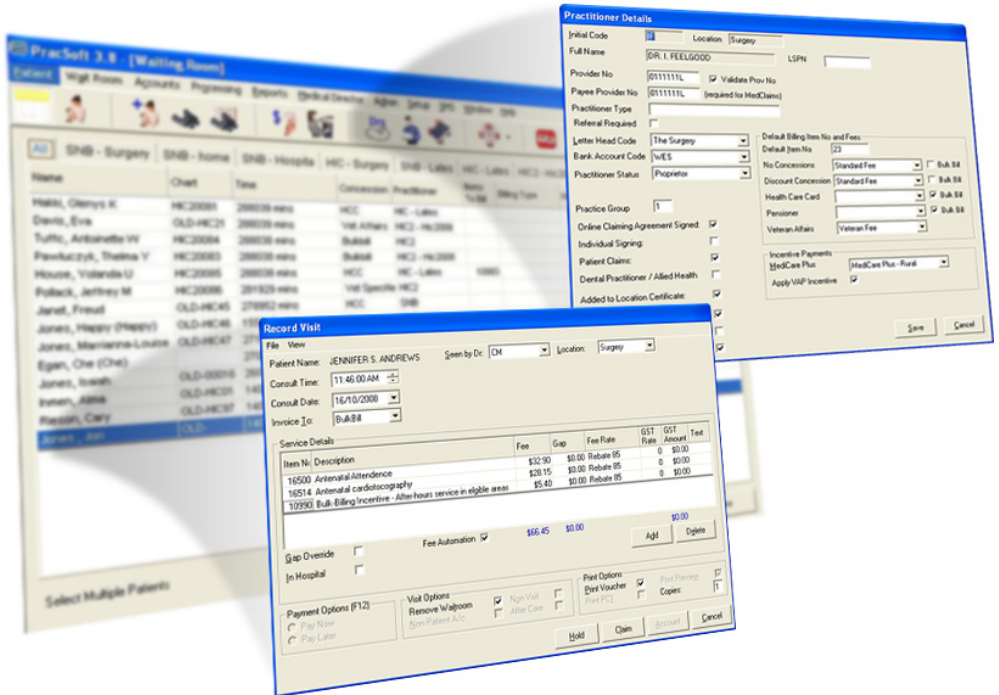


PRACSOFT QUICKSTART GUIDE



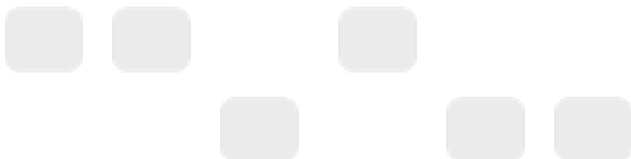
Thank you for purchasing PracSoft 3, Australia's fastest growing Practice Management software solution. PracSoft assists medical practices in managing their appointments, billing, reporting and Medicare Online Claiming efficiently.

PracSoft is developed and sold by Health Communication Network (HCN), Australia's market leader in the clinical and practice management software industry. More than 3,300 subscribers currently use PracSoft in their practices. Coupled with Medical Director, this suite offers demonstrable improvements in healthcare delivery.

This PracSoft 3 Quickstart Guide is intended to guide new subscribers through the required customised setup for your practice. It entails setting up of users, bank accounts, registering for Medicare Online claiming options, issuing accounts and much, much more.

Detailed information about PracSoft can be found in the Online Help, available by pressing F1 from anywhere in PracSoft. System specification for HCN software applications are available from the HCN Knowledge Base at www.hcn.com.au/support/kb.asp.

Should you require further assistance relating to your PracSoft software, please contact PracSoft Support on 1300 788 802 or log a call online at www.hcn.com.au/support/support.asp



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WHAT YOU NEED TO BEGIN

- Your Bank Account Details
- HCN PracSoft Licence Key
- Details of at least one installed Printer
- Your Practice Letterhead

BEFORE OPENING PRACSOFT FOR THE FIRST TIME

On first opening PracSoft you may see the following message:

"Your Windows date formatting settings are incompatible with PracSoft.

Expected format is 'dd/mm/yy' or 'dd/mm/yyyy'.

Please change your system's date settings before restarting PracSoft."

