete large amounts of clients at once, we require you contact IntraVet first to discuss what it will do.

- **Patient History Recall/Callback Corrections** - This utility is used to make global corrections to the reminders/callbacks after they have been adjusted and is not normally used by the general staff. We suggest locking this area down.
- **List of Manual Reminders** – This utility will generate a list of the manual reminders and does not usually require a password.
- **Apply Species Setup to Patient File** – This utility can make mass changes based on species and should be locked as it is rarely needed by any clinic.
- **Mass Patient Status Change** – Here the clinic has the ability to change the status of any patient with no activity since a certain date from active to inactive. It is not a security risk area but more of an inconvenience area if someone runs this utility because the best way to really get everyone back to active is on an individual basis.
- **Patient Delete** – Locking this area runs along the same reason for a Client Delete. Once a patient is deleted it cannot be restored but if selected at the time of deletions, information may have been archived. You should not allow just anyone the access to delete this information. If there are multiple records for the same pet there are other utilities that will combine these records. The clinic should use those utilities instead of deleting a patient.
- **Mass Patient Delete** – This utility should have the same security level as the Mass Client Delete since they are potentially the same security issue with deleting.
- **Code Name Change** –This utility gives you the option of changing a code or combining 2 codes and should be used judiciously. If you plan to re-use an existing code for something new, we suggest changing that code first so that you do not intermingle the new code information with the old code information. Once the code is changed, depending on how long ago you used that code last, you may want to delete it. You should be careful in deleting codes because once it is deleted, that code is no longer searchable within the system, although it will remain in medical history.
- **Doctor Code Change/Delete** – Because of the nature of this utility it should be locked down. If a doctor code is no longer needed, once you delete that code you can no longer search on it. If you just change the name on the Doctor code it will associate all the old codes used under the previous doctor to the new name. Ideally, you should first change the doctor code and then make a decision after a period of time if you want to delete the changed code. This will allow you to reuse doctor codes into the future.
- **Procedure/Inventory Codes Quick Edit** – The Procedure Quick Edit and the Inventory Quick Edit change is a way to globally change the setup of existing codes. This section should be controlled by the management of the clinic.
- **Procedure/Inventory Codes Mass Price Update** – This area should be locked as it deals with the selling price of your codes. Both utilities give management a way to increase prices. We recommend you use the Preview button before you actually run either utility to view the changes that will be made.
- **Combine Warehouse** – If you have multiple warehouses then you want have this area password protected in order to prevent staff from combining them together.

Maintenance

- **Data File Reorganization** – There is generally no damage done from leaving this option open. In fact, we often have general staff run this depending on the problem they call in about.
- **Data Fixes** – We suggest you protect this option because it can make changes to the data.
- **End-of-year Maintenance and Year Change** – Even though this utility is not available for use except for the beginning of the year, it should be protected. IntraVet sends out instructions at the end of the year on how to use this utility and our suggestions for reports that should be printed.
- **Data Purge** – This area allows you to delete patient history and should be password protected but also requires you call IntraVet first before using
- **System Configuration** – This area refers to the system path and printer setups. We use this area a great deal when supporting your general staff. If you have them call support and do not want to be bothered with entering a password when they do, then you probably do not want to lock this down.

A final word on Security and Tracking with IntraVet

The above recommendations are all based on our support experience. Your clinic should make final determinations about where to limit access and the level of tracking you want to establish. Often issues arise not because people are behaving in a malicious manner but because they are only curious or have what they believe is a good idea to fixing a problem. We always feel it's better to err on the side of safety.

If you have any questions, please call our office and discuss your situation with a support tech.

800-422-8875

Monday – Friday 8am to 9pm EST

Saturday 9am to 1pm EST