



MedicalDirector
PRACSOFT

MedicalDirector PracSoft User Guide

This User Guide is intended to assist staff through all aspects of using MedicalDirector PracSoft in your practice's daily operations. It comprises topics including managing user accounts, recording practitioner details, entering new patients, managing patient bookings, recording a visit, processing the banking accounts, registering for Medicare Online claiming options, issuing accounts, generating reports and much, much more.

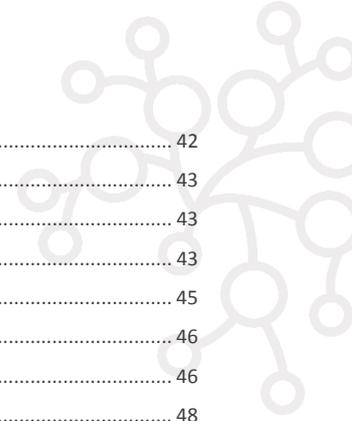
This guide is designed to be used in conjunction with the Online Help (available by pressing F1) and the MedicalDirector Knowledge Base at www.medicaldirector.com/kb.



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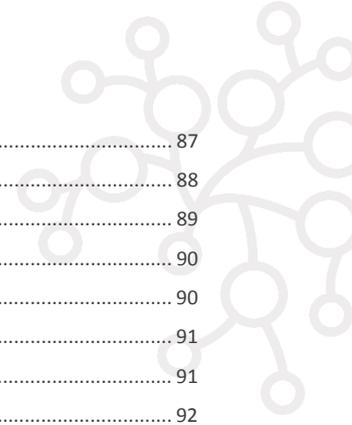
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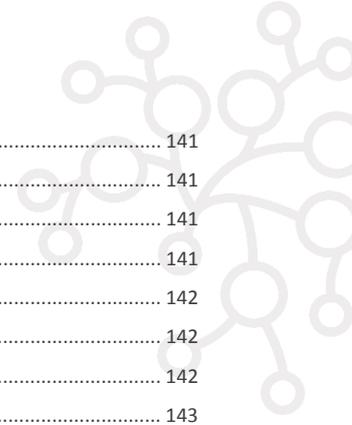
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Introduction

Using this User Guide

Reference how to perform a certain task within MedicalDirector PracSoft by following the specific sequence of steps, or review a whole topic. In addition to the steps, record your own practice procedures where applicable.

Note: When following a task, refer to this greyed box for additional information to help you make informed decisions when using MedicalDirector PracSoft. Key highlighted topics include tips, notes and important information to support the step sequences.

Installation

Once you have received the MedicalDirector Clinical and PracSoft DVD, the first task is to install the nominated programs on your practice server. After installation, perform the initial configuration of the server then setup the MedicalDirector PracSoft program. To complete the task, install the software on each workstation, including the front desk, practice manager and practitioner offices as required. For further detailed directions on how to install MedicalDirector software on your server or computer, refer to the installation guides available on the DVD Installation Wizard.

Periodically, MedicalDirector releases updates with new, richer functionality. To access the latest update, visit the MedicalDirector download page.

For more information about the recommended system requirements for running MedicalDirector PracSoft, refer to the article 'Recommended System Requirements for MedicalDirector Applications' available from the Knowledge Base at www.medicaldirector.com/kb

Getting Started

After installing MedicalDirector PracSoft, you will be required to tailor the product; to assist you in this task refer to the Getting Started guide. This document is available from the MedicalDirector website at www.medicaldirector.com

Topics include:

- Launching MedicalDirector PracSoft for the first time
- MedicalDirector PracSoft licence key
- Setup a bank account
- Practice letterhead
- Setup an initial 'Top-Level' User
- Setup printers



User Accounts

Understanding Account Types

All users of MedicalDirector PracSoft fall into one of two basic categories; ‘User’ accounts and ‘Practitioner’ accounts.

- A **User** account refers to any user of MedicalDirector PracSoft *who does **not** intend to bill patients for services*. This is usually the practice’s administrative staff.
- A **Practitioner** account refers to any user of MedicalDirector PracSoft *who intends to bill patients for services performed on behalf of the practice*.

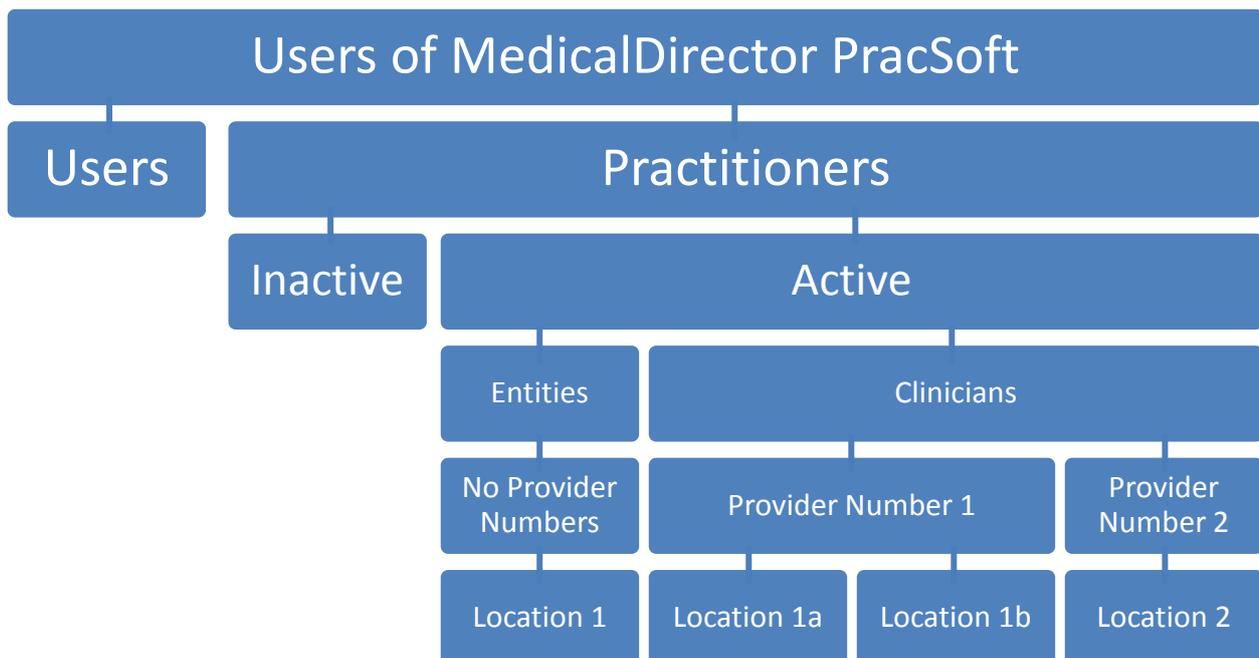
Note: To assist with understanding user account types in MedicalDirector PracSoft, refer to the diagram below.

Practitioner accounts are then divided into two groups; ‘Inactive’ and ‘Active’:

- An **Inactive** practitioner is a clinician who does not intend to bill patients for services within MedicalDirector PracSoft. For example, you may have a clinician who is registered in MedicalDirector Clinical, but who only wants to have an Appointment Book within MedicalDirector PracSoft.
- **Active** practitioners on the other hand *do* bill patients for services. In order to bill for services, an active practitioner must supply at least a location description and Provider Number(s), which are recorded in MedicalDirector PracSoft.

Active practitioners are further sub-divided into ‘clinicians’ and ‘entities’;

- A **Clinician** *must* have recorded a unique provider number that reflects the location of the service. For clinicians who work across multiple addresses it is a Medicare requirement that they have a separate provider numbers for each location at which they practice. To correctly bill, each location needs to be recorded in MedicalDirector PracSoft.
- An **Entity** is generally a non-human, administrative account with which you bill patients for services. For example, your practice could bill a patient who purchases an over-the-counter item. If you intend to bill patients for sundries in this manner, you can create an ‘Active Practitioner’ account for your practice. An entity does not need to record a provider number as it cannot conduct online claiming, but it *does* need to record a location.





Locations, Provider Numbers, and Minor IDs

In MedicalDirector PracSoft there are two definitions for 'location';

- The first is the address of the practice, as registered with Medicare.
- The second location field is recorded in the Practitioner's profile, reflecting the address at which they are registered to practice. Practitioners registered to consult at multiple practices are issued a different Provider Number per physical location by Medicare. Within MedicalDirector PracSoft, the location name is designed to assist staff in identifying where the consultation occurred, ensuring the correct Provider Number is sent to Medicare.

A Minor ID is required by Medicare (assigned to your practice by MedicalDirector) to differentiate it from other practices. Single or multiple site practices sharing the same patient database only require the one Minor ID. Larger practices with separate databases require a separate Minor ID for each installation.

Account Examples

Example One

Carolyn the Practice Manager requires access to MedicalDirector PracSoft to monitor the performance of the practice. As Carolyn is not able to directly bill patients for services she has performed, her account type will be that of 'User'.

Example Two

Jenny the Receptionist requires access to MedicalDirector PracSoft to add new patients, record appointments, and record patient consultations. As Jenny only needs to perform these daily tasks within the practice, she is assigned an account type will be that of 'User', and assigned a security level that reflects the tasks assigned to her.

Example Three

Doctor Meg Leonard intends to bill for services she has performed. Therefore her account type will be that of 'Practitioner'.

She also works from a single location, and has been registered with Medicare for the one Provider Number. Within MedicalDirector PracSoft, she requires only the one 'active practitioner' profile.

Example Four

Doctor Alfonso Terri-Anne works across two physical sites, located in different suburbs. Even though the practice has two addresses, they share the same patient database.

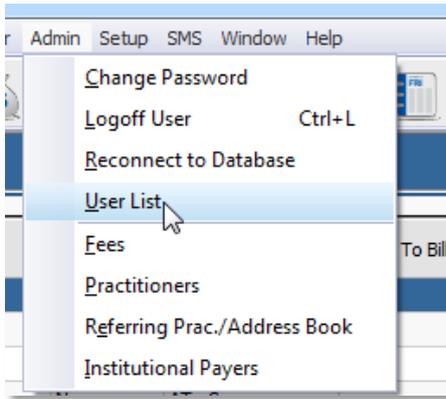
Because Dr Terri-Anne has registered to work at two different addresses, Medicare will assign him two different Provider Numbers. Within MedicalDirector PracSoft, he will require two 'Registered Practitioner' profiles be recorded; the Location field for each record identifies the practice site it relates to.

Adding User Accounts

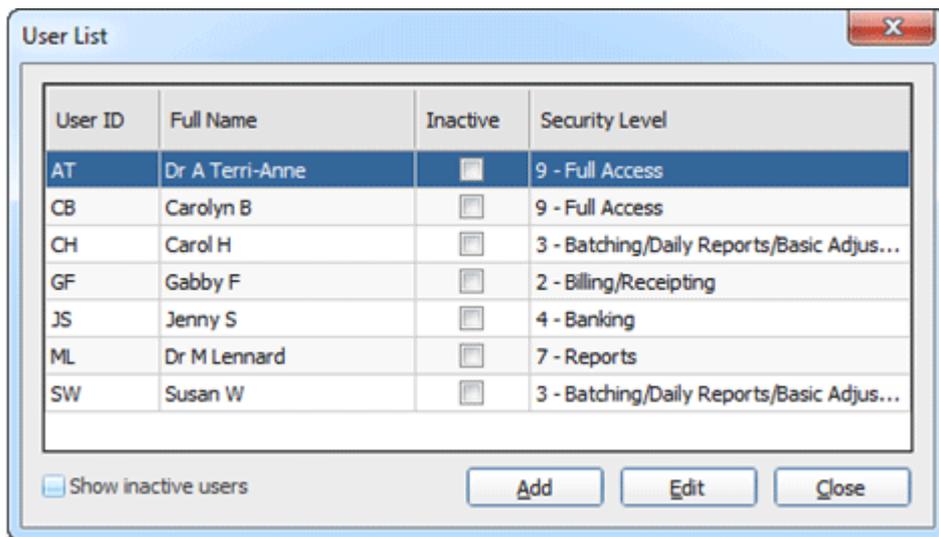
To maintain the integrity and privacy of your patient records, practice financials and staff accountability, it is recommended that each employee using MedicalDirector PracSoft have their own user account.

Note: You need to have level 9 'full' access to MedicalDirector PracSoft to perform the following steps.

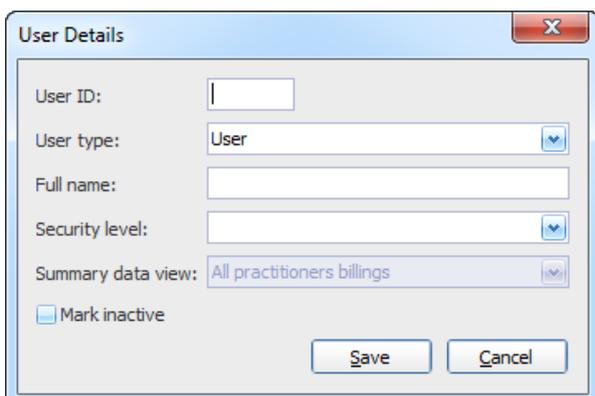
1. Log into MedicalDirector PracSoft using an account with 'Full' access (i.e. level 9 access).
2. From the menu, select **Admin > User List**.



3. The **User List** window appears. Review the current user accounts. Tick the **Show Inactive Users** check box to confirm the account does not exist.



4. Click **Add**. The **User Details** window appears.



5. Enter a unique **User ID** that will identify the staff member. Typically this is the user's initials.
6. Indicate the **User Type**, selecting 'Practitioner' for *any person or entity you wish to bill against*, or 'User' for *any other staff member*.

Note: A 'billing entity' can be an individual such as a clinician, or even an institution such as the practice itself. Regardless, if you intend to bill against them, they must be recorded as 'Practitioners' in MedicalDirector PracSoft.

7. Enter the user's **Full Name**.
8. Select their **Security Level** based on their assigned role within the practice (i.e. Level 1 = Basic access through to Level 9 = Full access).
9. For a practitioner account, nominate their level of access to the practice's financial data (i.e. None, Own Billing, All Practitioner Billing).
10. Click **Save**. You will be prompted to enter and confirm a password for this user. The passwords must contain a minimum of 6 characters. Click **Save** again to confirm the password choice.

Important: Upon creating a new 'practitioner' user account, you will be prompted to record their practitioner details. If you do not have all their details available, you can choose not to proceed with the setup. Complete the task later by;

- a. Selecting Admin > Practitioners to open the Registered Practitioners window.
- b. Click Add.
- c. Double-click the Practitioner from the list.
- d. Enter the Practitioner's details, ensuring that you enter a location name that reflects their Provider Number.
- e. For a multiple-location practice, you will be required to record a location profile for each registered address the practitioner can work from.

It is recommended you record the Practitioner's details when initially prompted in order to save confusion later. A 'Practitioner' who is an actual clinician must be added to the practice Location Certificate, and have a Provider Number entered into MedicalDirector PracSoft in order to bill patients.

A practitioner that is an 'entity' will not submit claims to Medicare, and therefore does not require a Provider Number to be recorded.

Changing Passwords

MedicalDirector strongly recommends that you change your password periodically to ensure the secure integrity of patient records. You can reset your MedicalDirector PracSoft password at any time once you have logged in to your account. In order to change your password you must first log into MedicalDirector PracSoft using your current username and password.

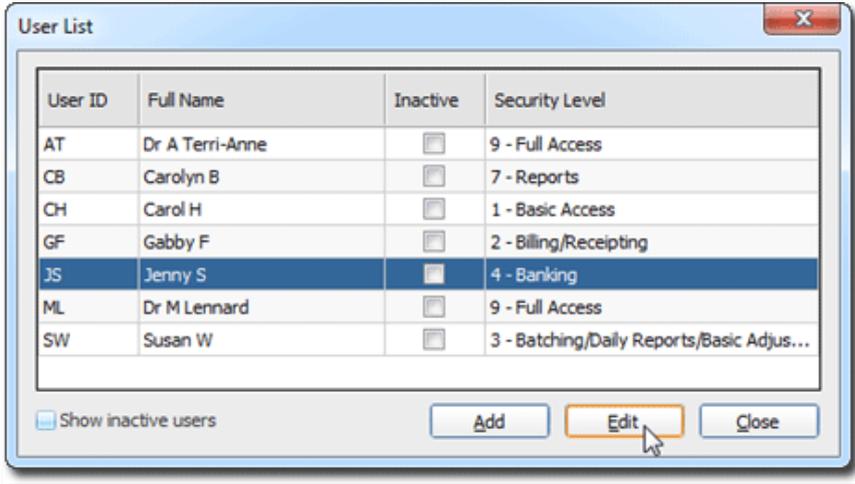
1. From the menu, select **Admin > Change Password**. The **Change Password** window appears.
2. Enter your existing password and confirm the new password
3. Click **Save** to change your password.

The screenshot shows a standard Windows-style dialog box titled "Change Password - AT". It has a close button (X) in the top right corner. The dialog contains three text input fields: "Old password:", "New password:", and "Retype new password:". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

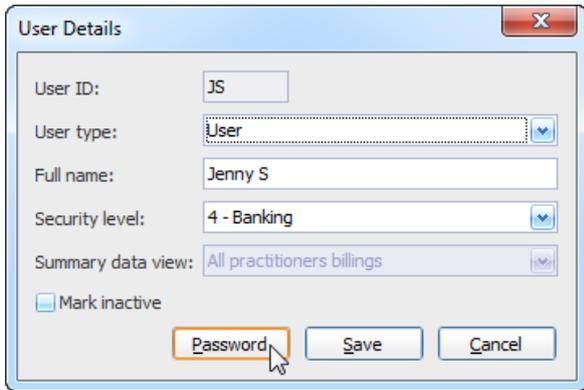
Forgotten Your Password

If you have forgotten your password and unable to login, contact your Practice Manager (i.e. someone with Level-9 access) as they will be able to reset your password on your behalf.

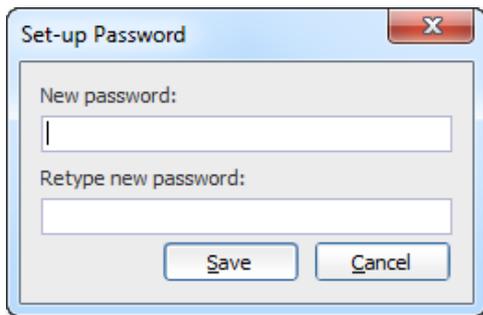
1. From the menu, select **Admin > User List**. The **User List** window appears.



2. Select the user account to change, and then click **Edit**. The **User Details** window appears.



3. Click **Password**. The **Setup Password** window appears.



4. Enter and confirm a new password for this user. Either have them type it in, or assign one to them – they can always log in and change it later.
5. Click **Save** to confirm the change.

Note: If you are also using MedicalDirector Clinical, any modification made to a password in MedicalDirector PracSoft will also change it in MedicalDirector Clinical, and vice-versa.

Setting up a General Practitioner, Locum, or Allied Health Professional

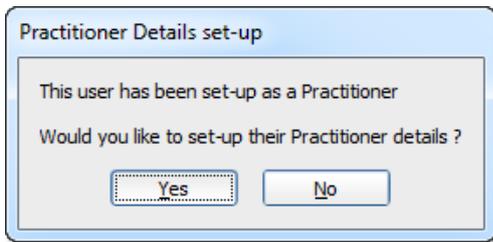
The process for setting up a General Practitioner, Locum, and Allied Health Professional records is virtually identical, except for a few key points. Unless otherwise specified, these three categories are referred to as 'Practitioners'.

Initially the practitioner is entered via the User window; refer to 'Adding User Accounts'. When a user type is nominated as a practitioner, you need to complete their registration by recording their default billing and claiming profile.

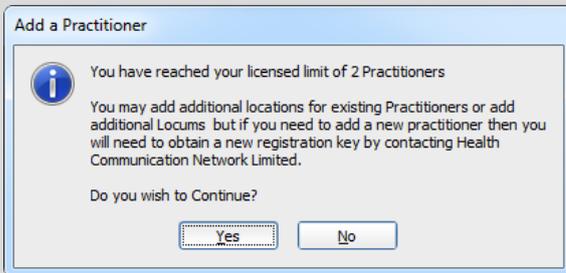
For larger practices with multiple addresses, for each location the practitioner is registered with Medicare to consult from, you will be required to record a unique practitioner profile, linked to its matching Provider Number.

MedicalDirector PracSoft licensing is set to the number of unique practitioner user accounts; therefore a practitioner can be registered multiple times and only consume a single licence.

1. In continuing the recommended sequence for creating a new practitioner account, when presented with the Practitioner Details Set-up prompt, click **Yes** to complete the second stage of their registration.



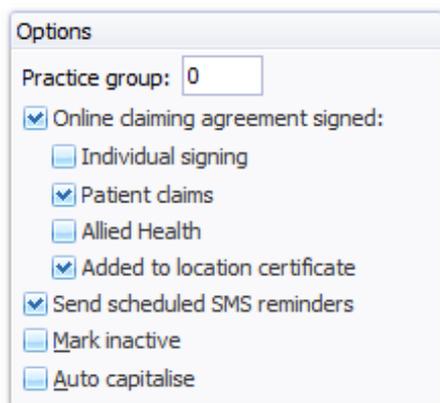
Note: At this point if you exceed the licensed number of active practitioners, you will be prompted with a message to obtain a new Licence Key for the practitioner, click No and contact your regional account manager at MedicalDirector for a new licence key. If you are however setting up a locum profile to cover a practitioner in their absence, click Yes to proceed.



2. Enter the Practitioner's details (e.g. Medical Practitioner), including Location, Provider No as supplied by Medicare, HPI-I number (if known), Practitioner type, Letterhead, Practitioner status, and nominate their Bank Account. For more information refer to the description of each field outlined below.

Field	Description
Location	Enter the name of where the practitioner will be consulting. Ensure you enter the correct location name, as once entered it cannot be changed or deleted. If the practitioner no longer consults from that address, you have to mark the practitioner's location profile as inactive and then create a <i>new practitioner profile</i> containing the correct location.
LSPN	If registered for, enter the Location Specific Practice Number, issued by Medicare to practitioners that use diagnostic equipment (e.g. ultrasound devices)
Provider No	Enter the Practitioner's Provider Number for the location specified. Tick the Validate Provider No check box if the practitioner account will be used to conduct online claiming. Practitioner accounts that are <i>entities</i> should leave this check box <i>un-ticked</i> .
HPI-I No	Enter the Practitioner's HPI-I (Healthcare Provider Identifier- Individual) number, supplied by AHPRA (Australian Health Practitioner Regulation Agency).
Practitioner Type	Select a Practitioner Type from the list provided, or free-type a description. For Allied Health workers, you must select from one of the supplied types if you wish to conduct online claiming.
Referral Required	Specify whether a referral is required to consult with this practitioner. Most Allied Health Practitioners will require a referral.
Letterhead	Select which Letterhead you wish to use for this practitioner.
Bank Account	Select which bank account you wish to use for this practitioner. Nominate a central account or a unique bank account per practitioner.
Practitioner Status	Define the Practitioner's employment status in the practice. If you are a locum, select 'Locum Tenens'. This then activates the Locum For drop-down list from which you select the practitioner you are a locum for. Note that locums do not have access to select a different Letterhead, Bank Account, Payee Provider No., and various Default Billing fields. These settings are inherited from the selected 'Locum For' practitioner.

- If using Online Claiming with Medicare, confirm what agreements the practitioner has signed and submitted to Medicare. Also confirm whether the practitioner wants to send patient SMS Reminders.



Field	Description
Practice Group	Allows you to assign this practitioner to a group. Practice Groups are used in financial statements, where you may wish to view statements for a specific group of employees.
Online Claiming Agreement Signed check box	Allows you to indicate that Medicare's Online Claiming Agreement has been signed by this practitioner. This Agreement allows for the processing of Medicare online payments without the need for a token. This option is only available if Online Claiming has been enabled.
Individual Signing check box	Allows you to select individual signing of Medicare claims for this practitioner using an ikey - a USB stick provided by Medicare that you connect to the computer when preparing claims.
Patient Claims check box	Tick if this practitioner wants to generate patient claiming for private billing.

Allied Health check box	<p>Tick to indicate if this user is <i>specifically</i> an Allied Health worker. If this box is ticked;</p> <ul style="list-style-type: none"> ○ The D1216S form is printed for DVA Allied Health Workers, when the user clicks Voucher in the Record Visit window. ○ The DB4-AD form is printed for Medicare Bulk-Bill Allied Health Workers, when the user clicks Voucher in the Record Visit window.
Added to Location Certificate	<p>Verifies that the practitioner has been added to the Location Certificate, enabling Online Claiming. A warning will be displayed when saving the practitioner's details if the practitioner is registered for Online Claiming but has not confirmed they have been added to the Location Certificate. Contact Medicare to have your location certificate updated.</p>
Send Scheduled SMS Reminders	<p>Indicates whether this practitioner chooses to send patients SMS reminders. Additional details are required before SMS reminders can be sent.</p>
Mark Inactive	<p>Tick this check box if the practitioner is no longer active; either no longer working for the practice or no longer consulting at the location listed.</p>

- Specify the default Item Number, if appropriate.
- From the concession types, nominate the Practitioner's default billing. Choose either to private bill by selecting a fees column drop down, or alternatively tick to offer bulk billing. As an option, use a combination of the two; privately billing patients with no concession or discount, and offering bulk bill to health care card holders and pensioners.

Default billing item No and fees

Item No:

No concessions: Bulk Bill

Discount concession: Bulk Bill

Health Care Card: Bulk Bill

Pensioner: Bulk Bill

Veterans Affairs:

GST: %

Default billing item No and fees

Item No:

No concessions: Bulk Bill

Discount concession: Bulk Bill

Health Care Card: Bulk Bill

Pensioner: Bulk Bill

Veterans Affairs:

GST: %

Note: Regarding concessions and the Record Visit window: *The Practitioner's concession selection relies on the patient being nominated with a concession type. If not entered, the patient will be recorded with no concession.*

Other payment information

Concessions:

DVA file No:

Entitlement No:

HCC expiry date:

Insurance:

Field	Description
Item No	Select the default Item No your patient will be billed (e.g. Item No. 23 – Level B Consult)
Fees	<p>Select a pre-defined default fee for each of the following patient types:</p> <ul style="list-style-type: none"> ○ No Concession ○ Discount Concession ○ Health Care Card ○ Pensioner ○ Veteran Affairs
GST	Indicate whether GST is added for items billed by this practitioner, and record the percentage.

- Specify whether Medicare Plus is available to the practitioner for bulk billing patients under the age of 16, or pensioners. When a practitioner has been flagged in the Incentive Payments section, incentive payments are automatically added as an item when recording a visit.



Field	Description
Medicare Plus	<p>The Incentive Payments section allows you to flag a practitioner as being eligible to receive Medicare Plus and VAP (Department of Veterans' Affairs) incentive payments.</p> <p>The options are:</p> <ul style="list-style-type: none"> ○ None - If the practitioner is not eligible to receive incentive payments. ○ MediCare Plus Rural - If the practitioner is consulting in one of the rural or regional areas specified by Medicare. ○ MediCare Plus - If the practitioner is consulting in a metropolitan area.
Apply VAP Incentive	This check box can only be selected if the practitioner is a LMO (Local Medical Officer).

- Click **Save** to confirm the Practitioner's details.

Registering a Practitioner to use GST

For a practitioner to charge GST when recording service performed, there are two components you need to configure:

1. **You must specify the practitioner charges GST for services/items that contain a GST component, and indicate the current percentage rate;**

- a. Select **Admin > Practitioners**. Locate and open the Practitioner’s record you wish to edit.
- b. In the **Default Billing** section, select the option to charge GST, and enter the percentage rate.

Default billing item No and fees

Item No: 23

No concessions: Private Fee Bulk Bill

Discount concession: Standard Fee Bulk Bill

Health Care Card: Bulk Bill

Pensioner: Bulk Bill

Veterans Affairs: Veteran Fee

GST: Yes 10.00 %

- c. Click **Save** to confirm these settings.

2. **You must specify for each Service Item whether GST will be added to the base fee;**

- a. Select **Admin > Fees**. The **Fee Listing** window appears.
- b. For any Service Items you want to apply a GST charge, **remove** the tick from the GST Not Applicable column.

Item No	Description	Op Rule	Derived Fee	Tax Rate	GST Not Applicable	Report Group	Attendance Item	S F
TRAVVAC	Travel Vaccine	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	
WCO001	Certificate of Capacity	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input type="checkbox"/>	
WCO002	Case Conference	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input type="checkbox"/>	
WCO004	Other Medical Items	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	
WCO005	Medical Records	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	

- c. For any Service Items that do not attract at GST charge, add the **tick** in the GST Not Applicable column.
- d. Click **Close** when you have finished.
- e. You will be prompted to save the changes you made to the fee structure.

3. When recording a patient visit, the Practitioner’s service charge will be GST inclusive. Confirm the details in the GST Rate and GST Amount columns.

Service details

Item No	Description	Fee GST Ind	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	Text
AA020	Level B Consultation	<input type="checkbox"/>	\$71.00	\$71.00	AMA Fee	0.00	\$0.00	\$71.00	
WCO002	Case Conference	<input checked="" type="checkbox"/>	\$24.20	\$24.20	AMA Fee	10.00	\$2.20	\$24.20	

\$95.20 \$95.20 \$2.20 \$95.20

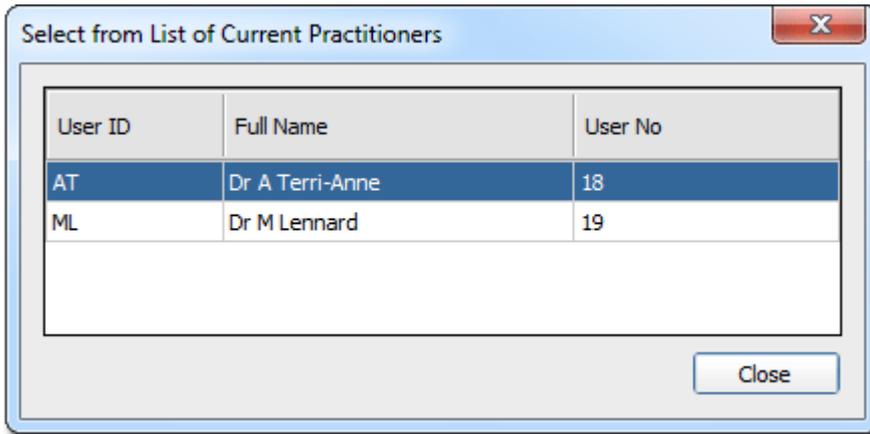
In hospital Apply incentive

Setting up a Practitioner over Multiple Locations

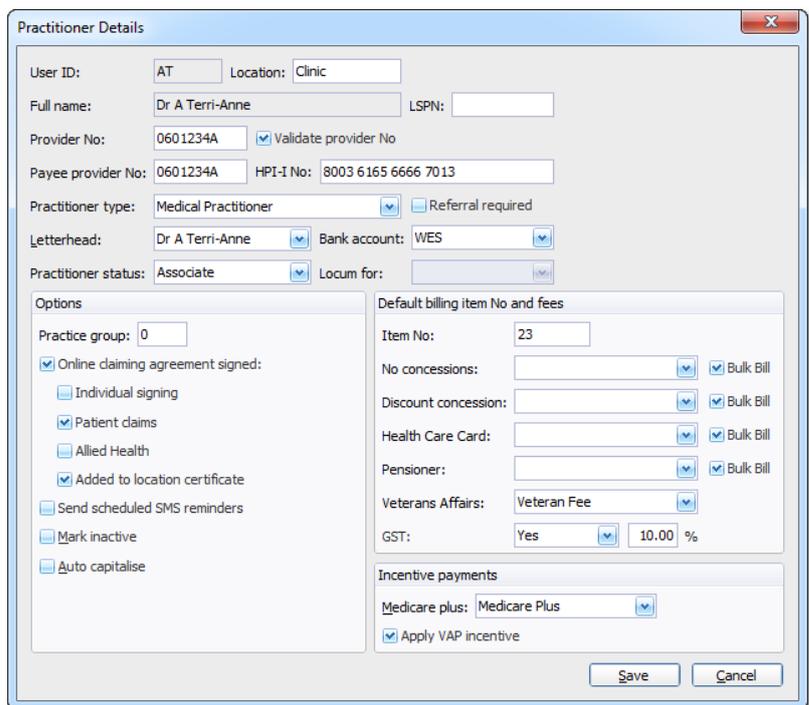
When a practitioner consults across multiple addresses (e.g. Surgery, a second Surgery address, Nursing Home, Hospital etc.), each physical location must be recorded in MedicalDirector PracSoft. In order to submit online claims to Medicare, the Practitioner’s details (i.e. Provider No) need to match the location at which that the consultation occurred.

*Note: Adding a new location to a current practitioner does **not** reduce the amount of available licences.*

1. Select **Admin > Practitioners**. The **Registered Practitioners** window appears.
2. To record a new location for the practitioner, click **Add**.
3. Double-click the record of the practitioner you wish to record a new location for.



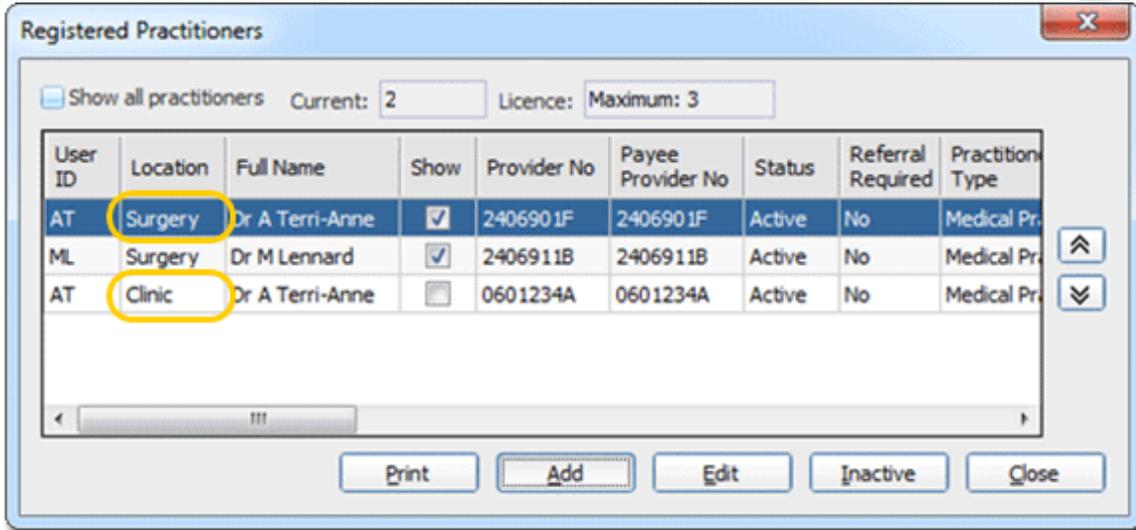
4. Enter the Practitioner’s details (e.g. Medical Practitioner) including Location, Provider No as supplied by Medicare, HPI-I Number, Practitioner Type, Letterhead, Practitioner Status, Bank Account, Online Claiming, Default Billing, and Incentive Payments.



Note: Once you have created a new location, you are not able to alter this field in the future. It is therefore vital that you enter an appropriate value that is consistent with the other practitioner locations.

Note: The location field contains up to a maximum of seven characters. As options, either a generic name (e.g. Surgery, Clinic, etc.) or an abbreviation of the suburb name.

- Click **Save**. You will be returned to the Registered Practitioners window. The practitioner is listed separately for each location at which they practice.



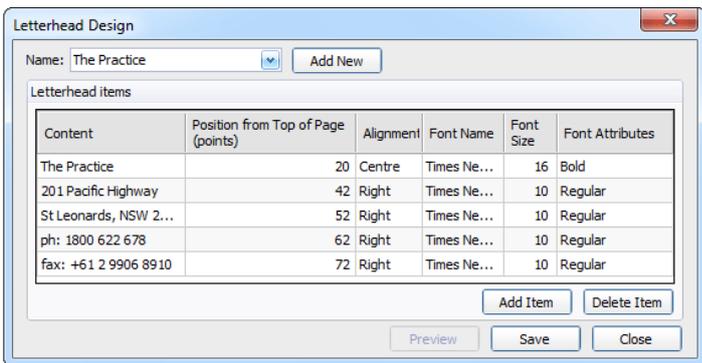
Tip: For practices with multiple locations, customise each user profile via the check box within the **Show** column to reflect the practitioners who consult from that location. For example the receptionist working at the Surgery location would 'show' the two practitioners, whilst the receptionist at the Clinic would have the one practitioner displayed.

Note: Practitioners who perform onsite visits to Nursing Homes, Home visits, or Hospitals do not require a separate location to be recorded in MedicalDirector PracSoft; the Provider Number issued by Medicare covers these other locations.

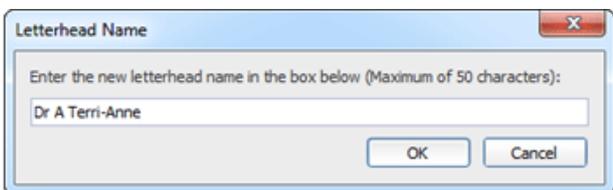
Creating a Practitioner Letterhead

Along with the practice letterhead, as an option a practitioner can have their details recorded on the top of an account/receipt statement. A Practitioner's letterhead is created in the same way as the practice's letterhead.

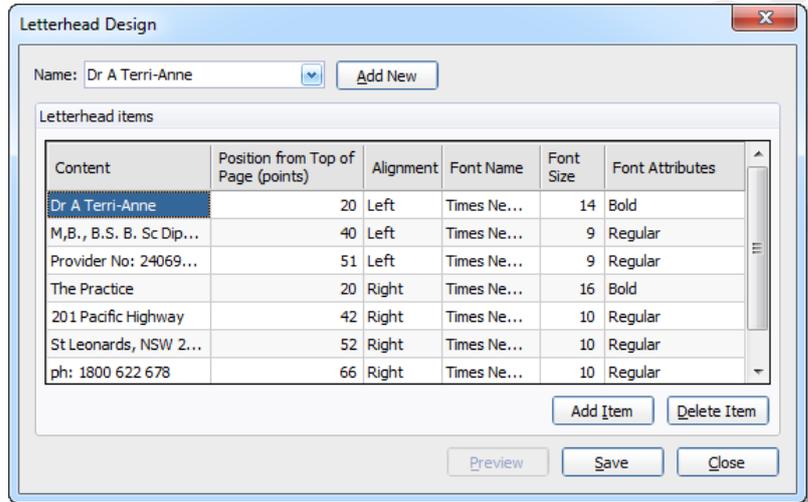
- From the menu, select **Setup > Letterheads**. The **Letterhead Design** window appears.



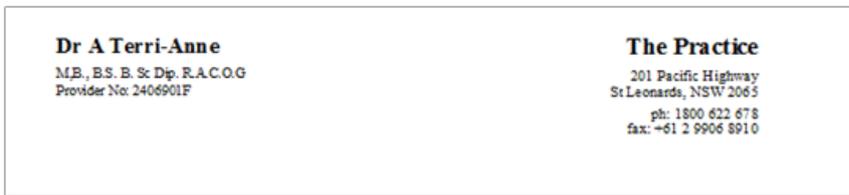
- Click **Add New** to begin creating the Practitioner's letterhead.



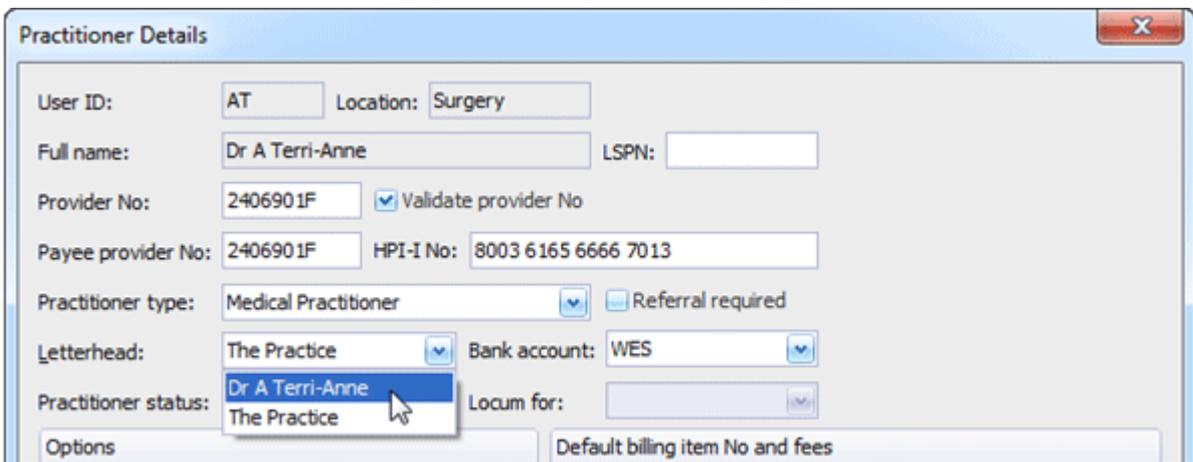
3. Enter the Letterhead details by typing in a value within the **Content** field.
4. Adjust the Alignment, Font Name, Size and Font Attributes.
5. Click **Add Item** to record additional lines of content.
6. Click **Save** to record the values entered.



7. Click **Preview** to review the content and layout of the letterhead.



8. If required, add any additional content and/or alter the layout of the design. To finish, click **Close**.
9. With the new letterhead created, the next step is to assign the letter to practitioner's profile. From the menu, select **Admin > Practitioners**.
10. Within the Practitioner Details window, use the Letterhead drop-down list to select the letterhead you just made.



Important: After creating a practitioner's location profile, the next step is to add them to the Appointment Book. Refer to the topic on synchronising practitioners.

Patient Details

Searching for Patient Records

Quickly accessing patient records in MedicalDirector PracSoft is critical to developing a seamless workflow into your practice operations. There are several ways to search for a Patient's record.

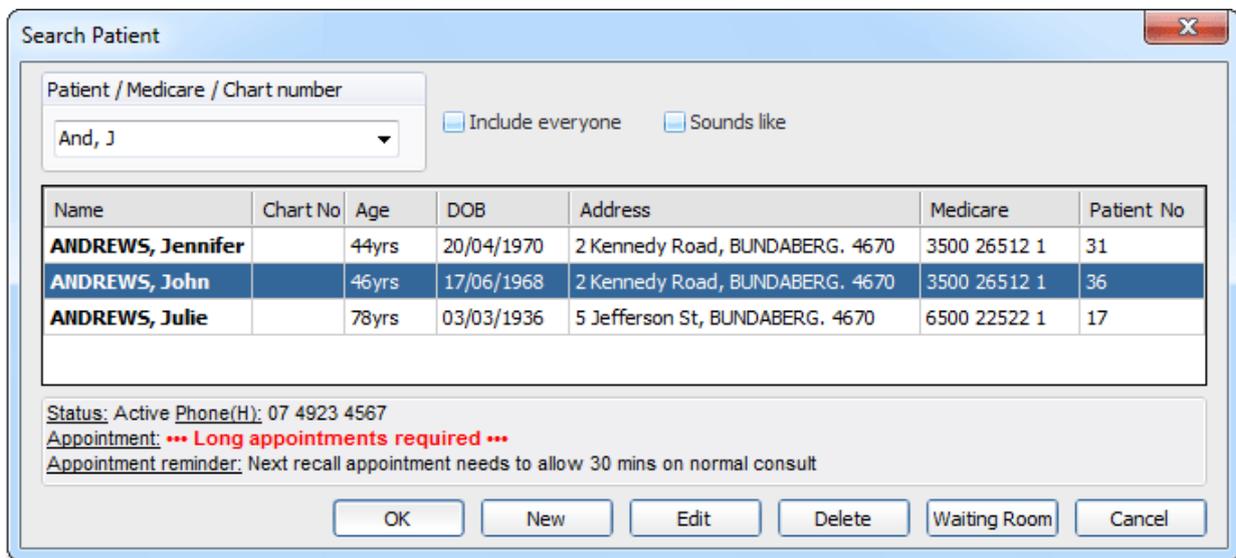
*Tip: When performing a search, if you are unable to locate the patient, tick the **Include Everybody** check box to display all inactive patients, and patient next of kin and emergency contacts.*

Perform a Search

1. From within the Waiting Room window, either:

- Click the **Search Patient**  button
- Select **Patient > Search Patient**
- Press **F2**

2. Type in the Patient's identifying details, starting with the **Surname** then **First Name**. Alternatively, enter the Patient's **Medicare Number** or **Chart Number** in the search field.



Search Patient

Patient / Medicare / Chart number

And, J Include everyone Sounds like

Name	Chart No	Age	DOB	Address	Medicare	Patient No
ANDREWS, Jennifer		44yrs	20/04/1970	2 Kennedy Road, BUNDABERG. 4670	3500 26512 1	31
ANDREWS, John		46yrs	17/06/1968	2 Kennedy Road, BUNDABERG. 4670	3500 26512 1	36
ANDREWS, Julie		78yrs	03/03/1936	5 Jefferson St, BUNDABERG. 4670	6500 22522 1	17

Status: Active Phone(H): 07 4923 4567
 Appointment: ***** Long appointments required *****
 Appointment reminder: Next recall appointment needs to allow 30 mins on normal consult

OK New Edit Delete Waiting Room Cancel

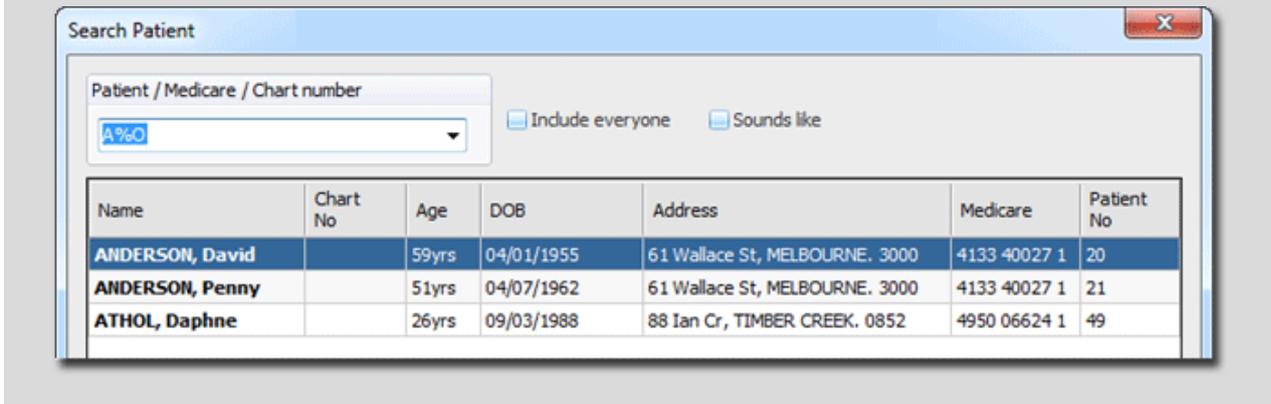
Tip: As you type the Patient's name, the search list will dynamically display matching names.

Tip: In selecting Include Everyone, note the patient status is reflected in the colour and also displayed at the bottom of the screen.

3. From the list, perform an action on the selected patient record. Options include;

- Click **OK** to open the selected Patient's details.
- Click **New** if the patient is not found, and you wish to record the details of a new patient.
- Click **Edit** to update the Patient's details.
- Click **Delete** to delete the Patient's record. Patients with historical account data can *never* be deleted, but *can* instead be flagged as 'Inactive'. If a patient is accidentally deleted, restore their profile via the Patient Reviver tool in MedicalDirector Maintenance.
- Click **Waiting Room** to add the patient to the list of patients awaiting a consultation.

Tip: If you are not sure how to spell the Patient's name, insert a % symbol to represent letters you are unsure of. For example, typing "A%O" will list names that begin with "A" followed by any number of letters, followed then with "O", as shown in the example below.



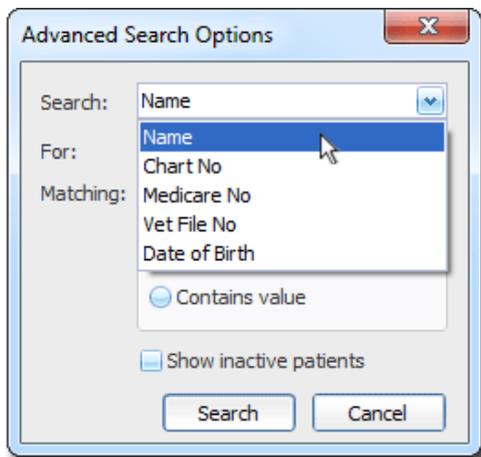
Advanced Search

If you do not have enough specific information about the patient, you can conduct an advanced search of the patient database.

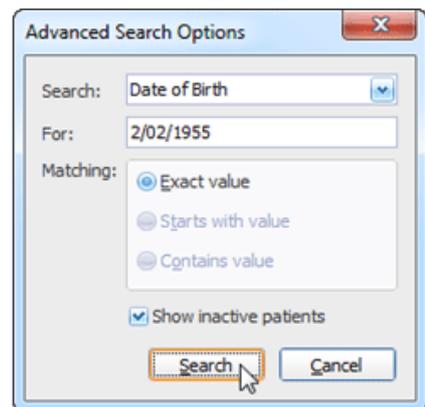
1. From within the Waiting Room window, either:

- Click the **Advanced Search for Patient**  button.
- Select **Patient > Advanced Patient Search**.

2. Via the **Search** drop-down list, select the type of information you want to search for. Options include Name, Chart Number, Medicare Number, Vet File Number, and Date-of-Birth.



3. Enter the search term(s) in the **For** field.
4. Select the scope of the search from the **Matching** options.
5. (Optional) Include inactive patient records in the search results by ticking the **Show Inactive Patients** check box.
6. Click **Search** to run the advanced search. If multiple patients match the search criteria, select the patient from the displayed list.



- If one patient is located, the Patient Details window will open and display the Patient's record.

