

# MedicalDirector Blue Chip User Guide



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## **Patient Records**

Opening a Patient's Record

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

MedicalDirector Blue				
<u>F</u> ile <u>S</u> etup <u>R</u> eports	<u>B</u> C Tools	S <u>M</u> S	<u>W</u> indow	<u>H</u> elp
2 🔒 🍯				

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

Open			? <mark>X</mark>
Search for	List	<u>B</u> y	
	Patients	Name 🔻	<u>O</u> pen
Name	Suburb	*	Cancel
Anderson, David	MELBOURNE VIC		
Anderson, Penny	MELBOURNE VIC		
Andrews, Anna	DACEYVILLE NSW		<u>N</u> ew
Andrews, Fred	ST KILDA VIC		
Andrews, Graham	DACEYVILLE NSW		
Andrews, Heather	DACEYVILLE NSW		Sp <u>e</u> cial »
Andrews, Jennifer S	DACEYVILLE NSW		
Andrews, John	DACEYVILLE NSW		Onen Dick List
Andrews Julie	PARKVILLE VIC	•	Open Pick List
Display Only Preferred	Mr David Anderson	File 49	\$ 0.00
✓ Include Inactive	61 Wallace Street	Ph 9456 3245	,
Include Deceased	MELBOURNE VIC 3000		4/11/1955
Inactive			
Deceased			
119 files found.			

- 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

0	pen			? x
	Search for	List	<u>B</u> y	
		Patients 👻	Name 🔻	<u>O</u> pen
	Name	Suburb	Name File No	Cancel
	Anderson, David	MELBOURNE VIC	Medicare No	
	Anderson, Penny	MELBOURNE VIC	Date Of Birth	
L	Andrews, Anna	DACEYVILLE NSW		New

File Numbers	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.				
Medicare Number	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. <i>This method is useful when you receive a Medicare cheque from someone who has torn off the</i> <i>detailed information at the top.</i>				
Date of Birth	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.				
Invoice/Receipt	Press     + to call the Locate dialog box.     Locate     Search for     Find     Cancel     Quotation     Account Ref     Number     Number     Number     Select the required option.     . Select the required option.     . Type the reference number.				



## Creating a New Patient Record

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

Open			? <mark>×</mark>
Search for	List	By	
	Patients	<ul> <li>Name</li> </ul>	▼ <u>O</u> pen
Name	Suburb		Cancel
Anderson, David	MELBOURNE VIC		
Anderson, Penny	MELBOURNE VIC		
Andrews, Anna	DACEYVILLE NSW		<u>N</u> ew
Andrews, Fred	ST KILDA VIC		
Andrews, Graham	DACEYVILLE NSW		
Andrews, Heather	DACEYVILLE NSW		Sp <u>e</u> cial »
Andrews, Jennifer S	DACEYVILLE NSW		
Andrews, John	DACEYVILLE NSW		- Open Pick List
Andrews Julie	PARKVILLE VIC		openniekcistaa
Display Only Preferred	Mr David Anderson	File 49	\$0.00
✓ Include Inactive	61 Wallace Street	Ph 9456 3245	<b>,</b>
✓ Include Deceased	MELBOURNE VIC 3000		4/11/1955
Inactive			
Deceased			
119 files found.			

2. Click <u>New...</u> The **New Patient** window appears.

New Patient				? ×
<u>T</u> itle	<u>G</u> iven	<u>I</u> nitial <u>S</u> urname		OK
Date of <u>b</u> irth	Phone	<u>A</u> lt Phone	Mobile Phone	Cancel
				Copy <u>f</u> rom

- 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 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.



🐮 David J Anderso	on - 49 - Patient [	Details						
Patient Details Referrals	<u>T</u> itle Mr	Given David	Initial	Surname Anderson	Status Active	·	patier	nt details
Accounts HICO Bulk Bill (( DS MBP (DS)	Gender Male	Salutation			Date of <u>b</u> irth 4/11/1955	Age 56 ye	ars	
Private (BA-CN) Notes	Residential Addre	ss Postal Address			Deceased	Decea	sed Date	
Correspondence Bookings Becalls	61 Wallace Stree	et			File Number			
Estimates ImageLite	MELBOURNE		/	/IC 3000	Accounts	Class	Acct Def	new
	Default addr	ess (Address Line 1 and	d Suburb	are required)	BA-CN P	riv	27	2877.85

## The Patient Explorer

#### 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.

Select Suburb				? <b>- X-</b> )
Search for:				
Suburb	State	Postcode		ОК
AARONS PASS	NSW	2850		
ABBEYARD	VIC	3737		Cancel
ABBEYWOOD	QLD	4613		
ABBOTSBURY	NSW	2176		<u>N</u> ew
ABBOTSFORD	NSW	2046		
ABBOTSFORD	QLD	4670		<u>E</u> dit
ABBOTSFORD	VIC	3067		
ABECKETT STREET	VIC	8006		Delete
ABERCORN	QLD	4627		
ABERCROMBIE	NSW	2795	Ŧ	Import
Show suburbs from a	ll states			
12,099 postcodes listed				



#### Adding a New Suburb/Postcode

If you are certain that a suburb is not already in the database, you can add it by clicking <u>New...</u> 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 <u>Your</u> 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.