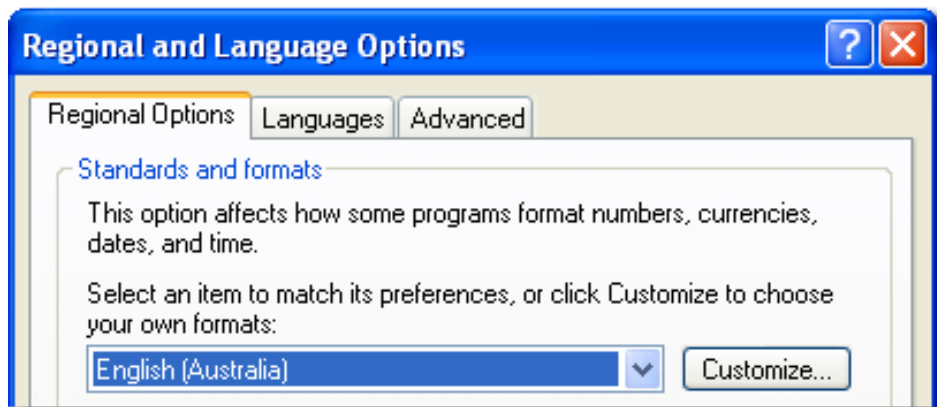
Changing your system date settings in the Windows Control Panel

You must ensure you are using the correct date format order for your Invoices and Medicare Claims to be processed correctly.

- Ensure the Regional Option is set to English (Australia).
- Ensure the short date format is dd/MM/yyyy

To set the correct Regional Options (for Windows XP):

1. Open the Windows Control Panel (usually accessible via the Windows Start Menu).
2. Locate and double-click **Regional and Language Options**.
3. From the Regional Options tab select **English (Australia)**.
4. Click the **Customise** button. The **Customise Regional Options** window appears.
5. Select the **Date** tab.
6. Ensure the **Short Date Format** is set to **dd/MM/yyyy**.
7. Click the **Apply** button, and then the **OK** button.
8. On the main Regional Options window also click the **Apply** and **OK** buttons.



Printers

It is a requirement of PracSoft that you have a printer installed prior to opening PracSoft for the first time. If you are unable to install a printer at this time please consult your Network Administrator for assistance. Alternatively the following instructions will enable you to install a *temporary* printer. Note that these instructions simply allow you to open and run PracSoft for the first time. Later, If you wish to print real data from PracSoft you should do so after installing your actual printer.

1. From the Windows Start Menu, locate and click **Printer and Faxes**.
2. Locate and click the **Add a Printer** link in the menu to the left of the Printers and Faxes window. The **Add Printer** wizard commences.
3. On the Add Printer Wizard 'Welcome' screen, click the **Next** button.
4. On the next window select the option to add a **Local** printer.
5. Ensure you *de-select* the checkbox that allows Windows to automatically detect your printer - you will install it manually, as explained in the following points.
6. Click the **Next** button. Select the **Use the Following Port** radio button. From the list of available printer ports, select **FILE: (Print to File)**.
7. Click the **Next** button to continue. For the purposes of setting up a temporary printer you may select any printer from the list provided.
8. Click the **Next** button to continue. You now have an opportunity to name your printer in order to identify it from others. You can also elect whether to use this printer as the default for all Windows print processing.
9. Click the **Next** button to continue. You may be prompted to indicate whether you will share this printer with other users on your network.
10. Click the **Next** button when you are ready to continue. You will be prompted to print a test page. It is not necessary that you print a test page.
11. Click the **Next** button to continue. Click the **Finish** button. Windows will now install your selected printer's driver.

OPENING PRACSOFT FOR THE FIRST TIME

Required Information

The following instructions must be completed before PracSoft can be used to record information.

Registering PracSoft

1. Locate and double-click the PracSoft icon on your Windows Desktop. PracSoft will open and you will be prompted to log on.

• Upon successful validation the Registration Key section is displayed in green, and the License Details section

Enter Logon Details

Login Details

Databases:

User:

Password:

Note : *** denotes a level 9 user.

OK

Cancel

2. Although you can use PracSoft in trial-mode by selecting the HCN Sample Database from the Databases drop-down list, in order to register your copy of PracSoft, you must select and log into the HCN Live Database.

3. You will be prompted to enter your registration details.

4. Click the **Yes** button to continue. The **License Details** window appears.

5. Add the Practice ID, Practice Name and Registration Key, exactly as supplied to you by HCN.

6. Click the **Validate** button to confirm.
- becomes populated with your Practice data. Click the **OK** Button to continue.

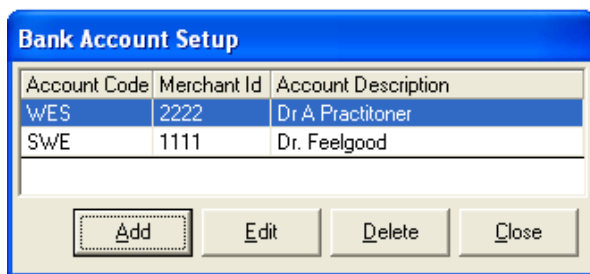
• At any time your registration details can be updated via: HCN Maintenance > Database Tasks > Common > License details.