Patient name: RAIN Mr Jacob Bastien ATSI: Neither Aboriginal nor Torres Strait Islander

Date of birth: 02/02/1955 Chart No: Ethnicity: Swiss

Status: Active Chart type: Permanent Refer to:

Payer: Self Referred by:

Held accounts: None Expiry date:

Patient Details Next of Kin \$ Accounts \$ Visits Notes

Address: 18 O'Halloran St
Kambah ACT 2902

Postal address: 18 O'Halloran St
Kambah ACT 2902

Home: (02) 6131 7421

Work:

Mobile: 0420125488

Fax:

Email:

Sex: Male

Age: 59yrs 8mths

Marital status: Married

Regular practitioner:

Insurance: None

Occupation: Manager

Emergency Contact: RAIN Mrs Shannon

Home:

Mobile:

Medicare No: 2950 14362 1 1

Expires: 31/12/2018

Country of birth: Switzerland

Yr of Arrival in Aus: 1992

Spoken Language: Swiss

Preferred Language: Swiss

Interpreter Required:

Concessions: None

DVA file No:

Entitlement No:

HCC expiry:

IHI No: 8003 6023 4568 5641

IHI Record Status: Verified

IHI No Status: Active

IHI History Validate

Options Related Add (F3) Refresh Print Edit Close

Note: If there is only one match in the database, MedicalDirector PracSoft will immediately open that patient's record. If there are no results found, or multiple matches found, the Search Patient window will appear, enabling you to select the specific patient from a list by comparing patient details.

Search via Medicare Card Swipe

- From within the Waiting Room window, either:
 - Click the **Search Patient**  button
 - Select **Patient > Search Patient**
 - Press **F2**
- Swipe the Patient's **Medicare card**. The Search Patient window becomes populated with the names of any patients registered to that card.

Creating a Patient Record

As a new patient presents to the practice, they will be required to complete the practice's *new patient* form. Once completed, you will be required to enter the Patient's details into MedicalDirector PracSoft, after which they can be added to the waiting room list, at which time the practitioner can then open their clinical record in MedicalDirector Clinical.

*Note: Before adding a new patient, it is recommended that you first conduct a search in your existing patient database to ensure that the patient does not already exist. When searching for patients, tick the **Include Everyone** check box to also search through inactive patients, emergency and next of kin contacts. If the patient is recorded as inactive or as a contact, edit their existing profile adjusting their status to be listed as active.*

*Note: Depending on your practice's policy, you can add a patient directly to the patient database without performing a search. Click **Add New Patient** or press **F6** on the keyboard. After entering the person's details, if a matching or similar patient is found, you will be prompted to either create a new patient profile or edit the existing one.*

Note: When creating a new patient profile, it is important that you do not introduce duplicate patient records.

1. From the Waiting Room window, perform a search

- o Click **Search Patient**  button
- o Press **F2**

2. Enter the Patient's **Surname** and **First name**. Tick the **Include Everyone** check box to include Inactive, Next of Kin, and Emergency Contacts.

3. Perform a search to confirm if the patient is already recorded within your database.

4. If the patient is not recorded, click **New**. The **Add New Patient** window appears.

5. Within the Add New Patient window enter the patient's details including Title, Name, DOB, and Sex.

Title:	First name:	Middle name:	Surname:	Known as:	Date of birth:	Sex:
Miss	Megan	Juliet	Platt		30/08/2010	Female

6. Assign the patient an **Active status** (alternatively a Visitor). If requested by the patient, assign them a **Regular practitioner**. The selected practitioner will automatically be listed for a walk-in patient.

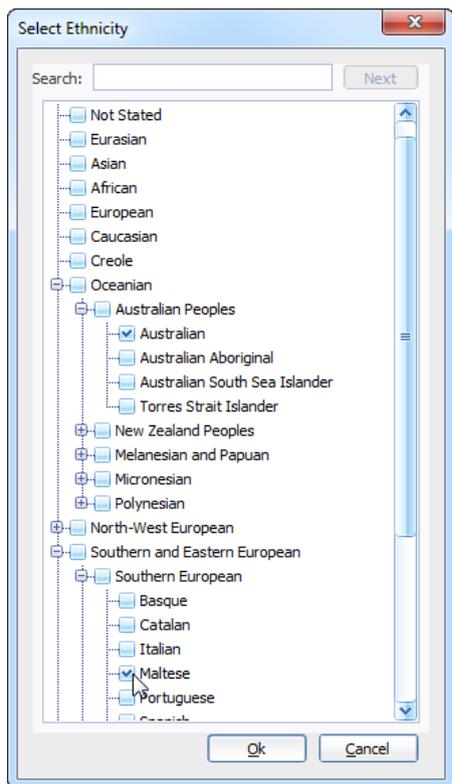
Status:
Active
Regular practitioner:
AT - Surgery

7. As advised, nominate the patient's **ATSI** classification.

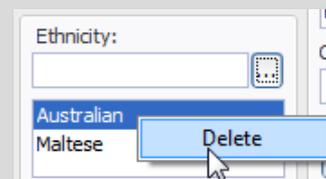
ATSI:	Alias First Nar
<ul style="list-style-type: none"> Aboriginal Torres Strait Islander Aboriginal and Torres Strait Islander Neither Aboriginal nor Torres Strait Islander 	Chart type:



- If supplied by the patient, record their **Ethnicity**. Type the ethnicity in the search field, or expand the list of ethnicity groups to select one or more ethnicities. Click **OK** to confirm the selection.



Note: If a mistake was made in recording an ethnicity, select the listing **right-click > Delete**.



- Insert the patient's **Medicare No** and **Expiry date**. If the patient's name is different on their Medicare card, enter the details as they appear on the card into the **Alias** fields.

Medicare No: Expiry date:

If the patient's name is different on the Medicare Card

Alias Surname:

Alias First Name:

Tip: If you have the patient's Medicare Card, you can quickly add their demographic information to this window by clicking in the **Medicare No** field, and swiping their card.

- If required by the practice, click **Allocate Chart Number**. This step will assign the patient a unique reference number, designed to link paper based files to an electronic system.
- The patient's IHI Number (Individual Healthcare Identifier) is a value you cannot directly enter. After saving the patient's profile, from the Patient Details window. Click **Validate** to confirm the patient's details (including First Name, Last Name, Date of Birth, Gender; Medicare Card; or Veterans Card).

IHI No:

IHI Record Status:

IHI No Status:

12. On the **Payment Details** tab, insert the Payer details (used for Private billing); choose **Self** for the patient to settle their own account, or **Other** for a dependent to assign their principal account holder.
13. Nominate the patient's concession entitlements. If required, also enter their Entitlement Number and Expiry Date.

The screenshot shows the 'Payment Details' tab with the following fields and values:

- Payer details:** Payer: Self, Other
- Other payment information:**
 - Concessions: None
 - DVA file No: None
 - Entitlement No: Pensioner
 - HCC expiry date: Veteran - All
 - Insurance: Veteran - Specified

14. On the **Address/Phone** tab, insert the phone/postal address and contact details.

The screenshot shows the 'Address/Phone' tab with the following fields and values:

- Address:** Street: 24 Trent Street, Suburb: ST LEONARDS, State: NSW, Postcode: 2065
- Postal Address:** Home: 02 9874 4514, Work: , Fax: , Mobile: 0421125154, Email:
- Do not send SMS

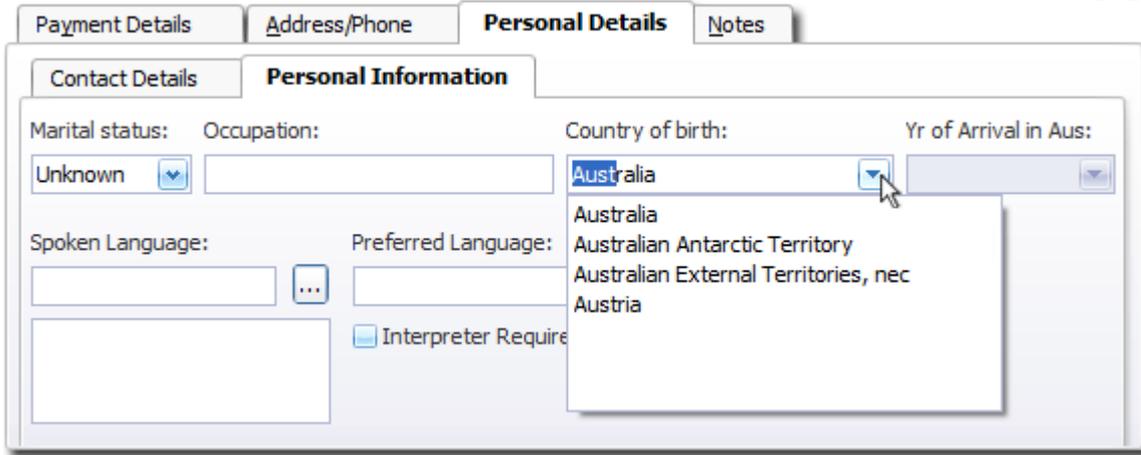
Important: If using SMS technology, you may need to indicate whether the patient does **not** wish to receive appointment reminders.

15. On the **Personal Details** tab, select the **Contact Details** tab
16. Enter the patient's **Next of Kin** and **Emergency Contact** details. Click **Select** to search for the patient's Next of Kin and/or Emergency Contact. For more information refer to the steps in Allocating a Next of Kin or Allocating an Emergency Contact.

The screenshot shows the 'Personal Details' tab with the following fields and values:

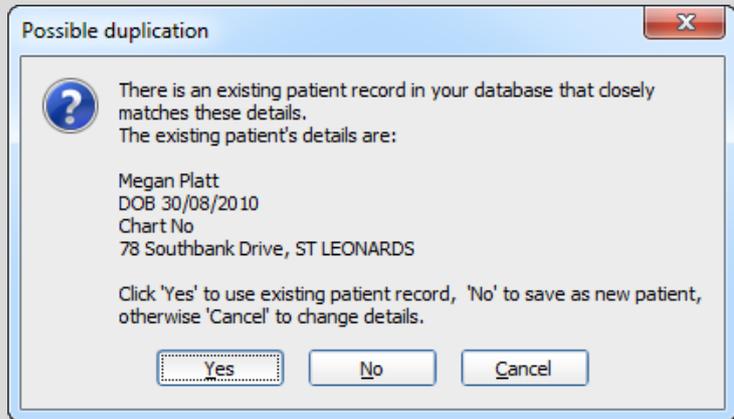
- Contact Details:**
 - Next of Kin: Andrews, Judy (Buttons: Select..., Edit, Remove)
 - Relationship: Parent (Dropdown), Other:
 - Same as Next of Kin
 - Emergency Contact: (Buttons: Select..., Edit, Remove)
 - Relationship: (Dropdown), Other:

17. Still within the Personal Details tab, select the **Personal Information** tab. If known, select the patient's **Marital status, Occupation, Country of birth, Year of Arrival in Australia, Spoken Language, Preferred Language** and **Interpreter Required**.

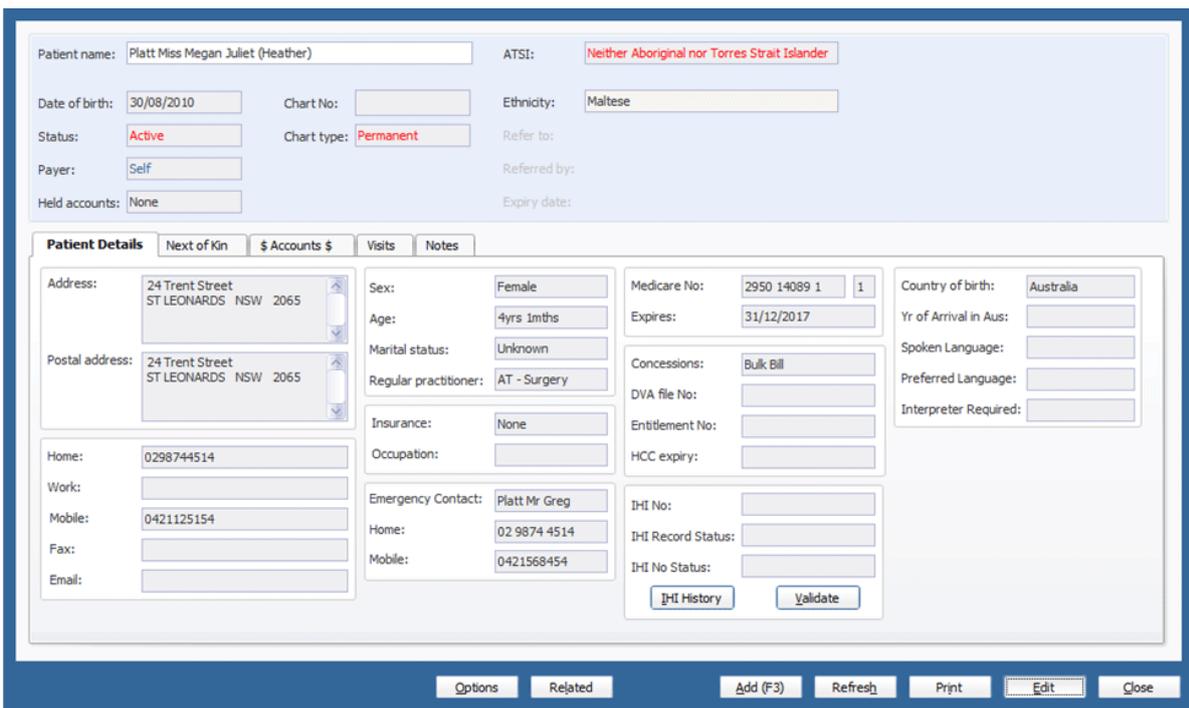


18. Click **Waiting Room** to simultaneously save the patient's details and add them directly to the Waiting Room. Alternatively, click **Save** to add the patient's record to the database.

Important: *If the details you are saving closely match the record of another patient, you will be prompted with a 'potential duplicate' warning.*



19. In saving the patient's record, you will be presented with the **Patient Details** window.





20. Review the patient information, ensuring the details were correctly entered.
21. As an option to verify the patient’s details, click **Validate** to retrieve the patient’s IHI number.

Allocating Next of Kin

A *Next of Kin* contact is someone who is nominated by the patient, and does not have to be someone directly related to the patient. If you have indicated that a patient’s status is next of kin for another patient, and then they themselves wish to receive services as a patient at your practice, you *must* change their status from next of kin to either 'active' or 'visiting'.

1. From the Add/Edit Patient window, select the **Personal Details** tab.
2. Within the Contact Details tab, click **Select** associated with Next of Kin.

3. The **Select Next of Kin for...** window appears; displaying a list of people with the same surname. From this initial search, either **Select** a person from the list or perform a **Search** with a different name. Locate the person you are looking for, and click **OK**.

*Tip: When searching for a person, ensure that you tick the **Include Everybody** check box to display all records in the MedicalDirector PracSoft database.*

4. If you are unable to locate the next of kin, you will be required to create a record for them.
5. Locate the person you are looking for, and click **OK**. If however you are unable to locate the person, you may be required to create a record for them.



Creating a New Next of Kin Record

The following instructions continue from Step 4, above.

1. From the **Select Next of Kin for...** window, click **New**. The **Add Next of Kin** window appears.

2. Enter the Next of Kin's details.
3. Ensure their Status is **Next of Kin**, as shown above.
4. Enter the Next of Kin's remaining details as supplied, including **Address** and **Contact details**.
5. Click **Save** to enter the person into the database. You will be returned to the search window. Note the Next of Kin record appears, in **blue italics**.

Name	Chart No	Age	DOB	Address	Medicare	Patient No
<i>Platt, Judy</i>				<i>24 Trent Street, ST LEONARDS. 2065</i>	<i>2950 14089 1</i>	<i>44</i>

6. Select the Next of Kin record, and click **OK** to return to the patient's record.
7. Define the **Relationship** of the Next of Kin to the patient.
8. Continue onto specifying the patient's Emergency Contact.

Note: If you create a new Next of Kin record in this manner, and then the Next of Kin contact becomes a patient within the practice database, although they can continue to serve as the Next of Kin for another patient, their status must be changed to either 'Active' or 'Visiting'.

Allocating an Emergency Contact

An 'Emergency Contact' record is someone who acts as the emergency contact for a patient, but who themselves may or may not be an active patient at your practice. If you have indicated that a person's status is the emergency contact for a patient, and then they themselves wish to receive services as a patient at your practice, you *must* change their status to either 'active' or 'visiting'.

If the Emergency Contact is the same as the Next of Kin

1. Within the Contact Details tab, tick the **Same as Next of Kin** check box.





If the Emergency Contact is different from the Next of Kin

1. Within the Contact Details tab, click **Select** associated with the Emergency Contact field.

2. The **Select Emergency Contact for...** window; displays a list of people with the same surname. From this initial search, either **Select** a person from the list or perform a **Search** with a different name.
3. Locate the person you are looking for, click **OK**. If you are unable to locate the person you may be required to create a record for them, as explained below.

Create an Emergency Contact Record

The following instructions continue from Step 6, above.

1. From the Select Emergency Contact for... window, click **New**. The **Add Emergency Contact** window appears.

2. Enter the Emergency Contact's details.
3. Ensure their Status is **Emergency Contact**, as shown above.
4. Enter the person's remaining information as supplied, including **Address** and **Contact details**.
5. Click **Save** to create the record as an emergency contact for the previous patient. You will be returned to the search window, where the new record now appears, in **red italics**.

Name	Chart No	Age	DOB	Address	Medicare	Patient No
<i>Platt, Greg</i>				<i>24 Turner Street, ST LEONARDS. 2065</i>	<i>2950 14089 1</i>	<i>45</i>

6. Select the Emergency Contact record, and click **OK** to return to the patient's record.
7. Define the **Relationship** of the Emergency Contact record to the patient.
8. Click **Save** to confirm.

Note: If you create a new Emergency Contact record in this manner, and then the Emergency Contact becomes a patient within the practice database, although they can continue to serve as the Emergency Contact for another patient, their status must be changed to either 'Active' or 'Visiting'.

Allocating Other Payer

If the patient is classified as a dependent, you can consolidate the private billing charges, referring them to another account.

1. From the Edit Patient window, select the **Payment Details** tab.
2. Within the Payer Details section, select the **Other** (payer) option.

The screenshot shows the 'Payment Details' window with the 'Payment Details' tab selected. The 'Payer details' section on the left has 'Other' selected with a radio button. The 'Other payment information' section on the right contains the following fields: 'Concessions' (dropdown menu set to 'None'), 'DVA file No:' (text input), 'Entitlement No:' (text input), 'HCC expiry date:' (text input), and 'Insurance' (dropdown menu set to 'None').

3. The **Select Payer for...** window displays a list of people with the same surname. From this initial search, **Select a Person** from the list or conduct a **Search** with a different name.
4. Locate the person you are looking for, click **OK**. The patient's record now displays the name of their payer.

The screenshot shows the 'Payment Details' window after a payer has been selected. The 'Payer details' section on the left now shows 'Other' selected with a radio button, and the name 'Platt, Judy' is displayed below it. The 'Other payment information' section on the right remains the same as in the previous screenshot.

Important: Before saving, always confirm that you have selected the correct person to be the payer. If there was a mistake made, correct the error immediately.

5. Click **Save** to update the patient's record.

Create an 'Other Payer' Account

If you are unable to locate the person you may be required to create a new record for them. The following steps continue from Step 3, where the other payer is not recorded within your database.

1. From the search results, click **New**. The **Add New Patient** window appears.
2. Enter the payer's details, ensuring that you record their **Name, DOB and Medicare details**.

3. Ensure their Status is 'Next of Kin', as shown above.
4. On the Address tab, enter the person's remaining information as supplied, including **Address** and **Contact details**
5. Click **Save** to confirm. You will be returned to the Select Payer for... window.

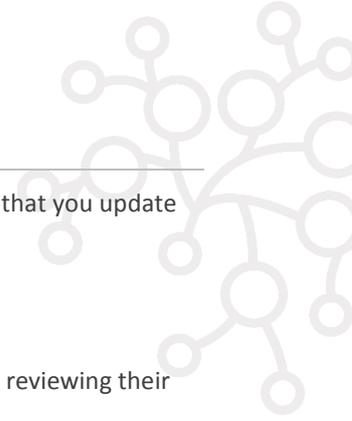
Important: When creating a payer account, if you will be submitting an electronic claim to Medicare you must include additional detail as part of the new person's (payer) record, in particular their Medicare Number. If you attempt to submit a claim without it you will receive an error.

Tip: In allocating another payer, you can combine the payment of two or more private visits into the one single payable service. From within the Waiting Room, tick 'Select Multiple Patients' option, nominate the patient's and record the billable item numbers for each patient.

New Family Member

In addition to the benefit of allocating someone else to manage the patient's account, the 'Other Payer' option allows the new patient to automatically inherit the other person's details, including: Address, Home phone, Medicare number, Concession type, Chart Number and their nominated as the patient's Next of Kin. In using this functionality, by linking to a parent within the database, it can dramatically reduce the length of time required to capture a new family member.

1. Record the initial details about the patient, including Title, Name, DOB and Gender
2. Within the Payer Details tab, select the **Other** option.
3. The **Select Payer for...** window displays a list of people with the same surname. From this initial search, **Select a Person** from the list or conduct a **Search** with a different name.
4. Locate the person you are looking for, click **OK**.
5. The new patient's record will inherit the principle details from the person you nominated.
6. Review the inherited Medicare number, ensuring the suffix number and expiry date are correct. Also review the patient's concession entitlements and requirement to create a new chart number.
7. Continue to record the remaining patient information as supplied.



Editing Patient Records

When confirming the contact details of the patient, if there is a discrepancy in your records it is vital that you update the incorrect information, ideally *before* their consultation.

1. From the Waiting Room window, locate the patient.
2. **Right-click** on the patient's name, select **Edit**.
3. From the Edit Patient Details window, update their record as advised by the patient. In particular reviewing their address, contact number and Medicare details.
4. Click **Save** to confirm the changes.

Important: After editing the patient's record, in particular their name or Medicare details, it is recommended that you validate the changes against Medicare by performing an OPV check.

Related Patients

After editing a patient's record, you may also need to reflect this change in other family member's records. To save time having to separately edit individual patient's records, there is a synchronise option to promote the update in other patient's records.

1. Starting from within the Patient Details window, open the edited patient's record.
2. Click **Related**.
3. Define the patient relationship, choosing from either Same Payer, or Same Medicare Card.
4. From the displayed list of related patients, nominate the patient/s to update. Holding down the Ctrl button on your keyboard, highlight the names from the list.
5. Specify what information you want to synchronise, including Address; Home phone; Medicare details; Concession details; and allocated Payer.
6. Click **Synchronise** to confirm the changes.

Tip: To quickly jump between the members of a family, after nominating the relationship, click View Patient from within the Related Patients window to open their record.

Validating Patient Details

In order to communicate with Medicare, MedicalDirector PracSoft establishes a secure link to the Medicare database through a series of digital certificates. Once configured, you can quickly retrieve and/or validate patient details without the requirement of completing paper forms or contacting a representative.

The three ways that allow a practice to validate patient details include the Online Patient Verification (OPV), Online Veterans Verification (OVV) and Online Concession Verification (OCV) checks.

Online Patient Verification (OPV) and Online Veteran Verification (OVV)

The OPV and OVV are processes whereby patient details are checked for eligibility to receive Medicare or DVA benefits before a claim can be submitted using Online Claiming.

Important: The patient check is only valid for the day it is submitted.

To perform the verification checks, the patient has to be first added to the Waiting Room. The process of performing an OPV / OCV and OVV is similar.

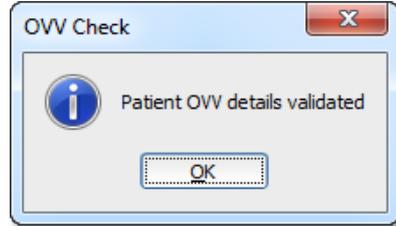
1. Locate and right-click the patient listed in the Waiting Room.

2. Select **OPV** or **OVV Check** from the menu that appears. The patient’s Medicare number or DVA number, and patient details are sent to Medicare via your Internet connection.
3. One of the following possible responses is returned immediately;

(OPV) Patient validated with Medicare



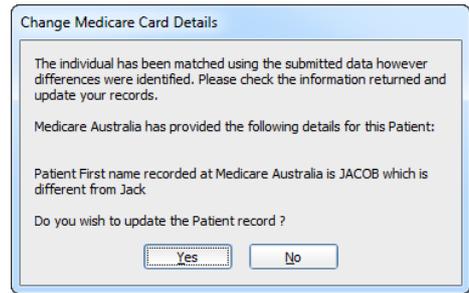
(OVV) Patient validated with Veterans



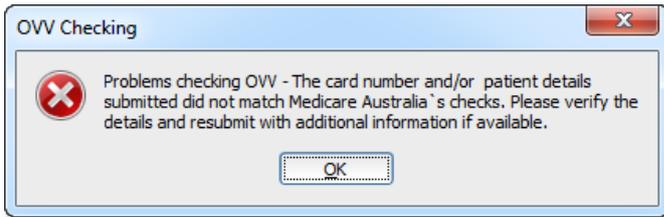
(OPV) Validation failed



(OPV) Patient details require updating



(OVV) Validation failed



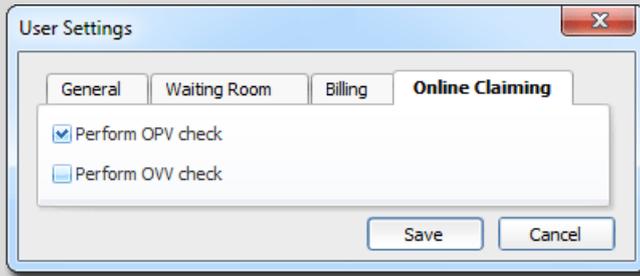
4. Review the results of the OPV and OVV check by looking at the OPV/OVV Status column.

All AT ML										
Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type	Notes	Type	Status	OPV/OVV Status
INGLETON, Haimi		5787 mins	None	AT - Surgery						Failed
RAIN, Jacob		5787 mins	None	ML - Surgery						Successful
LOUNG, Rosa		5787 mins	None	AT - Surgery						Successful

- If the validation returns as 'Failed', review the patient’s details, editing any fields incorrectly recorded.
- If you continue to receive a failed OPV/OVV, ensure that you confirm the details with the patient by asking for more identification. Alternatively, to ensure that the practice is paid for the services performed, private-bill the patient, electing to ask for immediate payment.



Tip: You can automatically perform the OPV or OVV check when recording a patient visit. To configure select **Setup > User Settings > Online Claiming tab**. Tick the **Perform OPV or OVV Check** check box



Online Concession Verification (OCV)

The OCV process is whereby a patient’s concession details are checked against the Medicare database. Verifying the patient has a valid healthcare card, pensioner status, or seniors’ concession card.

Important: *The OCV check is only available when MedicalDirector PracSoft is integrated with a Tyro device.*

To perform the verification check, the patient has to be first added to the Waiting Room. The process of performing an OCV is combined with the OPV check.

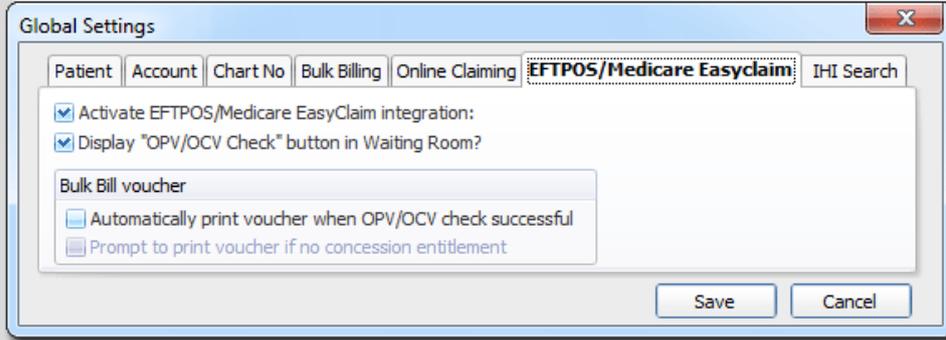
1. Locate and **right-click** the patient name in the Waiting Room.
2. Select **OPV/OCV Check** from the menu that appears. The patient’s Medicare number, patient details and nominated concession details are sent to Medicare via your Internet connection.
3. One of the following possible responses is returned;
 - (OPV/OCV) Details Validated with Concession
 - (OPV/OCV) Details Validated with No Concession



- (OPV) Validation failed



*Tip: For practices using an integrated Tyro device, you can include an OPV/OCV check button in the Waiting Room window. Enable this option via **Setup > Global Settings**. Under the EFTPOS/Medicare Easyclaim tab.*



*Highlight the patient in the Waiting Room and click **OPV/OCV Check**.*

Failure to Verify Patient

If the OPV/OCV/OVV returns stating that the patient’s details submitted cannot be verified, whilst the patient is still within the practice, ask them for additional details including their Medicare card.

1. Review the results of the check by looking at the OPV/OCV/OVV Status column.

Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type	Notes	Type	Status	OPV/OVV Status
INGLETON, Haimi		5787 mins	None	AT - Surgery						Failed
RAIN, Jacob		5787 mins	None	ML - Surgery						Successful
LOUNG, Rosa		5787 mins	None	AT - Surgery						Successful

2. If you have updated the patient’s details, repeat the verification process.
3. If you still receive the failure to verify message, confirm that you have an active network/Internet connection.
4. Next confirm that the Medicare verification system is currently ‘Up’. From the menu, select **Help > Medicare System Status**. Within your internet browser, review the **Online Patient Verification** status.

Medicare Online / ECLIPSE system status

Medicare Australia eBusiness service announcements

There is no service announcement at this time.

Status current at 04/02/2015 02:40:59 PM

System status

[expand all](#) | [collapse all](#)

[\[-\] Medicare system status](#)

Status	Service Name	Status	Service Name	Status	Service Name
▲	ACIR General	▲	ACIR History	▲	ACIR Next Due Date
▲	Bulk Bill Claim	▲	Bulk Bill Processing Report	▲	Bulk Bill Payment Report
▲	Bulk Bill Integrated Report	▲	Patient Claim (Interactive)	▲	Patient Claim Same Day Delete
▲	Patient Claim (Store & Forward)	▲	Online Patient Verification	▲	Enterprise Patient Verification
▲	Status Report Enterprise Patient Verification	▲	Retrieve Report Enterprise Patient Verification	▲	Online Eligibility Check

[\[-\] Department of Veterans' Affairs system status](#)

Status	Service Name	Status	Service Name	Status	Service Name
▲	DVA Claim - Classic	▲	DVA Processing Report	▲	DVA Payment Report
▲	DVA Claim - Paperless	▲	Enterprise Veteran Verification	▲	Online Veteran Verification
▲	DVA In-Hospital Claiming	▲	DVA Allied Health		

5. Still unable to verify the patient’s details, the practice can elect to privately bill the patient. Based on the practice policy you could ask the patient to pay for the consultation upfront or ensure that they pay the full amount as they leave.

Merging Patient Records

Occasionally a situation may occur where duplicate patient records appear in the patient database. This can be due to operator error, change of patient name, or the result of transferring data from other systems. To accommodate for this, MedicalDirector PracSoft provides a method for merging duplicate patient records, together with their visit data.

1. Click **Patient Details View**  button.
2. Within the Patient Details window, enter the name of the patient whose record you wish to keep as the primary; this record will eventually contain the data of the two merged records.
3. Press **Enter** to open the patient's record.

The screenshot shows the 'Patient Details' window for 'Platt Miss Megan'. The patient's date of birth is 30/08/2010, and their status is 'Active'. The payer is 'Platt, Judy'. The Medicare number is 2950 14089 1, which expires on 31/12/2017. The patient's address is 24 Turner Street, ST LEONARDS NSW 2065. The window also displays emergency contact information for 'Platt Mr Greg' and various other medical details like IHI No and Concessions (Bulk Bill).

4. From the menu, select **Patient > Merge Patients**.

The dialog box 'Select Patient to Merge with Platt, M' shows a search filter set to 'Platt, M'. Below the filter is a table of search results:

Name	Chart No	Age	DOB	Address	Medicare	Patient No
Platt, Megan		4yrs	30/08/2010	24 Turner Street, ST LEONARDS. 2065	2950 14089 1	42
Platt, Megan		4yrs	30/08/2010	78 Southbank Drive, ST LEONARDS. 2065	2950 14089 1	43

Note: You are shown a list of names that are similar to that of the first patient you selected. If the name is not listed, you can perform a search of the database to locate the other patient record.

5. Locate and select the patient whose record you wish to merge *into* the first. After the merge, this patient's record will no longer be available.



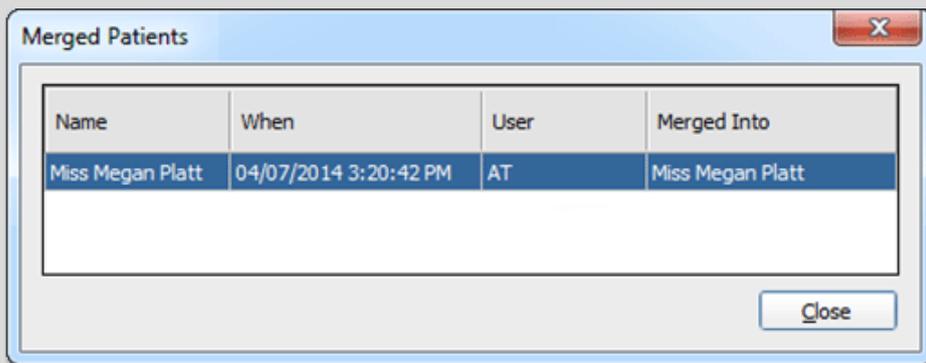
- Click **OK** to merge the records. You will be prompted to confirm this action.



- The merge commences. This may take a few moments, depending on the amount of data within the two records. You will be prompted when the merge has completed. Click **OK**.



Note: MedicalDirector PracSoft maintains a list of merged patient records for future reference. The list is available via **Patient > List of Merged Patients**.



Changing a Patient’s Status

Patients can be flagged with a status of active, visiting, inactive, deceased, or deleted. Patients flagged as deceased or deleted can only be restored to active by using the Patient Reviver tool available within the MedicalDirector Maintenance.

Return Patient to Active (MedicalDirector Clinical)

If an inactive patient record is opened within in MedicalDirector Clinical, and a visit is recorded, the patient’s status is automatically returned to ‘active’. If you need to manually mark a patient record as Active, follow the steps to edit a patient.

Marking Patients Inactive by Last Seen (MedicalDirector Clinical)

Generally, an inactive patient is said to be one that has not presented more than three or more times within the last two years. Within MedicalDirector Clinical you can perform a search for patients who have not been seen since a specified date, and mark them all as inactive.

1. From the menu, select **Search > Patient**. The **Patient Search** window appears.
2. Include in the search criteria, **Not Seen Since**. Specify a date if you wish to search for patients that have not been seen since a particular date, or the search will look for all patients who have never been seen.

3. Click **Search** to start the search.
4. The search result will list all the patients who have not been for consultation since the selected date (e.g. 1/07/2012)
5. Click **Inactivate Patient**. You will be prompted to confirm this action.

Marking a Patient as Deceased

1. Click **Patient Details View**  button.
2. Enter the patient’s name, and press **Enter** key to locate the patient’s record.
3. From the menu, select **Patient > Mark Deceased**. The **Mark a Patient as Deceased** prompt appears.
4. Tick the ‘Deceased’ check box to confirm the patient is deceased, and adjust the deceased date as appropriate.

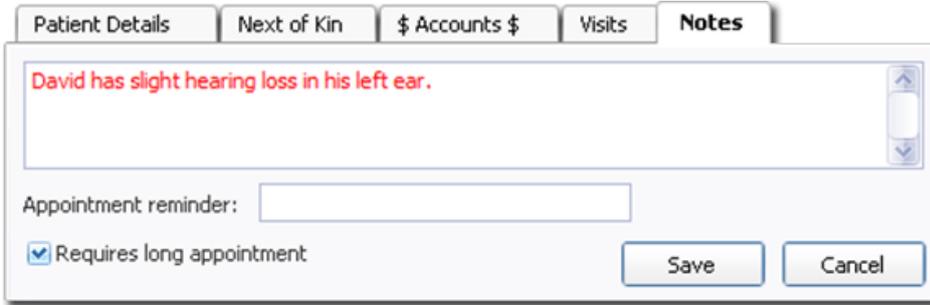
5. Click **Save** to change the patient’s status to deceased. You will be prompted to confirm this action.

Tip: If you require access to a patient’s record that has been marked as deceased, either to review their details or record a receipt payment, when performing a search for them, tick the Include Everybody check box.

Recording Appointment Notes for Patients

MedicalDirector PracSoft enables you to record important notes about a patient in their record. The note appears in the Waiting Room each time you schedule an appointment. For more critical information, you can record an appointment reminder that will appear each time an appointment is made.

1. Click the **Patient Details View**  button.
2. Enter the patient's name, and press the **Enter** key to locate the patient's record.
3. Select the **Notes** tab.

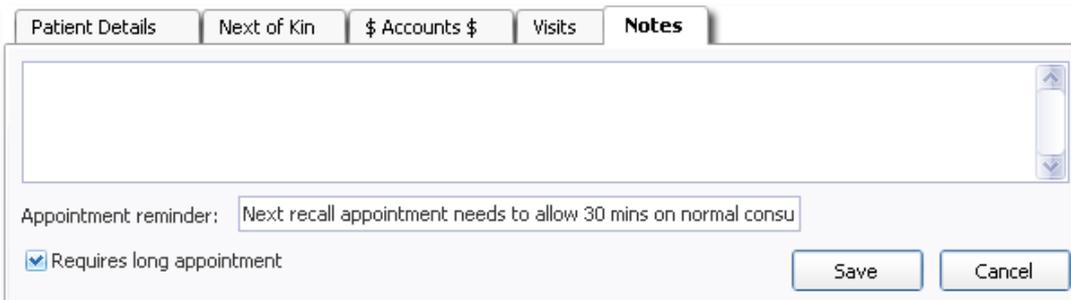


4. In the notes textbox, enter a concise description of the patient's requirements, event/incident, or general information that you need to capture in the patient's record.
5. Click **Save**.
6. The recorded text will display in the Waiting Room notes column

Appointment Reminder

Along with a patient note, record important information in an appointment reminder. Enter the reminder text you wish to display every time a patient makes a booking in the Appointment Book.

1. Click the **Patient Details View**  button.
2. Enter the patient's name, and press the **Enter** key to locate the patient's record.
3. Select the **Notes** tab.

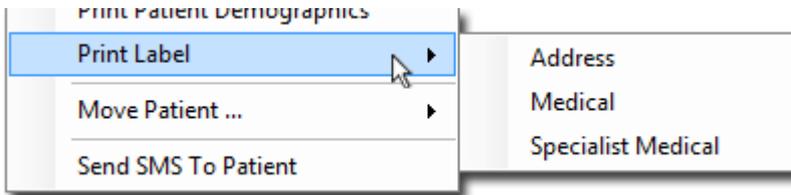


4. Within the **Appointment Reminder** text box, enter a note that will be used to prompt future decisions or actions.
5. Click **Save**.
6. When recording an appointment for the patient, you will be prompted with the appointment reminder text.

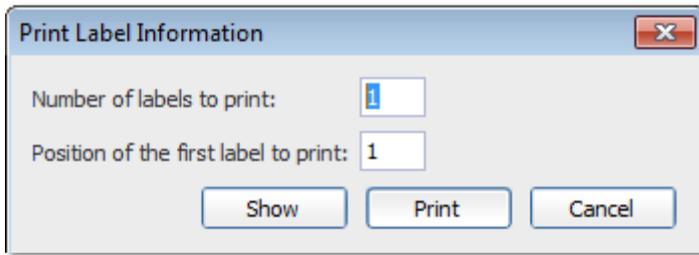
Printing Patient Labels

Select to print a label for a patient currently listed in the Waiting Room.

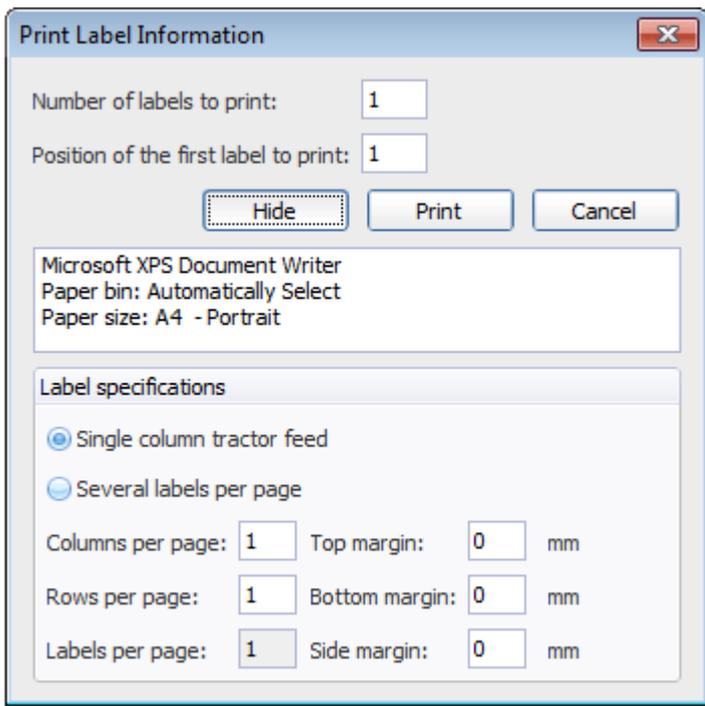
1. Right-click the patient record in the Waiting Room and select **Print Label** from the menu that appears.
2. Choose which patient label you need to print i.e. **Address, Medical, Specialist Medical**



3. Enter the number of labels to print, and the text's relative position on the page



4. Click the **Show** button to view the label settings.



5. Click **Print**.
6. Select your printing preferences, click **Print** again to print the physical label.

eHealth: IHI

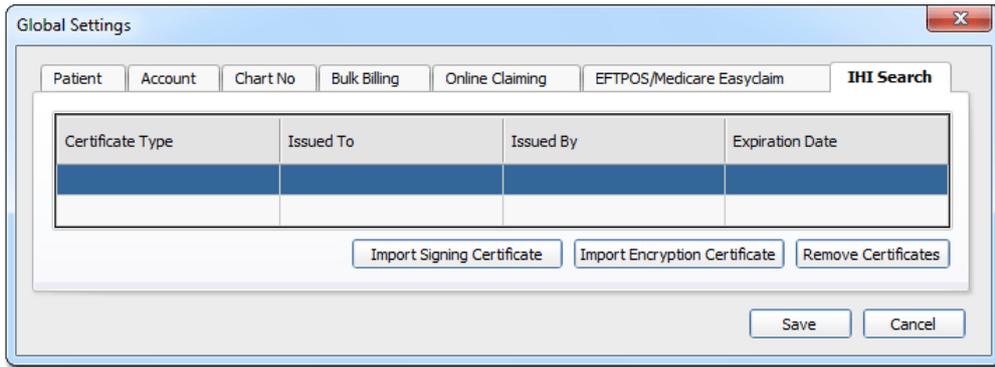
The Individual Healthcare Identifier (IHI) is a unique 16-digit number created by Medicare and assigned to everyone registered with Medicare, and others who require medical assistance.

The IHI number forms part of the Australian Government’s ‘Healthcare Identifier’ initiative in developing a single registry called ‘Personally Controlled Electronic Health Records’ (PCEHR).

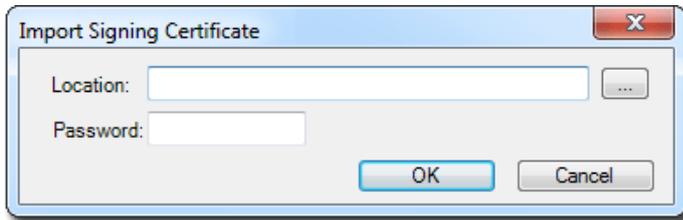
Setup IHI Certificates

To retrieve a patient’s IHI number, you have to first import a Signing and Encryption certificate issued to the practice by Medicare.

1. Select **Setup > Global Settings**. The **Global Settings** window appears.
2. Select the **IHI Search** tab.



3. Click **Import Signing Certificate**. The **Import Signing Certificate** prompt appears.



4. Click **...** to locate and select the certificate file on your computer, click **Open**.
5. Enter the certificate password.



6. Click **OK**.
7. Repeat the steps above to now import the Encryption Certificate.
8. After importing both certificates, click **Save**. You will be prompted to confirm the changes.



Validate IHI No and Status

1. From within the Waiting Room window, perform a search
 - o Click **Search Patient**  button
 - o Press **F2**
2. From the search window, type in the patient's **Surname, First Name**.
3. From the results, select the patient, click **OK**.
4. Within the patient's record, locate the IHI section and click **Validate**. The patient's IHI No, Record Status and No Status will automatically be retrieved.

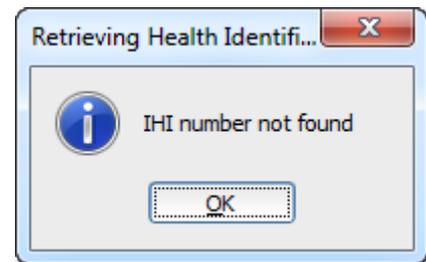
Note: *The minimum amount of information to retrieve a person's IHI number includes: Surname; First name; Date of Birth; Gender; and Medicare Number or DVA Number.*

Tip: *To minimise the length time taken to individually validate patient's IHI numbers. When a practitioner open's the patient's record, the IHI number is automatically validated and displayed on screen.*

IHI Number Not Found

If after pressing Validate you receive a prompt informing you that the IHI number was not found, this is a result of the patient's details being incorrectly recorded in MedicalDirector PracSoft. If you receive this prompt, it may be a result of;

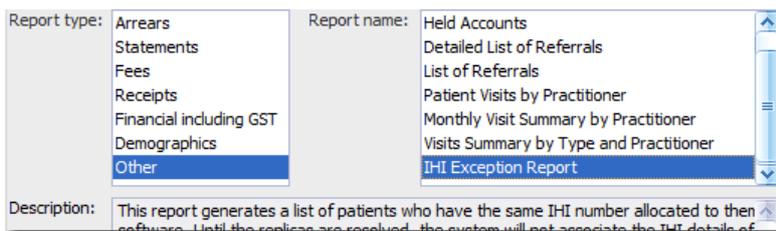
- o The patient details are missing or incorrectly correctly entered. If after checking the details you still receive the same message, you will need to ask for additional identification to verify the patient's identity.
- o The IHI service is currently not available.
- o The patient is already recorded within the MedicalDirector PracSoft database.



IHI Exceptions

To help you locate any potential duplicate patients within the database, generate an IHI Exception Report; it lists all the patients that have been issued the same IHI number, and subsequently have been flagged as a duplicate entry.

1. Open the Reports module from the menu, select **Reports > All Reports**
2. Select the Report Type of **Other**, and then scroll down the list of available reports to the **IHI Exception Report**.



3. The report will display a list of all the duplicate patients found in the database based on their IHI number.

Appointment Book

The Appointment Book module is a digital diary, designed to assist your practice capture future appointments for both existing and new patients.

Configure Appointment Book

Layout

The layout of the Appointment Book can be quickly tailored to reflect your practice’s booking workflow. If you have a large practice you may choose to view all practitioners’ appointments for a single day. Alternatively, for a single-practitioner practice, you may want to see all appointments over a week period.

Daily View: Multiple Practitioners’ schedules, displayed side by side.