Note that

#### 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.

Smithersd, Dottie H	MANDOGALUP WA			Open Pick List
Display Only Preferred	Master Fred Smith 2 Kennedy Road	File Ph	74 9123 4567	\$ 0.00
Include Deceased	DACEYVILLE NSW 2032	Alt	9345 6789	23/08/1998
Inactive	Patient Requires Interpreter			
Deceased				

#### 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.

<ul><li>Medicare</li><li>Veteran</li></ul>	No QX901490	White Card
--	----------------	------------

#### **Online Patient Verification (OPV)**

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

Last verified using Medicare Australia/ DVA: Not yet verified.

Verify patient before invoicing. Verify with Medicare Australia/DVA...



#### **File Numbers**

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

- $\circ$   $\,$  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

Date of <u>b</u> irth	Age
23/02/1923	89 years
Deceased	Deceased Date
91	

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 easilyaccessible 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.

🎨 David J Anderson	- 49 - Notes	
Patient Details		
Referrals		patient notes
Accounts		
Notes     Correspondence     Bookings     Recalls     Estimates     ImageLite     F3 - SMS Message     E0     Madical Director	David will be changing his address so	on
	Print Add timestamp	
		11.



## Referrals

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

 $\circ$   $\;$  The 'Referring Doctor' section within the Patient Details window.

Referring <u>D</u> octor	
Dr M Lobel (for BA, 2 current) Expires 02/2013 (24 month)	•

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

🖲 David J Anderson -	49 - Referral	ls							• <b>X</b>
Patient Details Referrals	patient referrals								
Accounts	V Hide Inad	ctive Referral	5						
Notes	Practitioner	Effective	Referring doctor	Prov No	Letter date	Period	Expires	Current	Active
Correspondence	BA	24/02/2011	Dr Julie Kingsford	2054781W	15/02/2011	12	23/02/2012	•	
Bookings	Any	24/02/2011	Dr Vincent Harrison	2054781W	24/01/2010	2	23/04/2011	•	
Recalls	BA	11/02/2011	Dr Mark Lobel	2054781W	11/02/2011	24	10/02/2013	•	
Estimates	BA	11/02/2011	Dr Vivian Mortier	2121331W	1/01/2011	12	10/02/2012	•	✓
ImageLite									
F3 - SMS Message F9 - Medical Director	Dr Julie Kingsford         Ph 6252 3656           665 Monash Street         205478 1W           New         Delete         Deactivate								

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 \_\_\_\_\_\_ or
- Via the Patient Details window, in the Referring Doctor section, click , and then click \_\_\_\_\_\_Add...

Referring Doctor	
Dr M Lobel (for any, 2 current) Expires 11/2014 (12 month)	Ŧ
Mortier, Vivian, Dr (any) Expires 06/2014 (12 month) Lobel, Mark, Dr (any) Expires 11/2014 (12 month)	
<u>A</u> dd OK	Cancel



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

New Referral	? 💌
Practitioner	ок
Dr Bevan Ayers	▼
Referring doctor	Cancel
Dr Julie Kingsford	
<u>V</u> alid for	Commencing
12 months	24/02/2011
Hint: Type 0 (zero) for an i	ndefinite referral
Letter written	Doctor's reference
15/02/2011	BE342

- 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 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.

<u>jearen for</u>				0000
			_	Open
Name	Suburb		•	Cancel
Abbott, Harry	BRISBANE QLD			
Browning, Mark	MELBOURNE VIC			New
Elisson, Christoph	KOGARAH NSW			
Harrison, Vincent	KIPPA-RING QLD			Sp <u>e</u> cial »
Johnston, Eric	RANDWICK NSW			
Kingsford, Julie	MONASH ACT		Ŧ	Open Pick List
Display Only Preferred	De Uners Abbett			
Include Inactive	1234 William Street Db 3712 4568			
	BRISBANE OLD 4000	5712 1500		
Include Deceased				
Inactive				
Deceased			-	
9 files found.				

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

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

Notes:

- $\circ~$  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.
- $\circ\;$  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;
  - o Double-click the slot, or
  - o Right-click the slot and select Add Appointment from the menu that appears.
- 4. The New Appointment Wizard appears.

New Appointment	New Appointment Wizard				
Create new a	appointment				
Pr <u>a</u> ctitioner	Dr Bevan Ayers 👻				
Patient	Andrews, Jennifer S, Ms				
<u>T</u> ype	New				
Status	Booked -				
Duration	40 minutes				
Referring Doctor	Dr V Mortier (for any) Expires 11/2013 (12 month)				
	Make multiple recurring appointments				
	Cancel < <u>B</u> ack <u>N</u> ext >				



- 5. Type the patient's name into the **Patient** text box.
- 6. Select the type of 2 appointment from the New Appointment Wizard associated dropdown list. Create single appointment 7. Click <u>Next</u> > A free comment space is Date 22/05/2012 ▦ Appointment book... Find Slot... provided to record any relevant information 3:00 pm 0 Time regarding the patient's appointment. \* Indicates currently allocated column Priority (Highest) • 1 Complete patient details sheet upon arrival. Need to record and Comment 8. Click <u>Next</u> > and scan referral. Blood work. then Finish to return to the Press Ctrl+Enter to add a new line Appointment Book. Cancel < <u>B</u>ack Next >