7. PracSoft will prompt you to log in. As this is the first time you have run PracSoft there will not be any users in your database. Click the **OK** Button to continue. You will be able to add a new user shortly.

Add Bank Account Details

On opening PracSoft for the first time you will be prompted that there are no bank accounts set up. You must add at least one bank account to continue.

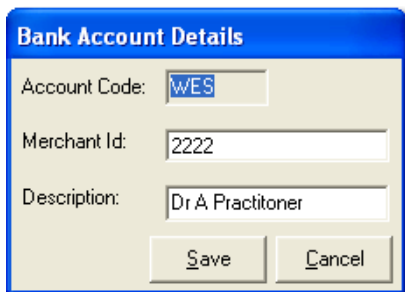
1. On the prompt click the **OK** button. The **Bank Account Setup** window appears.



The 'Bank Account Setup' window displays a table with three columns: Account Code, Merchant Id, and Account Description. It contains two entries: 'WES' with Merchant Id '2222' and Description 'Dr A Practitioner', and 'SWE' with Merchant Id '1111' and Description 'Dr. Feelgood'. Below the table are four buttons: Add, Edit, Delete, and Close.

Account Code	Merchant Id	Account Description
WES	2222	Dr A Practitioner
SWE	1111	Dr. Feelgood

2. Click the **Add** Button to add a bank account. The **Bank Account Details** window appears.



The 'Bank Account Details' window has three input fields: Account Code (containing 'WES'), Merchant Id (containing '2222'), and Description (containing 'Dr A Practitioner'). At the bottom are 'Save' and 'Cancel' buttons.

3. Insert the following details:

- Account Code: Max of 3 characters.
- Description: Printed at the top of your banking summary.
- Merchant ID: Supplied by TYRO, for use with EFTPOS Auto or Medicare Easyclaim (page19).

Additional Information:

- Each Doctor can have their own bank account, or they can choose to share accounts.
- If doctors have their own bank account, it is useful to use the same code as the doctor's user code for the bank account, e.g. the Doctor's initials - see 'Add a Top-Level User'.
- You may add as many bank accounts as you wish.
- Bank Account details can be reviewed later via Setup > Bank Accounts.

4. Click the **Save** button, and then the **Close** button. You will be prompted that no letterheads can be found. You must add at least one letterhead to continue. Click the **OK** Button now.

Create a Letterhead

On opening PracSoft for the first time you will be prompted to create a new Letterhead.

1. When prompted to add a letterhead, click the **OK** Button to continue. The **Letterhead Design** window appears.
2. To add a new letterhead, click the **Add New** button. When prompted, add a name for the new letterhead. Click the **OK** Button to confirm. The name of the letterhead now appears in the Name section as well as the Letterhead Items section.

Name: The Surgery Add New

Letterhead Items

Text to Print	Position from top of page (points)	Alignment	Font Name	Font Size	Font Attributes
The Surgery	20	Centre	Arial	18	Bold

Add Item Delete Item

Preview Save Close

3. The Letterhead Items section is the area in which you design your letterhead. In the example above we can see that:

- The first line of text to appear on our printed letterhead will be 'The Surgery'.
- This text will appear 20 points (a measurement of distance) from the top of the page.
- The text will be centre-aligned.
- The font used will be Arial with a size of 18 points and displayed in Bold.

4. To add a new line to your letterhead, click the **Add Item** button. A new line will appear in the Letterhead Items section, ready for you to add text (for the next line of your Letterhead). Add another line of text if desired.

5. Edit the Position, Alignment and Font style to suit. Click the **Save** button to confirm.

- To delete a line, click the line to select it, and then click the Delete Item button.
- You can preview your letterhead in Print-

Preview mode. First ensure you have saved the letterhead by clicking the Save Button, then click the Preview Button.

- Letterhead details can be reviewed and edited later via: Setup > Letterheads.

6. Click the **Close** button when you are happy with the letterhead design.

Add a Top-Level User

PracSoft will detect that you have no users in your databases, and prompt you to add one.

1. On the prompt, click the **OK** button. The **User List Window** will appear. The list will be empty the first time you open PracSoft.

2. On the User List window, click the **Add** button to add a new user. The **User Details** window appears.

3. Insert the following details:

- **User Code:** Enter the initials of the user or other relevant code.
- **User Type:** Select either User or Practitioner*.

*A User is typically the Practice Manager and/or reception staff. You can not bill to a User. User details can be edited via Admin > User List. A Practitioner is typically a Doctor or other Health Care Professional. You can only bill to a Practitioner. When adding a Practitioner you will be prompted to enter the Practitioner's details after saving a password. Practitioner details can be edited via Admin > Doctors.