Time	AT - Surgery [Dr. A Terri-Anne]	ML - Surgery [Dr. M Lennard]
9:00 AM	ZANBUCK,Jodie, 456 7898, 19/06/1988	
:15	STRUTHERS,Dalton K, 29/02/1984	
:30	WATLAND,Henry S, 29/02/1972	
:45	SCHEIN,Carolina K, 29/02/1972	
10:00 AM	ANDREWS,Graham, 9123 4567, 22/07/1999	
:15	LOLLIE,Ollie, , , 12/05/1979	
:30	LOLA,Elisabeth, , , 15/06/1959	
:45		
11:00 AM		KINDRA,Noah, , , 09/09/1993
:15		PRUE,Yerda, , , 23/09/1943
:30		BABEL,Todd, 9123 4567, 08/02/2000
:45		ELISE,Diana, , , 05/07/1950
12:00 PM	** RESERVED **	⊗ Thompson, Sam (0432 783 782)
:15	PITT,Lucy, 14/11/2008	SPENCER,Gilana, 11/11/1981
:30	INGLETON,Haimi, 12/12/1993	
:45		** RESERVED **
1:00 PM	DONNELLY,George, 234 6789, 02/07/1922	
:15	ANDREWS,Melissa, 123 7874, 19/01/1993	
:30	SMITH,Fred, 9123 4567, , 23/08/1998	
:45		
2:00 PM	LOUNG,Zara, , , 13/12/1990	
:15	LOUNG,Daniel, , , 14/12/2002	LAWSON,Luke, , , 12/12/1970
:30		VINCE,Edwin, , , 12/01/1956
:45	⊗ Peters, Greg (0421 782 322)	
3:00 PM		SEPPO,Cherry, , , 03/07/1972
:15		
:30		ELISE,Diana, , , 05/07/1950
:45		
4:00 PM		
:15		LOU,Roahelle, , , 04/05/1994
:30		
:45		

Weekly View: Single Practitioners diary, displaying a week of appointments

Time	Tue 06/01/15	Wed 02/07/14	Thu 08/01/15	Fri 09/01/15	SSat 10/01/15	Sun 11/01/15	Mon 12/01/15
9:00 AM				ELISE,Diana, , , 05/07/1950			LOLA,Elisabeth, , , 15
:15				COLINS,Ruby, , , 15/11/197			
:30							JULIUS,Miriam, 03 87
:45				RAIN,Jacob, , , 02/02/1955			
10:00 AM				RAIN,Ruby, 12/08/2010	WATLAND,Henry S, 29/02/		
:15				ATHOL,Daphne, 04114587	BLANTON,Lindsay, 03 8745		
:30					PRUE,Yerda, , , 23/09/1943		
:45							
11:00 AM	KINDRA,Noah, , , 09/09/19	LUCAS,Christine, , , 05/10/			JAMES,Barry, , , 04/04/199		
:15	PRUE,Yerda, , , 23/09/1943	KINDRA,Noah, , , 09/09/19		PRUE,Yerda, , , 23/09/1943			
:30	BABEL,Todd, 9123 4567, 0	PRUE,Yerda, , , 23/09/1943					
:45	ELISE,Diana, , , 05/07/1950	BAKER,Stephen, 02/05/195					
12:00 PM	Thompson, Sam (0432)						
:15	SPENCER,Gilana, 11/11/196						
:30		ANDERSON,Penny, 1234 56					
:45	** RESERVED **	** RESERVED **			** RESERVED **		
1:00 PM				** RESERVED **			** RESERVED **
:15				DURANT,Greg J, , , 16/02/1			
:30							
:45				WOETH,Tim, , , 10/06/1950			PRUE,Yerda, , , 23/09
2:00 PM							
:15	LAWSON,Luke, , , 12/12/19						
:30	VINCE,Edwin, , , 12/01/195			GABRIEL,Jennifer, , , 03/06			
:45				ANDREWS,Anna, 9123 4567			
3:00 PM	SEPP0,Cherry, , , 03/07/197						
:15							
:30	ELISE,Diana, , , 05/07/1950	NORMAN,Ibrahim, , , 01/08					
:45		BABEL,Todd, 9123 4567, 0					
4:00 PM							
:15	LOU,Roahelle, , , 04/05/195			DONNELLY,George, 234 67			
:30				NERK,Fred, 4567 8900, 030			
:45							

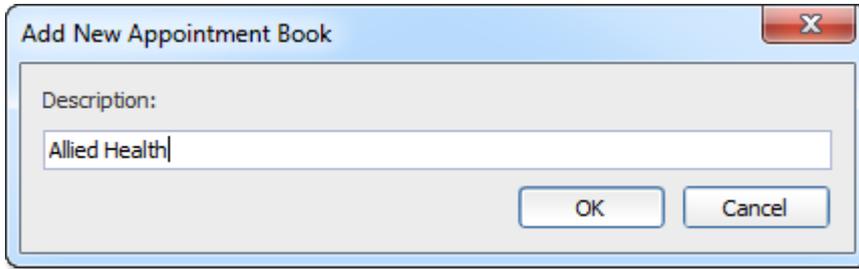
Create an Appointment Book

Based on your practice's requirements, you can choose to use the provided Appointment Book called 'Undefined'. Alternatively for larger practices, create additional Appointment Books if your practice provides a variety of services and you want to separate these areas with their own booking system.

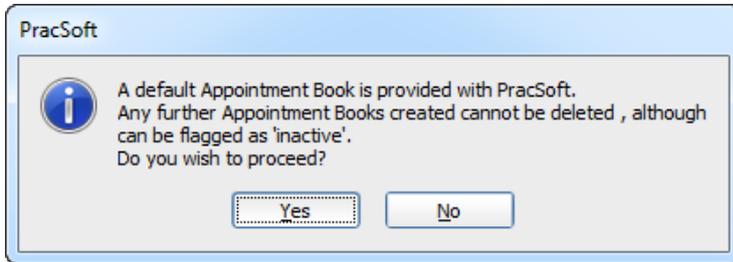
Tip: If the services provided at your practice have different opening times or require different standard consultation times (e.g. 10mins / 15mins / 20mins), you can create multiple Appointment Books with different time configurations.

Warning: Once you have added an Appointment Book, you cannot delete it - you can only remove it from your list by making it inactive. It is therefore important that you assess your requirements before creating Appointment Books.

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. Select **Setup > Manage Appointment Books**. The **Manage Appointment Books** window appears.
3. Click **Add**. The **Add New Appointment Book** prompt appears.
4. Insert a name for the new Appointment Book, and then click **OK**.



5. Confirm that you **REALLY** want to create the Appointment Book; click **Yes** to proceed.



6. You will be returned to the Manage Appointment Books window. Click **Close**.
7. On the Appointment screen, select the Appointment Book you want to view from the drop down list



8. Complete the steps outlined below to finish the setup by adding practitioner/s to the Appointment Book.

Adding Practitioners to the Appointment Book

The Appointment Book has its own built-in list of practitioners that differs to the list of Registered Practitioners within your MedicalDirector PracSoft database (i.e. Waiting Room). Before you can start scheduling appointments for a practitioner, you must first add them to the appropriate Appointment Book.

MedicalDirector PracSoft does not automatically populate the Appointment Book with practitioners. The two methods for adding practitioners to the Appointment Book are;

- By manually adding a practitioner to the list of practitioners available to the Appointments module
- By synchronising the Appointments module with the MedicalDirector PracSoft database.

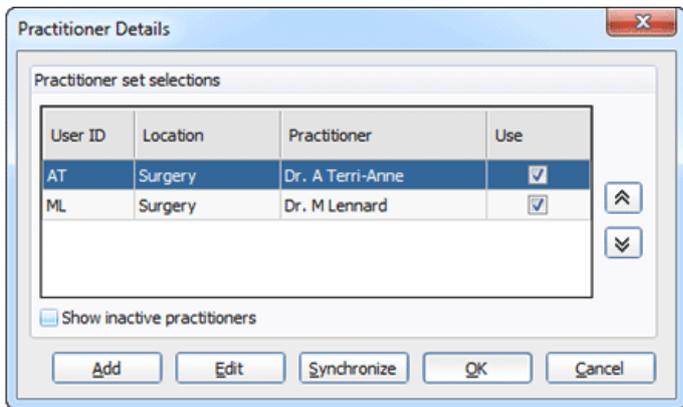
Synchronising Practitioners in the Appointment Book

The *synchronise* method copies all registered practitioners from the MedicalDirector PracSoft database, linking them to the opened Appointment Book. This method ensures that all newly-added Registered Practitioners can have appointments recorded. Note, the synchronisation is one-way; practitioners are copied from the MedicalDirector PracSoft database (i.e. Waiting Room) and copied to the Appointment Book, but not vice-versa.

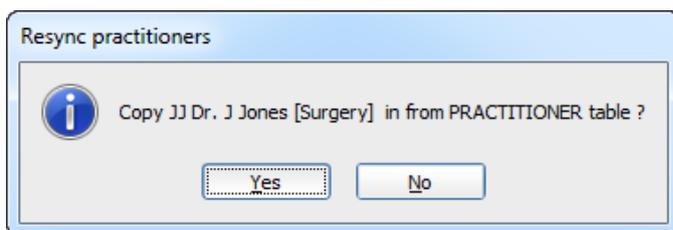
Note: If you manually create a practitioner and do not synchronise them, MedicalDirector PracSoft may not automatically find a matching practitioner in the database (which it will attempt to do). If no link is established, the patients you appoint to these practitioners will not be visible in the Waiting Room.

Tip: It is highly recommended that if you create a practitioner manually and if you wish to use them within MedicalDirector PracSoft (not just the Appointment module), that you also add them to the Registered Practitioner list, and then perform a synchronisation to link the two profiles.

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. Select **Setup > Practitioners**. The Practitioner Details window appears.



3. Click **Synchronize**. If there are any registered practitioners in MedicalDirector PracSoft that are not currently available to the Appointment Book, you will be prompted to add them, as shown below.

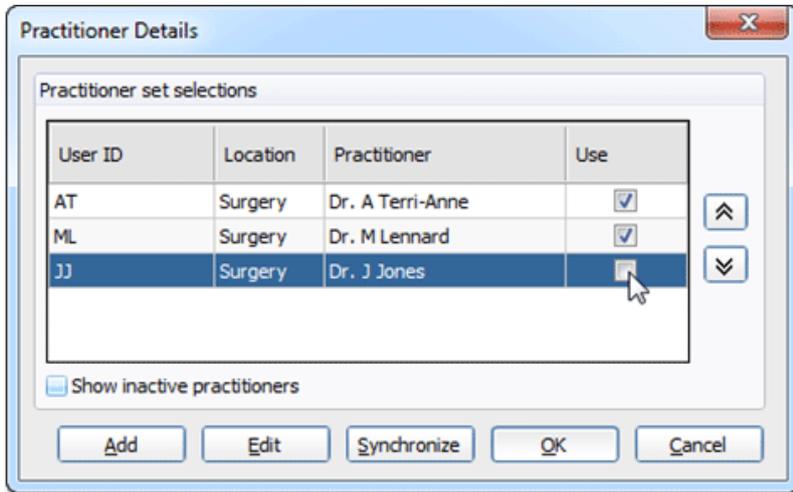


Important: If you originally created a practitioner in the Appointments module first, and then added them to MedicalDirector PracSoft itself, and are now trying to synchronise the two records, you should NOT be prompted to add them, as shown above. This is because MedicalDirector PracSoft should see that the two records are identical, and automatically synchronise them when you click Sync.

If you do in fact get prompted to copy a practitioner from MedicalDirector PracSoft to the Appointments module when they are already in the Appointments module, this suggests that MedicalDirector PracSoft thinks they are two different records. This is usually because the Practitioner Code and Location information you entered for these records is somehow different.

In this case, click No to ignore the prompt request. Then, go back and check that the Practitioner Code and Location information for this practitioner in the Appointments module is identical to that recorded in MedicalDirector PracSoft. If there is even a slight difference, you must edit this information via the Appointments module (a Practitioner's information cannot be altered in MedicalDirector PracSoft once it has been entered). Then, try to synchronise again - this time you should not be prompted to copy them from MedicalDirector PracSoft.

4. You will be returned to the Practitioner Details window, where you will now be able to see all the new practitioners you brought over from MedicalDirector PracSoft to the Appointments Book.
5. To ensure these practitioners are visible to the Appointment Book, tick the **Use** check box.

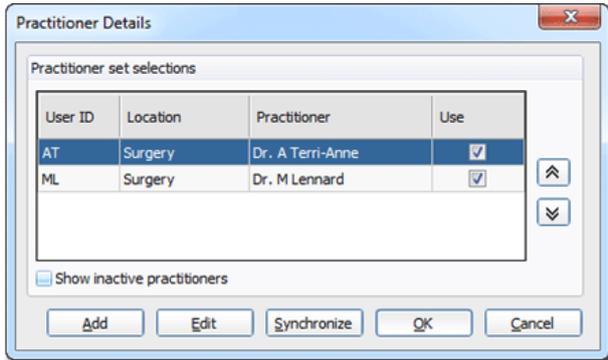


6. Click **OK** to close this window.



Adding Non Billing Practitioners to the Appointment Book

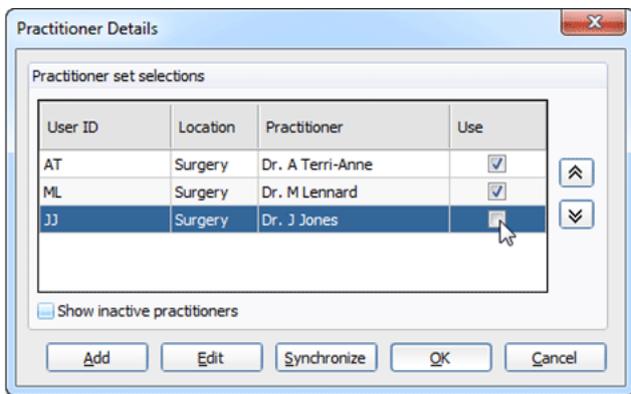
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. Select **Setup > Practitioners**. The **Practitioner Details** window appears.



3. Click **Add**. The **Add Practitioner** window appears.



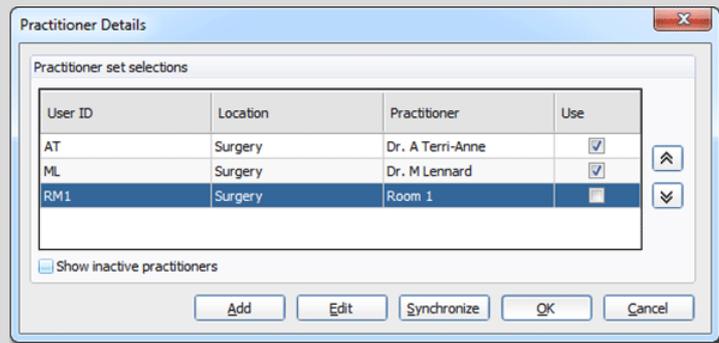
4. Enter up to 4 characters into the Practitioner Code text box. This code (usually the person’s initials) is utilised throughout MedicalDirector PracSoft to identify Users. Each Practitioner code must be unique. Later, if you intend for the person to login to MedicalDirector PracSoft, you must use this same code.
5. Enter a location in the associated text box. Later, if you intend to add this practitioner to MedicalDirector PracSoft to record billing, you must use this same location description.
6. Enter the Practitioner's name into the associated text box. Later, if you intend to add this practitioner to MedicalDirector PracSoft itself, you must enter their name exactly as it appears here.
7. Click **Save** to confirm their details. The practitioner is added to the list of those available to the Appointments module.
8. To ensure this practitioner is visible to the Appointment Book, tick their **Use** check box.



9. Click **OK** to close this window.

Tip: Once a practitioner is added to your Appointment Book, you can remove their calendar from your screen, un-tick the Use check box.

Tip: You can add a non-billing practitioner within the Appointment Book. Options could include appointments for Nurses, Allied Health Workers, or manage a Room. As this 'practitioner' is not recorded within the Registered Practitioners, you cannot transfer the patient to the Waiting Room.



Appointment Book Preferences

Included in the setup of MedicalDirector PracSoft you can configure the appointment book/s to match your practice requirements. The preferences options include: specify the appointment schedule, allowing you to select the first and last time slots for the practice; how many appointments per hour; what patient identifying information is to be displayed on the appointment book; and determine the settings per workstation.

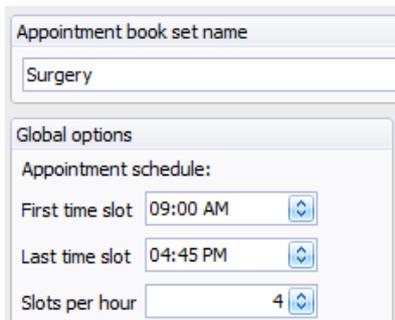
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



3. From the menu, select **Setup > Options**.

Practice Hours / Sessions per Hour

4. Rename the Appointment book to clearly identify the practice location. As an option include a reference to the time schedule.
5. Within the **Global Options** section, select the first and last appointment time slots, and specify how many appointments occur per hour.



Tip: For practices where practitioners require a different time scale for appointments, consider creating a separate Appointment Book with a different allocation of slots per hour (e.g. one based on 10 minutes, another on 15 minutes).



Patient Reference Information

6. Within the **Global Options** section, choose what information you want to display on the appointment book.

Display options for appointments:

- Use known as
- Chart number
- Phone number
- Mobile number
- Address
- Date of birth
- Double-space reports

7. After saving and restarting the appointment book, all patient appointments going forward will display the nominated values.

10:00 AM	ANDREWS,Anna, 9123 4567, , 2 Kennedy Rd,Darwin,0800, 08/12/1998
----------	---

Tip: If you are unable to reference all the patient details displayed in the column, click on the appointment to see the patient information displayed in the bottom left hand corner of the appointment book window.

AT @ 10:00 AM	ANDREWS,Anna, 9123 4567, , 2 Kennedy Rd,Darwin,0800, 08/12/1998
---------------	---

Workstation Options

8. Within the **Workstation Options** section, nominate how that computer will interact with the appointment book.

Workstation options

- Open patient in Medical Director when 'In consultation'
- Account details
- Warn when entering into RESERVED entries or NON-SESSION times
- Require comment for delete
- Allow auto-delete RESERVED entries

Refresh interval seconds

9. Click **Save** to record any adjustments.

10. From the prompt, close the appointment book. Reopen it again for the changes to take effect.

Practitioner Availability

Standard Session

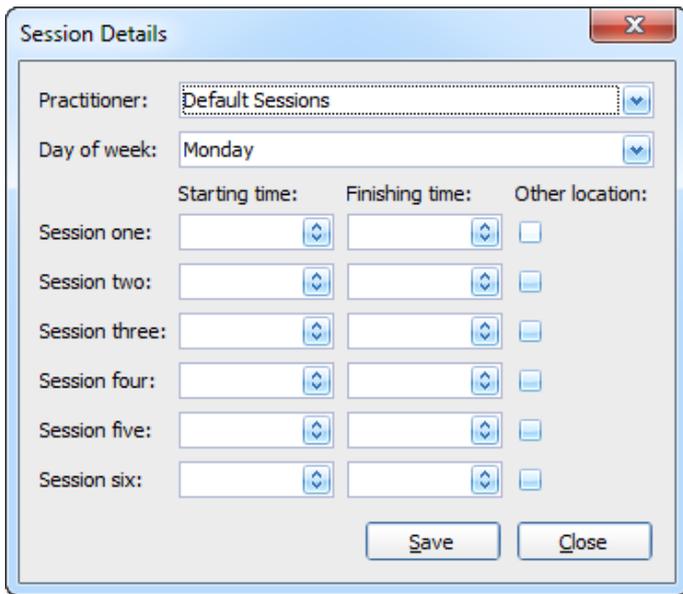
A standard appointment session is the 'normal' session hours that a practitioner is available to take appointments. Standard sessions can further be divided into two groups;

- o 'Default' sessions: the default for the entire Appointment Book. Default sessions always override practitioner-specific sessions.
- o 'Practitioner-specific' sessions: these are the sessions that each practitioner will be available to take appointments. Practitioner-specific sessions will always be overridden by 'default' sessions.

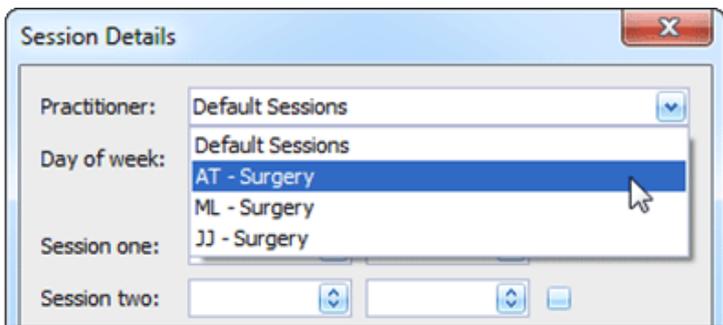
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



3. Select **Setup > Availability > Standard Sessions**. The **Session Details** window appears.

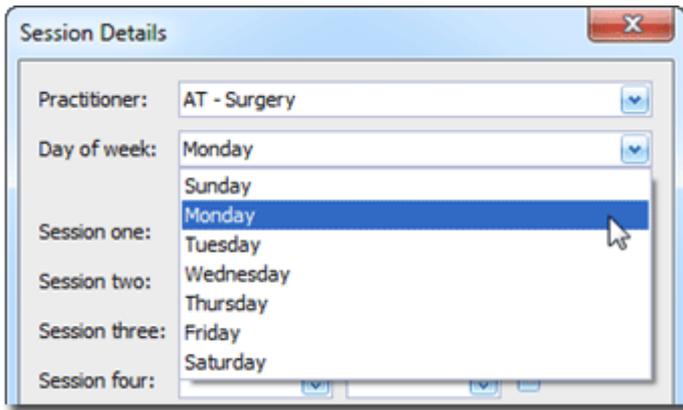


4. Select an individual's Practitioner's name from the drop-down list to personalise their availability.

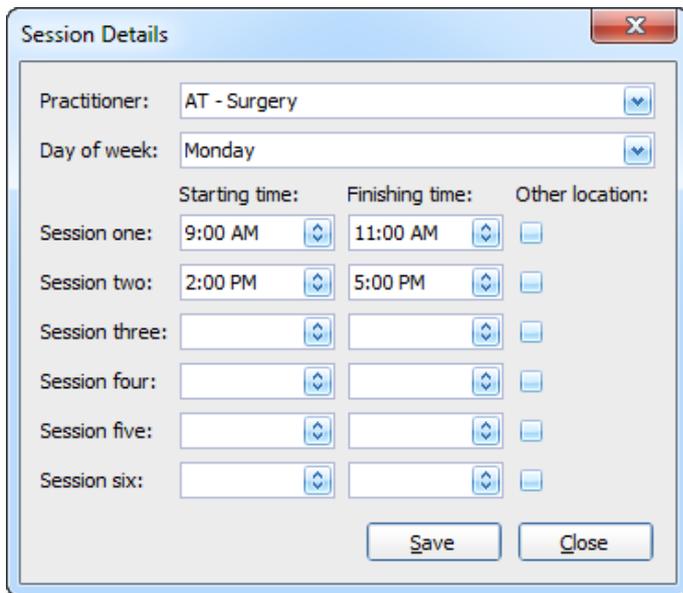




- Select the day of the week to define the session’s availabilities.



- For each day the practitioner is available, enter the sessions time including the start and finish time



Tip: To differentiate AM from PM, enter the times in 24hr format. Record incremental changes to time using the UP and Down arrows on your keyboard. When recording the time, quickly enter the values; any delay in pressing the keys overrides the previous entry.

Optional: Tick the ‘Other Location’ check box to indicate that for a given session, appointments will be consulted at a site other than the normal practice. This option can be used to show when a practitioner is available to conduct home visits.

- When you have completed the session times for a practitioner and Day of Week, click **Save**.
- Repeat steps 4 through 7 for each Day of the Week the practitioner works. Including the hours the Practitioner is available to take appointments.
- Click **Close** to return to the Appointment Book.

Special Sessions

Special appointment sessions (referred to as temporary sessions) break the regular pattern the practitioner works, indicating their adjusted availability on a specific day or date range.

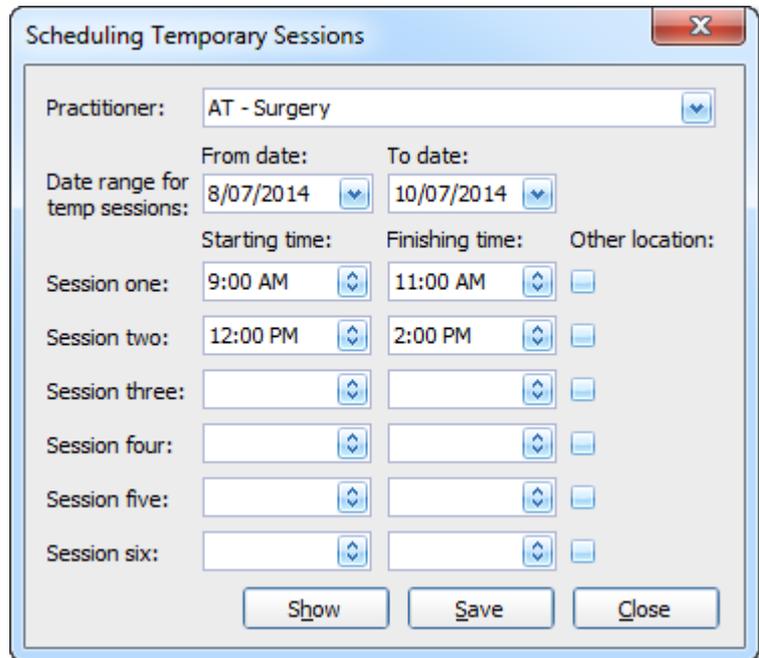
Note: A Practitioner's special sessions override their standard sessions. If the practitioner decides to work extra hours as a one-off event, you will need to recreate the whole of the Practitioner's availability for that day. This includes adding in the normal hours worked, in addition to the extended hours as special sessions.

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



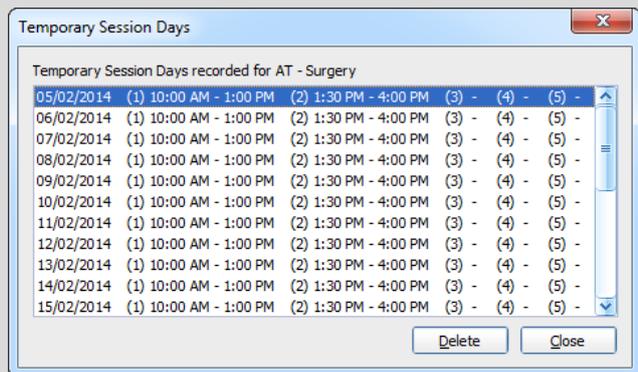
3. From the menu, select **Setup > Availability > Special Sessions**. The **Scheduling Temporary Sessions** window appears.
4. Select the Practitioner you want to create a temporary session plan for.
5. Select the date range for the temporary session.
6. For each session the practitioner is available, enter the new start and finish times.

Optional: Tick the **Other Location** check box to indicate that for a given session, appointments will be consulted at a site other than the normal practice. This option can be used to show when a practitioner is available to conduct home visits.



7. Click **Save** to confirm the changes of Practitioner's availability.

Tip: After adjusting their schedule, click Show to review all the temporary availability changes made. If a date was incorrectly recorded, or a day listed you do not want to override, select the day and click Delete to remove the change. In deleting the temporary schedule, the practitioner will maintain their standard session availability.



Tip: If the practitioner works extended hours on an alternating repeating schedule (i.e. fortnightly), you can as an option establish the normal week pattern by using the Standard session. Specify the adjusted hour, nominating a large date ranges as shown above. Click Show to display the scheduled changes, then using the Ctrl or Shift button highlight the days to delete, returning them back to the standard pattern.

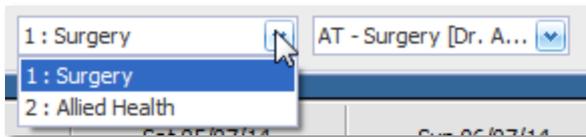
Alternatively to reduce availability use a repeating non-patient appointment to block out selected time or a day.

8. Repeat steps 4 through 7 for each Day of the Week the Practitioner works, including the hours the Practitioner is available to take appointments.
9. Click **Close** to return to the Appointment Book.

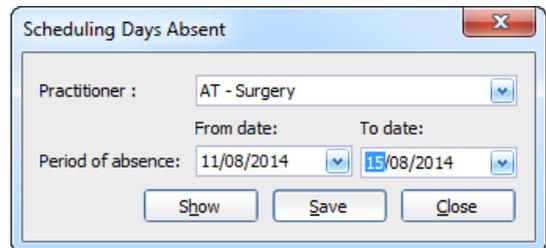
Record Days Absent

In the Appointment Book, you can indicate the days a practitioner will be absent. Absent days are considered a type of Appointment Session.

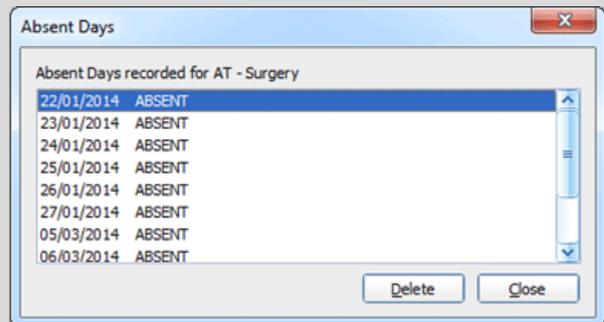
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



3. From the menu, select **Setup > Availability > Days Absent**. The **Scheduling Days Absent** prompt appears.
4. Select the Practitioner who is absent today or recording absence for future leave.
5. Select the date range for the days absent.
6. Click **Save** to confirm the changes of Practitioner’s absence.



Tip: When recording an absence, click Show to review all the days the Practitioner has been recorded as absent. If a date was incorrectly recorded or a day listed you do not want to mark as absent, select the day and click Delete to remove the change. In deleting the absent day, the practitioner will maintain their standard session availability.



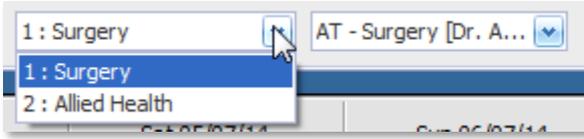
7. Click **Close** to return to the Appointment Book.

Note: The days recorded as absent will be marked as unavailable in the Appointment Book. Any existing appointments booked for this day will now need to be rescheduled to another available time or assigned to another practitioner.

Adding an Appointment

Recording an Appointment – Existing Patient

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to use.



3. Select the practitioner either using the Practitioner’s column (day view) or drop-down list (weekly view).
4. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.



5. Confirm the patient’s preferred time (Morning, Midday, Afternoon, Evening)
6. Based on the requested date and time period, confirm if the patient’s regular Practitioner has an available timeslot. If available click the available timeslot to record the booking

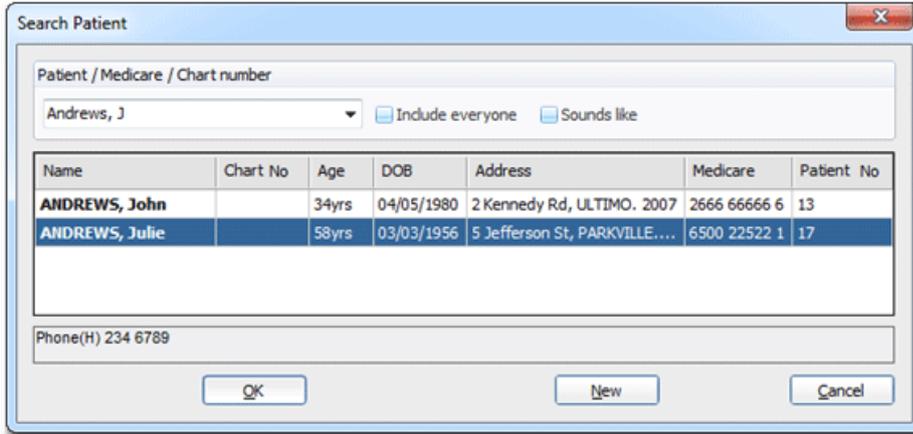
:45		
11:00 AM	KINDRA,Noah, , , 09/09/1	LUC
:15	PRUE,Yerda, , , 23/09/194	KIND
:30	BABEL,Todd, 9123 4567,	PRUE
:45	ELISE,Diana, , , 05/07/195	BAKI
12:00 PM	⊗ Thompson, Sam	
:15	SPENCER,Gilana, 11/11/1	
▶ :30		AND
:45	**RESERVED**	
1:00 PM		
:15		
:30		
:45		
2:00 PM		
:15	LAWSON,Luke, , , 12/12/1	

Tip: If the practitioner is not available at the requested time or date, locate the next available timeslot. Scan down the day or week to visually check or right-click the calendar, select Find Next Unbooked Appointment (Shift F5). Specify the search criteria to locate the next available timeslot. Press Search to jump to the next timeslot. If the timeslot is not suitable, to repeat the search press Shift F2.

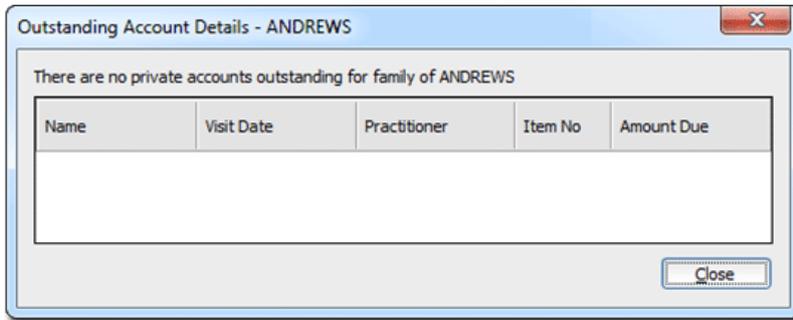


7. Once an appointment date and time has been confirmed, enter the patient’s **Surname, First name** in the available timeslot.

- Press **Enter**. If there is more than one patient with the same name, select the correct one by using address or date of birth. Once located, click **OK**.



- Any appointment notes will display as a prompt, including the option to flag that this patient requires a long appointment.
- The patient's Outstanding Account Details will be displayed. If appropriate, inform the patient if any money is outstanding from previous visits.



- The patient booking is displayed in the Practitioner's appointments with Black text

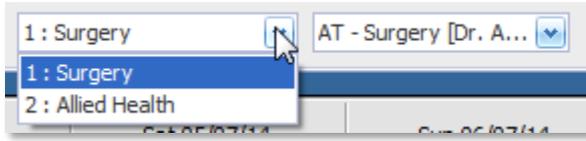
:45		
11:00 AM	KINDRA,Noah, , 09/09/19	LUC
:15	PRUE,Yerda, , 23/09/1943	KIND
:30	BABEL,Todd, 9123 4567, 0	PRU
:45	ELISE,Diana, , 05/07/1950	BAK
12:00 PM	⊗ Thompson, Sam	
:15	SPENCER,Gilana, 11/11/19	
▶ :30	ANDREWS,Julie, 234 6789,	AND
:45	**RESERVED**	
1:00 PM		
:15		
:30		
:45		
2:00 PM		
:15	LAWSON,Luke, , 12/12/19	

Tip: To assist you in identifying patients, you can customise which details are displayed beside the patient's name. From the Appointment Book, select Setup > Options. Indicate which information you want displayed in the Appointment Book.

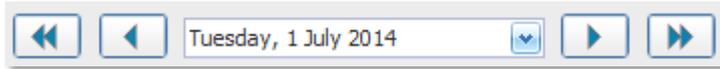


Recording an Appointment – New Patient

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to use.



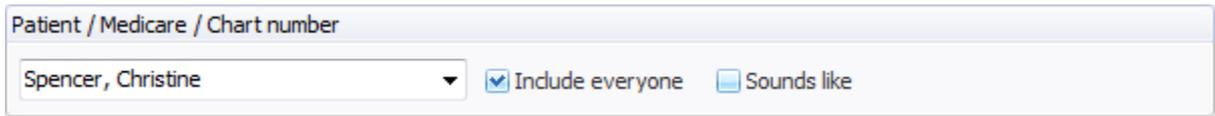
3. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.



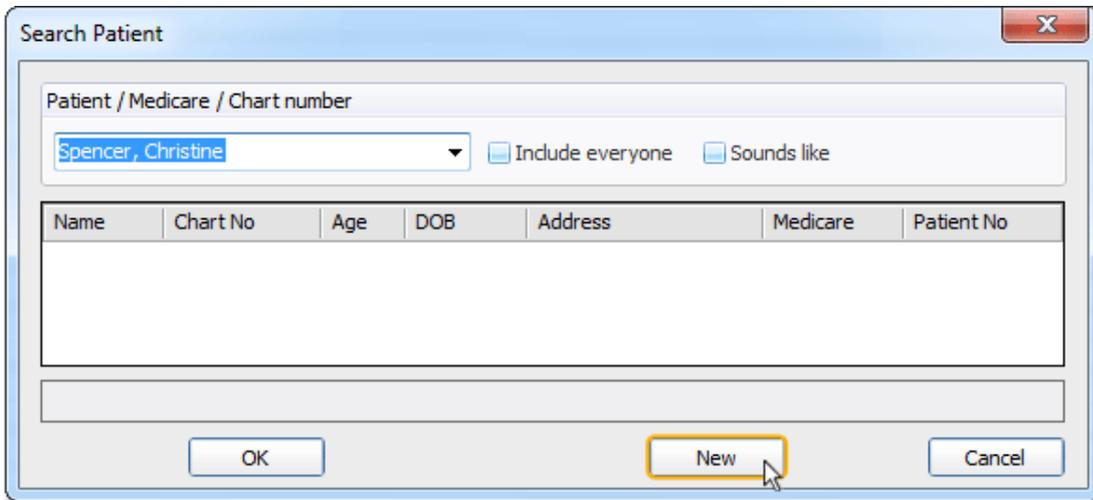
4. Confirm the patient’s preferred time (Morning, Midday, Afternoon, Evening).
5. Based on the requested date and time period, click a time slot in the date/time calendar in which to schedule an appointment.
6. Enter the patient’s Surname, (including comma), First name (or part of).
7. Press **Enter** to confirm your entry.

1:00	ANDREWS, JUNE, 23/07/09, AND
:45	** RESERVED **
1:00 PM	
:15	
:30	
:45	
2:00 PM	Spencer, Christine
:15	LAWSON, Luke, , , 12/12/19
:30	VINCE, Edwin, , , 12/01/195 AND
:45	
3:00 PM	
:15	SEPPO, Cherry, , , 03/07/19; NOR

8. Perform a quick search through your patient database, tick **Include Everyone** to confirm that the person has not previously presented or their not a contact for another patient.



9. If you are unable to locate the patient from the search result, click **New**.



10. The patient's name now appears in the selected time slot, and their appointment has been scheduled. To distinguish a new patient not recorded in the database, the appointment is flagged with a red cross 

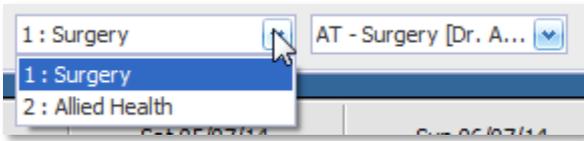
:30	ANDREWS,Julie, 234 5789, AND
:45	** RESERVED **
1:00 PM	
:15	
:30	
:45	
▶ 2:00 PM	 Spencer, Christine
:15	LAWSON,Luke,, , 12/12/19
:30	VINCE,Edwin,, , 12/01/195 AND
:45	
3:00 PM	
:15	SEPPO,Cherry,, , 03/07/19; NOR

Tip: As the patient's details are not yet recorded in MedicalDirector PracSoft, add their phone number to the booking in the case you need to contact them. Type any additional information directly after their name.

▶ 2:00 PM	Spencer, Christine 0421 345 125
:15	LAWSON,Luke,, , 12/12/1970

Recording a Long Appointment

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to use.



3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).
4. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.



5. Confirm the patient's preferred time (Morning, Midday, Afternoon, Evening).
6. Based on the requested date and time period, confirm if the patient's regular practitioner has an available timeslot for an extended appointment. If available: Left-click and drag down to highlight multiple time slots.

:45	
11:00 AM	LUCAS,Christine,, , 05/10/1
:15	KINDRA,Noah,, , 09/09/19
:30	PRUE,Yerda,, , 23/09/1943
:45	BAKER,Stephen, 02/05/195
12:00 PM	
▶ :15	
:30	ANDERSON,Penny, 1234 56
:45	** RESERVED **
1:00 PM	

- Once an appointment date and time has been confirmed, type the patient's 'Surname, First name' in the timeslot

:45	
11:00 AM	LUCAS,Christine, ,, 05/10/19
:15	KINDRA,Noah, ,, 09/09/199
:30	PRUE,Yerda, ,, 23/09/1943
:45	BAKER,Stephen, 02/05/195
12:00 PM	
:15	Andrews, J]
:30	ANDERSON,Penny, 1234 56
:45	** RESERVED **
1:00 PM	

- Press **Enter**. If there is more than one patient with the same name, you will be prompted to select the correct one by using date of birth or address. Once located, click **OK**.

Search Patient X

Patient / Medicare / Chart number

Andrews, J Include everyone Sounds like

Name	Chart No	Age	DOB	Address	Medicare	Patient No
ANDREWS, Jennifer		44yrs	20/04/1970	34A Spencer Street, RYDE. ...	3500 26512 1	31
ANDREWS, John		34yrs	04/05/1980	2 Kennedy Road, ULTIMO. ...	2666 66666 6	36
ANDREWS, Julie		58yrs	03/03/1956	5 Jefferson St, PARKVILLE. ...	6500 22522 1	17

Phone(H) 02 91234567 ** Long appointments required **

- The Appointment Notes window will display any information recorded from the last visit or confirm that this patient requires long appointments.

Appointment Notes X

Details

Patient:
Mr JohnANDREWS

Notes:
Next recall appointment needs to allow 30 mins on normal consult

This patient requires long appointments.

10. The patient's Outstanding Account Details will be displayed. If appropriate, inform the patient if any money is outstanding from previous visits. Click **Close** to continue.

Name	Visit Date	Practitioner	Item No	Amount Due
John	9/03/2013	AT	23	\$53.40
John	9/03/2013	AT	30074	\$115.35
John	5/05/2014	AT	23	\$53.40
			Total	\$222.15

11. The patient's booking is displayed as a block that extends the duration you specified.

:45	
11:00 AM	LUCAS,Christine, , , 05/10/19
:15	KINDRA,Noah, , , 09/09/19
:30	PRUE,Yerda, , , 23/09/1943
:45	BAKER,Stephen, 02/05/195
12:00 PM	ANDREWS,John, 9123 4567
:15	
:30	ANDERSON,Penny, 1234 56
:45	** RESERVED **
1:00 PM	

Tip for patients that require additional time due to chronic health conditions:
Within the patient's record, flag that they require a long appointment. At the time of the booking, confirm with the patient if a long appointment is required.

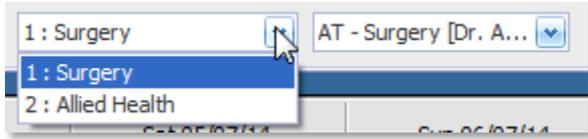
Tip: If you select a one-timeslot appointment and nominate the patient only to find you receive a long appointment reminder, instead of cancelling and having to start again, see if there is a free timeslot still available - you can extend the appointment by recording another appointment next to the original.
The two appointments will be combined to become a long appointment.

:45	
11:00 AM	LUCAS,Christine, , , 05/10/19
:15	KINDRA,Noah, , , 09/09/19
:30	PRUE,Yerda, , , 23/09/1943
:45	BAKER,Stephen, 02/05/195
12:00 PM	ANDREWS,John, 9123 4567
:15	Andrews, John
:30	ANDERSON,Penny, 1234 56
:45	** RESERVED **
1:00 PM	

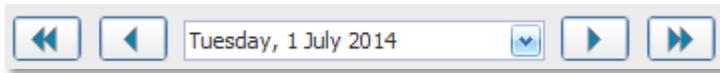
Making a 'Fit' Appointment

A 'fit' appointment (known as double-booking) is one that is scheduled to fit between two standard pre-booked appointment slots. A fit appointment may be required if for example a patient arrives unannounced and needs urgent attention.

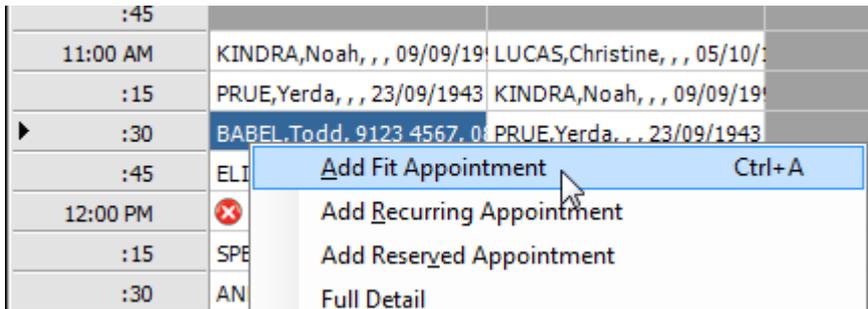
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



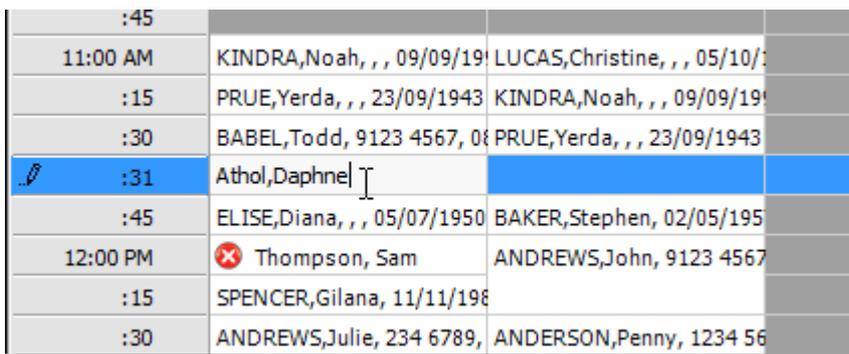
3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).
4. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.



5. Right-click the timeslot prior to the scheduled fill-in appointment and select **Add Fit Appointment**.



6. In the new appointment time slot, enter the patient's **Surname, First name**.



Note: Fit appointments are always scheduled for one minute after the last standard appointment.

7. Press **Enter**. If there is more than one patient with the same name, you will be prompted to select the correct one by using date of birth or address. Once located, click **OK**.
8. The patient's Outstanding Account Details will be displayed. If appropriate inform the patient if any money is outstanding from previous visits. Click **Close** to continue.



9. The 'fit' appointment is indicated by highlighting the appointment time in blue.

:45			
11:00 AM	KINDRA,Noah, , , 09/09/19	LUCAS,Christine, , , 05/10/	
:15	PRUE,Yerda, , , 23/09/1943	KINDRA,Noah, , , 09/09/19	
:30	BABEL,Todd, 9123 4567, 0	PRUE,Yerda, , , 23/09/1943	
▶ :31	ATHOL,Daphne, 04114587		
:45	ELISE,Diana, , , 05/07/1950	BAKER,Stephen, 02/05/195	
12:00 PM	⊗ Thompson, Sam	ANDREWS,John, 9123 4567	
:15	SPENCER,Gilana, 11/11/198		
:30	ANDREWS,Julie, 234 6789,	ANDERSON,Penny, 1234 56	

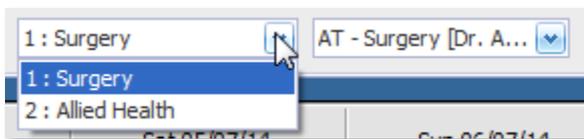
Tip: When you add a Fit Appointment, the new time slot generated is shared across all practitioners or all days of the week for the displayed practitioner in the Appointment Book. As such, if you attempt to schedule an appointment for this time slot for another practitioner, you will be prompted to confirm that you want to use the fit in appointment timeslot, in case your selection was made in error.



Recording a Recurring Appointment

If a patient requires recurring consultations, MedicalDirector PracSoft is capable to capturing repeating appointments based on a chosen schedule, including: hour/day/week/month/year

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).
4. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.

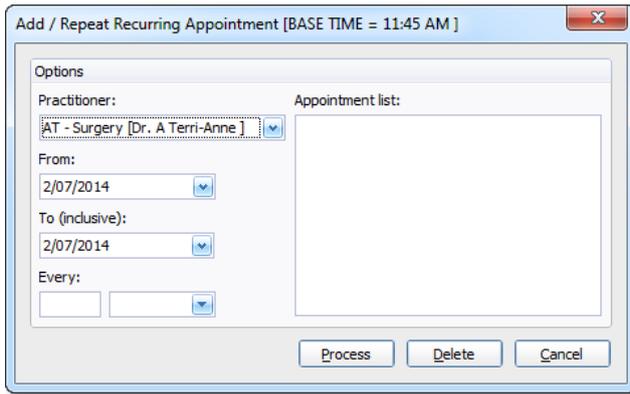


5. Right-click the appointment that is to be used as the base appointment, and select **Add Recurring Appointment**.

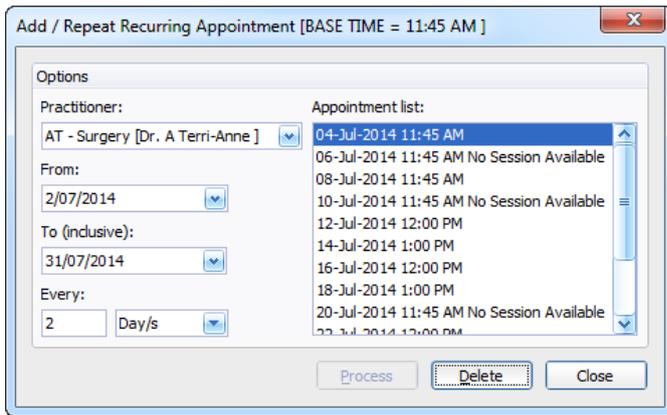




6. The **Add/Repeat Recurring Appointment** window appears.



7. Select a practitioner from the **Practitioner** drop-down list (the original practitioner is selected by default).
8. Select a start and end date for the period of recurring appointments.
9. Indicate the pattern and the time pattern of how often you wish the appointments to recur, e.g. every day, 2nd week, every month, 6th month, etc.
10. Click **Process**. A list of recurring appointments is displayed in the Appointment List section. If possible, recurring appointments are scheduled for the same time slot as the original, or at the next available time slot.



11. To delete a specific appointment from the list of recurring appointments, select the appointment from the list and click **Delete**. Note that you cannot select multiple appointments to delete simultaneously.
12. Click **Close** to confirm your selections and to return to the Appointment Book.

:45				
11:00 AM	LUCAS,Christine, , , 05/10/1		JAMES,Barry, , , 04/04/1991	
:15	KINDRA,Noah, , , 09/09/19	PRUE,Yerda, , , 23/09/194		
:30	PRUE,Yerda, , , 23/09/1943			
:45	BAKER,Stephen, 02/05/195	BAKER,Stephen, 02/05/19		BAKER,Stephen, 02/05/
12:00 PM	ANDREWS,John, 9123 4567			
:15				
:30	ANDERSON,Penny, 1234 56			
:45	**DECEASED**		**DECEASED**	

Tip: After closing the reoccurring appointment window, the recurring appointments are treated as individual appointments; it is no longer possible to deal with them as a group of recurring appointments.

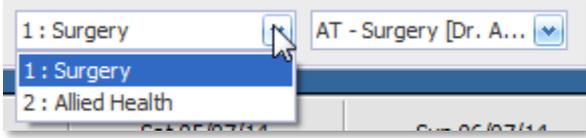
Tip: When adding a reoccurring appointment, if the practitioner is not available with 'No Session Available' on a selected date, you may need to add a one-off appointment for another practitioner, if appropriate.



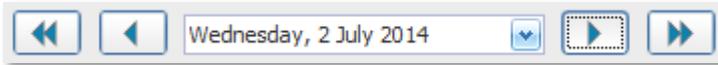
Adding a Reserved Appointment

A reserved appointment is essentially a time slot during the day the Practitioner is required to keep spare. The timeslot can either be cleared at the beginning of the day or kept for a patient requiring an emergency appointment.