#### 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.

Appointment Book		
Today's Patients Appointment Book	Groups All    Practitioners Dr Grant Kong, Dr Beva   Find Slot SMS	
Waiting Room Banking	1/4 Dr Grant Kong 1/2 Dr Bevan A 1/1 . Day Surgery ▲ January ▶ 4 2012 ▶	
Bank Transfers Batches	45 Wed, 4 January Wed, 4 January Wed, 4 January 1 26 27 28 29 30 31 1	
Medicare Australia WP Deferred Printing	1         00         (1) Ms         (1) Mr Fred         3         9         10         11         12         13         14         15           4         16         17         18         19         20         21         22	
WP Review Recalls Waiting List	15 Andrews (1:00 (1:00 PM-2:00 PM)	
MD Billing	45 February 2012	
	15 8 13 14 15 16 17 18 19	
	45 9 20 21 22 23 24 25 26 Davis (2:30 PM-4:00 PM) 10 27 28 29 1 2 3 4	
	<b>3</b> 00	
	15 Today	
	30 Jump To: 04-01-2012	_
	/	8

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



4. The New Appointment Wizard appears.

New Appointment Wizard			
Create new a	ppointment		
Practitioner	Dr Bevan Ayers 👻		
Patient			
<u>T</u> ype	New		
<u>S</u> tatus	Booked 👻		
Duration	40 minutes		
<u>R</u> eferring Doctor	no current referral		
	Make multiple recurring appointments       Cancel       < Back       Next		

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.

New Appoir	ntment Wizard
Create s	single appointment
<u>D</u> ate	22/05/2012 Appointment book Find Slot
Time	3:00 pm
Priority	1 (Highest) <ul> <li>Indicates currently allocated column</li> </ul>
<u>C</u> omment	Complete patient details sheet upon arrival. Need to record and scan referral. Blood work.
	Press Ctrl+Enter to add a new line
	Cancel < Back Next >

- 6. Click Next > A free comment space is provided to record any relevant information regarding the patient's appointment.
- 7. Click Next > and then Figish 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;
  - o Double-click the slot, or
  - o Right-click the slot and select Add Appointment from the menu that appears.
- 4. The New Appointment Wizard appears.

New Appointment Wizard					
Create new a	ate new appointment				
Pr <u>a</u> ctitioner	Dr Bevan Ayers 👻				
Patient					
<u>T</u> ype	New				
<u>S</u> tatus	Booked 💌				
Duration	40 minutes				
<u>R</u> eferring Doctor	no current referral				
	Make multiple recurring appointments       Cancel     Eack				



- 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 New The New Patient window appears.

New Patient				? <mark>x</mark>
<u>T</u> itle	<u>G</u> iven	Initial Surname	2	OK
Date of <u>b</u> irth	Phone	Alt Phone	Mobile Phone	Cancel Copy <u>f</u> rom

- 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 <u>Next</u> > 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.

New Appoi	intment Wizard
Create	single appointment
<u>D</u> ate	12/11/2012         Appointment book         Find Slot
Time	9:00 am
Priority	1 (Highest)   Tindicates currently allocated column
<u>C</u> omment	Bring referral. Patient to complete details on arrival.
	Press Ctrl+Enter to add a new line
	Cancel < Back Next >

9. Click <u>Next</u> > to continue. You will be alerted to the fact that this patient does not have a referral.



10. Click Figish to confirm, and schedule the appointment.



#### Double-book a Patient

1. Create the first appointment. See <u>Appointments</u> for more information.

	2/4 Dr Grant Kong	2/2 Dr Bevan Ayers
	Wednesday, 17 October	Wednesday, 17 October
1 PM 15	(1) Master Graham Andrews (1:00 PM-1:30 PM)	
30 45		
2 00 15	(1) Ms Leslie Tavener (2:00 PM-2:30 PM)	(1) Mr John Andrews (2:00 PM-3:00 PM)
30		
45		J
2 00		

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

1 PM	(1) Master Graham Andrews (1:00 PM-1:30	
20	PM)	
40		

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

1 PM	(1) Master Graham Andrews (1:00 PM-1:30
20	PM)
40	

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.



- Click Seate You will be returned to the previous window where you can modify the priority of this appointment, via the drop-down list provided.
- 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.
- 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.

New Appoir	ntment Wizard	8 ×
Create s	single appointment	
<u>D</u> ate	22/05/2012 <u>Appointment book</u>	Find <u>S</u> lot
Time	1:00 pm	
Priority	2 (Lowest)  * Indicates currently a	llocated column
<u>C</u> omment	2 (Lowest)	
	Press Ctrl+Enter to add a new line	
	Cancel	< Back Next >



## **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 <u>Modifying Appointments</u>).

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.







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.

evan Ayers
y, 17 October
(2:00 PM-3:00 PM)
(2:00 PM-3:00 PM)
evan Ayers y, 17 October

- 2. Select which period of schedule(s) you wish to display, using the associated option buttons. You can select from:
  - o Day view
  - Work Week view
  - Week view, and
  - o 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** dropdown 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 <u>Next</u> 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 <u>Mext</u> > 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.