- **User Name:** Enter the name as you wish it to appear in correspondence and on invoices.
- **Security Level:** Ensure Level-9 is selected. At least one active user with level-9 (full) access is required.

- **Summary Data View:** Select the appropriate option (only available to 'Practitioners').

All Doctors Billings: *All billing information per day is accessible via the Day sheets.*

Own Billings: *Own billing information per day is accessible via the Day sheets.*

None Allowed: *Billing information will not be accessible.*

4. Click the **Save** button. Enter a password, and then click the **Save** button again.

- If you added a 'User' you have finished creating the user login.
- If you are adding a 'Practitioner' you will be prompted to enter the Practitioner's details. Click the **Yes** button to continue.

Adding a Practitioner to PracSoft

5. Required information:

- **Location** e.g. 'Surgery'.
- **Provider number:** Required for Medicare Australia's Online Claiming (deselect if not applicable).
- **Payee Provider number:** Also required for MAO.
- **Practitioner Type** e.g. 'GP' or 'Specialist'.
- **Letter Head Code:** Doctors may have their own or share a practice letterhead (except for locums).
- **Bank Account Code:** Doctors may have their own bank account (except for Locums).
- **Practitioner Status:** Select the most appropriate description.

6. Optional information:

- **Default Billing Item Number and Fees.**
- **Default Item No:** This number will appear by default when billing to this Practitioner.

User Details

User Code:

Details

User Type:

User Name:

Security Level:

Summary Data View:

Mark Inactive ☐

- **No Concessions:** If a patient's details show they have 'No Concessions' then the fee rate selected in the drop menu will be billed by default.
- **Discount Concession, Health Care Card and Pensioner** types will also bill the chosen fee rate by default where this is specified in the patients details.
- **Veteran Affairs:** Select a Veteran Affairs rate (Usually 'Veteran fee' or 'Veteran LMO Fee'.
- **Bulk Bill check boxes:** Tick these boxes to prompt to Bulk Bill patients where the corresponding concession type is specified in the patient's file. For example you may wish to Bulk Bill all pensioners.
- **Incentive Payments.**
- **Medicare Plus:** Selecting 'MediCare Plus' will auto-add 10990 to invoices where applicable. Selecting 'MediCare Plus - Rural' will auto add 10991 to invoices where applicable.
- **Apply VAP Incentive:** The 10990 or 10991 will be auto-added to invoices depending on the Medicare Plus selection.
- **LSPN (Location Specific Practice Number):** Used for self-referred services via MAO.
- **Referral Required:** Mainly for Specialists to record referral details when billing.
- **Practice Group:** Statements sent out for overdue services from the 'Statements' section can be separated by a 'Practice Group'. You may want to separate employee

Practitioner Details	
Initial Code	GS Location
Full Name	Dr G Specialist LSPN
Provider No	<input type="checkbox"/> Validate Prov No
Payee Provider No	(required for MedClaims)
Practitioner Type	General Practitioner
Referral Required	<input type="checkbox"/>
Letter Head Code	The Surgery
Bank Account Code	SWE
Practitioner Status	Locum Tenens
Locum for	
Practice Group	0
Online Claiming Agreement Signed	<input checked="" type="checkbox"/>
Individual Signing	<input type="checkbox"/>
Patient Claims	<input type="checkbox"/>
Dental Practitioner / Allied Health	<input type="checkbox"/>
Send Scheduled SMS Reminders	<input checked="" type="checkbox"/>
Mark Inactive	<input type="checkbox"/>
Auto Capitalise	<input checked="" type="checkbox"/>
Default Billing Item No and Fees Default Item No 23 No Concessions <input type="checkbox"/> Bulk; Bill Discount Concession <input type="checkbox"/> Bulk; Bill Health Care Card <input type="checkbox"/> Bulk; Bill Pensioner <input type="checkbox"/> Bulk; Bill Veteran Affairs <input type="checkbox"/> Bulk; Bill	
Incentive Payments MediCare Plus MediCare Plus Apply VAP Incentive <input checked="" type="checkbox"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Doctor's statements from the Principle or Locum Doctors. Each Doctor with the same Practice Group number will appear on the same Statement run.