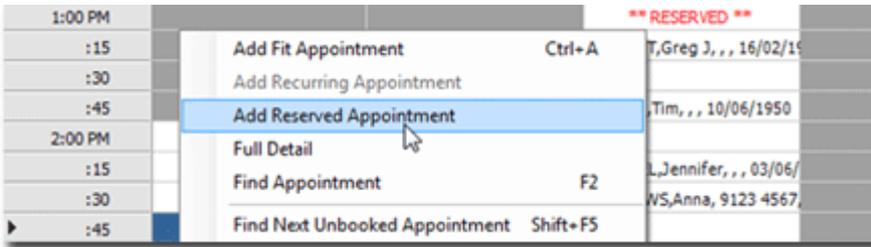
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



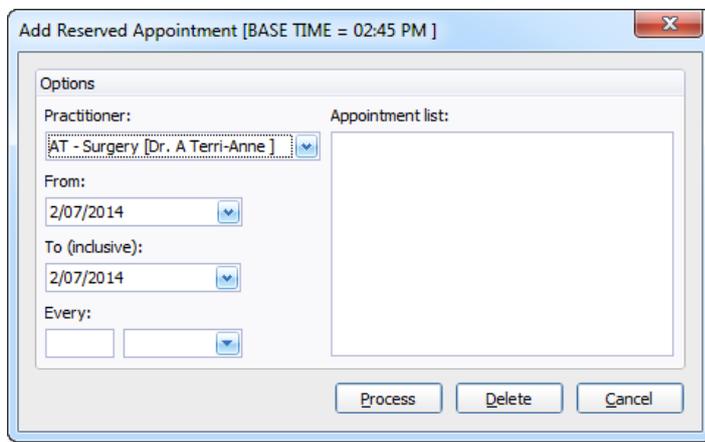
3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).
4. Locate the date you want to start adding the reserved appointment, use the calendar to jump forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.



5. Right-click the appointment that is to be used as the base appointment, and select **Add Reserved Appointment**.



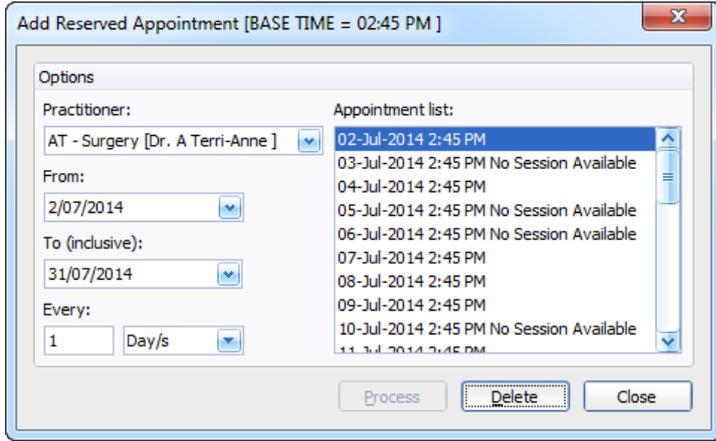
6. The **Add Reserved Appointment** window appears.



7. Select a practitioner from the **Practitioner** drop-down list (the original practitioner is selected by default).
8. Select a start and end date for the period of reserved appointments.
9. Indicate the pattern and the time pattern of how often you wish the reserved appointments to recur, e.g. every 4th hour, every day, 2nd day, every week, etc.



- Click **Process**. A list of reserved appointments is displayed in the Appointment List section. If available, reserved appointments are scheduled for the same time slot as the original, or at the next available time slot.



Note: If the selected base time for the reserved appointment (e.g. 12.15pm) is not available due to a clash with an existing appointment or occurs on a non-worked day, you will be prompted with a message stating "No Session Available" beside the proposed date/time. If the reserved appointment occurs at a time the practitioner is not working, the timing of the reserved appointment will be automatically adjusted to their next available time. If a booking already exists in this next timeslot, you will be prompted again with the message "No Session Available". You do not need to delete these appointments, as they will not appear in the Appointment Book.

- To delete a specific appointment from the list of reserved appointments, select the appointment from the list and click **Delete**.
- Click **Close** to return to the Appointment Book. For the time period selected, confirm the reserved appointments bookings. The reserved appointment will appear in uppercase red text.

2:00 PM			WOEIH, IIM, , , 10/06/1950
:15			GABRIEL, Jennifer, , , 03/06/
:30			ANDREWS, Anna, 9123 4567,
▶ :45	** RESERVED **		** RESERVED **
3:00 PM			Meeting
:15	NORMAN, Ibrahim, , , 01/08,		
:30	BABEL, Todd, 9123 4567, 08		
:45			

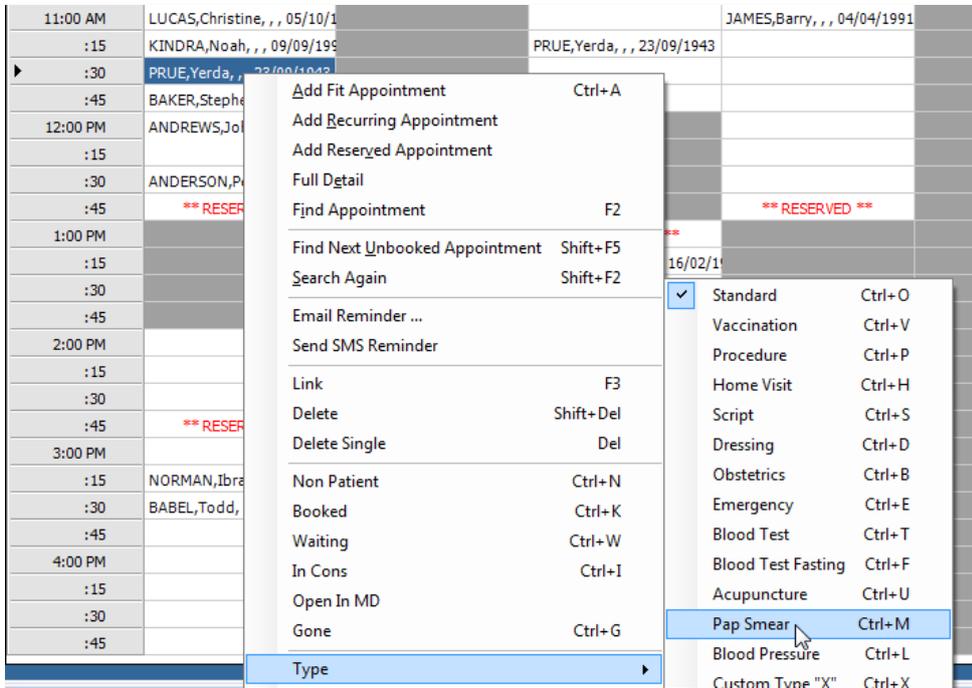
Note: Once the reserved appointments have been created, they are treated as individual appointments; it is no longer possible to deal with them as a group of reserved appointments.



Specifying the Type of Appointment

Once an appointment has been added into the Appointment Book, you can indicate the type of appointment the patient is scheduled for, e.g. 'Vaccination', 'Blood Test', 'Emergency', etc.

1. Within the Appointment Book, locate and right-click the appointment
2. Select **Type** from the menu that appears,
3. Click the Appointment Type from the list presented to you.



4. An icon representing the type of appointment appears next to the patient’s name in their booking.



Tip: Customise the list of appointment types available within the Appointment Book. To edit the list, from the menu select **Setup > Appointment Types**. Change the names of the existing types to suit the services offered at the practice, or alter the Custom Types 'X' 'Y' 'Z'.

Tip: Quickly assign an appointment type using the shortcut code; select the patient appointment and press the shortcut key combination on your keyboard

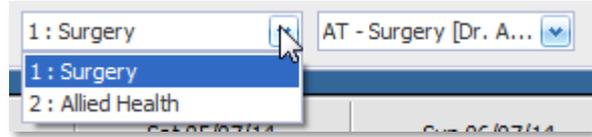
Canceling an Appointment

Deleting a Single Appointment

Periodically you will be required to cancel an appointment for a patient who no longer able to attend. The steps below are to delete a single timeslot.

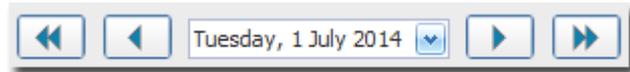
1. Open the **Appointment Book** by clicking the Appointment Book  button.

2. If multiple Appointment Books are available to you, select the book to set up.

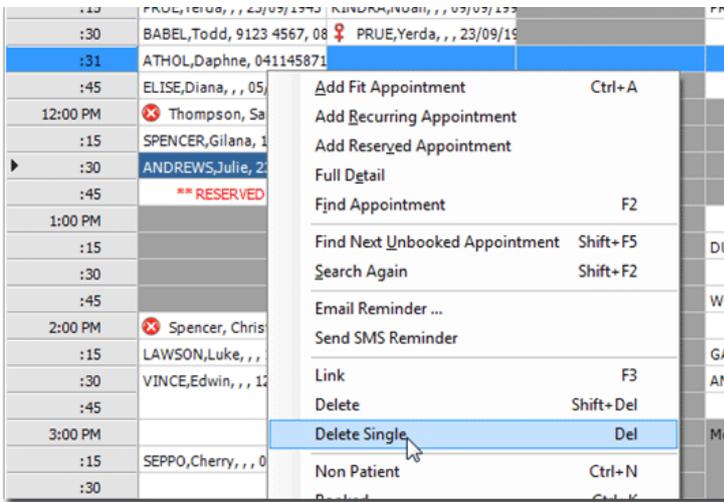


3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).

4. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.

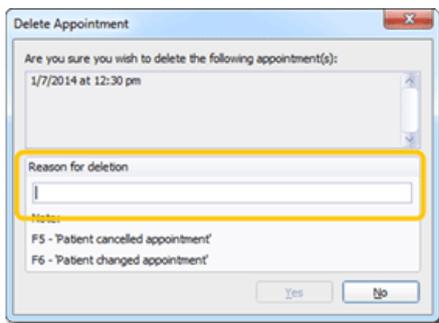


5. Right-click the appointment and select **Delete Single**. Alternatively, select the appointment and press **Delete**.



6. From the Delete Appointment window, review the details of the appointment you are about to delete. Confirm the patient's name and the timeslot to be deleted.

7. Enter the reason why the appointment is being cancelled.



Tip: If the patient cancels or changes the appointment, use the corresponding shortcut codes.

- Press F5 to record cancelled with date/time stamp.
- Press F6 to indicate the reason was change of time.

Reason for deletion

Patient cancelled appointment on 2/7/2014 at 12:51 PM

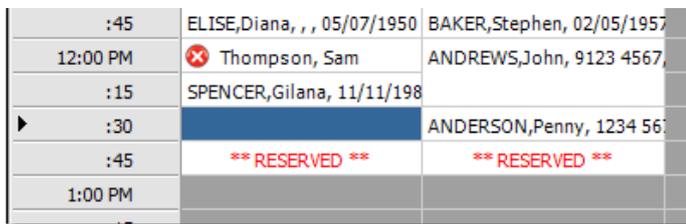
Note:

F5 - 'Patient cancelled appointment'

F6 - 'Patient changed appointment'

8. Click **Yes** to confirm the deletion.

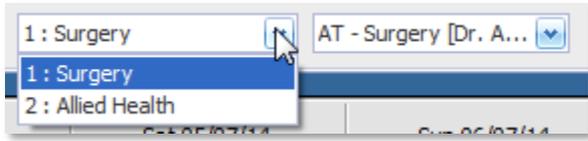
9. The deleted timeslot is now available for another patient to book.



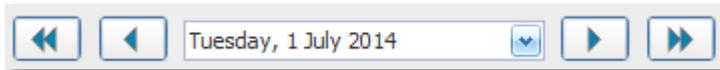
Deleting a Long Appointment

Patients requiring long appointments can either have the whole appointment deleted or part. The steps below are to delete a whole appointment.

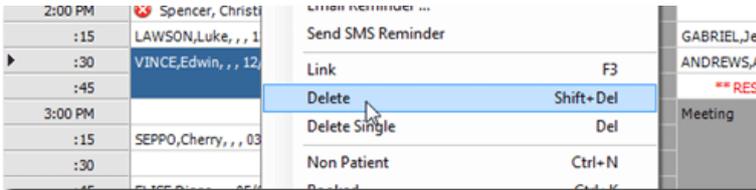
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



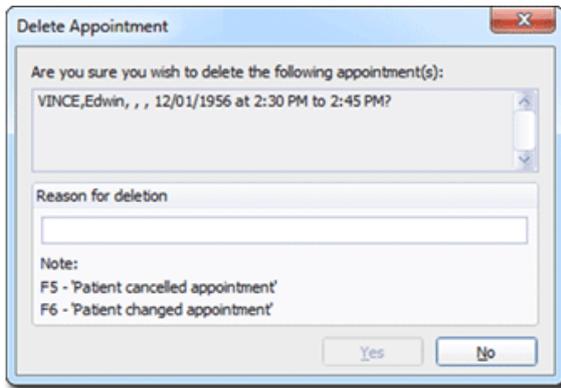
3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).
4. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.



5. Right-click the appointment you want to cancel, select **Delete**. You can also select the appointment and press **Shift + Delete** on your keyboard.



6. From the Delete Appointment window, review the details of the appointment you are about to delete. Confirm the patient's name and the time period.
7. Enter the reason why the appointment is being cancelled.

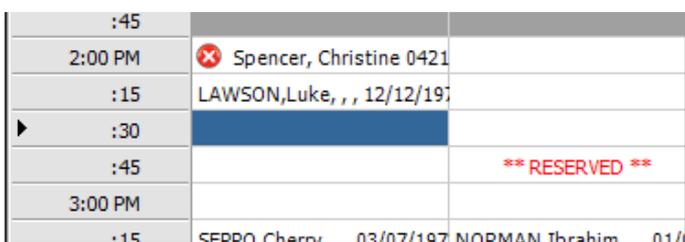


Tip: If the patient cancels or changes the appointment, use the corresponding shortcut code;

- Press F5 to record cancelled with date/time stamp.
- Press F6 to indicate the reason was change of time.



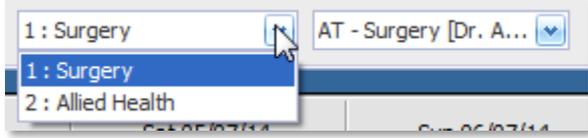
8. Click **Yes** to confirm the deletion.
9. The deleted timeslots are now available for another patient to book.



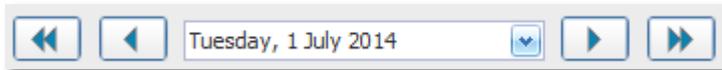
Deleting Part of a Long Appointment

Patients requiring long appointments can either have the whole appointment deleted or part. The steps below are to delete part of an appointment.

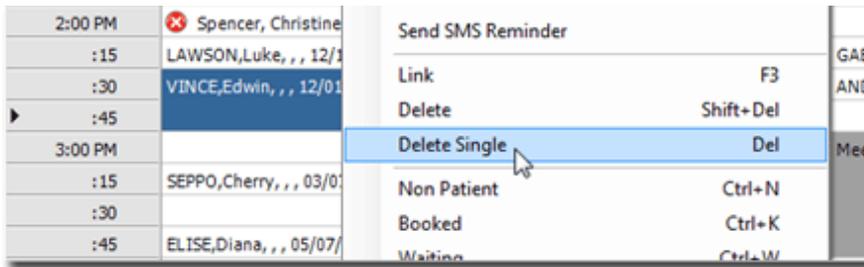
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



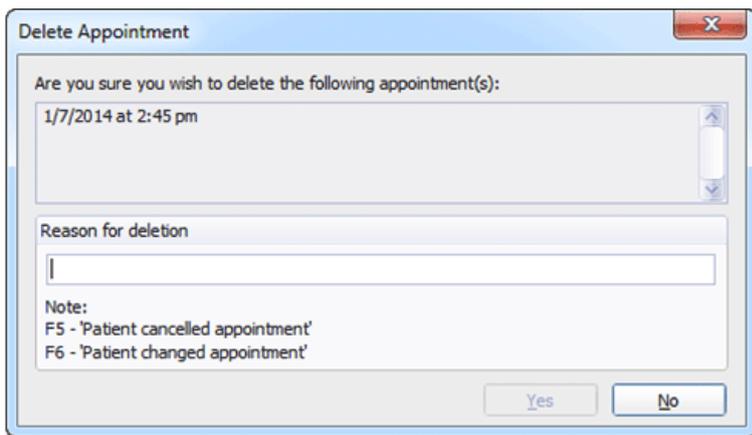
3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).
4. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.



5. Locate the appointment, and right-click the specific time slot you wish to delete and select **Delete Single**. You can also select the appointment and press Delete on your keyboard.



6. From the Delete Appointment window, review the details of the appointment you are about to delete. Confirm the patient's name and the selected timeslot to be deleted.
7. Enter the reason why the appointment is being cancelled.

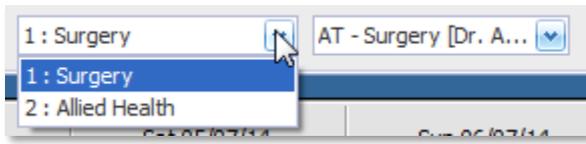


8. Click **Yes** to confirm the deletion. The deleted timeslots are now available for another patient to book.

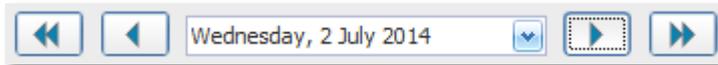


Deleting a Recurring Appointment

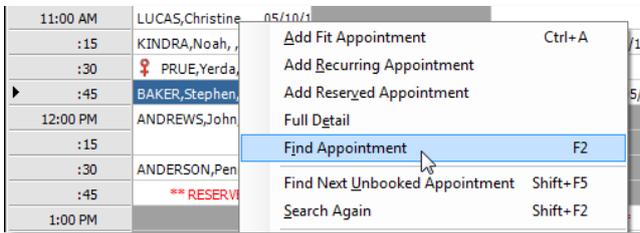
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



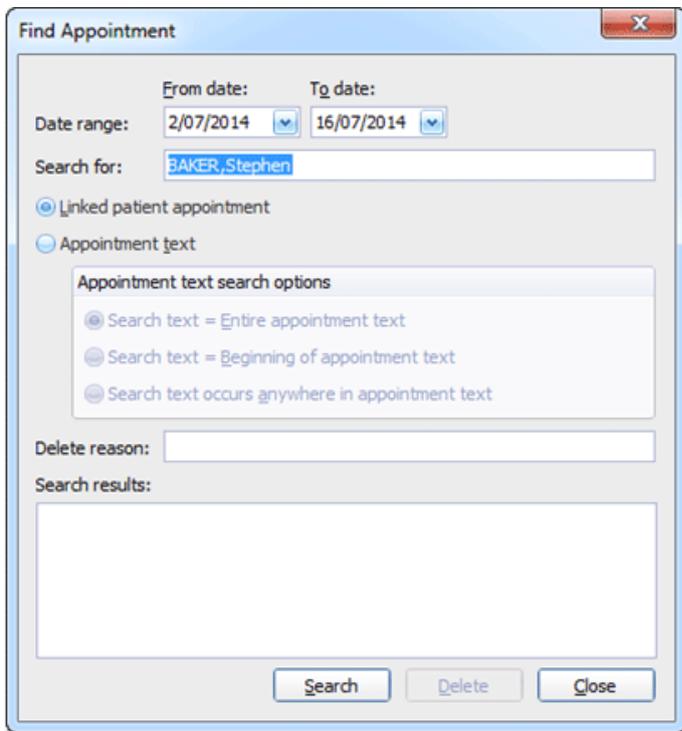
3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).
4. Locate the requested appointment date by jumping forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.



5. Right-click an instance of the recurring appointment, and select **Find Appointment**.



6. From the Find Appointment window, enter your search criteria using the options available.

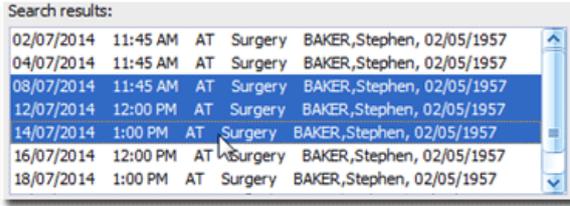


7. Click **Search** to find all appointments that match your criteria.
8. Enter the reason why these appointments are being cancelled.

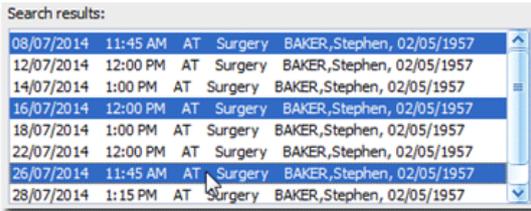




9. From the list of search results, select the appointments you wish to delete;
 - o To select a sequence of appointments, click-hold and scroll up/down through the list.



- o To select multiple appointments that are not in sequence, hold down the **CTRL** key and select each appointment individually.



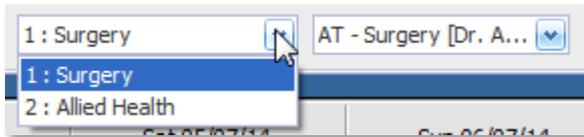
Note: The deletion option is only available if you enter a 'delete reason'.

10. Click **Delete** to remove the one or multiple selected appointments. You will be prompted to confirm this action.

Rescheduling an Appointment

If for any reason you need to reschedule an appointment, MedicalDirector PracSoft requires that you actually *delete* the appointment first, and then schedule a *new appointment*. This process has been made a little easier by providing a way to 'cut' an appointment from one slot and 'paste' it into another.

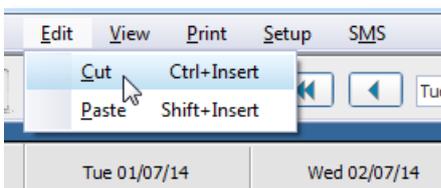
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



3. Select the practitioner either using the Practitioner's column (day view) or drop-down list (weekly view).
4. Locate the appointment to reschedule, jump forwards/backwards by day or week. Alternatively navigate periods by using the monthly calendar.

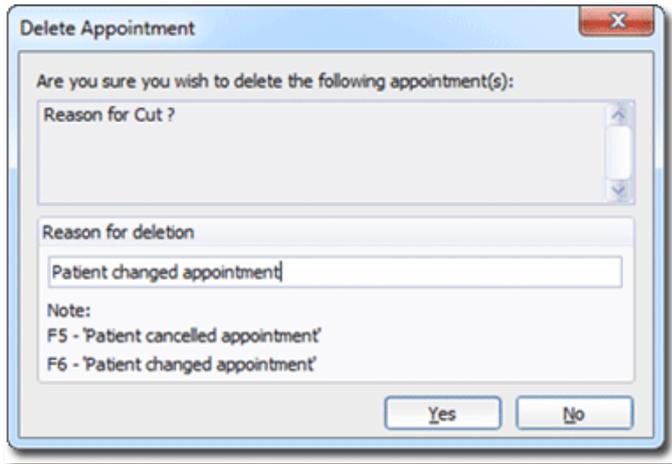


5. Select the appointment to reschedule, from the menu select Edit > Cut, or press **Ctrl+Insert** on your keyboard.

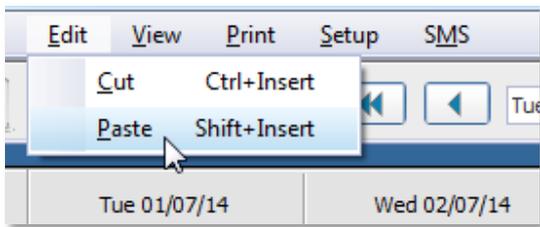




- The **Delete Appointment** window will appear, prompting you for a reason for cutting the appointment, e.g. "Patient changed appointment". Click **Yes**.



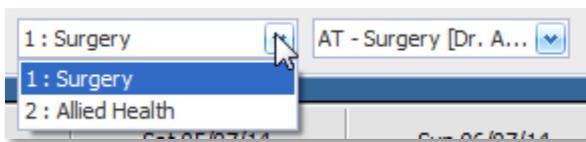
- Highlight a new appointment timeslot, in the menu select **Edit > Paste**, or press **Shift+Insert** on your keyboard.
- The appointment has been rescheduled and will now appear in the new time slot.



Searching for Patient Appointments

It is possible to conduct a search of recorded appointments. You can search by a patient’s name, or by looking for specific text within the appointment.

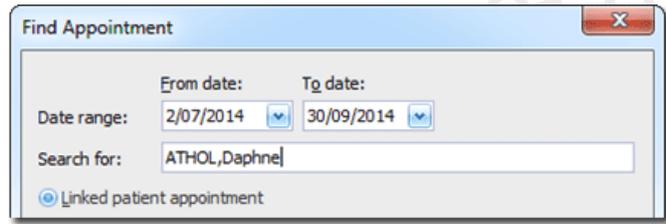
- Open the **Appointment Book** by clicking the **Appointment Book**  button.
- If multiple Appointment Books are available to you, select the book to set up.



- Right-click an existing appointment, select **Find Appointment**. Alternately select a blank timeslot, and from the menu, select **Appointments > Find Appointment**, or press **F2** on your keyboard.
- Adjust the date range is desired.
- Specify the search criteria to look for, from either the **Linked Patient Appointment** or **Text Search** options:

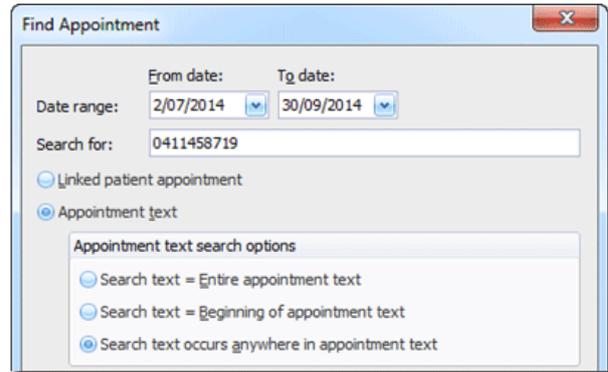
Search via Linked Patient

1. Type in the patient's name.
2. Click **Search**. If there are multiple names that match your criteria, you will be prompted to select the patient from the Search Patient window. Once you have located the patient, click **OK** to start the search for the patient's appointments.



Search via Appointment Text

1. Type in a word or phrase to search for, e.g. a phone number or date of birth.
2. Select to search via Appointment text, choose where the phrase is located.
3. Click Search.
4. The appointments matching your criteria are displayed in the list.

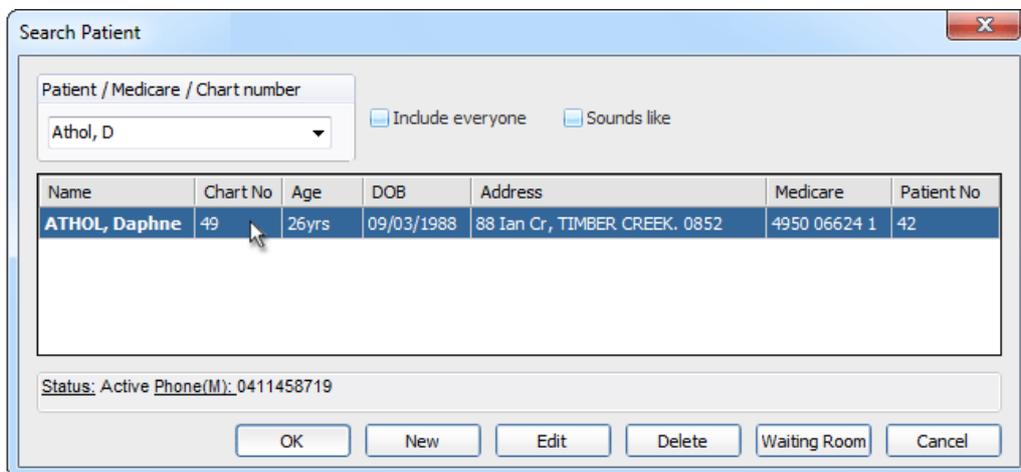


Printing Appointment List: For Patient

For patients that do not have regular access to email or a mobile, an alternate method of reminding the patient of future bookings is to provide them a printed list. This may be especially useful for the elderly, or patients who have regular appointments booked months in advance.

Method 1 (if the patient is not readily visible in the Appointment Book)

1. From within the Appointment Book, select **Print > Patient Appointments**.
2. You will be prompted to confirm that you wish to print appointments for the selected patient. Click **No**, to be able to search for the patient from your database.
3. The **Search Patient** window appears. Locate the patient whose appointment schedule you wish to print.



4. Once selected, click OK. A list of future appointments for the patient appears in print preview.

Method 2 (if the patient is clearly visible in the Appointment Book)

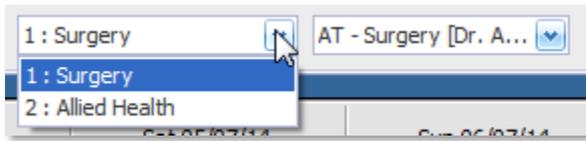
1. Within the Appointment Book, locate and select the patient.
2. Select **Print > Patient Appointments**. You will be prompted to confirm that you wish to print appointments for the selected patient.
3. Click **Yes**. A list of future appointments for the patient appears in print preview.



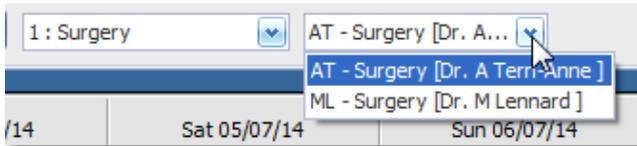
Printing Appointment List: For Practitioner

If a practitioner would like to have a printed copy of the day's appointments, you can generate a report that includes the patient names, schedule time, and the appointment type.

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to use.



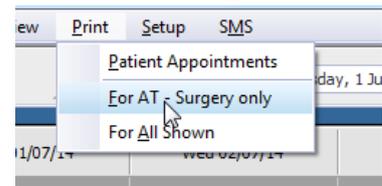
3. If the Appointment Book is in week view, select the practitioner from the list.



4. Select the day you wish to print. To do this, simply select one of the time slots for the day. In the example below, all appointments for Tuesday 1st July 2014 will be printed.

Time	Tue 01/07/14
:45	
▶ 11:00 AM	KINDRA,Noah, , 09/09/1993
:15	PRUE,Yerda, , 23/09/1943
:30	BABEL,Todd, 9123 4567, 08
:31	ATHOL,Daphne, 041145871
:45	ELISE,Diana, , 05/07/1950
12:00 PM	⊗ Thompson, Sam
:15	SPENCER,Gilana, 11/11/198
:30	
:45	** RESERVED **

5. From the menu, select **Print > For. [Doctor]**. Select the specific doctor for whom you wish to print appointments.
6. From the preview, click **Print** to print out a list of appointments for the day.



Appointments for AT - Surgery on Tuesday 1 July 2014	
11:00 AM	KINDRA,Noah, , 09/09/1993
11:15	PRUE,Yerda, , 23/09/1943
11:30	BABEL,Todd, 9123 4567, 08/02/2000
11:45	ATHOL,Daphne, 041145871, 09/03/1988
12:00 PM	⊗ Thompson, Sam
12:15	SPENCER,Gilana, 11/11/1981
12:30	** RESERVED **
12:45	SPENCER,Christine 2421 345 122
1:00 PM	VOICE,Down, , 12/01/1995
1:15	VOICE,Down, , 12/01/1995
1:30 PM	SEPPD,Christy, , 03/07/1972
1:45	ELISE,Diana, , 05/07/1950
2:00 PM	LOU,Rosanne, , 04/05/1994
2:15	LOU,Rosanne, , 04/05/1994
2:30	LOU,Rosanne, , 04/05/1994

Reminders

The two primary mechanisms for reminding patients from within MedicalDirector PracSoft are via SMS or email communication:

- SMS Reminder functionality allows you to send private SMS messages to a patient's mobile phone. The secure message transfer is managed by a third party, MessageNet, with whom you first register with in order to send SMS messages to patients.
- Sent from the practice's email account; send patients an appointment reminder to their nominated email address.

To maintain privacy when communicating with patients, MedicalDirector advises that you put in place a signed agreement to allow the practice to send appointment reminders. As part of the registration process for new patients, include the ability to opt in or opt out of receiving reminder messages.

Setup SMS Reminders

Before being able to transmit SMS to your patients, you must first register with MessageNet. This activates the SMS module within MedicalDirector PracSoft.

1. From the menu, click **SMS > Setup SMS Reminders**.
2. On the Registration Details tab, click **Register for SMS**.

3. Create an account; enter a unique **Username** and **Password**.
4. Click **Register** to verify the account details and active the SMS module.

- Your Internet browser will open and attempt to connect with the MedicalDirector PracSoft / MessageNet web page for SMS registration. On the registration form, the Practice ID is automatically populated. Complete the form by inserting details about the practice, a primary contact, and your chosen credit card payment type.

MessageNet  
MessageNet/PracSoft Software Online Registration Request
 *Please note all fields are required.

Practice Name: * For Your Health **Practice ID:** * 6747562283

Postal Address: **State:**
City: **Postcode:**

Contact Details: **Name:** *
Position:
Phone Number: *

Billing Contact Details:
 Same as Contact
Name:
Phone Number:

- Once you have completed the registration form, click **Continue**.
- Continue completing the form, including the option to choose the pre-paid plan. When completed click **Submit**.
- You will be sent a verification email to the email address you entered within the registration form.
- Once you have received the verification email, return to MedicalDirector PracSoft and click **Verify Registration** to verify and save your registration information.

Setup SMS Reminders

Registration Details | Standard Message | Message Schedule | SMS Scheduler | Credit Status

Username:

Registration completed

- Upon a successful verification you will be prompted accordingly.

PracSoft

 Registration for SMS reminder verification successful.

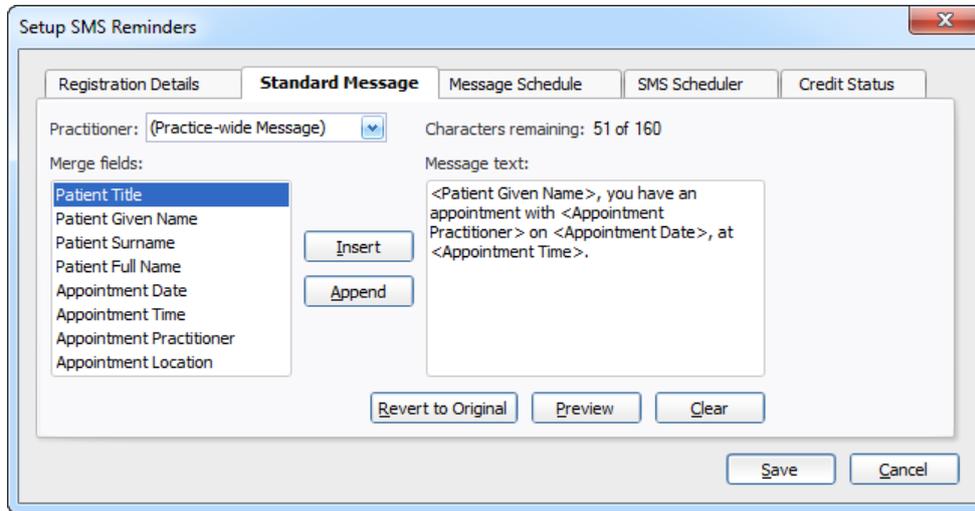
- Click **OK** to close the prompt.
- On the Setup SMS Reminder window, click **Save** to record your settings. Your account will be credited with 100 Free SMS messages.



Standard Message

Used as the template for all SMS messages, customise the text to be included in the message.

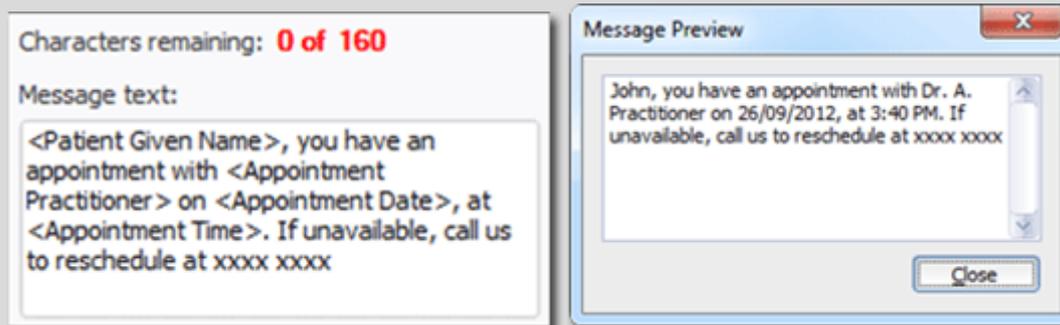
1. From the menu, click **SMS > Setup SMS Reminders**.
2. Select the **Standard Message** tab
3. Either use the provided SMS messages, or adjust the text to better suit your practice's requirements. To adjust, insert other merge fields, or include additional contact details in the message text.



Optional: As part of the message, you may decide to include the following text:

- Do not reply to this message.
- If unavailable, call us to reschedule at xxxx xxxx

Tip: After editing the message text, click Preview to view what the SMS will look like. Ensure that the message remains under 160 characters in length.

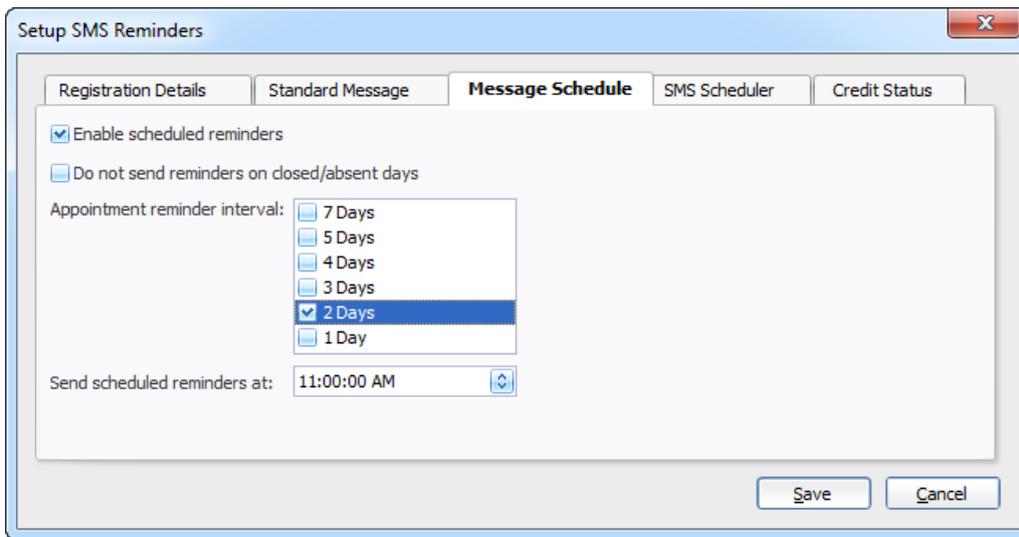


Message Schedule

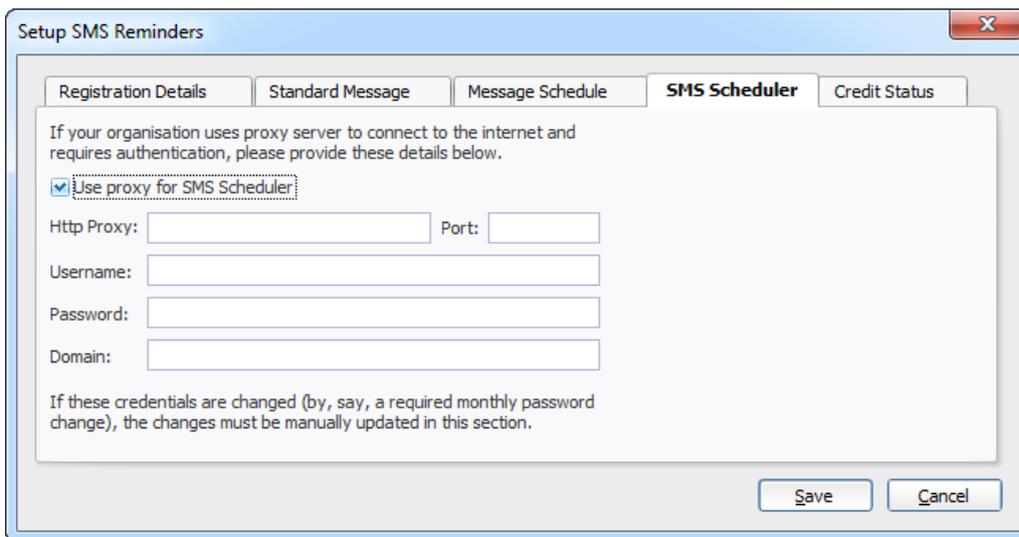
If you have purchased a large amount of message credit, you may decide that you want to automatically send bulk SMS reminders to your patients. To automate this function you must first configure MedicalDirector PracSoft to enable scheduled SMS reminders. Included in the setup is the option to send reminders on a practitioner’s behalf, choosing which patients will receive messages, and what type of appointments you want to remind patients to attend.

Enable Schedule Reminders

1. From the menu, click **SMS > Setup SMS Reminders**.
2. Select the **Message Schedule** tab.
3. Tick to **Enable Scheduled Reminders**.
4. Specify how many days in advance you want to send the reminder, and importantly what time of the day you want to send the SMS.



5. For practices that connect to the Internet via a proxy server, you will need to enter authentication details into MedicalDirector PracSoft to allow communication to the SMS provider.



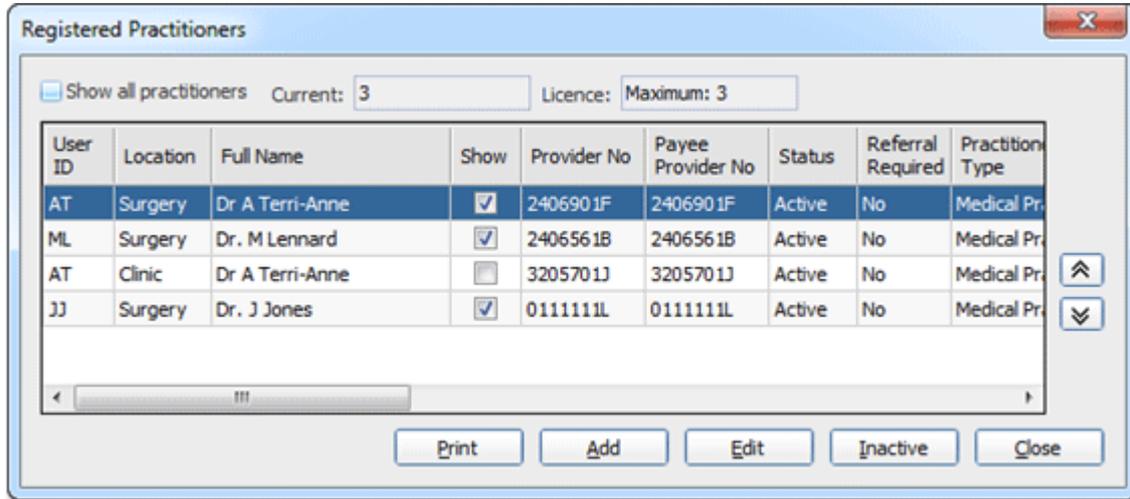
6. Click **Save** to record the setup changes.



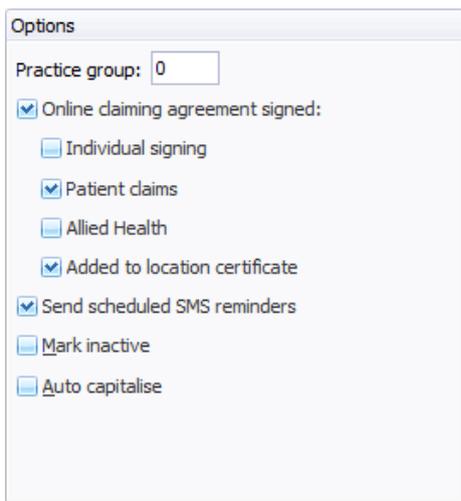
Practitioner Opt-In

The practitioner must opt-in to send scheduled appointment reminders on their behalf.

1. From the menu, click **Admin > Practitioners**.
2. On the **Registered Practitioners** window, select the practitioner, click **Edit**



3. Under options, confirm if the practitioner is to send messages; tick **Send scheduled SMS reminders**.

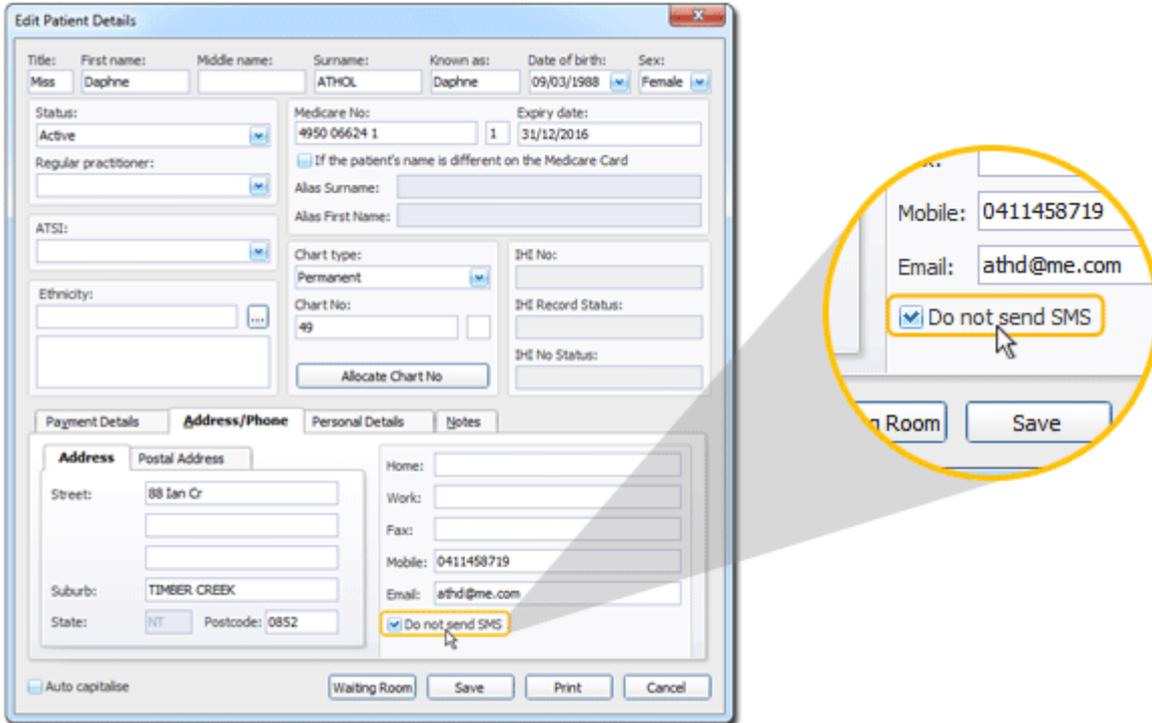


4. Click **Save** to record their preference.
5. Review the remaining Practitioner’s profiles, confirming their preference to send reminders on their behalf.

Patient Opt-Out

As part of the practice’s new patient form or consent form, nominate if the patient’s preference is to not receive appointment reminders via SMS.

1. When adding a new patient or reviewing the details of an existing. Confirm their current preference.
2. From the New or Edit Patient Details window, select the **Address/Phone** tab.
3. Record the patient’s preference. If they do not want to reminders, tick **Do not send SMS**



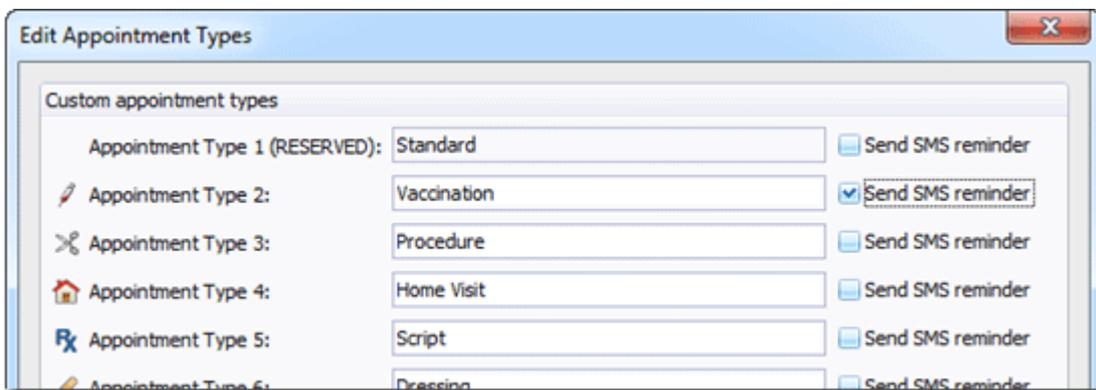
4. Click **Save** to record the changes to the patient’s details

Note: A patient must have a mobile number recorded to receive SMS reminders.

Appointment Type

To assist the practice, target the patients you need to remind; via the Appointment Types window, nominate which appointment types will receive a scheduled SMS reminder.

1. Within the Appointment Book, select **Setup > Appointment Types**.
2. From the list of appointment types, select which appointment types to send reminders too.

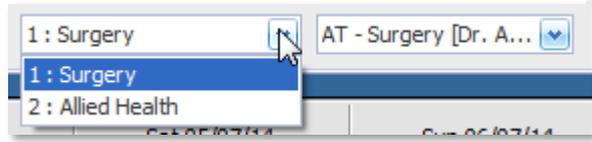


3. Click **Save**. Scheduled SMS reminders will only be sent for the appointment types you select.

Send Individual SMS

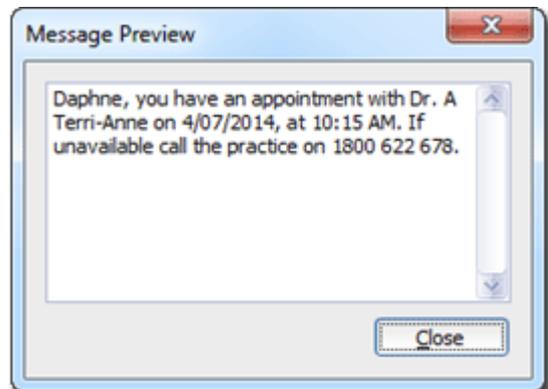
As an option, the practice can elect to contact patients on a case-by-case basis, prompting patients who need further medical treatment based on an urgent recall, or a patient who due to memory loss requires additional assistance.