Ν	lew Appointment	Wizard					?	
	Revise recurri	ng appointi	nent	S				
	Date	Time	Col	Туре	Duration	Comment		
	Thu, 24/02/2011	11:20 am	1	New	40 mins			
	Thu, 03/03/2011	11:20 am	1	New	40 mins			
	Thu, 10/03/2011	11:20 am	1	New	40 mins			
			'					
	Print list			Cancel	< <u>B</u>	ack	Fi <u>n</u> ish	]

New Appointment Wizard

Date of first appointment

Number of appointments

Time between bookings

Best day/date in period

Allow double bookings

Cancel

Best time

Create recurring appointments

24/02/2011

Thursday

11:20 am

Week(s)

13

1

2

< Back

? ×

**\_\_\_\_** 

0

columns deep

Next >

- 17. (Optional) If MedicalDirector Blue Chip determines it necessary to present you with any warnings about the appointments you wish to record, the <u>Next</u> > 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.

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 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.
- 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** dropdown 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.

🐉 David Anderson - 49 - Bookings							
Patient Details							
Referrals						patient bookings	
Accounts							
Notes	Date	Time	Duration	Practitioner	Туре	Comments	
Correspondence	1/05/2012	8:20 am	40 min	BA	New		
Bookings	3/05/2012	10:40 am	20 min	BA	Rev		
Recalls	15/05/2012	8:00 am	40 min	BA	New		
Estimates	22/05/2012	10:40 am	40 min	BA	New		
ImageLite	24/05/2012	9:20 am	40 min	BA	New		
F3 - SMS Message							
F9 - Medical Director	ector <u>New</u> <u>Edit</u> <u>Cancel booking</u> <u>Pelete booking</u> <u>Print</u>						

Create new a	ppointment
Pr <u>a</u> ctitioner	Dr Bevan Ayers 👻
Patient	Anderson, David, Mr
Туре	New
<u>S</u> tatus	Booked
Duration	40 minutes
<u>R</u> eferring Doctor	no current referral
	Make multiple recurring appointments

- 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.

New Appointment Wizard					
Create recurring appointments					
Date of first appointment	24/02/2011				
Number of appointments	3				
Time between bookings	1 Week(s) 🔻				
Best <u>d</u> ay/date in period	Thursday 💌				
Best <u>ti</u> me	11:20 am 🧭				
Allow double bookings	2 <u>c</u> olumns deep				
Cancel <	Back Next >				

- 13. Enter a preferred time for the appointment in the Best Time field, either manually or via the  $\bigcirc$  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.



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New Appointment Wizard								
Revise recurri	ng appoin	tment	ts					
Date	Time	Col	Туре	Duration	Comment			
Thu, 24/02/2011	11:20 am	1	New	40 mins				
Thu, 03/03/2011	11:20 am	1	New	40 mins				
Thu, 10/03/2011	11:20 am	1	New	40 mins				
Print list		·	Cancel	< <u>B</u>	ack	Fi <u>n</u> ish		

- 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.

New Appointment Wizard	? 💌							
Review appointment warnings								
Warning: The last referral fr Anderson expires on 17/06/2	om Dr Vincent Harrison for Mr David 2009.							
	Cancel < Back Figish							



#### 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.

File Setup Reports	BC Tools SMS Window Help
2 🔒 🍯	
👷 Appointment Bool	
Today's Patients Appointment Book	Groups All   Practitioners Dr Grant Kong   Find Slot  SMS
Waiting Room Banking	1/4 Dr Grant Kong ▲ May ▲ 2012 ► Thursday, 24 May ▲ May ▲ 2012 ►
Bank Transfers Batches	9AM         (1) Master Graham Andrews (9:00 AM-9:30 AM)         19 30         1 2         3 4         5         6           20         7         8         9         10         11         12         13
Medicare Australia WP Deferred Printing	15         21         14         15         16         17         18         19         20           22         21         22         23         24         25         26         27
WP Review Recalls	30         (1) Ms Sallyanne Frinkus (9:30 AM-9:45 AM)         23         28         29         30         1           45         (1) Mr Graham MacMullen (9:45 AM-10:15 AM)         24         24         24         24
Waiting List	10 00 June 2012

- 2. Click the 🖨 button. The **Print Report** window appears.
- 3. Select one of the Appointment reports.
- 4. Click <u>Next</u> > 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 <u>Next</u> >
- 7. Set print options as desired and then click <u>Next</u> > to print the list of appointments.

Print Appointment list (no comment)										
Set Appointment list (no comment) Options										
Date Range:										
From date: 24/05/2012 🛅 To date: 24/05/2012 📑										
From time: To time:										
Practitioners / Appointment Types:										
Practitioner Appointment Types										
Dr Bevan Ayers New										
Review										
Post-op										
Theatre										
Medical Rep										
Medico Legai										
All Practitioners All Appointment types										
Cancel < <u>B</u> ack <u>N</u> ext >										

#### Modifying Appointments



There are many ways to edit existing appointments. The Outlook<sup>™</sup> 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 <u>set</u> 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 <b>Tab</b> key or clicking the <b></b> button to open the Search Patient facility.						
Туре	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.						

