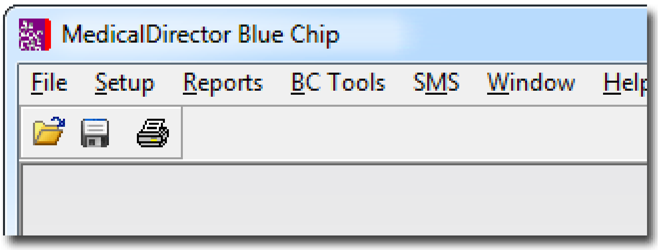
MedicalDirector Blue Chip User Guide

Contents

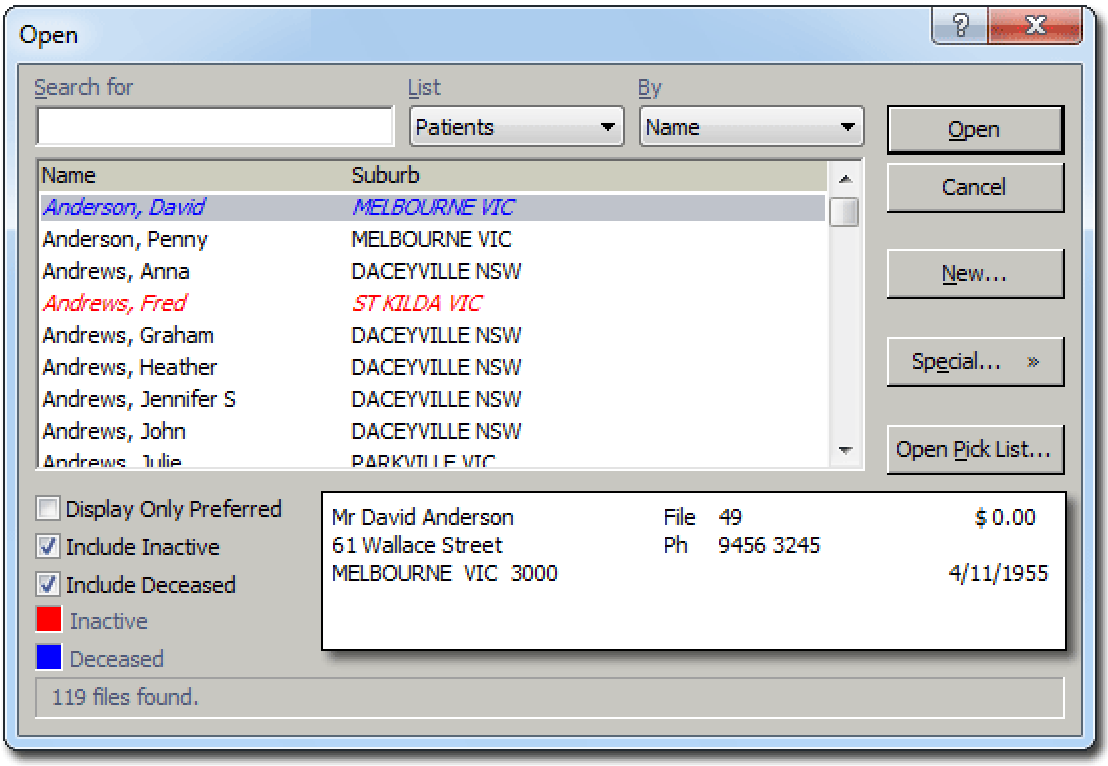
Patient Records

Opening a Patient's Record

1. Click the  button at the top-left of the MedicalDirector Blue Chip window.

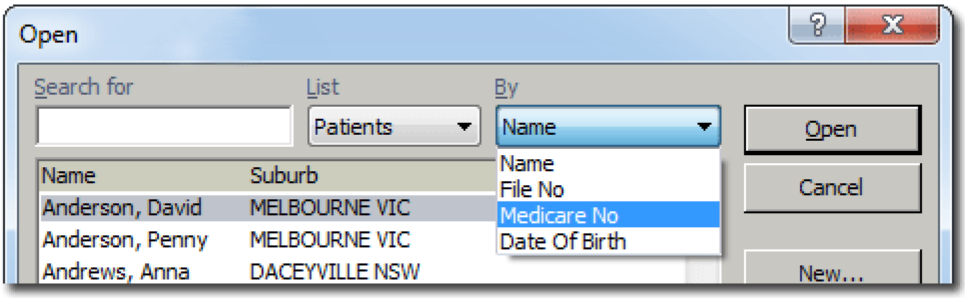


2. Begin typing the name of the patient you are searching for. The patient list is filtered dynamically as you type.



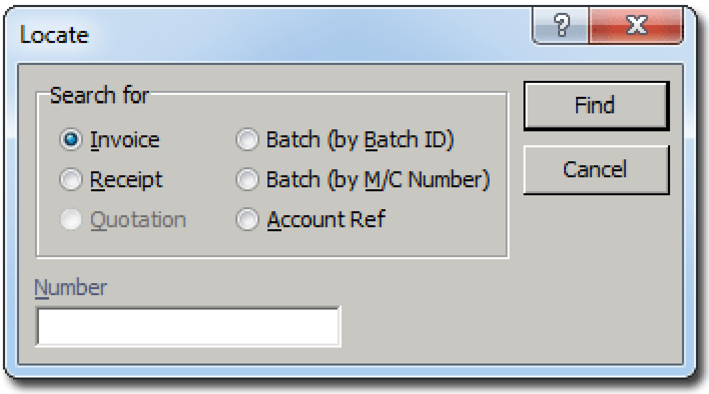
3. To open a patient's record, either double-click their name or select them and click 
4. Their record will open in the **Patient Explorer**.

Other Methods for Searching for Patient Records



<table>
<tr><td>File Numbers</td><td>Click the ‘By’ drop-down list and select ‘File No’. Then, within the ‘Search For’ field, type the file number of the patient you wish to search for.</td></tr>
<tr><td>Medicare Number</td><td>Click the ‘By’ drop-down list and select ‘Medicare No’. Then, within the ‘Search For’ field, type the Medicare number of the patient you wish to search for. Remember to include spaces to match the Medicare Number formatting.

This method is useful when you receive a Medicare cheque from someone who has torn off the detailed information at the top.</td></tr>
<tr><td>Date of Birth</td><td>Click the ‘By’ drop-down list and select ‘Date of Birth’. Then, within the ‘Search For’ field, enter the day/month/year. As an example, 3/3/1971 will display all patients born on this date.</td></tr>
<tr><td>Invoice/Receipt</td><td>Press Ctrl + L to call the Locate dialog box.



This method is useful when an insurance company) sends a cheque that quotes the invoice but not the patient’s name.

1. Select the required option.
2. Type the reference number.
3. Click Find</td></tr>
</table>

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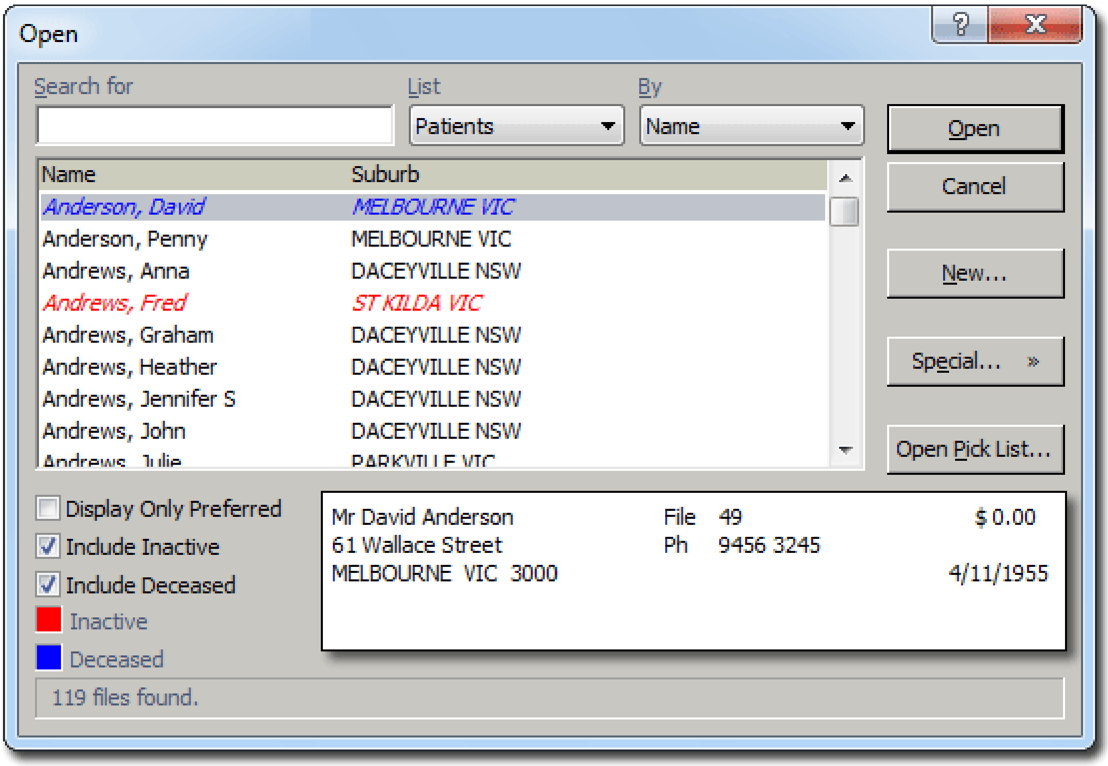
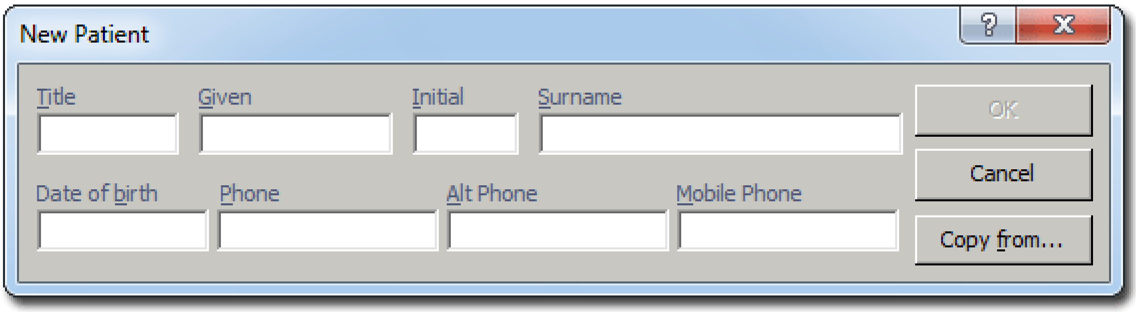
Creating a New Patient Record

1. Click at the top-left of the MedicalDirector Blue Chip window. The **Open** window appears.

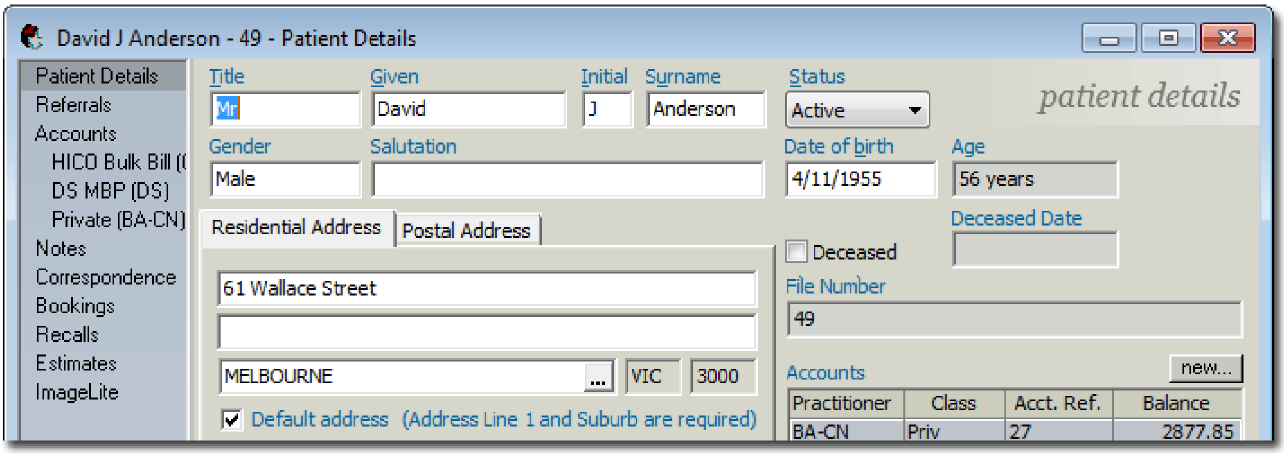


2. Click New... The **New Patient** window appears.



3. Complete details as desired. Although the ‘Given’ and ‘Surname’ fields are the only two required, it is recommended to record the patient’s contact phone number(s) and Date of Birth to minimise the risk of creating duplicate patient records.

4. Click OK to confirm these details and close the window. The patient’s record is added to MedicalDirector Blue Chip and is presented to you within the **Patient Explorer**, from where you can add more-detailed information.

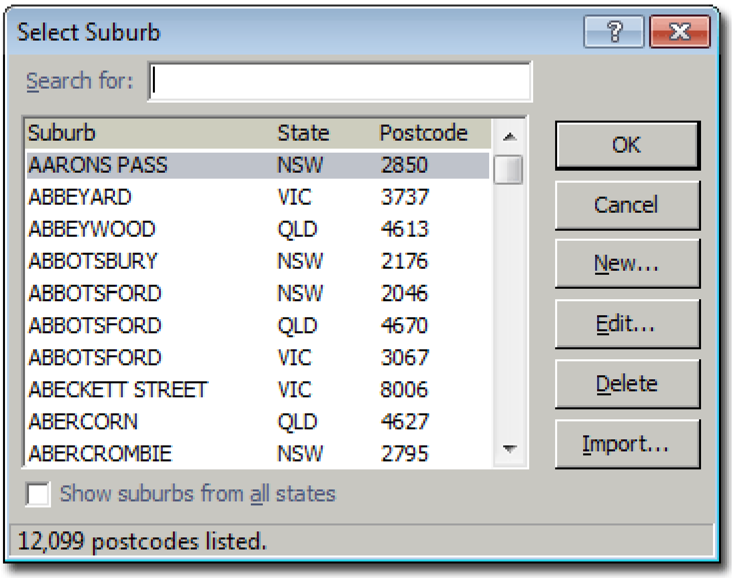


Residential/Postal Address

MedicalDirector Blue Chip allows for residential addresses to be recorded as per Medicare requirements and also allows recording of postal addresses. The residential address defaults as the patient's primary mailing address, but, by entering a postal address, MedicalDirector Blue Chip changes the primary mailing address accordingly.

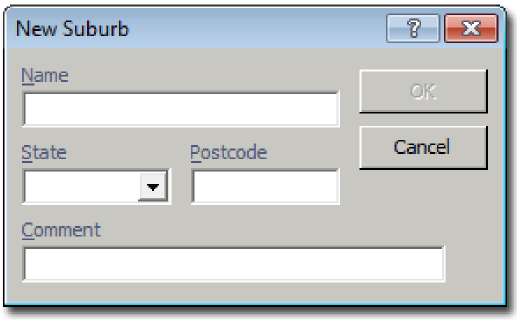
Three text boxes are provided for entering addresses. All addresses will require an entry in both the first and third box (with the third being a combination of suburb, state and postcode). The ellipses button ... indicates that there is a list from which to choose. In this case, the list contains every suburb and postcode in the Australia Post index (which can be updated periodically). After typing in the suburb name, press Tab. A list of all suburbs will appear.

- If the suburb name does not appear on the list, then it is likely that it is a suburb from another state.
- If the suburb you are searching for is in a state from which you do not usually draw patients, tick the 'Show Suburbs from all States' check box, to ensure that the suburb is definitely not already in the database.



Adding a New Suburb/Postcode

If you are certain that a suburb is not already in the database, you can add it by clicking New... Note that MedicalDirector Blue Chip accepts international suburbs with postcodes of more than 4 digits.

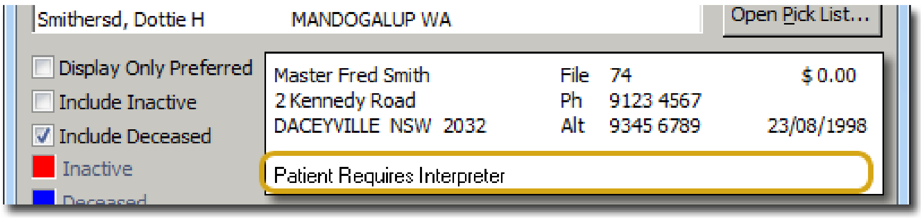


If the desired suburb does appear on the list, but you have not yet found a unique match (e.g. you have typed Bondi, which finds multiple matches such Bondi, Bondi Beach) the suburb dialog box will appear with the first match highlighted. Locate and select the suburb, and then click OK Your insert point moves to the 'Phone' field.

The suburb/postcode list can be updated for all states by downloading a .CVS file from the Australia Post website. Please contact MedicalDirector Customer Care on 1300 300 161 Option 2 for assistance.

Comments

The 'Comment' field is designed as a quick-reference field for any general information regarding your patient. Information entered here appears in the Details Summary section located at the bottom of the Open window, used when opening patient records, and may assist in locating the patient whose record you wish to open.



First Visit Date

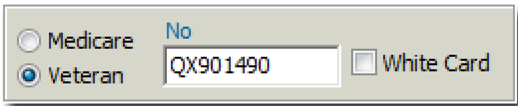
The 'First Visit Date' field on the **Patient Explorer** is used to record the date that the patient has/had their first appointment with the Practice.

Occupation and Email

If the 'Email' field is available, a patient's email address can be recorded and used to send correspondence. If the 'Occupation' field is available, it will have an associated ellipses ... button. This accesses a user-defined list (empty when used for the first time).

Medicare/Veterans Affair Numbers

When entering a Medicare number, the 'Valid To' and 'Ref' fields are also required. If you enter an invalid number it will be removed automatically after exiting the field. To enter a Veterans' Affairs number select the 'Veteran' option instead.

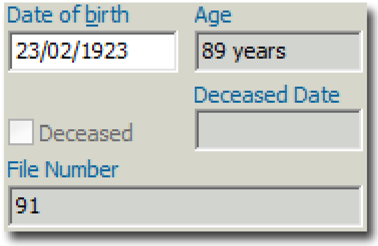


Online Patient Verification (OPV)

OPV uses an active Internet connection to check the identity credentials of a patient against data held by Medicare.

File Numbers

The ‘File Number’ section appears below the Date of Birth text box.



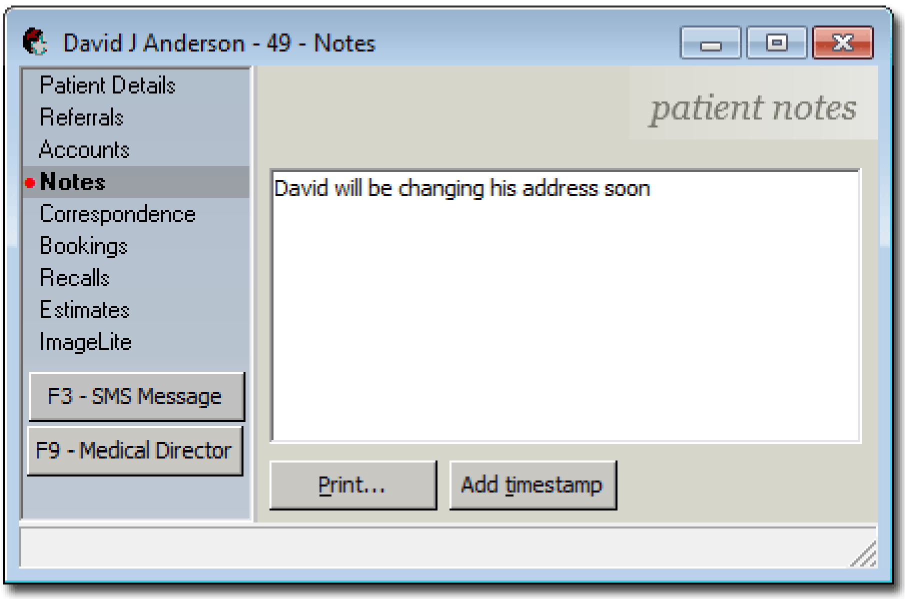
- If you have elected to disable file numbers, this section will be greyed-out.
- If you have elected to automatically generate file numbers, a number will appear for each new patient based on the setup criteria. Examples include 1234, EC1234 or 06031234. Note that MedicalDirector Blue Chip will not accept zeros (e.g. 0001) when configured for automatic numbering. It is recommended that the number length be kept to a minimum, especially if interfacing with MedicalDirector Blue Chip’s Day Surgery module which has an eight-character limit to comply with Government standards.
- If you have elected to manually generate file numbers, this field appears empty. Please note that the File Number field accepts a maximum of 15 characters.

Patient Notes

The Notes module is a free-text area for storing general information about a patient. This can provide you with easily-accessible and current information, saving you the need to constantly refer to physical files. It was designed with general information in mind, such as whether or not the patient is a bad payer, or if they require an interpreter, or for information regarding test results, etc.

Within the **Patient Explorer**, click ‘Notes’ within the Margin Menu of the patient’s record.

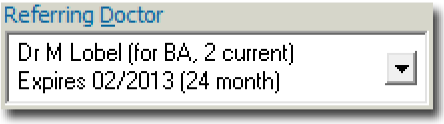
You can add a timestamp by clicking the associated button. To add a note, simply click within this window and begin typing. To save it to the patient’s record, either press Ctrl+S or click the button at the top-left of the MedicalDirector Blue Chip window. Saving a note causes a red dot to appear next to the Notes entry in the Margin Menu, as shown in the example above. This is a visual cue to alert you to the entry in the patient’s record. You can add or remove as many text entries as you desire from within this window, all of which are considered one ‘note’ i.e. there is only one Notes window.



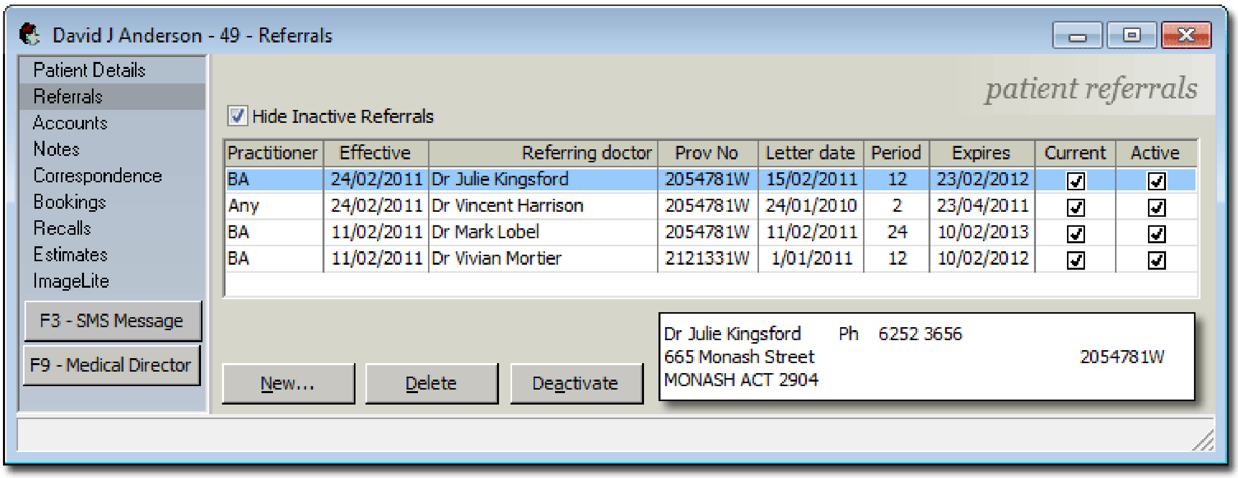
Referrals

The referrals list shows all current and active referrals associated with the patient, and can be accessed via;

- The ‘Referring Doctor’ section within the **Patient Details** window.



- The **Referrals** window (accessed via the **Referrals** menu item within the Margin Menu).

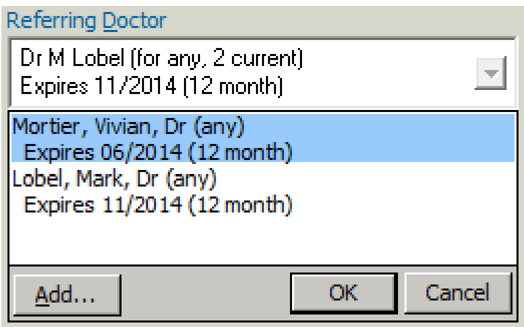


Clicking Deactivate deactivates an active referral and hides it from view. Hidden referrals can be revealed by ticking the **Hide Inactive Referrals** check box, as shown above. If a referral is deactivated by accident, it can be reactivated by revealing it (as explained), selecting it, and clicking Activate

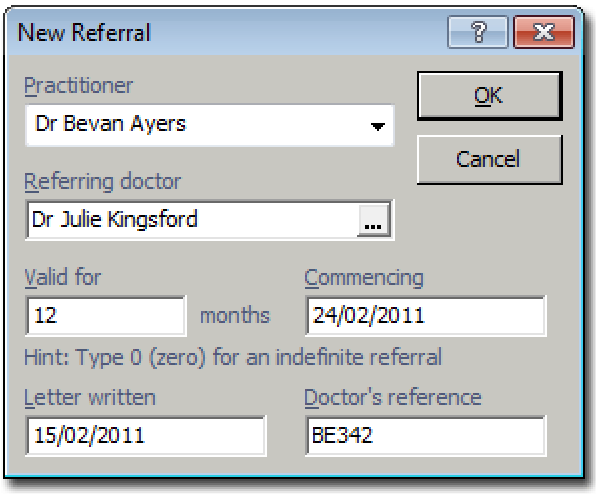
A referral cannot be edited once it is entered into the system. If a mistake is made keying-in referral details, the referral must be deleted and re-entered as a new referral. If a mistake is discovered *after* a referral has been referenced, the referral must be deactivated and a new referral created containing the correct information i.e. a referral *cannot* be deleted after it has been used.

Creating Referrals

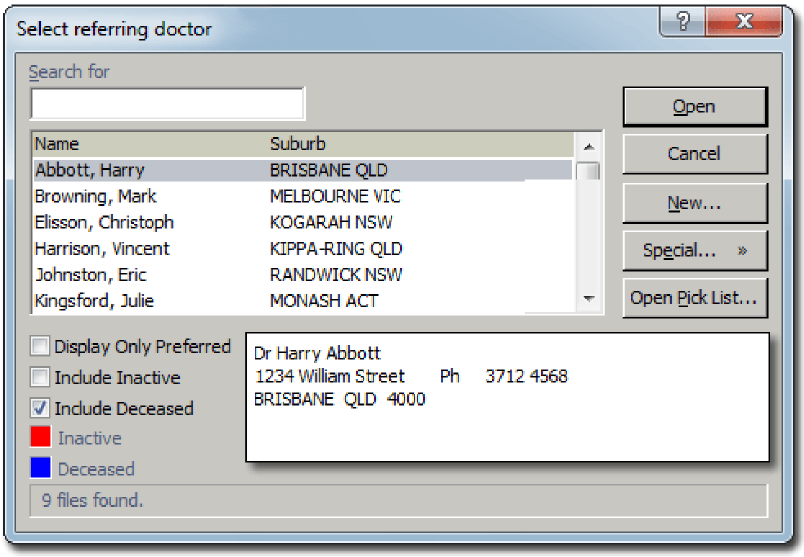
1. Either;
   - Via the **Referrals** window click New... or
   - Via the **Patient Details** window, in the Referring Doctor section, click ▼, and then click Add...



2. The **New Referral** window appears, for you to complete.



- The **Practitioner** list allows the referral to be used by all practitioners or a specific practitioner.
- Type the surname of the referring practitioner in the associated text box then press Tab If the practitioner is already entered into the system, their name will automatically be inserted. If the practitioner has a surname identical to another, or they consult from a different location, you will be prompted to select the specific practitioner.



If the referring practitioner's name is not present, click New... to enter their credentials.

3. Continue completing the referral information, and then click the **OK** button to confirm.

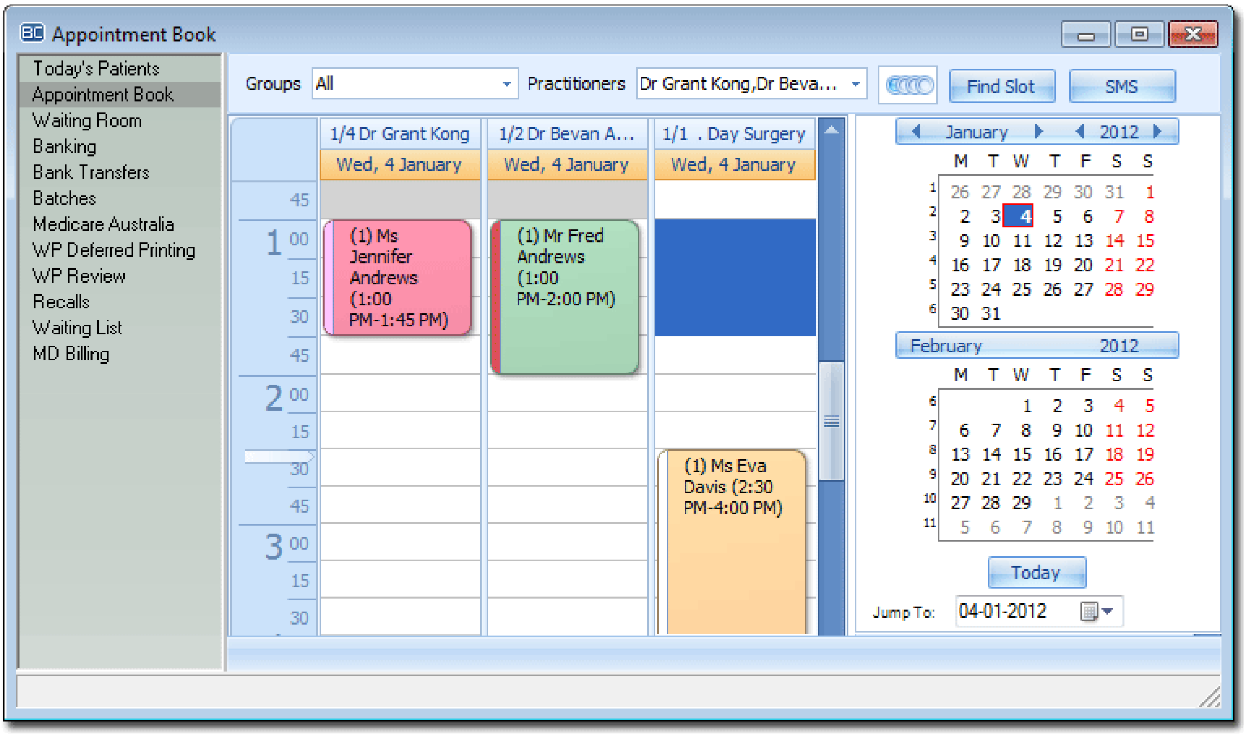
Notes:

- The **Valid For** text box is determined by the information contained in the referring practitioner's record, but can be overtyped as needed.
- The **Commencing** date is the date of the first appointment for this new referral. By default, the current day's date is used but can be overtyped if required.
- The **Letter Written** date is the date the referral was written. Pressing **Tab** sets this to match the commencing date.
- The **Doctor's Reference** refers to any identifying reference notation on the original hard-copy referral.

Appointments

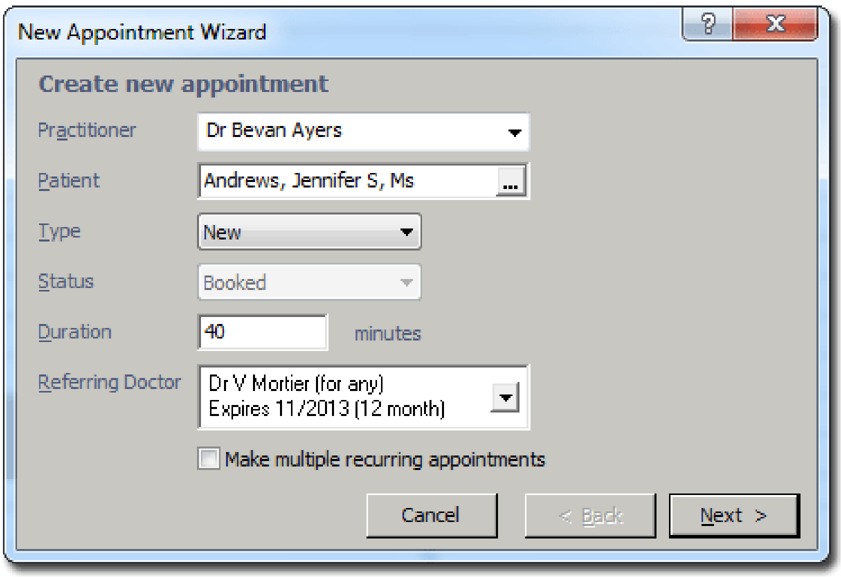
Scheduling an Appointment for a Patient with a Current Referral

Within the Appointment Book, select the day and time via the embedded calendar tools. All appointments recorded for that day will be displayed.



1. Locate the column for the associated practitioner.
2. Locate any empty time slot for their schedule.
3. Then either;
   - Double-click the slot, or
   - Right-click the slot and select **Add Appointment** from the menu that appears.

4. The **New Appointment Wizard** appears.



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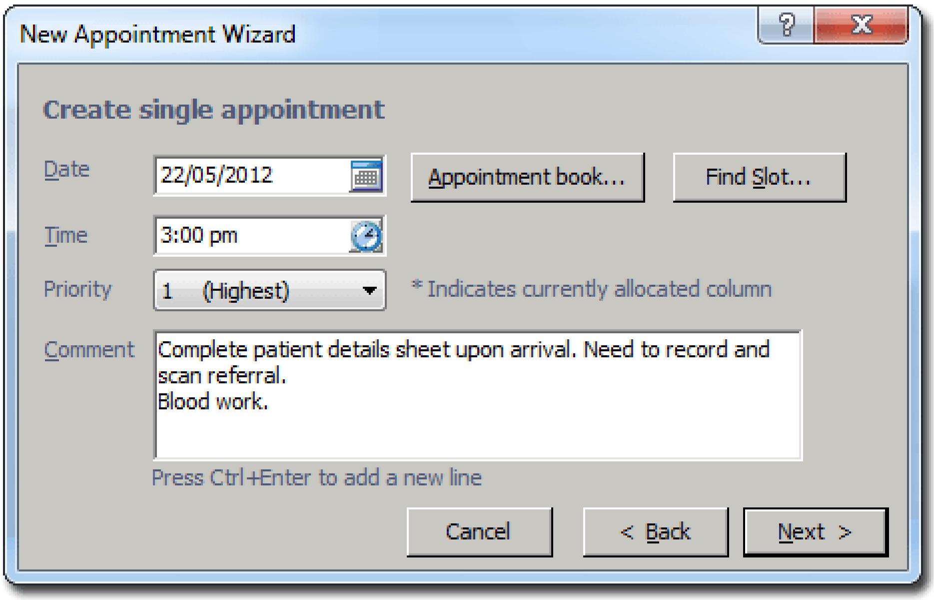
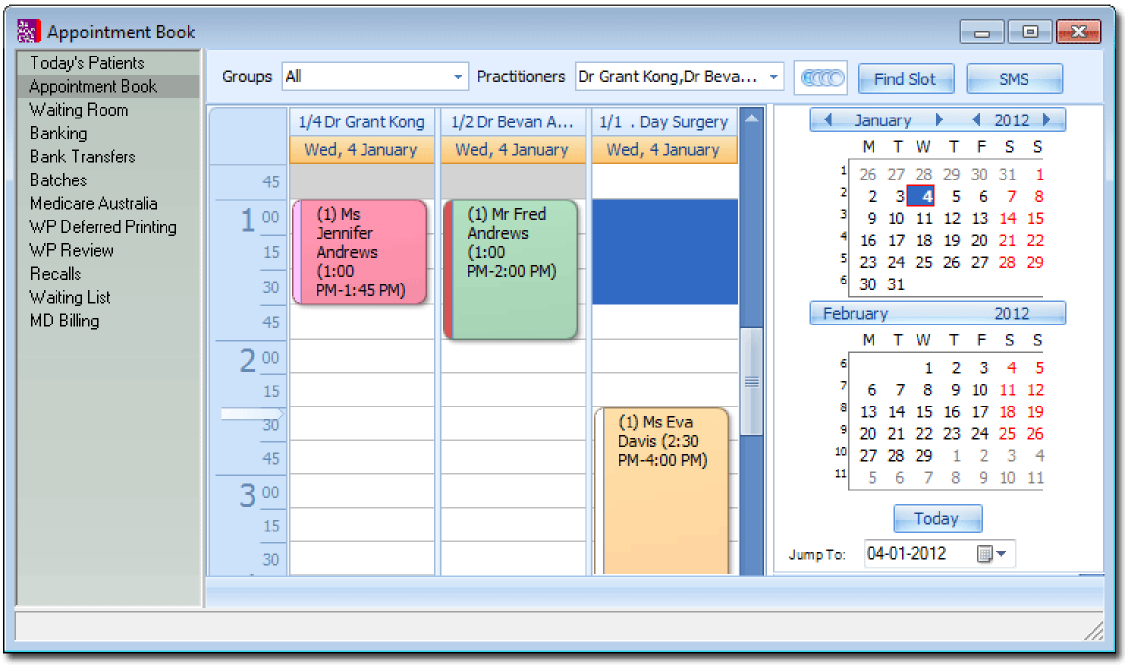
5. Type the patient's name into the **Patient** text box.
6. Select the type of appointment from the associated dropdown list.
7. Click Next >
   A free comment space is provided to record any relevant information regarding the patient's appointment.
8. Click Next > and then Finish to return to the Appointment Book.



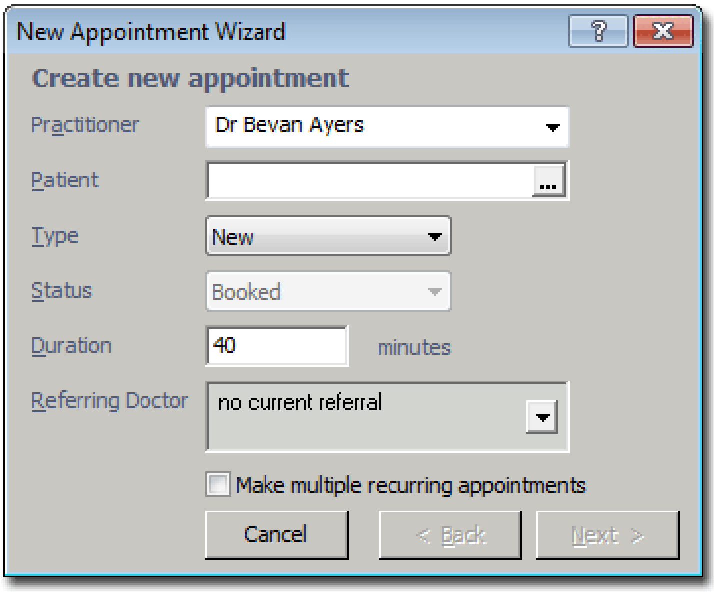
Scheduling an Appointment for a Patient with an Expired Referral

Within the Appointment Book, select the day and time via the embedded calendar tools. All appointments recorded for that day will be displayed.

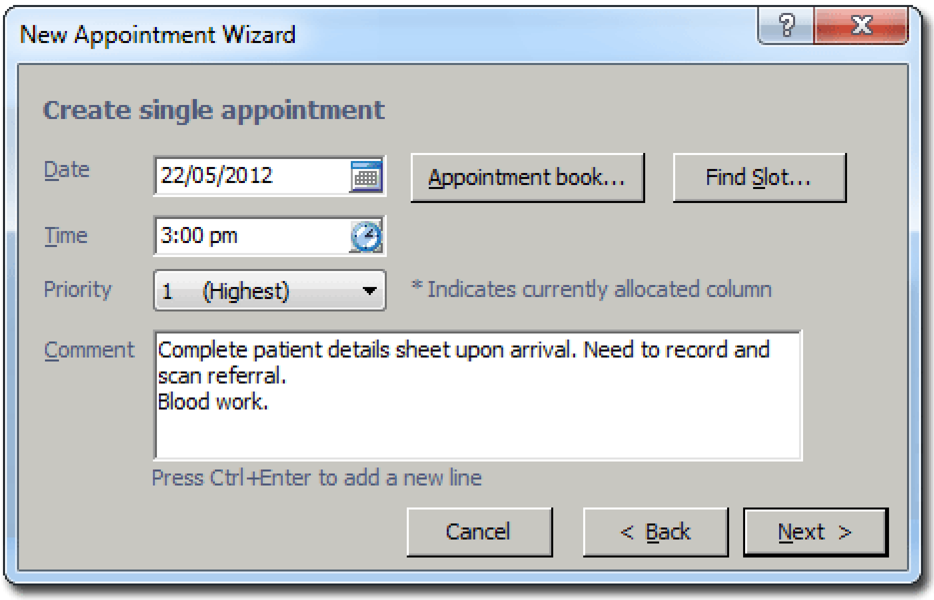


1. Locate the column for the associated practitioner.
2. Locate any empty time slot for their schedule.
3. Then either;
   - Double-click the slot, or
   - Right-click the slot and select **Add Appointment** from the menu that appears.

4. The **New Appointment Wizard** appears.



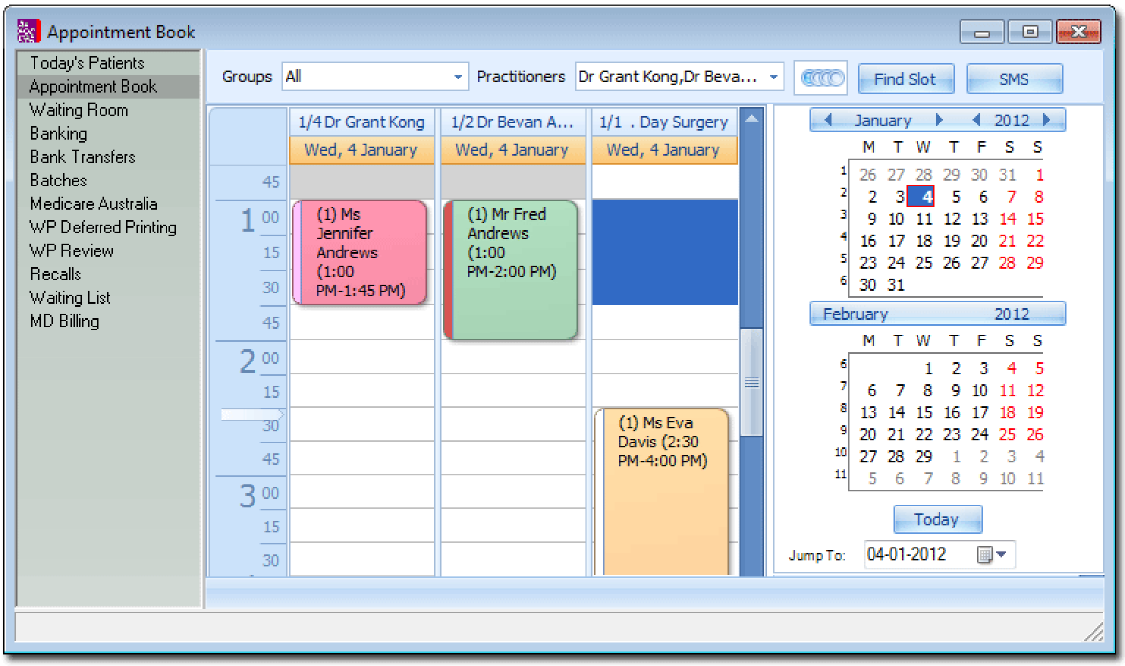
5. As there is no current referral, click the ▼ button and then click Add The **New Referral** window appears. Complete the referral information, as explained in **Creating Referrals**.



6. Click Next > A free comment space is provided to record any relevant information regarding the patient's appointment.
7. Click Next > and then Finish to return to the Appointment Book.

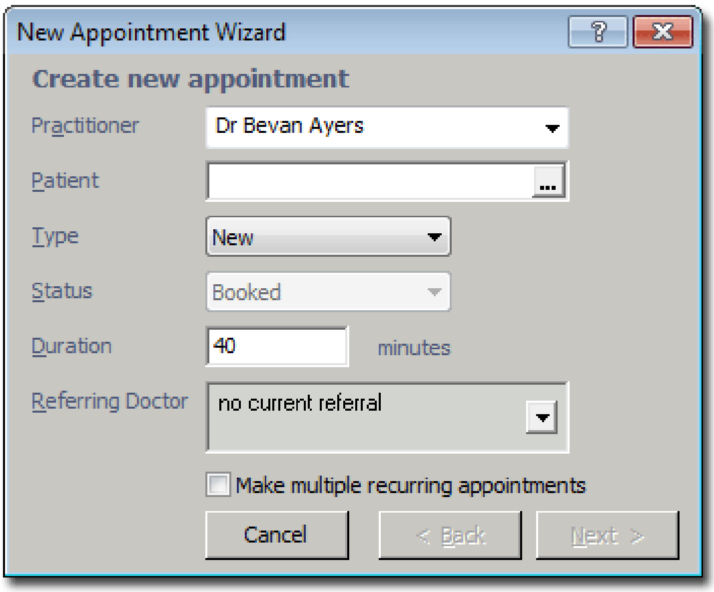
Scheduling an Appointment for a New Patient

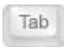
Within the Appointment Book, select the day and time via the embedded calendar tools. All appointments recorded for that day will be displayed.



1. Locate the column for the associated practitioner.
2. Locate any empty time slot for their schedule.
3. Then either;
   - Double-click the slot, or
   - Right-click the slot and select **Add Appointment** from the menu that appears.

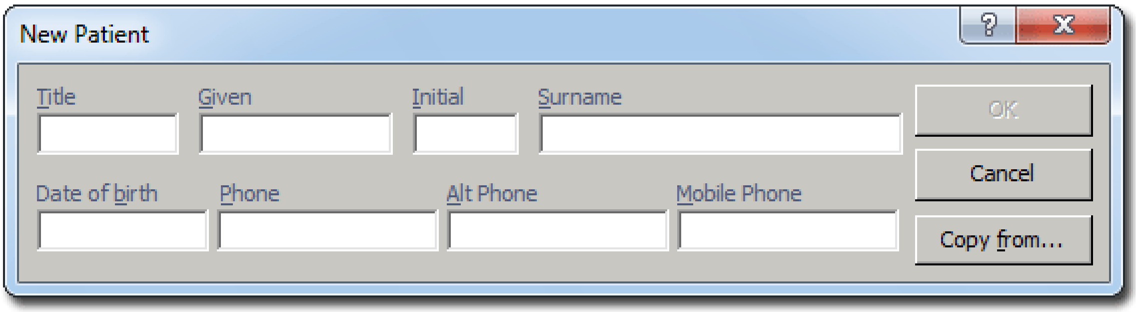
4. The **New Appointment Wizard** appears.



5. Because this is a new patient, and they do not yet exist in the MedicalDirector Blue Chip database, you will create their record now. Type in the patient's surname into the **Patient** text box and then press 

The **Open** window appears. This gives you another opportunity to check whether the patient record already exists.
6. If you need to create a new patient record, click 

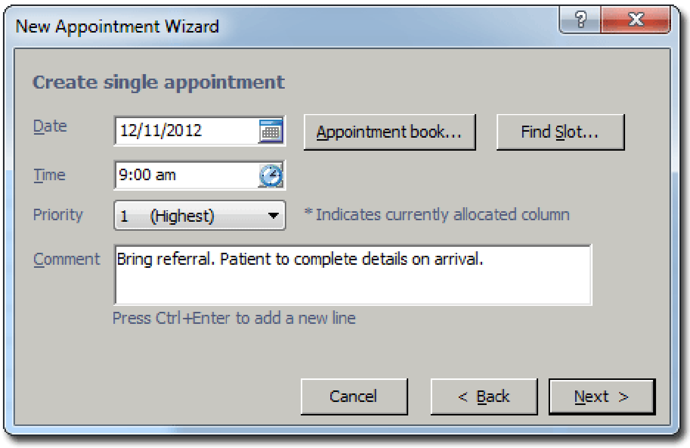
The **New Patient** window appears.



5. Complete details as desired. Although the 'Given' and 'Surname' fields are the only two required, it is recommended to record the patient's contact phone number(s) and Date of Birth to minimise the risk of creating duplicate patient records.
7. Click 

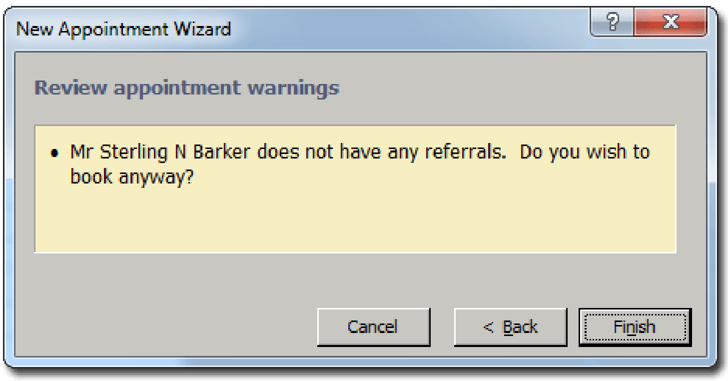
to confirm and save the patient's record. You will be returned to the New Appointment Wizard.
8. Click 

to continue. Record any relevant information regarding the appointment, such as reminding the patient to bring in their referral and a reminder to staff to ask the patient to complete a patient details form (either paper based or electronic in MedicalDirector Blue Chip) by way of an Appointment comment.