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to use.
3. From the Appointment Book window, select the patient/s you want to contact via SMS.
4. In the menu, select **Appointment > Send SMS**



Reminder or click the **Send SMS to Patient**  button. The **Send Reminder SMS to Patient** window appears.

5. If required, adjust the standard message text by inserting other merge fields and/or by typing directly into the text box. Click **Preview** to read the message before sending.
6. Click **Send**. You will receive a confirmation message that the patient has been issued a SMS reminder.



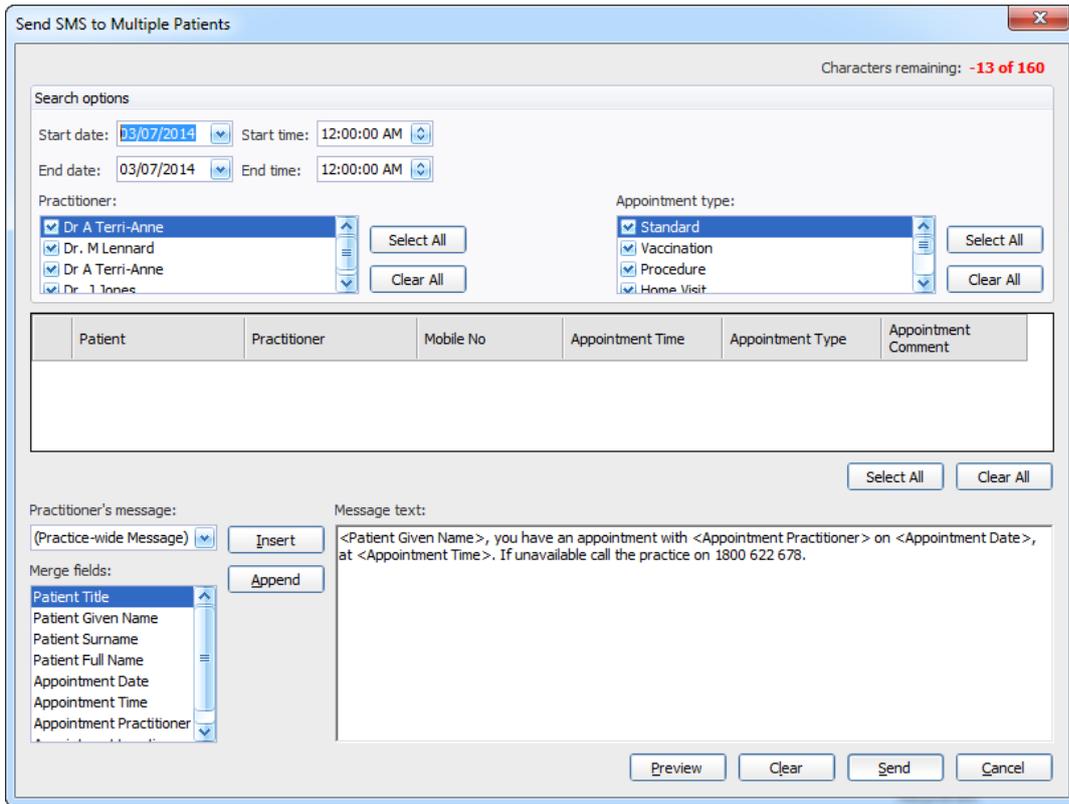
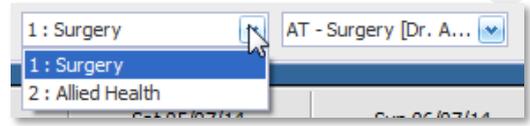
Important: If the patient informs you that they do not want to receive SMS reminders, or their mobile number is unknown, you will receive a prompt with their alternate contact details.



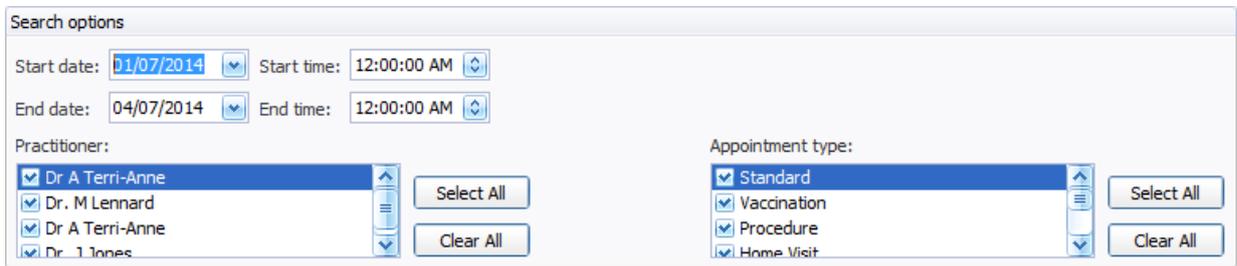
Send Multiple SMS

If you need to quickly contact multiple people, MedicalDirector PracSoft provides a facility for sending SMS messages to a group of recipients. Similar to an Individual SMS, you can broadcast a reminder or message to patients only when required.

1. Open the **Appointment Book** click the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to use.
3. In the menu, select **SMS > Send SMS to Multiple Patients**. The **Send SMS to Multiple Patients** window appears.



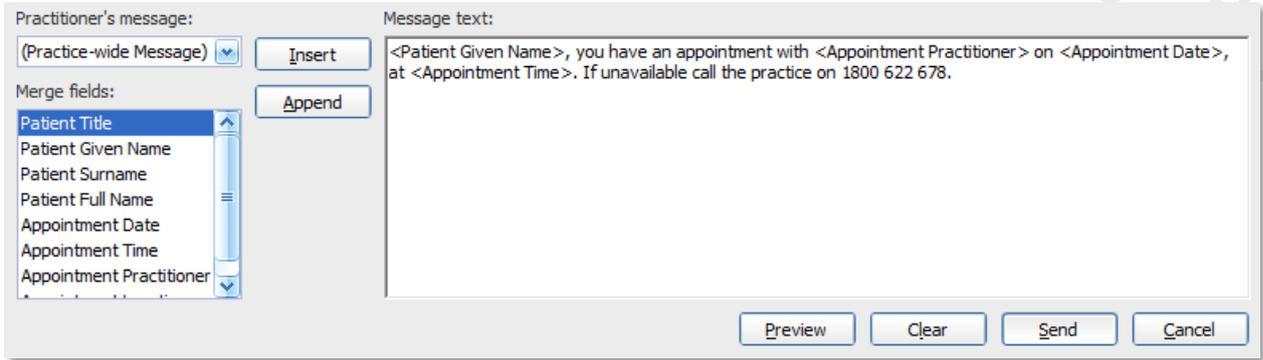
4. Using the search options, insert the criteria to locate the patient appointments, including appointment date, time range, practitioner, and appointment type.



5. The list of patients will refresh dynamically, reflecting your search criteria.

	Patient	Practitioner	Mobile No	Appointment Time	Appointment Type	Appointment Comment
<input checked="" type="checkbox"/>	Mr Noah KINDRA	Dr. A Terri-Anne		01/07/2014 11:00:0...	Standard	
<input type="checkbox"/>	Ms Yerda PRUE	Dr. A Terri-Anne		01/07/2014 11:15:0...	Standard	
<input type="checkbox"/>	Todd BABEL	Dr. A Terri-Anne	None.	01/07/2014 11:30:0...	Standard	

- Using the list, nominate who will receive the SMS message. Alternatively click **Select All**.
- Adjust the message text to suit the information you want to send. Ensure that the message is less than 160 characters in length.



- Click **Send**. You will receive a confirmation prompt that the message was sent successfully.



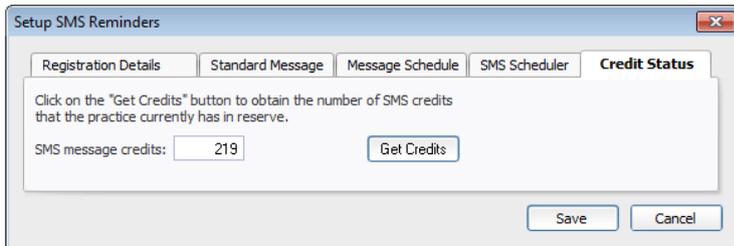
Note: If the patient has opted-out from receiving SMS messages, you will receive a prompt to say that an error occurred. Investigate the error log to discover the nature of the errors. From the menu, select **SMS > View SMS Log**.



Credit Status

Track in real time how many SMS credits the practice has in its account.

- From the menu, click **SMS > Setup SMS Reminders**.
- Select the **Credit Status** tab.

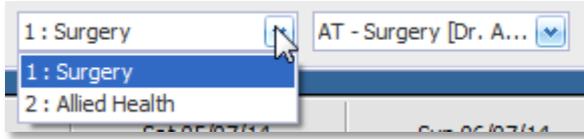


- Click **Get Credits** to identify how many SMS you have available.

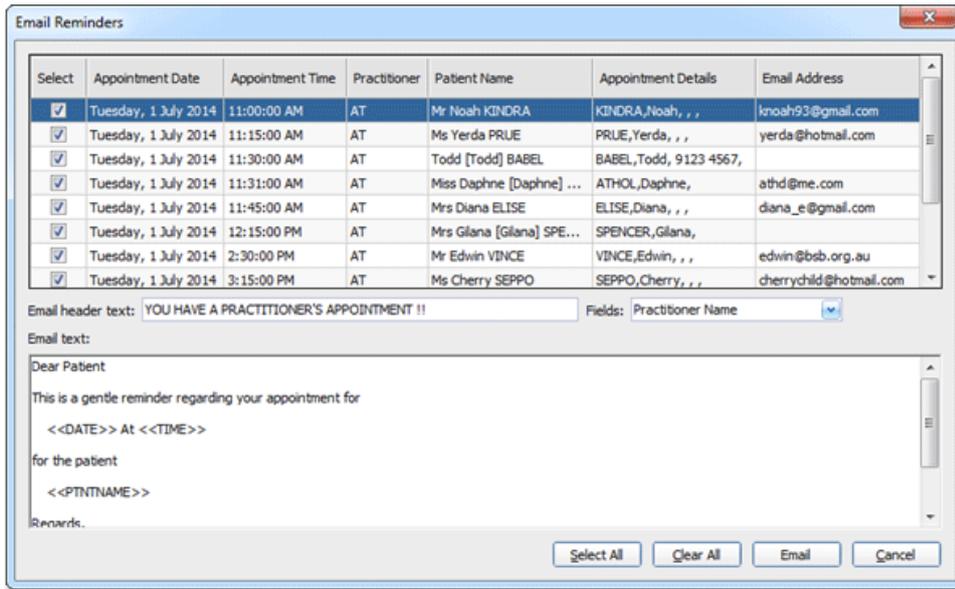
Note: When you are running low of SMS credits, purchase additional credits online. Click **Get Credits**.

Email Reminders

1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to set up.



3. Select the day of the week you wish to email your patients. To do this, simply select a future day.
4. From the menu, select **Appointment > Email Reminders**.



5. The details of the week’s appointments are displayed for review; nominating patient’s with a recorded email addresses. If required, deselect any appointment/patient that you do not want to include in the email.
6. Tailor the information to be sent to the patient, including the email subject and text. For example, the word ‘Patient’ has been deleted, and replaced for the field <<PTNTNAME>> which was selected from the Fields drop-down menu.



7. Click **Email** to send the appointment reminder. You will be prompted to confirm this action.
8. A final confirmation prompt will display the total number of emails sent versus the number of appointments in the list.

Waiting Room

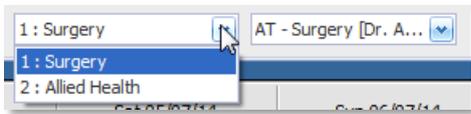
The Waiting Room in MedicalDirector PracSoft is where you track the movements of patients waiting for a consultation. From the Waiting Room you can;

- Keep a track of who is currently in your Waiting Room, and for how long.
- Assign visiting patients to specific practitioners.
- Specify items that the patient will be billed for, and the type of billing.
- See the type of appointment (e.g. 'Emergency' or 'Blood Test').
- Record notes about the patient and their visit.

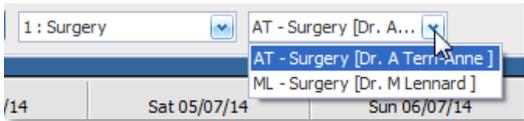
Appointment: Existing Patient

When a patient arrives at the practice with an existing appointment, you need to register that the person is now located in the Waiting Room. This process is only available to existing patients, and not available to walk-ins.

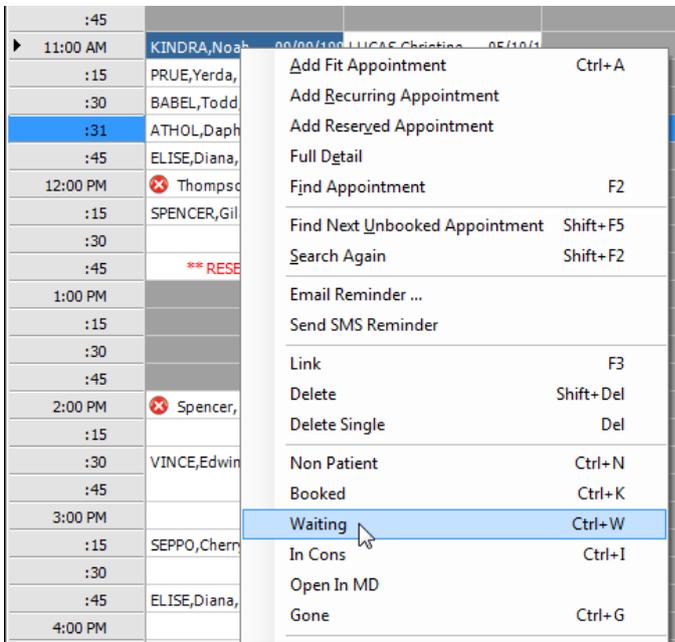
1. Open the **Appointment Book** by clicking the **Appointment Book**  button.
2. If multiple Appointment Books are available to you, select the book to use.



3. If the Appointment Book is in week view, select the practitioner from the list



4. Locate and right-click the patient's appointment. From the menu, select **Waiting**, or press **Ctrl+W**.

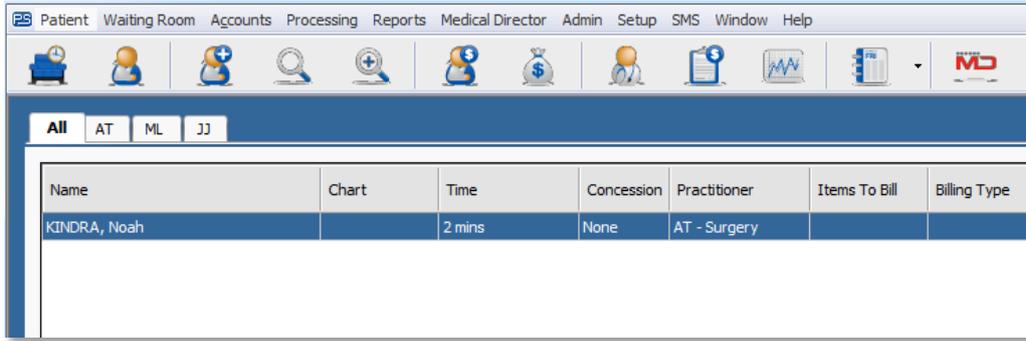


5. In the Appointment Book, the patient's name will be displayed in Blue text

:45			
11:00 AM	KINDRA,Noah, , , 09/09/199	LUCAS,Ch	
:15	PRUE,Yerda, , , 23/09/1943	KINDRA,M	
:30	BABEL,Todd, 9123 4567, 08	♀ PRUE	



6. The patient will now appear in the Waiting Room, awaiting their consultation.



Tip: At this time with the patient in the waiting room, it is an ideal opportunity to verify that you have the latest information about the patient, including address and phone numbers. In addition, quickly perform an OPV check; this will verify the patient's Medicare status, including name, dob, Medicare card and expiry date.

Appointment: New Patient

When an appointment is made for a new patient (i.e. a person who is not already recorded in the MedicalDirector PracSoft database), only a limited amount of information is initially recorded within the Appointment Book (e.g. Patient Name and Contact number). When the patient arrives for their appointment, you will need to create a patient record first, before being able to add them to the Waiting Room.

Important: For a new patient with an appointment, you cannot directly transfer them to the Waiting Room. In selecting **Waiting** their name will appear in blue however will not be displayed in the Waiting Room.

:15	PRUE, Yerda, , , 23/09/1943	KIN
:30	BABEL, Todd, 9123 4567, 08	♀
:31	ATHOL, Daphne, 041145871	
:45	ELISE, Diana, , , 05/07/1950	BA
▶ 12:00 PM	⊗ Thompson, Sam	AN
:15	SPENCER, Gilana, 11/11/198	
:30		AN
:45	** RESERVED **	
1:00 PM		

1. From the Waiting Room, click the **Add New Patient**  button, or press **F6** to record the details for the new patient.
2. Record the patient's details into the MedicalDirector PracSoft database, including their Name, Date of Birth, Gender, Status, Medicare details, Address, Next of Kin, etc.

Tip: For more information about how to create a patient, refer to section on [Creating a Patient Record](#).

3. Click **Waiting Room**, to simultaneously create the patient's record and add them to the Waiting Room list.

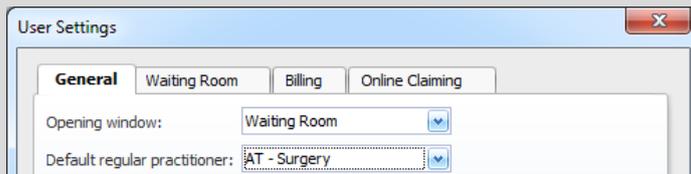
Walk-in: Existing Patient

When a patient arrives at the practice without an appointment, you can add them to the Waiting Room if they require urgent medical care or the practitioner has time available. Otherwise you can make an Appointment Booking for a future time/date.

- From the tabs available on the top of the Waiting Room window, select the practitioner you want to assign the patient to. The **All** tab will assign the patient to the default practitioner.

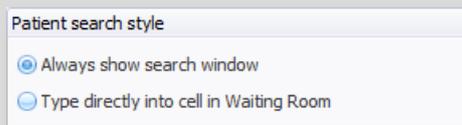
Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type
KINDRA, Noah		46 mins	None	AT - Surgery		
PRUE, Yerda		37 mins	None	AT - Surgery		
BABEL, Todd		37 mins	None	AT - Surgery		
ATHOL, Daphne		37 mins	None	AT - Surgery		
ELISE, Diana		37 mins	Vet Speci...	AT - Surgery		

Note: If the All tab is selected, and the patient does not have a default practitioner recorded, the patient will be assigned to the default practitioner specified in Setup > User Settings. If no default practitioner is selected, the patient will be unassigned.



- Click **Add**, or press **F3** to add the existing patient to the Waiting Room. The **Add Patient(s) to Waiting Room** window appears.

Tip: When adding patients to the Waiting Room, select your preference to either perform a search before adding, or directly type the patient's name into the Waiting Room list. This preference is configurable from **Setup > User Settings**



- Enter the **Patient's name** in the search field.

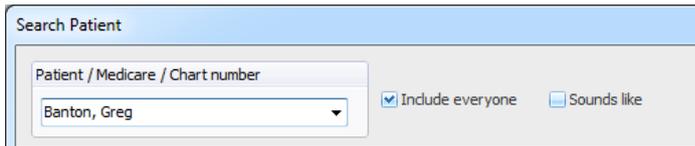
Name	Chart No	Age	DOB	Address	Medicare	Patient No
Rain, Jacob	31	60yrs	02/02/1955	18 O'Halloran St, KAMBAH. 2902	2950 14362 1	43

- Using the patient's details (DOB, Address, Medicare Card) to confirm their identity, select the specific patient from the search results. Click **OK** to add the patient to the Waiting Room.

Walk-in: New Patient

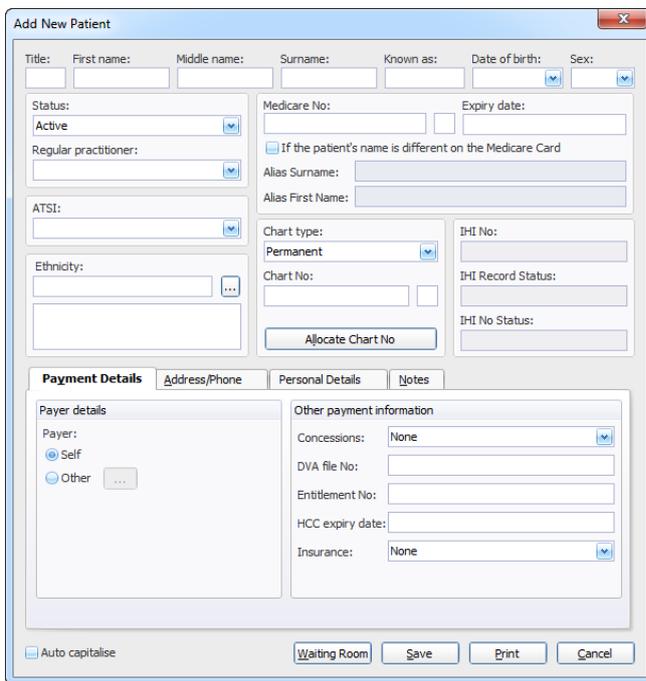
When a patient arrives at the practice without an appointment, you can add them to the Waiting Room if they require urgent medical care or the practitioner has time available. Otherwise you can make an Appointment Booking for a future time/date.

1. Ask the person to complete the practice's 'new patient' form.
2. Once completed, click the **Search Patient**  button, or press **F2** to confirm that the patient has not previously attended the practice.
3. Enter the patient's name in the search field. Tick the **Include Everybody** check box to display all inactive patients, emergency and contact persons.



*Note: If the person is recorded as an inactive patient (red text), emergency (red italicised/bold) or next of kin (blue italicised), select the record, click **Edit** to change their status to 'Active'. Update the recorded details in their patient record.*

4. Using the search results, ensure that the patient's record does not exist, and then click **New**. The Add New Patient window appears.
5. Record the patient's details including their Name, Date of Birth, Gender, Status, Medicare details, Address, Contact Details, Next of Kin, etc.



6. Click **Waiting Room** if the patient is waiting to see a practitioner, or click **Save** or record their details for a future consultation.

Check Patient's Outstanding Payments

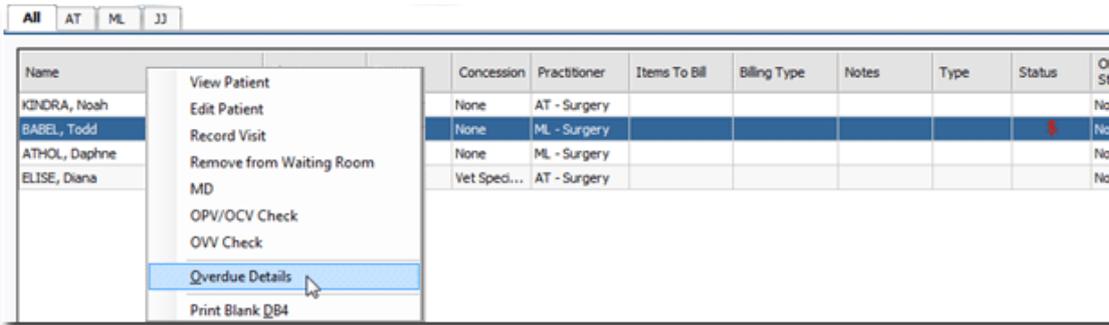
After adding the patient to the waiting room, review the patient's account status to see if the patient has money owing. Use this status to follow up outstanding debt as well as determine how the patient will pay for future visits.

1. In the Waiting Room, locate the patient you want to review their financial status.

Tip: If the symbol in the status column represents outstanding account.

- Green 💵 is money owing
- Red 💵 is money owing past due date
- Red ✖️💵 is money previously written-off

2. Right-click the patient, select **Overdue Details**

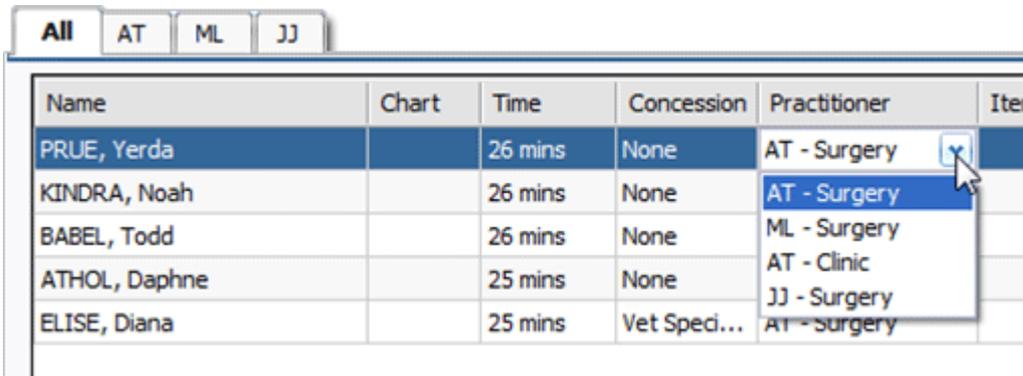


3. The total amount owing along with the age of the debt will appear in a pop up window. Click **OK** to return to the Waiting Room.

Changing Practitioners

If a practitioner is running late or is called away in an emergency, you can quickly reassign a patient in the Waiting Room to another practitioner.

1. In the Waiting Room, locate the patient you wish to transfer.
2. Double-click the field containing the Practitioner's name that corresponds with the patient.
3. Select the appropriate practitioner from the drop-down menu.



4. The patient is now assigned to the selected practitioner.

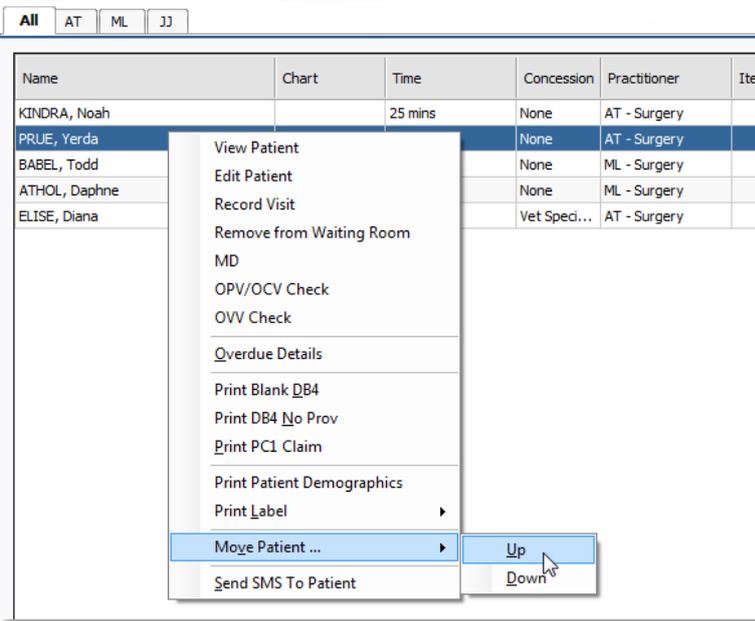




Change Priority Order within the Waiting Room

Before amending the patient’s priority order of the Waiting Room, note the time the other patients have waited.

1. In the Waiting Room, right-click the patient’s name.
2. Select **Move Patient**, either to move **Up** or **Down** in priority.

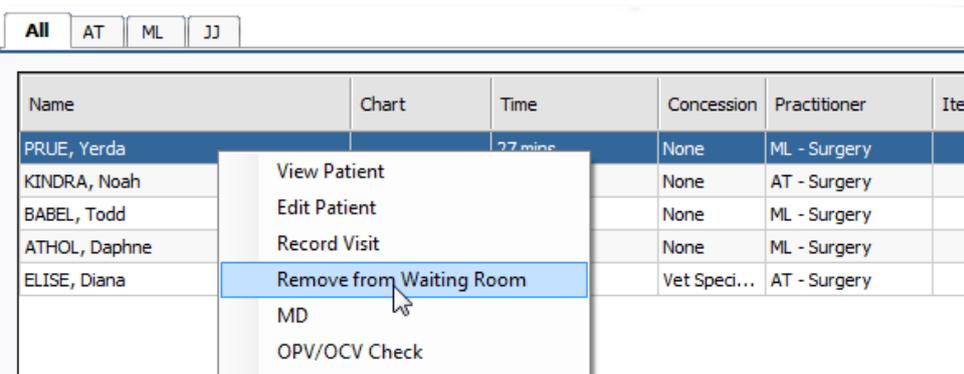


3. Repeat this method until the patient has been shifted to the desired position.

Remove Patient from the Waiting Room

Occasionally you may need to remove a patient from the Waiting Room, if for example they decided to leave the practice before visiting the practitioner.

1. Select the patient to remove from the Waiting Room.
2. Locate the patient and either;
 - o Right-click the patient, and select **Remove from Waiting Room**.
 - o Click **Remove**.
 - o Press **Delete** on your keyboard.



3. You will be prompted to confirm this remove action.



Visits

Recording a Visit: Private Billing

For privately billing, at the conclusion of the consultation, you will be required to record the services offered, ask how the patient will be paying, and if available generate a patient claim.

1. From the Waiting Room, select the patient record.

All	AT	ML	JJ			
Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type
KINDRA, Noah		35 mins	None	AT - Surgery		
BABEL, Todd		35 mins	None	ML - Surgery		
ATHOL, Daphne		34 mins	None	ML - Surgery		
ELISE, Diana		34 mins	Vet Spec...	AT - Surgery		

2. Click **Visit**, or press **F5** on the keyboard.
3. Confirm the consultation details including: time/date, practitioner and location.

Record Visit

File View

Patient name: KINDRA, Noah Seen by: AT Location: Surgery

Consult time: 11:40:09 AM Payer: Mr Noah KINDRA
17 Elisa Gr
Timber Creek NT 0852

Consult date: 4/07/2014

Invoice to: Patient

4. If not selected, choose **Patient** from the **Invoice to** drop-down list. The payer details will appear in associated textbox, as shown above.
5. Add the Service details by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	Text
23	Level B Surgery	\$53.40	\$16.35	Private Fee	0.00	\$0.00	\$53.40	
		\$53.40	\$16.35			\$0.00	\$53.40	

In hospital Apply incentive **Add** **Delete**

6. If appropriate, click **Add** to record any other Items No's to bill.

Tip: As directed by the practitioner, you can adjust the default calculated fee by inserting a different dollar amount. Alternatively select a different Fee Rate from the list available.

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	Text
23	Level B Surgery	\$55.00	\$17.95	Private Fee	0.00	\$0.00	\$55.00	
		\$55.00	\$17.95			\$0.00	\$55.00	

In hospital Apply incentive **Add** **Delete**

7. Select the payment option, either **Pay Now** or **Pay Later**.



Pay Now

1. Select the **Pay Now** option.

2. Ask “How will you pay for today’s consultation?” Based on their payment method, select the type from the list.

3. If a split payment is required, click **Add** to record a second payment type.

Important: If you have recorded a split payment, adjusted the fee, or have amended the receipting amount, ensure that the ‘total amount outstanding’ equals \$0. If there is a discrepancy between the total charged and the receipted amount, the patient will either have an outstanding account, or if paying more, their account will be in credit.

Total amount outstanding: \$13.40

Total amount outstanding: -\$6.60

4. Click **Receipt** to complete the transaction process. A printed receipt will be generated on screen detailing the payment and any outstanding amount.

Note: After reviewing the receipt, if an error was made in recording the consultation or payment details, select Close to return to the Record Visit window.

5. To finalise the visit, click **Save & Print** to generate a Tax Invoice/Receipt.



6. In electing to privately bill, patients registered with Medicare are entitled to receive a rebate for the cost of the consultation. Elect how the patient will receive the refund; either to their EFTPOS card (if integrated with Tyro) or the patient will be issued a cheque.
7. From the New Patient Claim window, elect to **Transmit** the claim or **Store** the patient claim to be send at a later date. If the rebate is not available either to the patient or the item number not claimable (e.g. Travel Vaccine), select **Cancel** to not generate the claim.

8. After recording the visit, the patient will be automatically removed from the Waiting Room list, their linked appointment flagged as 'Gone' and their account list the payment received.
9. To review a history of the patient's payments, open the **Patient Details** window, and select the **Accounts** tab.
10. Select the display options to show the information you are looking for, including:

- o Items billed

Name	Practitioner	Location	Visit Date	Selecte	Entry Date	Item No	Description	Fee Amount	GST	Medicare Expected	Amount Paid	Amount Due	Account No	Receipt No
Noah KINDRA	AT	Surgery	04/07/2014	<input type="checkbox"/>	04/07/2014	23	Level B Surgery	\$53.40	\$0.00	\$37.05	\$53.40	\$0.00	77	54

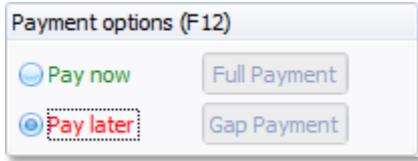
- o Receipts issued.

Receipt No	Receipt Date	Selecte	Entry Date	Amount	Payment Type	Allocation	Details
54	04/07/2014	<input type="checkbox"/>	04/07/2014	\$53.40	Cash		

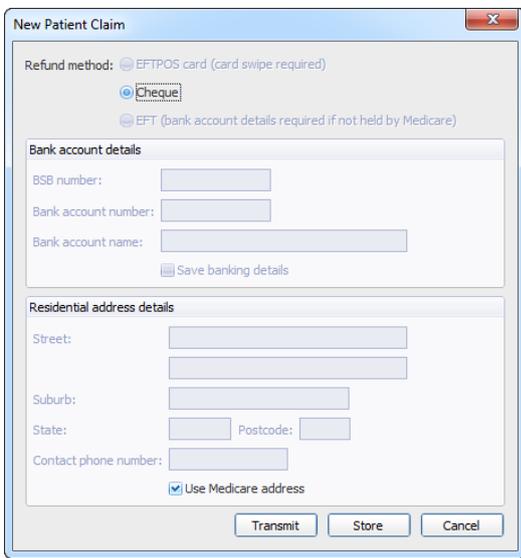
Pay Later

If the patient is unable to pay at the time of the consultation, you can assign the cost of the visit to the patient's account. In charging the account, the money is recorded as owing and is to be settled at a future date.

1. Select the **Pay Later** option.



2. Click **Account** to assign the cost to the patient's account
3. In electing to privately bill, whilst the patient has been offered the option to not pay at this point in time, they are still entitled to claim the Medicare rebate for the cost of the consultation. By deferring the payment, the patient will only be able to receive a cheque from Medicare.
4. From the New Patient Claim window, elect to **Transmit** the claim or **Store** the patient claim to be send at a later date. If the rebate is not available either to the patient or the item number not claimable (e.g. Travel Vaccine), select **Cancel** to not generate the claim.



5. Click **Save & Print** to generate a Tax Invoice. Assign the cost of the consultation to the patient's account.

Mr Noah KINDRA 17 Elisa Gr Timber Creek NT 0852		Issue Date: 4/07/2014 Invoice Number: OAT			
TAX INVOICE					
Service Provider: Dr A Terri-Anne Provider No: 2406901F					
Patient Name	Visit Date	Item No	Description	Fees	GST
KINDRA Noah	4/07/2014	23	Level B Surgery	\$53.40	\$0.00
Total Excluding GST				\$53.40	
Total Including GST				\$53.40	
Previous Amount Owing				\$0.00	
TOTAL OUTSTANDING				\$53.40	

6. After billing, the patient will be automatically removed from the Waiting Room list. Their linked appointment status flagged as 'Gone' and their account charged the cost of the visit.

Recording a Visit: Private Billing (with Tyro - Easyclaim)

Streamline the billing process by integrating a Tyro device into the practice. Tyro is an EFTPOS terminal machine that has the capability of processing patient payments, in addition to providing the option for patients to receive their claim back after payment. The integration with Tyro means the visit payments details are automatically transferred to the device, minimising the risk of entry errors, and assists in receipt reconciliation.

Note: For more information about how to integrate Tyro in MedicalDirector PracSoft, refer to the Tyro User Guide available on the MedicalDirector website.

1. From the Waiting Room, select the patient record.

All AT ML JJ						
Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type
KINDRA, Noah		35 mins	None	AT - Surgery		
BABEL, Todd		35 mins	None	ML - Surgery		
ATHOL, Daphne		34 mins	None	ML - Surgery		
ELISE, Diana		34 mins	Vet Spec...	AT - Surgery		

2. Click **Visit**, or press **F5** on the keyboard.
3. Confirm the consultation details including: time/date, practitioner and location.

Record Visit

File View

Patient name: KINDRA, Noah Seen by: AT Location: Surgery

Consult time: 11:40:09 AM Payer: Mr Noah KINDRA
17 Elisa Gr
Timber Creek NT 0852

Consult date: 4/07/2014

Invoice to: Patient

4. If not selected, choose **Patient** from the **Invoice to** drop-down list. The Payer details will appear in associated textbox, as shown above.
5. Add the Service details by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	Text
23	Level B Surgery	\$53.40	\$16.35	Private Fee	0.00	\$0.00	\$53.40	
		\$53.40	\$16.35			\$0.00	\$53.40	

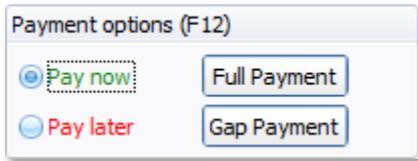
In hospital Apply incentive

6. If appropriate, click **Add** to record any other Item Numbers to bill.
7. Select the payment option, in this instance we will ask for **Pay Now**.

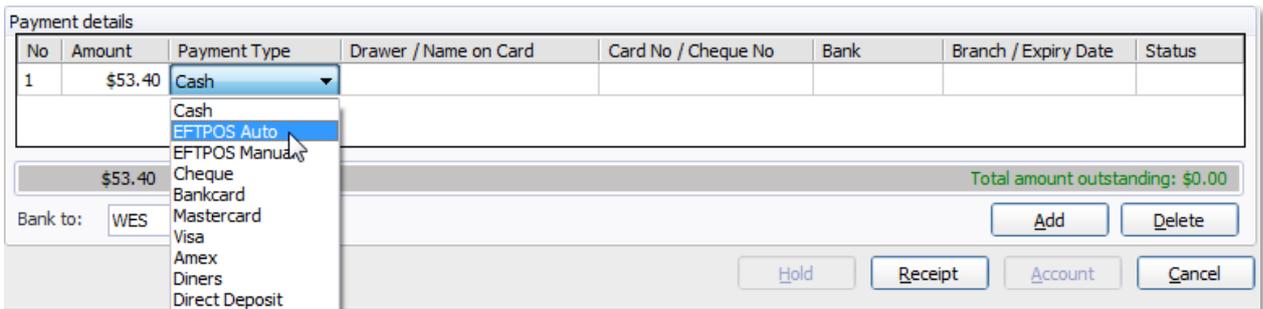


Pay Now

1. Select the Pay Now option.



2. Ask “How will you pay for today’s consultation?” If paying via card, select **EFTPOS Auto** to establish the connection with the Tyro device.



3. Click **Receipt** to start the transaction process.
4. Following the prompts on screen, direct the patient to swipe or insert their card in the Tyro device, to select their bank account type, and to enter their PIN.
5. A printed receipt will be generated on screen detailing the payment and any outstanding amount.
6. Click **Save & Print** to generate a Tax Invoice/Receipt.

Note: After reviewing the receipt, if an error was made in recording the consultation or payment details, select Close to return to the Record Visit window.

7. In electing to privately bill, patients registered with Medicare are entitled to receive a rebate for the cost of the consultation. Elect how the patient will receive the refund; either to their EFTPOS card (credit card is not available to receive funds) or the patient will be issued a cheque.
8. From the New Patient Claim window, elect to **Transmit** the claim or **Store** the claim to be send at a later time that day. If the rebate is not available either to the patient or the item number not claimable (e.g. Travel Vaccine), select **Cancel** to not generate the claim.
9. After billing, the patient will be automatically removed from the Waiting Room list. Their linked appointment status flagged as ‘Gone’ and their account reference the payment received.

Important: It is imperative that you record the visit correctly, the first time. Once the claim has been submitted, the patient is able to receive the rebate via Tyro. To correct an error, you need to contact Medicare immediately to address the issue.



Recording a Visit: Bulk Bill

For practices offering bulk billing, at the conclusion of the consultation you will be required to record the services offered, and submit the claim to Medicare for the practice to get paid.

1. From the Waiting Room, select the patient record.

Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type
KINDRA, Noah		35 mins	None	AT - Surgery		
BABEL, Todd		35 mins	None	ML - Surgery		
ATHOL, Daphne		34 mins	None	ML - Surgery		
ELISE, Diana		34 mins	Vet Speci...	AT - Surgery		

2. Click **Visit**, or press **F5** on the keyboard.
3. Confirm the consultation details including: time/date, practitioner and location.

Record Visit X

File View

Patient name: Seen by: Location:

Consult time:

Consult date:

Invoice to:

4. If not selected, choose **Bulk Bill** from the **Invoice to** drop-down list.
5. Add the Service details by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Text
23	Level B Surgery	\$37.05	\$0.00	Schedule Fee	0.00	\$0.00	
		\$37.05	\$0.00			\$0.00	

In hospital Apply incentive

6. If appropriate, click **Add** to record any other Item Numbers to claim.

Note: If the practitioner is registered to receive the Medicare Plus or Medicare Plus – Rural incentive payment, the corresponding item number will be automatically applied to the visit where applicable.

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Text
23	Level B Surgery	\$37.05	\$0.00	Schedule Fee	0.00	\$0.00	
10990	Bulk-Billing Incentive - Afte...	\$6.15	\$0.00	Rebate 85	0.00	\$0.00	
		\$43.20	\$0.00			\$0.00	

In hospital Apply incentive

7. Click **Voucher** to print a Bulk Bill Assignment Advice (DB4 form).

MEDICARE - ONLINE CLAIMING

BULK BILL ASSIGNMENT ADVICE

(This form is the approved form as prescribed under Section 20A of the Health Insurance Act 1973)

Bulk Bill Claim for assessment by Medicare Australia
Please retain for your records

DB4
Printed From PracSoft3

Location ID: HSS00000 **Reference:** HSS0000004072014125800

Servicing Location: HCN Demo - David Harris
4/201 Pacific Highway
Timber Creek
NT 0852

Patient Details
Medicare No: 3500 26512 1
Ref No: 1
First Name, Initial, Surname: Todd BABEL
Date of Birth: 08/02/1974
Telephone (B/H): 9345 6789 9123 4567
Residential Address: 2 Kennedy Rd
ARTARMON NSW 2084

This Bulk Bill claim has been: **STORED FOR LATER TRANSMISSION**

Name of practitioner who Rendered the Service: Dr. M Lennard
Provider No: 2406561B **Payee Provider:**
Referring/Requesting practitioner's name: **Payee No:**
Provider No: **ACRF:**
Date of Referral: **LSPN:**
Referral Type:
Period of Referral:

Date of Service: 4/07/2014 12:56 pm

Description of Service	Item No.	Benefit Assigned	Text
Level B Surgery	23	\$ 37.05	

Declaration/Authorisation

Privacy Note: The information provided will be used to assess any benefit payable for the services rendered and to facilitate the proper administration of government health programs, and may be used to update enrolment records. Its collection is authorised by provisions of the *Health Insurance Act 1973* and/or *Dental Benefits Act 2008*. The information may be disclosed to the Department of Health and Ageing, Centrelink, other relevant agencies or to a person in the medical/dental practice associated with this claim, or as authorised or required by law.

To be completed by the person assigning benefits for the services stated on this form.

I assign my right to benefits to the Practitioner who rendered the services.
or
 I offer to assign my right to benefits to the approved Pathology Practitioner who will render the requested pathology services.

..... 04/07/2014
Patient Signature Date

8. After billing, the patient will be automatically removed from the Waiting Room list and their linked appointment status flagged as 'Gone'.

Important: For the practice to receive the money for the services offered, all bulk billing vouchers need to be processed as a batch, prepared, and then transmitted to Medicare. For more information about this task refer to Online Claiming in the MedicalDirector PracSoft Help.



Recording a Visit: Bulk Bill (with Tyro –Easyclaim)

For practices bulk billing, at the conclusion of the consultation you will be required to record the services offered and submit the claim to Medicare.

Note: For more information about how to integrate Tyro in MedicalDirector PracSoft, refer to the Tyro User Guide available on the MedicalDirector website.

1. From the Waiting Room, select the patient record.

Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type
KINDRA, Noah		35 mins	None	AT - Surgery		
BABEL, Todd		35 mins	None	ML - Surgery		
ATHOL, Daphne		34 mins	None	ML - Surgery		
ELISE, Diana		34 mins	Vet Speci...	AT - Surgery		

2. Click **Visit**, or press **F5** on the keyboard.
3. Confirm the consultation details including time/date, practitioner, and location.
4. If not selected, choose **Bulk Bill** from the **Invoice to** drop-down list.

Important: When integrating with a Tyro device, the bulk bill claim will be sent instantly to Medicare for processing by default. If the practice wants to delay this transmission, instead opting to batch the bulk bill claim at the end of the day, it is vital that you select the **Retain claim for checking** option from the Record Visit window.

Invoice to: Retain claim for checking 

5. Add the Service details by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Text
23	Level B Surgery	\$37.05	\$0.00	Schedule Fee	0.00	\$0.00	
		\$37.05	\$0.00			\$0.00	

In hospital Apply incentive

6. If appropriate, click **Add** to record any other Item Numbers to claim.
7. Click **Voucher**. The patient will be prompted on the Tyro device to ‘assign the benefit’ confirming the service.
8. After billing, the patient will be automatically removed from the Waiting Room list and their linked appointment status flagged as ‘Gone’.

Important: After submitting the bulk bill voucher. If an error in the billing is identified, you need to contact Medicare immediately to have the voucher corrected before it's processed and paid.



Recording a Visit: Veterans' Affairs

Similar to Bulk Billing, patients registered with the Department of Veterans' Affairs are able to claim for medical expenses. The service offered and billable to DVA is based on the patient's concession status; either Gold or White.

1. From the Waiting Room, select the patient record

Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type
KINDRA, Noah		35 mins	None	AT - Surgery		
BABEL, Todd		35 mins	None	ML - Surgery		
ATHOL, Daphne		34 mins	None	ML - Surgery		
ELISE, Diana		34 mins	Vet Spec...	AT - Surgery		

2. Click **Visit**, or press **F5** on the keyboard.
3. If not selected, choose **Vet Affairs** from the **Invoice to** drop-down list.
4. Confirm the consultation details including time/date, practitioner, and location.

5. Specify the clinical services provided, including **Authorisation**, **Clinical condition type**, and **Location** of consultation.

6. Add the Service details by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Text
23	Level B Surgery	\$41.75	\$0.00	Veteran L...	0.00	\$0.00	
10990	Bulk-Billing Incentive - Afte...	\$7.05	\$0.00	Veteran L...	0.00	\$0.00	
		\$48.80	\$0.00			\$0.00	

In hospital Apply incentive

7. If appropriate, click **Add** to record any other Item Numbers to claim.
8. Click **Voucher** to print a DVA Health Practitioner Service Voucher (D1216S form).

Department of Veterans' Affairs **D1216S**
Printed From PracSoft3

Health Practitioner Service Voucher

Location ID: HSS00000 Reference: HSS0000004072014122400
 Servicing Location: HCN Demo - David Harris
 4/201 Pacific Highway
 Timber Creek
 NT 0852

Patient Details
 DVA File No: QX901491
 First Name, Initial, Surname: Diana ELISE
 Date of Birth: 05/07/1950
 Telephone (B/H):
 Residential Address: 25 Kirwin Ave
 Broadbeach Waters QLD 4218

This DVA claim has been: **STORED FOR LATER TRANSMISSION**

Name of practitioner who Rendered the Service: Dr A Terri-Anne Payee Provider:
 Provider No: 2406901F Payee No:

Referring/Requesting practitioner's name: ACRF:
 Provider No: Treatment Location: Rooms
 Date of Referral: Name of Hospital or Nursing Home (if applicable):
 Referral Type: KMs Travelled:
 Period of Referral: Condition treated (White card holders and emergencies only):

Date of Service: 4/07/2014 12:24 pm

Description of Service	Item No.	Amount Claimed	Text
Level B Surgery	23	\$41.75	
Bulk-Billing Incentive - After-hours service in eligible areas	10990	\$7.05	

PRIVACY NOTE: The information sought on this form is to enable service verification and claim processing. This information will be disclosed to Medicare Australia to process the payment.

I certify that I have received the services described on this voucher, or, the Practitioner has requested Pathology tests for me. I am not entitled to claim third party or worker's compensation for these services.

..... 04/07/2014
 Patient Signature Date

or I certify - That the patient is unable to sign The service is associated with an emergency

9. After billing, the patient will be automatically removed from the Waiting Room list. Their appointment status flagged as 'Gone' and the visit recorded within the patient's record.

Important: For the practice to receive the money for the services offered, all DVA vouchers need to be processed as a batch, prepared, and then transmitted to Medicare. For more information about this task refer to Online Claiming - Veterans.

Recording a Visit: Other (Institutional)

Integral to institutional billing, is nominating if the service relates to workers compensation claim or a series of 3rd party visits that relate to a workplace promotion (e.g. influenza vaccination, etc.)

Workers Compensation

1. From the Waiting Room, select the patient record.

Name	Chart	Time	Concession	Practitioner	Items To Bill	Billing Type
KINDRA, Noah		35 mins	None	AT - Surgery		
BABEL, Todd		35 mins	None	ML - Surgery		
ATHOL, Daphne		34 mins	None	ML - Surgery		
ELISE, Diana		34 mins	Vet Speci...	AT - Surgery		

2. Click **Visit**, or press **F5** on the keyboard.
3. If not selected, choose **Other** from the **Invoice to** drop-down list. The Select Institutional Payer window appears.
4. Locate the Institutional payer of the consultation, click **Select**.