Edit Appointment Wizard										
Edit appointment details										
Pr <u>a</u> ctitioner	Dr Grant Kong 🗸 🗸									
<u>P</u> atient	Barker, Sterling N, Mr									
Type	New									
Status	Booked									
Duration	30 minutes									
<u>R</u> eferring Doctor	no current referral									
	Make multiple recurring appointments									
	Cancel < Back Next >									

#### 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.

Edit Appoint	tment Wizard
Resched	lule appointment
<u>D</u> ate	30/05/2012 Appointment book Find Slot
Time	9:30 am
Priority	1* (Highest)  * Indicates currently allocated column
<u>C</u> omment	
	Press Ctrl+Enter to add a new line
	Cancel < Back Next >

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).

								x
Display Dr Grant Kong 🗸 🔻 SMS	1	•						
	_	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Monday, 12 November 2012 (today)					1	2	3	4
GK (2/4)		5	6	7	8	9	10	11
9 AM Mr Sterling N Barker *		<u>12</u>	13	14	15	16	17	18
Complete patient details sheet upon arrival. Need to record and		19	20	21	22	23	24	25
	-	26	27	28	29	30		
30								
45	-					2012		
	_	Details for Dr Grant Kong						
15		Locat	on 1.			-		

#### 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.

Find Free Appointment Slot											
Practitioner Dr Bevan Ayers   BA (1/2)											
Preference New			•	9 AM	A 100 A 1						
	_			20							
Length 40 minutes											
Start date 28/02/2011 a Search											
				TU AM	Mr David J Anderson						
Search results			Next	20							
Data	Time	Driority		40							
Mon 28/02/2011	9:00 am	Phoney 1	Crows Nest	11 AM	Ms Heather Andrews						
Mon, 28/02/2011	10:00 am	2	Crows Nest	20							
Mon, 28/02/2011	11:00 am	2	Crows Nest								
Mon, 28/02/2011	1:00 pm	1	Crows Nest	40							
Tue, 1/03/2011	9:00 am	1	Crows Nest	12 PM							
Tue, 1/03/2011	10:00 am	1	Crows Nest	20							
Tue, 1/03/2011	11:00 am	1	Crows Nest	40							
Tue, 1/03/2011	1:00 pm	1	Crows Nest	4 11							
Fri, 4/03/2011	9:00 am	1	Lismore	1 PM							
Fri, 4/03/2011	10:00 am	1	Lismore	20							
Mon. 14/03/2011	9:00 am	1	Crows Nest	40							
11011/11/00/2011	5100 am	-	cronortest	0.00							
					OK Cancel						

Click <u>Search</u> 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 <u>Next</u> > 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.

Edit Appoint	ment	: Wiz	zard					S 23
Resched	ule a	арр	oint	tme	nt			
<u>D</u> ate	12/1	1/20	12				Appo	pintment book Find <u>S</u> lot
Time	Mon	Tue	Wed	Thu 1	Fri 2	Sat 3	Sun 4	Mon, 12 Nov 2012
Priority	5	6	7	8	9	10	11	Free 30 minute slots: 190
	<u>12</u>	13	14	15	16	17	18	Total free slots: 192
<u>C</u> omment	19	20	21	22	23	24	25	Open hours:
	26	27	28	29	30			9:00 am - 12:00 pm
								1:00 pm - 4:00 pm
	<	No	over	nbe	r 20	12	>	OK Cancel
	 	CH-I					It	
	Press	Ctrl	+Ent	er to	add	a ne	ew lin	e
							Ca	ncel < Back Next >
						_		

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

Blue Chip
That timeslot overlaps an existing appointment. Please change the column, time or duration of the booking.
OK

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

#### Changing the Appointment Time with the Time Control

Click the clock  $\mathfrak{S}$  button at the end of the Time field to display the free appointment times for the date displayed in the date field.

Edit Appoin	tment Wiz	zard		8 X
Resched	lule app	ointr	nent	
<u>D</u> ate	12/11/20	12		Appointment book Find Slot
Time	9:00 am		3	
Priority	8:30	1	2	* Indicates currently allocated column
<u>C</u> omment	8:45		_	
	9:00	┝		
	9:30			
	9:45			now line
	10:00			a new line
	10:15			
	10:30			
	10:45			Cancel < <u>B</u> ack <u>N</u> ext >
	11:00		-	
	OK	0	Cancel	

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)**.

9:00 am			0		Edit Appointment Wizard
	1	2	*	1	Reschedule appointment
6:00					
6:15					Date 12/11/2012 Appointment book Find Slot
6:30					
6:45					
7:00					Priority 2 (Lowest)  * Indicates currently allocated column
7:15			]		Comment
7:30					
7:45					
0.00			1 -		Press Ctrl+Enter to add a new line
OK		Cance	el		Cancel < <u>B</u> ack <u>N</u> ext >

Click Next > (and then Figish 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).

45 10 15 30	10:00 AM-10:30 AM (1) Ms Lubica Doranovic		
45	Ms	Lubica Doranovic (10:00 AM -	10:30 AM)
11 00	4	) Status: Booked	
10	/		

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



#### 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.

🐑 David Anderson - 49 - Bookings						
Patient Details						nation the olinas
Referrals						patient bookings
Accounts						
Notes	Date	Time	Duration	Practitioner	Туре	Comments
Correspondence	1/05/2012	8:20 am	40 min	BA	New	
Bookings	3/05/2012	10:40 am	20 min	BA	Rev	
Recalls	15/05/2012	8:00 am	40 min	BA	New	
Estimates	22/05/2012	10:40 am	40 min	BA	New	
ImageLite	24/05/2012	9:20 am	40 min	BA	New	
F3 - SMS Message						
F9 - Medical Director           New         Edit         Cancel booking         Delete booking         Print						

From this screen, the patient's past and future appointments are listed, and they can be printed via <u>Print...</u> 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.