9. Click 

to continue. You will be alerted to the fact that this patient does not have a referral.

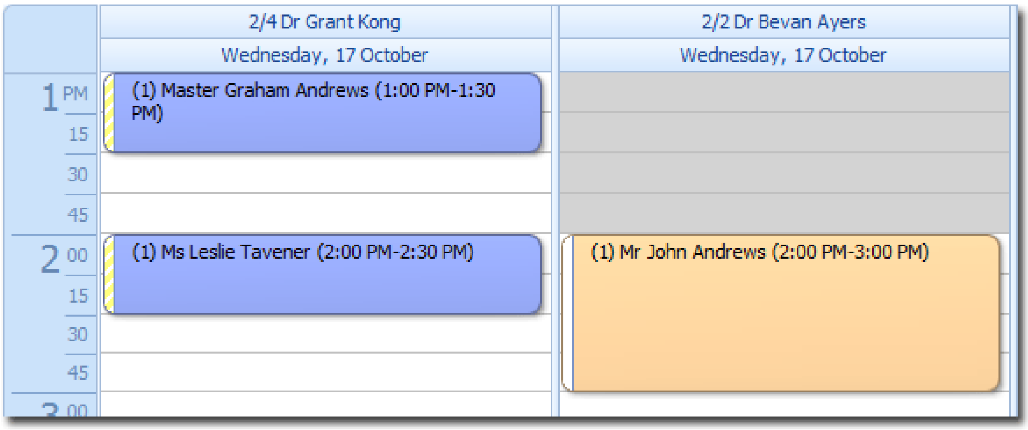


10. Click 

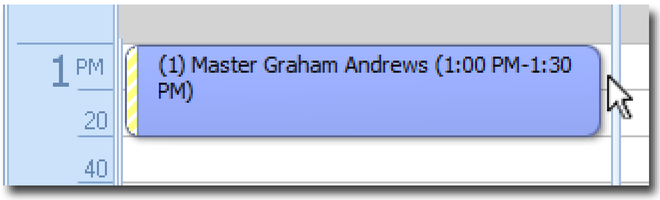
to confirm, and schedule the appointment.

Double-book a Patient

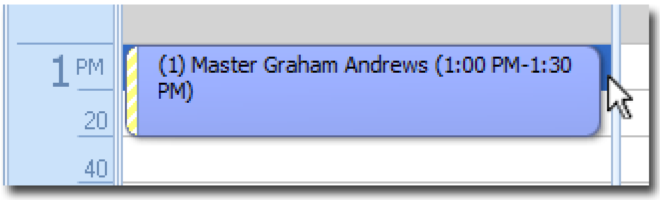
1. Create the first appointment. See Appointments for more information.



2. Locate the blank space to the right of the current appointment.



3. Click within this blank space to select the same time slot of the current appointment.

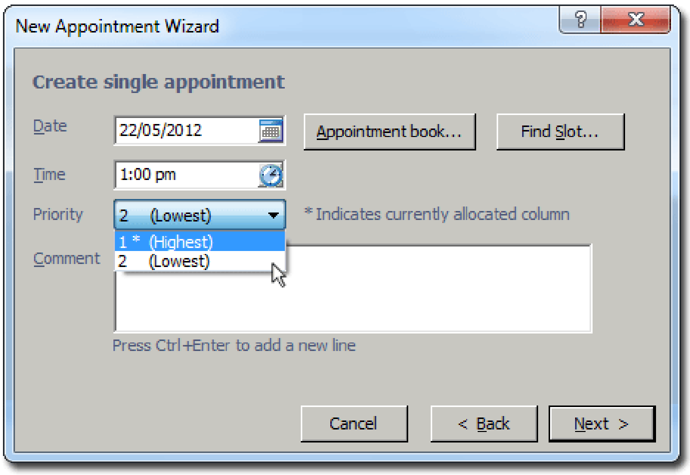


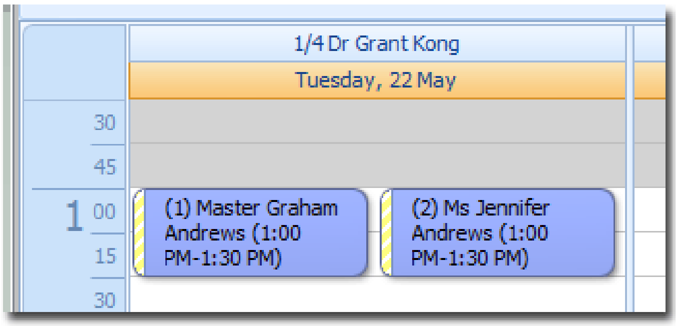
4. Create the second appointment. Because you are attempting to book multiple appointments to the same time slot, you will be alerted to this.

5. If you *were* to click Finish at this point, MedicalDirector Blue Chip assumes that you want this new appointment to take priority over the existing appointment; both appointments will be scheduled for the same time slot, but this appointment will be flagged as 'Appointment No.1'. If this is what you want, click Finish now, and go to Step 8. Otherwise, continue now to Step 6.

6. Click < Back You will be returned to the previous window where you can modify the priority of this appointment, via the drop-down list provided.
7. Select a different priority for this appointment. Where an * appears next to a priority level, this indicates that the priority level has already been assigned to an existing appointment.
8. When you return to the Appointment Book, the multiple bookings will appear, as shown in the following example.

If you wish to change the priority of bookings, simply double-click a booking and modify the priority as explained.

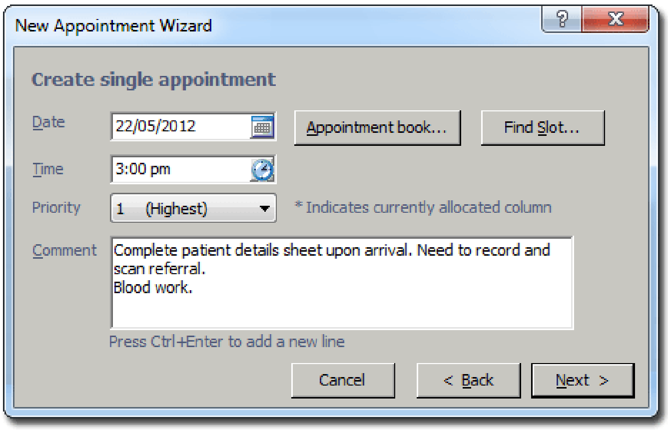




Appointment Comments

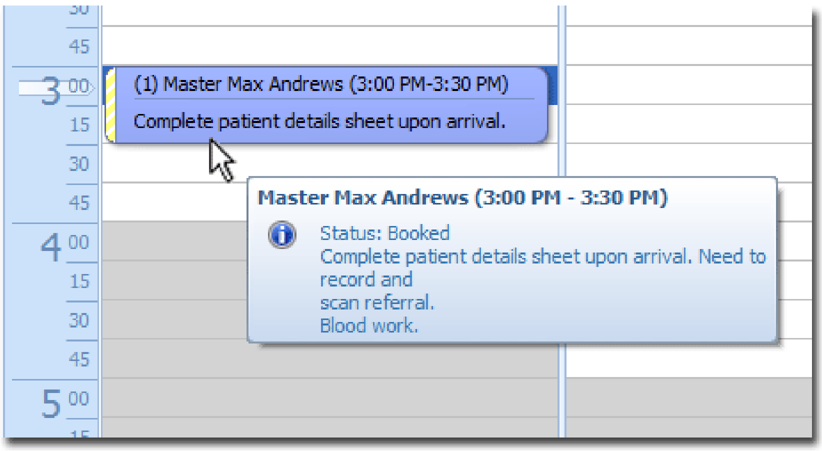
These are self-explanatory; they allow information relevant to the patient and/or their appointment to readily seen. Appointment comments can be recorded at the time of making the appointment or added later (see [Modifying Appointments](#)).

When entering comments, the text will automatically wrap to the next line when typing. If starting a new line is required, hold **Ctrl** and press **Enter** to force the cursor to start a new line. *Pressing Enter at this point is the same as clicking the OK button and the Appointment Wizard will exit.*



The example below shows an appointment with an included comment (the appointment is being edited – see Modifying an Appointment). The term 'blood work' has been started on a new line starting by pressing **Ctrl** + **Enter**.

After entering comments, click Next and continue the Appointment Wizard to complete the process to save the comment. The space taken for each appointment type will determine how much of the comment will be displayed on screen. To view the entire comment, hold the mouse over the appointment and the appointment summary.



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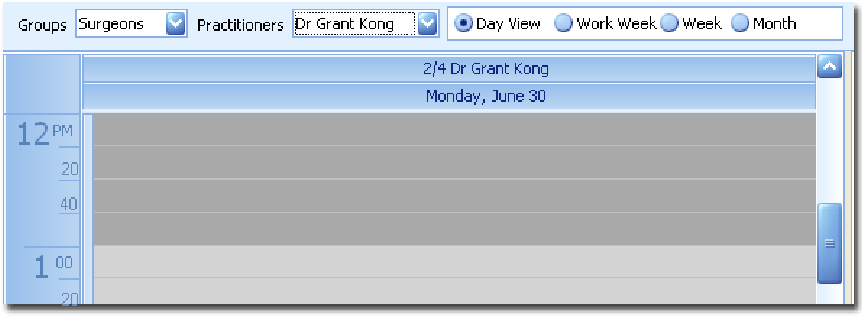
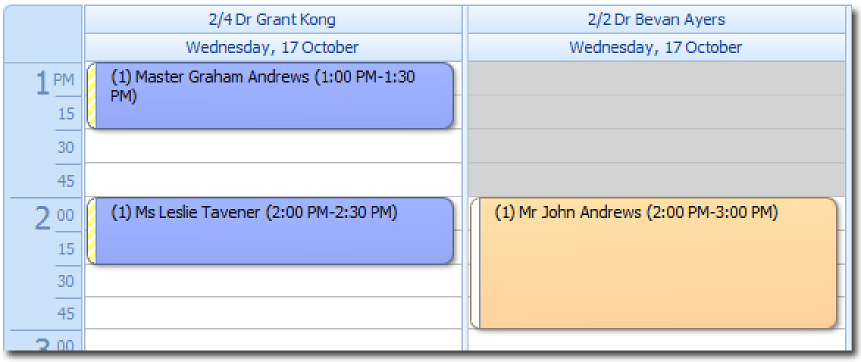
Recurring Appointments via the Appointment Book

1. Select the practitioner whose appointment schedule you wish to display, using the Practitioners drop-down list. You can also use this menu to display the appointment schedules for a group of practitioners. Note that after electing a group to display, you can show or hide individual members of that group using the secondary Display drop-down list. For example, the first image below shows that a group called Surgeons has been selected, and from that group, only Doctor Kong's schedule is currently displayed. The second image shows the same group, but with both Doctor Kong and Doctor Ayers displayed.

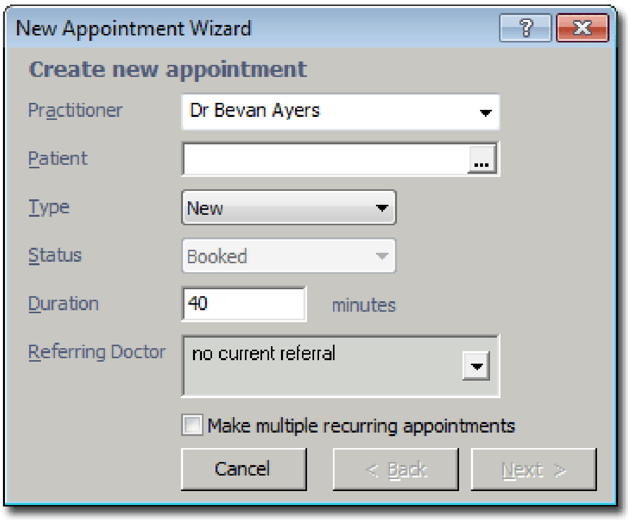




2. Select which period of schedule(s) you wish to display, using the associated option buttons. You can select from:

   - Day view
   - Work Week view
   - Week view, and
   - Month view

   You can also use the calendar at the right-hand side to show different time periods.



3. To add an appointment, locate an available slot, and then either:

   - Double-click the slot.
   - Right-click on the slot and select New Appointment.

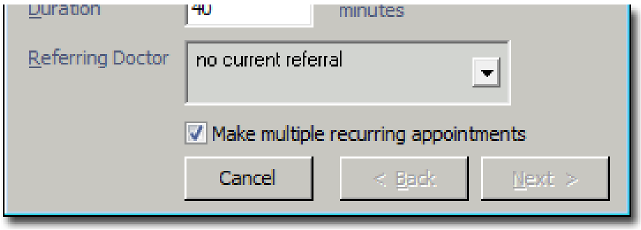
4. The **New Appointment Wizard** appears.

5. Click the ... button to select a patient to record the appointment for.

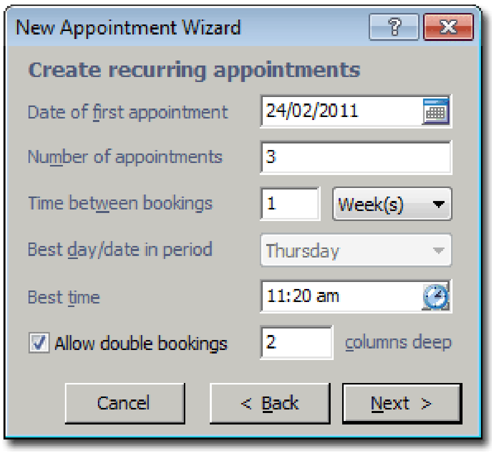
6. Select the purpose of the booking from the **Type** drop-down list.

7. Enter an appointment duration time if necessary. The duration defaults to the default time recorded for the selected Practitioner.

8. The Referring Doctor field automatically displays the patient's most current Referral (if available) and Referring Doctor. If necessary, you can create a new referral via this window, by clicking the drop-down arrow and then clicking the **Add** button on the secondary window that appears.
9. Tick the **Make Multiple Recurring Appointments** check box.

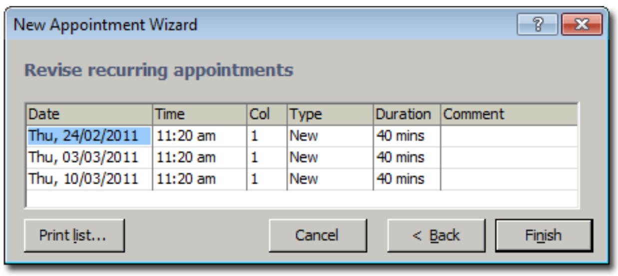


10. Click Next > to continue. The **Create Recurring Appointments** window appears.



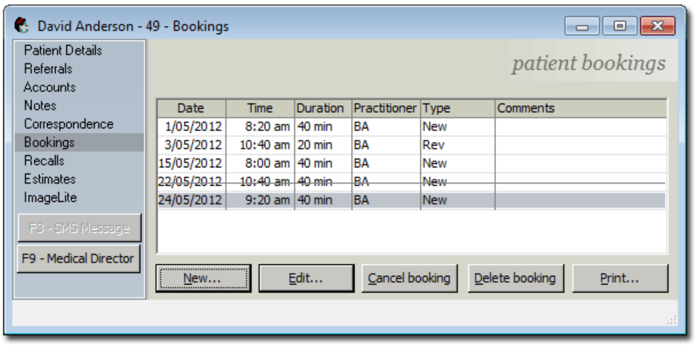
11. (Optional) If you wish to change the date of the first appointment, enter a new date in the Date field manually, or via the associated calendar button.
12. Enter the number of appointments you wish to book.
13. Stagger the appointments using the **Time Between Bookings** fields;
    - Enter the number of days, weeks or months between appointments.
    - Select whether the increment will be based on days, weeks or months using the associated drop-down list.
    - (Optional) Enter a Best Day / Date in Period. If you selected Day(s) as your Time Between Bookings, this option will not be available. Likewise, if you selected Week(s), the selection will default to the same day as that of your chosen Date of First Appointment. If however, you selected Month(s), you will have access to a drop-down list of day/date options such as specific days, or 'First Friday of Month', and so on.
14. Enter a preferred time for the appointment in the Best Time field, manually or via the associated clock button.
15. Select whether or not you will allow double-bookings by enabling/disabling check box, and then how many 'double-ups' you will permit.
16. Click Next > to continue. The **Revise Recurring Appointments** window appears.

    Take a moment to confirm that this appointment's schedule is suitable. You also have an opportunity to print the list from here. If you wish to make any edits, you can do so now, by clicking within the required cell and manually making the change.

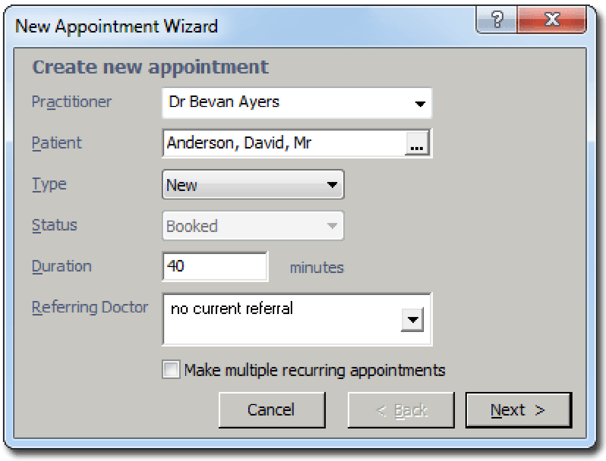


17. (Optional) If MedicalDirector Blue Chip determines it necessary to present you with any warnings about the appointments you wish to record, the Next > button will be made available. Click this to reveal the Review Appointment Warnings window.
18. Click Finish when you are ready to record the range of multiple appointments. You are returned to the Patient Bookings window, where the appointment details are now available. The new appointments are also entered in the Appointment Book.

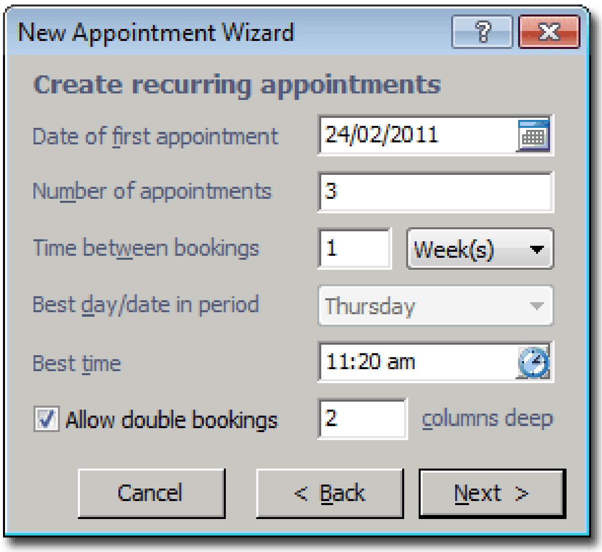
Recurring Appointments via the Patient Explorer



1. Ensure you have opened a patient's record, and are viewing the Patient Explorer.
2. Select the **Bookings** margin menu item. The **Patient Bookings** window appears.
3. Click New... The **Create New Appointment** window appears. As you are recording a new booking via a patient's file, the patient's name is automatically displayed in the Patient field. The Status field is initially disabled, with 'Booked' selected by default. This field becomes enabled when the patient arrives and the status is changed via the Waiting Room.



4. Select a Practitioner from the **Practitioner** drop-down list. Only practitioners recorded in MedicalDirector Blue Chip will be available.
5. Select the purpose of the booking from the **Type** drop-down list.
6. Enter an appointment duration time if necessary. The duration defaults to the default time recorded for the selected Practitioner, via the Appointments tab of Practitioner Setup.
7. The Referring Doctor field automatically displays the patient's most current Referral (if available) and Referring Doctor. If necessary, you can create a new referral via this window by clicking the drop-down arrow and then clicking the **Add** button on the secondary window that appears.
8. Tick the **Make Multiple Recurring Appointments** check box.
9. Click the **Next** button to continue. The **Create Recurring Appointments** window appears.
10. Enter a date for the first appointment in the Date field manually, or via the associated calendar button.



11. Enter the number of appointments you wish to book.
12. Stagger the appointments using the Time Between Bookings fields;
    - Enter the number of days/weeks/months between appointments, and select whether the increment will be based on days, weeks or months using the associated drop-down list.
    - (Optional) Enter a Best Day/Date in Period. If you selected Day(s) as your Time-Between-Bookings, this option will not be available. Likewise, if you selected Week(s), the selection will default to the same day as that of your chosen Date of First Appointment (Step 10). If however, you selected Month(s), you will have access to a drop-down list of day/date options such as specific days, or 'First Friday of Month', and so on.
13. Enter a preferred time for the appointment in the Best Time field, either manually or via the button.
14. Select whether or not you will allow double-bookings by enabling/disabling check box, and then how many 'double-ups' you will permit.
15. Click Next > to continue. The **Revise Recurring Appointments** window appears.

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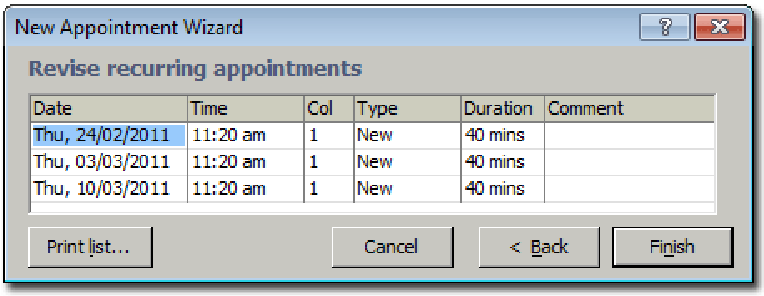
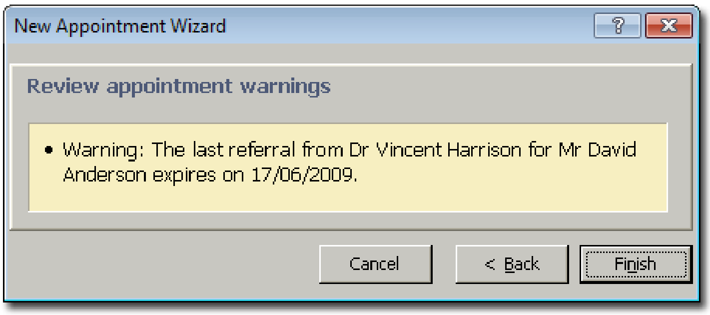


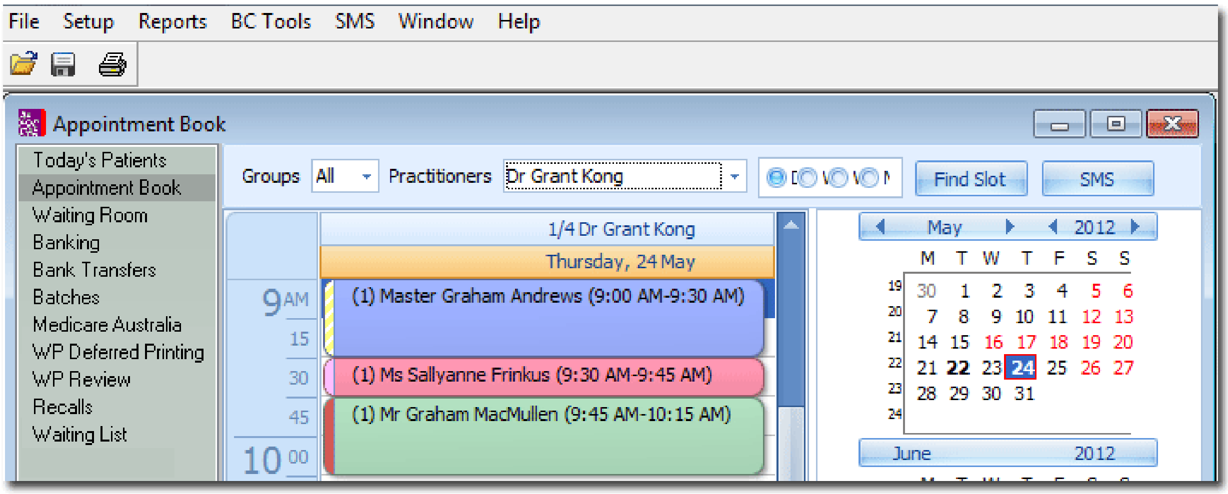
16. Take a moment to confirm that this appointments schedule is suitable. You also have an opportunity to print the list from here.
17. (Optional) If MedicalDirector Blue Chip determines it necessary to present you with any warnings about the appointments you wish to record, the Next button will be made available. Click this to reveal the **Review Appointment Warnings** window.

18. Click  when you are ready to record the range of multiple appointments. You are returned to the Patient Bookings window, where the appointment details are now available. The new appointments are also entered in the Appointment Book.

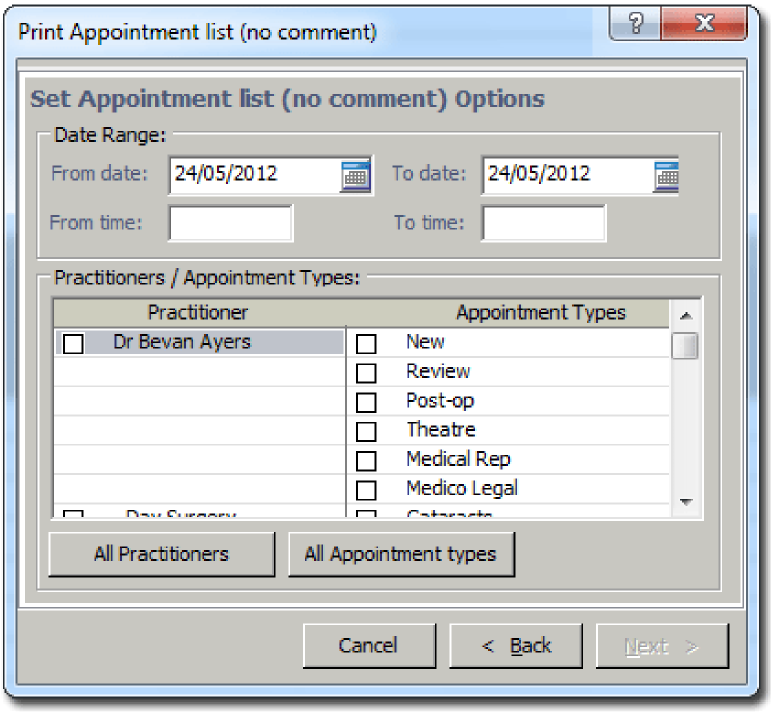


Printing Appointment Reports (Lists)

1. Within the Appointment Book, use the calendar tool to select the day of the appointments you wish to print. You can only select one day at a time.



2. Click the button. The **Print Report** window appears.
3. Select one of the Appointment reports.
4. Click Next > to continue.
5. Select one or more practitioners and appointment types to print. You must make a select from both sections to continue.
6. Click Next >
7. Set print options as desired and then click Next > to print the list of appointments.



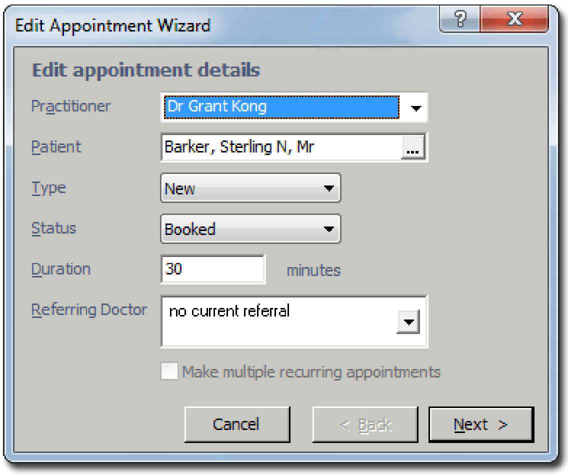
Modifying Appointments

There are many ways to edit existing appointments. The Outlook™ version of the Appointment Book allows users to edit appointment times and durations directly on the screen as well as via the following procedure.

Overview of the Edit Appointment Wizard

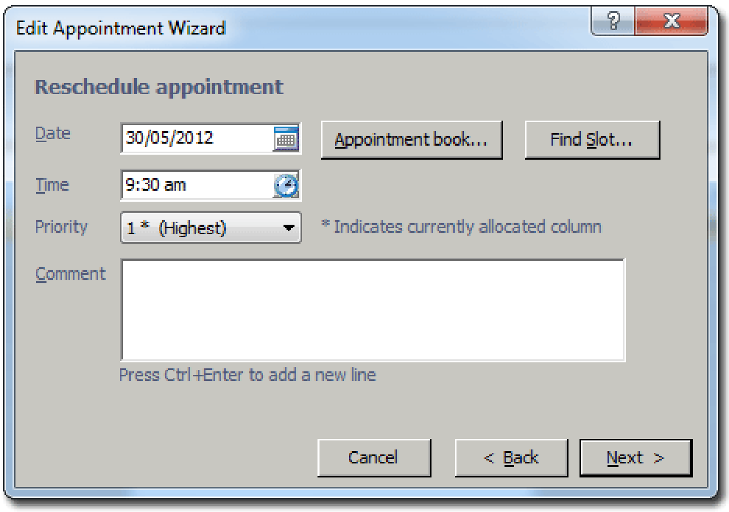
When you first access the Edit Appointment Wizard (via one of the methods explained following), a < Back button appears on it. Clicking this button will alter the window slightly, by adding a Practitioner field (as shown below), giving you an opportunity to select a different practitioner should you wish to.

Practitioner	Can be changed to another available from the drop-down list.
Patient	Can be changed by typing a new surname and pressing the **Tab** key or clicking the ... button to open the Search Patient facility.
Type	Can change the type of Appointment.
Status	Can change the patient's status from booked to waiting, in consultation, departed or no show (see Using the Diary in Session).
Duration	Can be extended if a longer appointment is required.



To Edit an Appointment using the Appointment Wizard

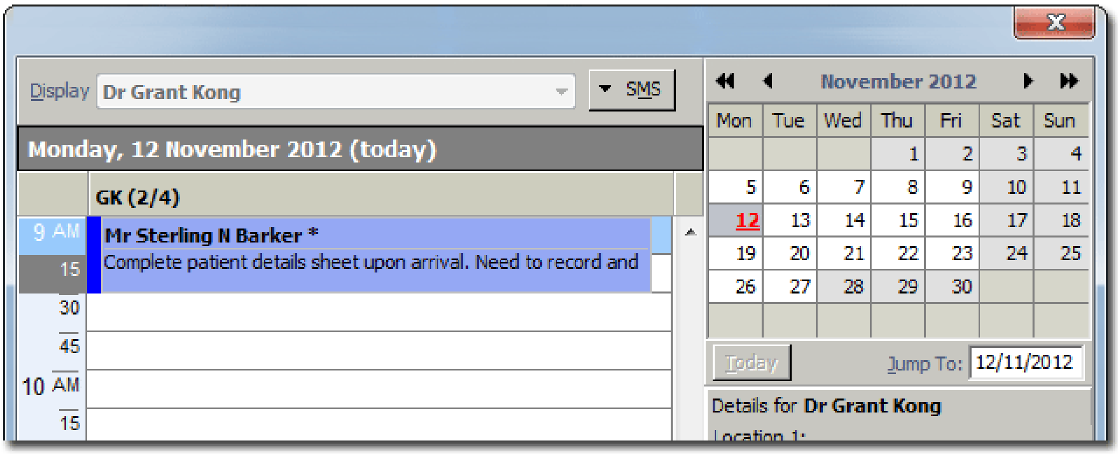
1. Left click to select the appointment.
2. Right-click the appointment to bring up the context menu.
3. Click Edit... The Edit Appointment Wizard appears.



Here the date, time and priority can be edited as well as adding or editing an appointment comment. You can type adjustments manually at this point.

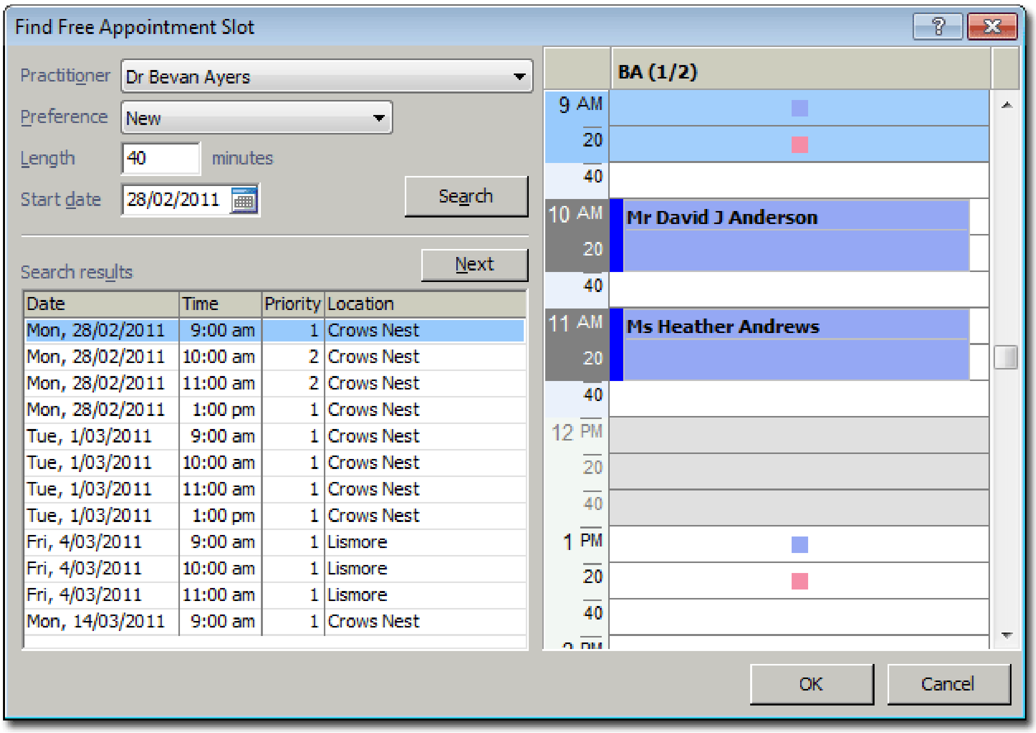
Using the Appointment Book Button

Clicking Appointment book... on the Edit Appointment Wizard window displays a smaller windowed appointment book. Use the calendar control to find a new suitable day (and time if required).



Using the Find Slot Button

The Find Slot feature will only work if the Practice has entered predetermined appointment times into its plan. For example, a doctor may wish to see new patients on the hour and follow-ups in the remaining time of that hour, with post-ops after lunch. Click Find Slot on the Edit Appointment Wizard window to open the **Find Free Appointment Slot** window.



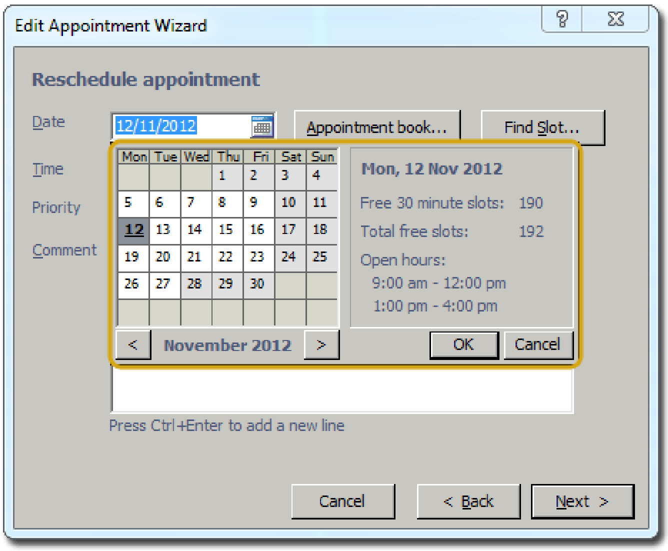
Date	Time	Priority	Location
Mon, 28/02/2011	9:00 am	1	Crows Nest
Mon, 28/02/2011	10:00 am	2	Crows Nest
Mon, 28/02/2011	11:00 am	2	Crows Nest
Mon, 28/02/2011	1:00 pm	1	Crows Nest
Tue, 1/03/2011	9:00 am	1	Crows Nest
Tue, 1/03/2011	10:00 am	1	Crows Nest
Tue, 1/03/2011	11:00 am	1	Crows Nest
Tue, 1/03/2011	1:00 pm	1	Crows Nest
Fri, 4/03/2011	9:00 am	1	Lismore
Fri, 4/03/2011	10:00 am	1	Lismore
Fri, 4/03/2011	11:00 am	1	Lismore
Mon, 14/03/2011	9:00 am	1	Crows Nest

Click Search to commence the search. The search may take a moment. After the search has completed, the first twelve free slots will be displayed in the Search Results section. If these slots are unsuitable, click Next > to display the next twelve free slots.

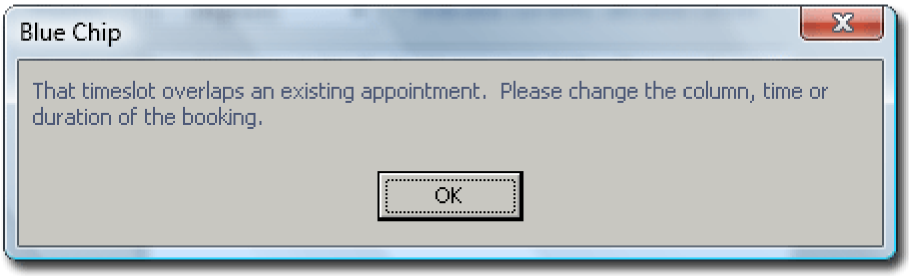
Select your desired appointment slot by either clicking the dates and times on the left panel and then the OK button, or select an available time slot in the right-hand panel and then click the OK button. You will be returned to the Edit Appointment Wizard.

Changing the Appointment Date with the Calendar Control

Clicking the calendar button at the end of the date field displays a mini calendar, showing open slots.



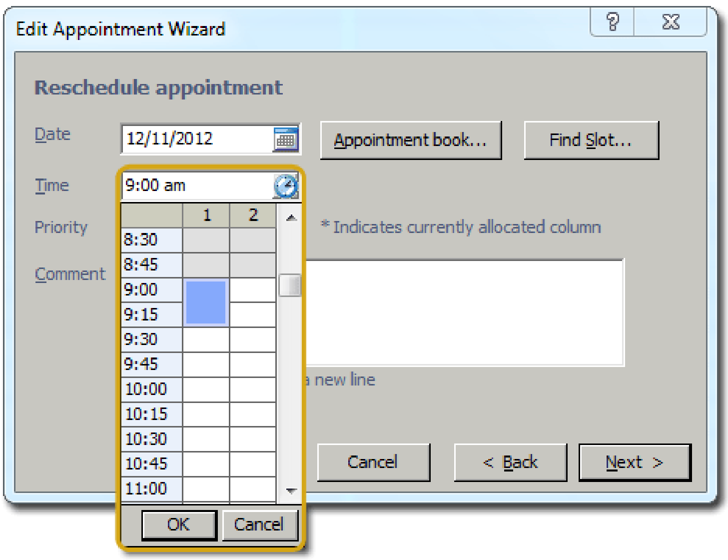
If the time clashes with the new date a message similar to the following may appear (depending on how MedicalDirector Blue Chip is configured).



At this point change the appointment time (if the day is still required).

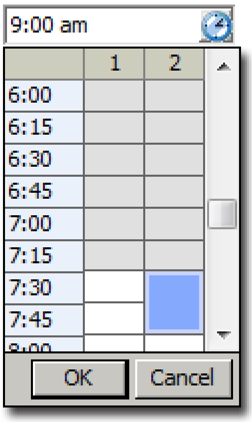
Changing the Appointment Time with the Time Control

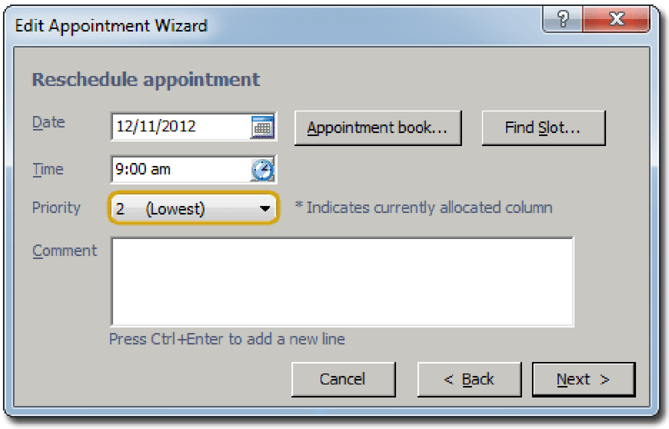
Click the clock button at the end of the Time field to display the free appointment times for the date displayed in the date field.



Click to select an available time, and then OK to confirm. You will be returned to the Edit Appointment Wizard.

Depending on how your MedicalDirector Blue Chip is configured, the appointment's priority will automatically default to **1 (Highest)** if it does not clash with another appointment. If you manually place the appointment into the second column, the Appointment Wizard will record the priority as **2 (Lowest)**.





Click Next > (and then Finish if there are no referrals associated with the appointment yet)

To Directly Edit an Appointment in the Appointment Book

Moving an Appointment

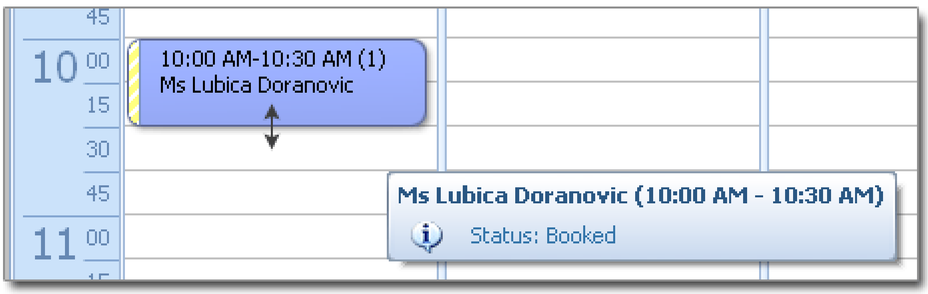
The drag-and-drop method will only work when moving appointments to either a different time slot or different practitioner if these are displayed on the screen at the time. To move the appointment to a different date, please refer to the Edit Appointment using the Appointment Wizard section above.

1. Left click and hold the mouse button down to select the appointment to move.
2. Drag the appointment to the required available time slot
3. Release the mouse button

Changing the Appointment Duration

This method allows the appointment's duration to be changed directly on the Appointment Book. The duration time is determined by the default unit of time as indicated on the Appointment Book's timeline.

1. Left click to select the appointment
2. Hold the cursor over the bottom of the appointment so that the cursor changes to a double-headed arrow (see below).



3. Drag to extend or contract the appointment's duration as required.

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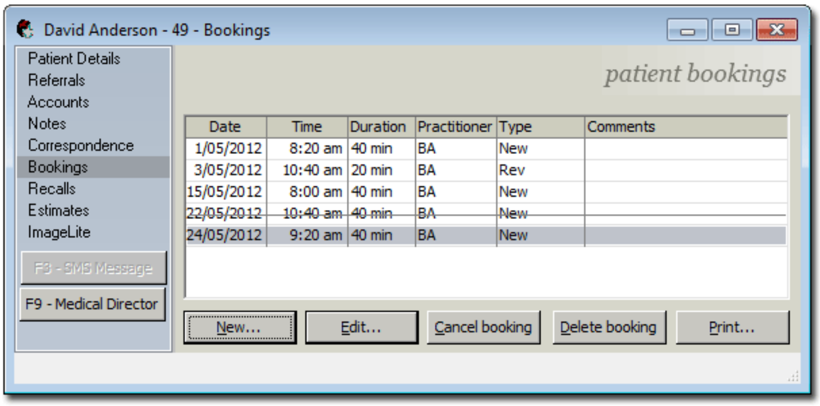
Finding an Appointment

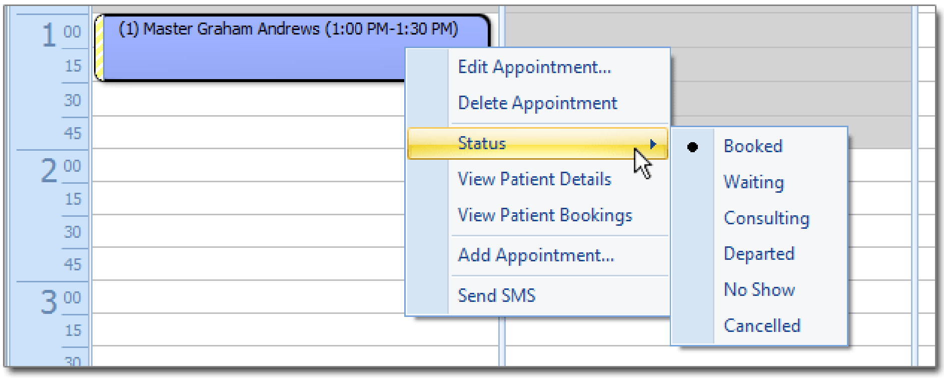
A common occurrence is when a patient telephones the Practice when they have forgotten the date of their next visit. Instead of searching the appointment book, the quickest and most efficient method is to use Bookings window in the patient's record.



From this screen, the patient's past and future appointments are listed, and they can be printed via  located at the bottom-right of the screen.

Cancelling or Deleting Appointments

Following are the steps required to cancel an appointment. When an appointment is cancelled, a line will be drawn through the patient's bookings and the appointment book will free-up the previously-occupied appointment. This process does not take into account any legitimate reason the patient may have had for cancelling. To accommodate this, before going to Status, click 'Edit Appointment' and add the reason to the appointment comment. Then when the appointment is cancelled, the reason appears in the patient's bookings history.



Locate and right-click the patient's appointment in the Appointment Book. A pop-up menu with a list of options is displayed;

- To indicate that a patient failed to turn up for their appointment, select Status > No Show from the pop-up menu. This will not delete the appointment from the book, but will place an X in the appointment on-screen.
- To cancel an appointment, select the Status > Cancelled from the pop-up menu. You are prompted to confirm the cancellation of the appointment. If you do not have permission to cancel an appointment, you will be notified accordingly when you attempt the cancellation.
- To delete an appointment, select the appointment and press the Delete key. You are prompted to confirm the deletion. The Delete appointment option should only be used if you have made a mistake and the appointment does not belong in the appointment book. If the selected Practitioner is inactive (deactivated), you will be unable to edit, change status of, or delete an appointment.

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SMS Reminders

SMS Reminders is a module that allows users to send SMS messages to mobile phone from within MedicalDirector Blue Chip. Message transfer is managed by a third party, with whom you must register in order to send SMS messages.

There are two components to upgrading your SMS registration:

- Initialising the new SMS registration from within MedicalDirector Blue Chip.
- Configuring your proxy in order to send scheduled SMS messages.

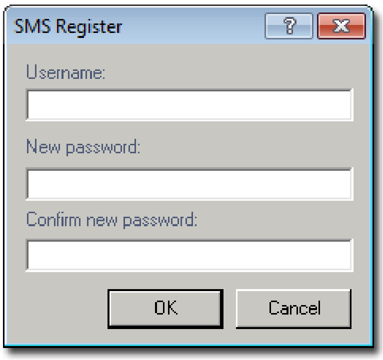
Initialising SMS Registration from within MedicalDirector Blue Chip

1. Ensure you have at least MedicalDirector Blue Chip 2.6.70
2. Ensure you log into MedicalDirector Blue Chip with a user who has permission to 'Change SMS Setup' in BC Secure.
3. Upon opening MedicalDirector Blue Chip you will be prompted to register for SMS reminders. Even if you had registered for SMS reminders in a previous version of MedicalDirector Blue Chip, you must re-register to make use of the new SMS messaging service.

   If this prompt does not appear, you can also register via **SMS > Setup SMS Reminders > Register for SMS** button.

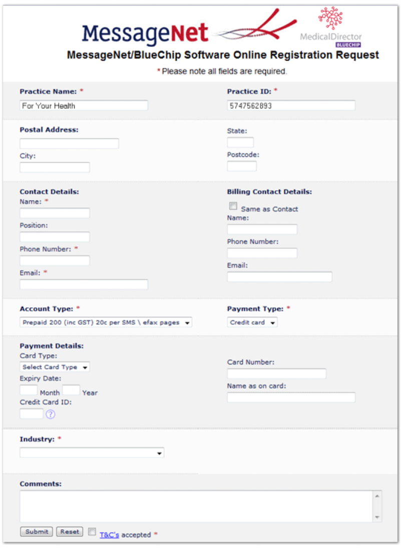
4. Click 

 The SMS Register prompt appears.

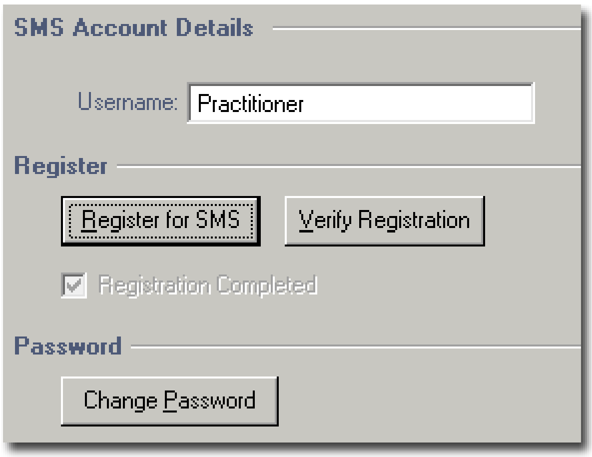


5. Enter a new Username and Password and then click 

 The registration information you enter will be validated immediately, and if invalid you will be prompted accordingly.
6. Your Internet browser will open, and attempt to connect with the MedicalDirector Blue Chip / MessageNet web page for SMS registration. On the registration form, the Practice ID and Practice Name fields should be automatically populated with your relevant data, as shown below.



