



Theft Deterrent Features



AVIMARK®

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Overview

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

Create 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**, double-click each employee name. Enter their account number in the Account field. Choose the appropriate “Access Type”. There are several access options 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.

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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.

- 1) 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**.
- 2) If you haven’t already done so, go to **Work With > Users and Security** and give everyone a password.
- 3) Go to **Work with > Hospital Setup > Advanced tab > Advanced Options**. Search for **Audit**. Set the Default Value for Start Auditing to 12:00a. Set the Default Value for Stop Auditing to 11:59p. Set the Default Value for Audit on Weekends to True.

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 set up.

Users and Security

There are many functions that you can protect to prevent users from performing them. 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 – 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.

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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.



Change Hospital Information and Change System User Options have to be secured if they plan to have security to Advanced Options of Hospital Setup.

15. Change Item Information.
16. Adjust on hand quantity.



Change Item Information and Adjust Quantity on Hand both have to be secured to protect users from changing the On Hand amount.

17. Change Medical History – prevents users from changing medical history that has been posted to accounting.
18. Enter Medical History in History in Mode.
19. Remove Inventory Used.
20. Change Inventory Used.
21. Change Treatment Information.
22. Mark up treatments/items – if you don't protect this function, you can view the Price History for items at any time.
23. Print Time Card Report – this prevents users from accessing other employee time cards.
24. Print Audit Trail report.
25. 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 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 – Be aware that this will also prevent users from entering returned items.

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

Addition and Modification Logs

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.