- **Send Scheduled SMS Reminders:** With SMS messaging enabled SMS reminders will be sent to this Doctor's patients via the Appointment Book.
- **Mark Inactive:** If you no longer need to bill to a Doctor you can mark them as Inactive.
- **Auto Capitalise:** Capitalise the first letter of every word.
- **Online Claiming Agreement Signed:** This checkbox is only available if you have elected to use Online Claiming via Setup > Global Settings. Upon ticking the 'Online Claiming Agreement Signed' checkbox, further options become available;
- **Individual Signing:** Allows you to select individual signing of Medicare Australia claims for this Practitioner using an ikey - a USB stick provided by Medicare Australia that you connect to the computer when preparing claims.
- **Patient Claims:** Used to indicate if this Doctor provides online private patient claiming.
- **Dental Practitioner / Allied Health:** Allow MAO functionality for Dental Practitioners or Allied Health Professionals.
- **Added to Location Certificate:** Verifies that the practitioner has been added to the Location Certificate when using Online Claiming.

Adding a Specialist to PracSoft

The process for adding a Specialist is much the same as adding a Practitioner, except that on the Practitioner Details window you must tick the 'Referral Required' checkbox to enable the recording of referral details when billing. You may also wish to indicate default items numbers 104 and 105 for the Specialist, which are added via the Practitioner Details window.


Information on adding referring doctors, and billing for specialists, is available within the PracSoft Help.

Logging On

1. When all applicable information is entered click the **Save** button. You will be returned to the Logon Details screen, where the list of users you have created appears.
2. Select HCN Live Data.
3. Select the Level-9 user you created earlier from the User list.
4. Enter your password and click the **OK** button. You will be prompted to set up SMS Reminder functionality. Whilst a valuable tool, it is not a requirement for running PracSoft for the first time. Cancel the SMS Reminder setup wizard. You may setup SMS Reminders later via SMS > Setup SMS Reminders.

Configure Printers

PracSoft will detect and use the default Windows printer unless otherwise specified. It is recommended you setup printers in PracSoft so that the correct format is used for each type of print job.

1. To access the Printer Setup window, from within PracSoft select Setup > Printers. There are 6 basic printer functions in PracSoft, as shown above. Changing these settings will not affect your default Windows printer.
2. To edit the printer settings for a particular function click the  button or **Setup** button for that function.

- **Accounts / Receipts:** Will be printed to the specified printer using the chosen settings (such as tray destination and paper size). Can be printed on A5 or A4 paper.
- **Medicare PC1:** Pre-printed stationery supplied by Medicare. If you have a multi-tray printer, specify the correct tray. To configure the printing of Medicare PC1 forms, consult the PracSoft Help.
- **Online Claiming Reports:** Must be printed

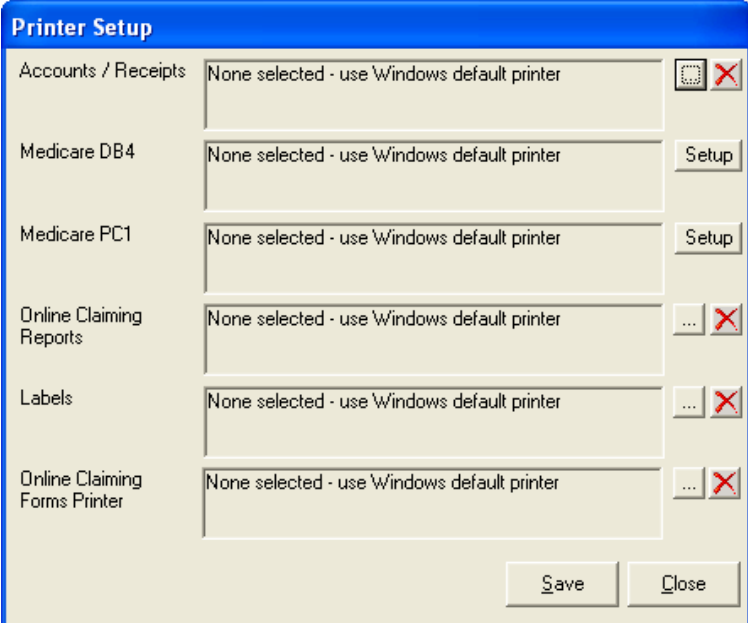
'Landscape' to fit all details.

- **Labels:** Select the appropriate printer, tray and settings as desired.
- **Online Claiming Forms Printer:** The form patients sign for Bulk Billing or DVA billing. Can be printed on A5 or A4 plain paper. Select the appropriate printer, tray and settings as desired.









Enter Practice Address Details

Before recording a visit for a patient you must enter the Practice's address details.

1. Select Setup > Practice Details. The **Practice Details** window appears.
2. Enter a minimum of Practice Address, City/ Suburb, Postcode and State. The option to *'Use practice suburb and postcode as default for new patients'* will automatically populate the suburb and postcode of all new patients with that of the Surgery.