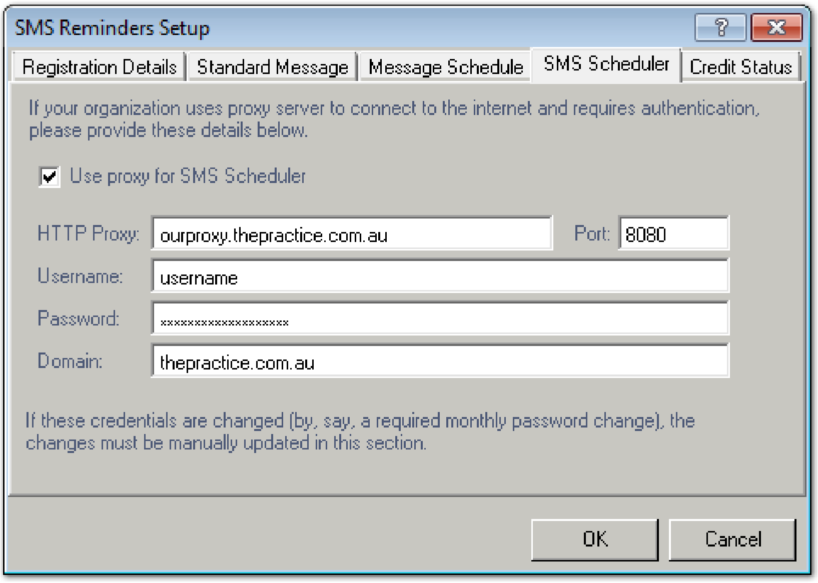
7. Once you have completed the registration form, click Submit You will be sent a verification email to the email address you entered within the registration form (above).
8. Once you have received the verification email, return to MedicalDirector Blue Chip and click Verify Registration to verify and save your registration information. Upon successful verification, the Username field will automatically be populated with your chosen user name, the **Registration Completed** check box will be ticked, and the Change Password button will become available.



9. You will also be prompted accordingly and presented with a request to setup your proxy settings.
10. Click OK to close the prompt, and then click OK in the SMS Reminders Setup window to complete the registration process.

Configuring your proxy in order to send scheduled SMS messages.

1. Within MedicalDirector Blue Chip select **SMS > Setup SMS Reminders**.
2. Select the **SMS Scheduler** tab.
3. Tick the **Use Proxy for SMS Scheduler** check box. The remaining fields will become available.
4. Enter your proxy details. Please consult your System Administrator if you need assistance obtaining this information.
5. Click OK on the SMS Reminders Setup window to save your settings.



Configuring Automated SMS Reminders

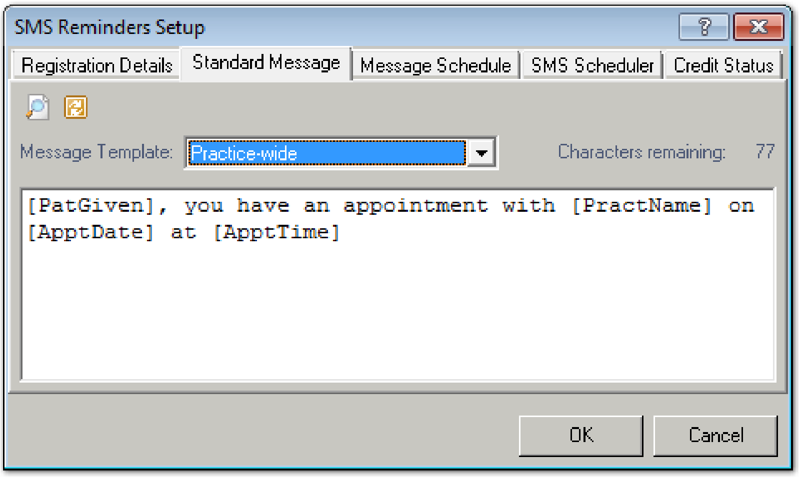
You can access the SMS Reminders Setup window at any time via SMS > Setup SMS Reminders, at which time you will be able to select from four tabs as explained below.

Only users with Change SMS Setup permission (in BC Secure), can view the SMS Setup window. Any user with Change Practice Setup permission prior to upgrading will automatically be granted Change SMS Setup permission following the upgrade.

To Setup your standard messages for SMS Reminders:

You can create standard messages (templates) for each of the Practitioners in your MedicalDirector Blue Chip database, as well as a default 'Practice-wide' standard message.

1. From the MedicalDirector Blue Chip main window select **SMS > Setup SMS Reminders**. The **SMS Reminders** window appears.
2. Select the **Standard Message** tab.
3. From the Message Template drop-down box, select whether you wish to edit the Practice-wide standard message or that for one of the Practitioners in your MedicalDirector Blue Chip database.
4. Create the standard message. You can enter a maximum of 160 alpha-numeric characters per message, as indicated at the top-right of the message body window. As you type, this number will decrease. With 20 or fewer characters remaining, this number is displayed in red.



By right-clicking in the message body you can access a menu of merge fields that you can then insert into your message at the insertion point. These field codes act as place holders for information, and will be replaced automatically when you send the message. For example, if you enter the field code [PatName], this will insert the name of the patient for whom you are creating the message. Note that you must click where you want to place the merge field before right-clicking and selecting it, to ensure that the field is inserted in the correct place.

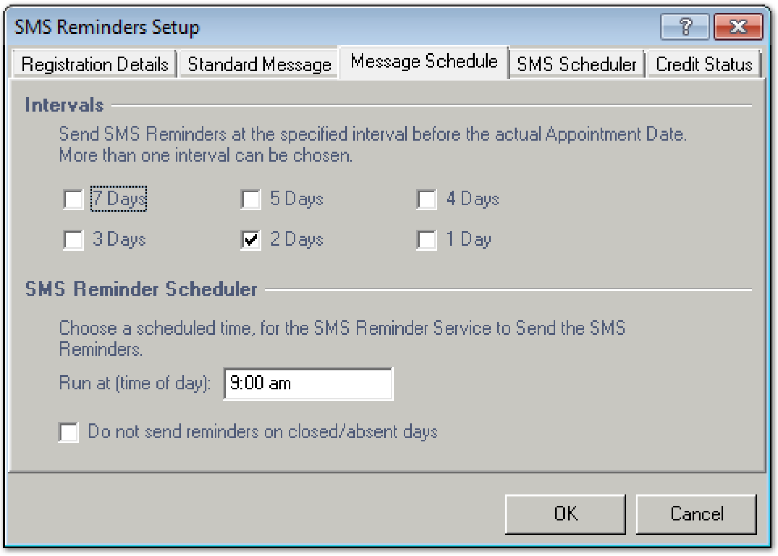
Keeping in mind that there is a 160-character limit for each message, you must note that MedicalDirector Blue Chip sets aside a number of characters for each field you add. You are still able to keep typing beyond what MedicalDirector Blue Chip thinks the limit will be, but the text appears in red with a strike-through as an indicator for you.

Press the (preview) button at the top-left of the SMS Reminders Setup window to preview your standard message. Press the (revert) button to revert the text you've entered to the default SMS Reminders message, which is "[PatGiven], you have an appointment with [PractName] on [ApptDate] at [ApptTime]".

5. Click OK to confirm and save your standard messages.

Scheduling Messages

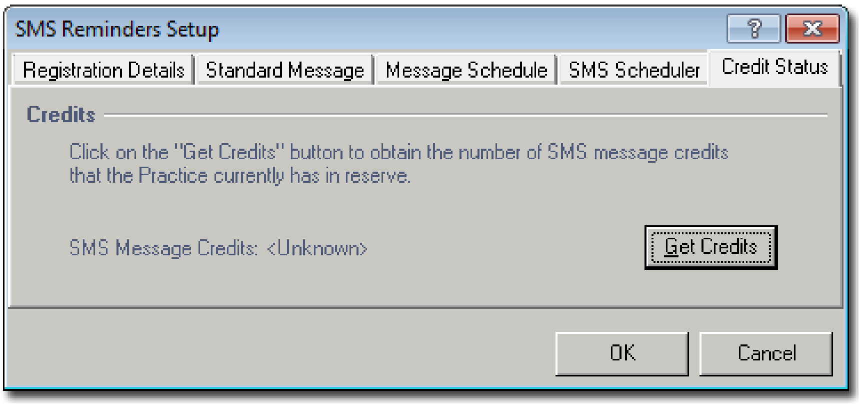
Select the **Message Schedule** tab to configure automatic messaging.



Intervals	This section allows you to set up the interval prior to patients' appointments at which SMS Reminder reminders will be sent.
Scheduler Time	Use the Run at (time of day) text box to enter a time at which you want your reminder messages to be sent. Note that MedicalDirector Blue Chip must be running on the computer you have selected at this time for the reminder messages to be sent.
Do Not Send Reminders... check box	When this check box is enabled, messages which would otherwise be sent on a closed or absent day will be sent on the last working day before the closed/absent day.

Credit Status

Each SMS message that is sent incurs a charge, deducted from the number of credits on your account. The Get Credits button on this window is used to determine the number of credits you have remaining.



When you click Get Credits SMS Reminders will attempt to contact the SMS service provider in order to determine the number of credits you have remaining with them. This functionality requires that you have active internet access from the computer you are using. The application may appear not to respond momentarily while this request is in progress. Note also that your credit quota is not stored with MedicalDirector Blue Chip. Therefore, whenever you access the Credit Status tab your Credits Remaining will be 'unknown' (as indicated in the preceding image) until you refresh this data by clicking Get Credits

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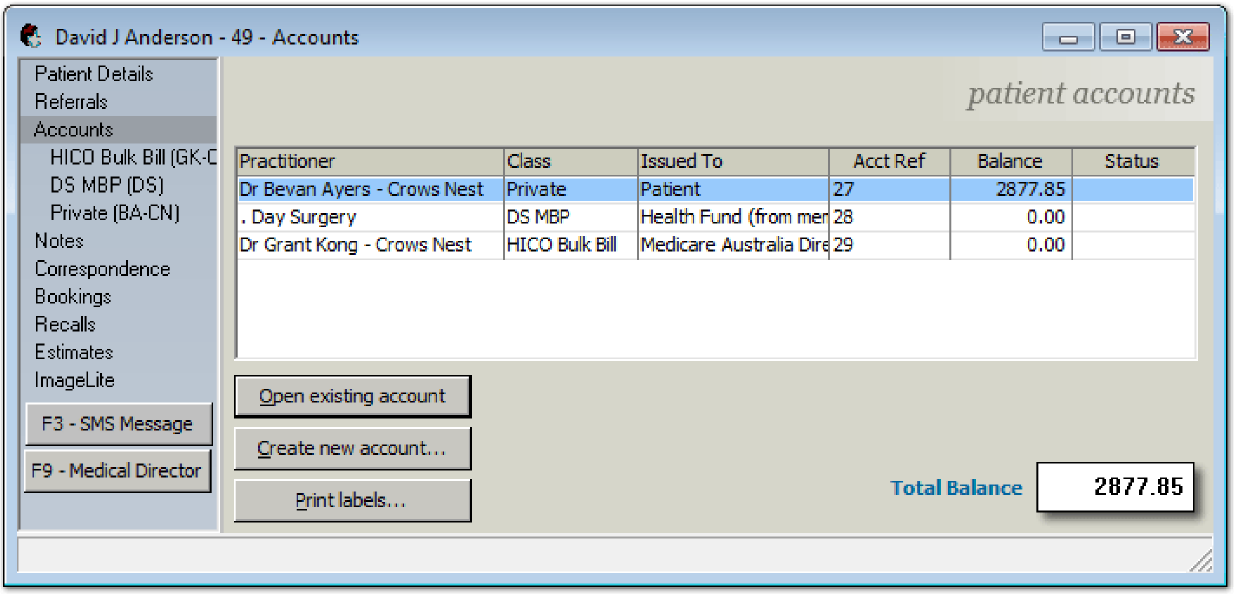
Creating Accounts

Creating Multiple Accounts for Single Patient

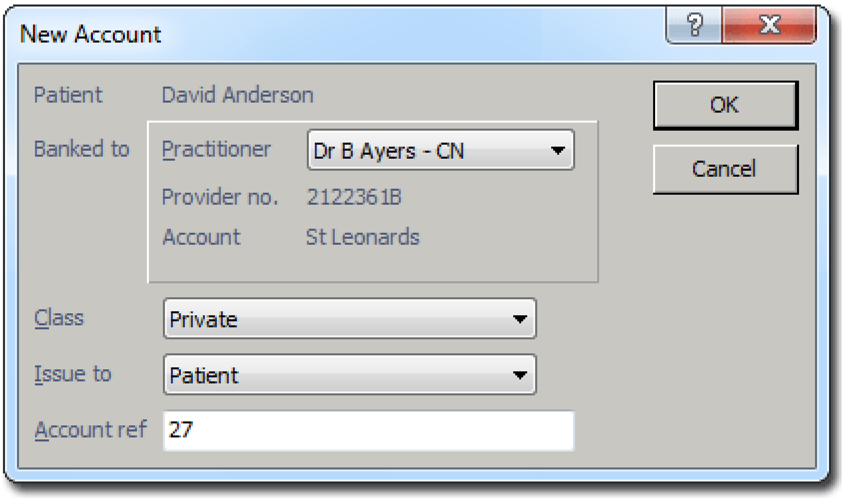
Classification of invoices and receipts is performed at the Accounts level. Transactions pertaining to Medicare Bulk Bill are separate to those where the patient is paying for their treatment, as are those where Worker's Compensation is paying. It is feasible and common for a single patient to have a range of accounts to accommodate a range of circumstances (or who is paying for the treatment). For the Practice, it enables accurate reporting in terms of services provided and financials.

Creating a Private Patient Account

1. From within the Patient Explorer, select the **Accounts** menu item.

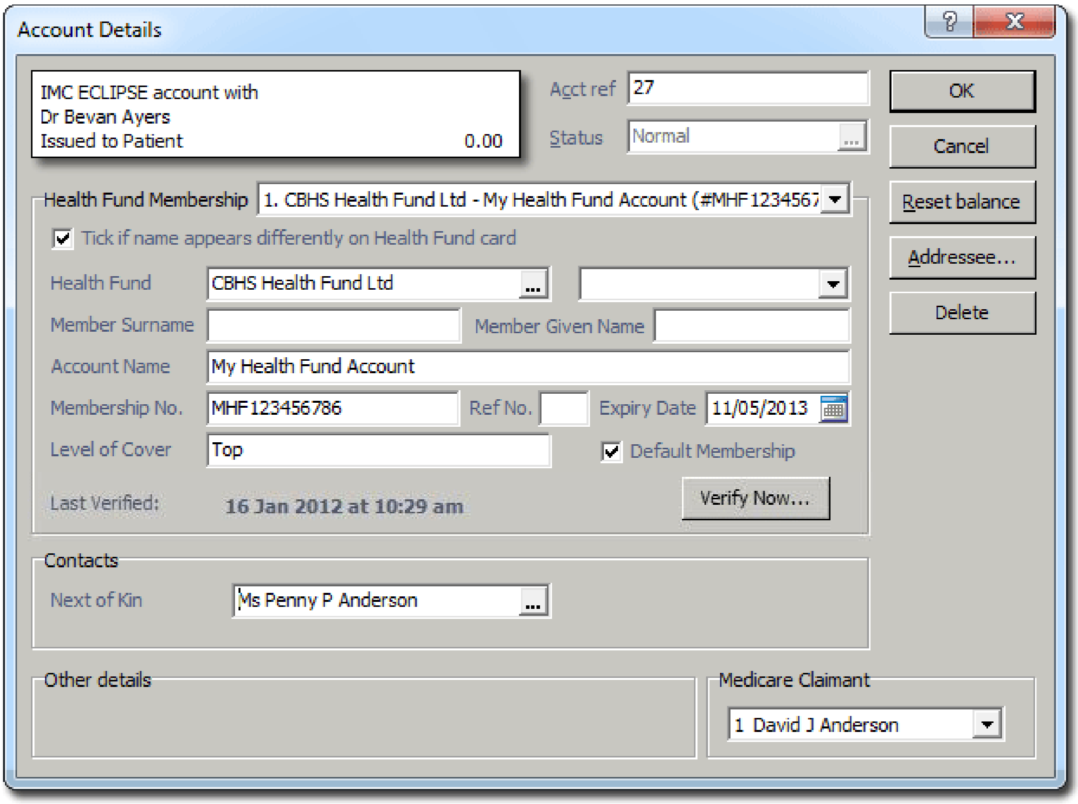


2. Click Create new account... The **New Account** window appears.



3. Select the **Practitioner** from the associated drop-down menu.
4. Select the **Class** of account (Private) and to whom the account will be normally issued to.

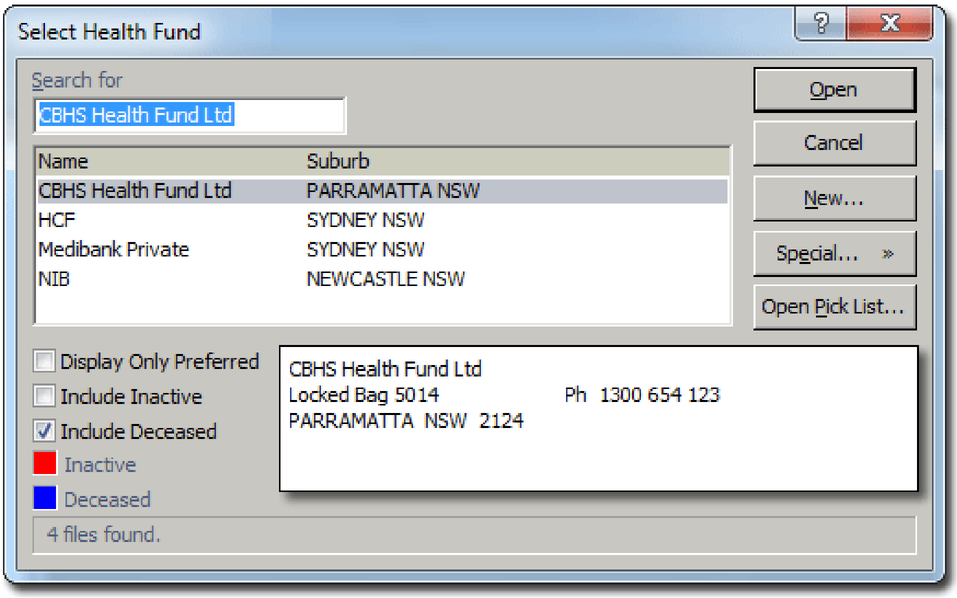
5. Click OK to confirm and save the details. The Account Details window appears, on which you record specific information about the account.



Entering Private Heath Fund Membership details

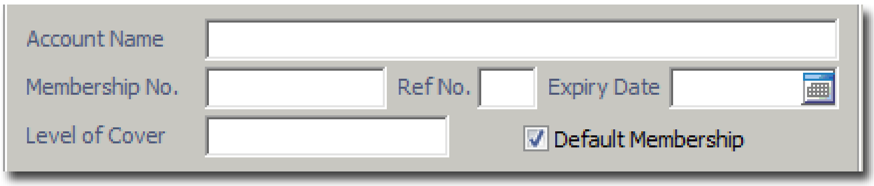
If the patient has Health Fund Membership, complete the following steps.

1. Select **New** from the **Health Fund Membership** drop down menu.
2. Type the Health Fund's name where indicated and press **Tab** or click the ... button to select a name from the list.

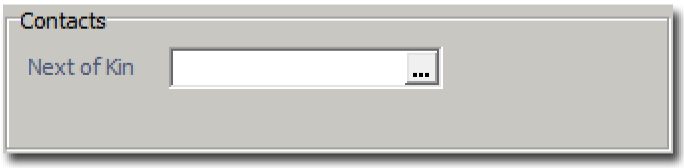


3. Click Open to accept the Health Fund name. You will be returned to the Account Details window. If the required Health Fund's name doesn't appear in this list, refer to Entering a New Health Fund. Complete the remaining details into the Health Fund Membership section.

4. Tick the **Default Membership** check box. This displays the patient's Health Fund Membership summary on the Patient Details window.

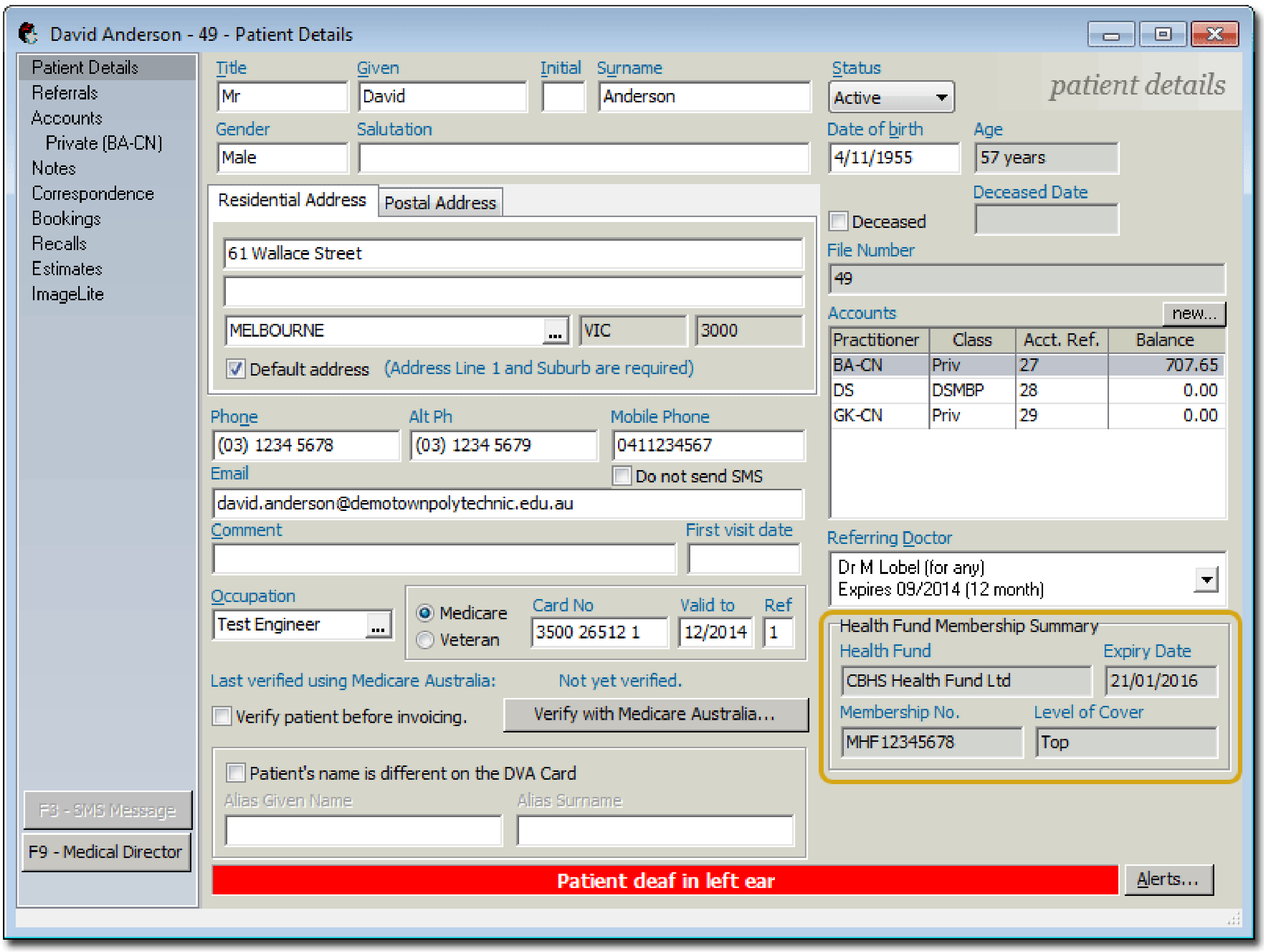


5. Next of Kin account contacts can be entered (see Parents database)



6. Click OK You will be returned to the Accounts window in the patient's record.

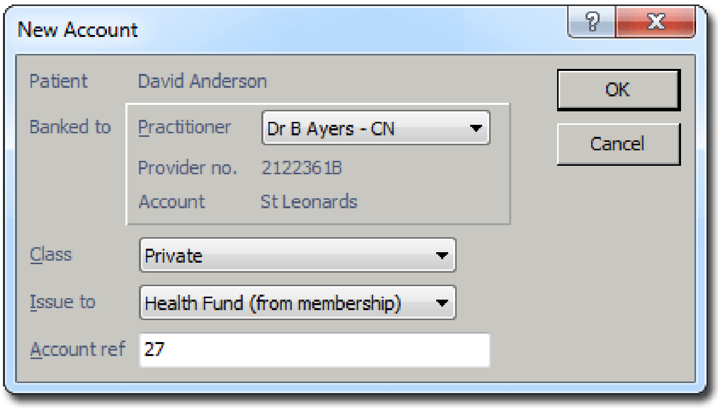
7. Select the **Patient Details** menu review the Health Fund Membership Summary section at the bottom-right of this window.



Creating a Private Health Fund Account

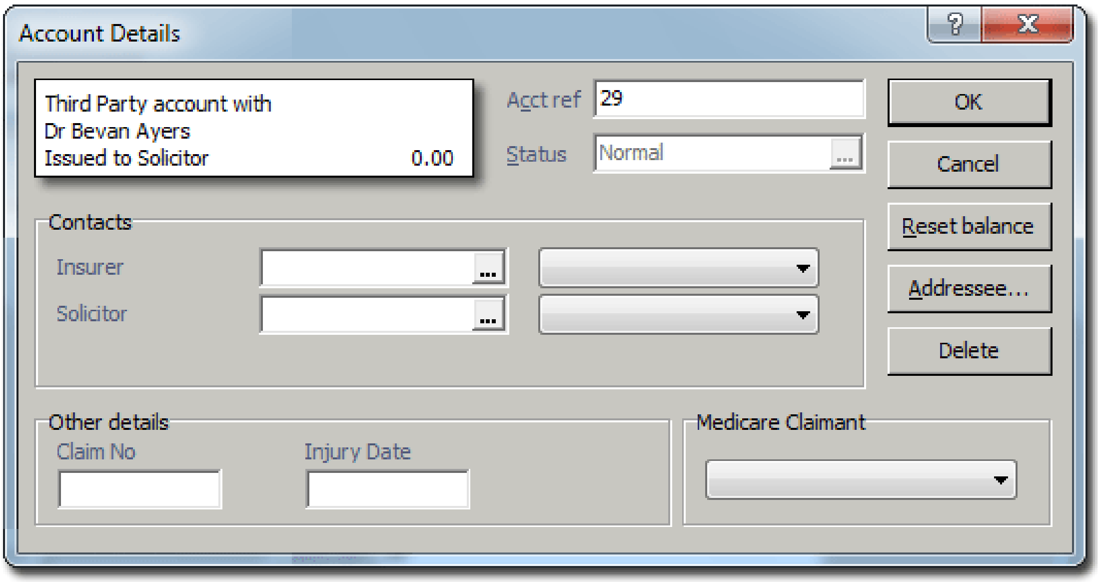
The following procedure outlines how to create an account for an insured Inpatient (where the Health Fund will pay for treatment). This procedure assumes the patient already has a private account, with all the relevant Health Fund details entered.

1. From the Patient Explorer select the **Accounts** menu item. The **Accounts** window appears (as shown above).
2. Click the **Create New Account** button. The **New Account** window appears.
3. Select the **Practitioner** from the associated drop-down menu.
4. Select the **Class** of account (**Health Fund** in this case), and to whom the account will be normally issued to.
5. Click OK The **Account Details** window appears. Complete other details as desired.
6. Click OK You will be returned to the Accounts window.



Creating a Third Party Account

1. From the Patient Explorer select the **Accounts** menu item. The **Accounts** window appears (as shown above).
2. Click the **Create New Account** button. The **New Account** window appears.
3. Select the **Practitioner** from the associated drop-down menu.
4. Select the **Class** of account (**Third Party** in this case), and to whom the account will be normally issued to. In this case it is a solicitor.
5. Click OK The **Account Details** window appears, displaying information for the solicitor.

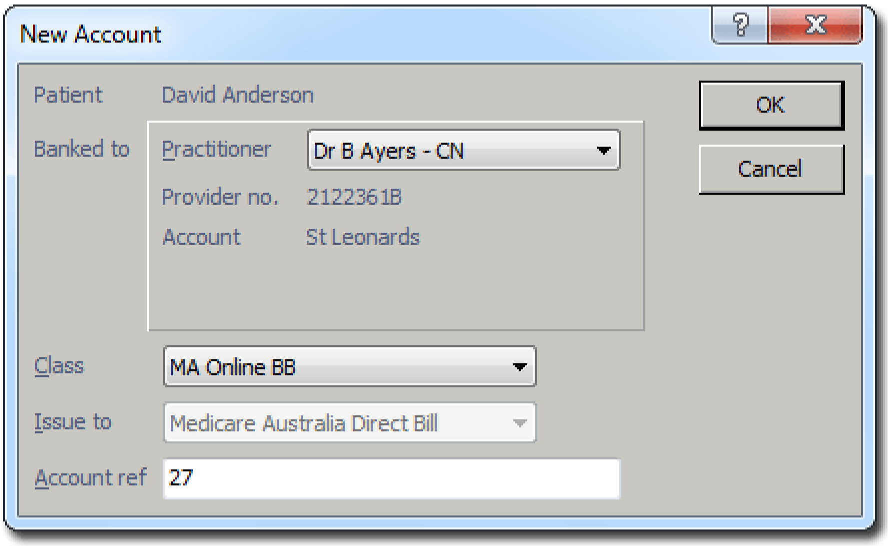


6. To enter the account's contacts, click the ... button, and select an Insurer from the drop down list. If the Insurer does not appear in the list, you can add them (see Adding New Contacts).
7. Enter other relevant information in the **Other Details** section. These fields will vary between account classes. In this case, enter the Claim Number and Injury Date.
8. Click OK You will be returned to the Accounts window.

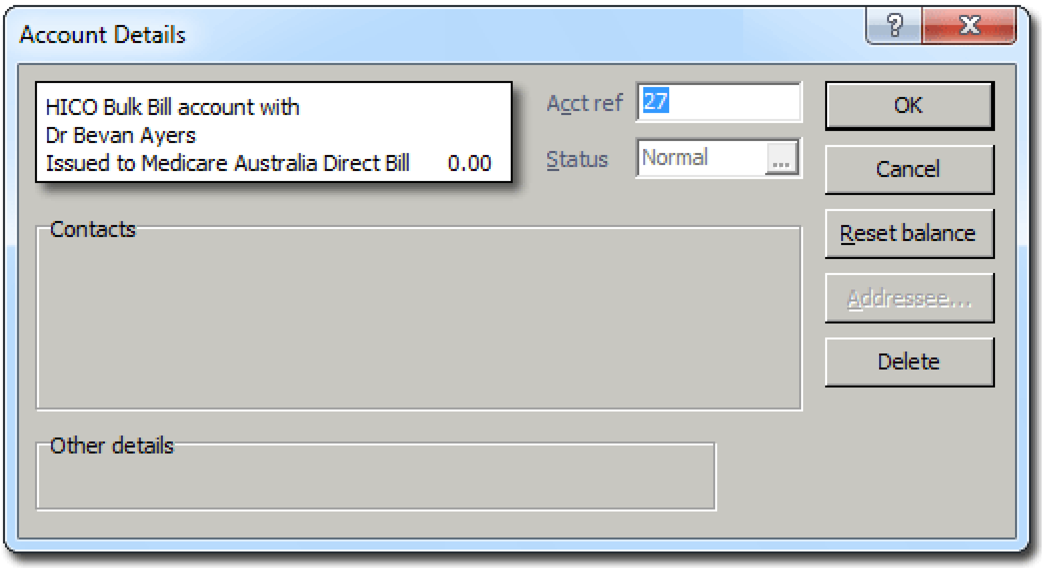
Creating a Medicare Bulk Bill/DVA Account

These accounts are very similar in their creation, with the only major difference being that DVA has differing levels. For instance, DVA Gold Card holders are fully-repatriated for their health care, whilst DVA White Card holders are only partially covered. With the latter, a Practice may elect to record the patient's Health Fund Membership details.

1. From the Patient Explorer select the **Accounts** menu item. The **Accounts** window appears (as shown above).
2. Click Create new account... The **New Account** window appears.



3. Select the **Practitioner** from the associated drop-down menu.
4. Select the **Class** of account (**MA Online BB, MA Online DVA, or MA Online PC**). As the claim will be electronically lodged, the **Issue to** field is automatically completed and inaccessible.
5. Click OK The **Account Details** window appears.



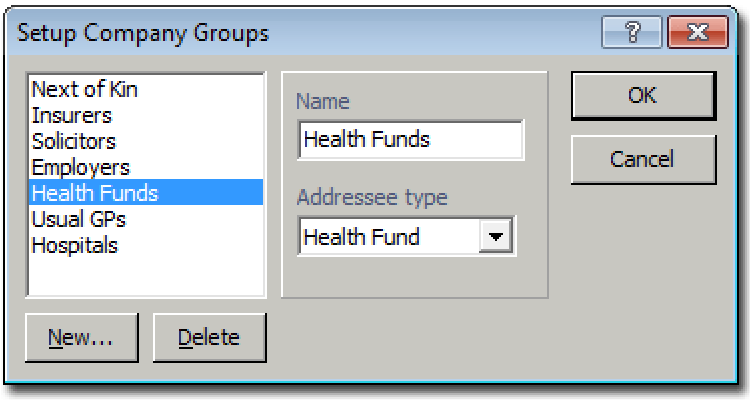
6. In most cases the account contacts will not be required or preset. Click OK to close this window.

MedicalDirector

Adding a New Health Fund

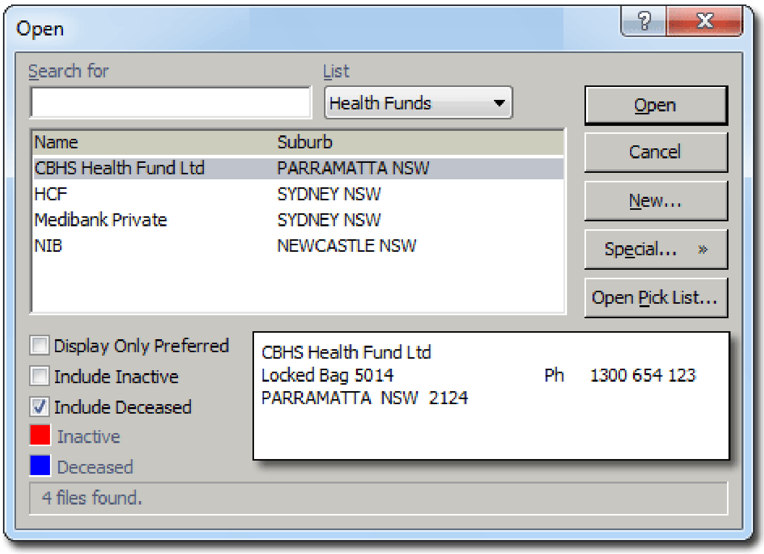
For convenience, ensure you have done the following first;

- Created a Fee List for your Health Fund.
- Setup MedicalDirector Blue Chip to associate Health Funds with an Address Type of 'Health Fund', as shown in the following image. This is done in the same way you configure Company Groups.

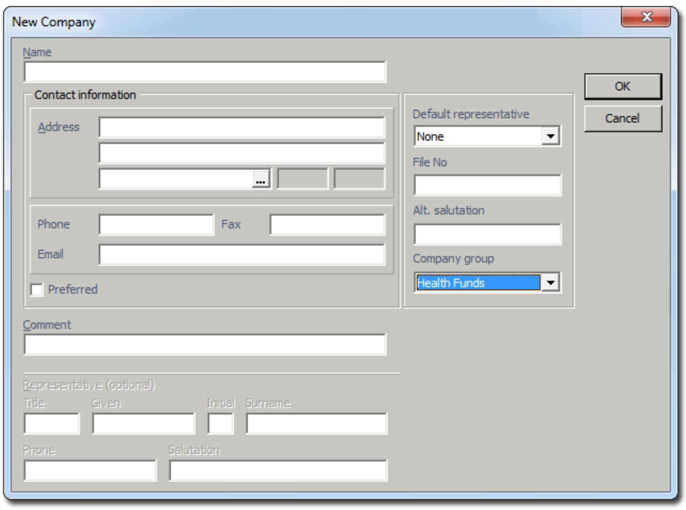


1. From the MedicalDirector Blue Chip main window, either:
   - Click the Open button,
   - Press Ctrl + O on your keyboard, or
   - Select File > Open.
2. The **Open** window appears.
3. From the **List** drop-down list, select **Health Funds**. From here you can search for and select an existing Health Fund record, and then view/edit the record by clicking the **Open** button.

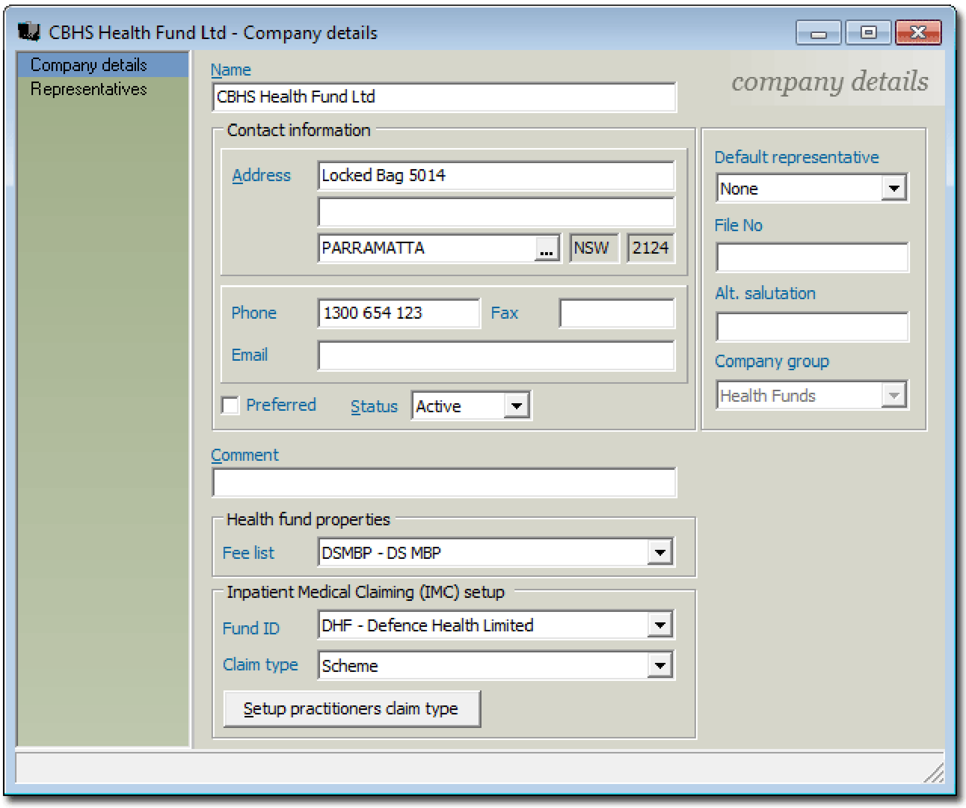
   To create a new record, continue to Step 5.



4. Click New... The **New Company** window appears. As a Health Fund is considered a subset of 'Companies', the same window for creating new Companies is used.



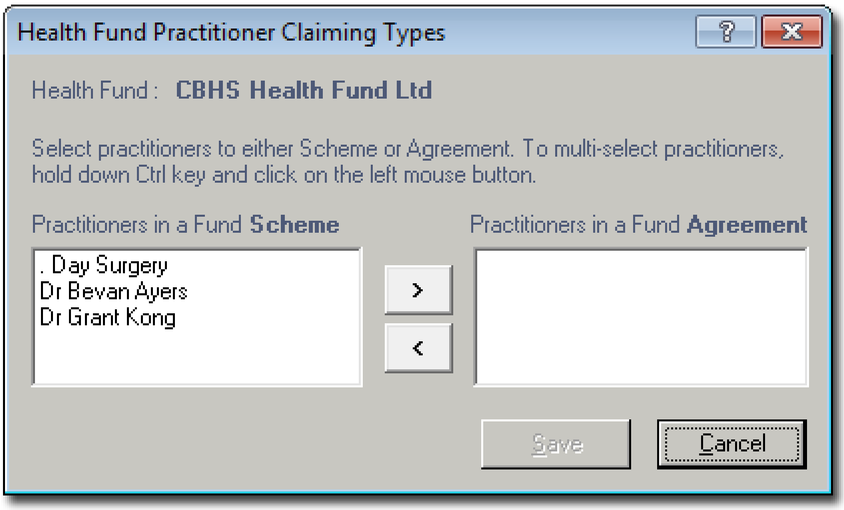
5. Enter details as appropriate, including selecting 'Health Funds' as the Company Group (selected by default), and the associated Fee List you created at Step 1, for the Health Fund.
6. Click OK to confirm. The new record is added to the list of Health Funds and you are presented with the Company Details window.



From here you can also manage the Health Fund's Representatives.

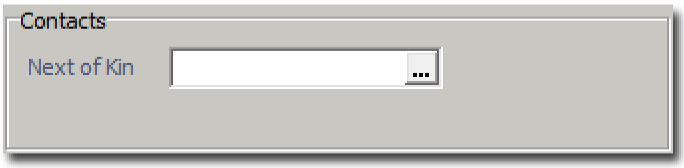
7. If you are using the Health Fund for Inpatient Medical Claiming then:
   a. Select the Fund ID (Insurer Code).
   b. Select the default Claim Type for the Health Fund (either 'Scheme' or 'Agreement').
   c. Click Setup practitioners claim type

      By default all your Practitioners will appear in the 'default' Health Fund Claim Type.
   d. Click on the < or > buttons to move your practitioners between 'Scheme' or 'Agreement'

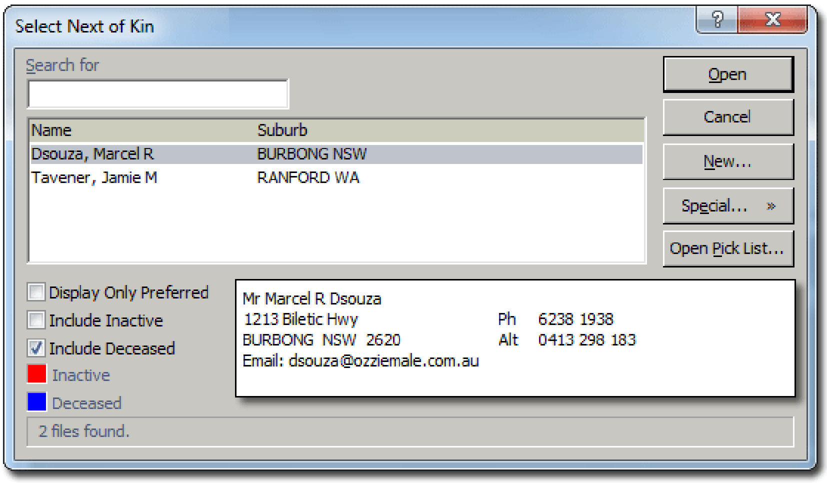


Parent's Database

The Parent's Database is used to hold details of people related (in some way) to an individual patient but are not necessarily patients themselves (for example, the child is the patient and the parent is responsible for the child's account). The database can also be used to hold emergency contact details. There are numerous ways to enter details into the patient database, but generally the procedure begins on the Accounts Detail window.



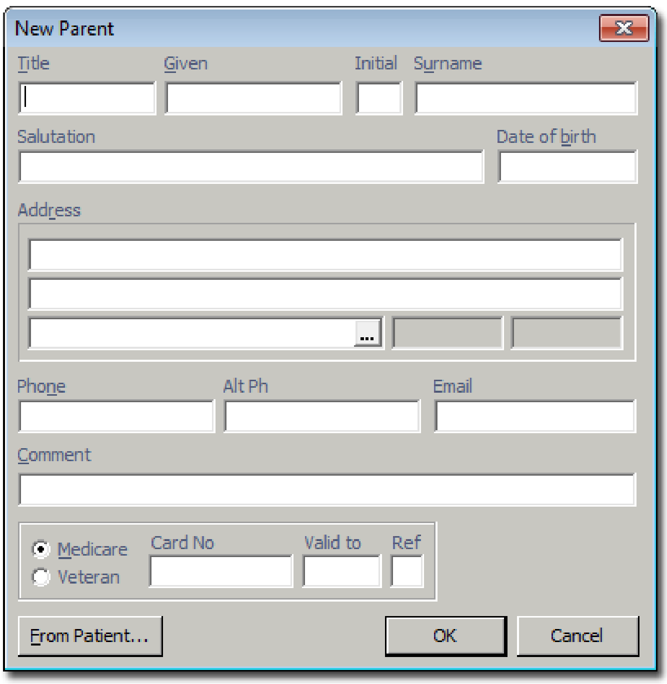
1. Within the Contacts section enter the contact's surname and press **Tab** or click the ... button. The **Select Next of Kin** window appears.
   - If the surname was typed, select the appropriate name from the list and click Open, or
   - If the ... button was pressed, type the surname in the **Search for** field, and then click Open to associate the name with the patient.
   - If the surname doesn't exist in either instance, see below for adding a new Next of Kin record.



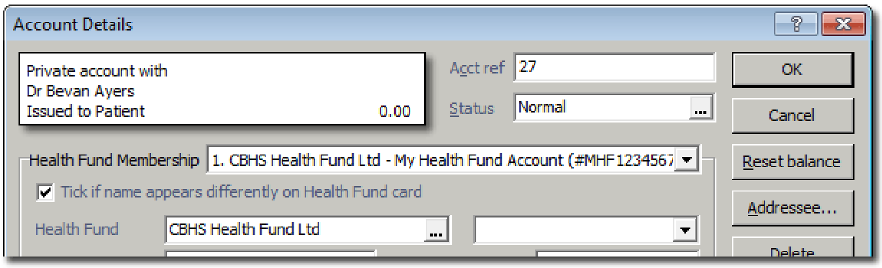
2. Click OK to return to the Account Details screen.
3. Click OK to return to the Patient Details screen.

Adding a New Next of Kin Record

1. On the Select Next of Kin window, click New...
2. Enter in the Parent's/Next of Kin's details as applicable. Clicking the **From Patient** opens the Patient Explorer. Type the patient's surname to associate them to the related patient (i.e. Medicare numbers, addresses, phone numbers and relationship). Remember these fields can be overtyped and the comment (relationship type) can be edited to include extra detail.
3. Click OK to confirm and save this record.



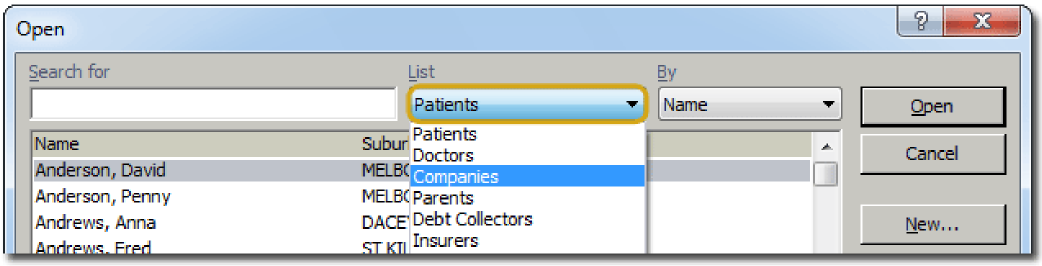
Changing the Addressee for the Account



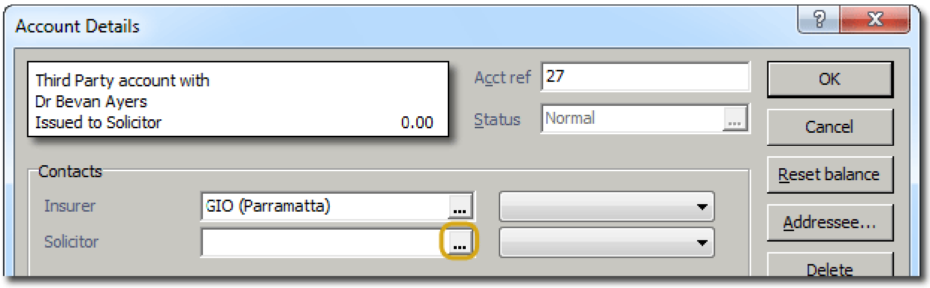
1. On the Account Details window, click Addressee... The **Change Account Addressee** window appears.
2. Select the account addressee to issue to via the associated drop-down list. Click OK to confirm your selection. This results in Invoices/Receipts being addressed to the person(s) selected.