1 00	(1) Master Graham Andrews (1:00 PM-1:30	0 PM)				
15	<u>.</u>	Edit A	ppointment	1		
30		Delet	e Appointment			
45		Statu	5	•	Booked	_
2 00		View	Patient Details		Waiting	
15		View	Patient Bookings		Consulting	
30		Add			Departed	
45			oppontenent		No Chara	
3		Send	SMS		No Show	
15					Cancelled	
30				_		

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.



## **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:

- o Initialising the new SMS registration from within MedicalDirector Blue Chip.
- $\circ$   $\,$  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.

SMS	SMS Registration				
(		SMS reminders are now available in Blue Chij setup is required. Would you like to perform t	o. To use this facility, reg nese tasks now ?	istration and	
Ē	Don	ot show this message again to any user.	Yes	No	

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.

SMS Register	? <b>- X-</b>
Username:	
New password:	
Confirm new password:	
OK Ca	ncel

MessageNet/Bluechip Soft *Piease note	ware Online Registration Request all fields are required.
Practice Name: *	Practice ID: *
For Your Health	5747562893
Postal Address: City:	State: Postcode:
Contact Details: Name: * Position:	Billing Contact Details:
Phone Number: * Email: *	Phone Number: Email:
Account Type: * Prepaid 200 (inc GST) 20c per SMS \ efax pages	Payment Type: * Credit card •
Payment Details: Card Type: Exect Card Type: Expiry Date: I Month Veen Create Card D: 0	Card Number: Name as on card:
Industry: *	
Comments:	*
Submit Reset TRC's accepted *	*



- 7. Once you have completed the registration form, click <u>Submit</u> 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 <u>Verify Registration</u> 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.

Register	SMS Account Details
Register for SMS Verify Registration	Username: Practitioner  Register  Register for SMS  Verify Registration  Registration
	Password Change <u>P</u> assword

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

SMS Reminders Setup						
Registration Details   Standard Message   Message Schedule   SMS Scheduler   Credit Statu						
If your organization uses proxy server to connect to the internet and requires authentication, please provide these details below.						
🔽 Use proxy	Use proxy for SMS Scheduler					
HTTP Proxy:	ourproxy.thepractice.com	n.au	Port: 8080			
Username:	username					
Password:	****					
Domain:	thepractice.com.au					
If these credentials are changed (by, say, a required monthly password change), the changes must be manually updated in this section.						
			ОК	Cancel		



#### **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 dropdown 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 alphanumeric 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 to confirm and save your standard messages.



#### **Scheduling Messages**

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

SMS Reminders Set	up		? 💌				
Registration Details	Standard Message	Message Schedule	SMS Scheduler Credit Status				
Intervals							
Send SMS Rem More than one i	Send SMS Reminders at the specified interval before the actual Appointment Date. More than one interval can be chosen.						
🗖 7 Days	🔲 5 Days	🥅 4 Days					
🗖 3 Days	🔽 2 Days	🗂 1 Day					
SMS Reminder S	cheduler						
Choose a scheo Reminders,	duled time, for the SM	S Reminder Service to	o Send the SMS				
Run at (time of c	day): 9:00 am						
Do not send reminders on closed/absent days							
			OK Cancel				

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.

SMS Reminders Setup	? <b>X</b>
Registration Details   Standard Message   Message Schedule   SMS Scheduler	Credit Status
Credits	
Click on the "Get Credits" button to obtain the number of SMS message cred that the Practice currently has in reserve.	lits
SMS Message Credits: <unknown></unknown>	Credits
OK	Cancel

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



## **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.

🚯 David J Anderson -	49 - Accounts					• • <mark>• × •</mark>
Patient Details Referrals Accounts					patient	accounts
HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Correspondence Bookings Recalls Estimates						
ImageLite F3 - SMS Message F9 - Medical Director	Open existing account <u>Open existing account</u> <u>Open existing account</u>			Total	Balance	2877.85

2. Click <u>**Create new account...**</u> The **New Account** window appears.

	New Accoun	t			? ×
	Patient	David Anderso	on		ОК
	Banked to	Practitioner	Dr B Ayers - CN 🔹		Cancel
		Provider no.	2122361B		
		Account	St Leonards		
	<u>C</u> lass	Private	•	_	
	Issue to	Patient	-		
	Account ref	27			
1					

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

	Account Details						
IMC ECLIPSE account with Acct ref 27	ОК						
Issued to Patient 0.00 Status Normal	Cancel						
Health Fund Membership 1. CBHS Health Fund Ltd - My Health Fund Account (#MHF 1234567	<u>R</u> eset balance						
Tick if name appears differently on Health Fund card	Addressee						
Health Fund CBHS Health Fund Ltd	Delete						
Member Surname Member Given Name	Delete						
Account Name My Health Fund Account							
Membership No. MHF123456786 Ref No. Expiry Date 11/05/2013							
Level of Cover Top 🔽 Default Membership							
Last Verified: 16 Jan 2012 at 10:29 am Verify Now							
Contacts							
Next of Kin Ms Penny P Anderson							
Other details  Medicare Claimant  David J Anderson	n 💌						

#### **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.

Select Health Fund			? ×
Search for			<u>O</u> pen
	<u></u>		Cancel
CBHS Health Fund Ltd	PARRAMATTA NSW		New
HCF	SYDNEY NSW		<u></u>
Medibank Private NIB	SYDNEY NSW NEWCASTLE NSW		Sp <u>e</u> cial »
			Open <u>P</u> ick List
Display Only Preferred	CBHS Health Fund Ltd		
Include Inactive	Locked Bag 5014	Ph 1300 654 123	
Include Deceased	PARRAMATTA NOW 2124		
4 files found.			
Ľ			

3. Click \_\_\_\_\_\_\_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.

Account Name	
Membership No.	Ref No. Expiry Date
Level of Cover	✓ Default Membership

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

Contacts	
Next of Kin	

- 6. Click 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.