The 'Printer Setup' dialog box contains the following fields and controls:

Function	Printer Selection	Controls
Accounts / Receipts	None selected - use Windows default printer	 
Medicare DB4	None selected - use Windows default printer	Setup
Medicare PC1	None selected - use Windows default printer	Setup
Online Claiming Reports	None selected - use Windows default printer	 
Labels	None selected - use Windows default printer	 
Online Claiming Forms Printer	None selected - use Windows default printer	 

At the bottom of the dialog are **Save** and **Close** buttons.

Downloading & Importing (MBS) Fees

MBS Fee item numbers are updated periodically. The following instructions explain how to update PracSoft to accommodate these changes. Note that the importation of fees into PracSoft cannot be performed through a Remote Desktop or Terminal Session.

Instructions for PracSoft 3.1.2 (or later)

Note: It is recommended that this update is performed on the server computer.

- This update must only be used for PracSoft 3.1.2 or later.
- This update must not be used for PracSoft 3.1.57 or lower.

1. Download the MBS Fee Update file from <http://www.hcn.com.au/products/pracsoft/downloads.asp> to your computer. Note the filename, e.g. Ps3MbsFeeUpdate1108.exe

2. Locate and run the MBS Fee Update file to begin extraction. If prompted with a Security Warning, click the **Run** button then click **OK**.

3. Click the **Unzip** button to extract the MBS Fee Update file to the default location (C:\Program Files\Health Communication Network\Common\HCNInstMngr). You will be prompted upon successful extraction.

4. Run PracSoft and select Setup > Fee Columns.

5. Click the **Import Fees** button.

6. **Browse** to the current .MBS file and select **Open**. Example: Nov2008.MBS.

7. Click the **Next** button. Follow the prompts to update the fee table.

8. Fee columns generated by the surgery that include formulas will need to be recalculated by selecting Setup > Fee Columns, highlighting the fee column and clicking the **Recalculate** button.

ADDING NEW PATIENTS

If you use a Medical Director 3 database or will be upgrading from MD2 to MD3, patients will be available in PracSoft via the MD3 upgraded database. Also, you can add new patients;

1. Select Patient > New Patient.
2. Enter the patient's information.
3. Either click the **Save** button to save and close the window, or click the **Wait Room** button to save this new record, immediately adding the patient to the Waiting Room. The Referral Details window may appear. Complete any referral information for the patient. This prompt can be disabled via Setup > Global Settings > Patient tab.

Add New Patient

Title Firstname Surname Known as Date of Birth Sex

Patient type: Active Regular Practitioner

Chart type: Permanent Chart No. Allocate Chart No.

ATSI Non-indigenous

Medicare No Expiry date

Payment Details Address/Phone Personal Details Notes

Payer Details: Payer: Self Other Payer Name

Other Payment Information: Concessions None DVA File No Entitlement No HCC To Date Insurance None

Auto Capitalise ☒ Wait Room Save Print Cancel

ADDING INSTITUTIONAL PAYERS

1. Select Admin > Institutional Payers.
2. Click the **Add** button. The **Institutional Payer Details** window appears.
3. Enter details as necessary, including a code to identify this Institution from others.
4. In the 'Default Fee' column select the fee rate for this Institution. If it is a new fee rate, you must set up this fee rate.

Institutional Payer Details

Code Name Contact

Phone Fax Email Address Default Fee Column

Address Suburb State Postcode

Postal Address Postal Suburb State Postcode

Notes

Marked Inactive ☐
Auto Capitalise ☒

Save Cancel

APPOINTMENTS

Adding a New Appointment Book

A default Appointment Book is provided with PracSoft. Creating further Books should be considered carefully, as once created, they *cannot be deleted*.

To create or add an Appointment Book:

1. Select Wait Room > Appointments to open the PracSoft Appointments module.
2. Select Setup > Manage Appointment Books.
3. Click the Add button. Enter a Description (name) for the new Book and click OK. You will be prompted to confirm this action.

Adding an Appointment

The following information describes how to schedule a basic appointment. Further information about how to create appointments for non-patients, multiple patients, recurring appointments and more is available from the PracSoft Help.

1. Select Wait Room > Appointments to open the PracSoft Appointments module.
2. Select which Appointment Book you wish to display via the associated drop-down list at the top-right of the window.
3. Select the Practitioner you wish to schedule an appointment for via the associated drop-down list at the top of the window.
4. Click a time slot for the appointment.
5. Type the patient's surname, comma, first name (or part of), or first name and surname without commas.
6. Press ENTER. If there are multiple matching patients a list appears to select from. You may be prompted if the patient has an outstanding account.

FEES

PracSoft supports standard fee columns (Medicare Benefits Schedule and Medicare Rebate) and up to 14 user-defined fee columns to cater for fees on a per-Practitioner and per-Institution basis.