Entering Account Contacts

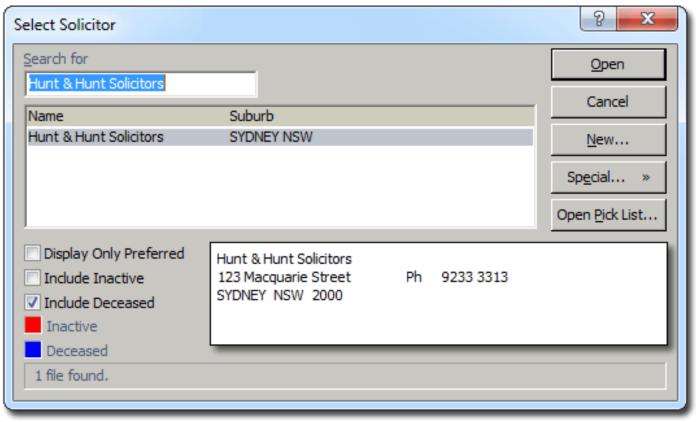
The following procedure is valid for entering new account contacts. Typically, account contacts are specified during the initial program configuration (performed by MedicalDirector). Contact data can be entered via the Patient Explorer by clicking the button to call the **Open** window, and then change the **List** from Patient to Solicitors or Companies.



Alternatively, via the Account Details window. click the ... button at the end of the contacts field.

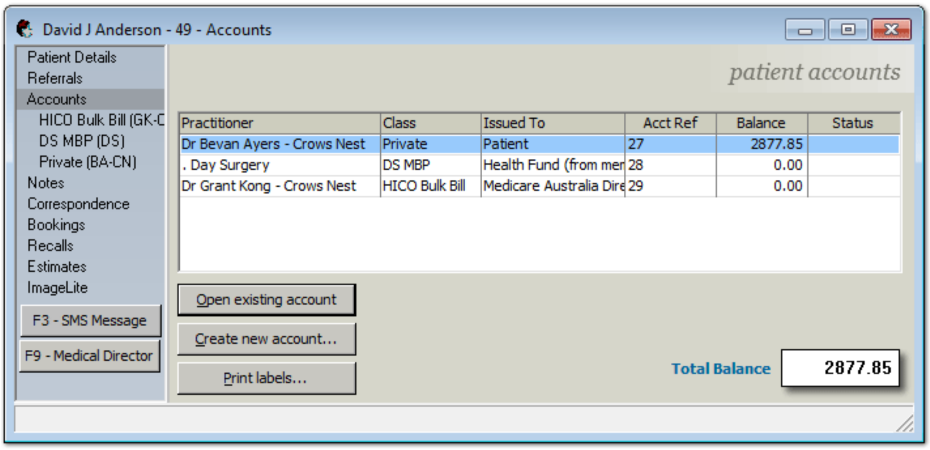


If the Account Contact does not appear in the Select Solicitor window, click New... to create a new record.

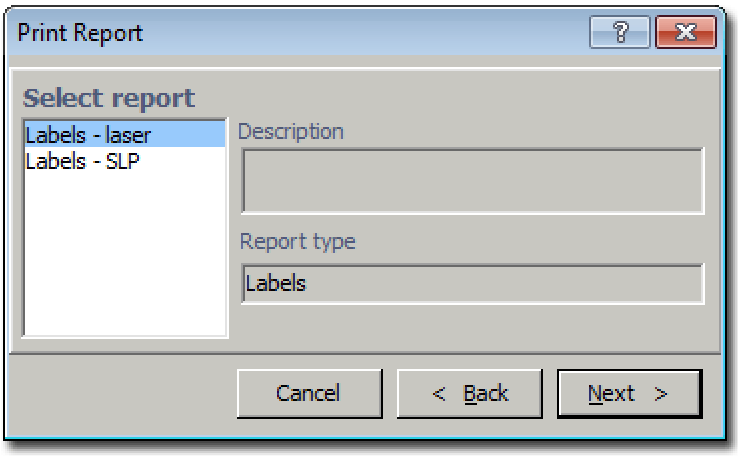


Printing Account Labels

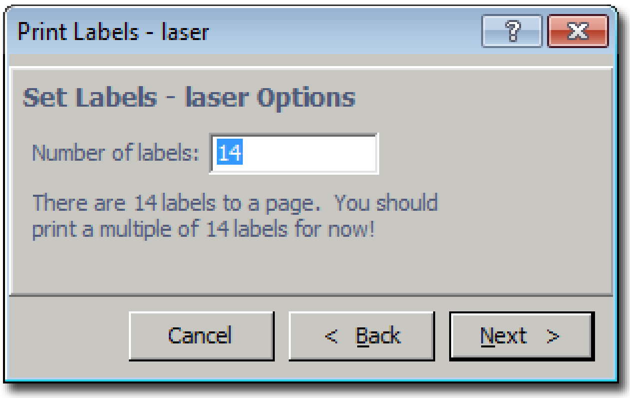
1. Open the record of the patient for whom you wish to print account labels.
2. From within the Patient Explorer, select **Accounts** from the margin menu.



3. Select the account you wish to print labels for and click Print labels... The **Print Report** window appears.



4. Select which type of labels you wish to print, and then click Next > The **Print Labels** window appears.

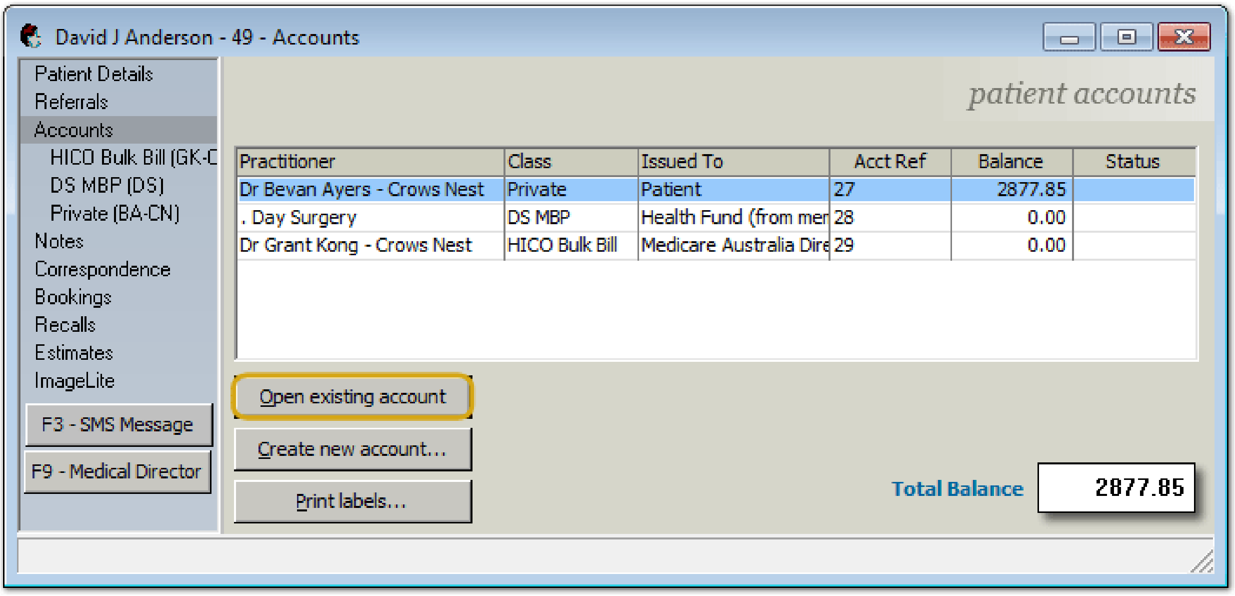


5. Enter the number of labels you wish to print, and then click Next >
6. Ensure that the correct printer and tray are selected and click Next > again.

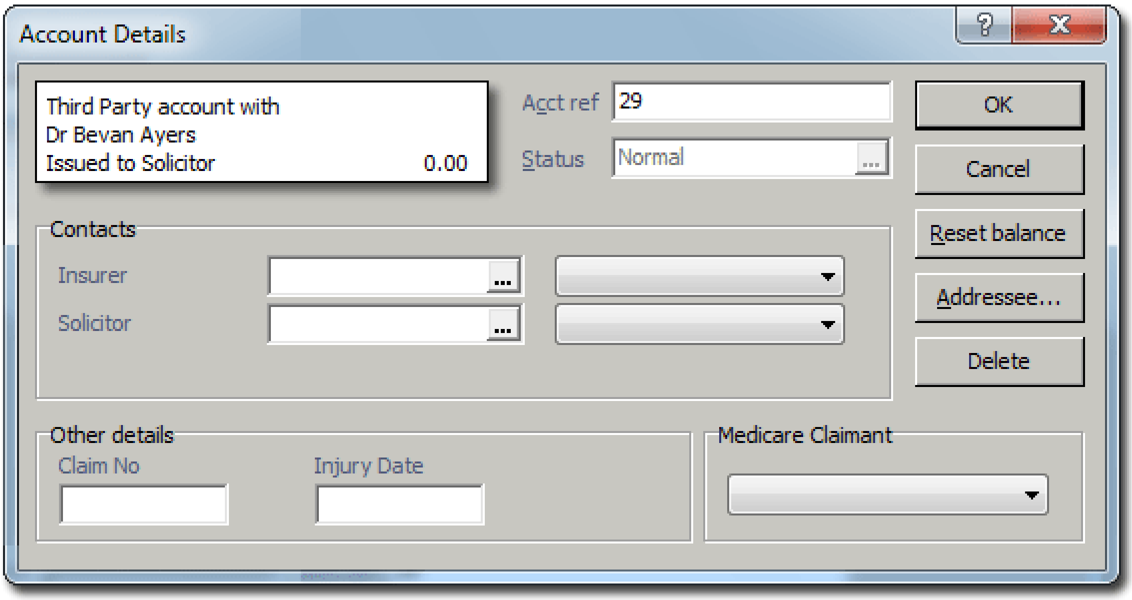
Deleting Accounts

If an account has been created in error (i.e. wrong practitioner, class or location), provided no transactions have been attributed to the class, it may be deleted.

1. Open the record of the patient for whom you wish to delete an account.
2. From within the Patient Explorer, select **Accounts** from the margin menu.
3. Locate and select the account, and then click Open existing account



4. Click Account Details The **Account Details** window appears.

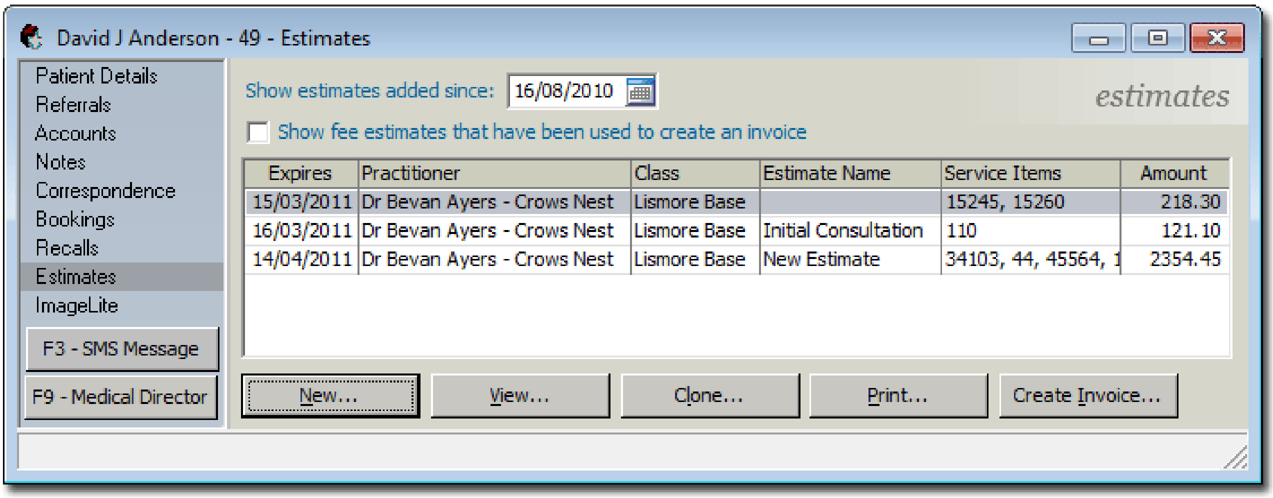


5. Click Delete This is only available when no transactions have been recorded in the account.

Estimates

MedicalDirector®

Estimates can be accessed via the associated margin menu within the Patient Explorer. Tip: Setup the account class for the invoice before setting up the estimate.



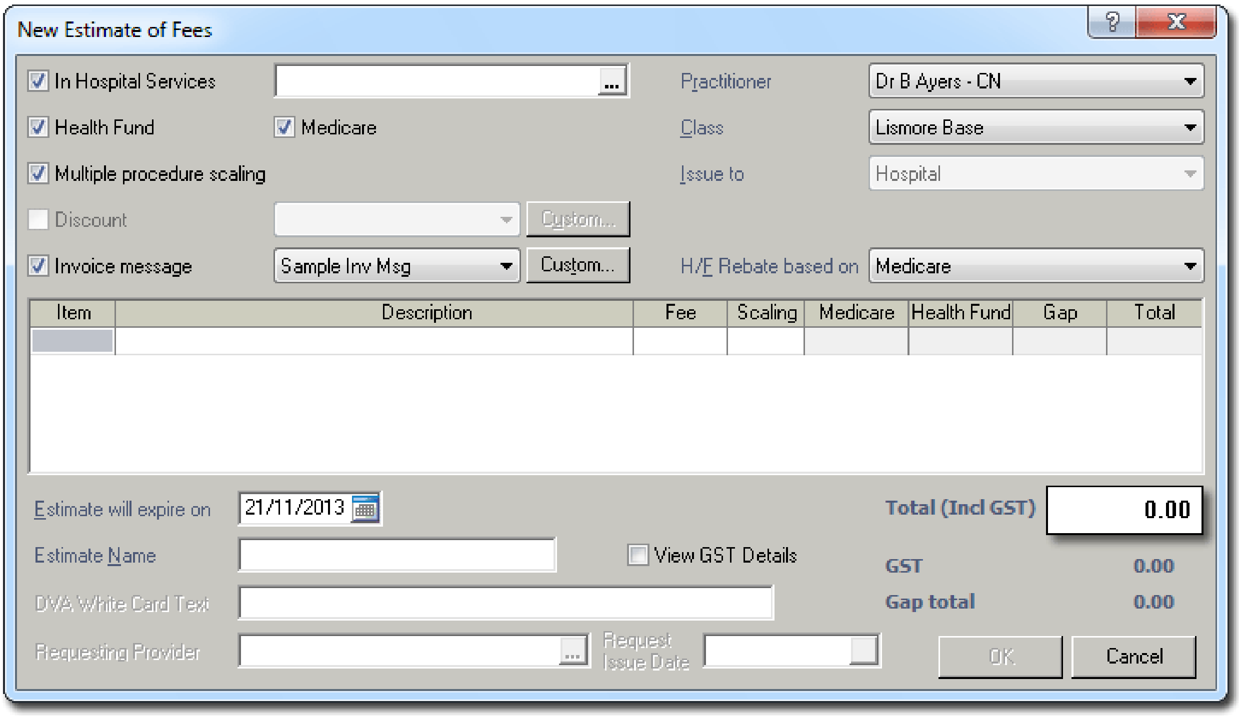
New...	To create an Estimate.
View...	To view the details of the selected Estimate.
Clone...	To copy the selected existing Estimate – useful for editing an existing Estimate like adding items, changing gap calculations (known to standard).
Print...	To print the Estimate.
Create Invoice...	Use the stored Estimate information, converting it into an invoice.

As with a traditional invoice, any details supplied automatically can be manually edited and additional items added if required. As the Practitioner and Class details have already been entered at the time of generating the Estimate, the invoice is automatically attributed to those details.

Create an Estimate for a Private Patient

Completing an estimate is similar to completing an Invoice for a patient.

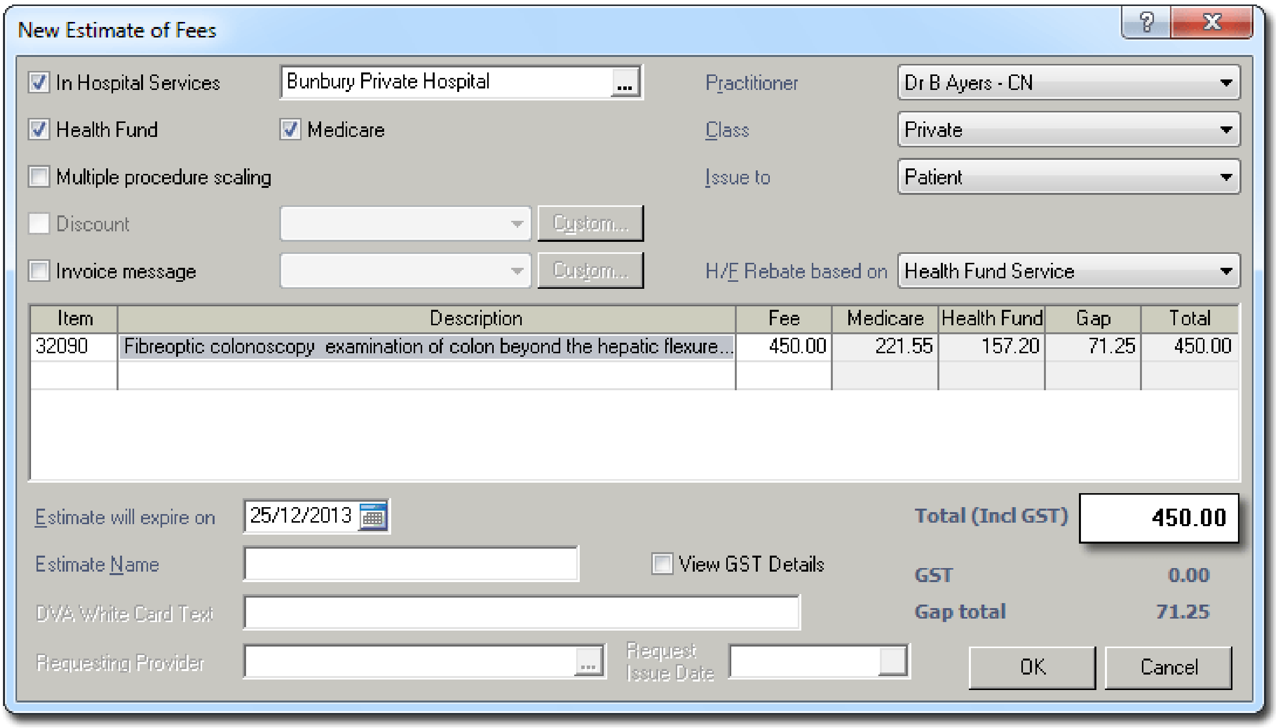
1. Within the Estimates screen, click New... The **New Estimate of Fees** window appears



2. Nominate the Hospital where the operation will take place, by either typing the hospital name and pressing **Tab**, or clicking the ... button and selecting the hospital from a list.
3. Check the Practitioner and Account class details are correct.
4. Type in the Service Item Number and press the **TAB** key. Details will be automatically applied to the corresponding columns. As with invoices, the fee can be manually replaced, but the rebate and gap amounts cannot. Repeat this process for the remaining Service Item(s) you wish to add.]
5. Name the estimate for your reference, and give it an expiry date if desired. Click OK to complete the estimate. This will then appear in the patient's record.

Create an Estimate for a Private Patient (known gap)

This is applicable where the patient pays the gap between a doctor's fees, less (Medicare rebate @ 75% + health fund's published rate).



1. Set up the estimate as outlined above for a Private Patient.
2. Ensure you tick the **Health Fund** check box to display the Heath Fund column.
3. Via the H/F Rebate drop-down list, select the required Health Fund's price list.

Disclaimer: refer to contractual arrangements with your health fund, as circumstances vary from practice to practice.

Create an Estimate for a Private Patient (standard gap)

This is applicable where the patient pays the gap between a doctor's fees, less (Medicare rebate @ 75% + health fund rebate @ 25% of the MBS rate).

1. Set up the estimate as outlined previously.
2. Ensure you tick the **Health Fund** check box to display the Heath Fund column.
3. Via the H/F Rebate drop-down list, select the Medicare rebate.

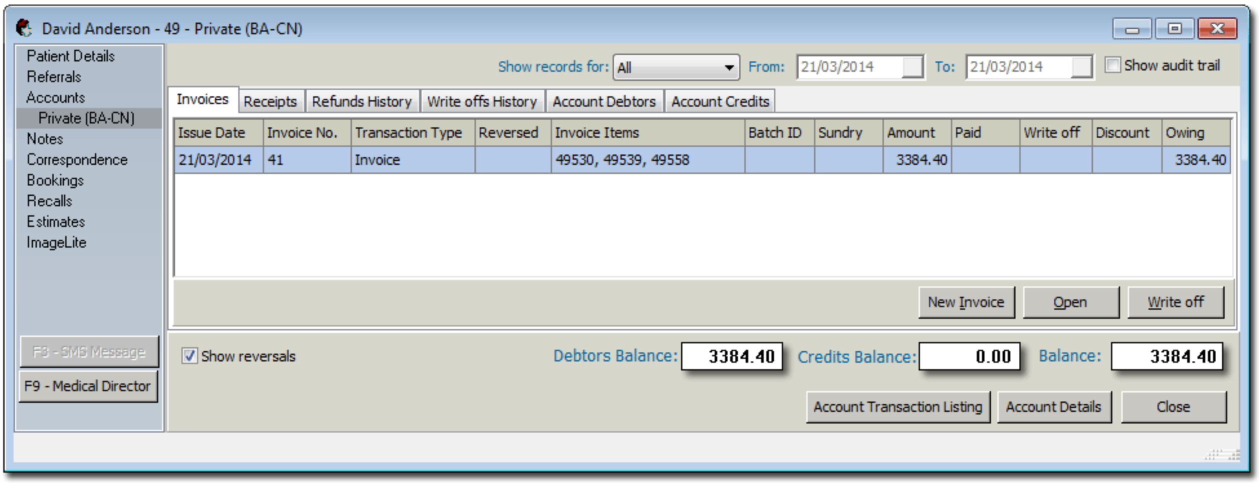
Invoicing

There are two main types of invoices covered in this section, with the most common being the Invoice/Receipt combination (where the patient pays for the consultation at the conclusion of the appointment). The second is the Standalone Invoice (where the patient pays for the consultation later, or a third party is being invoiced and will pay at a later date).

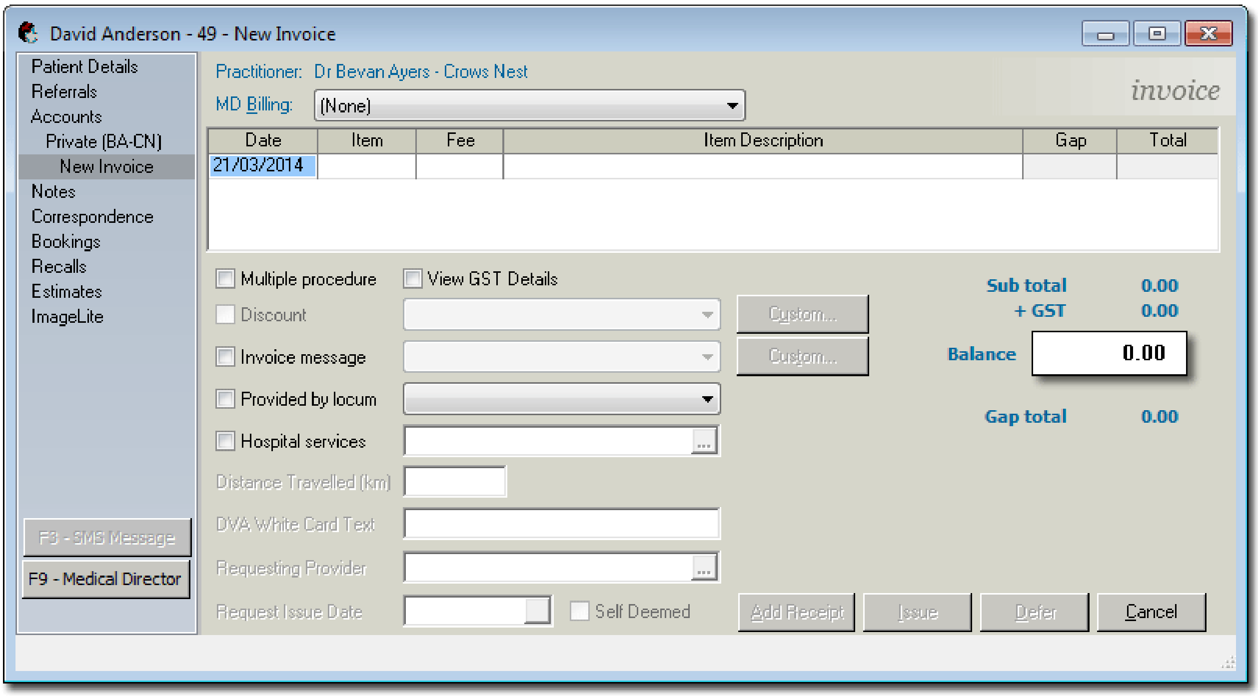
Combined Invoice/Receipt

This section assumes an account has been created. To create a new account, refer to the Creating Accounts section.

1. Open the account you wish to invoice to and select the **Invoices** tab, as shown in the following image.



2. Click New Invoice A new invoice is generated for you.



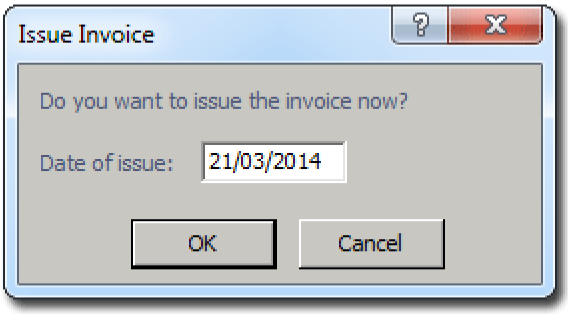
3. Press **Tab** to accept the current date (Service Date) and move to the next field, or manually change the date of service and then press **Tab**.

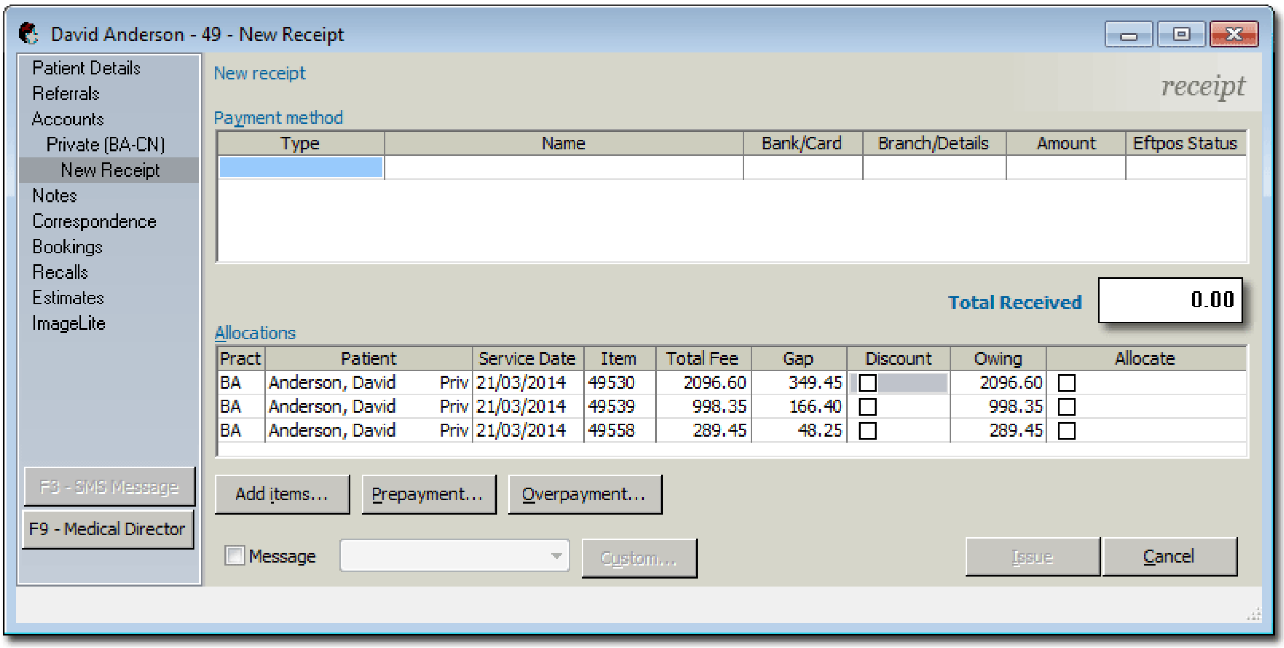
4. Enter a Service Item Number and then press **Tab**. The Item Description will be populated automatically, but can be edited. Press the **Tab** key.

5. Although the fee will automatically populate, this can still be replaced if required

6. Click Add Receipt You may be prompted to select a referral. This is optional. The Issue Invoice window appears.

7. You will be prompted to issue the invoice with an Issue Date. Click OK to accept. Tip: Date of Issue can be different to Service Date (e.g. invoicing operation billing for previous dates). You will be shown the Receipting Module where a new receipt will be generated for you, ready for your input.





8. Double-click the **Type** field within the **Payment Method** section, and then select from a list of available payment types, or simply start typing the name of the payment type.

   Payment options are self-explanatory. However 'Credit Card' refers to the mercantile system involving credit card slips. 'EFTPOS' covers both EFTPOS Auto and EFTPOS Manual using Visa/Master Cards and Debit Cards (referred to as Other). Debit/Visa/Master Cards are recorded as EFTPOS Manual type transactions. If Tyro EFTPOS is installed, the option EFTPOS Auto should be chosen.

   a. Enter the payment type and the name of payer. If paying by card choose from Visa, MasterCard or Other (savings or debit cards).

9. Enter the Branch/Details (if required). Press the **Tab** key.

10. It is recommended for audit trails that cheque branch or cheque numbers are recorded. TIP: Anything typed in here will be printed on the invoice. Therefore, please do not record Credit Card Details as this may lead to fraudulent activities.

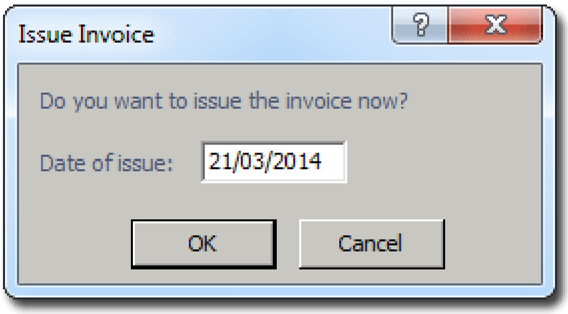
11. Enter the required amount and press the **Tab** key.

12. To determine which service items will have payment allocated them, locate the invoice item within the **Allocations** section and tick its associated **Allocate** check box.

If a TYRO transaction is declined, MedicalDirector Blue Chip will not complete the receipt. You will be returned to the New Receipt window. The first line of the receipt will still display the original information except for the amount (which will be $0). This line cannot be edited. On the second line of the receipt, try receipting using an alternative payment method. If the patient does not want the decline information appearing on the receipt, the receipt must be abandoned and a new one started.

13. Click 

You may be prompted to select a referral. This is optional. The **Issue Invoice** window appears.

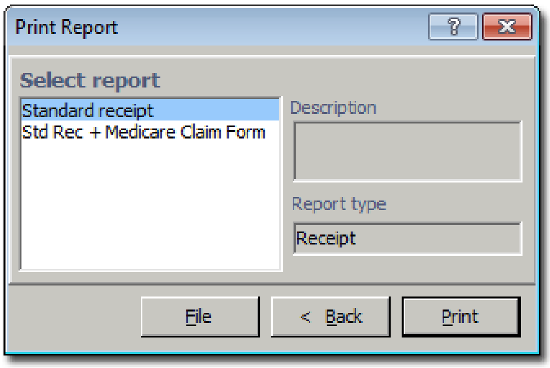


14. Click 

The **Print Report** window appears, pre-selected with receipt options.

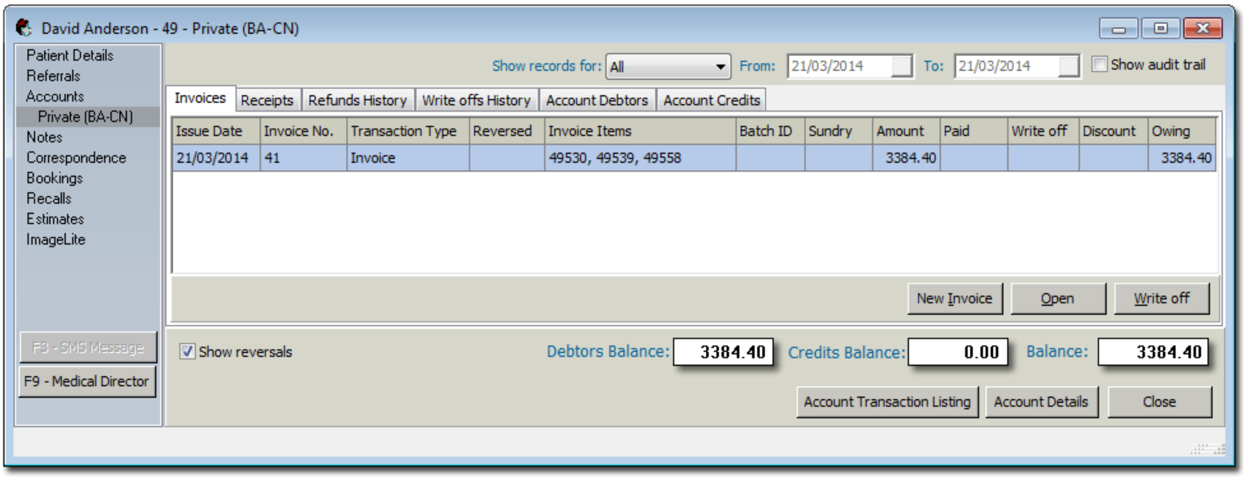
15. Click 

After printing the receipt, the **Invoice** tab will display the invoice's Service Item Number(s) and the amount paid. The **Receipt** tab will show the amount paid, its allocation and the payment method.



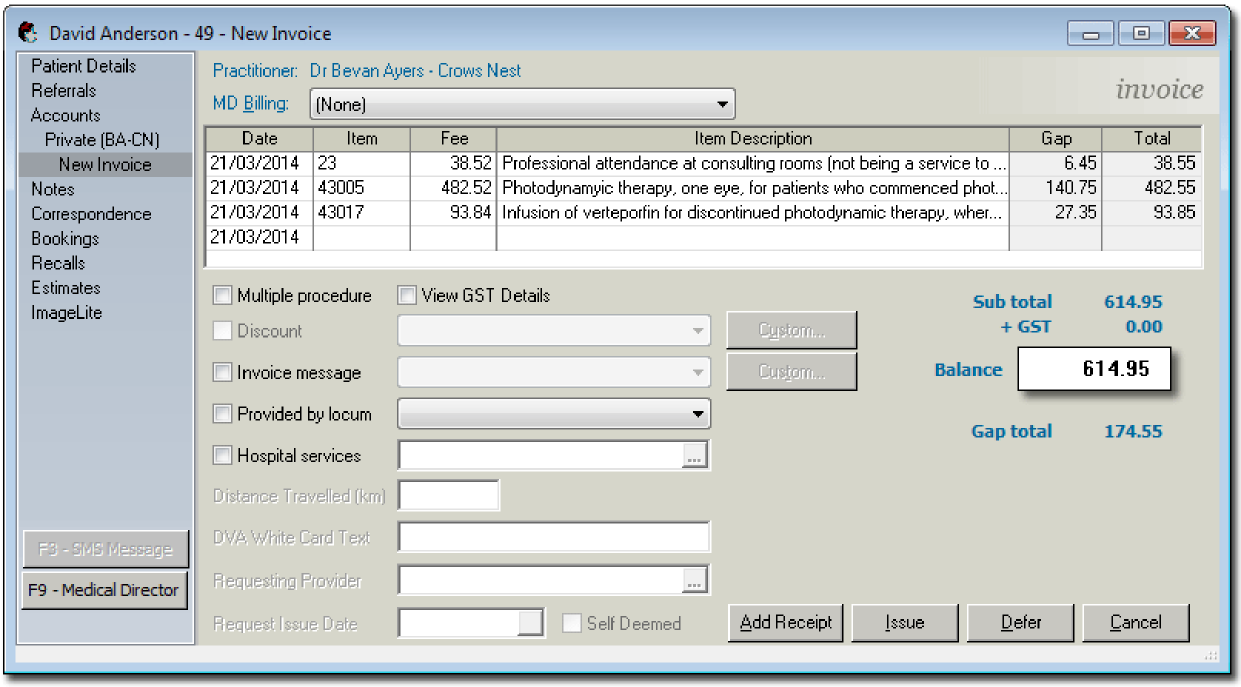
Standalone Invoice

1. Open the account you wish to invoice to and select the **Invoice** tab, as shown in the following image.

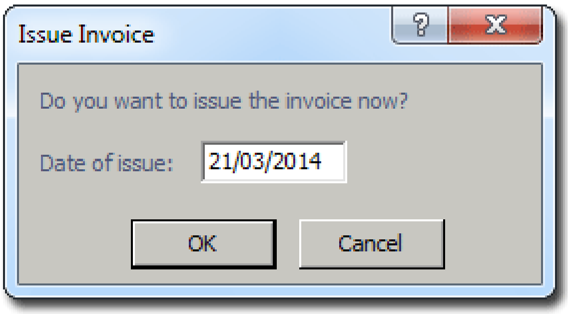


2. Click 

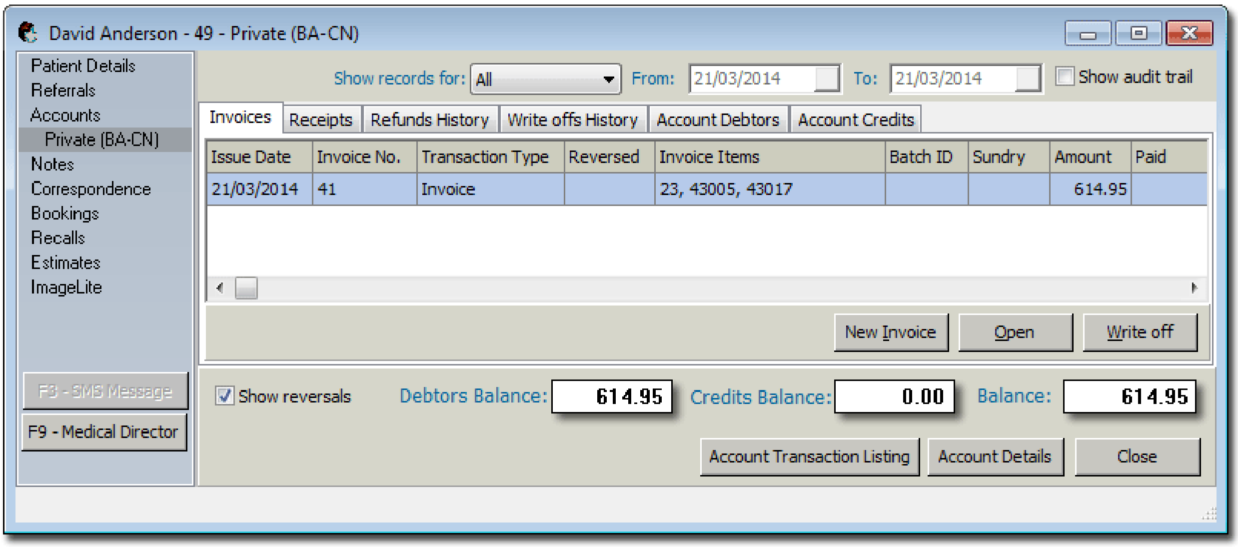
A new invoice is generated for you, ready for your input.
3. Press the **Tab** key to accept the current date and move to the next field, or type the date of service and press **Tab**.
4. Enter the required Service Item Number and press the **Tab** key. The associated information for the Service Item will be completed automatically, but can be edited. Although the fee is automatically added, this can be replaced. Repeat this process for other Service Items you may wish to record.



5. Click Issue You may be prompted to select a referral. This is optional. The **Issue Invoice** window appears.



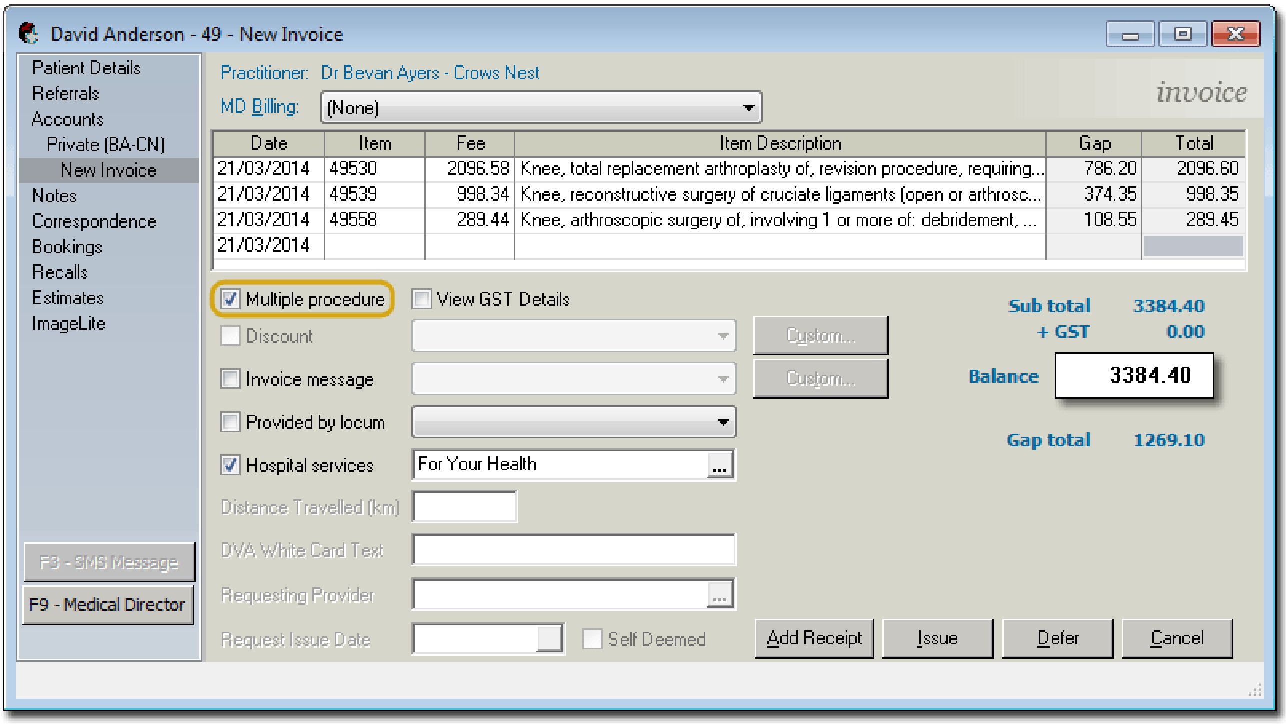
6. Click OK The **Print Report** window appears.
7. Click Print You will be prompted to select a printer destination and settings.
8. Click Print to print your invoice. You will be returned to the Invoices tab where the new invoice appears. Notice that no payment has been made against it (the **Paid** column is blank).



Multiple Procedures – In Rooms (outpatient)

1. Create an invoice as shown previously.

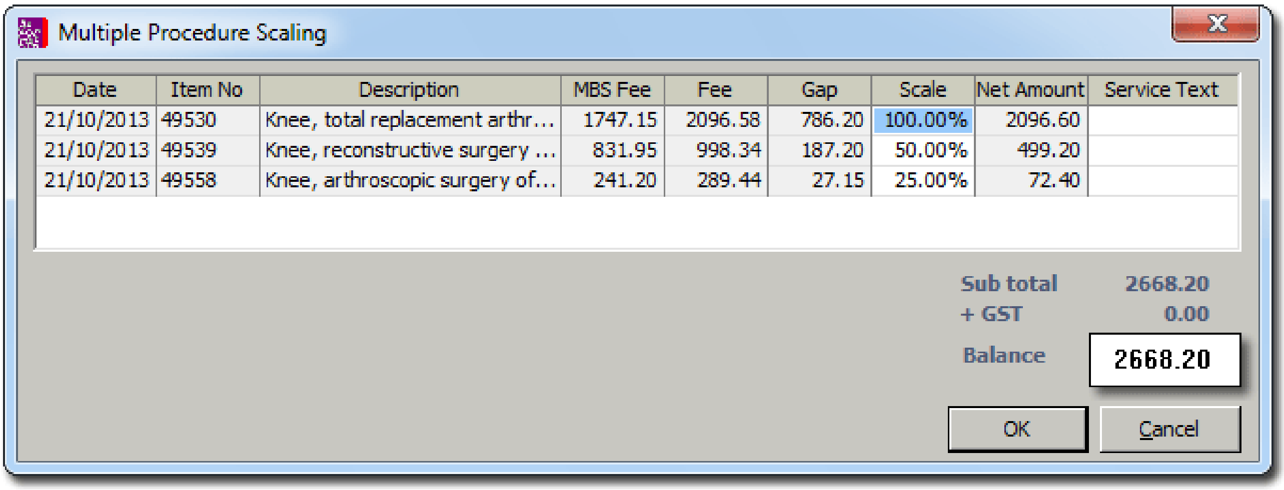
MedicalDirector



2. Tick the **Multiple Procedure** check box (as shown above). This enables scaling to be applied when billing multiple surgical items. This scaling can be adjusted. It is the Practice’s responsibility to ensure the correct item number(s) are scaled.

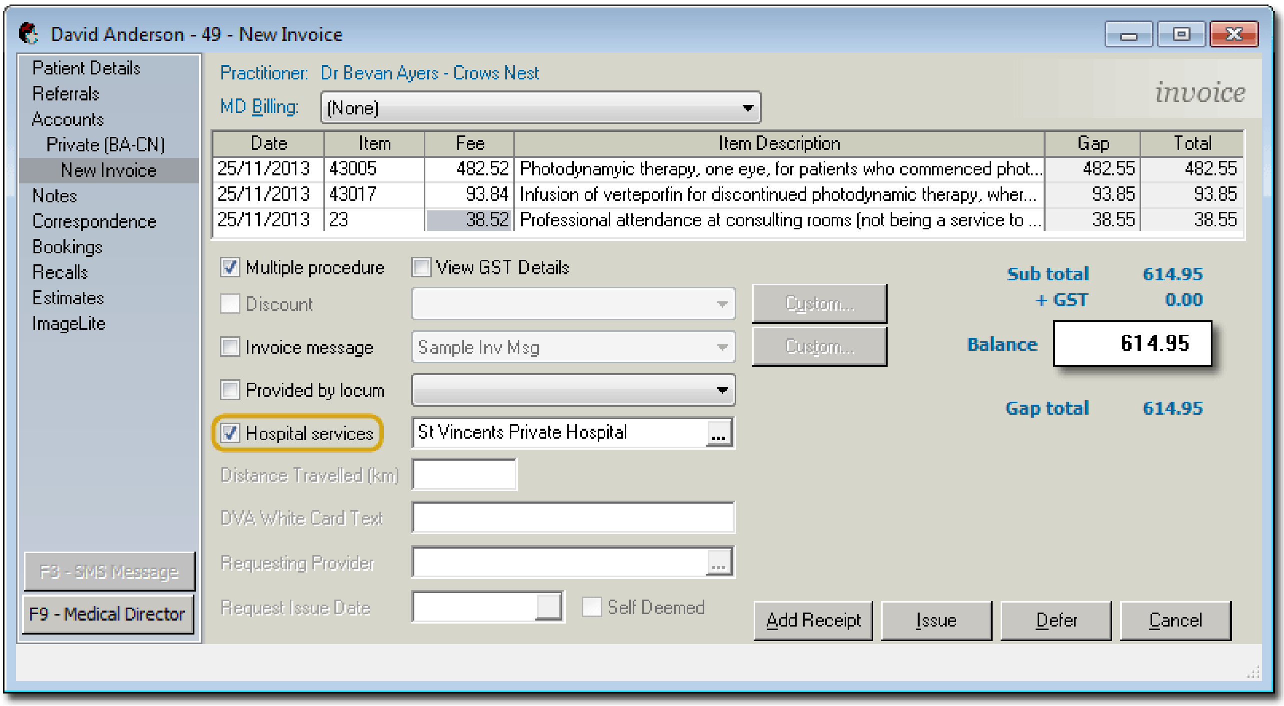
   Enter in the item numbers in any order and MedicalDirector Blue Chip will re-order them based on Medicare Operation Ruling when the invoice is issued (providing they are based upon the Medicare item list). If item numbers are consultation-based then the fee value will only be added.

   Select **Issue** or **Add Receipt** depending on circumstances and the following screen will appear, displaying the scaling calculations.



3. Click OK to continue. Issue the invoice as prompted, or complete the receipt as described previously.

Hospital Services - Inpatient



The **Hospital Services** check box (located at the bottom of the example image) indicates that the services provided are performed in a hospital. The rebate amount will reflect 75% of the schedule rate as required. If Health Fund classes are used, then the gap amount can change to reflect 100% as different pricing rates may be used.

TIP: Tick the **Hospital Services** check box *before* adding any Service Item numbers.

1. Tick the **Hospital Services** check box.
2. Type in **Hospital** name or select one via the ... button, to indicate where the services were performed. If the hospital doesn't exist in MedicalDirector Blue Chip you will be prompted to create a new entry for it.
3. Enter a service date (this may need to be backdated to the date of the surgery).
4. Complete the invoice as normal.

