MaxGold Maintenance

There are several areas in MaxGold related to program maintenance. Maintenance is critical to using MaxGold effectively and efficiently. Like any other software program that utilizes large data that changes regularly, MaxGold requires that users pro-actively take care of their files. There are several categories related to maintenance, including;

- Re-Indexing data files

- Backing Up Your Data

- Archiving historical or older data

- Updating your software with current versions

- Updating critical files (billing codes, referring practitioner tables)

- Updating year to date (YTD) counters

Re-Index Function:

A lot of users do not understand what a re-index is and why it is critical. When software uses a database (say patient names) it acts like a super fast receptionist. The program gets electronic patient folders out of electronic files (data base files) and replaces them. The problem is that software programs do not place the files in the correct order after accessing them. Think of a deck of cards in order from the Ace to the King and suit order. Now mix up and shuffle the deck and that's essentially what programs do. Now if we shuffle a deck of cards, it becomes difficult to find a certain card (ie; the Jack of Spades) as it's now out of order. Software program can find shuffled files reasonably quick because computers are faster than we are. But even computers have limits and the worse files are shuffled the longer it takes to find them, even for a software program. This is solved by re-indexing the files, or rather putting them back in order (numeric or alphabetic).

Re-indexing should be done on a daily basis. It **must** also be done when no one else is using the software, which usually means after hours, end of day, beginning of the day, etc. Re-index will not run if another person is using the program. Re-index is recommended once a day and usually before doing an electronic billing submission.

Re-indexing can be done within the MaxGold program from the main menu under UTILITIES – MAINTENANCE – REINDEX DATABASE. Re-indexing can also be done external to MaxGold using our *max-index7.exe* utility. This external utility has the advantage that it can be set up to run automatically at preset days and times using MS-Windows Task Manager.

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Backing Up Your Data:

Backing up your data is critical. The rules for backing up data are;

- Back up your files daily

- Back up requires exclusive use (no one else can be using the MaxGold program when back up is done)

- Always have one back up that leaves your office and is secured

- It is advisable to do more than one type of backup

- If using the built in MaxGold backup utility, it is required that you also use another type of back up

The type of backup largely depends on the size of your data. There are various types;

- External hard drive (ie; thumb drive or jump drive)

- CD ROM backup

- DVD Backup

- Tape Back Up

- External Backup Device (ie; ZIP disks, REV disks, etc)

If the data being backed is not large (200 MB) then you may find a thumb drive or ZIP drive more than adequate. Larger data files require tape or REV drives (up to 30 GB or more). If using any device, always have more than one available. For example for the small jump drives, have two or three always available. If using ZIP disks or REV disks, use one for each day of the week.

Regardless of what you use to back up, check your back up frequently. Examine the files being backed up. **DO NOT** simply rely on a program to back up and **NEVER ASSUME** it works without fail.
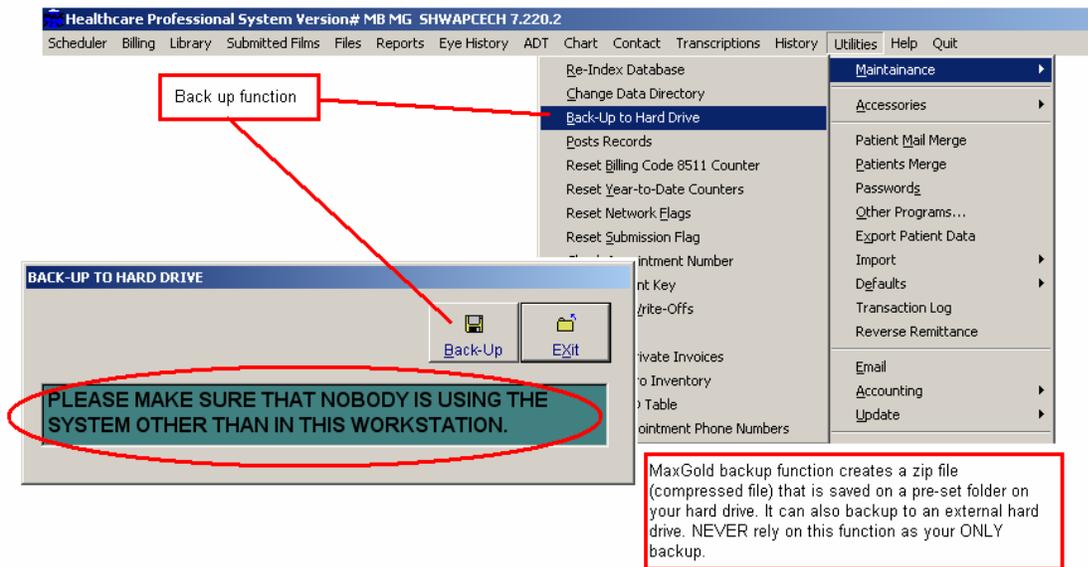