😍 David Anderson - 4	49 - Patient Detail	ls								
Patient Details	<u>T</u> itle	<u>G</u> iven	Initial	Surname		Status			+	
Referrals	Mr	David		Anderson		Active	-	patte	nt aetails	
Accounts	Gender Salutation				Date of <u>b</u> irth	Age				
Private (BA-UN)	Male				4/11/1955 57 years					
Correspondence	, Desidential Adds					Deceased Date				
Bookings	Residential Addr	ess Postal Address								
Recalls	61 Wallace Stre	eet								
Estimates						49				
ImageLite						Accounts			new	
	MELBOURNE			/IC	3000	Practitioner	Class	Acct. Ref.	Balance	
	Default addr	ress (Address Line 1 a	nd Suburb	are require	ed)	BA-CN	Priv	27	707.65	
					·	DS	DSMBP	28	0.00	
	Pho <u>n</u> e	Alt Ph		Mobile P	hone	GK-CN	Priv	29	0.00	
	(03) 1234 5678	(03) 1234 56	79	041123	4567					
	Email			📃 Do no	ot send SMS					
	david.anderson@	@demotownpolytechnic	.edu.au							
	Comment				First visit date	Referring <u>D</u> octor				
	I					Dr M Lobel (for any)				
	Occupation		Card No	, ,	Valid to Ref	Expires 09/2014 (12 month)				
	Test Engineer	O Medicare	3500 2	6512 1	12/2014 1	Health Fund Membership Summary				
		Veteran	1		1	Health Fund	d	E	xpiry Date	
	Last verified using	Last verified using Medicare Australia: Not yet verified.			CBHS Health Fund Ltd 21/01/2016					
	Verify patient	Verify patient before invoicing. Verify with Medicare Australia			Membership	No.	Level of C	over		
						MHF 12345	678	Тор		
	Patient's name is different on the DVA Card									
E3 - SMS Message	Alias Given Nam		Alias Surn	ame						
F9 - Medical Director										
			Pat	ient deaf	in left ear				<u>A</u> lerts	
			_	_		_	_	_		


# 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 The Account Details window appears. Complete other details as desired.
- 6. Click You will be returned to the Accounts window.

New Accour	nt				
Patient	David Anders	David Anderson			
Banked to	Practitioner	Dr B Ayers - CN 🔹	Cancel		
	Provider no. Account	2122361B St Leonards			
<u>C</u> lass	Private	▼			
<u>I</u> ssue to	Health Fund	(from membership) 🔻			
<u>A</u> ccount ref	27				

0 00

# 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 The Account Details window appears, displaying information for the solicitor.

Account Details		? ×
Third Party account with Dr Bevan Ayers Issued to Solicitor	Acct ref         29           0.00         Status         Normal	OK Cancel
Contacts Insurer Solicitor		<u>R</u> eset balance <u>A</u> ddressee Delete
Other details Claim No	Injury Date	

- 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 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 <u>**Create new account...</u>** The **New Account** window appears.</u>

New Accour	ıt	? ×
Patient	David Anderson	ОК
Banked to	Practitioner     Dr B Ayers - CN       Provider no.     2122361B       Account     St Leonards	Cancel
Class	MA Online BB	
Issue to	Medicare Australia Direct Bill	
<u>A</u> ccount ref	27	

- 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 The **Account Details** window appears.

Account Details	S X
HICO Bulk Bill account with     Acct ref     27       Dr Bevan Ayers     Issued to Medicare Australia Direct Bill     0.00     Status     Normal	OK Cancel
Contacts	Reset balance
Other details	

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



# Adding a New Health Fund

For convenience, ensure you have done the following first;

- o 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.
- 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.

Usual GPs Hospitals New Delete	Setup Company Groups Next of Kin Insurers Solicitors Employers Health Funds	Name Health Funds Addressee type	OK     Cancel
<u>New</u>	New     Delete	Addressee type Health Fund	

Open			? ×
Search for	List Health Funds		<u>O</u> pen
Name CBHS Health Fund Ltd	Suburb PARRAMATTA NSW		Cancel
HCF Medibank Private	SYDNEY NSW SYDNEY NSW		<u>N</u> ew
NIB	NEWCASTLE NSW		Sp <u>e</u> cial »
			Open <u>P</u> ick List
Display Only Preferred	CBHS Health Fund Ltd Locked Bag 5014	Ph	1300 654 123
Include Deceased Inactive	PARRAMATTA NSW 2124		
Deceased	·	_	
4 files tound.			

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

Contact informatio	n	Default representative	Cancel
Address		None	Cancer
		File No	
Phone	Fax	Alt. salutation	
Email		Company group	
Preferred		Health Funds	
mment			



- 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 to confirm. The new record is added to the list of Health Funds and you are presented with the Company Details window.