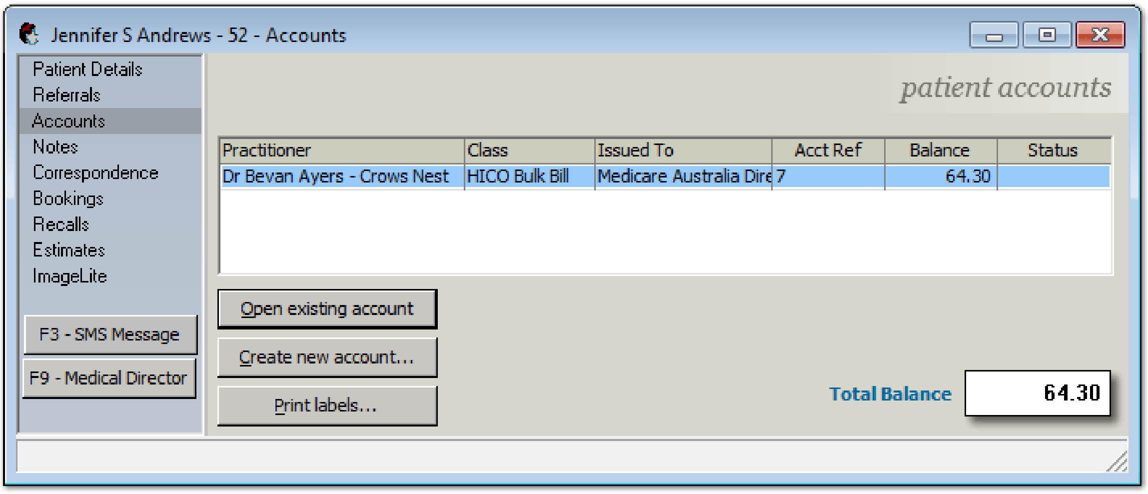
When the Invoice is printed, an * will appear after the item indicating it was an inpatient procedure listing the Hospitals' name on the invoice.

Receipts

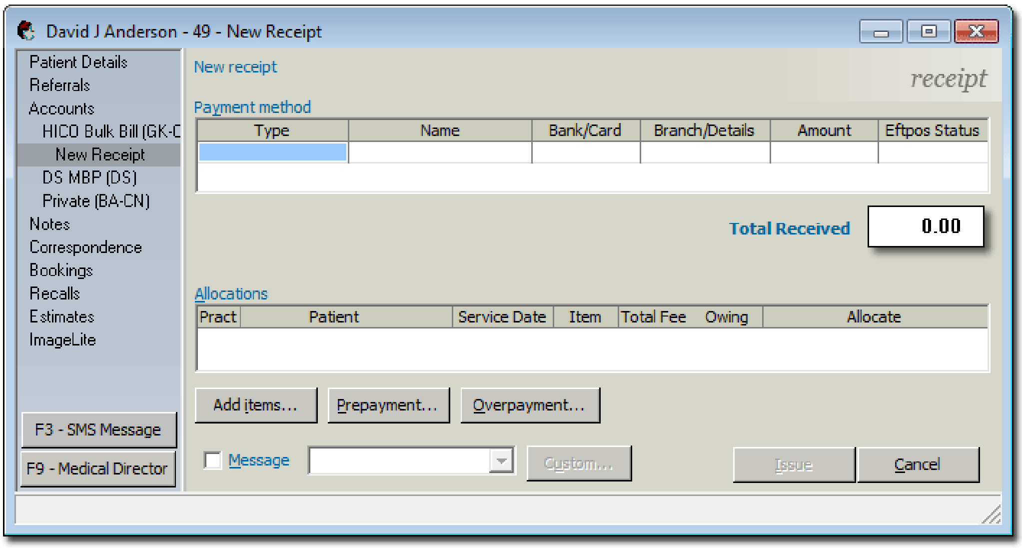
Receipting a Pre-Existing Invoice

The following section covers invoices that have already been issued and are listed in the patient's account. In this scenario, the receipt will be created from within the Patient Explorer.

1. Select **Accounts** from the margin menu.

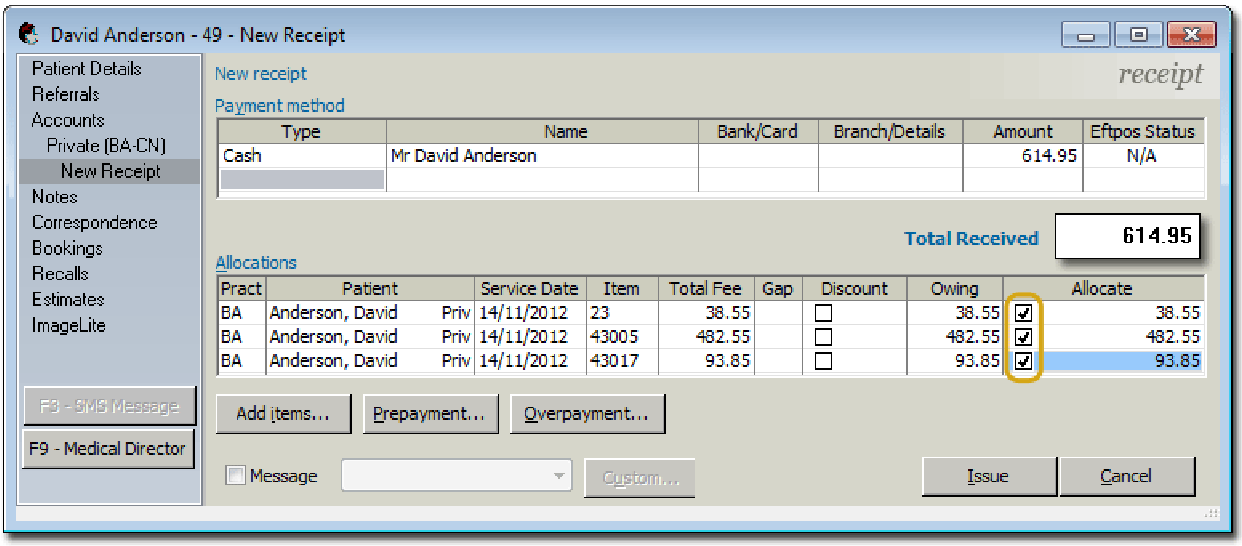


2. Select the account you wish to issue a receipt for.
3. Click the **Open Existing Account** button.
4. Within the open account, select the **Receipts** tab.
5. Click New Receipt



TIP: for explanations of the various payment types, please refer to the Combine Invoice/Receipt process.

6. Double-click within the **Type** field to display a drop-down menu of acceptable payment types, or simply type the payment type.
7. Press the **Tab** key. Enter the name of the payer. *If paying by cash, the name is automatically inserted.*
8. Press the **Tab** key. In the **Bank/Card** field, select from Visa, MasterCard or Other.
9. Press the **Tab** key. Enter the **Branch/Details** (if required).
10. Press the **Tab** key. Enter the required amount.
11. Press the **Tab** key. Indicate which Service Item(s) will be allocated payment, by ticking its associated **Allocate** check box, as shown in the following example.



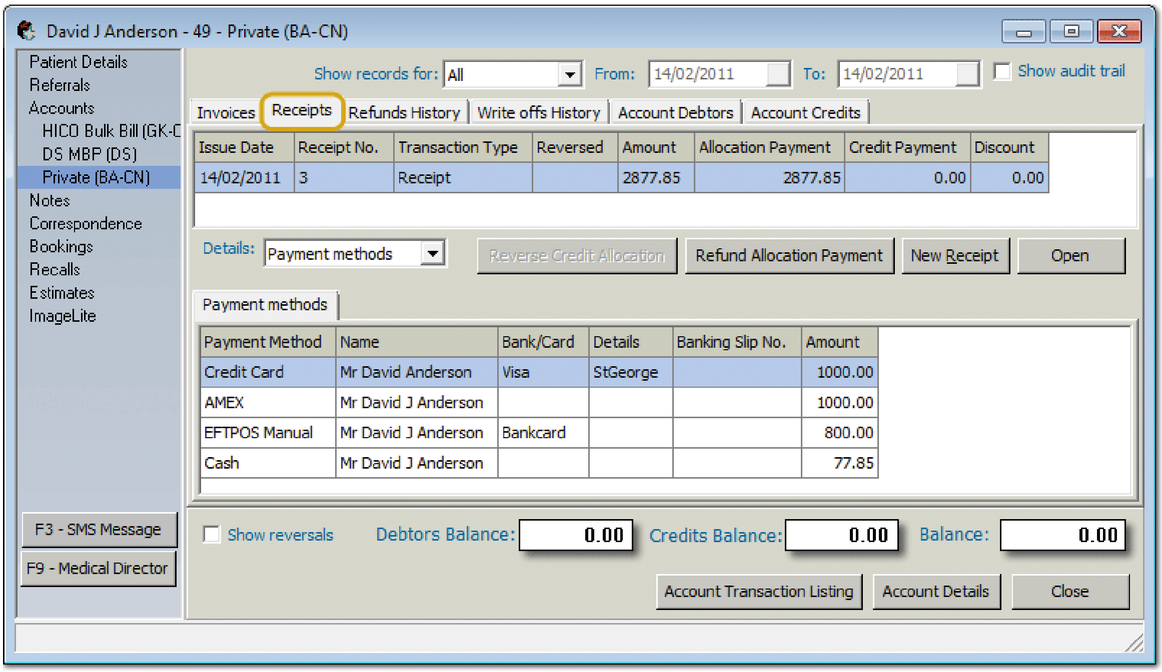
12. Click Issue to issue the receipt, and then follow the remaining standard procedure for printing a receipt.

Receipting Multiple Patients

MedicalDirector Blue Chip allows you to receipt multiple patient invoices with one payment.

It is not recommended that split receipts be performed for invoices that require claiming from Medicare. This method is widely used when receipting third party statement payments i.e. the payment (direct debit, cheque) pays multiple patients, and a receipt is not required to be given to the patient.

1. Open the first patient's record, and select their **Accounts** window.
2. Select an account and click Open existing account You are presented with the details of the account. Select the **Receipts** tab, as shown below.



3. Click New Receipt The **New Receipt** window appears.

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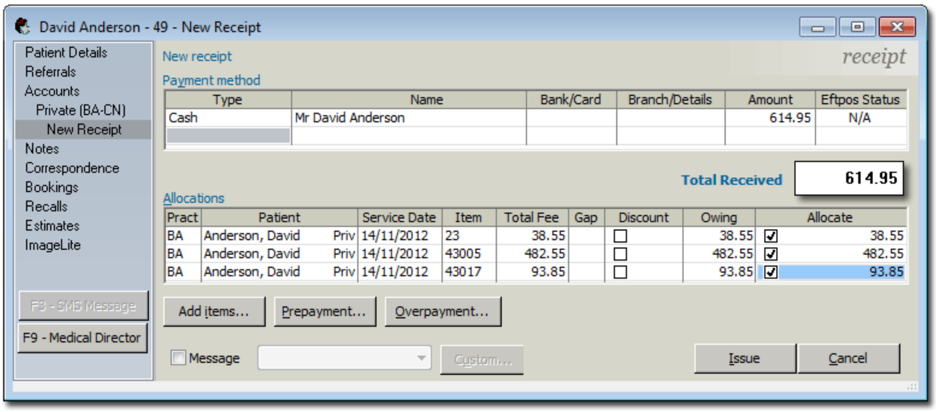
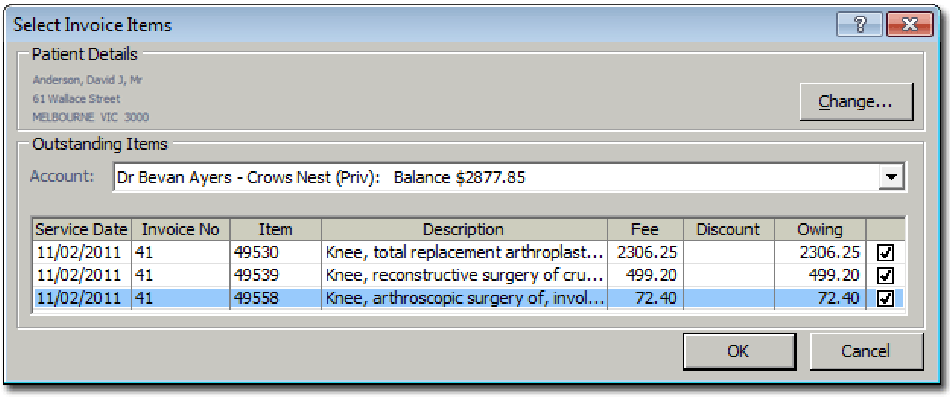
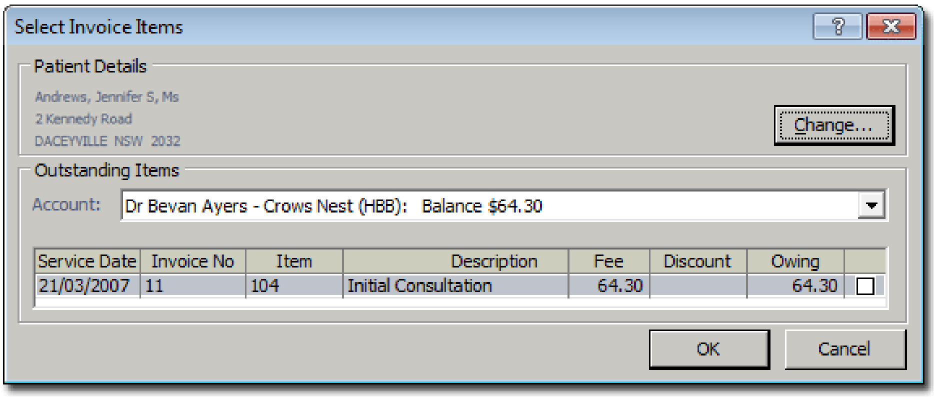


4. Enter a payment as in the standard fashion.

5. To find outstanding items for the remaining patients, click Add items... The **Select Invoice Items** window appears.



6. Click Change... to search for and open the next patient's record. The **Select Invoice** Items window will now display the newly-selected patient's name, along with their outstanding invoice items.



7. Select the items that you wish to allocate payment to by ticking the related check boxes at the far right of this window, and then click OK to confirm your selections.

8. Continue adding items using the instructions from Steps 5-8 (above) until you have allocated the receipt to all of the patients you need to. You will know that the receipt is balanced and ready to issue, when the Issue button becomes available.

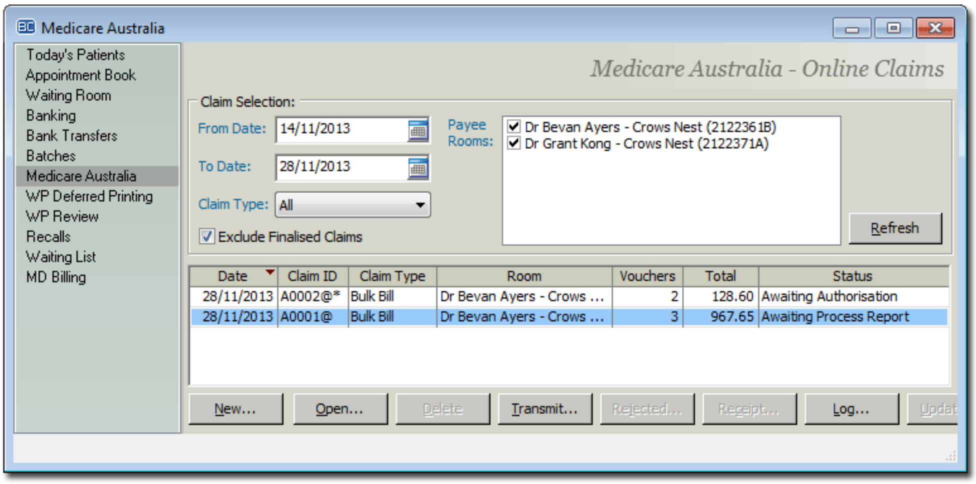
9. Issue the receipt and print or file it. The Receipt screen for each patient shows that payment has been received for each outstanding amount, with the same receipt number.

Manual Receipting of Online Claims

You may find it necessary to manually-receipt an online claim. This can occur if for example;

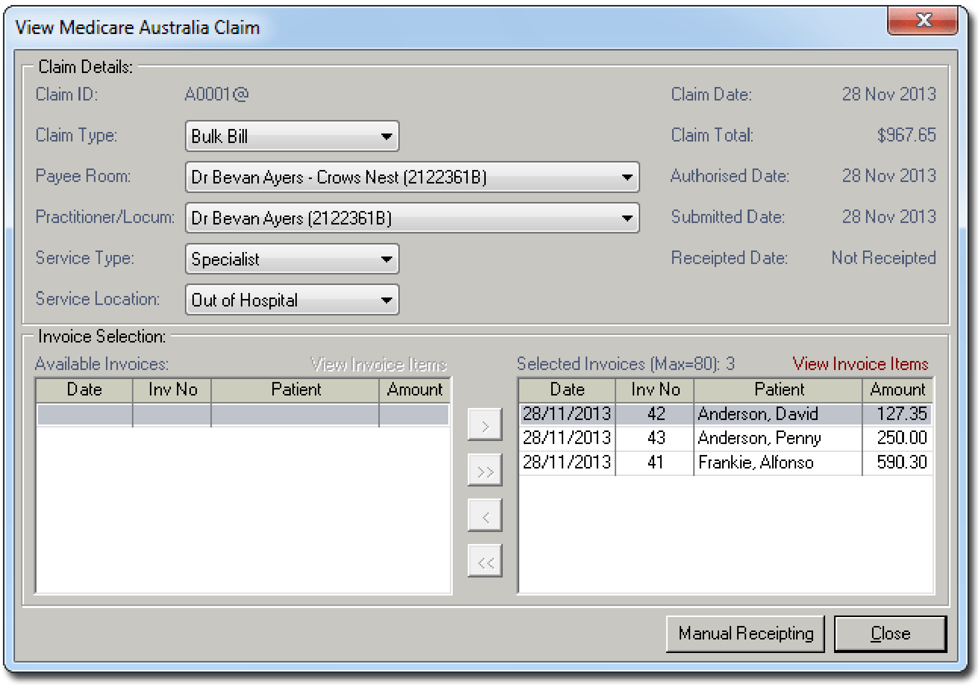
- The claim processing gets delayed at Medicare's end, with no processing details returned to MedicalDirector Blue Chip.
- Medicare pays the claim, and payment is made to your bank account, but the processing details are not retrieved by MedicalDirector Blue Chip.

1. Conduct an online claim, as normal. After you have submitted the claim you will be returned to the Medicare Australia window.



2. To begin manually-receipting a claim, locate the claim you wish to receipt, and either;
   - Double-click the claim.
   - Select the claim, and click Open...

   The **View Medicare Australia Claim** window appears.



3. Click Manual Receipting

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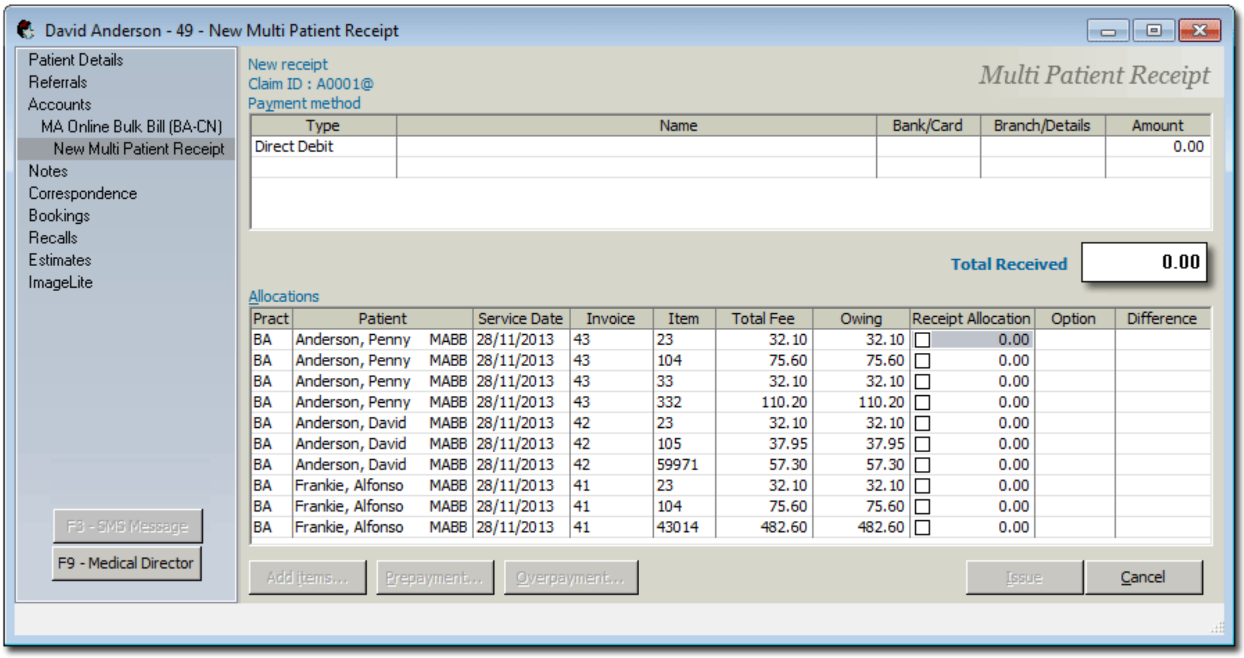
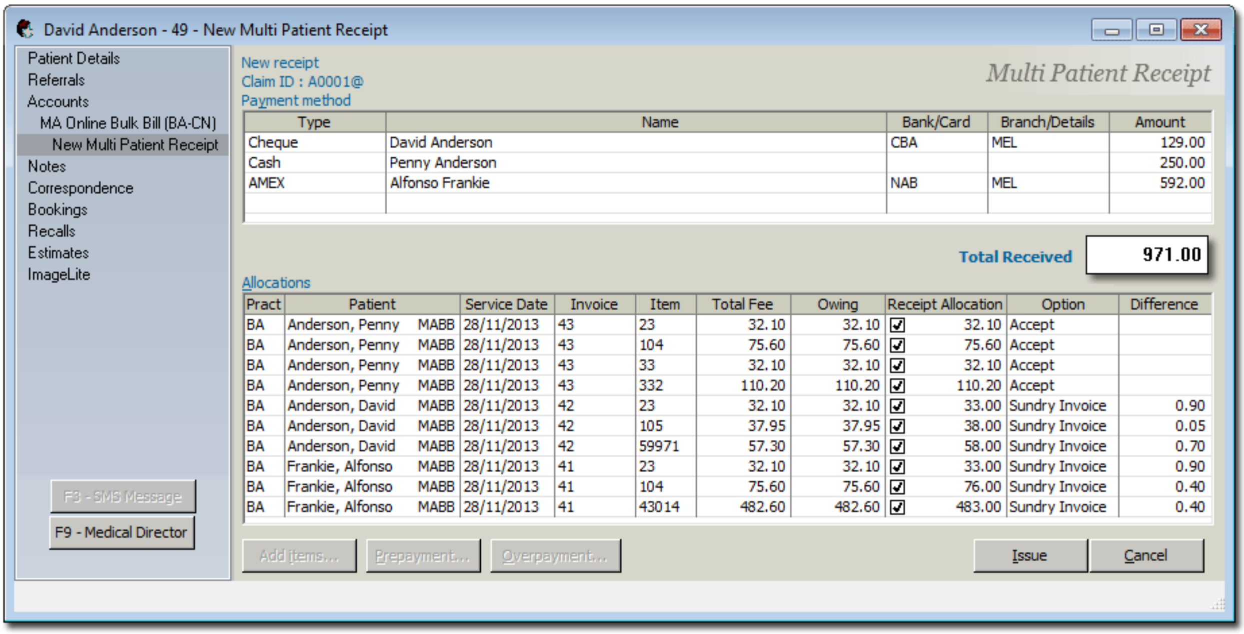
4. You will be prompted to confirm that you wish to manually-receipt the claim, after which the **New Multi Patient Receipt** window appears.

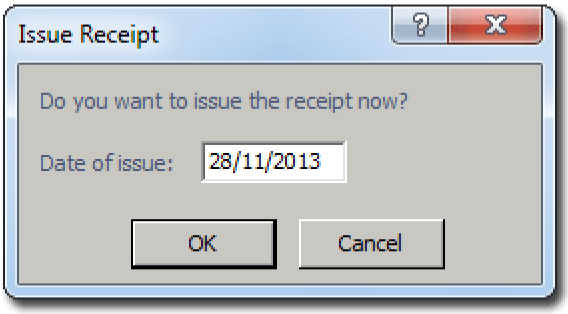


5. Complete the payment details as you would a normal receipt.



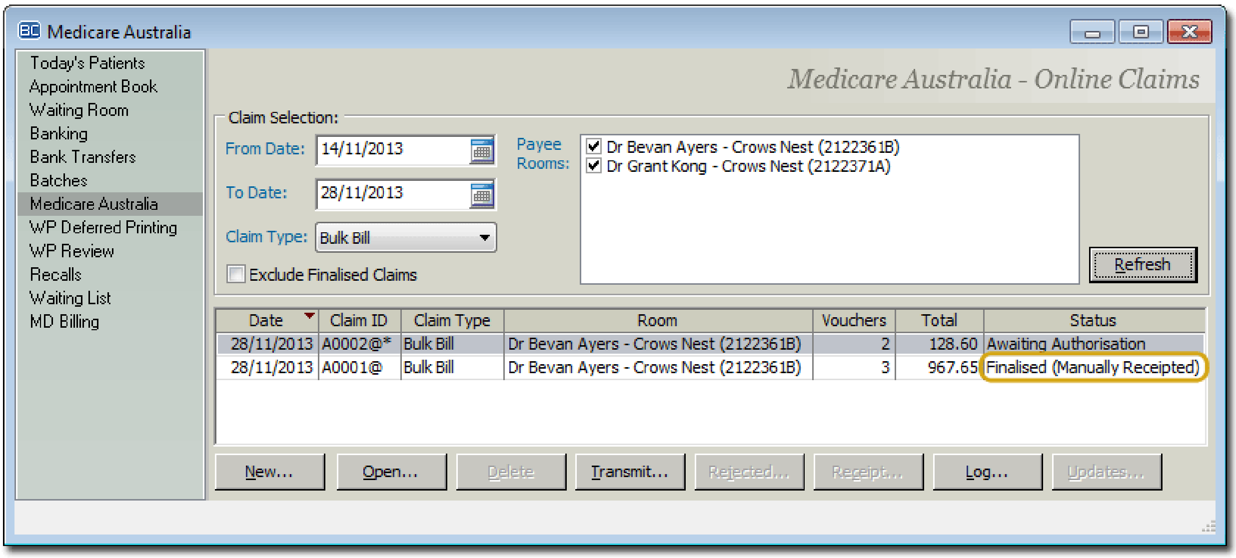
- Payments can be recorded for multiple patients.
- You can use multiple payment types, indicating which patient has made which payment, as shown in the Payment Method section of the window.
- In the example above, patients Marcy Abdul and David Anderson elected to round their payments up to the nearest dollar, resulting in their accounts being in credit, as indicated in the Option and Difference columns.
- Ensure that you tick the receipt allocation check box for each service item that you allocate payment to. All check boxes must be ticked, and you must have a positive payment balance in order to issue the receipt.

6. When you are ready to proceed, click Issue The **Issue Receipt** window appears.



The date of issue defaults to the current date, but can be modified if desired.

7. Click OK to confirm issuing the receipt. Notice that the Medicare Australia - Online Claims window now indicates that the claim was finalised by being manually receipted. *You must un-tick the **Exclude Finalised Claims** check box on this window to view finalised claims*.



Part Payments

Part payments occur when only a portion of the invoice is paid, and may include:

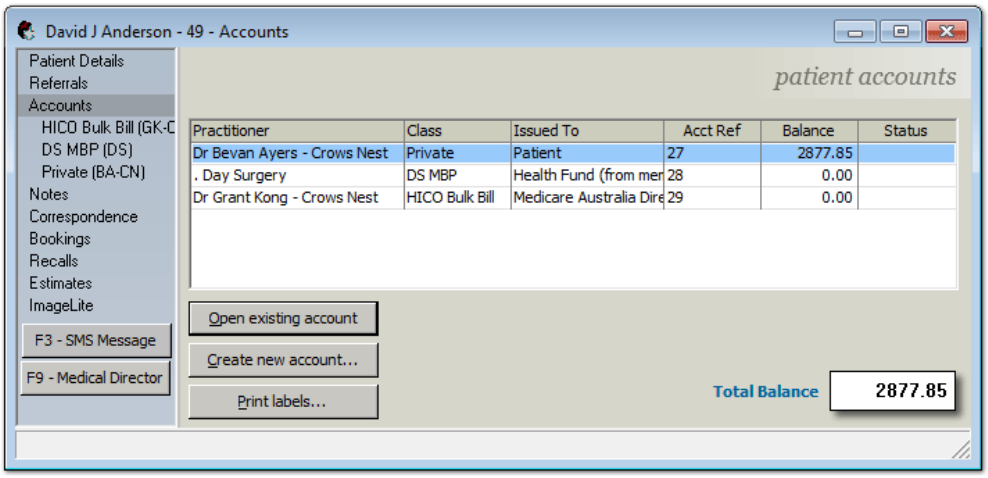
- The gap amount paid at the time of consultation
- Receipting part payments on surgical procedures (i.e. Medicare and Health Fund portion only)

Part payments can be made at the time of consultation (Combined Invoice/Receipt) or as payment of pre-issued invoice.

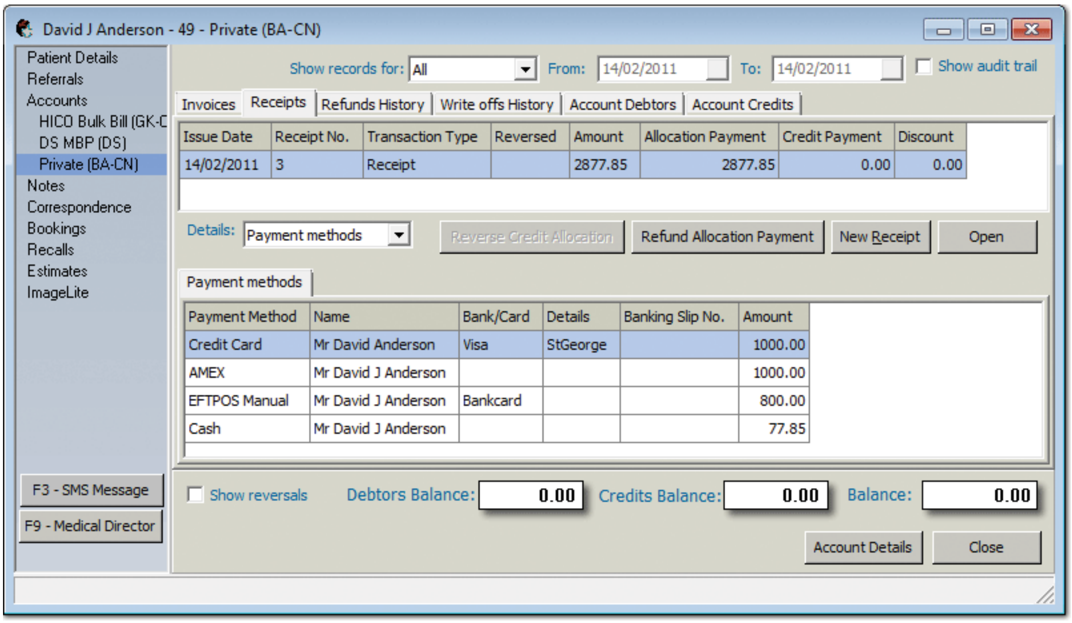
For a Combined Invoice/Receipt, select the **Add Receipt** button after billing the patient (see Combined Invoice/Receipting process), after issuing, jump to step 15

For a previously Issued Invoice;

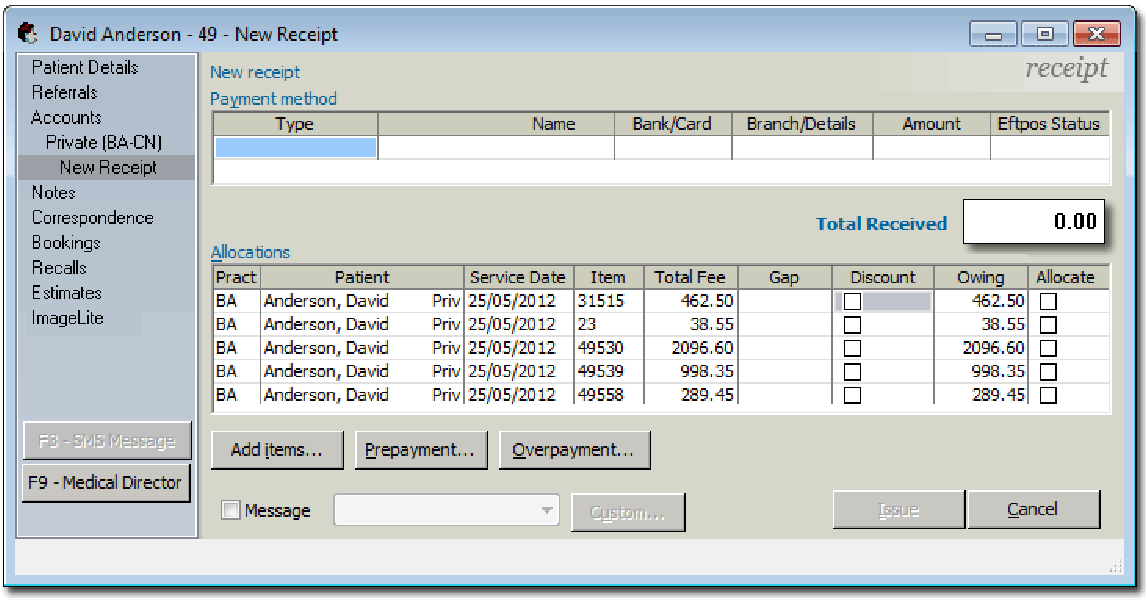
1. Open the patient's record.
2. From the Margin Menu, select **Accounts**. The list of accounts is displayed.



3. Select the account and click **Open existing account** You are presented with the details of the account. Select the **Receipts** tab.



4. Click New Receipt The **New Receipt** window appears.



5. Double-click in the **Type** field to display a drop-down list of acceptable payment types, or start typing the payment type to display the name.

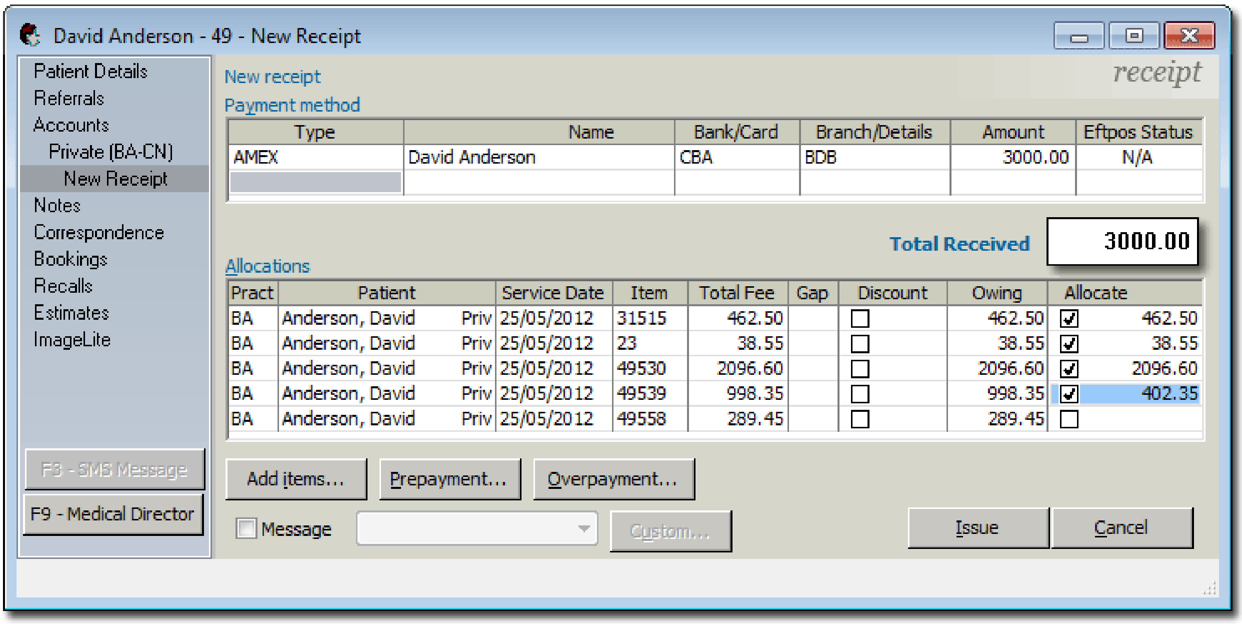
6. Enter the name of the payer (Cheque or Card). If paying by cash, the name is automatically inserted.

7. In Bank/Card choose from Visa, MasterCard or Other.

8. Enter the Branch/Details (if required).

9. Enter the amount received (which will be less than the required amount of the invoice, because in this instance you are only recording a part-payment).

10. In the **Allocate** column indicate which service items the part-payment should be allocated to, as shown in the example below. You can either tick an associated check box to allocate a full amount to an item, or you can over-type the allocated amount with another, lesser amount.



11. Click Issue to issue the receipt as normal. The Invoice screen displays the partial payment, and the Account Debtors screen displays the amount outstanding alongside the original invoice and receipted amounts.

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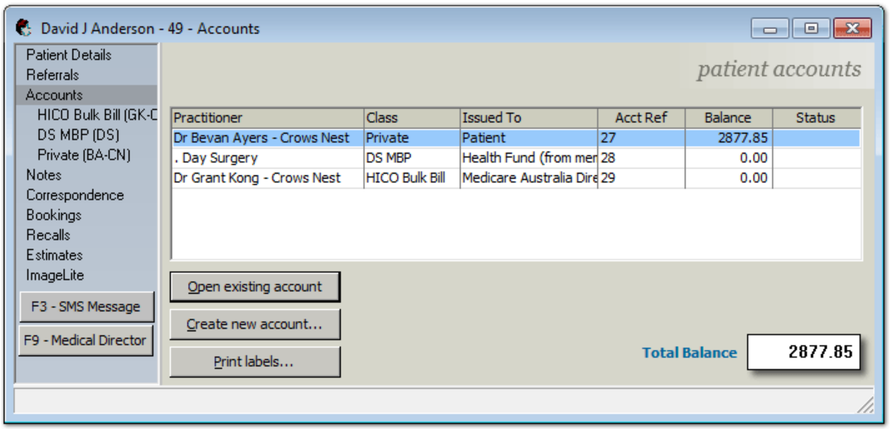
Overpayments

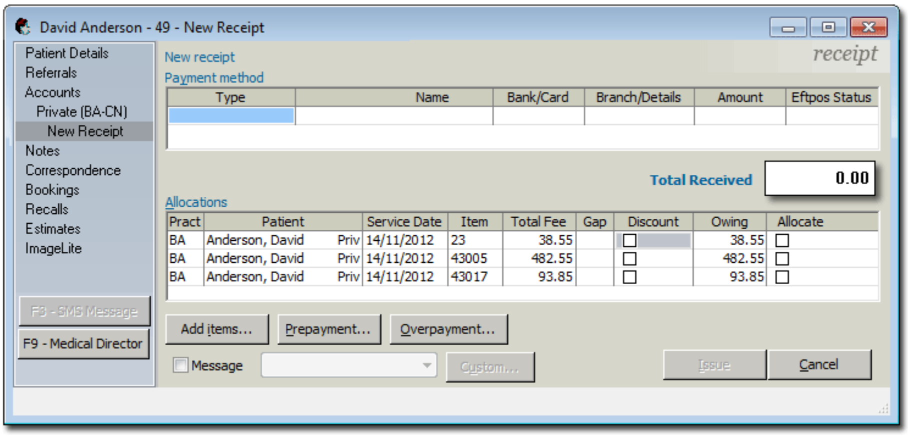
Overpayments may arise from time to time. How the Practice deals with overpayment is defined by the established business process within the Practice. This section is designed to show how to use MedicalDirector Blue Chip to record some scenarios.

A typical scenario has patients pre-paying (the gap as defined in the estimate provided earlier), to find later that the rebates from the Health Fund or Medicare have increased on that particular Service Item.

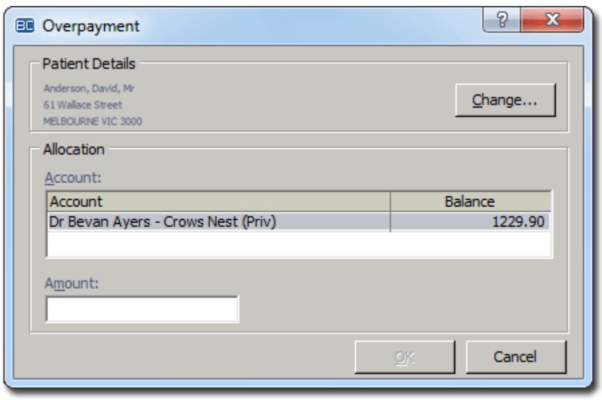
1. Open the patient's record.
2. From the Margin Menu, select **Accounts**. The list of accounts is displayed.



3. Select the account and click Open existing account Select the **Receipts** tab.
4. Click New Receipt A new receipt is generated, ready for your input.



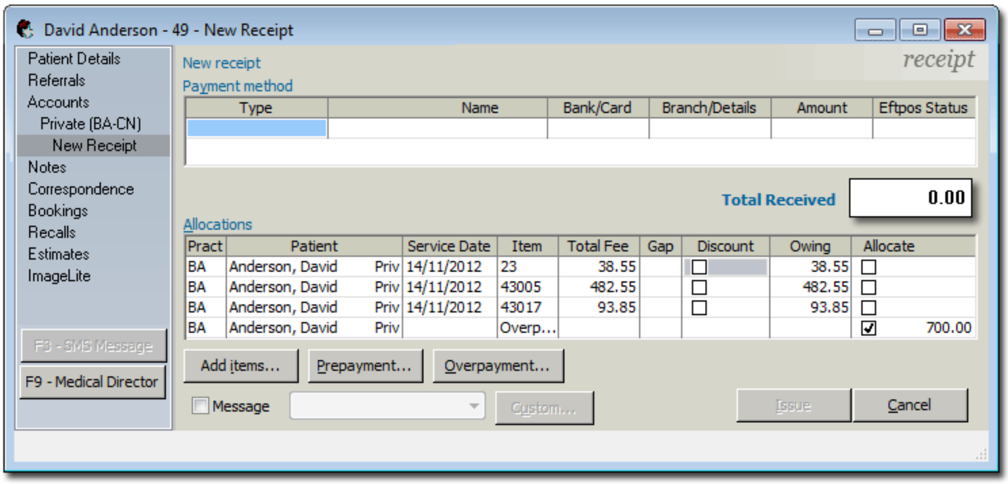
5. On the Receipt window, click Overpayment... The **Overpayment** window appears.



6. Enter the amount over-paid by the payer. This amount becomes the unallocated amount under the **Total Received**.

7. Click 

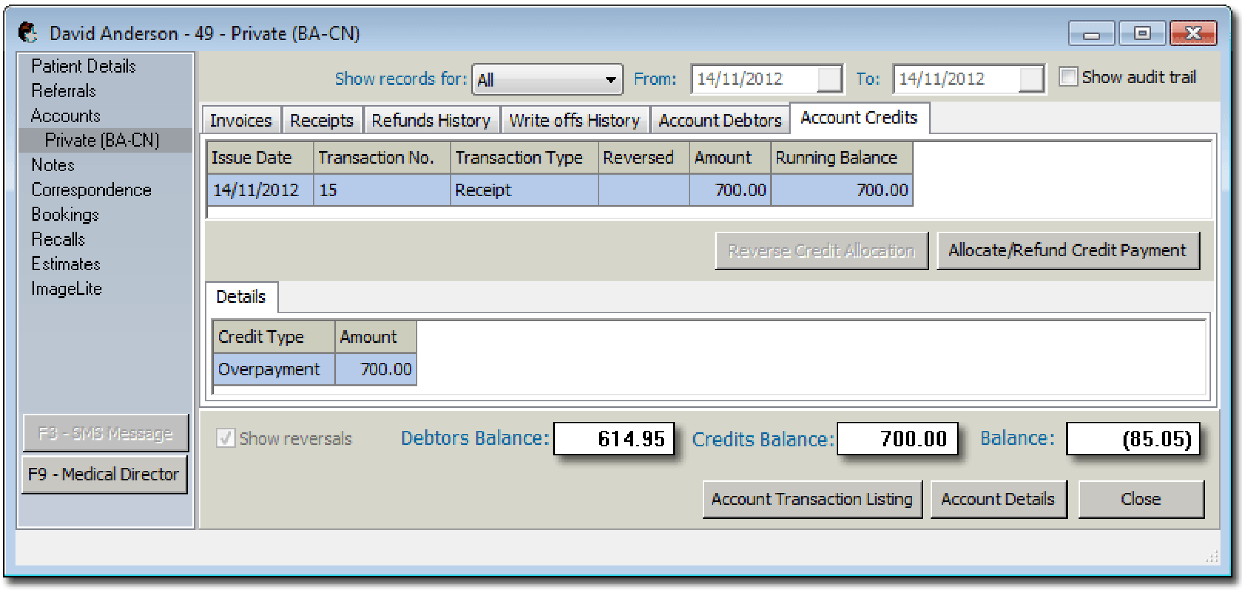
to confirm.



The **Allocate** section (in the example above) records the extra amount as an overpayment, allowing the receipt to be issued.

8. Click 

and issue the receipt as per normal. The Account Credits screen will indicate that the patient is in credit for the amount of the overpayment. The printed receipt will also show this.



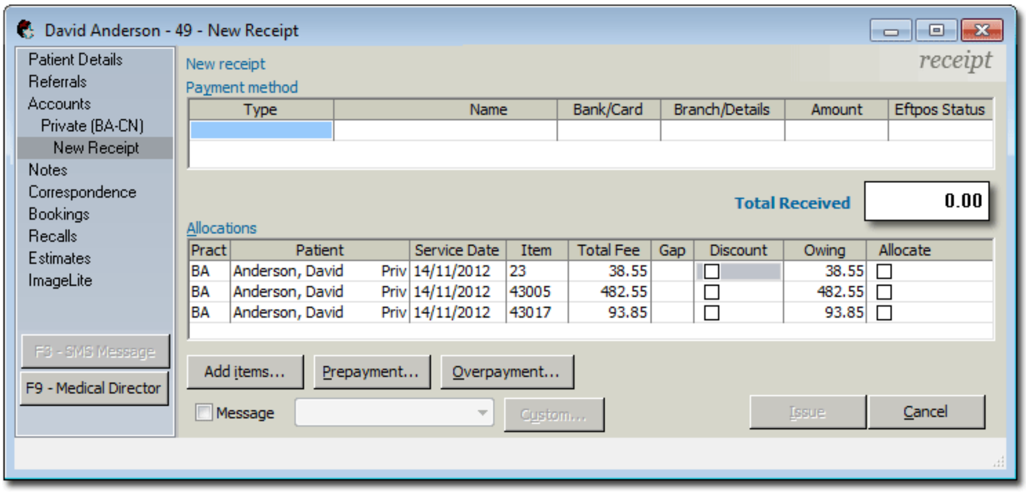
In the event that the rebate has increased, the invoice can be adjusted so that the items reflect the new fee value and the overpayment applied to the account.

Alternatively, a sundry invoice can be created for the amount overpaid and have the amount applied to the sundry invoice.

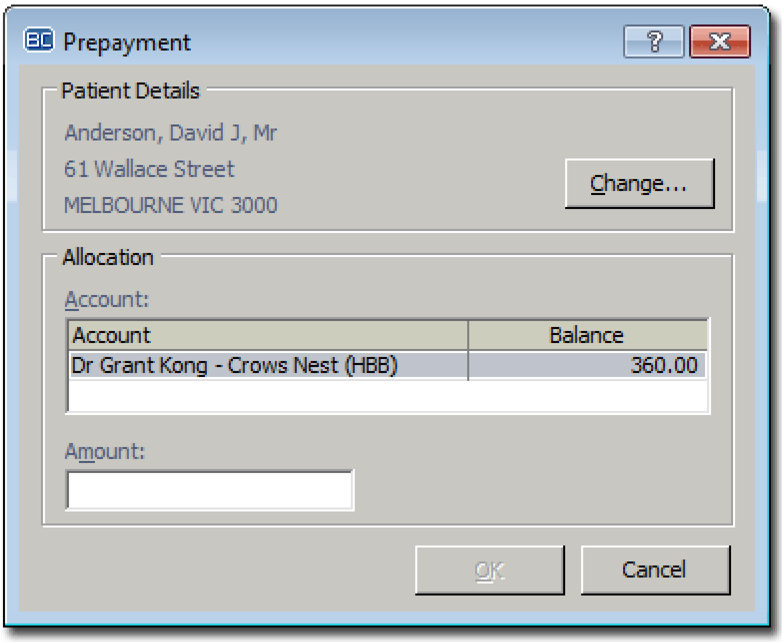
N.B. An overpayment cannot be written-off.

Pre-Payments

1. Open the patient's record.
2. From the Margin Menu, select **Accounts**. The list of accounts is displayed.
3. Select the account and click Open existing account You are presented with the details of the account. Select the **Receipts** tab.
4. Click New Receipt A new receipt is generated, ready for your input.



5. Within the **Payment Method** section, enter the method by which the prepayment is being made, and the amount.
6. When you are ready to indicate that this is a prepayment, click Prepayment... The Prepayment window appears.