Select Institutional Payer X

Show inactive:

Search text: Search on: Code ▼ Search

Code	Name	Contact	Phone	Address	Suburb	Notes
ALL	Allianz Insurance		1300 130665	Level 12	Sydney	
AMP	AMP		0299066600	AMP Society	Sydney	
QBE	Qbe Insurance		02 9878 4544	82 Pitt Street	Sydney	

Max. records: Select Print Add Edit Delete Close

*Tip: If the Institution is not listed, tick the **Show Inactive** check box to include inactive institutions. After confirming that the institution is not listed, click **Add** to record a new institutional payer.*

5. Confirm the consultation details including: time/date, practitioner and location, and add the Reference details as supplied by the institution.

Record Visit X

File View

Patient name: Seen by: ML ▼ Location: Surgery ▼

Consult time: Payer:

Allianz Insurance
Level 12
2 Market St
Sydney NSW 2000

Consult date: 4/07/2014 ▼

Invoice to: Other ▼

Institution: ALL ▼ ... Reference: A234656564 ▼

6. Add the Service details by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	Text
AA020	Level B Consultation	\$71.00	\$71.00	AMA Fee	0.00	\$0.00	\$71.00	

\$71.00 \$71.00 \$0.00 \$71.00

In hospital Apply incentive

Important: Every state/territory manages workers' compensation differently. Refer to your state's workers' compensation website for further details about item numbers, chargeable amounts and start date to billing period.

7. If appropriate, click **Add** to record any other Item Numbers to claim.

Service details

Item	Description	Fee GST Ind	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	Text
AA020	Level B Consultation	<input type="checkbox"/>	\$71.00	\$71.00	AMA Fee	0.00	\$0.00	\$71.00	
WC...	Other Medical Items	<input checked="" type="checkbox"/>	\$0.00	\$0.00	AMA Fee	10.00	\$0.00	\$0.00	

\$71.00 \$71.00 \$0.00 \$71.00

In hospital Apply incentive

8. Where appropriate, enter the **Fee** amount to reflect the Item to be billed (e.g. cost price items). Note, this amount is GST Inclusive. Press the **Tab** key to automatically calculate the GST Amount.

Service details

Item	Description	Fee GST Ind	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	Text
AA020	Level B Consultation	<input type="checkbox"/>	\$71.00	\$71.00	AMA Fee	0.00	\$0.00	\$71.00	
WC...	Other Medical Items	<input checked="" type="checkbox"/>	\$180.00	\$180.00	AMA Fee	10.00	\$16.36	\$180.00	

\$251.00 \$251.00 \$16.36 \$251.00

In hospital Apply incentive

Tip: When entering an item number, if the **Fee GST Incl** is ticked, the amount entered is GST inclusive. If however you are entering the GST exclusive amount, you can use the Record Visit window to calculate the new GST inclusive amount.

- In the GST Rate, replace the percentage with a zero rate.
- Know that the line is GST Exclusive, re-Enter the fee amount.
- To recalculate the GST Inclusive amount. Re-enter the GST percentage in the GST Rate column. This will automatically update the fee to now be GST Inclusive.

9. As you have nominated an Institutional payer, select the **Pay Later** option.

Payment options (F12)

Pay now

Pay later



10. Click **Account** to assign the cost to the institution’s account.

11. Click **Save & Print** to generate the Tax Invoice.

Allianz Insurance Level 12 2 Market St Sydney NSW 2000			Issue Date: 4/07/2014 Invoice Number: OAT		
TAX INVOICE					
Reference Details: A234656564					
Service Provider: Dr. M Lennard Provider No: 2406561B					
Patient Name	Visit Date	Item No	Description	Fees	GST
ATHOLDaphne	4/07/2014	AA020	Level B Consultation	\$71.00	\$0.00
ATHOLDaphne	4/07/2014	WCO004	Other Medical Items	\$163.64	\$16.36
Total Excluding GST				\$234.64	
Total Including GST				\$251.00	
TOTAL OUTSTANDING				\$251.00	

Third-Party Payer

For practices that provide clinical services on behalf of a third-party payer, there are two techniques available to record the visit, and issue a tax invoice statement;

- o You can adopt the workers’ compensation model as outlined above, adding the third-party payer as an Institutional payer.
- o Alternatively you can add the organisation as a patient. Then, from within the one Record Visit window, add the multiple services performing, using the service text description to identify the employee name.

1. From the Waiting Room, add the organisation
2. Select the patient record.
3. Click **Visit**, or press **F5** on the keyboard.
4. If not selected, choose **Other** from the **Invoice to** drop-down list. The **Select Institutional Payer** window appears.
5. Locate the Institutional payer of the consultation, click **Select**.

*Tip: If the Institution is not listed, tick the **Show Inactive** check box to include inactive institutions. After confirming that the institution is not listed, click **Add** to record a new institutional payer.*

6. Confirm the consultation details including time/date, practitioner, and location, and add the Reference details as supplied by the institution.
7. Add the Service details by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.

Important: Every state/territory manages workers’ compensation differently. Refer to your state’s workers’ compensation website for further details about item numbers, chargeable amounts and start date to billing period.

8. If appropriate, click **Add** to record another Item Number to charge.

Where appropriate, enter the **Fee** amount to reflect the Item to be billed (e.g. cost price items). Note this amount is GST Inclusive. Press the **Tab** key to automatically calculate the GST Amount.

Tip: When entering an item number, if the **Fee GST Incl** is ticked, the amount entered is GST inclusive. If however you are entering the GST exclusive amount, you can use the record visit screen to calculate the new GST inclusive amount.

- a. In the GST Rate, replace the percentage with a zero rate.
- b. Know that the line is GST Exclusive, re-Enter the fee amount.
- c. To recalculate the GST Inclusive amount. Re-enter the GST percentage in the GST Rate column. This will automatically update the fee to now be GST Inclusive.

9. As you have nominated Institutional payer, select the **Pay Later** option.
10. Click **Account** to assign the cost to the institution’s account.
11. Click **Save & Print** to generate the Tax Invoice.
12. Click **Save & Print** to generate the Tax Invoice.

Recording Visits: Tips

Selecting Item Numbers

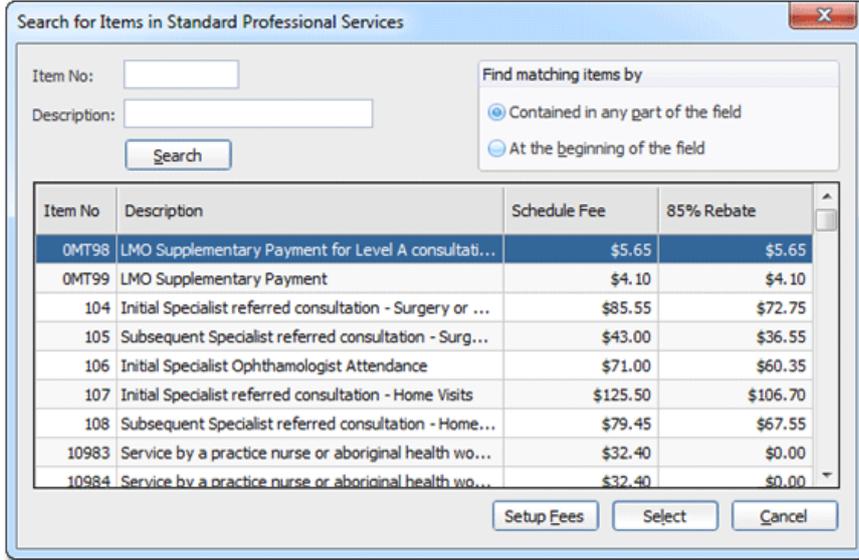
Item Numbers are Integral to billing. Over time you will become familiar with the standard consultation services your practitioner provides. As you start out, the ideal is to get the details recorded correctly the first time, without the need to contact Medicare if an error was made. To assist you in this task:

1. Encourage your practitioners to record what items to bill within MedicalDirector Clinical. This functionality allows for quick communication between the practitioner and the front desk. Within MedicalDirector Clinical **Progress Notes** module there is a **Medicare** function that allows the practitioner to record which services were performed. Their selection is then automatically synced with the MedicalDirector PracSoft Waiting Room window.

Item	Description
23	Professional attendance by a general practitioner at consulting rooms (not being a service to which any other item in this table applies), lasting less than 20 minutes and including any of the following that are clinically relevant: (a) taking a patient history; (b) performing a clinical examination; (c) arranging any necessary investigation; (d) implementing a management plan; (e) providing appropriate preventive health care for 1
24	Professional attendance by a general practitioner (not being an attendant)
24/1	Item 24 (1 patient)
24/2	Item 24 (2 patients)
24/3	Item 24 (3 patients)
24/4	Item 24 (4 patients)

Note: The practitioner can also reference any additional information within the Notes section, including their preference to Privately Bill or Bulk Bill. It can also be used to relay a message relating to when the patient requires another appointment, or flag the visit as an ‘not normal after-care’.

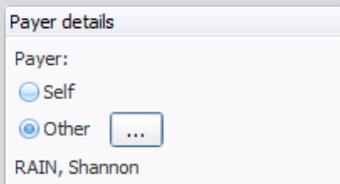
- If you are required to locate a specific item number, use the search function **Ctrl S** within the Record Visit window to assist you in finding the item number to bill.



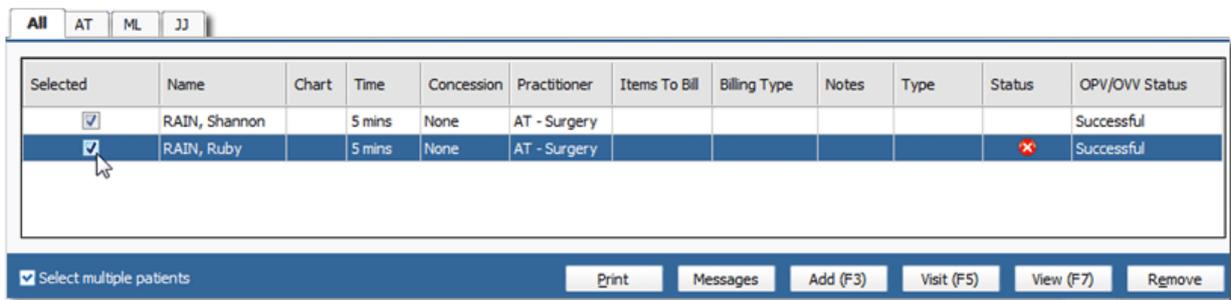
Recording Multiple Patient Visit: Private Account

If a parent makes a booking for more than one family dependent, when privately billing you can combine each visit into a single payment.

Note: In order to combine multiple visits into a single payment, you must first indicate the patient's primary account payer with their record. Under Payment Details, select Other to nominate another patient.



- From the Waiting Room, tick **Select Multiple Patients** (displayed bottom left corner).
- Via the Selected check box, select the patients you wish to combine into a single visit payment.



- Click **Visit**, or press **F5** on the keyboard.
- Confirm the consultation details of the first patient, including time/date, practitioner, and location.



5. Add the Service details for the first patient by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.

Service details

Patient	Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	T
Shannon RAIN	23	Level B Surgery	\$53.40	\$16.35	Private Fee	0.00	\$0.00	\$53.40	

In hospital Apply incentive

6. If appropriate, click **Add** to record any other Item Numbers to bill for the first patient.
7. Click **Next Patient**.
8. For the next patient, adjust the service details if required. Insert the second Item No. Press the **Tab** key to record the services provided and to calculate the fee amount.

Service details

Patient	Practitioner	Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation
Shannon RAIN	AT-Surgery	23	Level B Surgery	\$53.40	\$16.35	Private Fee	0.00	\$0.00	
Ruby RAIN	AT-Surgery	23	Level B Surgery	\$53.40	\$16.35	Private Fee	0.00	\$0.00	

In hospital Apply incentive

9. If appropriate, click **Add** to record any other Item Numbers to bill for the second patient.
10. Repeat Steps 8 to 9 until the visit for each patient to be billed has been recorded.
11. Select the payment option; either **Pay Now** or **Pay Later**

Note: For more-detailed instructions, including payment options and submitting patient claims, refer to the steps outlined under Private Billing.

Important: In selecting Next Patient you are unable to return to the previous patient/s to add any additional item numbers. If you need to add an extra service for the first patient, select Cancel to re-enter the details.

Recording a Non Waiting Room Visit

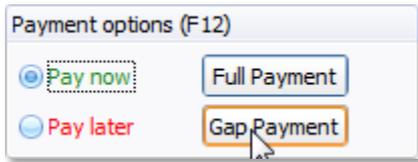
If the Practitioner provides consultation services away from the practice location (e.g. afterhours home visit, hospital visit, etc.) you can record the visit without first having to add the patient to the Appointment Book or Waiting Room.

1. From the menu, select **Accounts > Add Visit**. Shortcut **Shift F5**
2. Locate and select the patient you wish to record a visit for.
3. Within the Record Visit window, select the consultation details including time/date, practitioner, and location.
4. Record the visit as per standard methods.

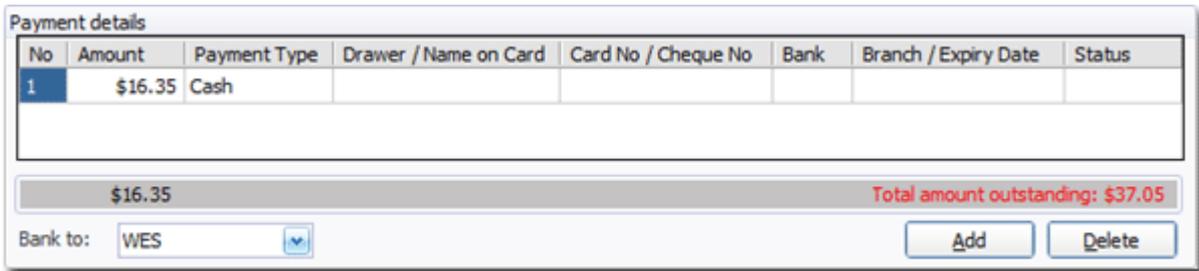
Gap Payments

If the patient has insufficient funds to pay for the consultation, the practice can offer the patient the ability to pay the gap only. The gap amount is the difference between the practice fee and the Medicare schedule fee. The outstanding amount will be settled by Medicare in the form of a cheque issued to the Practitioner, sent to the *patient's* address; it is the responsibility of the patient to bring the cheque along to the practice to settle the account. If the patient fails to present within 90 days, the money is made available to the practice via from Medicare.

1. Within the Record Visit window, choose **Patient** from the **Invoice to** drop-down list.
2. Add the Service details by inserting the Item No, and then pressing the **Tab** key to populate the service description and calculate the fee amount.
3. Select the payment option, **Pay Now**.
4. Click **Gap Payment**

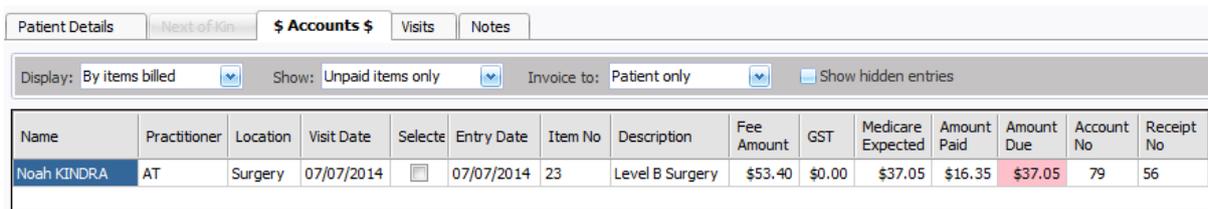


5. Ask "How will you pay for today's consultation?" Based on their payment method, select the type from the list.



Note: The outstanding amount highlighted in red will be added to the patient's account until it is settled by Medicare.

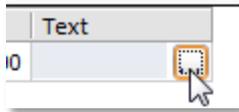
6. Click **Receipt** to complete the transaction process.
7. To review the patient's accounts and payments, open the Patient Details window, and select the **Accounts** tab.
8. Select the display options to show the information you are looking for.



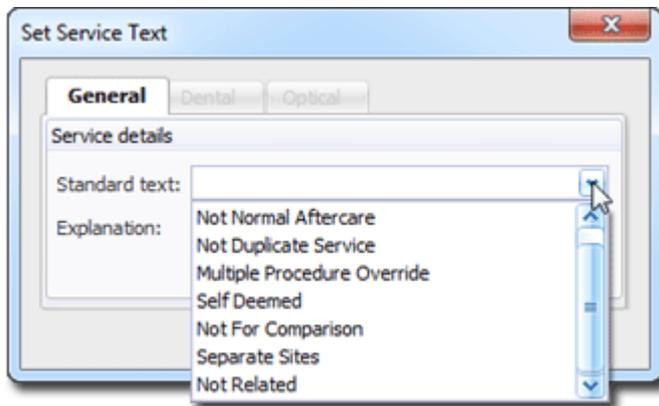
Service Text

From time-to-time you will be required to provide additional supporting evidence about the consultation before a claim will be paid. Based on Medicare rules, it will not pay a practitioner who has seen a patient twice on the same day, billing the same item number; it is believed that the first visit should encompass the whole service provided. If the two consultations were in fact isolated, to ensure that the practitioner is able to receive the money for the second consultation, you need to record the supporting evidence explaining why the multiple visits are isolated. Likewise, you cannot bill the same item number in a visit without providing an explanation.

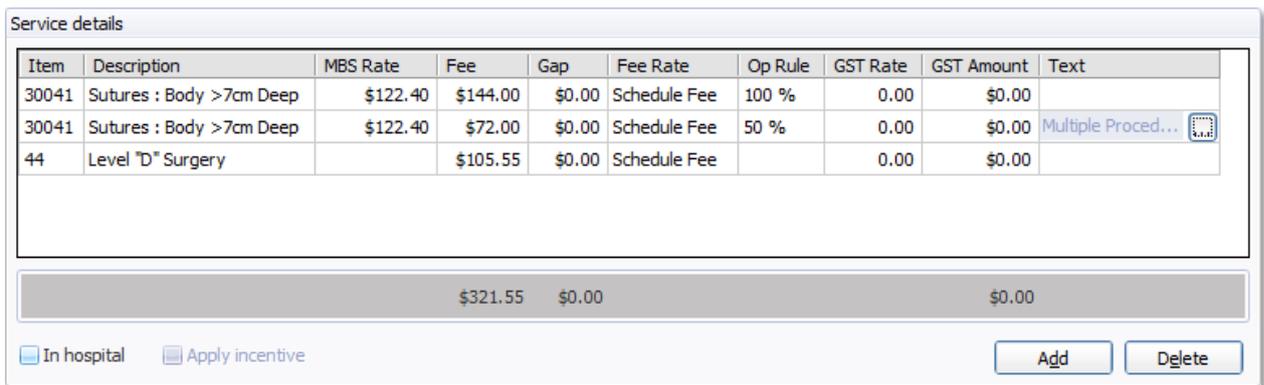
1. From the Record Visit window, select the Item No within the service details.
2. Locate the **Text** column, and then click the  button.



3. Select the **Standard Text** that supports your claim.

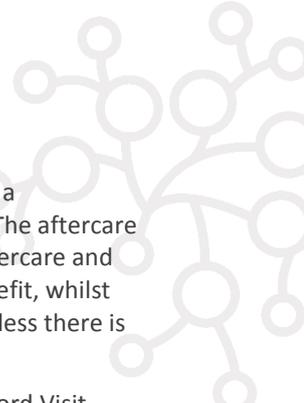


4. Enter an **Explanation**, outlining the reasons why you are claiming for the services provided.
5. Click **Save** to attach the information to the visit.



6. Continue recording the visit details, and when completed, transmit the claim as per your practice’s preference.

Note: By entering a service text explanation to the visit, the claim will be manually reviewed by Medicare before the claim is paid.



Aftercare and Not Normal Aftercare

Aftercare is the treatment of a patient following an operation, the services is provided by or on behalf of a practitioner, and includes any consultation for the purposes of post-operative treatment of the patient. The aftercare services include wound dressings, and final check or examination. It is essential to correctly record all aftercare and not normal aftercare consultations, specifically because aftercare services do not attract a Medicare benefit, whilst non-aftercare services do. Medicare will usually reject claims for consultations in the aftercare period unless there is sufficient information to indicate that the service was not for routine aftercare.

- If the consultation forms part of an aftercare service, the visit is charged to the patient. From the Record Visit window tick the **Aftercare** check box. As the original hospital procedure covers the cost of the aftercare service, the visit attracts a zero amount chargeable. With a zero amount, select **Cancel** to not generate the patient claim.
- If the consultation is in fact separate from the operation, therefore a Not Normal Aftercare service. Use the Service Text field to record the Service Type as Not-Normal Aftercare, and enter an explanation about the service provided.

Important: If a patient had a procedure performed by another medical practitioner and the service you provide would be considered aftercare, you are not entitled to Medicare benefits for the service. You should advise the patient that this principle applies whether the patient elects to see you for the service or the medical practitioner who performed the procedure. You may elect to privately bill the patient for the service you provide.

On Hold

Occasionally you may find that you do not have all the information available to record a visit. Instead of cancelling and losing the details recorded, you can elect to place the visit on hold. This will allow you to complete the task once you have all the information required.

Examples of visits to place on hold include:

- A newborn receiving their two month vaccine, where the parents have not been issued a new Medicare Card with the child’s details recorded. You can record the details about the visit including: the date; service details; and practitioner. Once the Medicare number is known and entered within the patient’s record, return to the on hold visit to submit the claim.
- You may be required to wait for confirmation of the item number to bill. Some item numbers, including biopsy, vary based on the results of the pathology investigation. As a result, the visit is placed on hold until the practitioner receives the results back from a laboratory. With the information available, we can enter the item number to include in the visit.

Multiple Operation Rule

When recording a visit where two or more procedures (other than amputations) are performed on a patient on the one occasion, the fees are calculated on a sliding scale; 100% for the item with the highest schedule fee, plus 50% for the item with the second highest schedule fee, plus 25% each other items. Before applying the Multiple Operation Rule, you need to configure your fee’s list, specifying what Item Numbers this rule applies too.

From the menu, select **Admin > Fees**. Within the fee listing, specify what Item Numbers have the Multiple Services rule applied. Refer to the MBS Online for confirmation on the Therapeutic Procedures.

Item No	Description	Op Rule
30003	Burns dressing	<input checked="" type="checkbox"/>
30006	Burns dressing Extensive	<input checked="" type="checkbox"/>
30026	Sutures : Body <7cm Superficial	<input checked="" type="checkbox"/>
30029	Sutures : Body <7cm Deep	<input checked="" type="checkbox"/>
30032	Sutures : Face <7cm Superficial	<input checked="" type="checkbox"/>
30035	Sutures : Face <7cm Deep	<input checked="" type="checkbox"/>
30038	Sutures : Body >7cm Superficial	<input checked="" type="checkbox"/>
30041	Sutures : Body >7cm Deep	<input checked="" type="checkbox"/>

The Op Rule will automatically apply to the items recorded within the visit.

Item	Description	MBS Rate	Fee	Gap	Fee Rate	Op Rule	GST Rate	GST Amount	Payment allocation	Text
47561	# Tibia	\$272.95	\$272.95	\$68.20	Schedule Fee	100 %	0.00	\$0.00	\$272.95	
47918	IGT Excision Nail Bed	\$235.50	\$117.75	\$29.43	Schedule Fee	50 %	0.00	\$0.00	\$117.75	
47672	# Phalanx of Toe(1), by ...	\$112.85	\$28.21	\$7.05	Schedule Fee	25 %	0.00	\$0.00	\$28.21	

In hospital Apply incentive Provider No(Facility ID):

Tip: Refer to MBS Online <http://www9.health.gov.au/mbs/> to confirm what item numbers are subject to the Multiple Services Rule.

Editing a Visit: Bulk Bill

In recording a bulk bill visit, if you elect to ‘batch the voucher’, any errors that are identified can easily be corrected before you submit the claim to Medicare. There is a small window of opportunity to correct the error within the patient’s record before the claim is batched.

- As the patient is no longer in the Waiting Room window, click the **Patient Details View**  button to open the **Patient Details** window.
- Insert the patient’s name in the format of *Surname, First name*.

Patient name:

- Press the **Enter** key.
- Within the patient’s record, select the **Visits** tab. Select the visit you wish to edit.

Visit Date	Practitioner	Location	Item No	Status	Description	Held
04/07/2014	ML	Surgery	23	Bulk Bill	Level B Surgery	
20/03/2014	AT	Surgery	23	T0016	Level B Surgery	
		Surgerv	10990	T0016	Bulk-Billing Incenti...	

Important: After batching a Bulk Bill claim, the Edit option within the patient’s record is no longer available. The final option to Edit the claim is within the processing function within the Online Claiming window. For more information refer to Online Claiming.

Tip: The Edit function is only available where the visit status displays Bulk Bill.

5. Click **Edit**. The **Record Visit** window opens.

Record Visit

File View

Patient name: BABEL, Todd Seen by: ML Location: Surgery

Consult time: 11:52:30 AM

Consult date: 4/07/2014

Invoice to: Bulk Bill Retain claim for checking

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Text
36	Level "C" Surgery	\$71.70	\$0.00	Schedule Fee	0.00	\$0.00	

\$71.70 \$0.00 \$0.00

In hospital Apply incentive

Payment options (F12) **Visit options** **Print options**

Pay now
 Pay later

Remove from Waiting Room Non visit
 Non patient account Aftercare

Print voucher Print preview
 Print PC1 Copies: 1

6. Make any corrections to the information as necessary (e.g. change the practitioner, amend the Items to claim, include a service text statement, or record the hospital Provider Number).
7. Deselect **Print Voucher** to not reprint out the DB4 form. To finish click **Claim** to update the visit.

Accounts

Record Receipt of Payment

Most patient visits are paid for at the time of consultation. However, there will be times when the patient is unable to pay at the time. As a result, the practice can offer the option to add the visit to the patient’s account. When the patient returns or sends you the money, you record the payment against their owing or outstanding account.

1. In the Waiting Room, click the **Payment/Receipt**  button, or select **Accounts > Receipts/Payments**.
2. Indicate whether the payment is from a **Patient** or **Institution**. In these steps, ‘Private Patient’ is selected.
3. Within **Search Text**, enter the patient’s name.

4. Click **Search**. You may be presented with the Select Patient window if there are multiple matches, or the search could not find an exact match. After locating the patient, the **Receipt** window will appear.
5. Confirm the receipt details, including Date, Bank to, and the Receipt For.

6. Using the payment allocation details, match which Service Items are being paid for with this payment. Locate the Service Item you wish to allocate payment to, and;
 - o Double-click the Payment Allocation field for that item to allocate the full value of that item, or
 - o Single-click the Payment Allocation field for that item and type a dollar value that you wish to allocate.

Payment allocation											
No	Patient	Visit Date	User ID	Item No	Description	Fee	GST	Paid	Amount Due	Payment Allocation	Account No
1	KINDRA, Noah	04/07/2014	AT	23	Level B Surgery	\$53.40	\$0.00	\$0.00	\$53.40	\$53.40	80
									\$0.00	\$53.40	\$53.40

7. Once you have allocated the money to the visit, the next step is to record the payment details.

- o Amount received
- o Payment Type
- o Drawer / Name on Card
- o Card No / Cheque Number
- o Bank
- o Branch
- o Branch / Expiry Date

Tip: Double-click the Amount value to automatically calculate the visit fees within the payment details.

- 8. To process the payment(s), click **Receipt**. If you chose to make any payments via EFTPOS AUTO (linked with Tyro) you will be prompted accordingly.
- 9. If you chose to view a preview of the receipt, click **Save** or **Save & Print** to proceed.

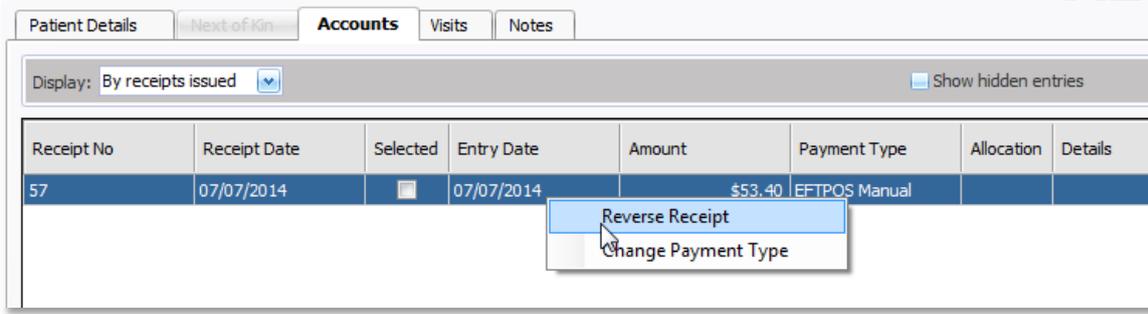
Reverse Receipt

If a receipting error occurs when recording the amount of money paid, you must first reverse the issued receipt and then re-enter the new payment details.

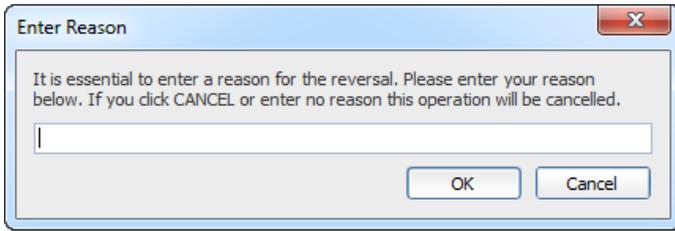
*Important: If a new patient claim was created, you will not be able to proceed with the receipt reversal until the claim has been deleted. Click **No**, to first perform a same-day delete.*

1. Open the patient's record; click the **Patient Details View**  button to open the **Patient Details** window.
2. Insert the patient's name in the format of *Surname, First name*. Press the **Enter** key.
3. Within the patient's record, select the **Accounts** tab.
4. From the **Display** dropdown, select to view '**By receipts issued**', as shown.

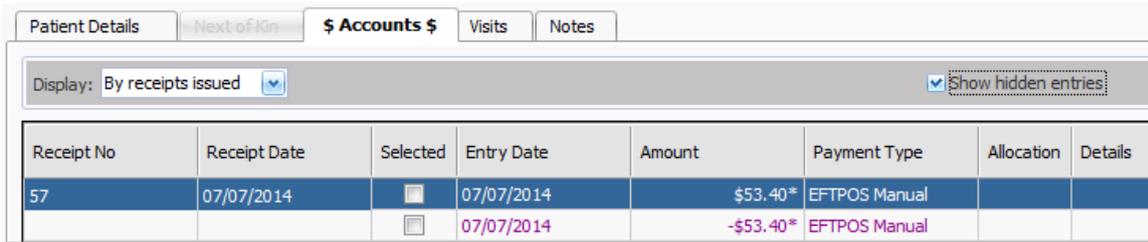
- Right-click the receipt line item, select **'Reverse Receipt'**.



- You will be prompted to confirm this action. Read the prompt carefully. Click **Yes** to reverse the receipt.
- You will be prompted to enter a reason why you are reversing this receipt. Click **OK** to record the reversal of the account. The patient's account will return to outstanding.



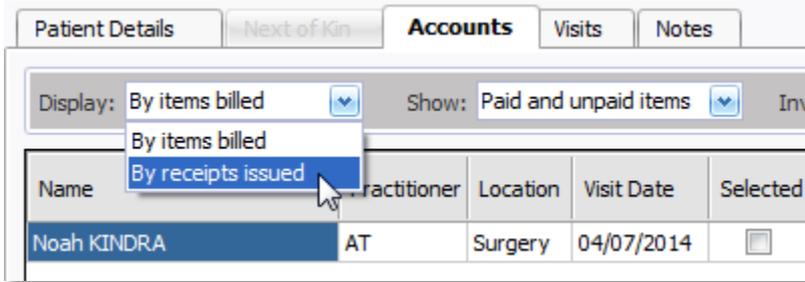
- Review the receipt reversal, tick **Show hidden entries**.



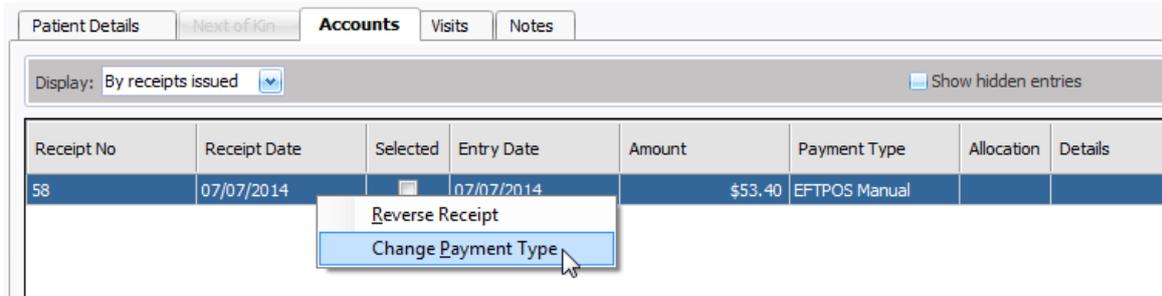
Adjust Receipt Payment Type

If a receipting error occurs when recording the patient’s payment type, you must correct the payment type before processing the payment for banking.

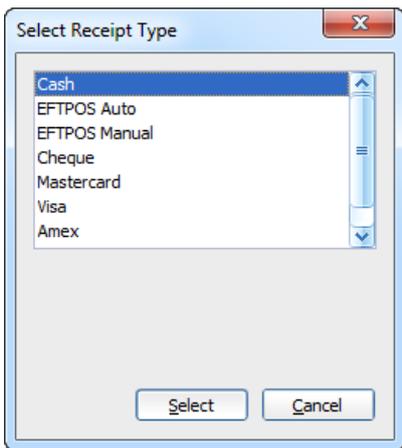
1. Open the patient’s record; click the **Patient Details View**  button to open the **Patient Details** window.
2. Insert the patient’s name in the format of *Surname, First name*. Press the **Enter** key.
3. Within the patient’s record, select the **Accounts** tab.
4. From the **Display** dropdown, select to view ‘**By receipts issued**’, as shown.



5. Right-click the value in the Payment Type column, and select to ‘*Change Payment Type*’.



6. From the list, select the new payment type. As directed, insert the new payment details.

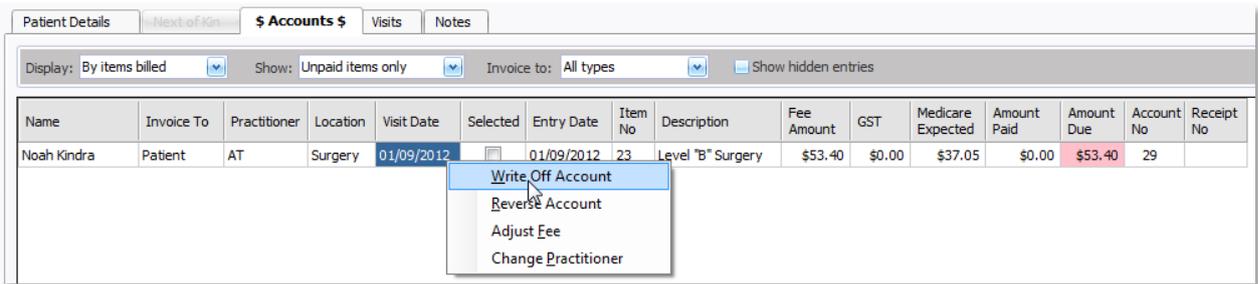
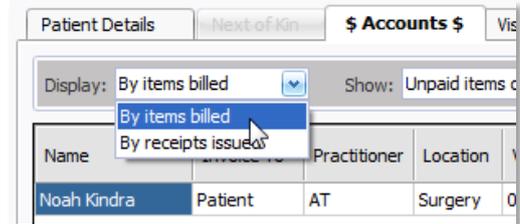


7. Click **Select**. You will be prompted to confirm this action.
8. From the warning prompt, click **Yes** to confirm the change of payment methods.

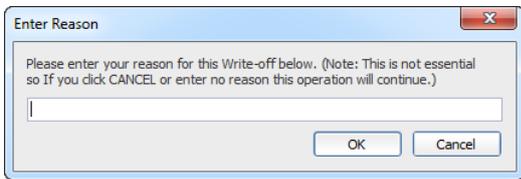
Write-Off Account

To be performed in discussion with the practice owner/s. If you believe the account will never be paid in full, you can determine to write-off the money owing.

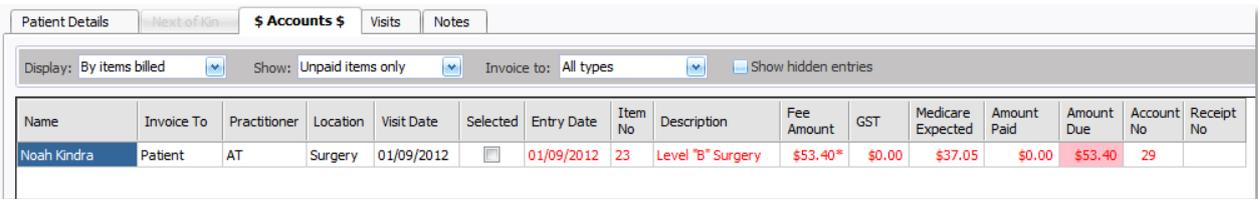
1. Open the patient's record; click the **Patient Details View**  button to open the **Patient Details** window.
2. Insert the patient's name in the format of *Surname, First name*. Press the **Enter** key.
3. Within the patient's record, select the **Accounts** tab.
4. From the **Display** dropdown, select to view 'By items billed', as shown.
5. From the **Show** dropdown list, select to view **Unpaid items only**.
6. Right-click the account line item to adjust, select to **Write Off Account**.



7. You will be prompted to confirm this action. Read the prompt carefully. Click **Yes** to write-off the amount owing.
8. You will be prompted to enter a reason why the account is being written-off.

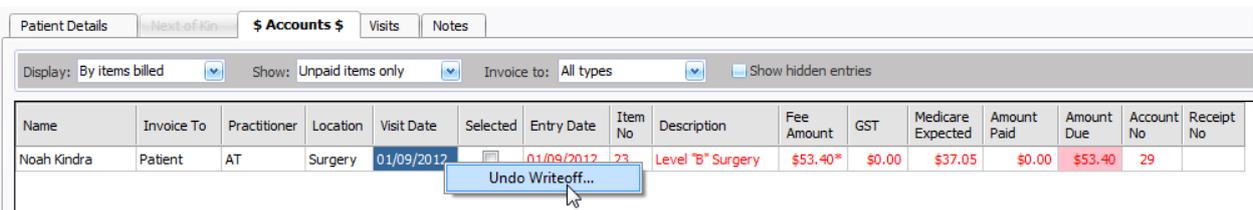


9. Click **OK**. The patient's record now displays the written-off account in **Red**.



Reversing Written-Off Accounts

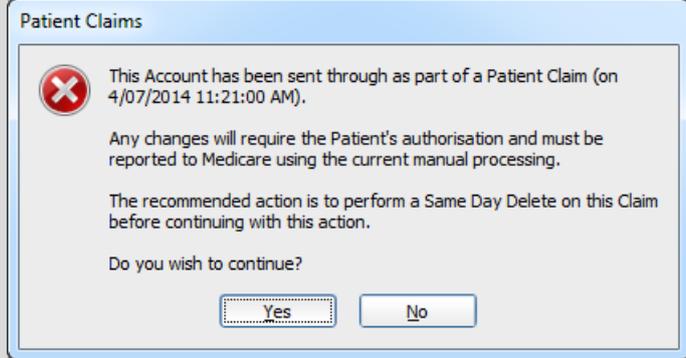
After writing off the patient's account, you can reverse the decision if you wish. Locate and right-click the written-off line item, select **Undo Writeoff**. You will be prompted to confirm this action.



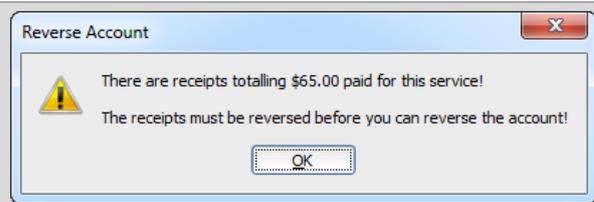
Reversing Accounts

If an account statement is incorrect, you are unable to directly edit the account. To record a change, you have to reverse the account back to zero, after which you can recreate the visit again.

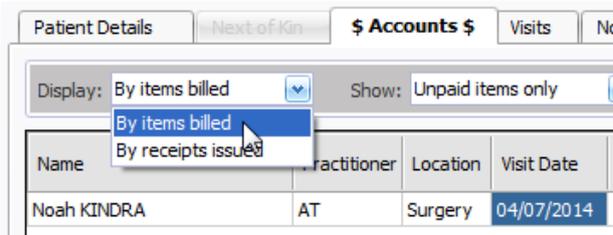
Important: *If a new patient claim was created, you will not be able to proceed reversing the account until the claim has been deleted. Click **No**, to first perform a same day delete.*



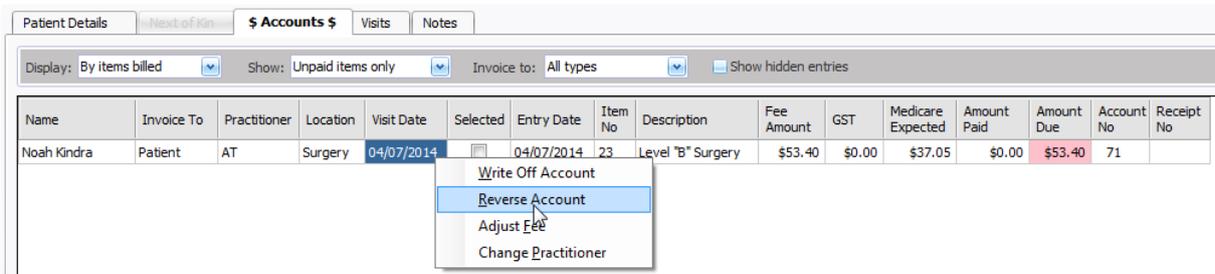
Note: *You will not be able to reverse a full or partial-paid account until you have first reversed the receipt associated with it.*



1. Open the patient's record; click the **Patient Details View** button to open the **Patient Details** window.
2. Insert the patient's name, in the format of *Surname, First name*. Press the **Enter** key.
3. Within the patient's record, select the **Accounts** tab.
4. From the **Display** dropdown, select to view 'By items billed'.



5. From the **Show** dropdown list, select to view **Unpaid items only**.
6. Right-click the account line item to adjust, select to **Reverse Account**.

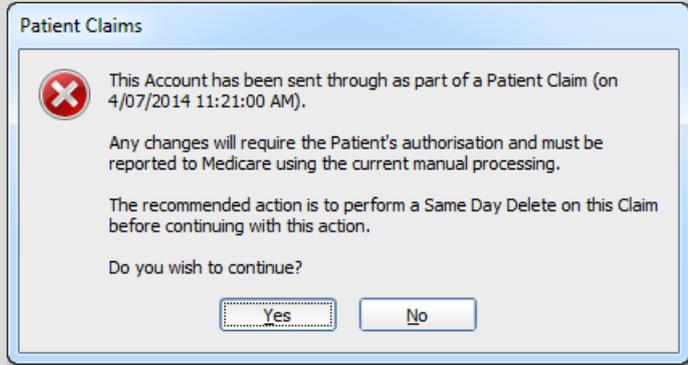


7. You will be prompted to confirm this action. Read the warning carefully. Click **Yes** to reverse the account, in doing so you will be deleting the visit.
8. You will be prompted to enter a reason why the account is being reversed.

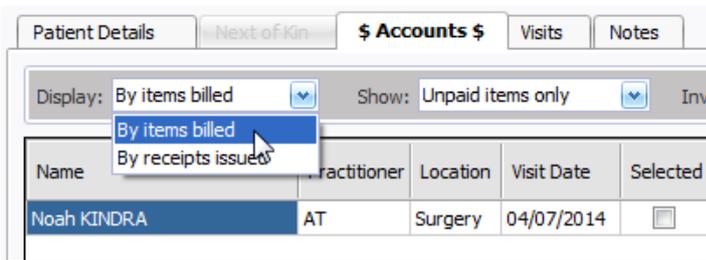
Adjusting Fees

Adjusting the account fee means adjusting the fee for the entire account, not just a single Service Item. You might wish to adjust an account fee if for example you have slightly over or under-charged for a visit. If however what you really want to do is add or remove a Service Item, or make a similar major modification to the account, you must reverse the account and re-record the visit from scratch, unless the account is a Bulk Bill voucher in which case you can still edit it from the patient's Visit tab, provided it has not yet been batched.

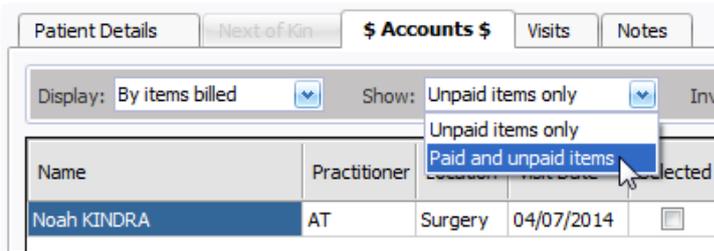
*Important: If a new patient claim was created, you will not be able to proceed reversing the account until the claim has been deleted. Click **No**, to first perform a same day delete.*



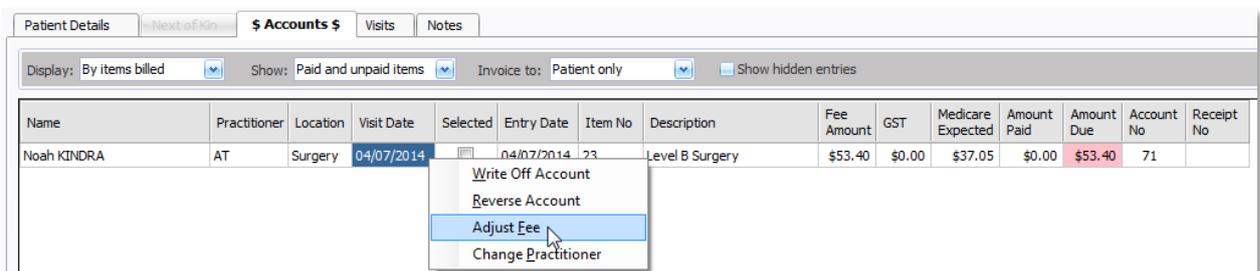
1. Open the patient's record; click the **Patient Details View** button to open the **Patient Details** window.
2. Insert the patient's name, in the format of *Surname, First name*. Press the **Enter** key.
3. Within the patient's record, select the **Accounts** tab.
4. From the Display dropdown, select to view 'By items billed'.



5. From the **Show** dropdown list, select **Paid and Unpaid items**.



6. Right-click the account line item to adjust, select **Adjust Fee**.





- Enter the **New Fee** amount, including the **Reason** for the fee adjustment

Adjust Fee

Adjust fees for Item 23 for Noah KINDRA on 04/07/2014 by AT at Surgery:

Current fee:

Current tax:

New fee:

New tax:

Reason:

- Click **Save** to confirm the modifications. You will be prompted to confirm this action.

Note: If you adjust the new fee to an amount lower than an already received amount, the patient's account will be recorded in credit for the difference.

Change Billing Practitioner

Adjusting the account fee means adjusting the fee for the entire account, not just a single Service Item. You might wish to adjust an account fee if for example you have slightly over or under-charged for a visit. If however what you really want to do is add or remove a Service Item, or make a similar major modification to the account, you must reverse the account and re-record the visit from scratch, unless the account is a Bulk Bill voucher, in which case you can still edit it from the patient's Visit tab, provided it has not yet been batched.

- Open the patient's record; click the **Patient Details View**  button to open the **Patient Details** window.
- Insert the patient's name, in the format of *Surname, First name*. Press the **Enter** key.
- Within the patient's record, select the **Accounts** tab.
- From the Display dropdown, select to view **'By items billed'**.

Patient Details | Next of Kn | **Accounts** | Visits | Notes

Display: Show: Inv

By items billed
By receipts issued

Name	Practitioner	Location	Visit Date	Selected
Noah KINDRA	AT	Surgery	04/07/2014	<input type="checkbox"/>

- From the **Show** dropdown list, select to view **Paid and Unpaid items**.

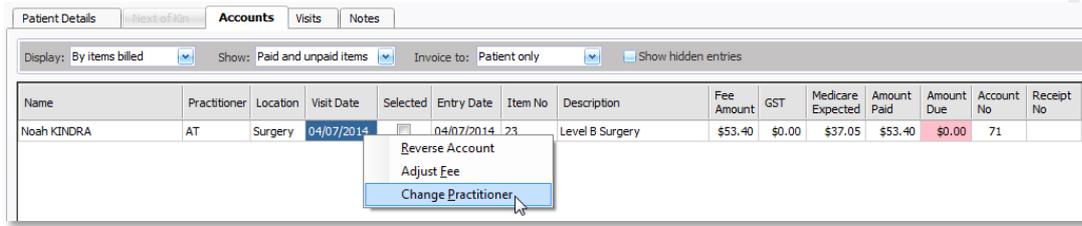
Patient Details | Next of Kn | **Accounts** | Visits | Notes

Display: Show: Inv

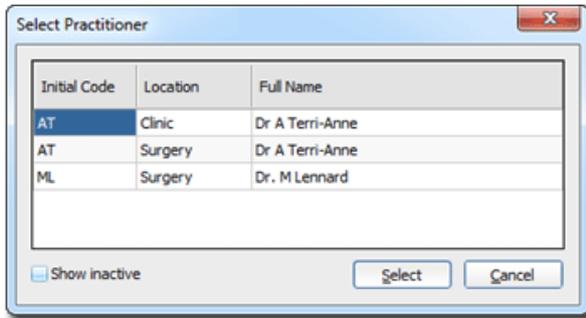
Unpaid items only
Paid and unpaid items

Name	Practitioner	Location	Visit Date	Selected
Noah KINDRA	AT	Surgery	04/07/2014	<input type="checkbox"/>

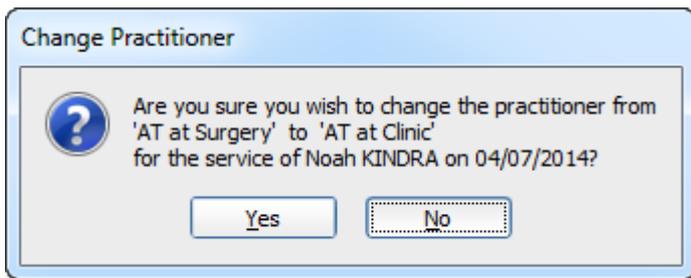
- Right-click the account line item to adjust, select to **Change Practitioner**.



