

## How to end the day in MSI PDX (suggested)

Everyone will probably end up with his or her own method and sequence of ending the day. The following is a suggested procedure to follow that is in our opinion the most logical and forgiving path to follow, i.e., do a backup before crossing bridges, etc. You gotta gotta gotta backup everyday, I don't care what system you are using. The day you don't take a few minutes to back up is potentially the day you'll really wish you had. You should verify that you are in balance everyday too. Otherwise, the rest of these things can be done at anytime as often or as infrequently as works best for you. However, you must do all of these steps before ending the month.

- 1) Finish your posting. You can list the uncollected charge slips now and take care of them now if you wish.
- 2) Run the Verify function to back sure everything is in balance. If you have totals that don't agree, see if you can fix it using the instructions on the report. If: a) you have a whole bunch of out of balance patients or claims or b) patients or claims are out of balance that no one has used or touched since the last verify or c) you can't get it to balance then contact MSI.
- 3) Note that you do not have run your check register every day or at the end of the day for that matter. If you want to run it three times a day or every other day at lunch that is fine. It does not have to be done at the same time as any other function. However, you should always balance and final the check register before ending your month. From end of day menu, run a trial check register. If you run it to the screen you can browse through it and not have to waste the paper to print it. When you run it to the screen, you can select search (Ctrl-Z) and search for \*\*\* (three asterisks). This will instantly find out of balance checks, even in a large register. You can Alt-Z to look again for more boo boos. Note all the mistakes and either return to posting to fix them or edit the register itself (see separate instructions for balancing the check register). Repeat this step until you get it right.
- 4) **Back up your data** to tape or zip diskettes or whatever media you are using. You can also do a hard disk backup now too if you desire.
- 5) Run a final run of the check register.
- 6) Run the daysheets. Note that it is not mandatory that you run daysheets every day. But you should definitely run the daysheets immediately prior to ending the month.