PracSoft comes supplied with a Standard Fee list of over 100 commonly used items, which can include item numbers that use alpha characters (e.g. 'Hep B') for use with items that are not in the Medicare Benefits Schedule.

To setup your PracSoft fees select Admin > Fees to reveal the **Fee Listing** window. To find a specific item number, click the **Find** button. Enter an item number and click the **OK** button.

To modify the layout of the screen, hide columns and rearrange the order in which the columns are shown select View > Choose Columns from this window. The 'Choose Columns' window appears. Select which columns to display by checking the associated check boxes.

Managing Fees

To setup or edit customised fees:

1. Select Setup > Fee Columns. The **Fee Column Configuration** window appears.
2. Select an available column from the list and click the **Edit Column** button.
3. Enter a Fee Name and Billing Code for the Fee. Typically the Billing Code is an abbreviation of the Name.
4. (Optional) Specify a Formula and Rounding value.
 - A column name in a formula must

be typed exactly as it appears in the reference list and must be enclosed in square brackets (for example for a column value you wish to be \$5 above the Schedule Fee, type [SchedFee]+ 5). The mathematical operators +, -, * and / are supported.

- Select for the Rounding options as appropriate from the drop-down lists supplied (for example 'Rounding Type' and 'Rounding Value').
5. Enter the Display Order. This field affects the order in which this fee column is displayed in PracSoft.
 6. Click the **Save** button to save these details.

Notes about Fees:

Formula: It is possible to achieve quite sophisticated results and all standard SQL functions are supported. If you require a complex formula, help may be found on PracSoft's User Forum. Many advanced users will provide you with assistance, as they may have already encountered the issues you are trying to solve. The PracSoft user forum is accessible via the HCN web site.

Recalculation: When a row representing a User-Defined fee column is selected in the Fee Column Configuration window, the Recalculate button is enabled. If you have entered a formula, or the standard fee columns have changed because of an update, click this button to recalculate each fee column. If you have entered an inappropriate formula, clicking Recalculate

displays an error message. Click OK to the error message, and rectify the formula. No fee amounts are altered if a formula is incorrect.

Obsolete Fee Columns: If you have a user-defined fee column that is no longer used, change the name of the fee column back to 'Unused' or another name that is not referenced by the system.

Applying Fees to Doctors

1. To nominate the fee columns that apply to the various patient concession levels for each doctor, select Admin > Doctors. The **Registered Practitioners** window appears.
2. Select a Practitioner and click the **Edit** button. The **Practitioner Details** window appears. To the right of this window are the options/values relating to Billing.
3. Select the appropriate values from the drop-down lists provided.
4. Click **OK** to save the information.

Applying Fees To Institutions

For institutional payers you may nominate which default fee columns that are charged.

1. Select Admin > Institutional Payers.
2. Select a payer and click the **Edit** button.
3. Select the appropriate fee for the institution via the **Default Fee Column** drop-down list.
4. Click the **Save** button to confirm.

PATIENTS AND THE WAITING ROOM

To add a patient to the Waiting Room list:

1. Either press F3, or select Wait Room > Add

to Waiting Room.

2. Enter the patient's Surname, Medicare Number or Chart Number in the text box at the top of this window. As you type, a list of patients appears in the lower section of this window, generated dynamically.
 - If you are unsure of the spelling for a particular patient's name, you are able to select from the list after typing in the first few letters (or digits in the case of a chart number).
 - If you are searching for a patient based on Medicare Number, you must enter the full number before the list is populated.
3. Double-click the patient record to add them to the Waiting Room list.

ISSUING A PRIVATE ACCOUNT

The following is an overview of recording a visit and issuing a Private Account (where the patient takes the invoice with them). Detailed information about recording visits for these and other account types is available in the PracSoft Help, by pressing F1 from within PracSoft.

The following steps start with a patient in the Waiting Room list, however there are other ways in which to begin recording a visit.

1. In the Waiting Room select the patient you wish to record a visit for, and then click the **Visit** button at the bottom of the window. The Record Visit window appears.
2. Select 'Patient' from the **Invoice To** drop-down list. The patient's Payer details appear. If the Practitioner entered the Item Numbers during the consultation, these

are automatically listed the **Item No** and **Description** columns along with the fee and other related information. If you have set up PracSoft to default to a particular item number for each Practitioner, this automatically appears, depending upon the Practitioner.

3. Add, remove, or modify the services listed as appropriate. For detailed information refer to **Modifying Services** in the PracSoft Help.
4. Select a payment option (either Pay Now or Pay Later).
5. Process the account as follows;
 - To put the account on hold, click the Hold button. This option is available only if you elected to Pay Later, in Step 4.
 - To send the patient an account notification at a later date, click the **Account** button. If you have the **Print Preview** checkbox selected, a print preview is shown before printing. This option is available only if you elected to Pay Later, in Step 4.

