

Menu Tree

Prepared for

myUnity Essentials Financial



Netsmart

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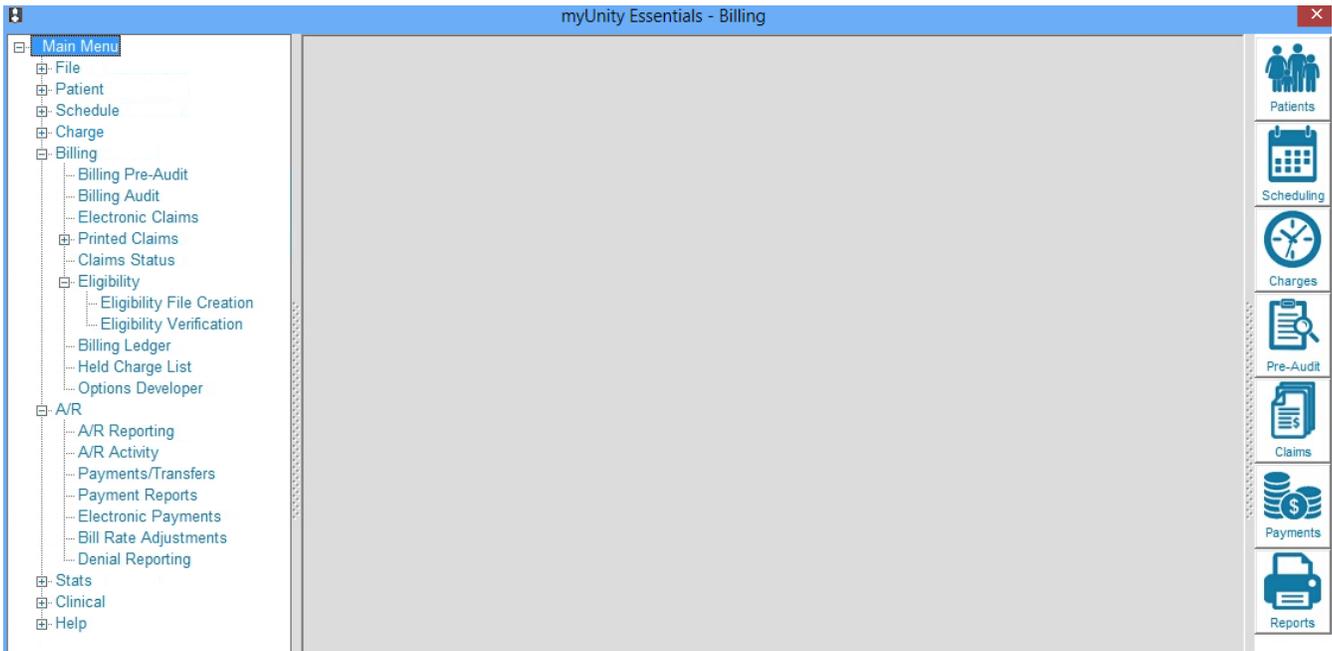
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Overview

Welcome to the new myUnity Essentials Financial layout! In order to provide easier access to the most frequently used menu options, myUnity Essentials Financial has a new look and feel as compared to the former layout you were used to with Homecare Accounting Solutions (HAS). This new feature also allows for added flexibility based on user preferences.



Menu Tree

The menu tree, located on the left, provides access to all menu options within myUnity Essentials Financial (formerly HAS). These menu options were previously located at the top of the window.

You can show or hide the sub-menus you utilize or don't utilize most often by clicking on the **Plus** sign to the left of the menu name to expand the menu or the **Minus** sign to collapse it.

Your preferences are automatically saved so you'll see the same menu tree each time you close and reopen the application.

Previously, when the menus were located at the top of the window, you had to click through multiple menus to get to the one you needed. You can now get to the same place via a single click on the menu tree instead.

Buttons

The shortcut buttons, previously located on the left side of the window, have been moved to the right, with additional buttons to select from. The buttons shown are the ones most frequently used by billers

and allow you to click through the billing process with ease. The default Buttons are listed below, but more can be activated under [File>Preferences](#).

Patient – opens Patient>Admit/Maintain

Charges – opens Charge>Enter/Maintain

Pre-Audit – opens Billing>Pre-Audit

Claims – opens Billing > Electronic Claims

Payments – opens AR>Payments/Transfers

Reports - opens File>Report Groups

Report List - opens a window with all Reports listed in one view

Preferences

Menu Tree

NOTE: A “MyUnity Essentials” option for turning off the new Menu Tree was available for a short period of time to allow for a transition period. With release 1.2.8.67, all users have been upgraded to the new layout.

Button Selection

The Button Selection pane allows each user to select which shortcut buttons they want to appear in the Buttons panel located on the right side of the window. Check or uncheck each box based on the menu options you most frequently use. Press **Save** and close the Preferences window to see your changes reflected.

Patients – opens the Patient>Admit/Maintain window

Scheduling – opens Schedule>Load/Maintain (only available for clients contracted for Scheduling)

Charges – opens the Charge>Enter/Maintain window

Pre-Billing Audit – opens the Billing>Pre-Audit window

Electronic Claims – opens the Billing > Electronic Claims window

Payment Entry – opens the AR>Payments/Transfers window

Report Groups - opens the File>Report Groups window

All Reports List - opens a window with all Reports listed in one view

Eligibility Check – opens the Billing>Eligibility>Real-Time Eligibility window (for clients who are contracted) or Billing>Eligibility>Eligibility File Creation

Hospice LOC – opens the Charge>Hospice LOC Report window

OASIS Export – opens the Clinical>OASIS/HIS Export window

Menu Button Bar

If you never want the button bar to show, it can be turned off by changing the setting in the upper left to **Do Not Show**. Press **Save** and close the Preferences window to see your changes reflected. The Button bar on the right side of your screen will not reappear unless you change this setting back to **Show on Right**.

Hiding the Menu Tree and Buttons

To temporarily hide the Menu Tree or Button panels from view, click the panel bar to show or hide each. These settings will be saved for the current session. When you close and reopen the application, they display by default.



User Security

For agencies utilizing User Security, menus displayed for the user are only those for which they've been granted access, regardless of the Preferences selected.