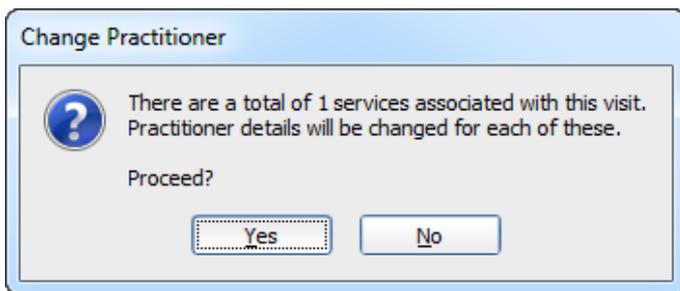
- From the list of available practitioners, select the practitioner who performed the consultation and nominate the appropriate location. Click **Select**.



- You will be prompted to confirm your selection.



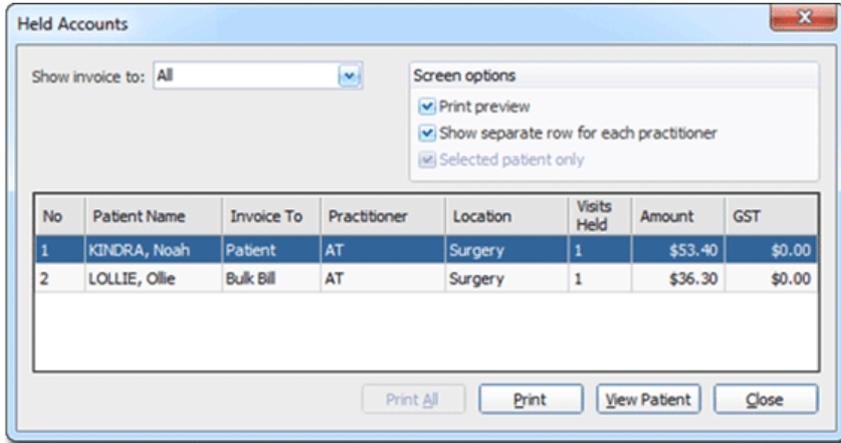
- You will be prompted to confirm that you understand that for each service performed will now be associated with the practitioner you selected.



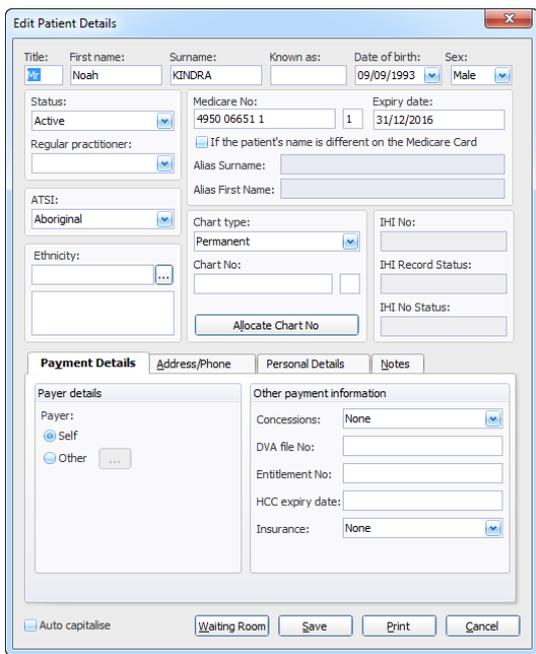
Reviewing Accounts on Hold

When recording a patient visit, you can elect to temporarily place the visit on hold to await further information. Rather than cancelling and losing the visit details, placing the visit on hold allows you to return back to the visit to enter the remaining details. After placing a visit on hold it is essential to review the list, ensuring that you finish processing all held accounts in a timely manner.

1. When it is time to review the on hold accounts, you can view a list of all the accounts currently on hold. From the menu, select **Accounts > Held Accounts**.
2. Select the patient account, click **View Patient**.



3. If required, select the **Patient Details** tab. Click **Edit** to enter any missing details in the patient’s record. Click **Save**.



4. From the Visits tab, select the visit with a **Held** status.

Visit Date	Practitioner	Location	Item No	Status	Description	Held	Non Patient	Non Visit
04/07/2014	AT	Surgery	23		Level B Surgery		<input type="checkbox"/>	<input type="checkbox"/>

5. Click **Edit**. The **Record Visit** window appears.

- Amend the visit details, including item numbers if appropriate.

Record Visit

File View

Patient name: KINDRA, Noah Seen by: AT Location: Surgery

Consult time: 11:40:09 AM Payer: Mr Noah KINDRA
17 Elisa Gr
Timber Creek NT 0852

Consult date: 4/07/2014

Invoice to: Patient

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Payment allocation	Text
23	Level B Surgery	\$53.40	\$16.35	Private Fee	0.00	\$0.00	\$0.00	
		\$53.40	\$16.35			\$0.00	\$0.00	

In hospital Apply incentive

Payment options (F12)

Pay now
 Pay later

Visit options

Remove from Waiting Room Non visit
 Non patient account Aftercare

Print options

Print voucher Print preview
 Print PC1 Copies: 1

- If the patient is not present at the time of billing, assign the visit to the patient's account. Select **Account**.
- Generate the Tax Invoice and mail it to the patient for payment.

Processing Claims

Configure Online Claiming

The following information is an overview of the steps and processes required for sending online claims to Medicare or Department of Veterans' Affairs (DVA).

1. Your practice has to register with Medicare, submitting the Online Claiming Provider Agreement.
2. Upon successful registration, Medicare will send the practice a CD with a PKI Certificate and Password that needs to be loaded on the server. For additional assistance with this step contact MedicalDirector Customer Support.
3. Enable Online Claiming for the practice, ensuring the connection details are correctly recorded. From the menu, select **Setup > Global Settings > Online Claiming**. Tick **Use online claiming**.
4. To identify the practice, enter the **Minor Customer ID** supplied by MedicalDirector. From the menu, select **Setup > Global Settings > Bulk Billing**.
5. Each workstation that will communicate with Medicare requires a direct link to the PKI file, select **Setup > Workstation Settings > Online Claiming tab**.
6. Practitioners are required to sign a copy of the **Online claiming agreement**. After submitting, edit the practitioner's profile. From the menu, select **Admin > Practitioners > Edit a Practitioner > tick Online claiming agreement signed, Patient Claims** for private billing, (optional **Allied Health**) and added to the **PKI Certificate**.

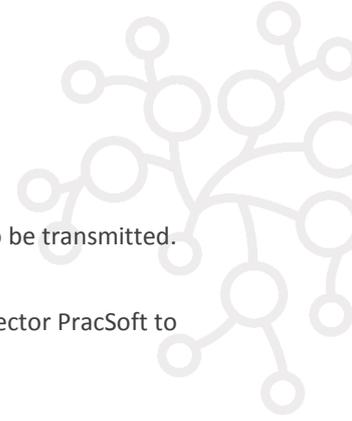
Workflow Overview: Online Claiming

The workflow outlined below comprises of four steps; recording the visit, batching the vouchers (visits), preparing and transmitting the claims, and handling any exceptions that are returned from Medicare.

Important: This workflow differs for sites taking advantage of Tyro using Medicare Easyclaim. For these practices, claims are processed and transmitted immediately to Medicare at the time of the visit. It is therefore not necessary to process the batch, prepare the claim, or manually transmit the claim.

1. The first task is to record a visit.
 - 1.1. Indicate on the Record Visit window whether the visit is to be payable via Bulk Bill or DVA.
 - 1.2. Specify the **Practitioner** and **Location** of service.
 - 1.3. Enter the **Item Numbers** to claim.
 - 1.4. Click **Claim** to create a voucher for this visit.
2. Before a claim (bundles of visits) can be sent to Medicare, they must first be 'batched' and assigned a claim number.
 - 2.1. **Processing > Batch Bulk Claims**.
 - 2.2. Select the claim, click **Show**.
 - 2.3. Review the visit details, opt to Print a copy of the list if you want to include the practitioner in the review.
 - 2.3.1. If an error is identified, close both windows.
 - 2.3.2. Open the patient's record, select the **Visit** tab. Select the visit, click **Edit**. Alter the visit according to the service provided, including Item Number/s, In Hospital Service, adding a Service Text statement to explain the items billed. Click **Claim** to update the visit details.
 - 2.3.3. Move to the next patient's record and correct the visit details.
 - 2.3.4. Re-open the Batch Bulk Claims window.
 - 2.4. Continue to the next practitioner's claim. Repeat the steps above, correcting any identified errors.
 - 2.5. After reviewing the claim, if no errors are identified or have now been corrected, click **Process**.
 - 2.6. Click **Send** to proceed to the next stage of preparing and transmitting the claim.





3. After batching the claims, you are now ready to prepare and transmit the claim.
 - 3.1. **Processing > Online/Easyclaim Claiming.**
 - 3.2. The claims listed on the left under 'Claims selected to prepare' are the new claims ready to be transmitted.
 - 3.3. Click **Next Step**.
 - 3.4. At this point the claims are ready to be prepared. It is also the last point within MedicalDirector PracSoft to make any amendments to the visit before they are transmitted.
 - 3.4.1. Click **Edit**.
 - 3.4.2. From the list, select the claim to review. Click **OK**.
 - 3.4.3. Review the claim to ensure that there are no obvious errors recorded. In particular, ensure you are only submitting MBS Item Numbers.
 - If an error is identified, select the visit. Click **Edit**. Alter the visit details, adjusting any errors. Click **Voucher**.
 - Alternatively, click **Resubmit**. This will remove the visit from this batch, making the visit editable again within the patient's record. The visit will be picked up in the next day's batch
 - 3.4.4. If there are no identifiable issues with the claim, click **Close**.
 - 3.4.5. Open the next claim, correcting any identified errors
 - 3.4.6. Click **Close** to prepare the claim.
 - 3.5. If the claims are ready to proceed, click **Yes** or **Prepare** to process the claim.
 - 3.5.1. Review the processing log to identify if any claims failed.
 - 3.5.2. If any claims do fail, click **Edit** to amend the claim. See the steps above to Edit or Resubmit the visit. Adjusting the claim will require you to re-prepare the claim. Review the log to ensure the claim was successful.
 - 3.6. Click **Next Step** to proceed.
 - 3.7. If required, click **Print** to produce a hard copy of the claim for your reference.
 - 3.8. Click **Next Step** to proceed.
 - 3.9. From the transmit claims tab, click **Transmit**.
 - 3.9.1. From the list, select the claims to transmit.
 - 3.9.2. Click **Transmit** to complete this stage.
 - 3.10. Return to the Select Claims tab. The claims are now listed on the right-hand side under 'Claims prepared/transmitted'.
4. After transmitting the claims, wait 24-to-48 hours for Medicare to process the claim and pay the practice.
 - 4.1. Click **Request** the retrieve the claim reports from Medicare.
 - 4.2. Select the claims, click **Request**.
 - 4.2.1. Print the report, identifying the payment and any exceptions that occurred. The report can be used to compare to the
 - 4.3. If the claim is paid with no errors, you will be returned to the Online/Easyclaim Claiming window.
 - 4.4. Alternatively, if an exception has been identified by Medicare, you need to correct the error;
 - 4.4.1. Select the claim to resolve.
 - 4.4.2. Select the exception (visit) to resolve.
 - 4.4.3. Click **Reason Code** to identify why an exception occurred.
 - If the reason code reflects an entry error and the practice wants to proceed with the claim, click **Resubmit/Edit**. Record the reason for the resubmit, identifying why the claim is being resubmitted. Correct the visit details according to reason code. Click **Claim**. The visit will be added to the next day's batch.
 - If the reason code reflects an error in billing, including Under or Overpayment request, a non MBS Item number. Click **Accept** to use Medicare's decision.
 - 4.4.4. Move on to the next visit, using the reason code to correct or accept any identified exceptions.
 - 4.4.5. Continue to resolve any exceptions in the other claims.



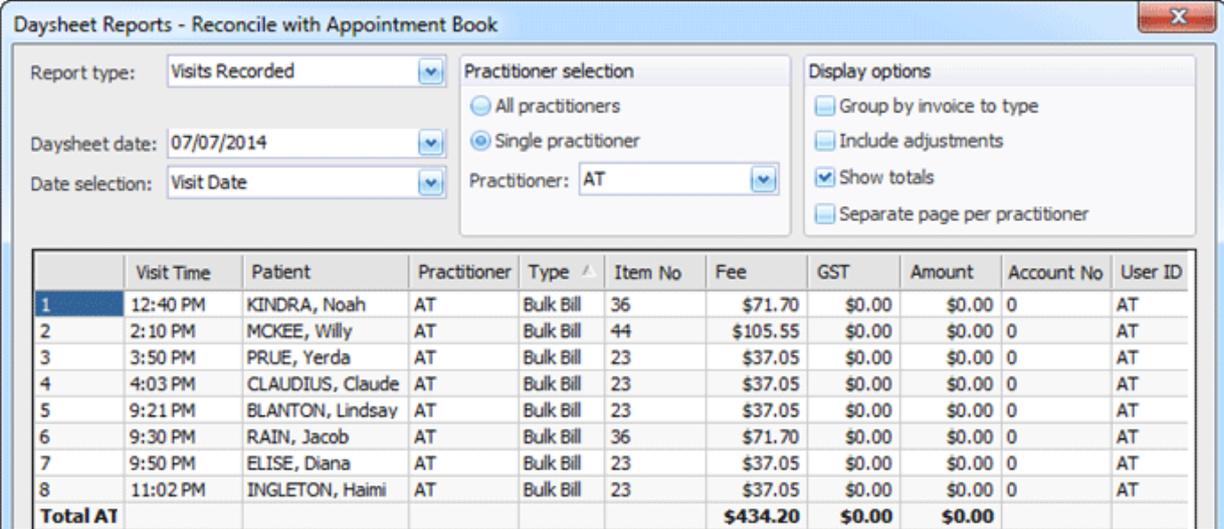
Note: An exception report contains information as to why particular vouchers within the claim were rejected, or perhaps why the refund Medicare issued differs from what you claimed. It is also possible (although rare) for an entire claim to be rejected.

Note: A payment report contains the amount of benefit paid by Medicare. If you have a batch that has had all the vouchers rejected, there will not be a corresponding payment report, and once you resolve the exceptions, that batch will no longer exist.

Review Claims: Bulk Bill / DVA

Before transmitting a claim to Medicare, it is recommended that you first review the details of the claim to ensure the practice/practitioner is paid for the services performed. This review will also minimise the number of exceptions returned by Medicare.

1. From the Waiting Room, click the **Daysheets**  button.
2. Nominate the daysheet report type; select a date and a date selection (i.e. Visit or Entry date).
3. The list of visits will automatically reflect your selection.



	Visit Time	Patient	Practitioner	Type ^	Item No	Fee	GST	Amount	Account No	User ID
1	12:40 PM	KINDRA, Noah	AT	Bulk Bill	36	\$71.70	\$0.00	\$0.00	0	AT
2	2:10 PM	MCKEE, Willy	AT	Bulk Bill	44	\$105.55	\$0.00	\$0.00	0	AT
3	3:50 PM	PRUE, Yerda	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
4	4:03 PM	CLAUDIUS, Claude	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
5	9:21 PM	BLANTON, Lindsay	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
6	9:30 PM	RAIN, Jacob	AT	Bulk Bill	36	\$71.70	\$0.00	\$0.00	0	AT
7	9:50 PM	ELISE, Diana	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
8	11:02 PM	INGLETON, Haimi	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
Total AT						\$434.20	\$0.00	\$0.00		

Important: When reviewing the visits to be claimed in the daysheet, it is recommended that you adjust the Date selection value to display both Visit and Entry dates, as occasionally these lists will differ.

- **Visit date:** lists all patients that have been seen by the practitioner within the 24hr period.
- **Entry date:** lists all the visits recorded in MedicalDirector PracSoft on that day. This can include visits that were recorded today from a last night after hours visit.

4. Review the details on screen, or click **Print** to provide a copy for the practitioner

Edit Visit: Bulk Bill / DVA

After reviewing the day's visits, if any error has been identified, it can be quickly corrected within the patient's record before it is batched. Examples of billing errors that need to be corrected include:

- The incorrect item number being billed.
- A missing item number.
- Missing a service text statement explaining why the item number is being claimed.
- Incorrect visit date.
- Forgetting to add the hospital/aged care facility provider number.
- Adding a non MBS item number (e.g. a practice item number).

1. From the Waiting Room, click the **Patient Details View**  button.
2. Insert the patient's name, in the format of **Surname, First name**.
3. Press the **Enter** key.
4. Select the **Visits** tab, and then the visit you wish to correct.

Visit Date	Practitioner	Location	Item No	Status	Description	Held
07/07/2014	AT	Surgery	23		Level B Surgery	
20/03/2014	AT	Surgery	23	T0016	Level B Surgery	

5. Once selected, click **Edit**.
6. In the Record Visit window, correct the visit as necessary.

Record Visit

File View

Patient name: Seen by: Location:

Consult time:

Consult date:

Invoice to: Retain claim for checking 

Service details

Item	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Text
36	Level "C" Surgery	\$71.70	\$0.00	Schedule Fee	0.00	\$0.00	
		\$71.70	\$0.00			\$0.00	

In hospital Apply incentive

Payment options (F12) Pay now Pay later

Visit options Remove from Waiting Room Non patient account Non visit Aftercare

Print options Print voucher Print PC1 Print preview

7. Click **Claim** to update the changes made to the visit.

Batch Claims: Bulk Bill / DVA

After reviewing the visits, the practice can now submit the claim to Medicare or DVA. The following steps outline how to batch vouchers (i.e. visits), in preparation for being transmitted.

1. From the Waiting Room menu, select either:
 - o **Processing > Batch Bulk Claims > Medicare**
 - o **Processing > Batch Bulk Claims > Veterans Affairs**

2. The **Batch Bulk Claims** window displays the list of claims that are not yet batched.

Batch Bulk Claims - Medicare using Online Claiming X

Claim details Claim 1 of 2

Practitioner: Number of vouchers:

Location: Total amount claimed:

Claim number:

Summary

Unclaimed visits:

Unclaimed amount:

Minimum number of claims required:

3. Before proceeding, if the practitioner is yet to review the daysheet, click **Show** to list the visits included in the claim.

Bulk Claim Details X

Medicare Unprocessed Claim for services provided by AT:

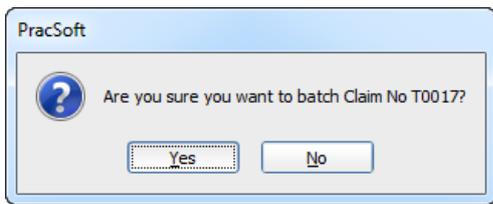
Patient Name	Visit Date	Item No	Assigned Fee
ELISE, Diana	07/07/2014	23	\$37.05
KINDRA, Noah	07/07/2014	36	\$71.70
MCKEE, Willy	07/07/2014	44	\$105.55
JULIUS, Miriam	07/07/2014	23	\$37.05
PRUE, Yerda	07/07/2014	23	\$37.05
COLINS, Joy	07/07/2014	23	\$37.05
	07/07/2014	10990	\$6.15
CLAUDIUS, Claude	07/07/2014	23	\$37.05

No of vouchers: 11 Total amount claimed: \$551.50

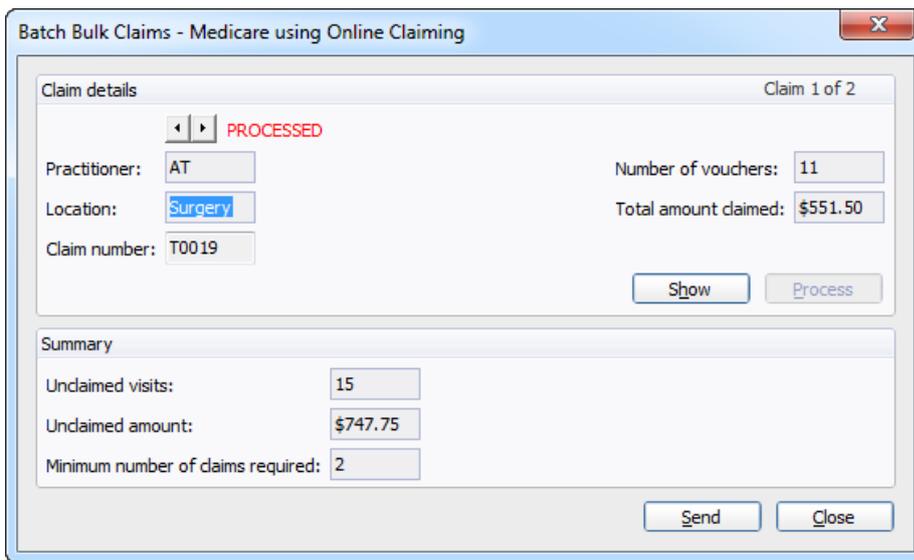
Important: If the practitioner identifies an error in the item numbers billed, close both the Bulk Claim Details and Batching Bulk Claim windows. Correct the mistake by updating the visit within the patient's record.

- a. For the patient with the incorrect details recorded, open the **Patient's record**.
- b. From the Patient Details window, click **Visit** tab.
- c. Select the visit, click **Edit**.
- d. Alter the visit as per the services provided by the practitioner, including Item Number, In Hospital service or include a Service Text.
- e. Click **Voucher** to record the change.
- f. Correct any other visit errors, return to batch the claim

4. Click **Process** to finalise the batch. You will be prompted to confirm this action.



5. Upon successfully processing of the batch, the Batching Bulk Claims window will indicate that the batch has been 'Processed'.



6. Use the forward  button to scroll through to the next unbatched claim.
7. Repeat steps 3 to 6, until all claims have been processed.
8. Once you have completed processing all the claims, you can either;
 - o Click **Send** to prepare and transmit the batch immediately, or
 - o Click **Close** to save the processed batches, for sending at a later time.

Tip: Each batch must have a claim number. It is recommended that you enable auto-claim number generation to ensure you do not accidentally use the same batch number twice. Auto-claim number generation is available via the Online Claiming tab of MedicalDirector PracSoft's Global Settings.

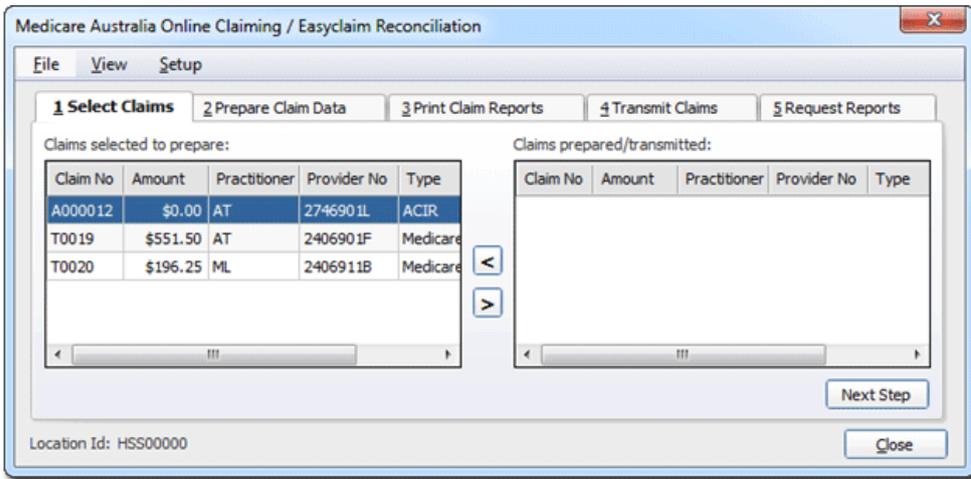
Sending Claims to Medicare / DVA

After following the steps above and successfully processed the vouchers in order to generate a batch. The next step is to sending claim/s to Medicare or DVA:

- o Select the Claims
- o Preparing Claim Data for Transmission
- o Printing Claim Reports
- o Transmitting Claims
- o After waiting 24 to 48hrs, request the Processing reports or Payment reports

1. Selecting Claims

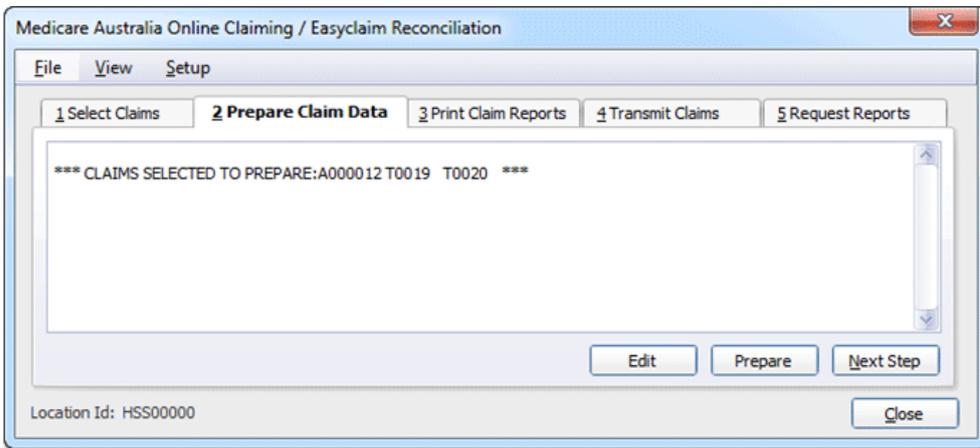
a. From the Waiting Room, select **Processing > Online Easyclaim Claiming**.



- b. The new batch claims (including any ACIR immunisations) will be listed in the **Claims Selected to Prepare** section
- c. Click **Next Step**.

2. Preparing Claims

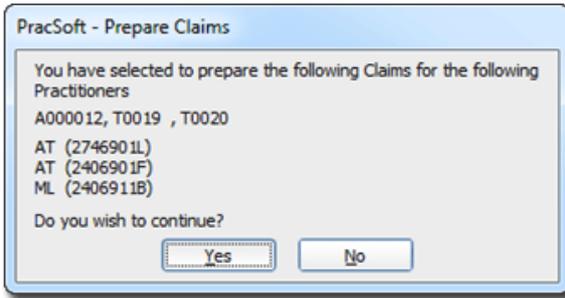
a. The **Prepare Claim Data** tab displays the claims that you have selected to prepare.



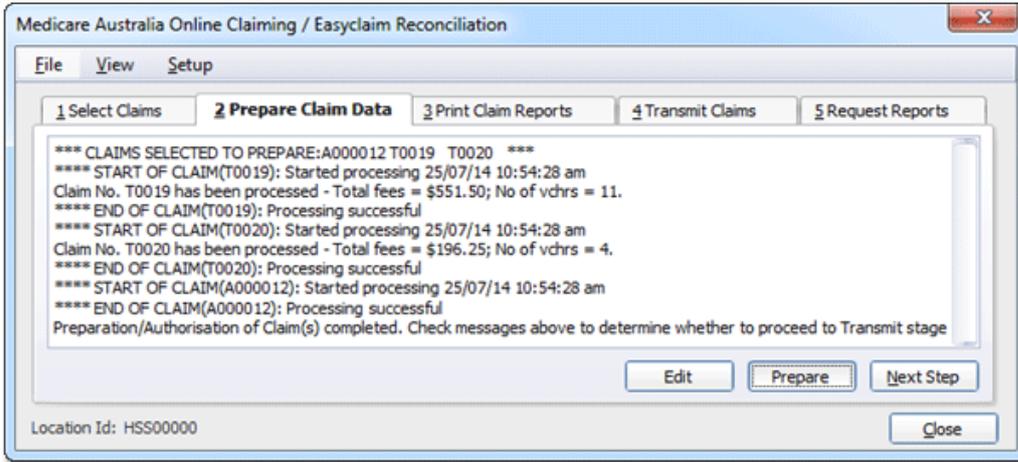
b. Click **Prepare**.



c. Click **Yes**.



d. Review the claim processing log, identifying if the claim was successfully processed or failed.



Important: If the claim fails processing you will be required to correct the issue before being able to transmit the claim. Take note of the reasons displayed (e.g. invalid Provider Number, invalid item).

- **Quick adjustments:** From the Prepare Claim Data tab, click **Edit**. Select the claim that failed, click **OK**. Locate the visit, and click **Edit** to open the **Record Visit** window. Make the appropriate changes to the visit and click **Claim**. Once all the errors with the claim have been rectified, proceed to re-prepare the claim again, click **Prepare** and **Yes**.
- **Significant changes required:** From the Prepare Claim Data tab, click **Edit**. Select the claim that failed, click **OK**. Locate the visits that failed processing, and click **Resubmit** to detach the visit from the batch. Repeat this step for all the visits that failed to process. Close Online Claiming window to open the patient/s record. Correct the errors either within the patient’s record or the visit. Repeat this step rectifying the identified errors. Select **Processing > Online Claiming**, select the **Prepare Claim Data** tab, click **Edit**. Select the claim, click **OK**. To re-attach the visits, click **Add**. Open the other failed claims to re-attach the corrected visits. Once all the errors have been corrected, click **Prepare** and **Yes**.
- The procedure for rectifying issues with ACIR immunisations claims is different, as it requires the practitioner to correct the issue within MedicalDirector Clinical.

If errors are discovered they are also recorded in a log file (called hiconline.log, found in the MedicalDirector PracSoft home directory on your computer).

e. If the claim was successfully prepared, click **Next Step**.

3. Print Claims Report

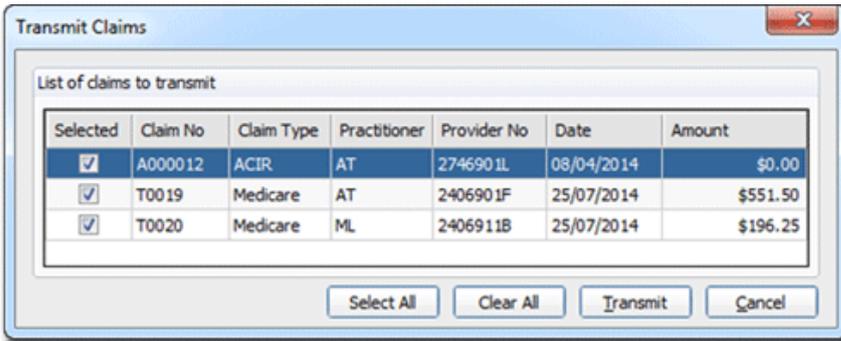
- a. Record the details of the claim. Click **Print** to generate the Print Claim Report.
- b. Click **Next Step**.



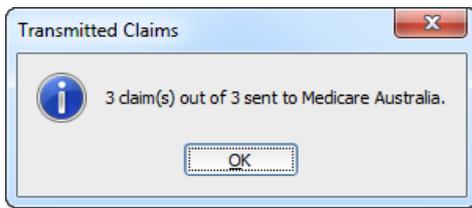


4. **Transmit Claims**

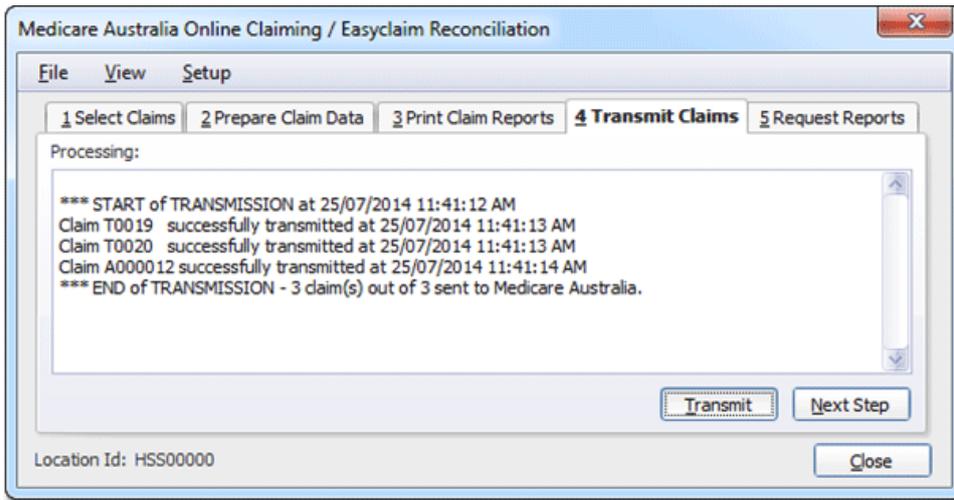
- a. Send the claims to Medicare, click **Transmit**.
- b. Confirm which claims you want to submit.



- c. When you are sure you wish to transmit the selected claims, click **Transmit**.



- d. Review the Transmission status, ensuring that the submission was successful.



At this stage you have completed the steps necessary for sending bulk claims to Medicare. After 24-to-48 hours you will need to proceed to the final step, 'Request Reports'. It is at this point you will either receive a payment report confirming Medicare's payment to the nominated bank account or a processing report listing any exceptions.

Retrieving Claims: Processing versus Exceptions

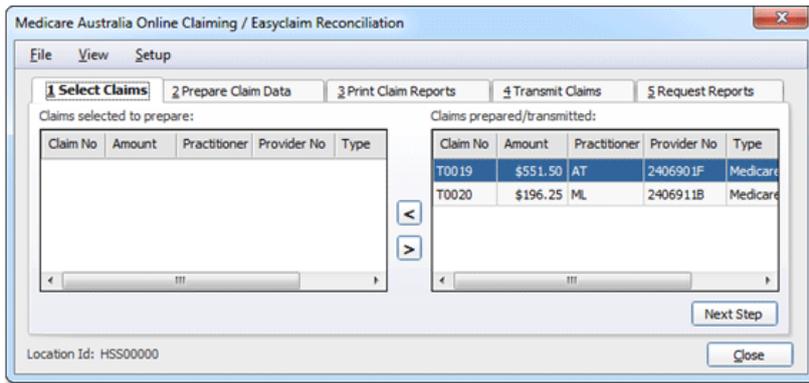
After sending a claim, you have to wait at a minimum a day for it to be reviewed. The next step is to request the processing reports back. At this point you may find that Medicare successfully processes and pays the practitioner, or returns a report that contains exceptions. An exception can occur when, for example;

- The refund Medicare issue differs to what you claimed.
- The patient’s Medicare card has expired.
- The same item number has been claimed twice on the same day.
- The practitioner is not entitled to claim a particular item number.
- The patient does not qualify for the item claimed.
- The patient’s age does not fit within the range of the service performed.
- The hospital Provider Number is not recorded.

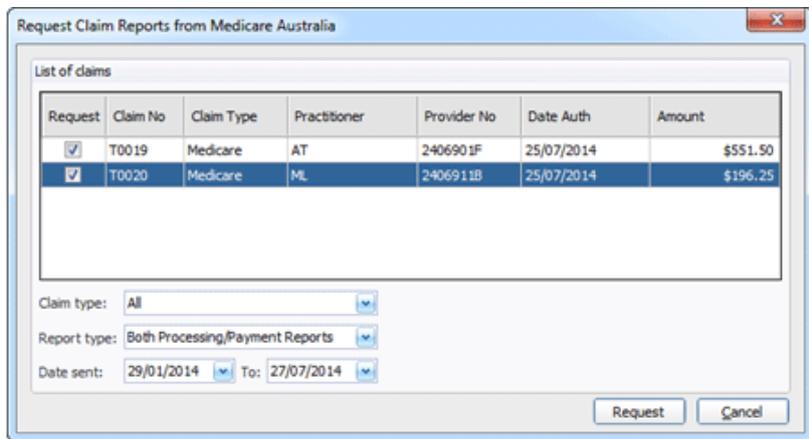
These and other exceptions must be resolved before either Medicare will complete the payment or within MedicalDirector PracSoft, accurately reconcile your accounts. Resolving exceptions involves either accepting Medicare’s decision, or editing and resubmitting the claim.

Important: *You must accept exceptions returned by Medicare where a partial payment has been made - you cannot edit and resubmit them.*

1. From the Waiting Room window, select **Processing > Online Easyclaim Claiming**. After waiting a minimum of a day for Medicare to process the claim, they are now ready to either be received or corrected if an exception occurred.

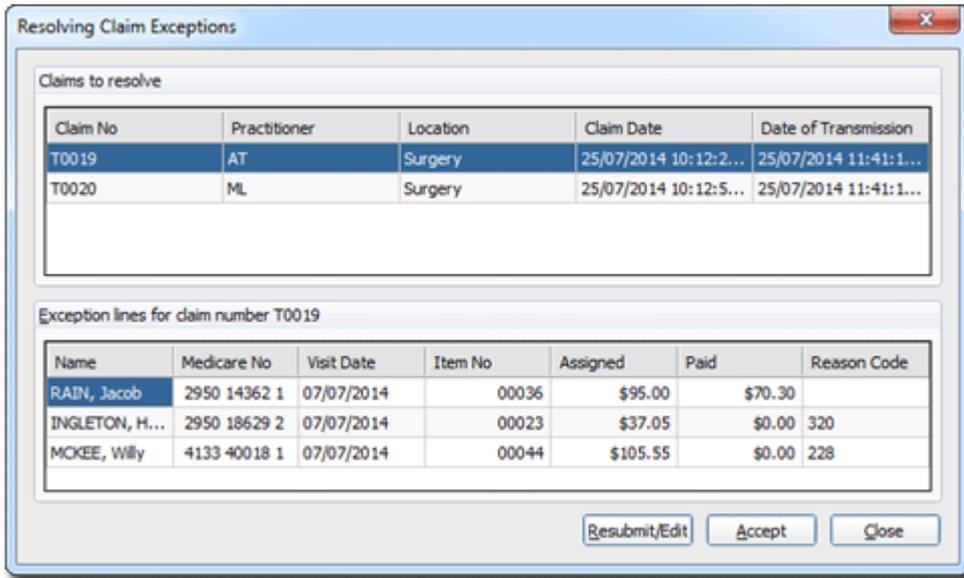


2. Select the **Request Reports** tab.
3. To retrieve the claims from Medicare, click **Request**.
4. Select the claim/s from the list, click **Request**.



5. The selected claim will be printed detailing the successful payment of the claim or exception report.

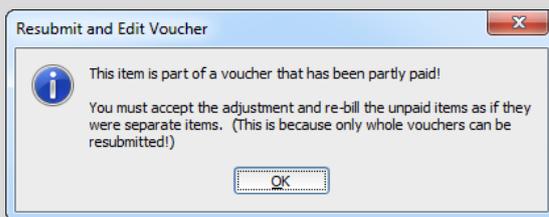
6. In the upper-half of the window, select the claim that contains the exception(s) you wish to resolve. The exceptions for that claim will appear in the lower-half of the window.
7. In the lower-half of the window, select the exception you wish to resolve.



Tip: To assist you in identifying the nature of the exception, click **Reason Code**. Use the description as a guide as to what needs to be performed, or what information needs to be added to process the claim.



Important: *Exceptions that have been partially paid must be accepted. You cannot edit the voucher and resubmit it.*



Important: For a complete list of exception codes, visit: www.medicareaustralia.gov.au/provider/vendors/reason-codes/medicare.jsp

Important: *Exceptions must be resolved for each claim to allow for payment reports to be requested, and the receipting to occur. Payment reports cannot be requested on the Request Reports Tab until these exceptions have been resolved.*



8. To resolve an exception, either;
 - o Click **Accept** to accept Medicare's decision, e.g. a partial payment or a non-MBS item.
 - o Click **Resubmit/Edit** to edit and resubmit the visit as part of the next day's batch.
9. In choosing to resubmit/edit you will be prompted to enter a comment. Confirm that you wish to edit and resubmit the voucher click **Yes**.
10. The **Edit Visit from Claim** window appears. Make any changes as required to resolve the exception as reported by Medicare.
11. Click **Voucher** to save your modifications. You will be returned to the Resolving Claim Exceptions window to continue processing the remaining exceptions.
12. Click **Close** when you have finished resolving the exceptions.

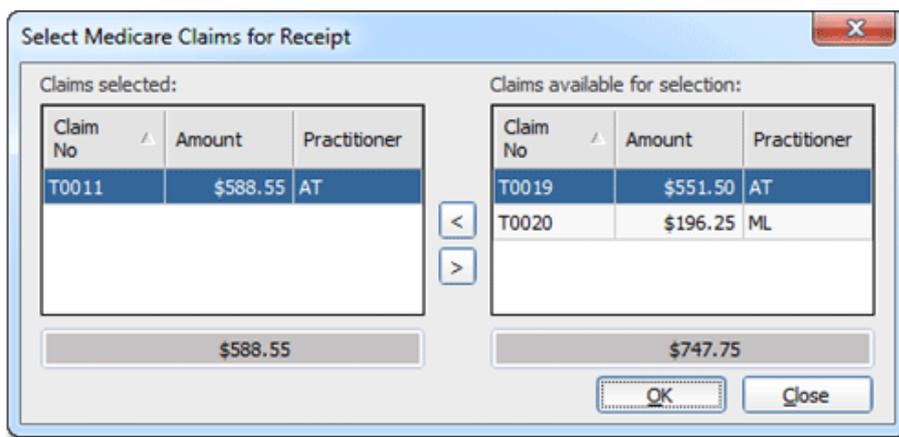
Important: *Review a history of previously-processed claims, including exceptions and EFT payments.* Starting on the Online Claiming window, from the menu, select **View > View Payment / Processing Log**.

Manual Receipt Medicare Payments: Medicare / DVA

Normally, claim payments are auto-receipted by MedicalDirector PracSoft. Ideally, you should never have to manually receipt a claim payment, unless;

- o You have manually sent a paper claim.
- o The amount in MedicalDirector PracSoft is different to what was paid by Medicare, and you cannot determine why.

1. From the Waiting Room window, select either:
 - o **Processing > Receipt Bulk Payments > Medicare**
 - o **Processing > Receipt Bulk Payments > Veterans Affairs**
2. The **Select Medicare Claims for Receipt** window appears. Note the claims that can be manually receipted appear in the Claims Selection panel ready to receipt.



3. Click **OK** to manually receipt the claim/s.

4. Using your bank statement, compare the payment received to the claim.

Receipt for Medicare Bulk Claims

Receipt date: 25/07/2014
 Payment type: Cheque
 Bank to: WES

Claims listed: T0011

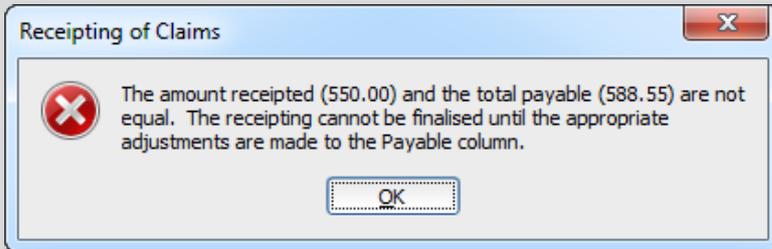
Payment details
 Amount: Medicare
 Drawer: RBA
 Bank: Sydney

Name	Medicare No	Visit Date	Item No	Assigned	Payable	Explanation
ATHOL, Daphne	4950066241	04/06/2014	23		\$37.05	\$37.05
BLANTON, Lindsay	6950295481	04/06/2014	23		\$37.05	\$37.05
COLINS, Ruby	2950140522	04/06/2014	36		\$71.70	\$71.70
DONNELLY, George	2294724441	04/06/2014	23		\$37.05	\$37.05
ELISE, Diana	6950065291	04/06/2014	44		\$105.55	\$105.55
INGLETON, Haimi	2950186292	04/06/2014	23		\$37.05	\$37.05
KINDRA, Noah	4950066511	04/06/2014	23		\$37.05	\$37.05
LOUNG, Daniel	4134857152	04/06/2014	23		\$37.05	\$37.05
			10990		\$6.15	\$6.15
MAVIS, Romeo	4950066971	04/06/2014	23		\$37.05	\$37.05
RAIN, Shannon	2950141221	04/06/2014	23		\$37.05	\$37.05
SEPPD, Cherry	4950066881	04/06/2014	23		\$37.05	\$37.05
WOETH, Tim	6950065741	04/06/2014	36		\$71.70	\$71.70

\$588.55

Buttons: Add, Edit, Resubmit, Resubmit All, Receipt, Print, Save, Close

Important: If there is an inconsistency in the values, you are not able to receipt the claim until the total amount in the claim equals the amount to be received.



To proceed you will need to either:

- Change the amount in the claim by re-submitting vouchers as necessary to correct an error, or
- Alter the amount for an item number in the Payable column.

Note: To adjust the service fee in the payable column, click the cell and type in the new fee. If known, enter the reason code indicating why the amount differs. For reporting purposes the explanation statement appears in the Adjustment report.

COLINS, Ruby	2950140522	04/06/2014	36		\$/1.70	\$/1.70	
DONNELLY, George	2294724441	04/06/2014	23		\$37.05	\$37.05	
ELISE, Diana	6950065291	04/06/2014	44		\$105.55	\$71.70	Explanation for adjusted paym
INGLETON, Haimi	2950186292	04/06/2014	23		\$37.05	\$37.05	
KINDRA, Noah	4950066511	04/06/2014	23		\$37.05	\$37.05	

5. Record the payment details, including: **Receipt date**, **Payment type** and allocate **Bank account**.



- Double-click the **Amount**.

- Click **Receipt** to manually receipt the claim.
- The claim will be removed from the Online Claiming window.

Banking

To maintain accurate financial records, it is critical to perform the banking within MedicalDirector PracSoft. This process represents the task of taking money to the bank, as well as closing of any electronically-receipted transactions. The following steps describe how to process banking for either a single-practitioner or a large practice with multiple bank accounts.

- From the Waiting Room window, either;
 - Click the **Banking**  button, or
 - From the menu, select **Processing > Banking**.
- Select the time frame to bank, either:
 - All unbanked receipts, or
 - Unbanked receipts up to a specific date/time. If you select this option, enter the date/time into the text box provided.

- Select the bank details to process, either:
 - All bank accounts, or
 - A specific bank account. If you select this option, specify which account via the associated drop-down list.

- Click **Calculate**. The **Banking** window provides a summary about the amounts to be banked (as calculated).

PracSoft - Banking

Last banking date: 15/07/2014
This banking date: 25/07/2014

Bank to: All Accounts

Cash		EFTPOS	
Total cash received:	\$1,099.90	EFTPOS auto received:	\$2,781.60
Cash-->Cheques:	\$0.00	EFTPOS manual received:	\$73.40
Cash transfers:	\$0.00	EFTPOS->Cheque:	\$0.00
Cash to bank:	\$1,099.90	EFTPOS->Bank:	\$73.40
		Direct deposit:	\$12,681.00

Cheques		Vouchers	
Number of cheques:	6	Number of vouchers:	810
Total amount:	\$2,381.95	Total amount:	\$12,681.00

Print 2nd copy Site: 0

History Cash EFTPOS Manual Receipts Process Close

- Generate a list of receipts to be banked, click **Receipts**.

**UNBANKED RECEIPT SUMMARY for WES(All Sites)
@ 25/07/2014**

Receipts

Receipt No	Payer	Payment Type	Amount	GST	Date	Drawer
32	BLANTON, Lindsay	Cash	\$181.75	\$0.00	16/07/2014	
33	ANDREWS, Felicity	Cash	\$53.40	\$0.00	19/03/2014	
34	ATHOL, Daphne	Cash	\$53.40	\$0.00	19/03/2014	
35	LOUNG, Celine	Cash	\$17.80	\$0.00	19/03/2014	
36	LOU, Elisabeth	Cash	\$18.00	\$0.00	19/03/2014	
37	RAEN, Jacob	Cash	\$125.80	\$0.00	19/03/2014	
38	ATHOL, Daphne	Cash	\$43.30	\$0.00	19/03/2014	
40	MCKEE, Willy	Cash	\$109.50	\$0.00	20/03/2014	
41	RAEN, Jacob	Cash	\$53.40	\$0.00	20/03/2014	
42	VINCE, Edwin	Cash	\$53.40	\$0.00	20/03/2014	
45	LAWSON, Luke	Cash	\$25.50	\$0.00	20/03/2014	
46	MAVIS, Romeo	Cash	\$33.40	\$0.00	20/03/2014	
47	ATHOL, Daphne	Cash	\$75.00	\$0.00	20/03/2014	
48	ANDERSON, David	Cash	\$53.40	\$0.00	16/04/2014	
50	Harris, David	Cash	\$15.30	\$0.00	28/04/2014	
51	BLANTON, Lindsay	Cash	\$187.55	\$0.00	24/07/2014	
39	SEPPA, Cherry	Cheque	\$31.75	\$0.00	19/03/2014	Cherry Seppo - 7823728372837
43	LOUNG, Janine	Cheque	\$53.40	\$0.00	20/03/2014	Loung Janine - 78374573457345
49	ATHOL, Daphne	Cheque	\$86.60	\$0.00	16/04/2014	Daphne - 7734687234687
53	Medicare	Cheque	\$1,226.10	\$0.00	25/07/2014	Medicare -
54	Medicare	Cheque	\$429.40	\$0.00	25/07/2014	Medicare -
55	Medicare	Cheque	\$54.70	\$0.00	25/07/2014	Medicare -
48	ZANBUCK, Jodie	EFT Manual	\$53.40	\$0.00	20/03/2014	Jodie Zanbuck
46	MAVIS, Romeo	EFT Manual	\$20.00	\$0.00	20/03/2014	Romeo Mavis
TOTAL			\$3,555.25	\$0.00		
TOTALS						
		CASH	\$1,099.90	\$0.00		
		CHEQUES (6)	\$2,381.95	\$0.00		
		CARDS	\$0.00	\$0.00		
		Direct Deposit	\$12,681.00	\$0.00		
		EFTPOS Manual	\$73.40	\$0.00		
		EFTPOS Auto	\$2,781.60	\$0.00		
TOTAL			\$19,017.85	\$0.00		
Non Taxable (GST Free) Total			\$19,017.85			
Taxable (subject to GST) Total			\$0.00			
TOTAL INCLUDING GST			\$19,017.85			

- Choose to **Print** or Click **Close** to return to the Banking window.
- When you are satisfied that the receipts and amounts to be banked are accurate, click **Process**.
- Click **Yes** to confirm that you want to finalise the banking process.