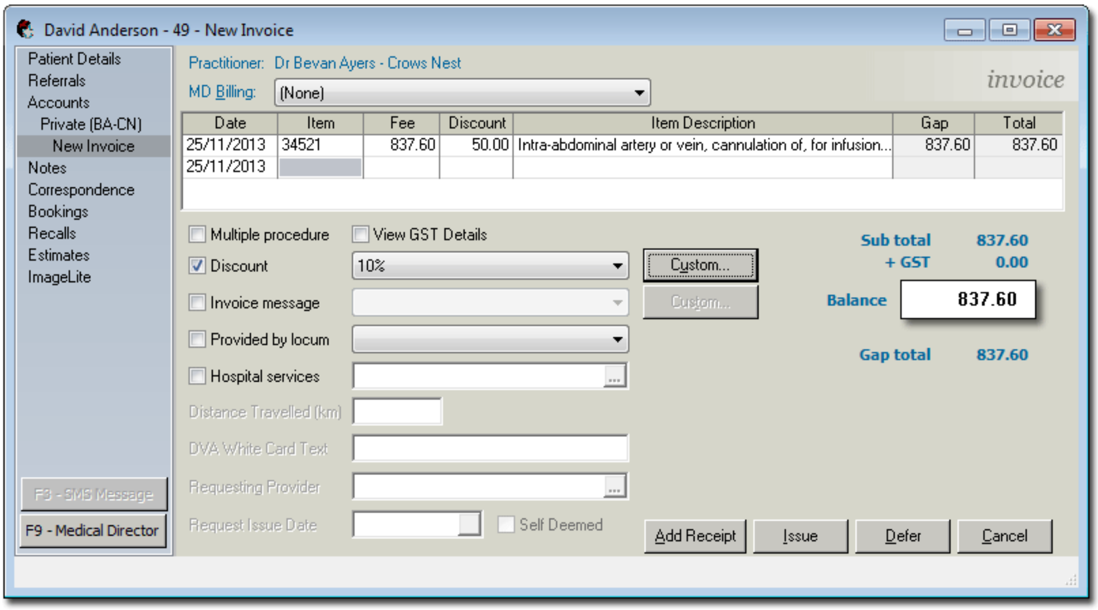
7. Enter the amount that you wish to allocate to prepayment in the associated text box.
8. Click OK to return to the receipt, after which you can issue and print or file the receipt. Note this receipt type does not contain the referral details and makes no mention of the medical item involved. This receipt is not claimable from Medicare.

Discounts

MedicalDirector Blue Chip allows you to offer a conditional discount to your patients, which might be seen as an incentive to settle their debts quickly. This is done by offering a percentage discount off the cost of the invoice, provided that the debt is settled within a given number of days. A typical scenario might be to offer a discount of 10% if the debt is paid within 7 days. This then rewards patients who pay their debts quickly, but enables you to still charge the full fee to patients who pay outside the stipulated period. A discount is offered when you create an invoice, as explained below. You cannot offer a discount when raising invoices to send to Medicare.

Standard Discounts

1. Ensure you have first specified a discount payment period. This is configured via the Payment Options tab of your Practice's Class settings. Without this configured, the Discount check box on the invoice window will not be available when issuing an invoice.
2. (Optional) You can specify that particular Service Items are discounted by default. This discount is per item, per practitioner, and configured via the Fees tab of the Practitioner Setup window.
3. (Optional) You can print a message about the discount and its terms on the invoice you issue the patient. A default message is supplied with MedicalDirector Blue Chip, and you can create your own customised messages via the Discount tab of the Message Setup window.
4. Create the invoice. During the invoicing process, tick the **Discount** check box to display the Discount column.



- If you enter a Service Item with a pre-defined discount applied to it, the value of that discount will automatically appear in the Discount column.
- If you wish to enter a customised discount, double-click the Discount field and enter a dollar value. The example above shows that a $50 discount has been manually applied to Service Item 34521.

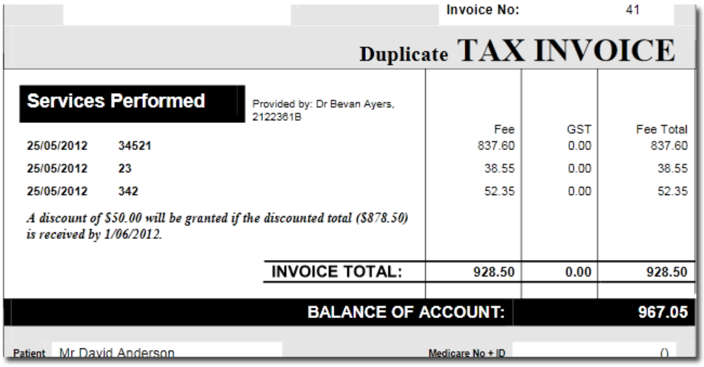
5. (Optional) To the right of the Discount check box is a drop-down menu that allows you to select from any pre-defined Discount Messages you might have, which when selected will appear on the invoice you issue the patient.

   For example, the default message ('10%', as shown in the image above) states: "A discount of $[DiscAmount] will be granted if the discounted total ($[DiscTotal]) is received by [DiscPayBy]." When printed, this reads "A discount of $50 will be granted if the discounted total ($450) is received by dd/mm/yyyy", dependent on the actual value of the invoice.

   From this drop-down list, choose either the default message, or one of your customised messages. You can also click 

to further customise any selected message.

6. When you are ready to issue the invoice, click the Issue button. Complete the invoice as normal. The printed invoice example below shows the discounted amount, and associated discount message.


Invoice No: 41

Duplicate TAX INVOICE

Services Performed Provided by: Dr Bevan Ayers, 2122361B

		Fee	GST	Fee Total
25/05/2012	34521	837.60	0.00	837.60
25/05/2012	23	38.55	0.00	38.55
25/05/2012	342	52.35	0.00	52.35
	INVOICE TOTAL:	928.50	0.00	928.50
	BALANCE OF ACCOUNT:			967.05

A discount of $50.00 will be granted if the discounted total ($878.50) is received by 1/06/2012.

Patient Mr David Anderson Medicare No + ID ()

7. When issuing a receipt, notice that the Discount column (shown below) automatically displays any discounts you have offered. If you are satisfied that the discount should be applied, tick the associated check box, and it is then that the fee for the given Service Item is adjusted. If you do not tick the Discount check box, the discount will not be applied. Note also, that you can override any discount value by double-clicking the value and manually adjusting it.

Non-standard Discounts

MedicalDirector Blue Chip also enables you to apply a discount after the invoice has been issued, even if no discount was offered when the invoice was originally created. In the Allocations section towards the bottom of the Receipt window, locate and tick the check box in the Discount column for a given service item and enter the discount that you wish to grant to that item. You can enter a specific dollar amount, or type in the percentage that you wish to apply, remembering to include the % sign. The balance for that item will be automatically allocated.

Adjustments

There are numerous situations where an adjustment is required for either an invoice or receipt. Note that not all users may be authorised to reverse transactions or to give refunds. Please check with your Practice Manager. User settings are configured via BC Secure.

The most important question to ask when adjusting/reversing a receipt is "Has the banking being settled?"

- If the adjusted receipt occurs on the same day as the original transaction, before banking is settled, then the receipt can be reversed. In this way the banking reflects the correct monies taken.
- If the banking has been settled then adjustments become complicated, as only those with sufficient permissions are able perform these, due to monthly close-off functionality, backdating and refunds. These actions will typically involve the Practitioner or Practice Manager as such adjustments will affect reporting accuracy.

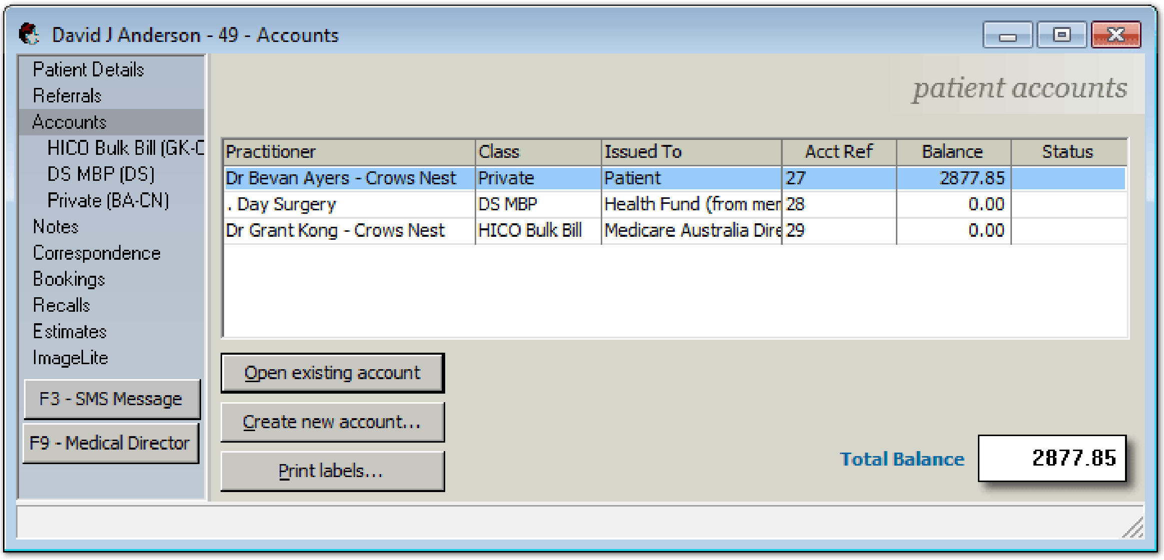
Adjusting a Receipt

For Practices that don't use Integrated EFPTPOS, a situation may arise where they generate a receipt from within MedicalDirector Blue Chip prior to the EFTPOS transaction being approved. In this scenario the patient may have gone to pay by EFTPOS and had their card declined, and must now pay by cash.

This information refers to adjusting MedicalDirector Blue Chip only, and does not provide for reversing an EFTPOS transaction on an EFTPOS machine (including Tyro).

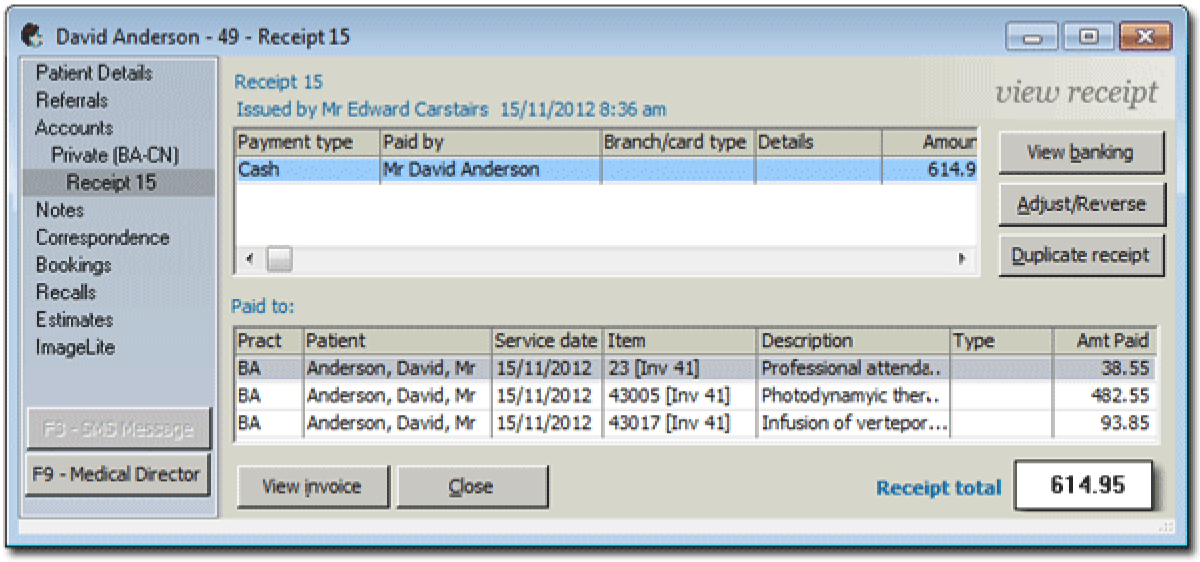
The following scenario deals with adjusting a receipt, in particular the Payment Type.

1. Open the patient's record.
2. From the Margin Menu, select **Accounts**. The list of accounts is displayed.

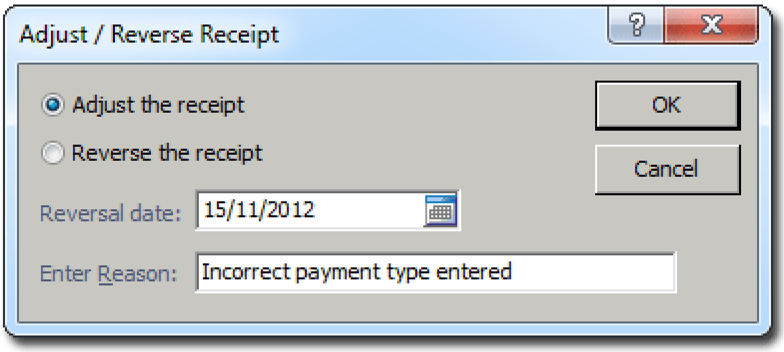


3. Select the account and click Open existing account You are presented with the details of the account.
4. Select the **Receipts** tab, and then select the receipt you wish to adjust.

5. Click Open You will be presented with the details of the receipt.

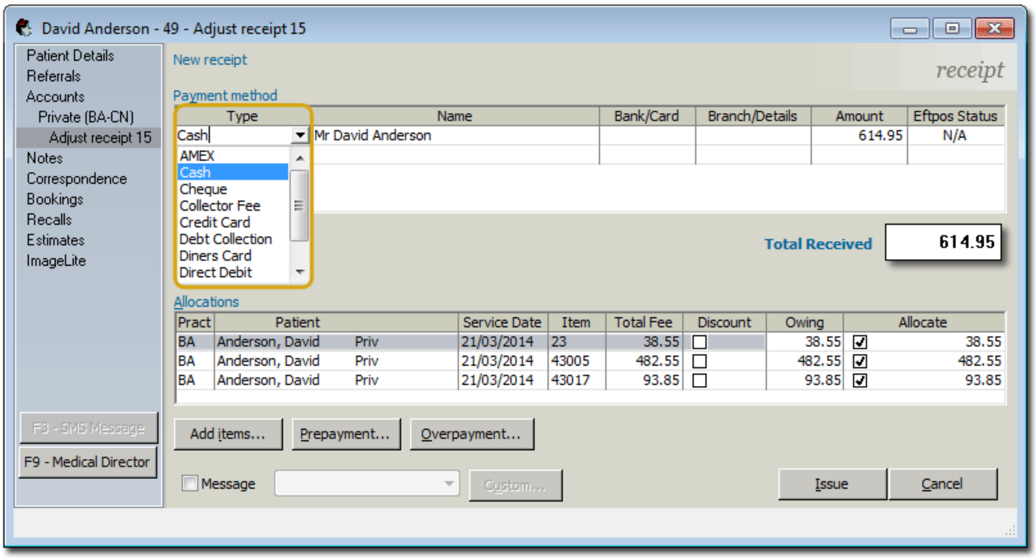


6. Click Adjust/Reverse The **Adjust / Reverse Receipt** window appears.



7. Enter a reason for the adjustment, and then click OK *Note that this is that same window you use to reverse a receipt.*

8. You will be presented with the Adjust Receipt window. In this example, the payment type is being adjusted. Make adjustments as necessary.



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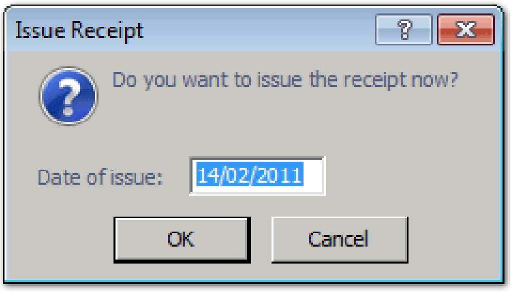
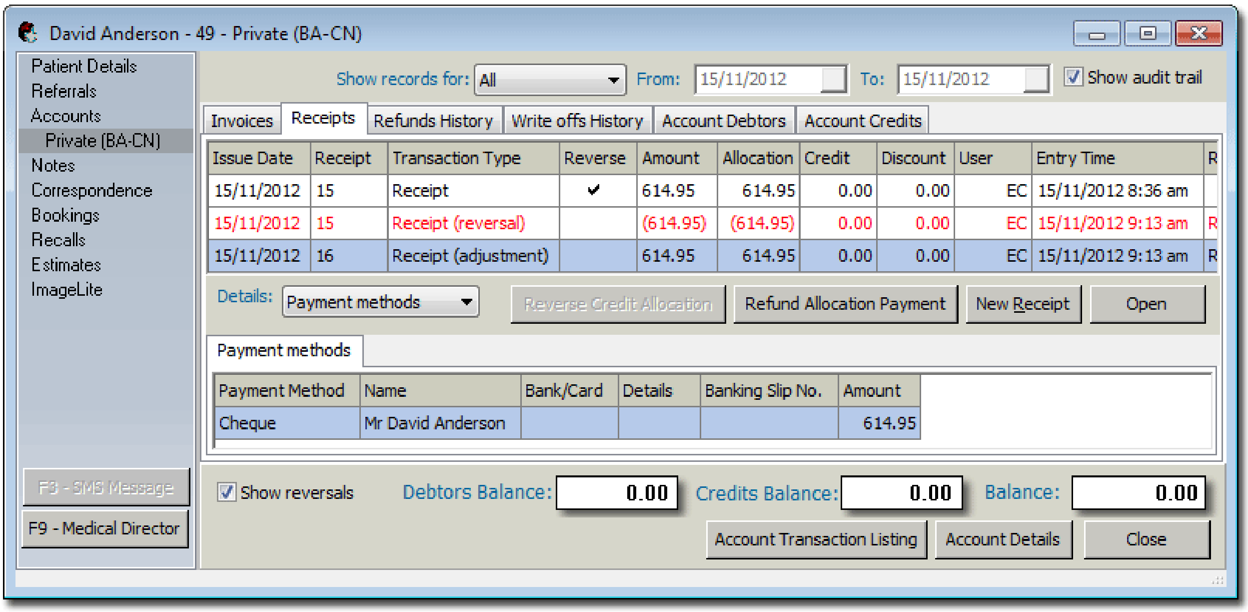
9. Click **Issue** to confirm the changes. The **Issue Receipt** window appears.



10. Click **OK** After printing the receipt you will be returned to the **Receipts** tab of the account. Tick the **Show Audit Trail** check box for full details of the adjustment.



Notice that the receipt now shows the adjustment;

- The original receipt reference is retained (on line 1), and shown as having been reversed.
- Line 2 shows the reversal (in red).
- Line 3 shows the adjusting of the receipt. The payment method (in the lower section of the window) now reflects the change made to the payment type (cheque) as opposed to the original payment method (cash).

By scrolling to the far right of the window, you can reveal the audit trail.

Allocation	Credit	Discount	User	Entry Time	Reason
614.95	0.00	0.00	EC	15/11/2012 8:36 am	
(614.95)	0.00	0.00	EC	15/11/2012 9:13 am	Reversing Receipt No 15 - Incorrect payment type entered
614.95	0.00	0.00	EC	15/11/2012 9:13 am	Replacing Receipt No 15 - Incorrect payment type entered

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Adjusting a Paid Invoice / Receipt

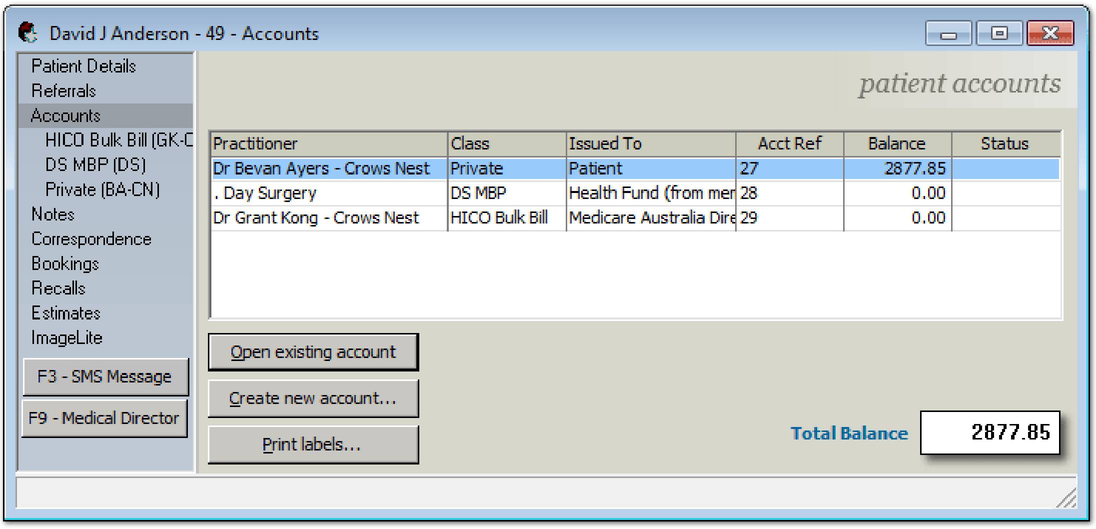
Scenario: A patient has been invoiced for an initial consultation which should have been a follow-up (which is a lesser amount); the patient has paid the invoice and **banking has not been settled** for the day.

The workflow is as follows:

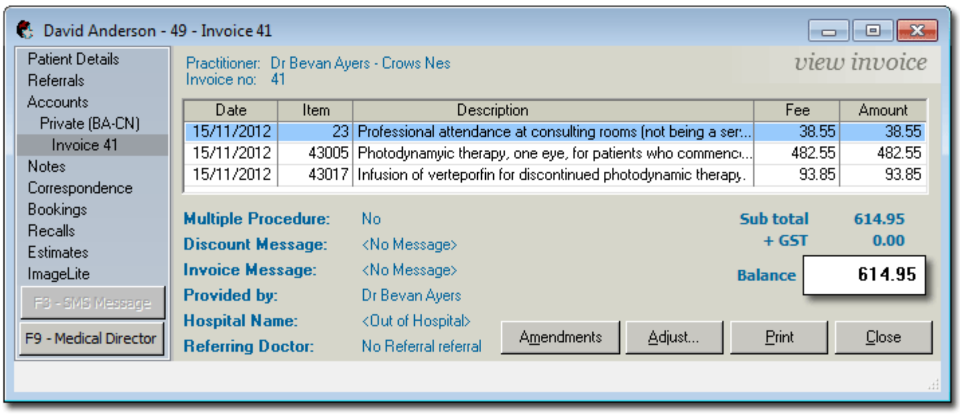
1. The invoice is adjusted to reflect the intended service item.
2. The receipt is adjusted to match the invoice's adjusted amount.
3. The difference is paid to the patient.

The above workflow should be used if the patient is still present. It does not describe how to alter EFTPOS transactions on an EFTPOS terminal (including a Tyro terminal) - it ensures MedicalDirector Blue Chip correctly reflects the accuracy of the account. If the patient has left the surgery, you should perform a refund after banking has been finalised.

1. Open the patient's record.
2. From the Margin Menu, select **Accounts**. The list of accounts is displayed.



3. Select the account and click Open existing account You are presented with the details of the account.
4. On the Invoices tab, select the invoice you wish to adjust and click Open You are presented with the details of the paid invoice.



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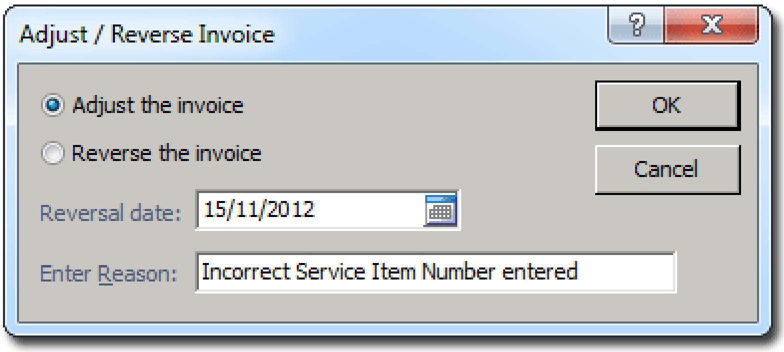
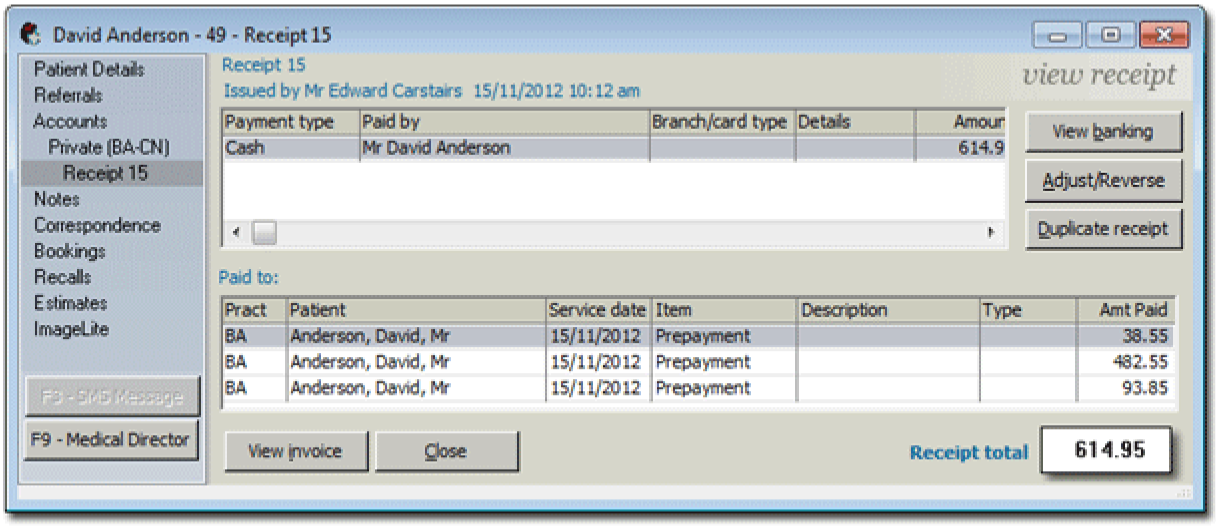
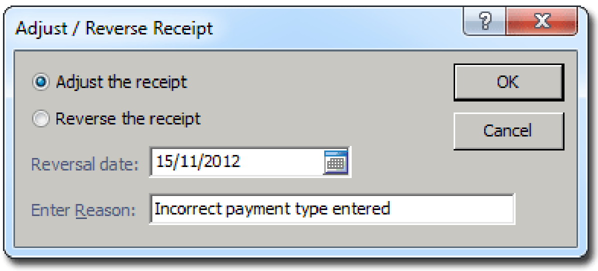
5. Click Adjust/Reverse The **Adjust / Reverse Invoice** window appears.



6. Enter a reason for adjusting the invoice. In this example it refers to the use of an incorrect Service Item Number.
7. Click OK You will be returned to the Invoice window where you can make the necessary adjustment(s).
8. Click Issue The **Issue Invoice** window appears.
9. Click OK to confirm the date of issue, and continue. The **Allocate Credit Amounts** window appears. You do not need to perform any actions at this window. Click OK to print/issue the invoice.
10. Select the **Receipts** tab. Select the receipt to adjust and click Open



11. Click Adjust/Reverse The **Adjust / Reverse Receipt** window appears.



12. Enter a reason for adjusting the receipt and then click OK
13. Adjust the receipted amount to match the corresponding invoice (allocations section of the receipts screen).
14. Deselect the Prepayment section of the receipt and allocate the payment to the corresponding invoice.

15. Click Issue and then OK. Print the receipt as normal.

16. Repay the patient the difference. Now the patient's MedicalDirector Blue Chip account reflects the change in service (and associated charges), and the banking accurately reflects the repayment. See below how all the relevant tabs reflect this workflow:

Invoices

Issue Date	Invoice No.	Transaction Type	Reversed	Invoice Items	Batch ID	Sundry	Amount	Paid	Write of
15/11/2012	41	Invoice	✔	23, 43005, 43017			614.95		
15/11/2012	41	Invoice (reversal)		23, 43005, 43017			(614.95)		
15/11/2012	42	Invoice (adjustment)		23, 43005, 105			596.10	596.10	

Line 1: the original invoice being flagged for reversal.

Line 2: the invoice being reversed.

Line 3: the new, adjusted invoice.

Receipts

Issue Date	Receipt No.	Transaction Type	Reversed	Amount	Allocation Payment	Credit Payment	Discount
15/11/2012	15	Receipt	✔	614.95	0.00	614.95	0.00
15/11/2012	15	Receipt (reversal)		(614.95)	0.00	(614.95)	0.00
15/11/2012	16	Receipt (adjustment)		596.10	596.10	0.00	0.00

Line 1: the original payment for the original invoice flagged for reversal

Line 2: the original payment allocation being reversed,

Line 3: the now unallocated payment now being held as a credit payment.

Line 4: shows the credit payment being reversed

Line 5: shows the new adjusted invoice being paid from some of the credit payment. The balance is returned to the patient.

Account Debtors

Issue Date	Transaction No.	Transaction Type	Reversed	Amount	Running Balance
15/11/2012	41	Invoice	✔	614.95	614.95
15/11/2012	41	Invoice (reversal)		(614.95)	0.00
15/11/2012	15	Receipt	✔	(614.95)	(614.95)
15/11/2012	15	Receipt (reversal)		614.95	0.00
15/11/2012	42	Invoice (adjustment)		596.10	596.10
15/11/2012	16	Receipt (adjustment)		(596.10)	0.00

Lines 1 and 2: the original invoice and corresponding receipt being flagged for reversal

Lines 3 and 4: the actual reversal of the invoice and receipt (in red).

Line 5: the newly created adjusted invoice

Line 6: the newly adjusted invoice being paid for with the new adjusted receipt.

Account Credits

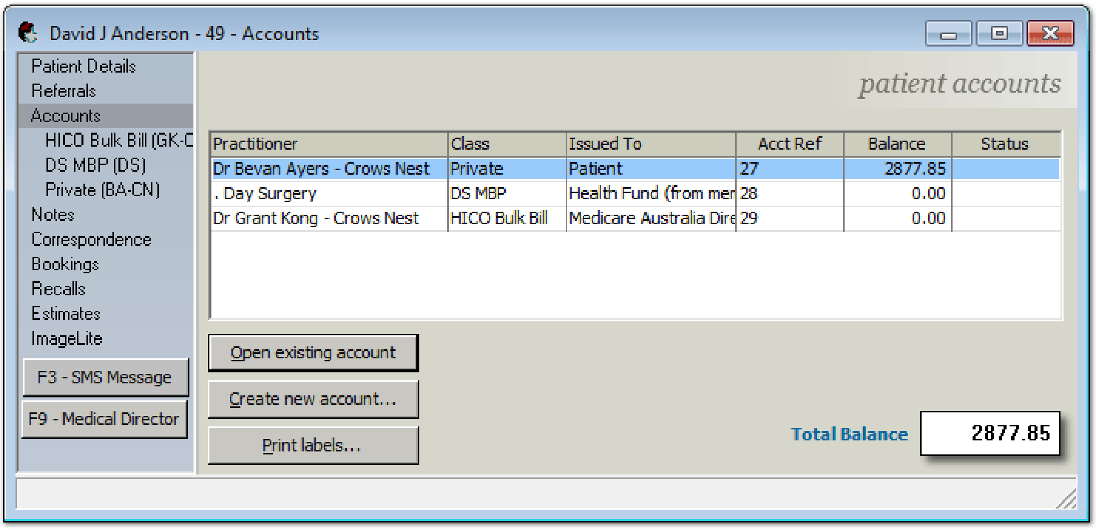
Issue Date	Transaction No.	Transaction Type	Reversed	Amount	Running Balance
15/11/2012	15	Receipt	✔	614.95	614.95
15/11/2012	15	Receipt (reversal)		(614.95)	0.00

The Account Credits tab shows the original receipt being reversed, placing the said amount into credit. When the credit payment is used to pay the adjusted invoice and the difference repaid to the patient, it is displayed as a reversal of the credit payment.

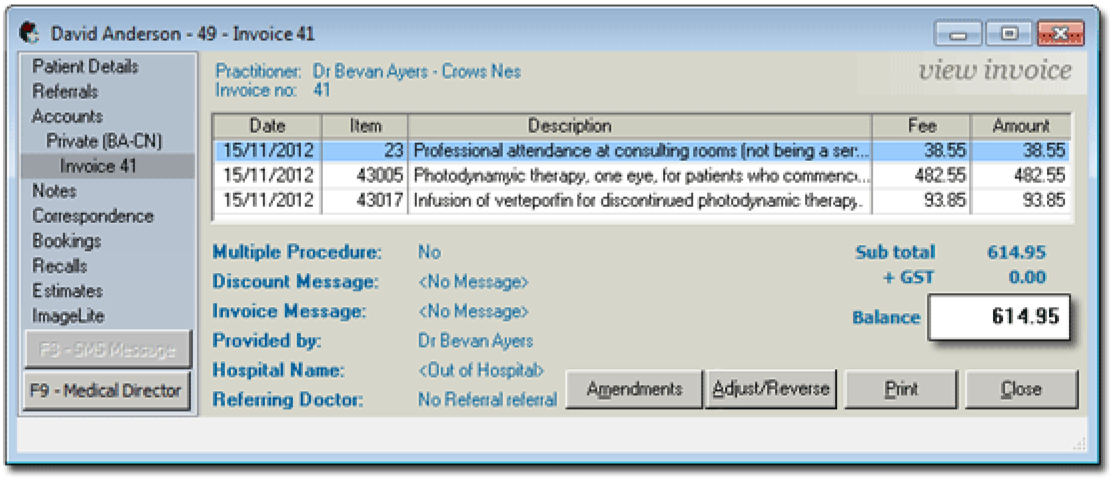
Adjusting a Standalone Invoice

Compared to the Paid Invoice/Receipt, adjusting a standalone invoice is rather straightforward. As no money has been paid, the timing (before or after banking has been finalised) is not so important. Timing does become important when an adjustment needs to be performed after a month has been closed off. In this instance, the Practice Manager or someone with appropriate permissions may need to reopen the month in order to apply the adjustment. In the following scenario, an item has been omitted from the invoice. It requires an adjustment in order to incorporate the extra service item.

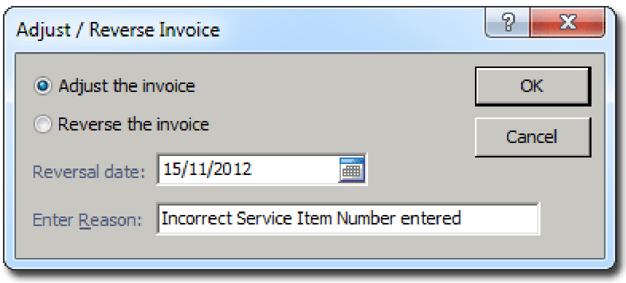
1. Open the patient's record.
2. From the Margin Menu, select **Accounts**. The list of accounts is displayed.



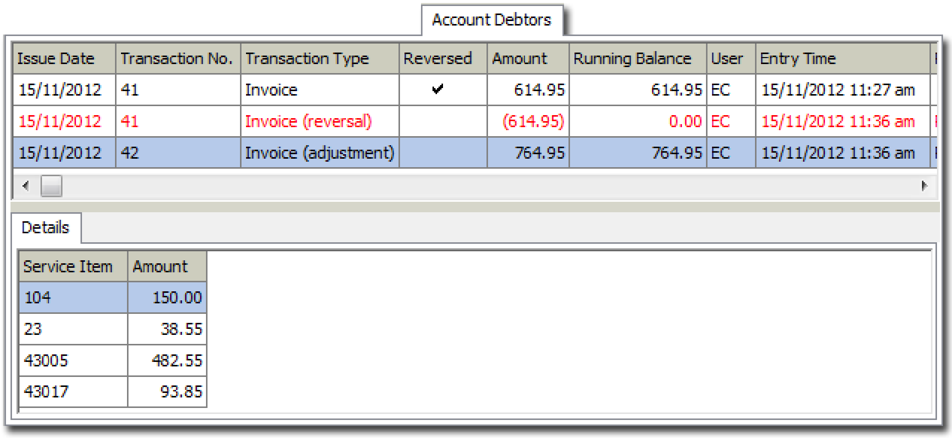
3. Select the account and click Open existing account You are presented with the details of the account.
4. Select the Invoice you wish to adjust and click Open



5. Click Adjust/Reverse . The **Adjust Invoice** window appears.



6. Enter a reason for the adjustment, and then click OK
7. When you are returned to the Invoice window, make the desired adjustment(s) to the invoice.
8. Click Issue The **Issue Invoice** window appears. Issue and print the invoice, as normal. When you are returned to the Invoices tab you will see the adjustments. Tick the **Show Audit Trail** check box to view and audit trail of the adjustment. The **Account Debtors** tab reflects the adjustment. In the details section, the invoice is itemised.



Issue Date	Transaction No.	Transaction Type	Reversed	Amount	Running Balance	User	Entry Time
15/11/2012	41	Invoice	✔	614.95	614.95	EC	15/11/2012 11:27 am
15/11/2012	41	Invoice (reversal)		(614.95)	0.00	EC	15/11/2012 11:36 am
15/11/2012	42	Invoice (adjustment)		764.95	764.95	EC	15/11/2012 11:36 am

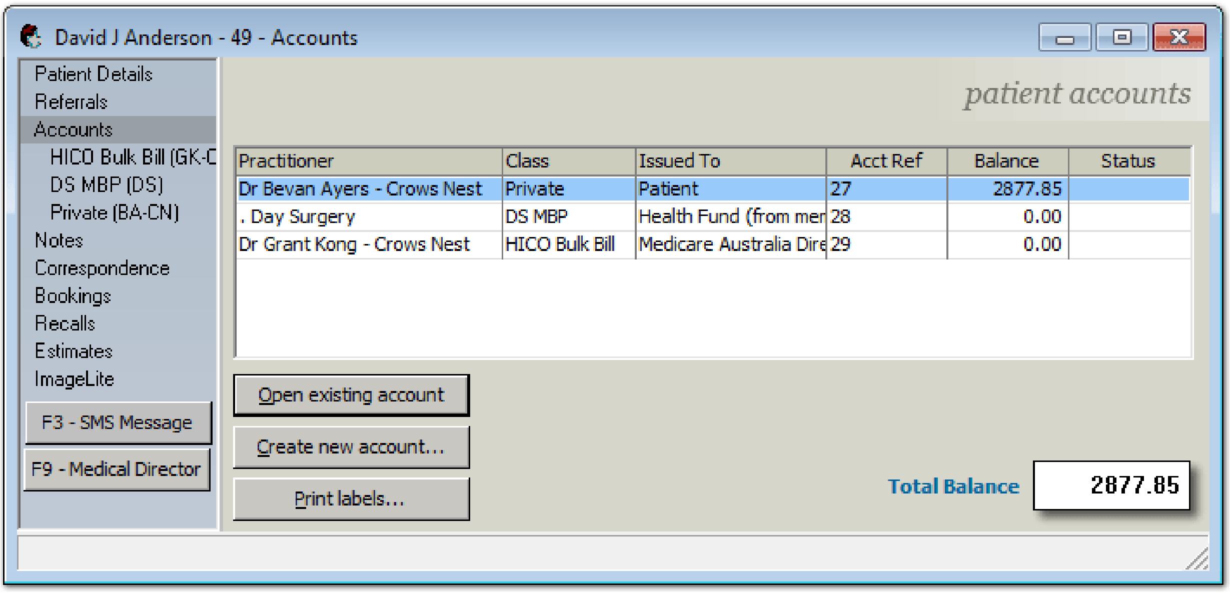
Service Item	Amount
104	150.00
23	38.55
43005	482.55
43017	93.85

Refunds and Write Offs

A refund is an adjustment to a receipt performed after banking has been settled. The types of refunds described in this section are: Allocation Refunds and Credit Payment Refunds. An Allocation Refund scenario would be when a paid invoice/receipt is required to be adjusted to a lower amount after banking. This scenario is identical to the paid invoice/receipt adjustment described earlier. The essential difference is that in this case, banking has been finalised.

Allocation Refund

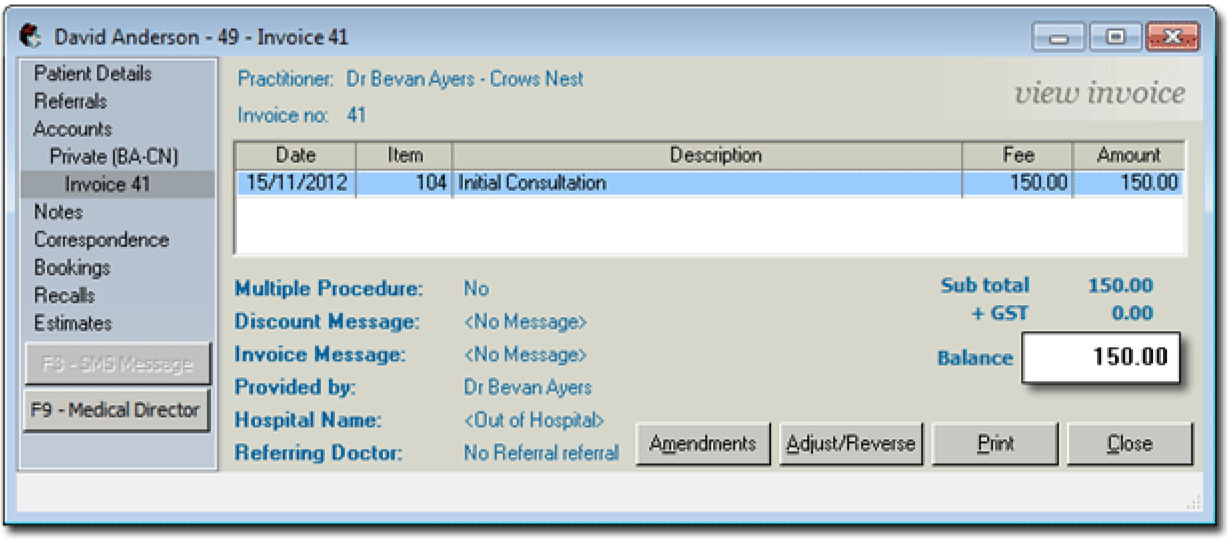
1. Open the patient's record. From the Margin Menu, select **Accounts**. The list of accounts is displayed.



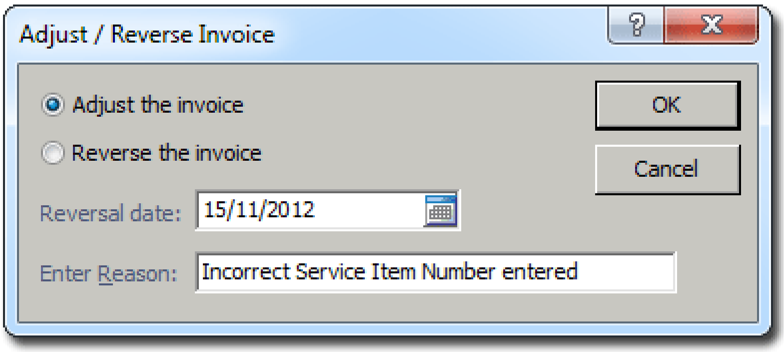
Practitioner	Class	Issued To	Acct Ref	Balance	Status
Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	

2. Select the account and click Open existing account You are presented with the details of the account.

3. Select the invoice you wish to adjust and click Open

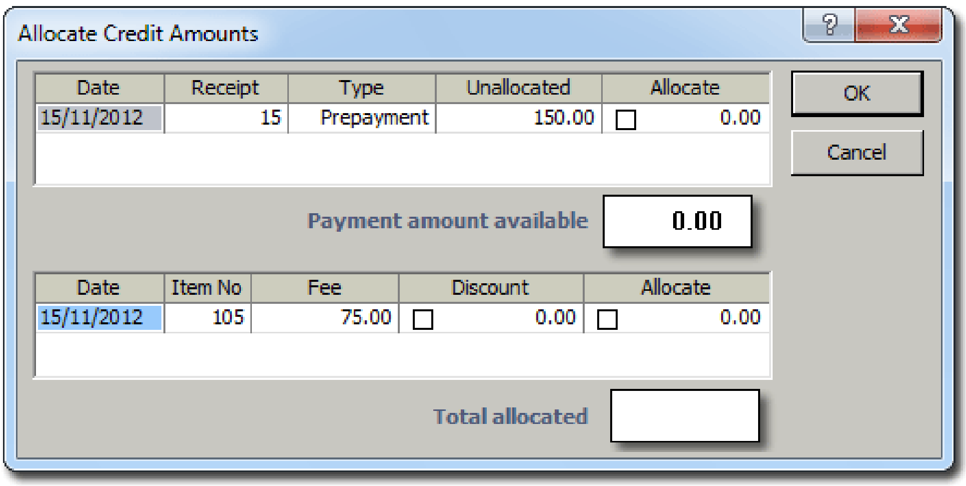


4. Click Adjust/Reverse. The **Adjust /Reverse Invoice** window appears.

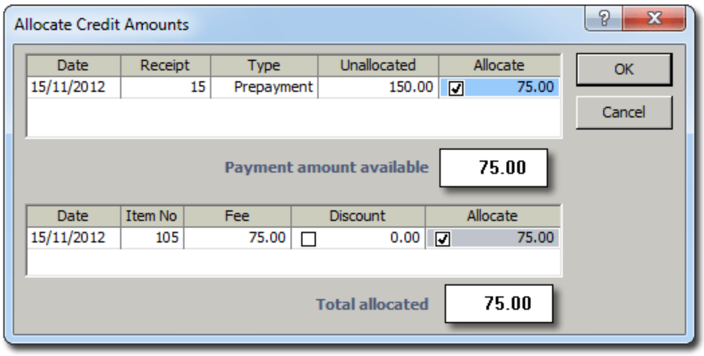


5. Enter a reason for the adjustment, and then click OK
6. When you are returned to the invoice window, alter the data (in this example, Item 104 was changed to Item 105).
7. Click Issue The **Issue Invoice** window appears. Click OK to continue.

   The invoice and receipt has been reversed. With the receipt reversed, the money taken is now unallocated and is recorded in MedicalDirector Blue Chip as a Credit Payment.



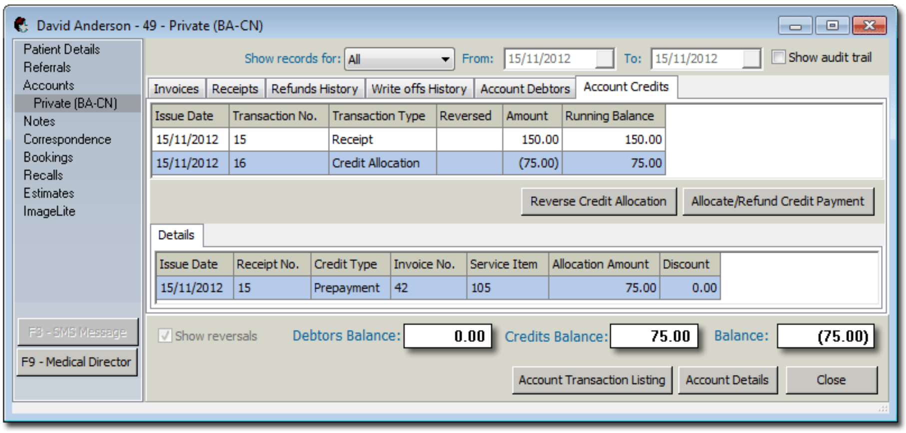
8. Allocate the credit amounts to the service items. This allocates the money now held in credit to the newly adjusted invoice. Ensure the top amount (money in credit) equals the bottom amount (invoice amount). To allocate credit, tick the check box for the service item you wish to cover, and then (if required) type in the amount to allocate.



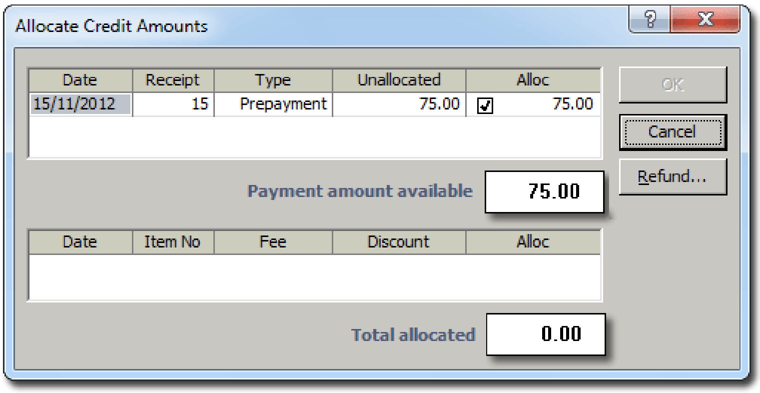
9. Click OK

10. Print the invoice.

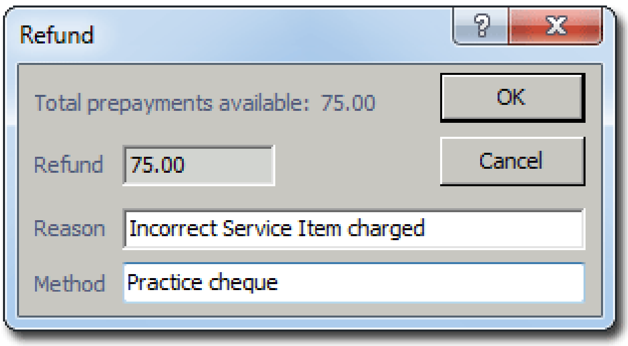
11. Select the **Account Credits** tab.



