How to Use the DVM Document Access Service

dvm
MANAGEMENT

Congratulations on your decision to take advantage of your 4/7 document access service!

To take advantage of this service, all you need do is:

1. Visit our Web site at: http://www.dvmteam.com

2. In the lower left corner of the Welcome (Home) page, click the olive-green link button named “Client Files” to display the client file access page.

3. In the center of the client file access page, click the olive-green link button near the bottom center labeled “Client Sign On" to display the document access sign-on screen. At this step, please note the following:

   - Because your sign-on and file access pages will be displayed in a *separate window* (leaving this page open on your screen), *you will need to have **popups enabled**, i.e., **popup blocking will have to be turned off**, or the sign-on screen will not appear.*

   - The first time you do this, you may be prompted to install Citrix Web Client on your Web browser, which is needed for the file upload and download software to work. Follow the instructions given on the screen to do this. It should only need to be done once.

   A page with a slightly different background will appear in a new browser window, displaying places to enter your user name and password, which are as follows:

4. Enter your client user name and password in the boxes shown. Your user name and password information are as follows:

   User name:
   Password:

   A split screen window will appear with two dialog boxes:

   - A “Document Presentation” dialog box for downloading documents from us.

   - A “File Exchange Explorer” dialog box for uploading files to us.

   Instructions for doing each are given on the next page.

To download files from us:

1. On the Document Presentation dialog box, expand the folder tree pane as you would in the Windows Explorer, i.e., by clicking on the + sign to the left of the folder icon associated with your practice’s name. (There will usually be only one such folder, unless you have multiple practices.)

2. Expand subfolders in the same way, until you see documents, as well as folders, on the screen.

3. When you see a document that interests you, you can:

   - Open it in a separate window by left-clicking on its name.

     Note: You will need to have an application that can open the document installed on your system. Because most documents are in PDF file format, the application you need is Adobe Acrobat Reader. However, you might also find Microsoft Excel spreadsheets (.XLS extension) or Microsoft Word documents (.DOC extension).

   - Right-click on it to display a popup menu, from which you can do other file operations such as saving the file to disk, or opening it in the existing browser window.

To upload files to us:

1. On the File Exchange Explorer dialog box, click on the folder with the name of your practice. (There will usually be only one such folder, unless you have multiple practices.) The dialog box will expand to provide a “Browse” button, which you can click to display another dialog box from which you can browse your hard disks and/or network to locate files.

2. When you find the file you want, click the Open button, and the file will appear on the text box to the immediate left of the Browse button.

3. Click the Upload button to upload the file to your upload folder, where it will remain for up to 2 weeks, or when we retrieve it, whichever occurs first.