Confirm Bank Now

Are you sure you want to process your banking now?

Yes No

- A preview of the banking summary displays on screen. Click **Print** to finalise the banking. Alternatively, click **Cancel** if you identify a discrepancy in the banking.

BANKING SUMMARY for WES (All Sites)				
(Date Banked 25/07/2014 Date Processed 25/07/2014 3:08 pm)				
Account Name: The Practice	Bank Code: WES Merchant ID: 134			
TOTALS				
	Count			
	Amount (\$)			
TOTAL CASH	\$1,099.90			
TOTAL CHEQUES	6			
TOTAL CREDIT CARD (VOUCHERS)	0			
TOTAL BANKED	\$3,481.85			
EFTPOS Manual	\$73.40			
EFTPOS Auto	\$12,681.00			
Cheque Details				
Drawer	Bank	Branch	Cheque No	Amount
Cherry Seppo	ANZ	Renner Springs	7823728372837	\$31.75
Loung Janine	ANZ	Gldora	783745734573845	\$53.40
A Daphne	ANZ	St Leonards	7734987239487	\$86.60
Medicare	RBA	Sydney		\$1,226.10
Medicare	RBA	Sydney		\$429.40
Medicare	RBA	Sydney		\$554.70

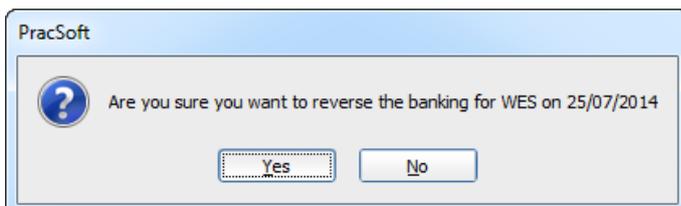
Banking History: Reverse Banking

After finalising the banking, you can view a breakdown of the history including: summary, receipts; allocations and reverse.

- Starting from the Banking window, click **History**.

Status	Banking Date	Cheque Amount	Credit Card Amount	Cash Amount	EFTPOS Auto Amount	EFTPOS Manual Amount	Direct Deposit Amount	No of Cheques	No of Card Vouchers	Bank To
	25/07/2014	\$2,381.95	\$0.00	\$1,099.90	\$2,781.60	\$73.40	\$12,681.00	6	0	WES
	15/07/2014	\$1,026.34	\$0.00	\$387.40	\$3,323.75	\$0.00	\$15,366.34	6	0	WES
Reversed	15/07/2014	\$40.00	\$0.00	\$319.00	\$3,323.75	\$0.00	\$15,366.34	1	0	WES
	1/07/2014	\$4,141.35	\$0.00	\$188.35	\$1,600.30	\$15.60	\$15,026.34	8	0	WES
	13/06/2014	\$0.00	\$0.00	\$73.00	\$4,319.00	\$0.00	\$4,323.75	0	0	WES
	6/06/2014	\$0.00	\$0.00	\$1,623.30	\$5,026.34	\$0.00	\$15,876.30	0	0	WES

- Select the banking process, click **Reverse**.



- From the prompt, click **Yes** to confirm that you want to reverse the banking process.
- The reversed amount will be listed again in the unbanked summary.

Reports

Generating Reports

MedicalDirector PracSoft provides users with a comprehensive reporting module, designed to assist you in managing the practice's daily operations, from financial accounts to providing patient summaries. Each report will require you populate a different set of criteria. The following steps are designed as a guide in how to generate a report.

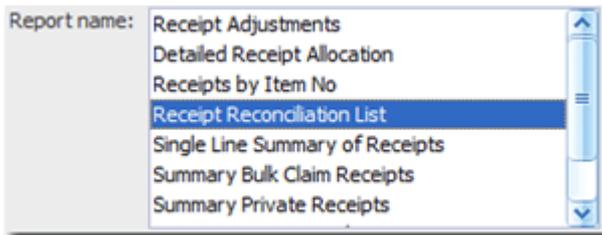
1. From the Waiting Room window, select either:

- Click the **Reports**  button.
- Select **Reports > All Reports**.

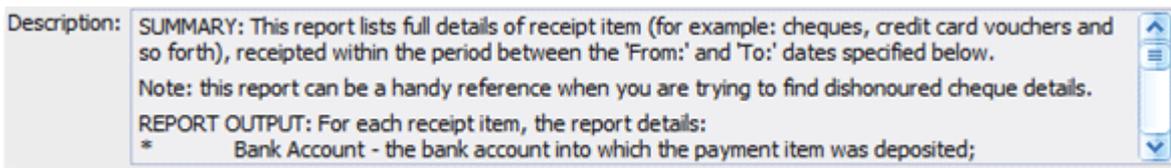
2. Select a report type from the list provided.



3. Based on the selected report type, select a report to view via the **Report Name** list.



4. Confirm the details of the report to be generated by referring to the description field



Common Selections:

- Specify the date range details to query (e.g. From, To, or Both)
- Select the page display options, (e.g. show combined or separate page by practitioner)
- Specify the Date Selection:
 - Entry Date: The date the activity was recorded in MedicalDirector PracSoft
 - Receipt Date: The date the payment was lodged
 - Report Date: [Recommended] Today's date as generated on the report

Additional Selections:

Refine the results of the report by using a dynamic set of criteria. Where available, click the **Additional** tab to narrow the reports results further.

5. Click **Print** to generate the report.



Printing Reports

Once the report has been generated, you can print it to your local printer.

1. From within the report preview, click the printer  button.
2. Select one of the available printers
3. Click **Preferences**, to customise the printing options (e.g. double side, page orientation, staple, etc.). Click **OK**. Specify the Page Range and Number of copies
4. Click **Print**.

Exporting Reports

Once a report has been generated, you can export it in a number of formats.

1. From within the report preview, click the Export  button.
2. Select the destination of where you want to export the results.
3. Enter a file name.
4. Select what file format you want to export the report in (e.g. .xls, .pdf, .doc).
5. Click **Save** to export the report in the selected format.

Financial Reports

It is imperative that you monitor the financial transactions within the practice, ensuring a steady cash flow whilst minimising the volume of accounts owing. Examples of reports that can be used to monitor the performance of the practice and practitioners:

Arrears:

- **Arrears Summary - All Arrears:** Top level report, listed by debtor category.
- **Arrears Detail - Private Account:** Lists all patient accounts that are owing and overdue.
- **Arrears Detail – Institutional Fees:** All invoices issues to an Institutional Payer.

Fees:

- **Full Details of Fees Earned:** Daily report with fees changed.
- **Fees Earned and Counts:** Daily report, with total income generated, referencing number of visits.
- **Summary of Fees Earned:** Top level report of income generated, listed by payer category.

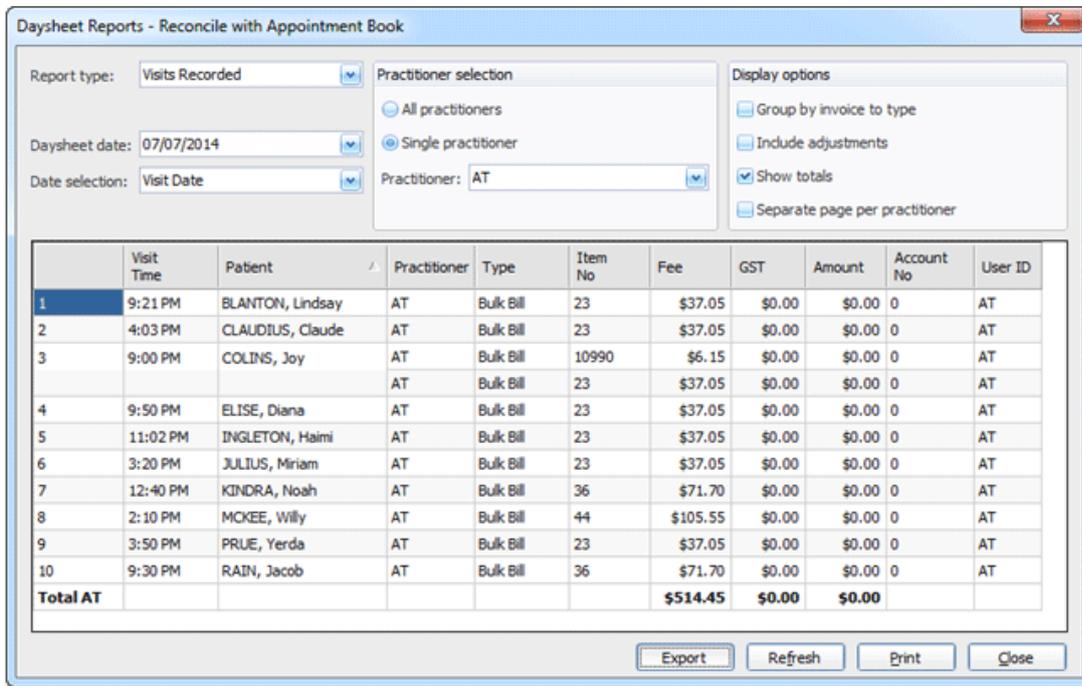
Receipts:

- **Receipt Adjustment:** Corrections to the receipting of money, including reversals.
- **Receipts by Item No:** Payments received for services performed, opportunity to deduct practice fees.

Daysheet Report

A Daysheet report is for reconciling the day's transactions. This includes visits, receipts and adjustments.

- From the Waiting Room window, click the **Daysheets**  button.



	Visit Time	Patient	Practitioner	Type	Item No	Fee	GST	Amount	Account No	User ID
1	9:21 PM	BLANTON, Lindsay	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
2	4:03 PM	CLAUDIUS, Claude	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
3	9:00 PM	COLINS, Joy	AT	Bulk Bill	10990	\$6.15	\$0.00	\$0.00	0	AT
			AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
4	9:50 PM	ELISE, Diana	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
5	11:02 PM	INGLETON, Haimi	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
6	3:20 PM	JULIUS, Miriam	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
7	12:40 PM	KINDRA, Noah	AT	Bulk Bill	36	\$71.70	\$0.00	\$0.00	0	AT
8	2:10 PM	MCKEE, Willy	AT	Bulk Bill	44	\$105.55	\$0.00	\$0.00	0	AT
9	3:50 PM	PRUE, Yerda	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
10	9:30 PM	RAIN, Jacob	AT	Bulk Bill	36	\$71.70	\$0.00	\$0.00	0	AT
Total AT						\$514.45	\$0.00	\$0.00		

- Select the 'Report Type' from the drop-down list, options include:
 - Visits Recorded
 - Receipts Issued
 - Till Summary
 - Receipt Allocations
 - Adjustments
- Choose either today's date or select from the calendar.
- Select the 'Date Selection' from the drop-down list, options include:
 - Visit Date
 - Entry Date
 - Report Date
- Choose to report on all or an individual value (i.e. practitioner, bank account)
- Set the display options, which include 'Group by invoice type', 'Include adjustments', 'Show Totals', 'Separate Pages per Practitioner'.
- The daysheet results will update dynamically as you make adjustments to the settings. Once you are satisfied with the report styling, choose to print or export the data.
 - Click **Export** to export the daysheet results to a spread sheet (.csv) file.

Tip: When saving the exported file, ensure you enter a file name and click 'Open' to 'Save' the file.

- Click **Print**. This report prints to your defined printer.

Statements

When recording a visit, in some circumstances the practice can offer a patient or an institution the option to record the visit to their account. At the completion of the billing, an invoice is generated and can be supplied to formalise the amount owing. Over time, if the money is not settled immediately, you will need to generate a Statement or Tax Invoice that details the amount.

1. From the Waiting Room window, select either:

- Click the **Reports**  button.
- Select **Reports > All Reports**.

2. From the Report type, select **Statement**.

3. Alter the date parameters and amount owing to locate all accounts within the nominated period.
4. Nominate the statement criteria, including Private account AND/OR Institutional.
5. Select the template settings, including letterhead, statement text and heading (e.g. Statement or Tax Invoice).

*Tip: Tailor the wording of the statement text, select Statement text from the list, click **Design** to modify the wording to suit the practice accounts policy.*

6. If using a statement text, tailor the results using the date range of the accounts issued.
7. For larger printing runs, split the report based on the patient's surname.
8. Click **Summary** to display a top level listing of accounts owing
9. Click **Print** to generate the report, from the print preview window, print the statement or tax invoice.

Appendix

Setting up a Multiple Location Practice

For larger practices with multiple sites sharing the one patient database, you can configure each office to reference a separate Appointment Book and Waiting Room queue. In addition, if a practitioner consults across the multiple locations, you will also need to register their details for each location.

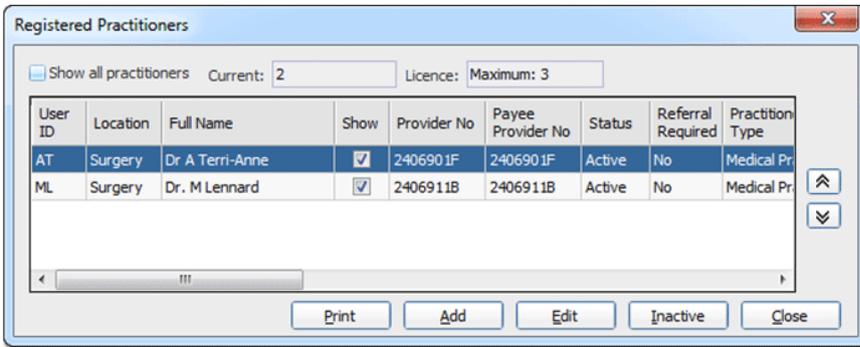
To assist in this setup, MedicalDirector PracSoft can be configured in the following way:

- Register the practitioner to consult from your location (including the Provider Number as supplied by Medicare).
- Setup the Waiting Room to only display practitioners who consult at your location.
- Create a new Appointment Book for your location, specifying the practitioner’s availability.

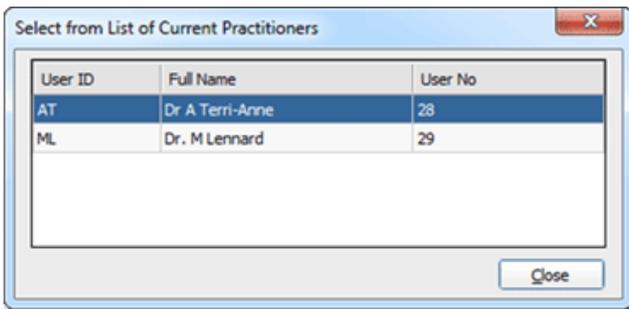
Register Practitioners for Multiple Locations

For each practice address the Practitioner consults from, ensure that you have registered their details in MedicalDirector PracSoft, referencing the Location description to match their Provider No.

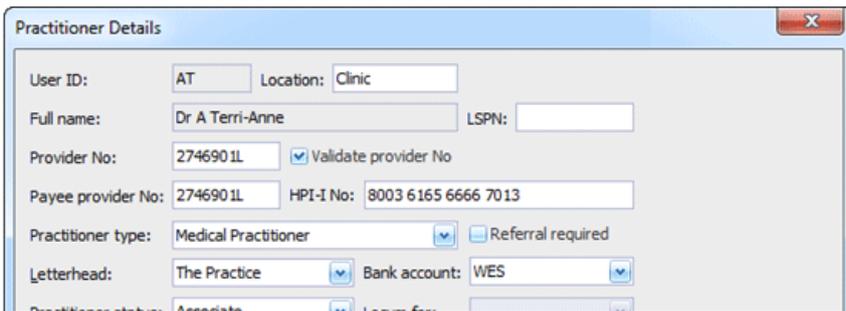
1. From the Waiting Room, select **Admin > Practitioners**.
2. Click **Add**.



3. Double-click the practitioner profile.



4. Enter the Practitioner’s details relevant to the location. In the example below, the location has been recorded as ‘Clinic’ with a Provider No that is unique to that address.

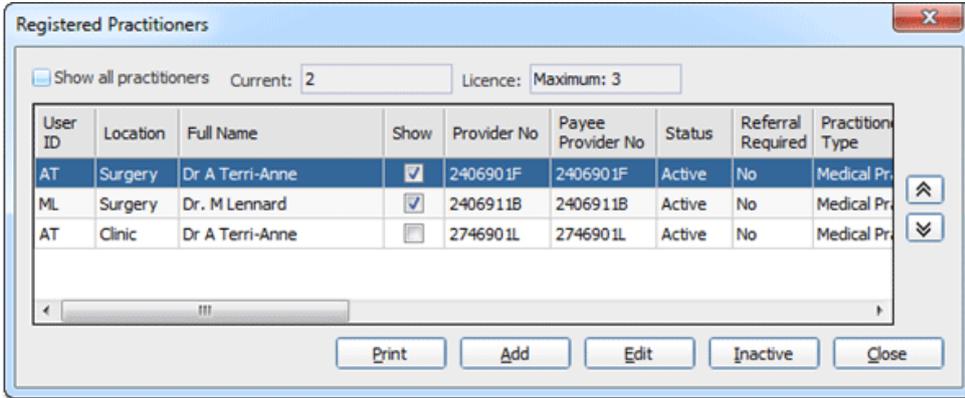


5. Click **Save** to record the new location the practitioner can consult from.

Waiting Room

After registering a practitioner and completing the steps above, the next step is to select which Practitioner's tabs to display in the Waiting Room.

1. From the list of registered practitioners, nominate what practitioners to display for your location. Click **Show** to select or deselect.

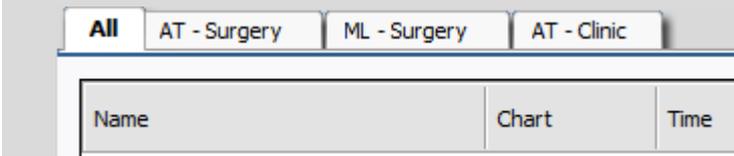


2. The Waiting Room will display only those practitioners you have selected to show.



Tip: If you are required to monitor the Waiting Room across multiple addresses, you can include the location description in the Waiting Room tabs.

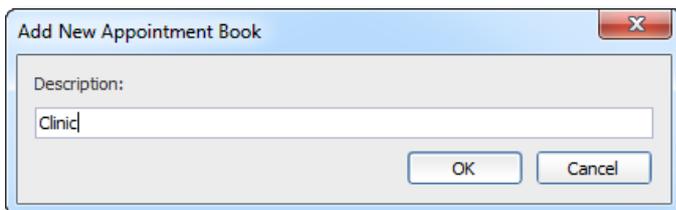
- a. From the menu, select Admin > User Settings.
- b. Select the Waiting Room tab.
- c. Select to 'Show location in tab'.
- d. Click Save.



Appointment Book

Create a new Appointment Book to record the appointments for the second location. This only needs to be performed once per location.

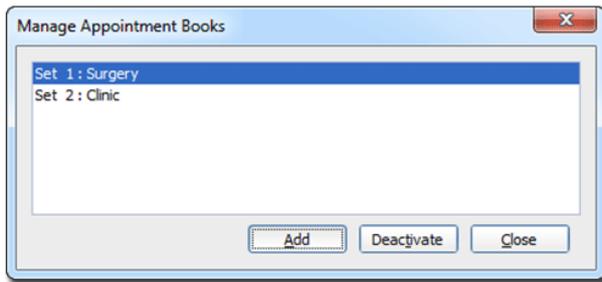
1. From the Appointment Book, click **Setup > Manage Appointment Books**.
2. Click **Add**. Enter the name of the Appointment Book.



3. Click **OK**. You will be prompted to confirm this action.



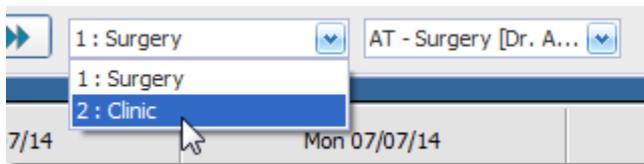
- The Appointment Book is listed and now available.



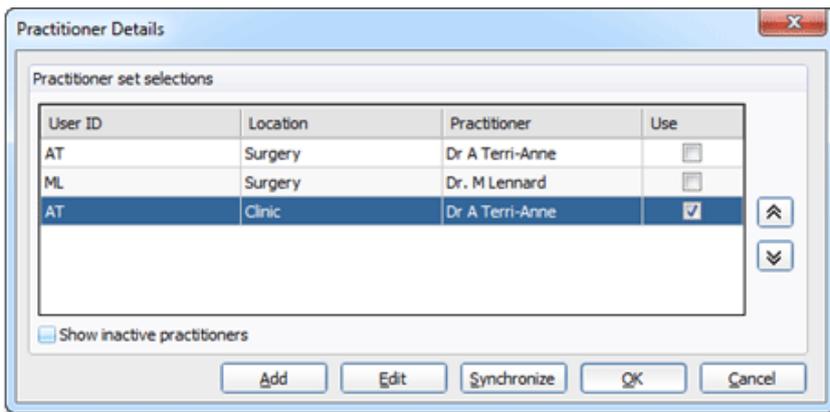
- Click **Close**, the next task is to configure the new Appointment Book.

Configure the Appointment Book

- Within the Appointment Book, select the new Appointment Book from the list.



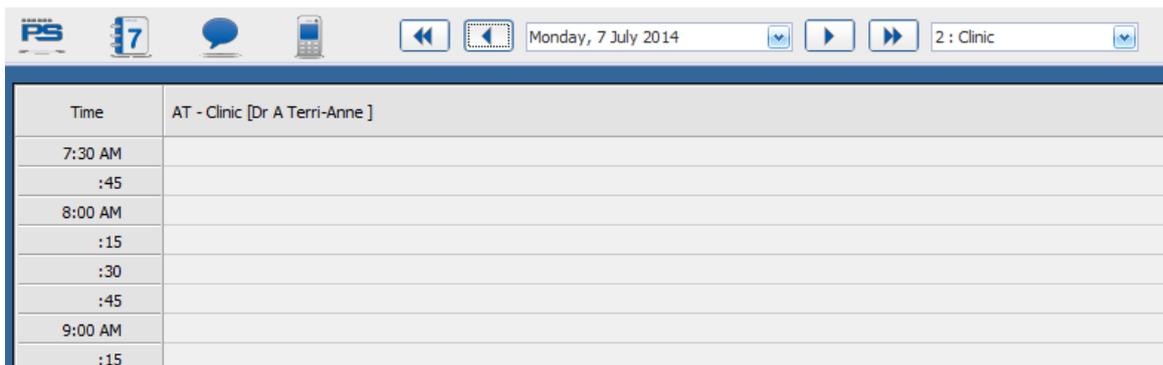
- Using the location column as a guide, tick **Use** to select the practitioners that will have appointments at this site.



- Once you have chosen the practitioners, click **OK**.

*Note: If the practitioner is not listed, click **Synchronize** to copy all the registered practitioners from the Waiting Room and add them to the Appointment Book. If the practitioner is still not listed, confirm that they have been registered for that location.*

- The Appointment Book will display the selected practitioners.



Managing Fees

MedicalDirector PracSoft supports standard fees (including the Medicare Benefits Schedule, Medicare Rebates) and up to 14 user-defined fee columns, providing your practice with the ability to charge different fees on a per-practitioner and per-institution basis.

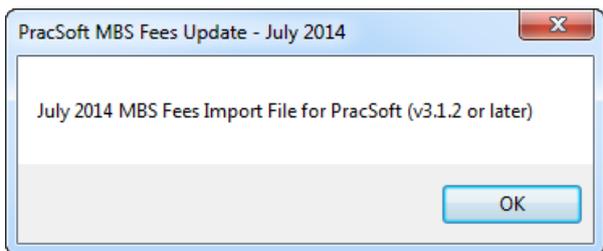
MedicalDirector PracSoft provides you with a Standard Fee list of over 100 commonly-used Service Item numbers. The Standard Fee list can include item numbers that use alpha characters (e.g. Hep B) for use with items that are not in the Medicare Benefits Schedule.

Fees can be added, edited, updated, deleted, and reactivated. If you have created a fee formula for a customised fee, or the standard fee columns have changed because of an update, you will need to recalculate each customised fee column.

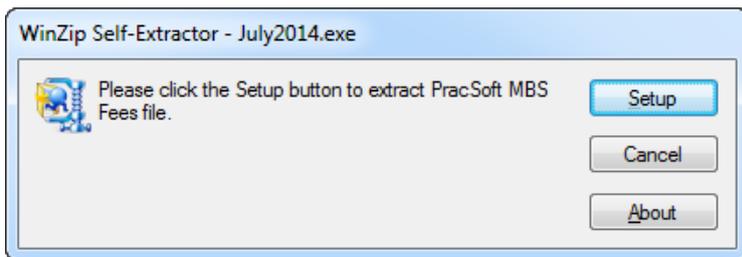
Importing Fees

Periodically you will be required to update the claimable fee amounts to keep them in line with Medicare's payment schedule. At this time the practice will receive an email from MedicalDirector, indicating that new fees are available for importing.

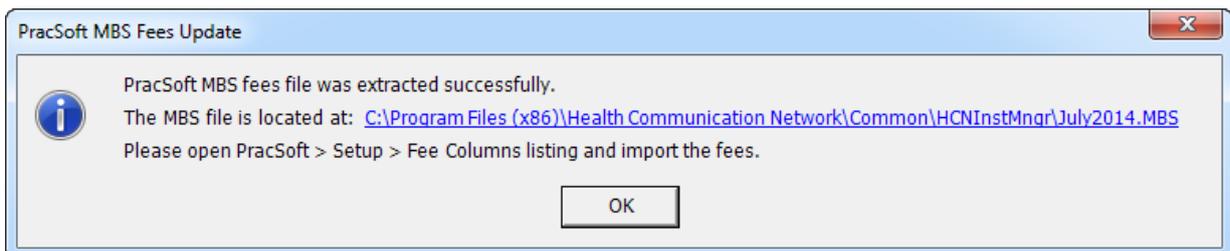
1. Navigate the MedicalDirector website to locate the importable MBS fees. In a browser window enter www.medicaldirector.com and then navigate to General Practice > Product Updates > Downloads tab.
2. Click **Download**.
3. Locate the file on your computer, and double-click it to run the application.
4. Click **OK**.



5. Click **Setup**.



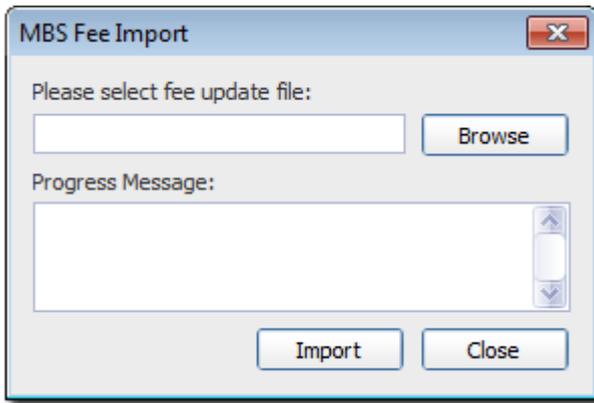
6. The MBS Fees are extracted, and the importable file becomes available from the link presented. Click **OK** to close the extraction tool.



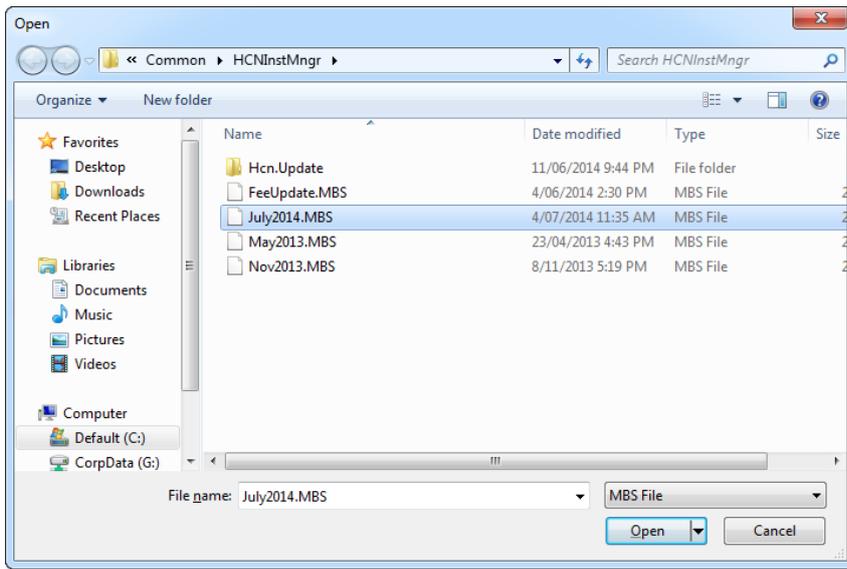
7. After downloading the extracting the MBS Fees, from the Waiting Room, select **Admin > Fees**.



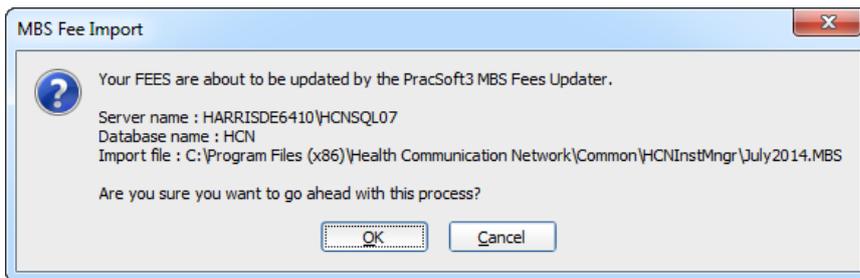
8. Click **Import Fees**. From the MBS Fee Import window, click **Browse**



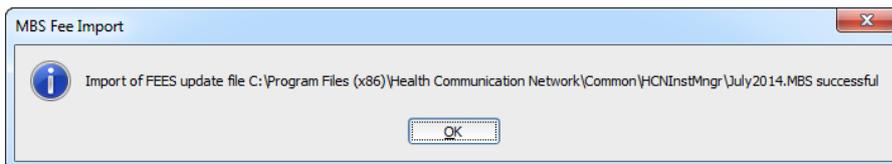
9. Locate the file, click **Open**.



10. Click **Import**. Click **OK** to continue the import process.



11. Click **OK** to confirm the successful import.



Adding Item Numbers

Before adding an item number, it is recommended that you first import the latest MBS fees, as the update will include the latest Medicare fee structure and item numbers. Review the steps listed above to download the file.

1. From the Waiting Room, select **Admin > Fees**.
2. The Fee Listing window displays the current Service Item fee structure.

Item No	Description	Op Rule	Derived Fee	Tax Rate	GST Not Applicable	Report Group	Attendance Item	Schedule Fee	Rebate 85	Rebate 75	Veteran Fee
0MT98	LMO Supplementary Payment ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$5.65	\$5.65	\$5.65	\$5.65
0MT99	LMO Supplementary Payment	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input type="checkbox"/>	\$4.10	\$4.10	\$4.10	\$4.10
CN01	Care Notes - statement of att...	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input type="checkbox"/>	\$23.80	\$20.25	\$17.85	\$23.80
CP20	CARE PLAN	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00
CP21	CARE PLAN	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00
1	After hours call out	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$120.30	\$102.30	\$90.25	\$120.90
2	After hours consulting rooms	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$120.30	\$102.30	\$90.25	\$120.90
3	Level "A" Surgery	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$16.30	\$13.90	\$12.25	\$16.90
4/1	Level A - Home Visit 1 patient	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$41.30	\$35.15	\$31.00	\$41.90
4/7	Level A - Home Visit 2 patients	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$78.60	\$74.50	\$71.60	\$78.60

3. Click **Add Item** to record a new Service Item. A row appears at the bottom of the window, ready for your input.

Item No	Description	Op Rule	Derived Fee	Tax Rate	Report Group	Attendance Item	Schedule Fee	Rebate 85	Re
73805	Urine Catalase	<input type="checkbox"/>	<input type="checkbox"/>	0	0	<input type="checkbox"/>	\$4.60	\$3.95	
73806	Preg Test	<input type="checkbox"/>	<input type="checkbox"/>	0	0	<input type="checkbox"/>	\$10.20	\$8.70	
74990	Bulk-Billing Incentive - After-h...	<input type="checkbox"/>	<input type="checkbox"/>	0	0	<input type="checkbox"/>	\$6.65	\$5.70	
74991	Bulk-Billing Incentive - After-h...	<input type="checkbox"/>	<input type="checkbox"/>	0	0	<input type="checkbox"/>	\$10.05	\$8.55	
		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>			

Tip: If you decide to not continue adding an item number at this point, you will need to enter a dummy item number and description to proceed. Once entered, you can delete the dummy item number.

4. Using the new row at the bottom of the list, enter the Item number.

10986

5. Press the **Tab** key. If the value entered matches an MBS item, MedicalDirector PracSoft will auto-populate the Description and Fee values.

10986 Service provided by a practice nurse or abori... 0 0 \$58.20

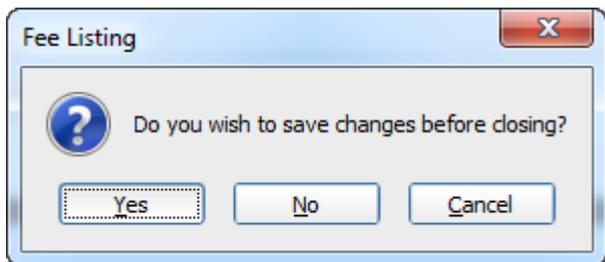
Tip: When privately billing, you can add non-MBS item numbers to the fee list to reflect the services provided by the practice, including vaccines, a practice fee, or general goods for sale. As these items are not claimable by the patient, it is important that these items are recorded separately from claimable MBS items.

6. Specify the details of the item number as appropriate, including Op Rule/Derived Fee/GST Not Applicable/Attendance Item. Refer to the following table for additional information.

7. Confirm the calculated figures, including: Scheduled fee; Rebates; Concessions; Standard fee; and any Custom billing columns (e.g. Private).

Schedule Fee	Rebate 85	Rebate 75	Veteran Fee	Veteran LMO Fee	VetLMO Rural	AMA Fee	Discount Fee	HCC Fee	Pensioner Fee	Standard Fee	Private Fee
\$58.20	\$0.00	\$0.00	\$66.95	\$66.95	\$66.95	\$0.00	\$0.00	\$0.00	\$0.00	\$72.75	\$87.30

8. Continue to add any additional item numbers, repeat steps 3 to 7.
9. Click **Close**. If any new item numbers were entered, you will be prompted to save the changes. Click **Yes** to record the fee structure.



Op Rule	Allows you to select this item as an operation rule. MedicalDirector PracSoft will calculate the highest fee for the 100% rebate, the second highest for the 50% rebate and the third highest for the 25% rebate when a fee is selected as an op rule.
Derived Fee	Derived fee items are entered as item numbers followed by a forward slash (/) and the number of patients attended (for example 35/4 represents item number 35 with 4 patients attended).
Tax Rate	Allows you to set a tax rate for specific Service Items. Previously this field was used to set the GST rate (10%). However, as from 3.14, GST is calculated automatically. As such, this field can be used to set other tax rates (such as those for overseas patients, for example). If a practitioner has chosen to set their own GST rates for Service Items (as configured via the Practitioner Details window), any rates recorded here in the Tax Rate column will override the practitioner's rates.
GST Not Applicable	Exempt a fee from GST by ticking this check box.
Report Group	Allows you to enter the report group.
Attendance Item	Allows you to identify the item as being an attendance item and therefore the rules of 100% Medicare Rebate applies. For example, if a Practitioner is who is not a specialist performs an attendance item service, the rebate will be 100% of the Scheduled Fee. All other services will attract the 85% rebate or, if performed in hospital, 75% of the Schedule Fee.

Configuring Private Billing

For private billing practices, the practitioners/owners can specify the practice fee structure. To distinguish the practice fee from the MBS fee amounts, either utilise the Standard Fee or rename a unused column.

1. From the Waiting Room, select **Admin > Fees**.
2. From the Fee listing window, click **Columns**.
3. Select a column to tailor, click **Edit Column**.

Fee Name (User Defined)	Column Name (Fixed)	Billing Code	Formula	Rounding Type	Rounding Amount	Display Order
Schedule Fee	SchedFee	SCH			\$0.10	1
Rebate 85	Rebate85	R			\$0.00	2
Rebate 75	Rebate75	RH			\$0.00	3
Veteran Fee	VetFee	V			\$0.00	4
Veteran LMO Fee	VetLMO	LMO			\$0.00	5
AMA Fee	AMAFee	A			\$0.00	6
Discount Fee	User1	D			\$0.00	7
HCC Fee	User2	HCC			\$0.00	8
Pensioner Fee	User3	P			\$0.00	9
Standard Fee	User4	S	[SchedFee] * 1.25	Nearest	\$0.05	10
Unused	User5				\$0.00	11
Unused	User6				\$0.00	12

4. Enter the Fee column details (e.g. Standard Fee).

Column name:

Fee name:

Billing code:

The formula can refer to any column name (other than itself) and/or numeric values. It can use +, -, * or /
 eg. [Rebate85] + 5 (\$5 above the rebate)
 eg. [SchedFee] * 1.15 (15% above schedule fee)

Formula:

Rounding type:

Rounding value:

Display order: numeric value between 1 and 21

Column names:
 [SchedFee]
 [Rebate85]
 [Rebate75]
 [AMAFee]
 [VetFee]
 [VetLMO]
 [User1]
 [User2]
 ...
 [User12]
 [User13]
 [User14]

Tip: If your fees are based on Medicare standard plus an additional amount for example, you can automatically calculate all your fees by using a multiplication or plus formula.

Type in the Formula field the base rate column [SchedFee] followed by the formula.

Select the rounding type and value.

The formula can refer to any column name (other than itself) and/or numeric values. It can use +, -, * or /
 eg. [Rebate85] + 5 (\$5 above the rebate)
 eg. [SchedFee] * 1.15 (15% above schedule fee)

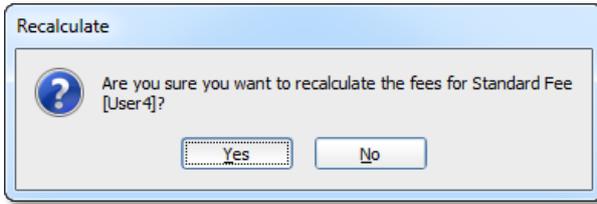
Formula:

Rounding type:

Rounding value:



5. Click **Save**
6. In entering a formula, select the column name and click **Recalculate**.
7. Click **Yes** to confirm the adjustment.



8. Click **Close** to return to the fee listing window.
9. The column fee will be recalculated based on the applied formula. If any further adjustments are required, directly enter the fee amount into the column.

Item No	Description	Schedule Fee	Rebate 85	Rebate 75	Veteran Fee	Veteran LMO Fee	VetLMO Rural	AMA Fee	Discount Fee	HCC Fee	Pensioner Fee	Standard Fee
23	Level B Surgery	\$37.05	\$0.00	\$0.00	\$42.65	\$42.65	\$42.65	\$0.00	\$20.00	\$0.00	\$0.00	\$56.00
24	Level B Home Visit Test	\$52.00	\$0.00	\$17.25	\$73.45	\$73.45	\$73.45	\$0.00	\$0.00	\$0.00	\$0.00	\$95.00

10. Click **Close**, as prompted click **Save** to confirm any modifications.

Configuring Practitioner Private Billing

After recording the practice fee, the next task is to nominate the practitioner’s default billing.

1. From the Waiting Room, select **Admin > Practitioner**.
2. As appropriate, adjust the concession options. Match the default billing preference to correspond to the billing column.



Note: Each practitioner can have their own private rates; customise the Unused columns to suit your billing preferences.

Note: If you select a Bulk Bill tick box, it will override the nominated private billing column.

3. Click **Save**. When recording a patient visit the Fee Rate structure will automatically be billed with the standard fee amount.

Configure Institutional Billing

When entering the fee structure for visits chargeable to an institution (e.g. Workers' Compensation). Capture the fee amount into the 'AMA Fee' column. Based on the location of the practice (e.g. your State), the item number, amounts chargeable, and the start date of fees will vary.

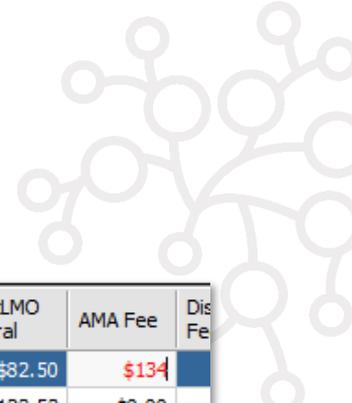
- o Before recording the visit details, review your state's Workers' Compensation website. Navigate the website to locate and download the current fee listing.

Medical Table of Costs – Schedule of Fees				Effective from 1 December 2013			
* See Appendix A for derived fee descriptions							
Item No.	Medical Fee	Item No.	Medical Fee	Item No.	Medical Fee	Item No.	Medical Fee
3	\$41	330	\$148	832	\$380	3014	\$83
4	*Derived	332	\$220	834	\$520	3015	*Derived
23	\$73	334	\$305	835	\$188	3018	\$360
24	*Derived	336	\$597	837	\$298	3023	\$192
36	\$134	338	\$467	838	\$410	3028	\$154
37	*Derived	342	\$104	855	\$261	3032	\$255
44	\$205	344	\$134	857	\$391	3040	\$380
47	*Derived	346	\$200	858	\$520	3044	\$510
						10941	\$79
						10942	\$69
						10983	\$91
						10984	\$91
						11000	\$330
						11003	\$665
						11004	\$1,475
						11005	\$1,475

- o In addition, download any supplementary fee items.

WorkCover QUEENSLAND		General Practitioner Supplementary services table of costs Effective 1 December 2013		
Service	Descriptor	Insurer prior approval required ¹	Item number	Fee – GST not included ²
Communication				
Case conference	Relating to rehabilitation or treatment options	Yes	100158	\$364.00 ^A per hour
Telecommunications – less than 10 mins	Telephone, secure e-mail, facsimile relating to rehabilitation or treatment options	No	100160	\$60.00
Telecommunications – 11 to 20 mins	Telephone, secure e-mail, facsimile relating to rehabilitation or treatment options	No	100162	\$122.00
Medical reports (see pages 3-6 for report conditions)				
Phone & fax report	Immediate	No	100208	\$146.00
Completed form	Received by insurer within 10 working days	No	100140	\$73.00
	Received by insurer after 10 working days		100139	\$37.00
Comprehensive report	Received by insurer within 10 working days	At the request of the insurer.	100144	\$364.00
	Received by insurer after 10 working days		100145	\$182.00
Progress report	Received by insurer within 10 working days		100141	\$146.00
	Received by insurer after 10 working days		100142	\$73.00
Short report	Received by insurer within 10 working days		100297	\$73.00
	Received by insurer after 10 working days		100298	\$37.00
Permanent Impairment (PI) Assessment using GEPI	For injuries on or after 15/10/2013 – report using GEPI in the approved form	Yes	100209	\$732.00
Permanent Impairment (PI) Assessment	For injuries before 15/10/2013 - report conforming to endorsed format	Yes	100209	\$732.00
	Report <i>not</i> conforming to endorsed format		100210	\$482.00
Pre-consultation reading and preparation time (for PI assessment and report)	*30 to 60 minutes	Yes	100277	\$364.00
	*More than 60 minutes		100278	\$364.00 ^A per hour
Consultations associated with a report	Standard consultation	No	100204	\$73.00
	Extended consultation	No	100205	\$134.00
	Extra long consultation	No	100206	\$205.00
Non attendance / cancellation fee	Less than 2 working days notice	No	100136	\$134.00





1. From the Waiting Room, select **Admin > Fees**.
2. From the **Fee Listing** window, scroll through the list or click **Find** to locate the item number.
3. Enter/Adjust the fee amount in the **AMA Fee** column.

Item No	Description	Schedule Fee	Rebate 85	Rebate 75	Veteran Fee	Veteran LMO Fee	VetLMO Rural	AMA Fee	Dis Fe
36	Level "C" Surgery	\$71.70	\$0.00	\$0.00	\$82.50	\$82.50	\$82.50	\$134	

4. After entering the fee rate, any future visit with an Institutional payer will automatically be billed with the AMA fee amount (e.g. 36 'Level C Consultation' \$134.00). As their no GST chargeable for the consultation, the GST Not Applicable is checked; therefore the GST rate is not added to the final amount.

Important: *Workers' Compensation item numbers and fees are not available in the MBS import. Therefore you have to manually enter your state's/territory's codes and update them based on their yearly review.*

Important: *Before reviewing your AMA fee list; consult your state's requirements regarding what information is to be recorded on the invoice; recording either the MBS Item Numbers or a distinct list of Item Numbers. A new installation of MedicalDirector PracSoft does not include these additional values; it is a process the practice needs to perform when setting up the system.*

- a) Click **Add Item**.
- b) Enter the **Item Number**.
- c) Enter the **Description**.
- d) Based on the allowable charge amount, enter the fee parameters, determining if GST is chargeable, entering the dollar amount into the **AMA Fee** column.
- e) If you leave the **AMA Fee** amount as zero, it allows you to specify the final cost from within the record visit screen.

Item No	Description	Schedule Fee	Rebate 85	Rebate 75	Veteran Fee	Veteran LMO Fee	VetLMO Rural	AMA Fee
AA010	Level A Consultation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00
AA020	Level B Consultation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$71.00
AA030	Level C Consultation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$130.00
AA040	Level D Consultation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$198.00
PHS001	Pharmaceutical Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
WCO001	Certificate of Capacity	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$44.50
WCO002	Case Conference	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$22.00
WCO004	Other Medical Items	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
WCO005	Medical Records	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00

MedicalDirector PracSoft Shortcuts

General

F1	Help	Ctrl + R	Refresh	Esc	Close Pop Up Window
%	Search Wildcard	Alt + Tab	Navigate Open Screens	Ctrl + L	Log Off

Waiting Room

F2	Search Patient	F7	Open Patient Details	Advanced Shortcuts	
F3	Add Patient to Waiting Room	Ctrl + O	Display Options (Right-Click)	Ctrl + O then E	Edit Patient Details
F5	Record Visit	Alt P	Print Options	Ctrl + O then O	Overdue Details
F6	Add New Patient	Delete OR Alt + E	Remove Patient from Waiting Room	Ctrl M	Open Patient in MedicalDirector

Appointment Book

F2	Find Patient Appointment	F9	Today	Delete	Delete Single Appointment
F3	Link Patient	F11	Tomorrow	Shift + Delete	Delete Long Appointment
Ctrl + W	Add Patient to Waiting Room	F12	Week	Ctrl + Insert	Cut Appointment
Ctrl + Enter	Non Patient Appointment	F8	4 Weeks	Shift + Insert	Paste Appointment
Shift F5	Find Next Unbooked Appointment	Alt + A	Display Options (Right-Click)	F5	Patient Cancelled Appointment
Shift F2	Repeat Search	Alt + A then P	Print Patient Appointments	F6	Patient Change Appointment

Record Visit

F5	Record Visit	Ctrl + S	Search For Item Number	Alt + S	Save, No Print
F12	Display Receipt Information	Ctrl + N	Add Visit For Same Patient	Alt + P	Print Receipt

MedicalDirector PracSoft Resources

Submit a Support Enquiry

Log a support enquiry directly from our website at <http://www.medicaldirector.com>

Your enquiries will be immediately visible to the Customer Care team to action. The online form allows you to submit technical inquiries, including the ability to attach relevant files such as screen captures and error logs.

If you are unable to use this form, send an email to the address below, outlining the difficulty you are experiencing. Alternatively, call the relevant Customer Care number.

Email: pracsoftsupport@medicaldirector.com

Phone: 1300 788 802

Subject: Customer Care Request

Support Hours: During daylight saving: 7am - 8pm Monday to Friday and 8am - 5pm Sat and Sun (AEDT)
Outside of daylight saving: 8am - 8pm Mon to Friday and 9am - 5pm Sat and Sun (AEST)

MedicalDirector Sales

Contact your Account Manager to discuss the purchase of additional practitioner licences, or to book your place at a MedicalDirector PracSoft beginner or advanced training session.

Knowledge Base

Search using keywords, or simply browse through our Knowledge Base to find answers to your technical questions. The Knowledge Base is comprised of common questions that have been submitted to our Customer Care team. Access the Knowledge Base via the MedicalDirector website <http://www.medicaldirector.com/kb>

Online Help (F1)

Press F1 on your keyboard, to quickly access comprehensive instructions for using MedicalDirector PracSoft. Alternatively, look up keywords or phrases in the Index or Search for a topic of interest.

Webinars

Want to learn more about MedicalDirector PracSoft, or stay up-to-date with the latest advances. Register to attend a live webinar covering a variety of topics. Recordings after the session are available on our website for you to watch if you missed the session. Register to attend live or access the recordings via the MedicalDirector website.

Government Resources

<http://www.mbsonline.gov.au>

<http://www.ehealthinfo.gov.au>

<http://www.humanservices.gov.au/customer/services/medicare/healthcare-identifiers-service>

<http://www.medicareaustralia.gov.au/provider/health-identifier/index.jsp>

<http://www.medicareaustralia.gov.au/provider/pubs/medicare-forms/>

Health Communication Network Limited
Level 4, 201 Pacific Highway,
St Leonards, NSW 2065
Tel: +61 2 9906 6633
Fax: +61 2 9906 8910
www.medicaldirector.com
A.B.N. 76 068 458 515
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