To issue a receipt for the account click the Receipt button. This option is available only if you elected to Pay Now, in Step 4.

ISSUING A BULK BILL ACCOUNT

This procedure applies to situations where you need to print a Medicare voucher for Bulk Bill patients. At the 'Record Visit' window, proceed as follows:

1. In the Waiting Room select the patient you wish to record a visit for, and click the **Visit** button.
2. Select 'Bulk Bill' or 'Vet Affairs' from the '**Invoice To**' drop-down list.
3. Add/Remove items via the add/delete buttons. The 'Print Voucher' check box should be selected.
4. Click the Voucher button (or Claim button for Medicare Easyclaim). A voucher is printed, or your claim is processed immediately (via Medicare Easyclaim).

If your surgery is setup to transmit claims to Medicare Australia Online Claiming, the voucher details are now waiting to be batched in the next claim (refer to **Batching Bulk Claims** in the PracSoft Help).

Default Billing Item No and Fees		
Default Item No	23	
No Concessions	Schedule Fee	<input type="checkbox"/> Bulk Bill
Discount Concession	Schedule Fee	<input type="checkbox"/> Bulk Bill
Health Care Card	Pensioner Fee	<input type="checkbox"/> Bulk Bill
Pensioner	Pensioner Fee	<input type="checkbox"/> Bulk Bill
Veteran Affairs	Veteran Fee	<input type="checkbox"/> Bulk Bill

Incentive Payments	
MediCare Plus	MediCare Plus
Apply VAP Incentive	<input type="checkbox"/>

Save Cancel

WHAT NEXT?

Setup SMS Reminders

SMS Reminders allows users to send SMS messages to mobile phones from within PracSoft. Upon opening PracSoft for the first time, any top-level user will be prompted to setup and register for SMS Reminders. PracSoft uses a third-party SMS service to send SMS messages.

Medicare Easyclaim

Medicare Easyclaim is a system that allows patients to claim Medicare rebates whilst they are at your surgery. You can process Patient Claiming and Bulk Bill via Medicare Easyclaim using HCN's Integrated EFTPOS facility, known as EFTPOS Auto. Detailed information on Medicare Easyclaim can be found within the PracSoft Help and via the Medicare Australia Easyclaim web site at www.medicareaustralia.gov.au/public/claims/easyclaim.jsp

Please note to take advantage of Medicare Easyclaim functionality you will require an EFTPOS terminal from TYRO. Please contact PracSoft Sales on 1300 300 161 (opt 1).

Integrated EFTPOS

1. Select Setup > EFTPOS/Medicare Easyclaim > Terminal Configuration.
2. Click the Add Connection button.
3. Enter your Merchant ID, Terminal ID and Terminal Name. Click the Connect button to establish a connection with your terminal.
4. Select Setup > Bank Accounts.
5. Double-click the practitioner who will be using EFTPOS and enter their Merchant ID.

Detailed information about Integrated EFTPOS is available from the PracSoft Help.

KEYBOARD SHORTCUTS

Types of Appointment

Key	Action
Ctrl + P	Procedures
Ctrl + V	Vaccination
Ctrl + B	Obstetrics
Ctrl + T	Blood Test
Ctrl + U	Acupuncture
Ctrl + E	Emergency
Ctrl + D	Dressing
Ctrl + S	Script
Ctrl + F	Blood Test Fasting
Ctrl + O	Ordinary Appointment
Ctrl + L	Blood Pressure
Ctrl + H	Home Visit
Ctrl + M	Pap Smear
Ctrl + X	Custom Type "X"
Ctrl + Y	Custom Type "Y"
Ctrl + Z	Custom Type "Z"

Appointment Book

Key	Action
F11	Next Day
F12	Next Week
F8	Next 4 Weeks
F9	Today's Date
F2	Find an Appointment
Ctrl + W	Add Patient to Waiting Room
Ctrl + I	Open Patient in MD
Ctrl + Insert	Cut
Shift + Del	Delete Appointment Column
Shift + Insert	Paste
Ctrl + G	Gone
Ctrl + A	Add a 'Fit In' Appointment

Record a Visit

Key	Action
F12	Display Receipt Information
Ctrl + S	Search For Item Number
Ctrl + N	Add Visit For Same Patient

Waiting Room

Key	Action
F2	Find a Patient
F3	Add Patient to Waiting Room
F5	Record a Visit
F7	View Patient Details

General

Key	Action
F1	Help
F6	Add New Patient
Ctrl + L	Log Off
Ctrl + R	Refresh



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