12. Click Allocate/Refund Credit Payment The **Allocate Credit Amounts** window appears.



13. Click Refund... The **Refund** window appears. Enter a reason for the refund and the method of refund.



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14. Click OK

The **Account Credits** tab shows the original receipted amount credited. It then shows the allocation of $75 to pay the adjusted invoice. Finally it shows the amount refunded.

Account Credits

Issue Date	Transaction No.	Transaction Type	Reversed	Amount	Running Balance
15/11/2012	15	Receipt		150.00	150.00
15/11/2012	16	Credit Allocation		(75.00)	75.00
15/11/2012	43	Refund		(75.00)	0.00

Reverse Credit Allocation
Allocate/Refund Credit Payment

Details

Credit Type	Receipt No.	Amount
Prepayment	15	75.00

The **Account Debtors** tab shows the original invoice and receipt (flagged) and their subsequent reversals (in red). The tab then shows the adjusted invoice being paid by the amount held in credit from the receipt reversal.

Account Debtors

Issue Date	Transaction No.	Transaction Type	Reversed	Amount	Running Balance
15/11/2012	41	Invoice	✔	150.00	150.00
15/11/2012	41	Invoice (reversal)		(150.00)	0.00
15/11/2012	15	Receipt	✔	(150.00)	(150.00)
15/11/2012	15	Receipt (reversal)		150.00	0.00
15/11/2012	42	Invoice (adjustment)		75.00	75.00
15/11/2012	16	Credit Allocation		(75.00)	0.00

Details

Service Item	Amount
105	75.00

The **Refunds History** tab records details of the refund.

Refunds History

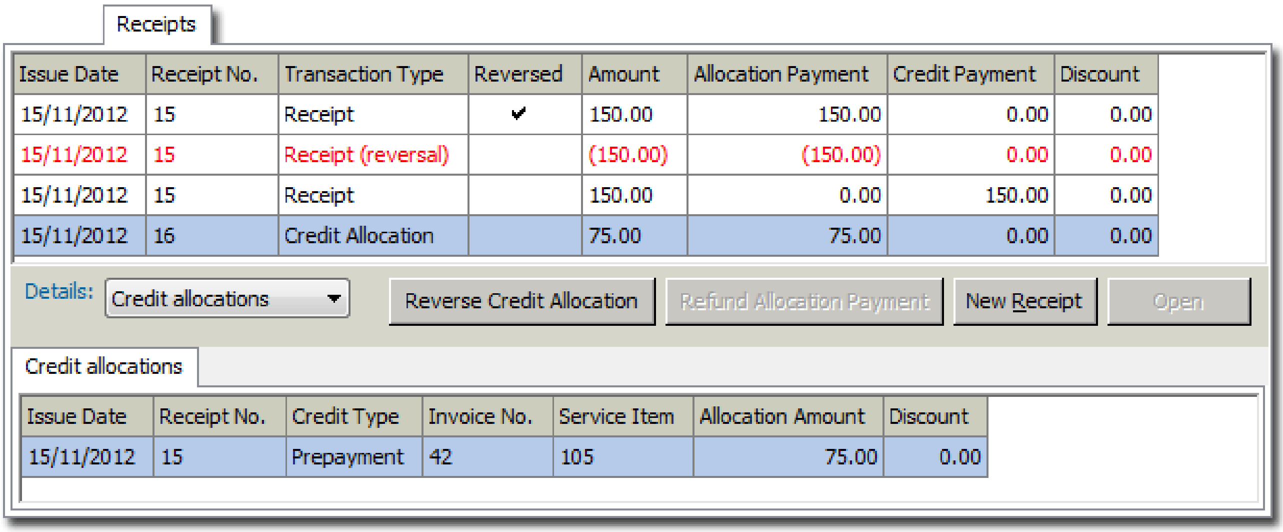
Issue Date	Refund No.	Refund Type	Transaction Type	Reversed	Amount	Refund Method	User	Entry Time
15/11/2012	43	Credit	Refund		75.00	Practice cheque	EC	15/11/2012 2:18 pm

Reverse

Refund Details

Credit Type	Receipt No.	Amount
Prepayment	15	75.00

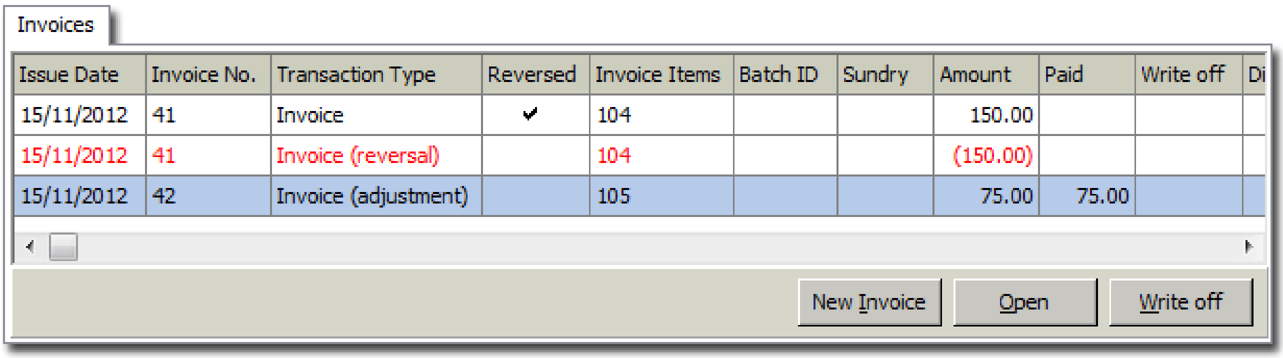
The **Receipts** tab shows original receipt and its allocation reversal. It also shows the amount as a credit payment before finally showing $75 allocated. Details of the credit allocation are shown in the lower portion of the screen.



Issue Date	Receipt No.	Transaction Type	Reversed	Amount	Allocation Payment	Credit Payment	Discount
15/11/2012	15	Receipt	✔	150.00	150.00	0.00	0.00
15/11/2012	15	Receipt (reversal)		(150.00)	(150.00)	0.00	0.00
15/11/2012	15	Receipt		150.00	0.00	150.00	0.00
15/11/2012	16	Credit Allocation		75.00	75.00	0.00	0.00

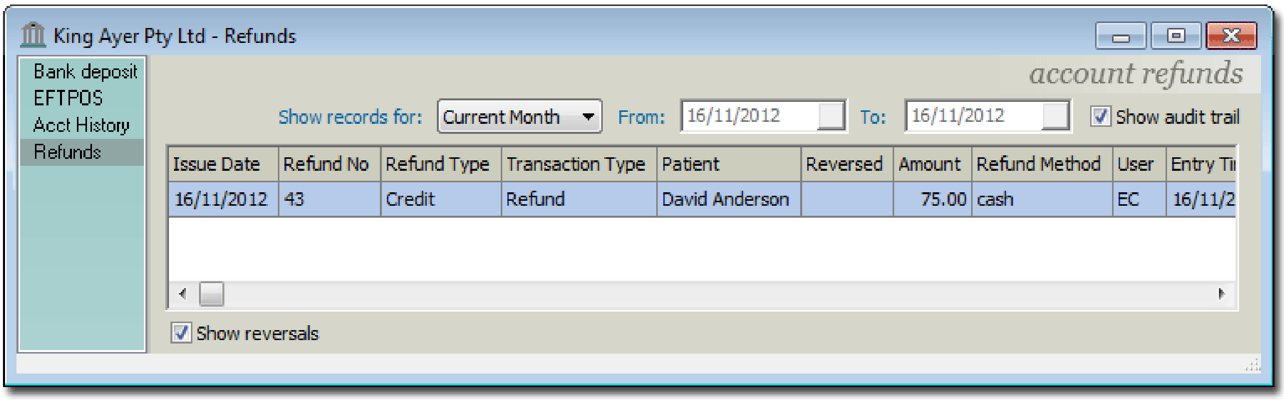
Issue Date	Receipt No.	Credit Type	Invoice No.	Service Item	Allocation Amount	Discount
15/11/2012	15	Prepayment	42	105	75.00	0.00

The **Invoices** tab shows the original invoice and its reversal. Lastly, the adjusted invoice is displayed.



Issue Date	Invoice No.	Transaction Type	Reversed	Invoice Items	Batch ID	Sundry	Amount	Paid	Write off	Di
15/11/2012	41	Invoice	✔	104			150.00			
15/11/2012	41	Invoice (reversal)		104			(150.00)			
15/11/2012	42	Invoice (adjustment)		105			75.00	75.00		

The **Accounts Refunds** window displays details of the refund. This is located in the Practitioner's bank account within the Banking module, within the Practice Explorer.

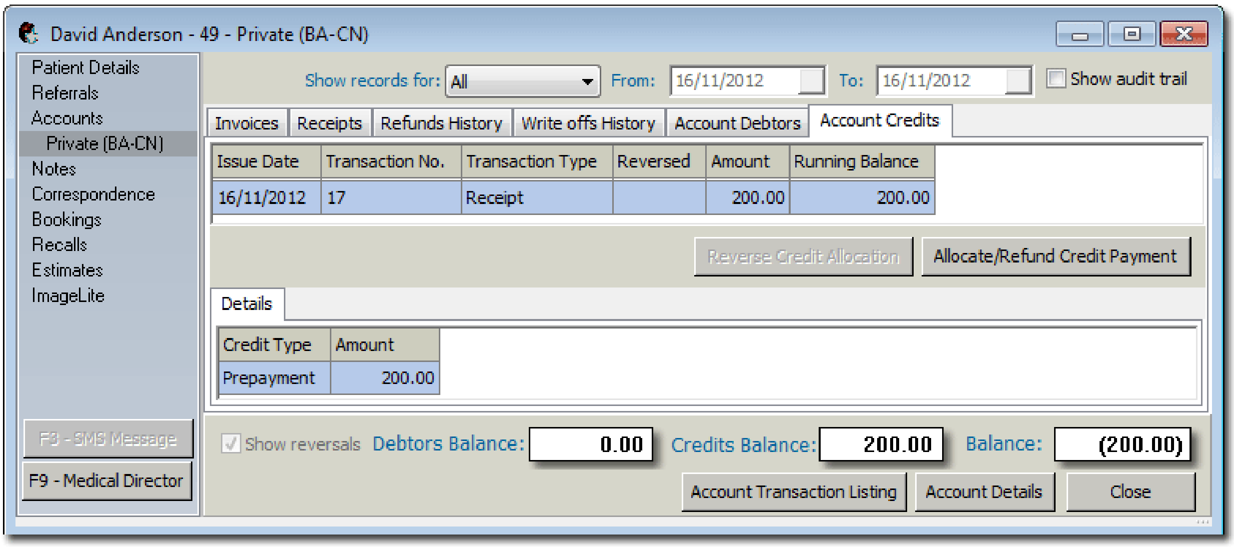


Issue Date	Refund No	Refund Type	Transaction Type	Patient	Reversed	Amount	Refund Method	User	Entry Ti
16/11/2012	43	Credit	Refund	David Anderson		75.00	cash	EC	16/11/2

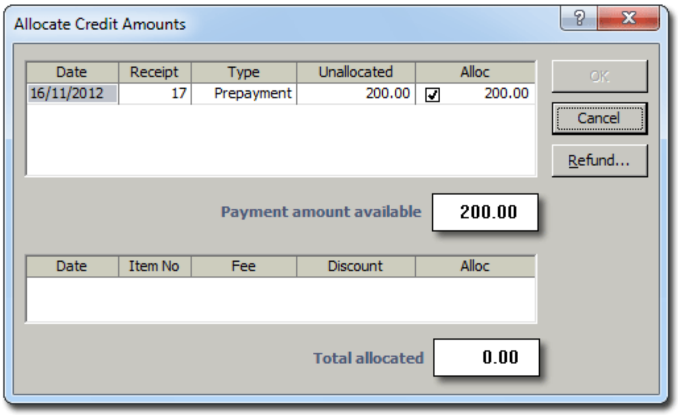
Credit Payment Refund

In this scenario, a patient has paid a prepayment which has been banked, but now would like the prepayment refunded.

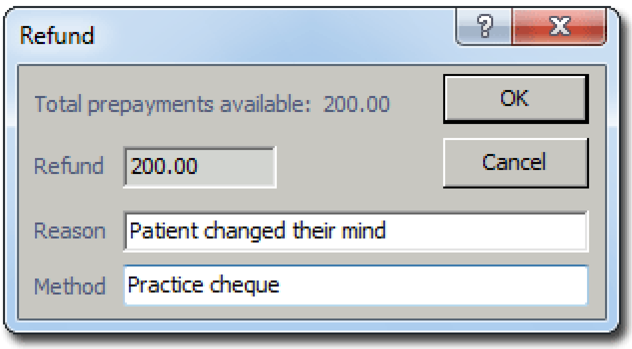
1. Open the patient's record. From the Margin Menu, select **Accounts**. The list of accounts is displayed.
2. Select the account and click **Open existing account** You are presented with the details of the account.
3. Select the **Account Credits** tab. Note the prepayment of $200 in the example below.



4. Click **Allocate/Refund Credit Payment**

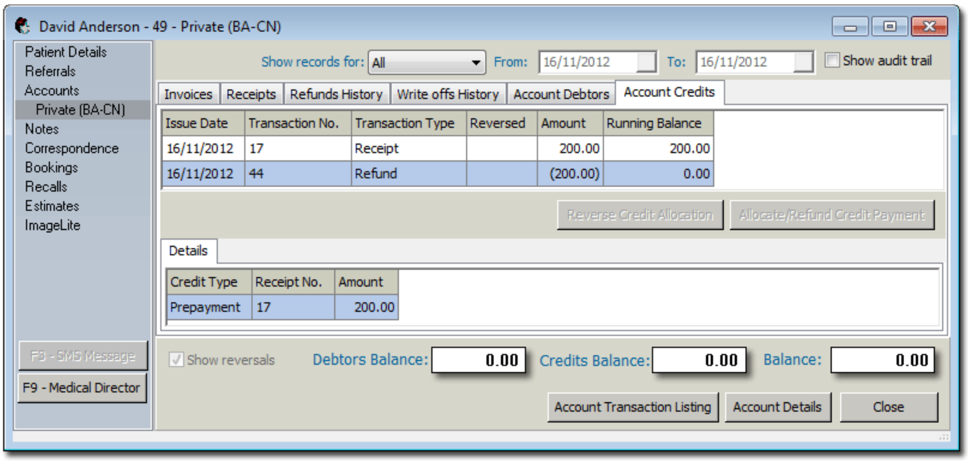


5. Click **Refund...** The **Refund** window appears.

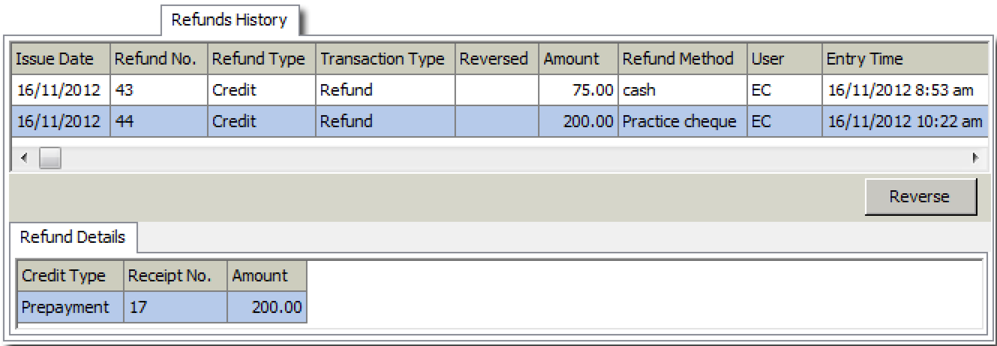


6. Enter a reason for the refund and the method of refund.

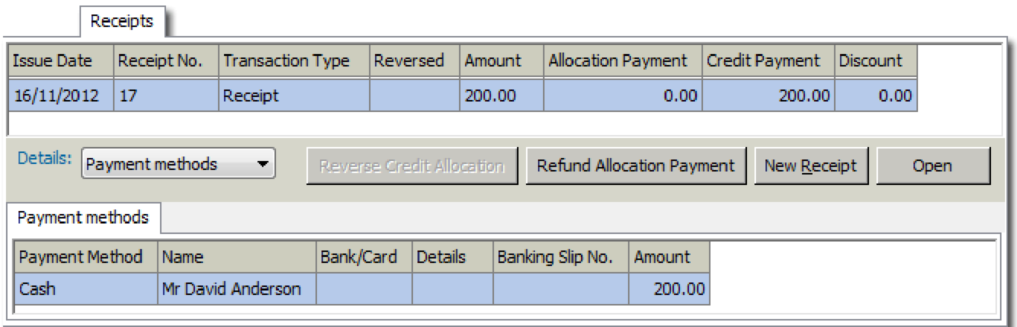
7. Click OK You will be returned to the Account Credits tab where the receipt for the reimbursed prepayment is now displayed.



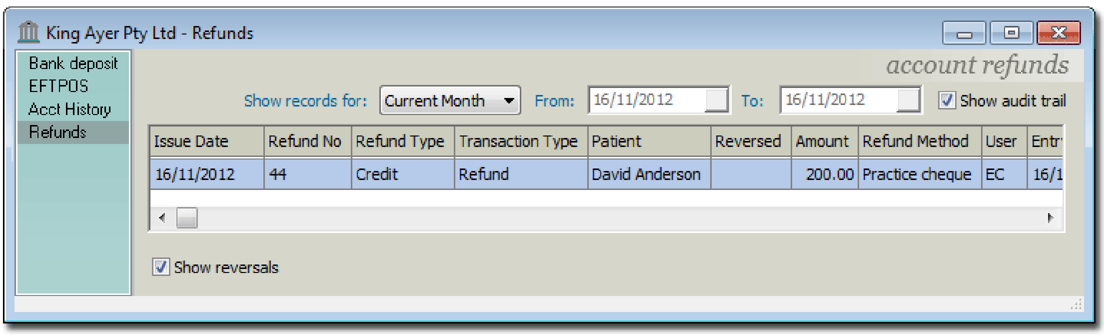
The **Refunds History** tab shows the details of the refund.



The **Receipts** tab shows details of the original receipt.



The **Account Refunds** window in the Banking module shows details of the refund. Details of past refunds can be displayed via the 'Refund Audit Trail' reports found in the Reports module of MedicalDirector Blue Chip.



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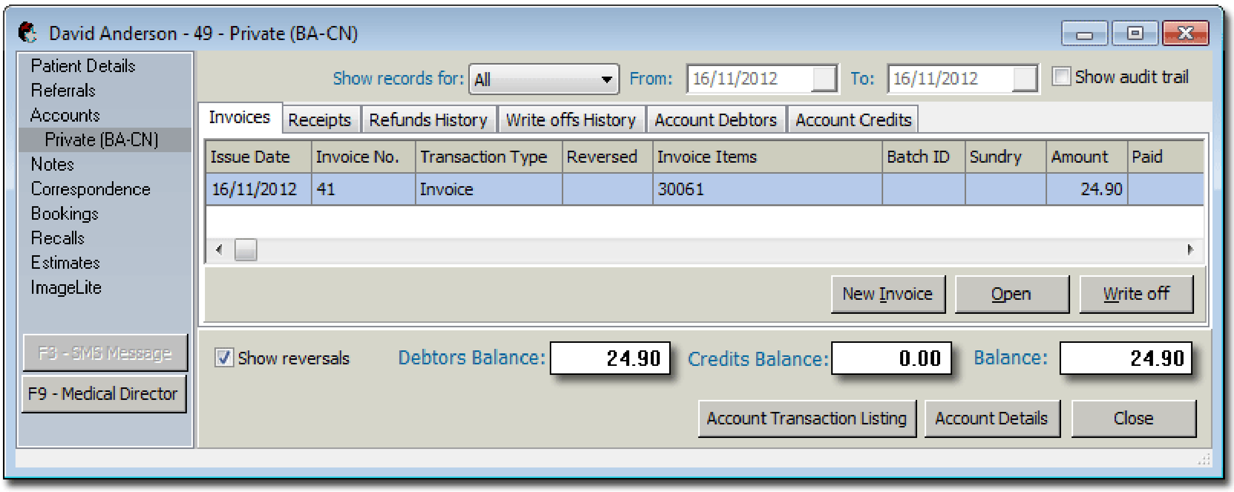
Write-offs

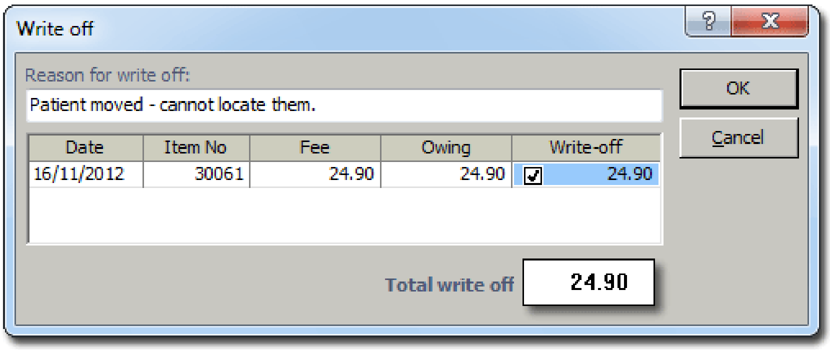
A write-off is when the Practice is accepting a loss. Only MedicalDirector Blue Chip users with the appropriate permissions may write-off an amount.

Note: Although it might seem convenient to use the write-off functionality to administer discounts, or to avoid performing an adjustment, this is not what it was designed for and may lead to misleading reports.

1. Open the patient's record. From the Margin Menu, select **Accounts**. The list of accounts is displayed.
2. Select the account and click Open existing account You are presented with the details of the account.

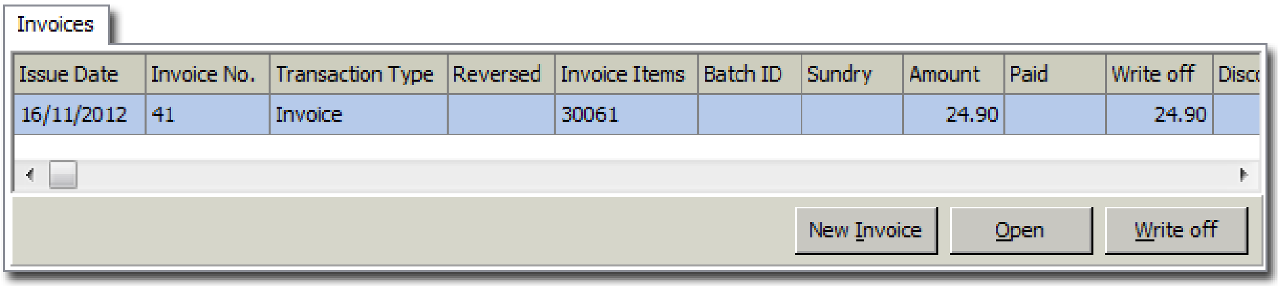


3. Click Write off The **Write Off** window appears.

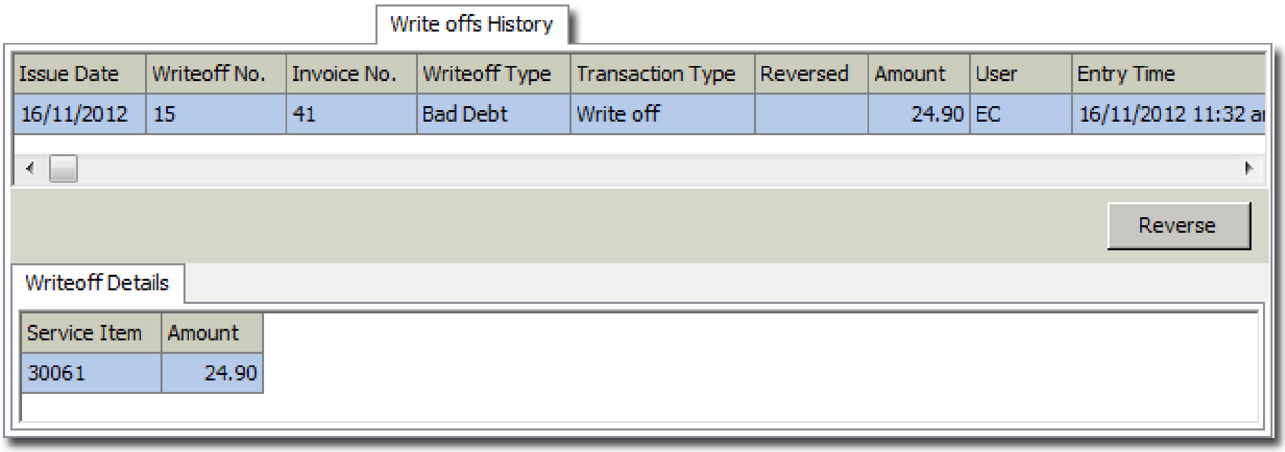


4. Enter a reason for the write off.
5. Enter the amount to write off – either the entire amount (by ticking the associated check box), or part thereof (by manually entering a value).
6. Click OK to confirm.

The **Invoices** tab registers the write off. By ticking the **Show Audit Trail** checkbox, the user, time/date and reason can be viewed.



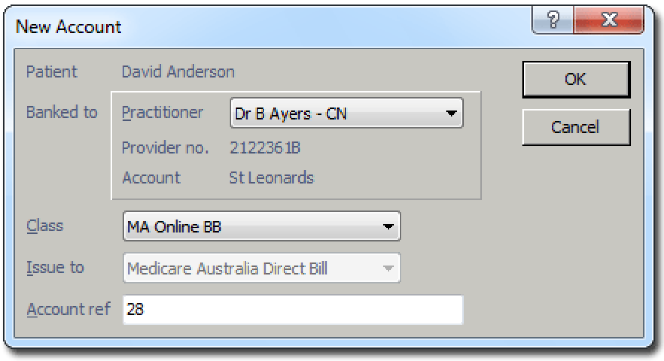
The **Write Offs History** tab shows the audit trail (always). In the details (lower) part of the screen, the associated invoice is listed. The write off type will always read 'Bad Debt' because essentially that is what it is; an amount that will not be recovered.



Medicare / DVA Online

The recipient is Medicare (Bulk Bill) or Dept of Veterans' Affairs, and is sent online in real time. Processing time is around 48 hours for Bulk Bill amounts and a little longer for Veterans' Affairs. The following outlines processing the actual online claim (batch) and receipting it. Invoicing for Medicare online is similar to invoicing a patient privately except that:

- Descriptions are not transmitted to Medicare.
- Bulk Bill and DVA print-outs differ to other classes.
- Veterans' Affairs requires a hard copy of each *signed* voucher sent to Veterans' Affairs for assessment before the batch is paid.

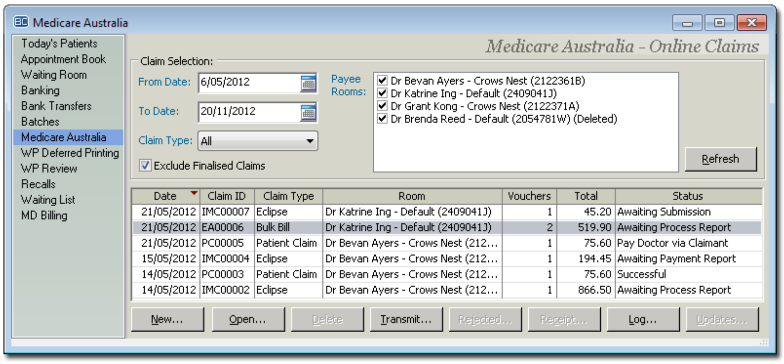


In the example at right, the class is called MA Online BB but may be named differently at your Practice. Create an invoice as normal. If necessary, to advise Medicare of specific information (such as "Not Normal Aftercare"), after entering a Service Item Number, right-click the **Description** field and select 'Add Service Text'. Type in a message or use the drop down option to select from preset messages. This field can accept up to 30 alphanumeric characters.

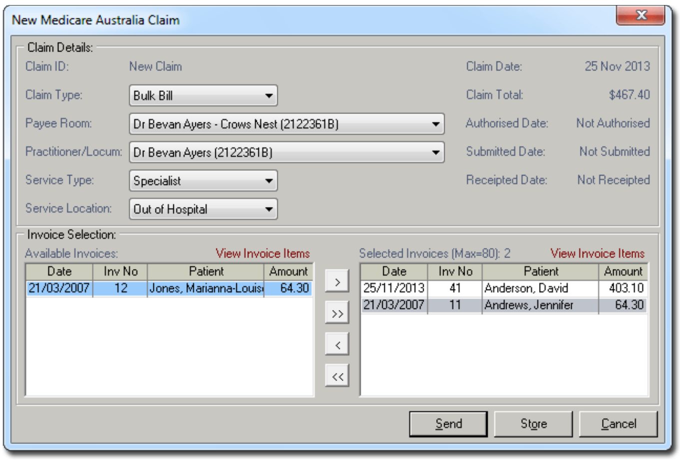
Click the **Issue** button to issue to invoice, as normal. Note that the Practice is no longer required to print a copy for its records. In accordance with Medicare's directive, the patient should still sign for service. When the Invoice is issued, it appears as a standard invoice.

Sending the Claim

1. From the Practice Explorer, select **Medicare Australia**. The **Medicare Australia – Online Claims** window appears.



2. Click New... to display the issued invoices waiting for processing.



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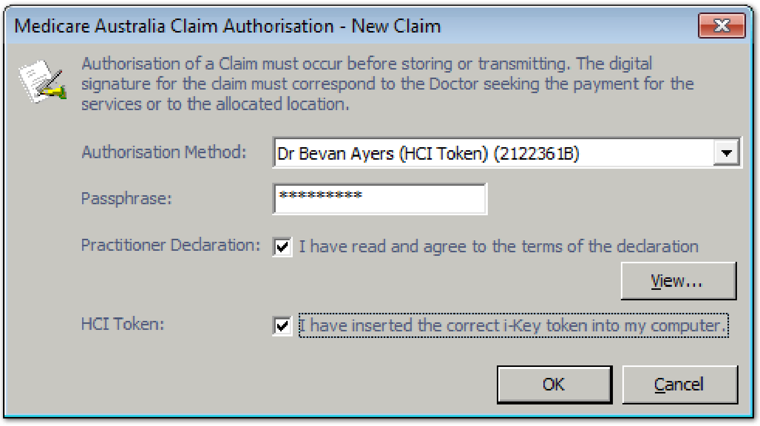
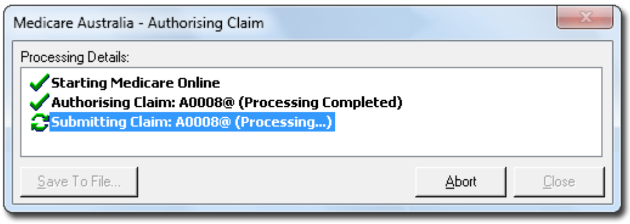
3. Click the single **>** or double headed **>>** arrow buttons to move invoices from the **Available Invoices** section to the **Selected Invoices** section.

4. Click  The Medicare Australia Claim Authorisation window appears.



You can select to use a location certificate or individual certificate when sending claims. The example above shows the latter option.

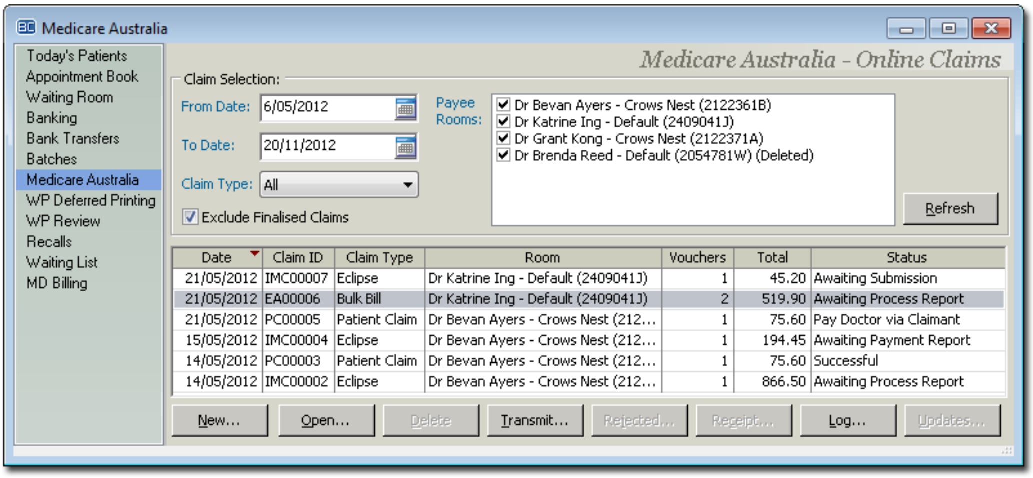
5. Click 



When the claim has been sent without errors, its status becomes 'Awaiting Process Report'.

Claim Status

To check on any claim, access the Medicare Australia Online Claims window within the Practice Explorer.



- Click the **Status** column header to sort the data by type of Status.
- Click the **Refresh** button to reformat the data.
- Click the **Claim Type** column header to sort entries by DVA and Bulk Bill (after hitting Refresh).

Note that the Claim ID column (formerly known as Batch Number) is called the 'PMS Claim ID' when communicating with Medicare.

Buttons on the lower section of this window:

- **NEW:** prepare and authorise vouchers to be sent in a claim.
- **OPEN:** claims that have not been transmitted can be opened individually and edited.
- **DELETE**: claims that have not been transmitted can be deleted. Their associated vouchers will be available to select within a new claim. Claims that have been transmitted can be deleted on the same day that they were sent provided the Practice notifies Medicare by phone on 1800 700 199, that the claim is being deleted.

  Notes:

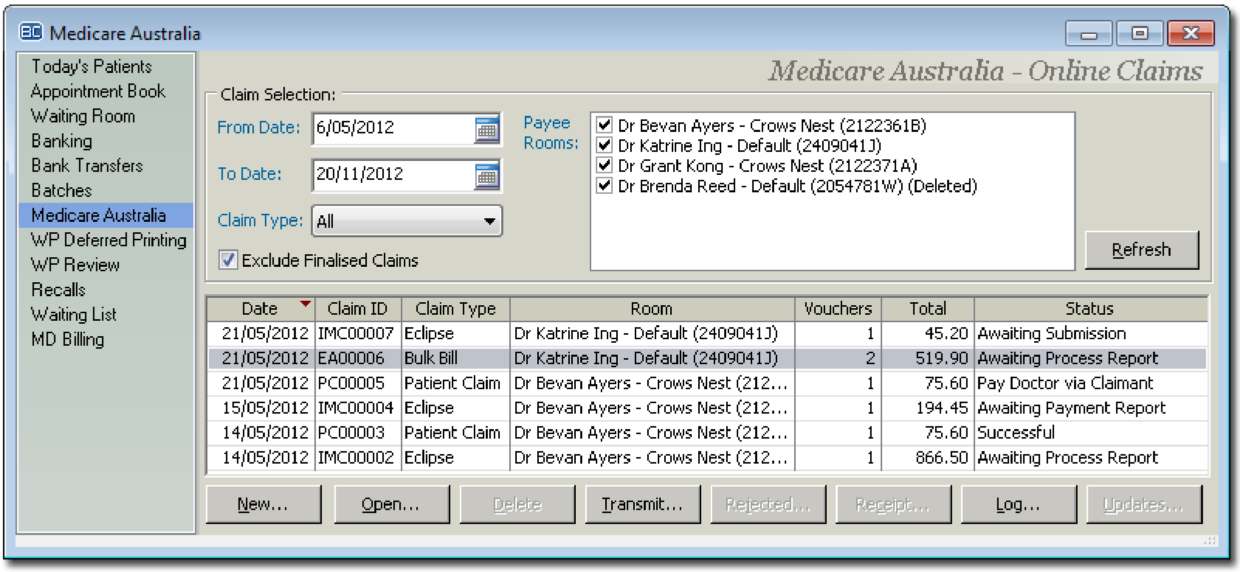
  - Medicare may provide a reference number to be keyed in to the reference panel.
  - The deleted claim will sit in the list.
  - Invoices released from the deleted claim will appear in the New section

Receipting Claim Payments

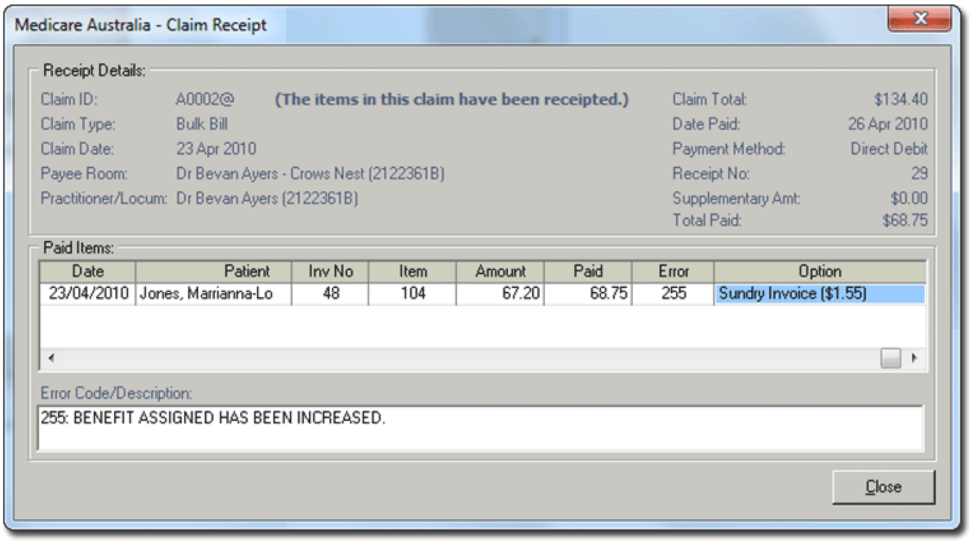
It is important that receipts are processed expediently because the takings are deposited directly into the Practice bank account(s) once the transmission is sent to MedicalDirector Blue Chip.

Delays in processing the receipts can make it difficult to reconcile MedicalDirector Blue Chip revenue reporting against the Bank Statements. Therefore it is recommended that this process be performed daily.

1. From within the **Practice Explorer**, select the **Medicare Australia** menu item.
2. Select a claim whose status is ‘Awaiting Process Report’.
3. Click the **Transmit** button. If the screen below appears, the batch is ready to receipt. Note that claims will usually take 24 hours to process after being sent
4. Click the **Close** button.
5. Click the **Receipt** button when the claim now shows ‘Ready to Receipt’ in the **Status** column.

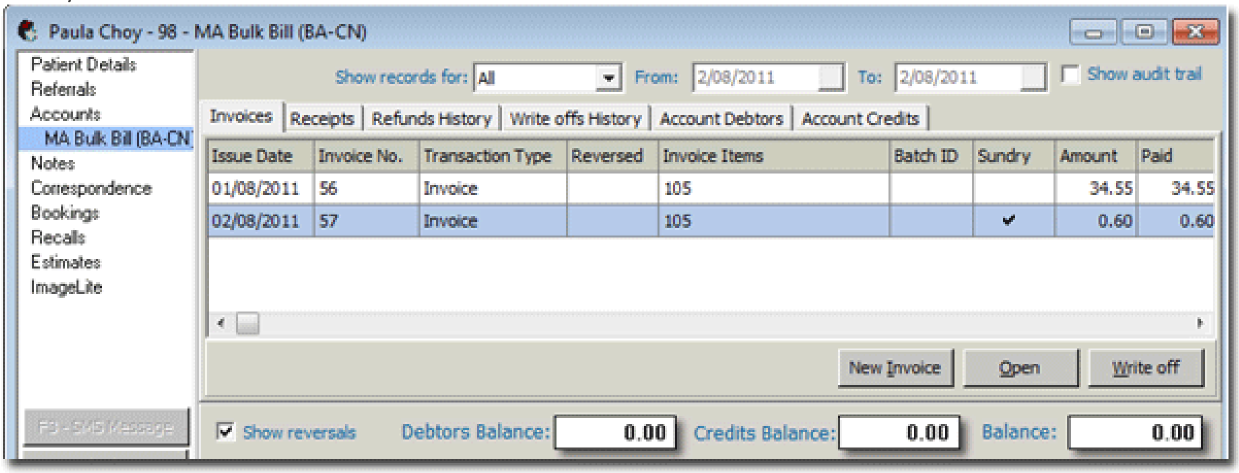


6. The **Medicare Australia Claim Receipt** window appears.

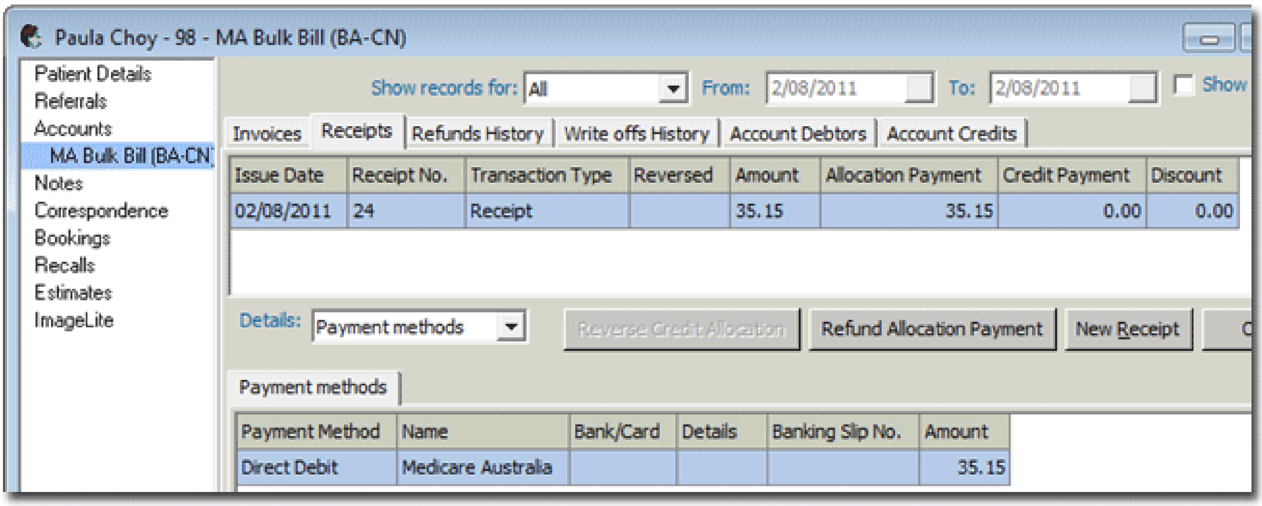


7. Click OK

In the Patient's file, the invoice indicates it has been paid, and the sundry invoice is listed beneath it with a flag in the Sundry column.



The Receipt tab (below) shows the total receipted (invoice + sundry), and the payment method displays that it has been directly debited.



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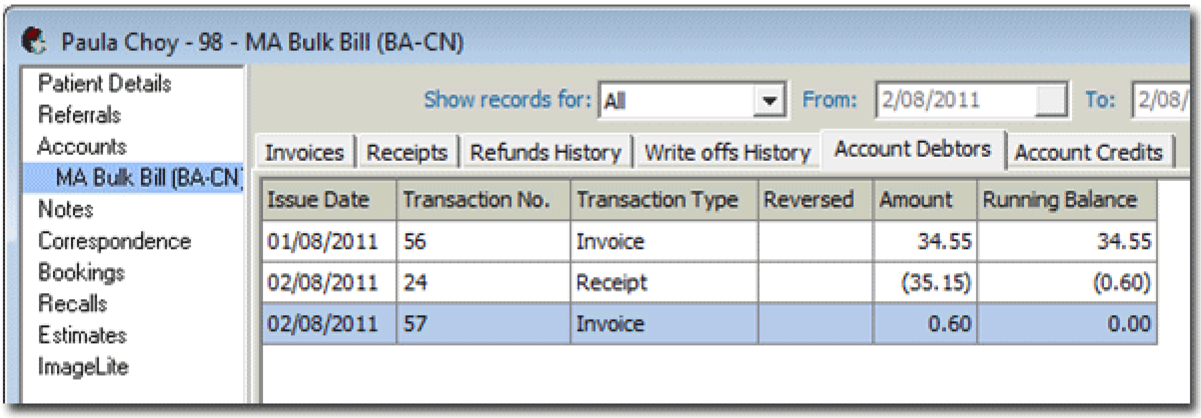
The Account Debtors tab shows the original invoice, then the receipt for the benefit. The sundry invoice is shown on the 3rd line which locks in the overpayment so it can't be used by the patient in future treatment as the money belongs to the practice.



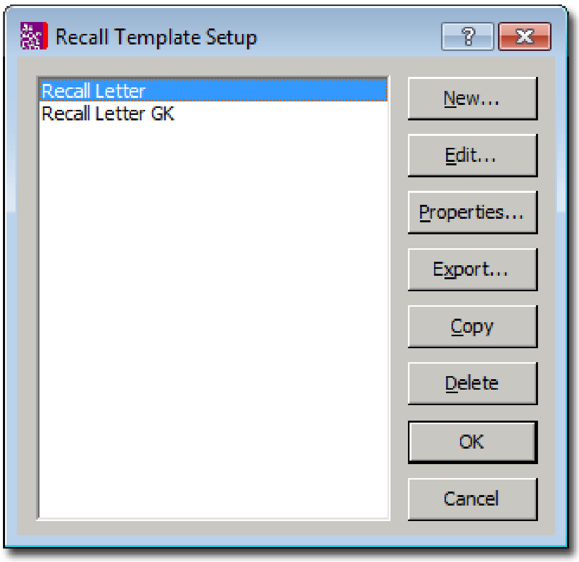
Recalls

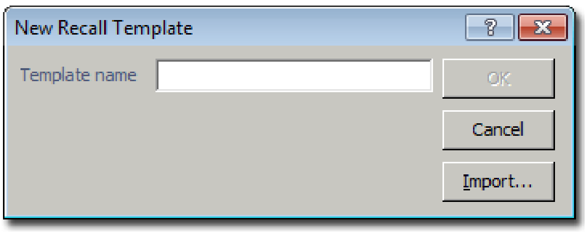
You can create a Recall reminder for a patient either via the Patient Explorer, or via the Practice Explorer.

You must however first create different types of Recalls and associated templates to help identify whether the patients will be contacted via phone or via Mail.

Creating Recall Templates

1. Within MedicalDirector Blue Chip, select **Setup > Templates > Recalls**. The **Recall Template Setup** window appears.
2. Click New... The **New Recall Template** window appears.
3. Name the template (e.g. Pap Test 24 months).
4. Click OK A new blank template for your recall is generated. Add your letterhead, content, and required patient fields that you would like automatically brought into the document (for more information on how to create a template see creating WP templates).
5. Save and close when you have finished editing the template.





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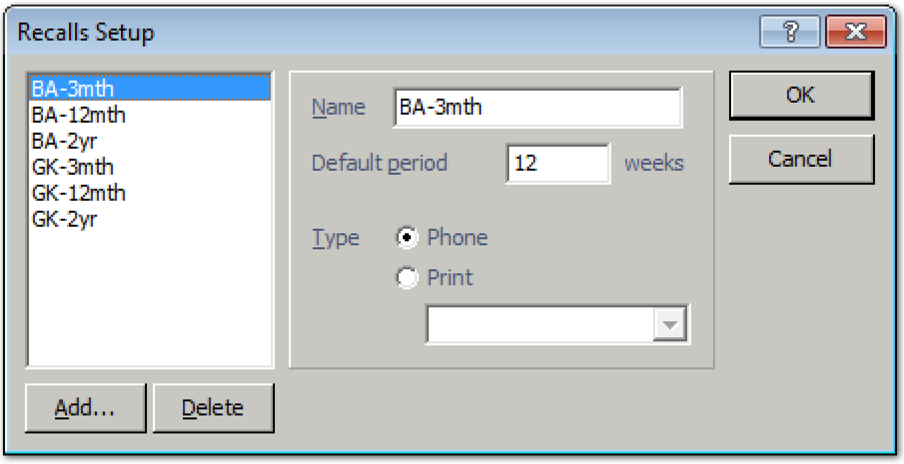
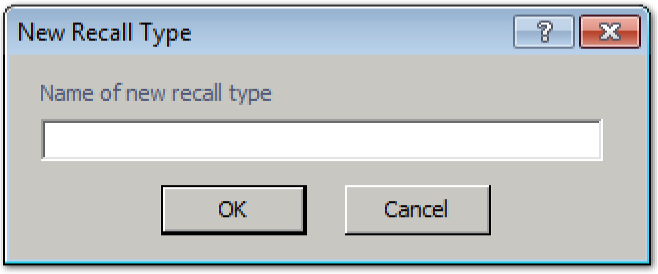
Creating Recall Types

1. Within MedicalDirector Blue Chip, select **Setup > Practice > Recall Types**. The **Recalls Setup** window appears.



2. Click 

The **New Recall Type** window appears.