Archiving Data:

Archiving data is NOT deleting it. It simply moves data from current files into history. It is still accessible from various functions. The main reason for archiving data is so that your program will continue to work efficiently. For example, your scheduler books appointments throughout the year and beyond. After two to three years, depending on the size of your practice you may have over 20,000 appointment records sitting on your scheduler. By archiving past appointments you move these to the appointment history. You can still access a patient's past appointments, but now with your scheduler

cleaned up, it will function more quickly. There are several functions where you can archive data to history. These include;

- Appointments

- Health Care Billings

- Remittance Advices

- Private Billings

- Other Billings (WCB and MPIC)

The general rule is that you should archive the records at least once a year. That is, keep just 1 year of data in the current tables and send older data to history. If you just started using the program, your first archive may not happen for 13 months and then you are only archiving records older than 12 months to history files;

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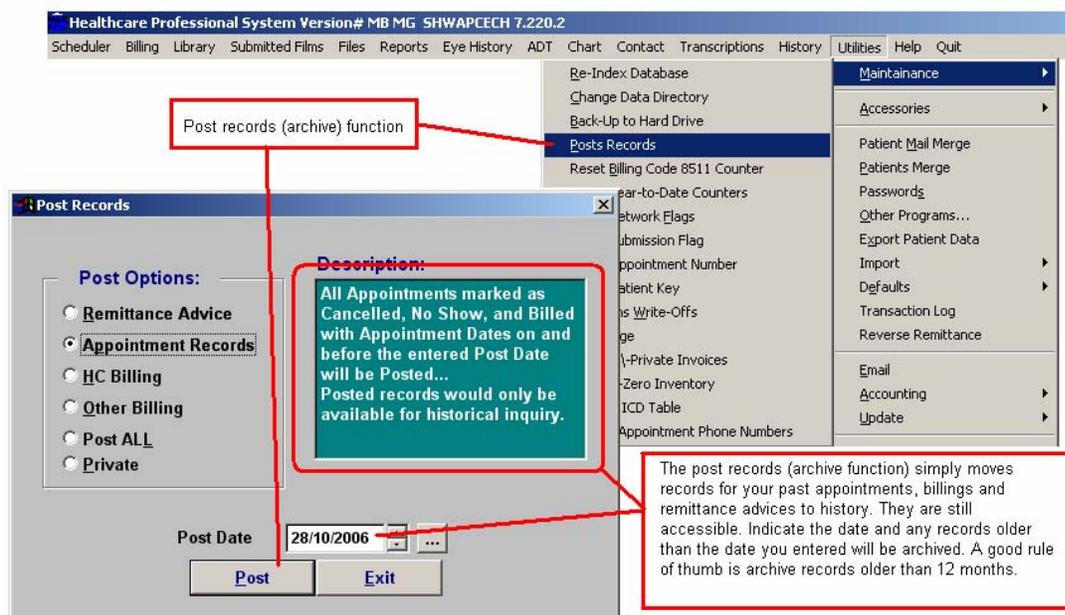
Updating MaxGold With The Latest Version:

MaxGold is constantly being improved with new functions added on a monthly basis. There are many reasons why you should update your software regularly. These include;

- Obtaining new features that enhance productivity and add new tools to manage your clinic with

- Getting changes to the critical healthcare billing functions.

- Obtaining improvements to existing functions

Updates are available on our web site at www.maxsystems.com in the download section. MaxGold clients should have a USER ID and PASSWORD, which are required to access program updates.

Updating Critical Files:

Just as important as getting program updates, you need to get regular updates of critical files related to healthcare billings. This includes;

- Billing Code Updates – Updates the fee's for your current billing codes and adds any new billing codes

- Referring Practitioner Numbers – Updates your referring practitioner table with new practitioners and indicates those no longer practicing in Manitoba

Manitoba Health makes changes throughout the year to both of these tables and twice a year puts out massive changes. MaxGold clients can obtain these updates via the internet. The update process has been automated for ease of use;

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Critical update requires exclusive use of the program and once completed, you will need to re-start the program. Once back in the program you should re-index your files.

Updating Year-To-Date (YTD) Counters:

There are several places in the program where the software keeps track of numbers or amounts. This includes;

- Arrivals, Cancels and No Shows – MaxGold tracks the number of visits (arrivals), cancellations and no-shows that each patient has had during the year. The program also keeps track of lifetime visits (arrivals), cancellations and no-shows. There is a reset switch that resets YTD numbers to zero.

- Insurance Anniversary Dates – Third party insurance companies offer a maximum allowed yearly coverage that resets each year on a certain date.

To update YTD counters for arrivals, cancels and no shows, simply go to the menu item UTILITIES – MAINTENANCE – RESET YEAR TO DATE COUNTERS;

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This function is done once a year and usually each calendar year (ie; December 31st)