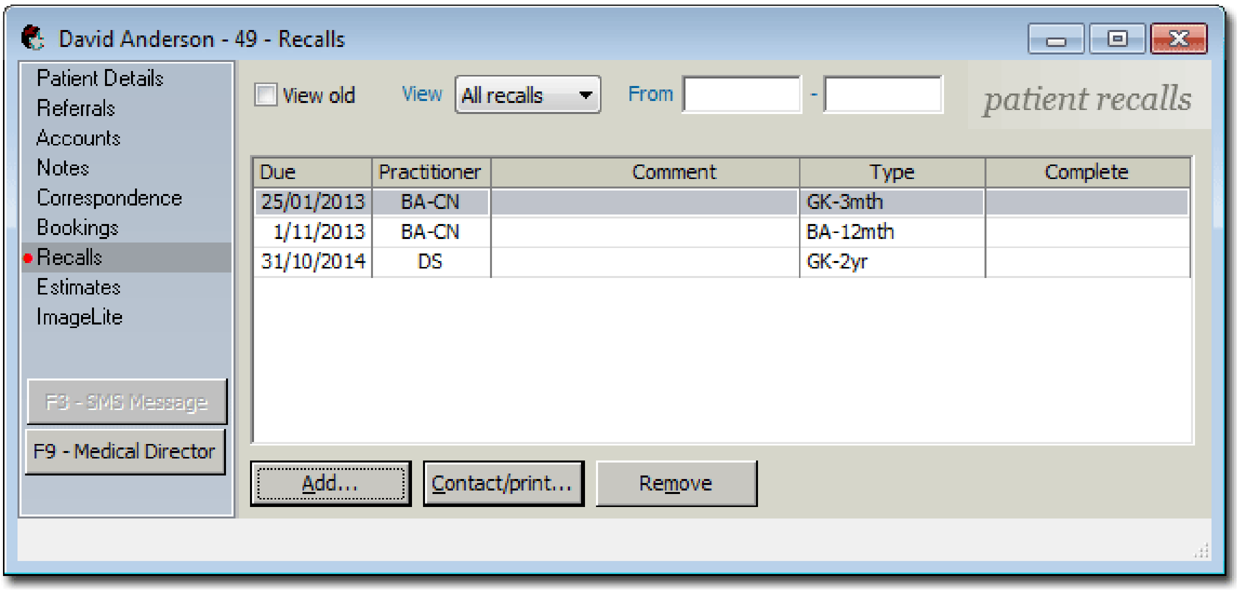


3. Name the recall type.
4. Click 

You will be returned to the Recalls Setup window.
5. Define your recall type by specifying the Default Period (in weeks), and the Type of recall via the two options available (Phone or Print). If you opt to contact the patient via Print (mail), you must make a selection via the associated drop-down.

Assigning a Recall to a Patient via the Patient's Record

1. Open the patient's record. From the Margin Menu, select **Recalls**. The **Patient Recalls** window is displayed.



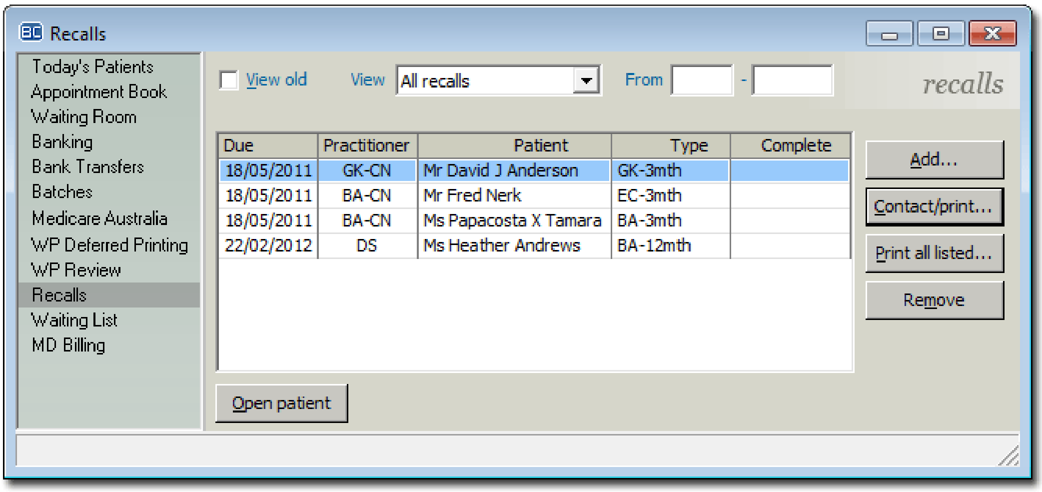
In this window, all current recalls are listed. Old recalls can be viewed by ticking the **View Old** check box.

2. Click Add... to create a recall notification for this patient. Notice that as you have created this recall via the patient's record, the Patient field is pre-populated with the current patient's name, and cannot be altered.

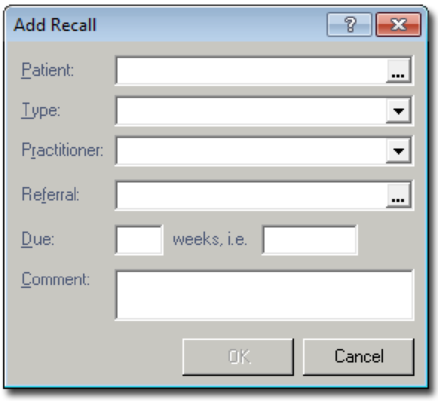
3. Select the **Type** of recall via the associated drop down list menu
4. Select a **Practitioner** via the associated drop down list. This automatically copies the referral details associated with the selected practitioner's accounts and can be used to display within the recall letter.
5. The number of weeks and date will be automatically calculated, as defined by the recall type you selected. These can be modified if necessary, although it is recommended you accept the defaults.
6. Click OK to record the recall. The recall will appear in the patient's record.

Assigning a Recall to a Patient via the Practice Explorer

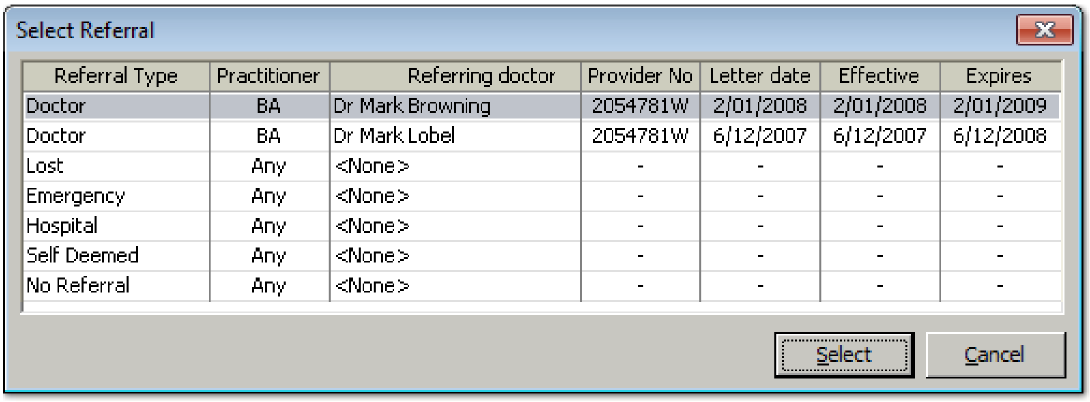
1. Open the **Practice Explorer**.
2. Select the **Recalls** menu. The **Recalls window** appears.



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



4. Enter the patient's name (either type the Surname and press the **Tab** key or click the ... button and select the patient from the search facility).
5. Select the **Type** of recall via the associated drop-down list.
6. Select a **Practitioner** via the associated drop-down list (this is a list of registered practitioners).
7. The **Referral** field will be automatically-populated if it is current. If the patient has multiple referrals, click the ... button to select the correct referral for the recall.

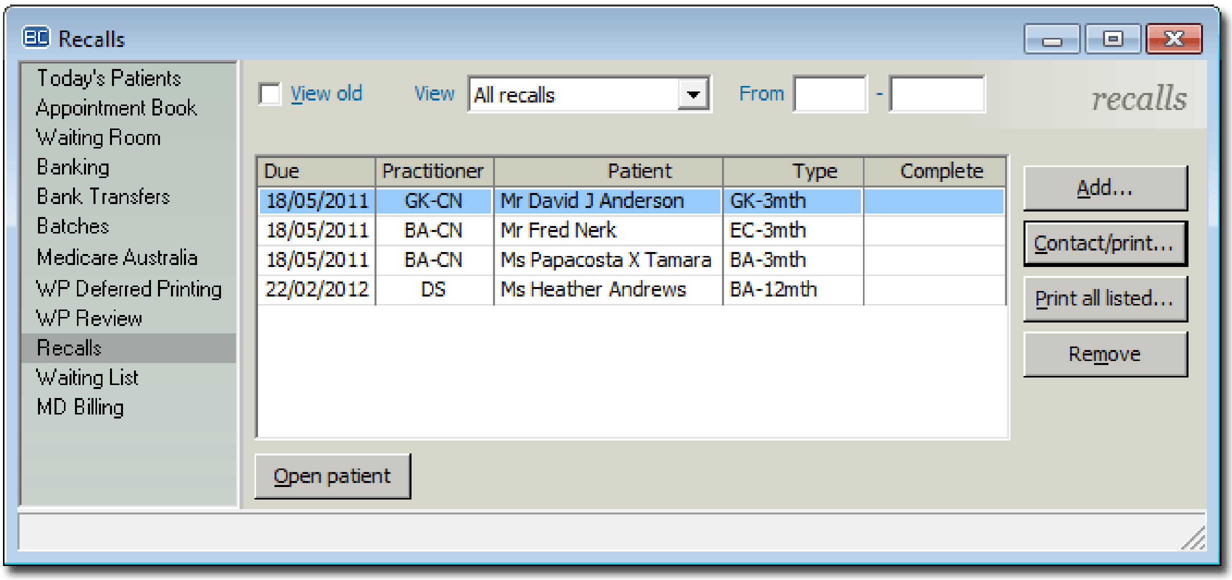


The date of the referral is displayed as with the letter date, effective date and expiry date.

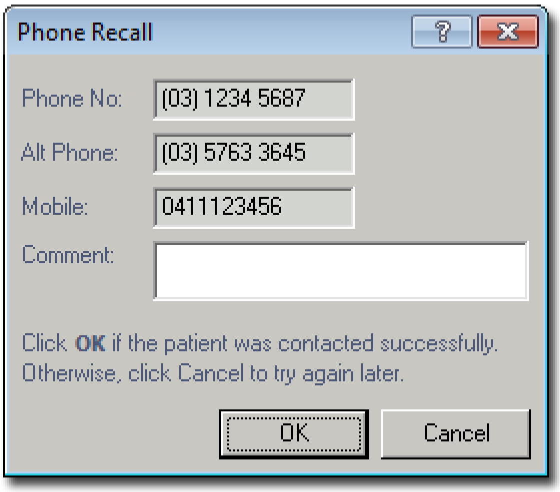
8. The **Due Weeks** and associated **Date** field are linked; changing the number of weeks automatically re-calculates the date field and vice-versa. Add a comment if desired.
9. Click OK The Recall is added to the list within the Practice Explorer. It will also appear in the record of the associated patient.

Enacting a Phone-based Recall Program

1. Open the **Practice Explorer**.
2. Select the **Recalls** menu. The **Recalls window** appears.

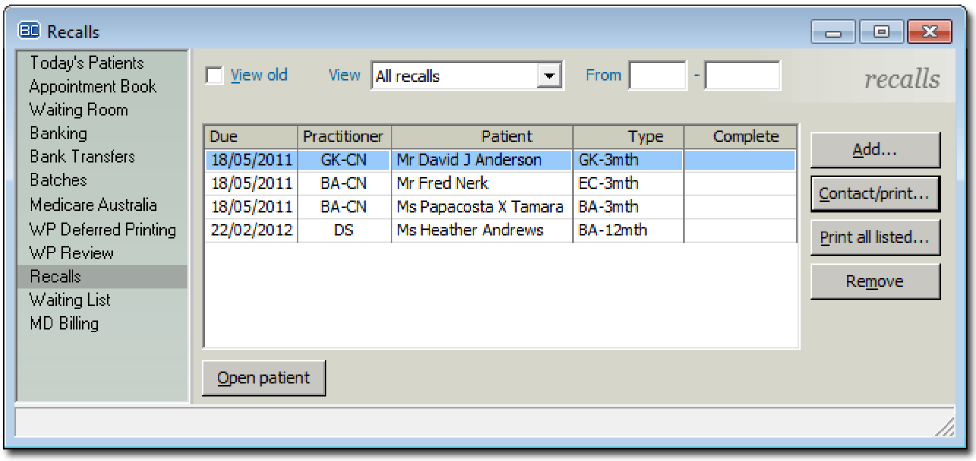


3. Filter the list if necessary to locate and select the recall you wish to enact.
4. Click Contact/print... The **Phone Recall** window appears. Note the advice on this window.
   - If Cancel is clicked, the Recall window appears unaltered.
   - If OK is clicked, the name is removed from the Recall window (having been contacted). The Recall information still appears in the patient's file.



Enacting a Print-based Recall Program

1. Open the **Practice Explorer**.
2. Select the **Recalls** menu. The **Recalls window** appears.



3. Filter the list if necessary to locate and select the recall you wish to enact.
4. Click Contact/print... The **Print Recall** window appears.

5. Enter a comment if desired. The check box indicates that once the letter is printed, it will be sent and delivered therefore the patient is deemed to be contacted.
6. Click OK to continue. You will be prompted to print the recall letter.

   Afterwards, the patient's name is removed from the Recall window in the both the Practice Explorer and Patient Explorer, and details are placed in 'old recalls' in the recalls section of Patient Details.

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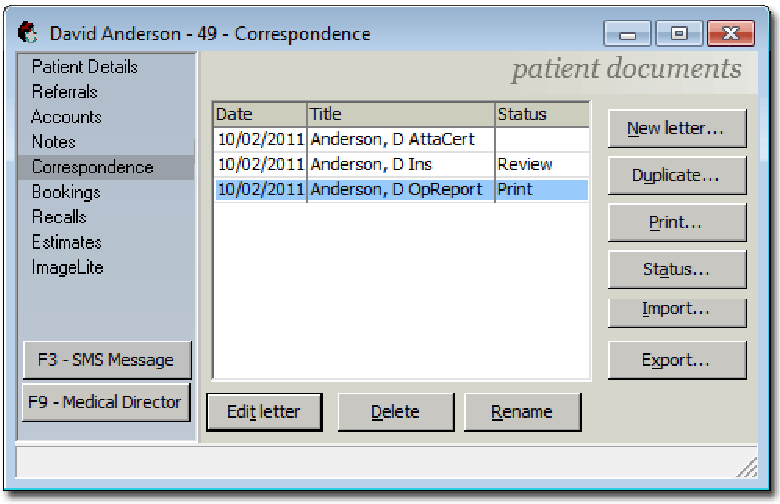
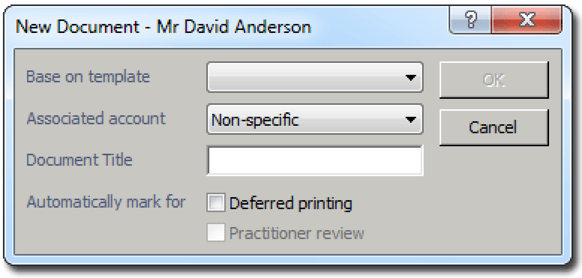
Correspondence

Creating a Medical Report for a Patient

1. Open the patient's record.
2. From the Margin Menu, select **Correspondence**. The **Patient Documents** window is displayed.



3. Click New letter... The **New Document** window appears.



4. Select the template from which the letter will be based via the associated drop-down list. You can create new templates via Setup > Templates > WP.

   Letters can be associated with an account, enabling account-specific information (such as Insurer, Claim Number, Date of Injury etc.) to be imported into the document from within MedicalDirector Blue Chip. It also provides access to the practitioner for electronic review.

   - Type a suitable document title for future reference (this can be automatically inserted within Setup).
   - Tick the **Deferred Printing** check box (optional and allows users to print all of the day’s documents at a later time).
   - Tick the **Practitioner Review** check box (optional and if associated with an account) if the practitioner wishes to review the document before printing.

5. Click OK to continue.

   At this point, Microsoft Word will open and the document content is able to be edited and added to. Any pre-defined fields (previously created within setup) are merged into the document (the referral doctor’s name and address for example).

Saving Letters

Press **Ctrl + S** to save any unsaved work. You can also click the disc icon.

Click the button (at the top right of an open letter) to exit the document. You will be prompted to save your document if you haven't already done so.

Printing Correspondence

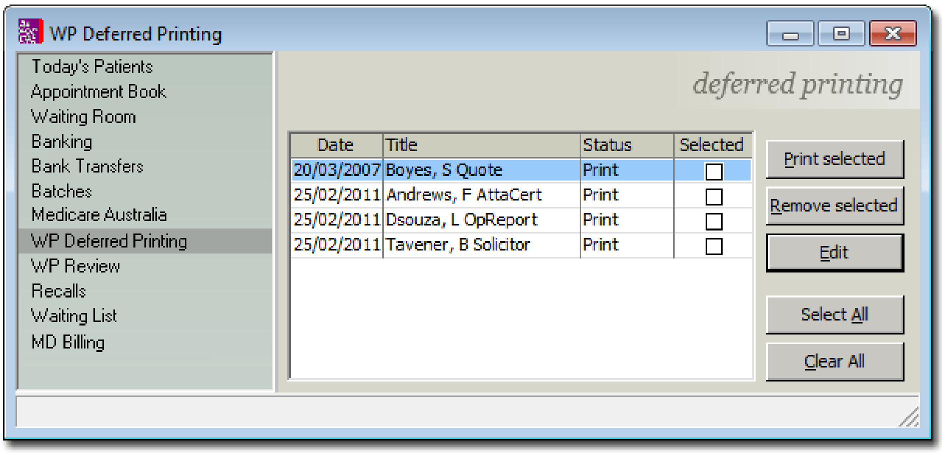
Correspondence is printed via the Print button on the Correspondence window within a patient's record - Microsoft Word printing options are not available.

Printing from within a Patient's Record

1. Open the patient's record.
2. From the Margin Menu, select **Correspondence**. The **Patient Documents** window is displayed.
3. Select the item of correspondence and then click Print

Deferred Printing

1. Open the **Practice Explorer**.
2. Select the **WP Deferred Printing** menu. The **Deferred Printing** window appears.

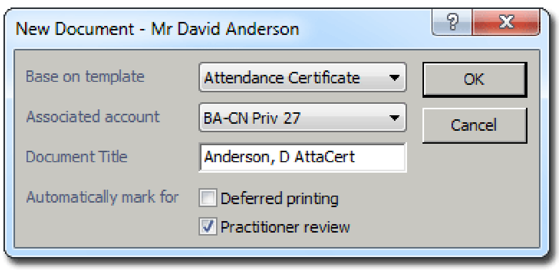


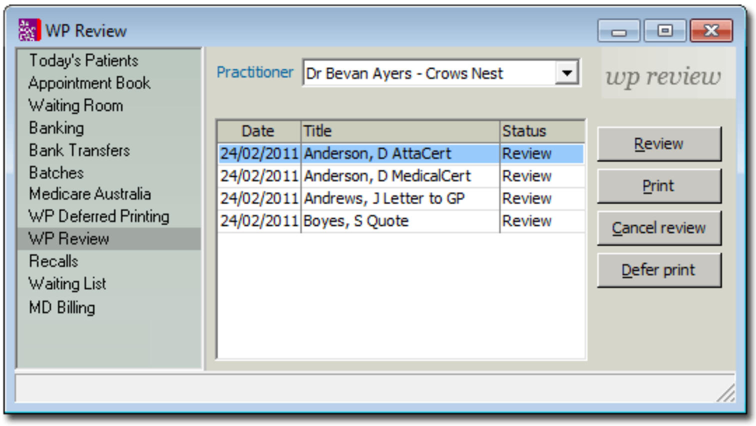
3. Select the items you want to print by ticking their associated **Selected** check box.
4. Click Print selected The Print Report window appears. Print the documents.
5. After printing, reselect the items that were just printed and then click Remove selected to remove the items from the print list. You will be prompted to confirm this action.

WP Review

When you create a new document, you can specify that it must be reviewed. This is done by ticking the **Practitioner Review** check box on the New Document window, as shown below.

This check box becomes available only after you associated the document with a particular account in MedicalDirector Blue Chip (selected via the **Associated Account** drop-down list).





1. Open the **Practice Explorer**.
2. Select the **WP Review** menu. The **WP Review** window appears.
3. Select a practitioner via the associated drop-down menu.
4. Click the **Review** button to open the document in Microsoft Word for editing. Upon closing the document, it will be moved to the WP Deferred Printing window.
   - Click the **Print** button to print immediately (without reviewing)
   - Click the **Cancel** button review to cancel printing the document altogether. The item remains in the patient's correspondence file.
   - Click the **Defer Print** button to move the item to WP Deferred Printing without opening it.

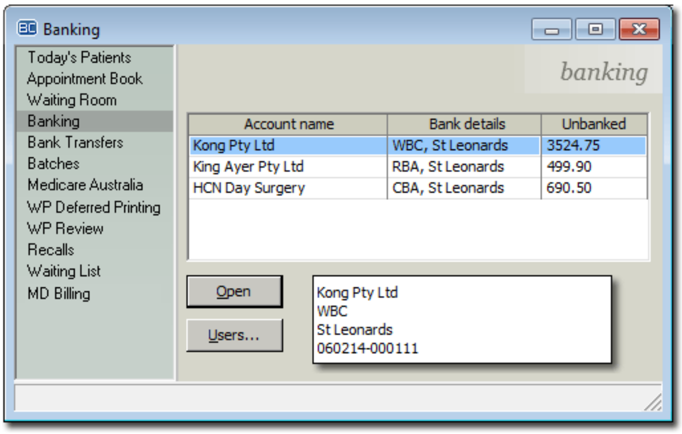
Banking

It is recommended that the Practice settle its banking transactions on a regular basis irrespective of whether the deposit slips are used. Daily Settlements provide users with a means to ensure that correct reconciliations are maintained. It is also recommended that daily takings are reconciled against your Day Sheet to ensure that your banking transactions are correct. Settling your banking on a regular basis will help prevent small errors escalating.

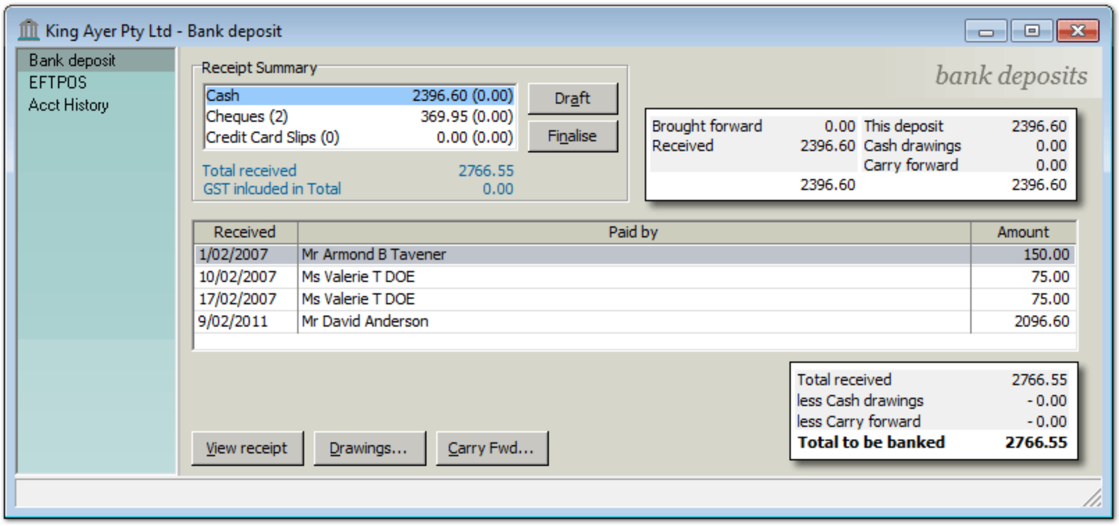
Your EFTPOS machine, whether TYRO-based (EFTPOS Auto) or bank-based (EFTPOS Manual), will provide a daily tally of processed transactions. It is far easier for a Practice to reconcile on a daily basis when multiple staff are involved in the data entry, than to wait until the end of the week. The printing of settlement slips within MedicalDirector Blue Chip is not necessary. However, it is recommended that you settle the EFTPOS section of MedicalDirector Blue Chip banking.

Cash and Cheque (Physical Banking)

1. Open the **Practice Explorer**. Select the **Banking** menu. The **WP Review** window appears.



2. Select the account you wish to perform banking on, and then click Open You will be presented with the **Bank Deposits** window.



The **Amount** column represents the physical takings (cash and cheques) that will be deposited at the bank. This defaults to Cash and shows the cash transactions. By selecting Cheques in the Receipt Summary section you can display Cheque transactions.

3. Click Draft to print a draft deposit slip. When satisfied, click Finalise to print the banking deposit slip and to reset the daily balances to zero

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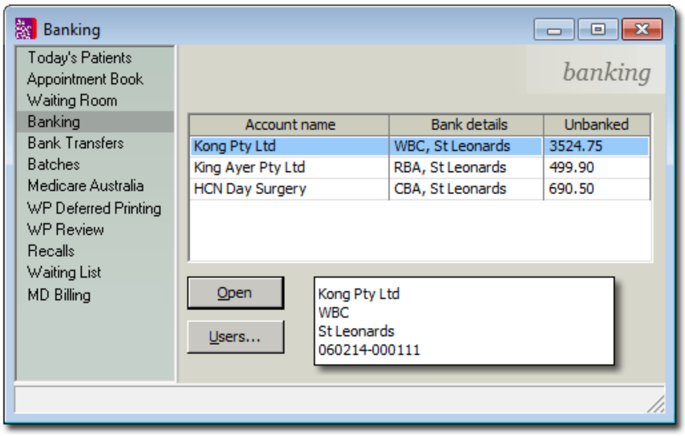
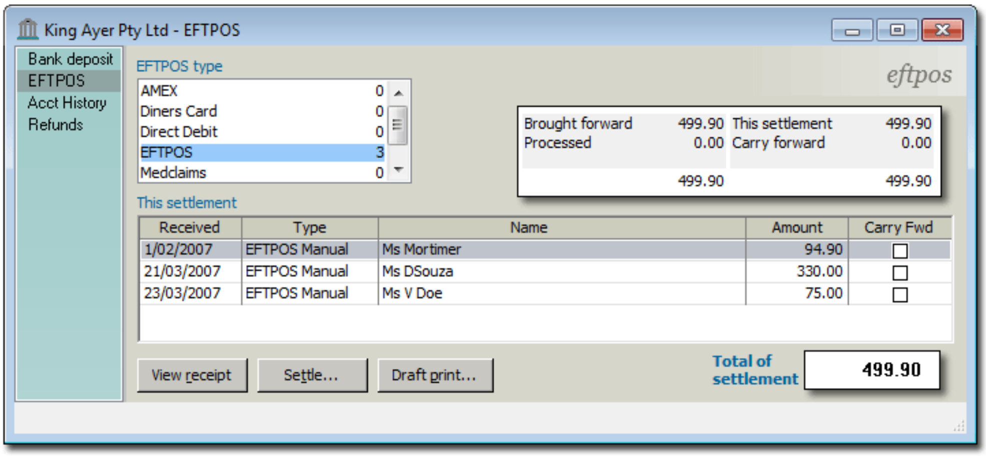
EFTPOS

1. Open the **Practice Explorer**.
2. Select the **Banking** menu. The **WP Review** window appears.

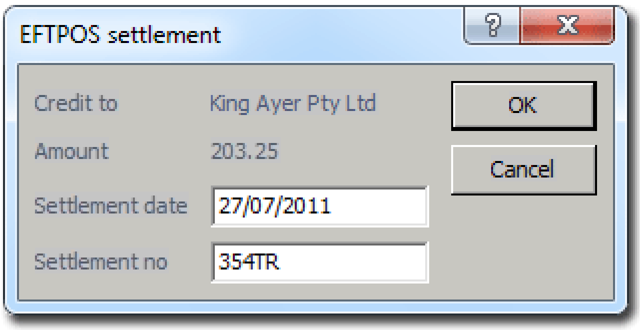


3. Select the account you wish to perform banking on, and then click Open You will be presented with the **Bank Deposits** window.
4. Select the **EFTPOS** menu. The EFTPOS window appears.



All the EFTPOS transactions are listed in the settlement. These include EFTPOS Auto if you have a TYRO machine for Integrated EFTPOS.

5. Click Settle... to settle the day's transaction. The **EFTPOS Settlement** window appears.



6. Enter the settlement number as printed on the EFTPOS terminal settlement summary (not all machines have them). The EFTPOS settlement summary will be printed to a nominated printing destination.

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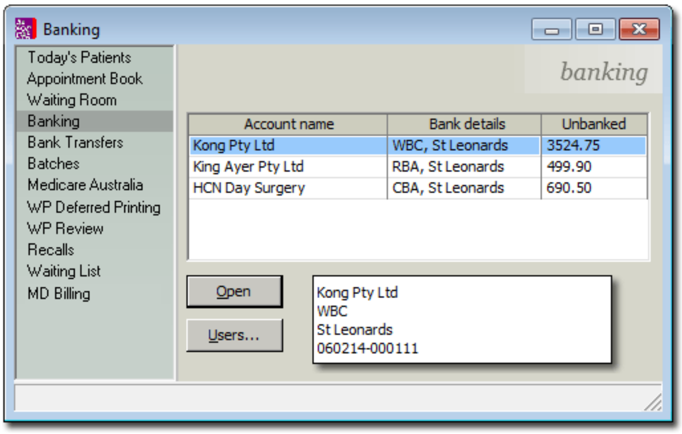
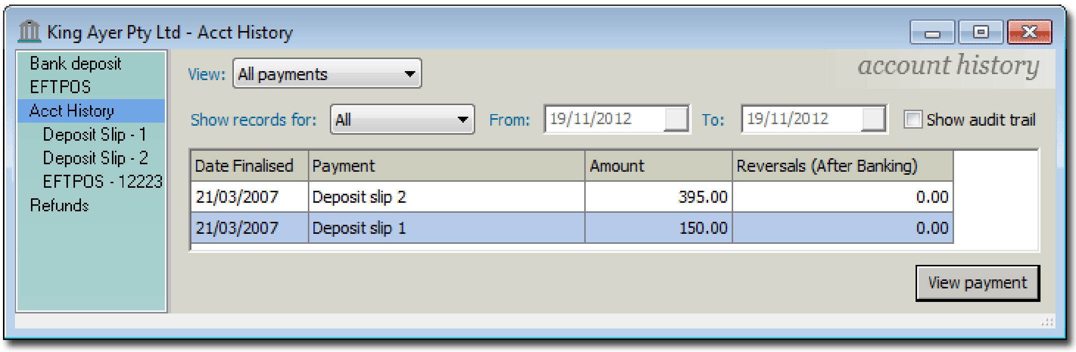
Account History

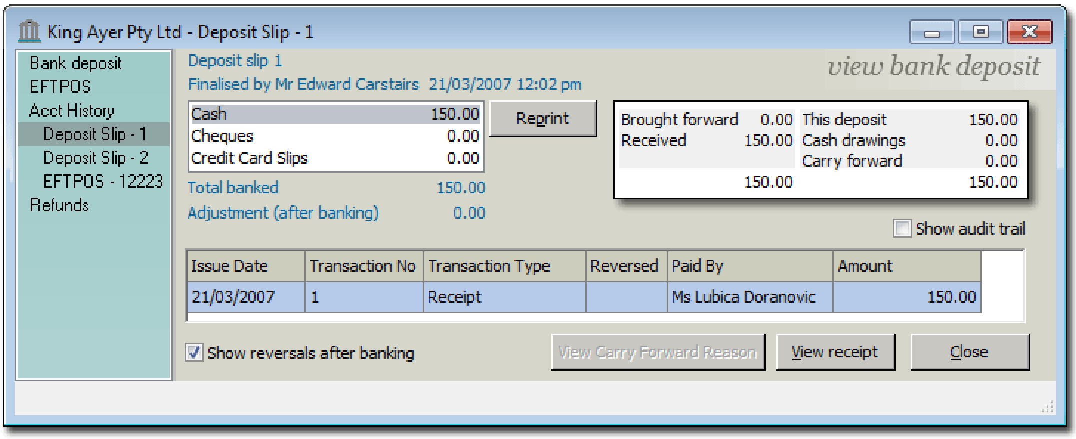
1. Open the **Practice Explorer**.
2. Select the **Banking** menu. The **Banking** window appears.



3. Select the account you wish to open, and click Open The **Bank Deposits** window appears.
4. Select the **Acct History** menu. The **Account History** window appears, displaying all bank deposits and EFTPOS settlements recorded.

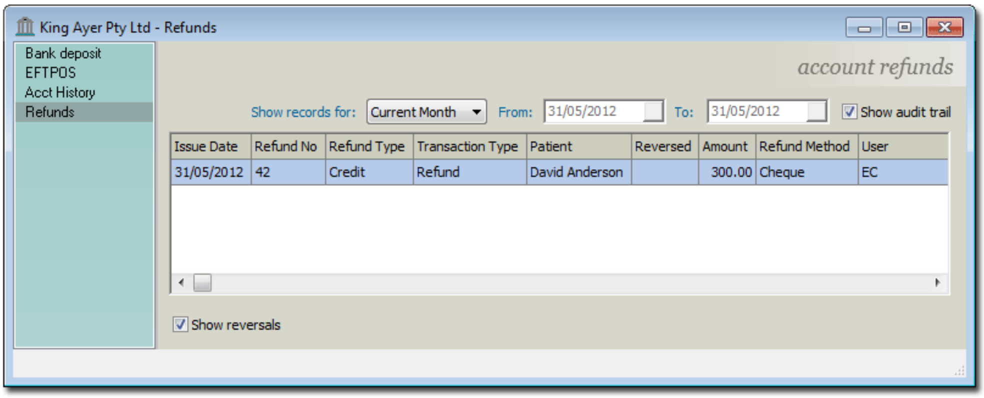


5. Select the required entry, and click View payment



Refunds

Because a refund is performed after banking has been finalised, it does not change an issued invoice or receipt, nor does it change a day's takings. A refund is usually drawn from the Practice's bank account, so this section has been included in the Banking Module. The Refund screen displays all refunds given in the current month by default. Not shown in the screen capture is the reason for the refund, and the date and time.



End of Day / Session Process

Medicare electronic claims should be transmitted and checked daily to ensure that payments are processed promptly for reconciliation. Medicare processes transactions seven days a week, therefore it is possible that transmissions on a Friday may be paid by Monday. Not processing these transactions on a daily basis could make bank statement reconciliation more difficult.

No-shows or Did Not Attend (DNA) type letters should also be considered in the End-of-Day process to ensure the patients and referring doctors are kept informed, and to maintain the Patient/Practice legal requirements.

The complete list of MedicalDirector Blue Chip reports (except Banking) is located by clicking on the printer icon found in the MedicalDirector Blue Chip toolbar.

MedicalDirector recommends the following reports to be printed at the end of each day to ensure that any discrepancies can easily be identified and rectified.

Day's Appointment List

The Appointment List reflects who is expected to attend the practice today. Either use the existing sheet printed at the beginning of the session (tally sheet) or print a fresh copy. Ensure that this new list reflects any 'walk-ins' or emergency appointments.

Day Sheet

This is a transactional report that can be printed for (a) specific practitioner(s), and displays all transactions processed on the day. The report can display transactions based upon either entry date or issue date.

Surgical-type invoices with an issue date in the past will appear on a Day Sheet report based on the Issue date or the Entry date the invoice was keyed in.

The Day Sheet will reflect the following;

- Invoices created and issued or deferred or adjusted.
- Monies received for banking.
- Patient transactions, adjustments, deletions (section 2)
- Appointments made & cancelled (Section 3)
- Bank Deposit Slip: (See banking in this document)

Understanding the Day Sheet

Invoices created – Section 1. Check that all patients who appear on the appointment list or tally sheet have had an invoice created. The invoices are itemised and differentiated by their invoice number. The service date is included on the report enabling easy identification of 'catch up' invoices.

Invoices

Account Class	Issue Date	Patient Name	Invoice No	Transaction Type	Item No	Service Date	Amount (incl GST)	GST	Audit User Initials	Audit Date	Audit Reason
Private	27/07/2011	Anderson, David, Mr	57	Invoice	45867	27/07/2011	295.20	0.00	EC	27/07/2011	
imc	27/07/2011	Andrews, Fred, Mr	59	Invoice	32078	20/05/2011	209.30	0.00	EC	27/07/2011	
Private	27/07/2011	Andrews, Heather, Ms	54	Invoice	30061	27/07/2011	26.65	0.00	EC	27/07/2011	
Private	27/07/2011	Andrews, John, Mr	55	Invoice	104	27/07/2011	150.00	0.00	EC	27/07/2011	
Private	27/07/2011	Andrews, John, Mr	55	Invoice (Rev)	104	27/07/2011	(150.00)	0.00	EC	27/07/2011	Reversing Invoice
Private	27/07/2011	Andrews, John, Mr	58	Invoice (Adj)	105	27/07/2011	75.00	0.00	EC	27/07/2011	Replacing Invoice
Private	27/07/2011	MacDonald, Corrine, Ms	61	Invoice	30061	27/07/2011	26.65	0.00	EC	27/07/2011	
Private	27/07/2011	MacDonald, Corrine, Ms	61	Invoice	46513	27/07/2011	64.10	0.00	EC	27/07/2011	
Private	27/07/2011	Watts, Gregory, Mr	56	Invoice	105	27/07/2011	75.00	0.00	EC	27/07/2011	
Private	27/07/2011	Watts, Gregory, Mr	62	Invoice	32500	27/07/2011	124.60	0.00	EC	27/07/2011	
			Totals	Invoices			971.50	0.00			
				Invoices (Rev)			(150.00)	0.00			
				Invoices (Adj)			75.00	0.00			
							896.50	0.00			

Deferred Invoices created or updated – Section 2. This section of the Day sheet lists the invoices that have been deferred or updated and deferred again.

Receipts and Credit Allocations – Section 3. Patients are listed alphabetically and the invoices and allocations are listed on the same line. The receipted amount is listed first, then invoices total.

Account Class	Issue Date	Name	Receipt No	Transaction Type	Receipt Amount (incl GST)	Credit	Invoices	Disc	Audit User Initials	Audit Date	Audit Reason
Private	27/07/2011	Andrews, Heather, Ms	21	Receipt	176.65	0.00	176.65	0.00	EC	27/07/2011	
imc	27/07/2011	Andrews, Heather, Ms	22	Receipt	402.30	0.00	402.30	0.00	EC	27/07/2011	
Private	27/07/2011	Andrews, Jennifer S, Ms	23	Receipt	653.25	0.00	653.25	0.00	EC	27/07/2011	
Private	27/07/2011	Andrews, John, Mr	25	Receipt	150.00	0.00	150.00	0.00	EC	27/07/2011	
Private	27/07/2011	Andrews, John, Mr	25	Receipt (rev)	(150.00)	0.00	(150.00)	0.00	EC	27/07/2011	Allocated invoice svc item
Private	27/07/2011	Watts, Gregory, Mr	26	Receipt	75.00	0.00	75.00	0.00	EC	27/07/2011	
Private	27/07/2011	Anderson, David, Mr	27	Receipt	295.20	0.00	295.20	0.00	EC	27/07/2011	
Private	27/07/2011	Andrews, John, Mr	25	Receipt	150.00	150.00	0.00	0.00	EC	27/07/2011	
Private	27/07/2011	Andrews, John, Mr	25	Receipt (rev)	(150.00)	(150.00)	0.00	0.00	EC	27/07/2011	wrong svc item
Private	27/07/2011	Andrews, John, Mr	28	Receipt (adj)	75.00	0.00	75.00	0.00	EC	27/07/2011	ReplacingReceip svc item
Private	27/07/2011	MacDonald, Corrine, Ms	29	Receipt	90.75	0.00	90.75	0.00	EC	27/07/2011	
			Totals	Receipt	1,993.15	150.00	1,843.15	0.00			
				Credit alloc	N/A	0.00	0.00	0.00			
				Receipt (Rev)	(300.00)	(150.00)	(150.00)	0.00			
				Receipt (Adj)	75.00	0.00	75.00	0.00			
					1,768.15	0.00	1,768.15	0.00			

Receipts by Payment Method – Section 4

Receipts are listed in number order and itemised. The total in this section should equal the physical count of cash, cheques and EFTPOS takings for the day. If the totals don't balance, refer back to Section 3 to check for discrepancies. Take special note of adjustments and check that the final invoice/receipt is the correct outcome.

ayment Method

Payment Method	Issue Date	Receipt No	Transaction Type	Drawer / Payer	Bank / Card	Amount	User Initials	Entry Date	Audit Reason
Cash	27/07/2011	21	Receipt	Ms Heather Andrews		150.00	EC	27/07/2011	
Cheque	27/07/2011	21	Receipt	Ms Heather Andrews	WBC	26.65	EC	27/07/2011	
	27/07/2011	22	Receipt	Medibank Private	CBA	402.30	EC	27/07/2011	
Cash	27/07/2011	23	Receipt	Ms Jennifer S Andrews		450.00	EC	27/07/2011	
EFTPOS Manual	27/07/2011	23	Receipt	J Andrews	Mastercard	203.25	EC	27/07/2011	
Cash	27/07/2011	25	Receipt	Mr John Andrews		150.00	EC	27/07/2011	
	27/07/2011	25	Receipt (rev)	Mr John Andrews		(150.00)	EC	27/07/2011	Allocated invoice adj svc item
	27/07/2011	26	Receipt	Mr Gregory Watts		75.00	EC	27/07/2011	
EFTPOS Manual	27/07/2011	27	Receipt	d aNDERSON	VISA	295.20	EC	27/07/2011	
Cash	27/07/2011	25	Receipt	Mr John Andrews		150.00	EC	27/07/2011	
	27/07/2011	25	Receipt (rev)	Mr John Andrews		(150.00)	EC	27/07/2011	wrong svc item
	27/07/2011	28	Receipt (adj)	Mr John Andrews		75.00	EC	27/07/2011	ReplacingReceipt N svc item
EFTPOS Manual	27/07/2011	29	Receipt	Corrine Macdonald	Mastercard	90.75	EC	27/07/2011	
					Total:	1,768.15			

Write offs & Refunds – Section 5

These 2 areas list the write offs and refunds performed in the day. A write off may correspond to an invoice created that day. A refund will almost certainly correspond to a transaction from a previous Banking period.

Write-offs

Account Class	Issue Date	Name	Write off No	Transaction Type	Write-off Type	Write-off Amount	Invoice No	Service Item	Alloc amount	User Initials	Entry Date	Audit Reason
Private	27/07/2011	Watts, Gregory, Mr	30	Write-off	Bad Debt	124.60	62	32500	124.60	EC	27/07/2011	EC: Leg amputated
				Totals					124.60			

Class	Issue Date	Transaction Type	Refund No	Refund Type	Name	Refund Amount	Invoice/ Receipt No	Service Item	Alloc amount	User Initials	Entry Date	Audit Reason
Private	27/07/2011	Refund	24	Allocation	Andrews, Jennifer S, Ms	113.90	43	51300	94.00	EC	27/07/2011	Procedure not succe
Private	27/07/2011	Refund	24	Allocation	Andrews, Jennifer S, Ms	113.90	43	32075	19.90	EC	27/07/2011	Procedure not succe
			Totals	Credit Allocation					0.00 113.90			

If any errors have been made, correct them before banking has been settled. If required, print off another day sheet after corrections have been made to ensure all figures add up; then settle the banking.

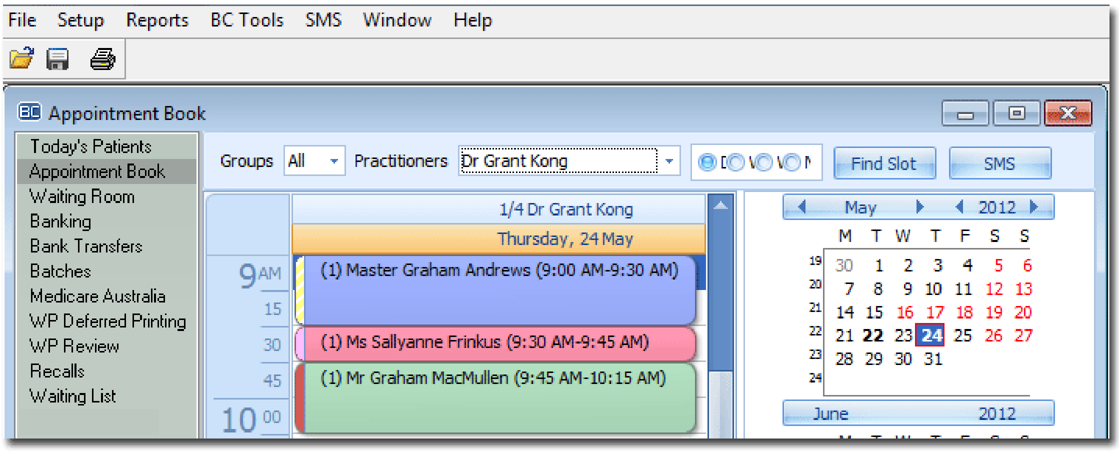
The day's appointments – Section 6

The last table on the day sheet lists the appointments made during the day (regardless of when the appointment is actually for) and lists any cancellations received. There are additional reports available under BC Reporter that can display statistical information on appointments not found in the reporting module.

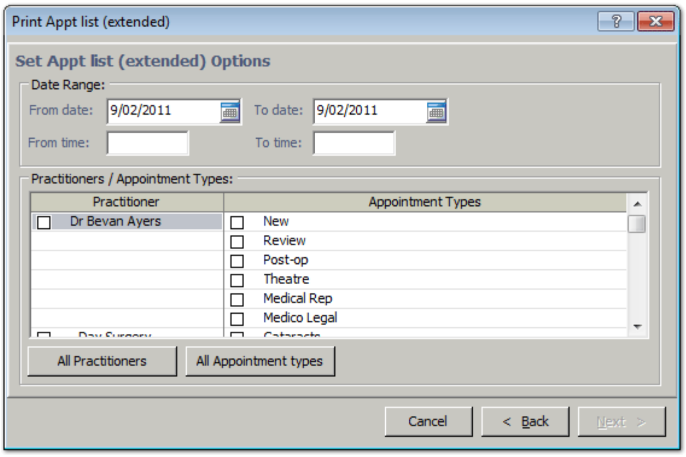
Printing Appointments

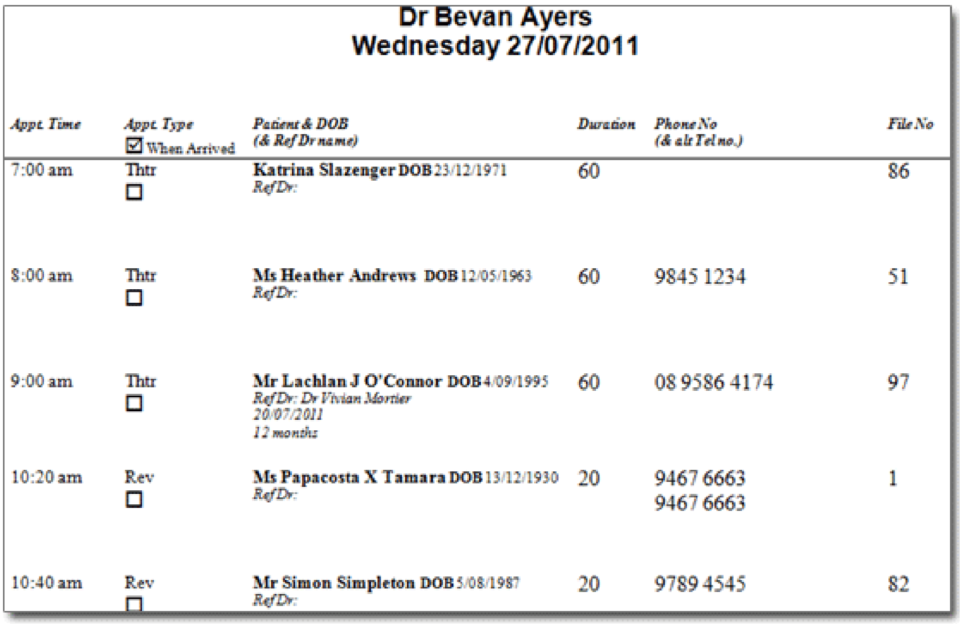
Prior to ending the day, the next session's appointment list can be printed.

1. Select the required day using the calendar control on the right-hand side of the Appointment Book.



2. Click the printer icon to call the **Print Report** window.
3. Select the type of Appointment list for the required day.
4. Select the practitioner and appointment types (or choose select all). Set the date to the required date (be sure to set the end date first-see below for the preferred format).
5. Set the printer destination and conduct the print. The printout of the Appointment List can be used to remind patients of their appointment.





Dr Bevan Ayers
Wednesday 27/07/2011

Appt. Time	Appt. Type ☑ When Arrived	Patient & DOB (& Ref Dr name)	Duration	Phone No (& alt Tel no.)	File No
7:00 am	Thtr ☐	**Katrina Slazenger DOB** 23/12/1971 RefDr:	60		86
8:00 am	Thtr ☐	**Ms Heather Andrews DOB** 12/05/1963 RefDr:	60	9845 1234	51
9:00 am	Thtr ☐	**Mr Lachlan J O'Connor DOB** 4/09/1995 RefDr: Dr Vivian Mortier 20/07/2011 12 months	60	08 9586 4174	97
10:20 am	Rev ☐	**Ms Papacosta X Tamara DOB** 13/12/1930 RefDr:	20	9467 6663 9467 6663	1
10:40 am	Rev ☐	**Mr Simon Simpleton DOB** 5/08/1987 RefDr:	20	9789 4545	82