😻 CBHS Health Fund	l Ltd - Company details	- • •
Company details Representatives	Name CBHS Health Fund Ltd	company details
	Contact information Address Locked Bag 5014 PARRAMATTA NSW 2124	Default representative None
	Phone 1300 654 123 Fax Email	Alt. salutation Company group Health Funds
	Comment Health fund properties	
	Fee list     DSMBP - DS MBP       Inpatient Medical Claiming (IMC) setup       Fund ID     DHF - Defence Health Limited       Claim type     Scheme	
	Setup practitioners daim type	<i>I</i> .

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).
  - Select the default Claim Type for the Health Fund (either 'Scheme' or 'Agreement').
  - c. Click Setup practitioners daim type

By default all your Practitioners will appear in the 'default' Health Fund Claim Type.

 click on the < or > buttons to move your practitioners between 'Scheme' or 'Agreement'

Health Fund Practitioner Claimin	g Types	? 💌
Health Fund: CBHS Health Fu	nd Ltd	
Select practitioners to either Schem hold down Ctrl key and click on the	e or Agreement. To n left mouse button.	nulti-select practitioners,
Practitioners in a Fund Scheme	Practitione	ers in a Fund Agreement
. Day Surgery Dr Bevan Ayers Dr Grant Kong	> <	
	<u>5</u> a	/e



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.

	Contacts	
	Next of Kin	
ļ		

- 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 <u>below</u> for adding a new Next of Kin record.

Select Next of Kin				? X
Search for				<u>O</u> pen
Name	Suburb			Cancel
Dsouza, Marcel R	BURBONG NSW			New
Tavener, Jamie M	RANFORD WA			
				Sp <u>e</u> cial »
				Open <u>P</u> ick List
Display Only Preferred	Mr Marcel R Dsouza			
Include Inactive	1213 Biletic Hwy	Ph	6238 1938	
Include Deceased	BURBONG NSW 2620	Alt	0413 298 183	
Inactive				
Deceased		-		
2 files found.				
		_		

- 2. Click \_\_\_\_\_ to return to the Account Details screen.
- 3. Click \_\_\_\_\_ to return to the Patient Details screen.

#### Adding a New Next of Kin Record

- 1. On the Select Next of Kin window, click <u>New...</u>
- 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 \_\_\_\_\_ to confirm and save this record.

<u>T</u> itle	<u>G</u> iven	Initial Surname	_
Salutation		D	ate of <u>b</u> irth
Add <u>r</u> ess			_
Pho <u>n</u> e	Alt Ph	Email	
<u>C</u> omment			
● <u>M</u> edicare C ● Veteran	Card No Valid	d to Ref	
Erom Patient		ОК	Cancel

्र MedicalDirector

Changing the Addressee for the Account

New Parent

#### MedicalDirector Blue Chip User Guide

Account Details					? 🗙
Private account with		A <u>c</u> ct ref	27		ОК
Issued to Patient	0.00	<u>S</u> tatus	Normal		Cancel
Health Fund Membersh	ip 1. CBHS Health Fund Ltd - My H	lealth Fund	Account (#MHF1	234567 💌	<u>R</u> eset balance
Tick if name appea	rs differently on Health Fund card				Addressee
Health Fund CB	HS Health Fund Ltd		_	•	

- 1. On the Account Details window, click <u>Addressee</u>... The **Change Account Addressee** window appears.
- 2. Select the account addressee to issue to via the associated drop-down list. Click 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.

Open			? X
Search for	List	<u>B</u> y	
	Patients	Name	 <u>O</u> pen
Name	Subur Patients		 Cancel
Anderson, David	MELBC Companies		Cancer
Anderson, Penny	MELBOParents		
Andrews, Anna	DACE Debt Collectors		New
Andrews, Fred	ST KII Insurers		 

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

Account Details		8 ×
Third Party account with	Act ref 27	ОК
Issued to Solicitor	0.00 Status Normal	Cancel
Contacts		<u>R</u> eset balance
Insurer GIO (Parrama	itta)	◆ <u>A</u> ddressee
Solicitor		Delete

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

Select Solicitor				? <mark>x</mark>
Search for				<u>O</u> pen
Hunt & Hunt Solicitors				Cancel
Name	Suburb			
Hunt & Hunt Solicitors	SYDNEY NSW			<u>N</u> ew
				Sp <u>e</u> cial »
				Open <u>P</u> ick List
Display Only Preferred	Hunt & Hunt Solicitors 123 Macquarie Street	Ph	9233 3313	
Include Deceased	SYDNEY NSW 2000			
Inacuve				
Deceased				
1 file found.				

## **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.

🖲 David J Anderson	- 49 - Accounts					
Patient Details Referrals Accounts					patient o	accounts
HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Correspondence Bookings Recalls Estimates						
ImageLite F3 - SMS Message	Open existing account					
F9 - Medical Director	Print labels			Total	Balance	2877.85

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

Print Report	? 💌
Select report Labels - laser Labels - SLP	Description Report type Labels
	Cancel < <u>B</u> ack <u>N</u> ext >

4. Select which type of labels you wish to print, and then click \_\_\_\_\_ 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 <u>Mext</u> > 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.

🚯 David J Anderson -	49 - Accounts					
Patient Details Referrals Accounts					patient	accounts
HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Bookings Recalls Estimates						
ImageLite F3 - SMS Message F9 - Medical Director	Open existing account					2077.05
	Print labels			lotal	Balance	2011.85

4. Click Account Details The Account Details window appears.

Account Details		? ×
Third Party account with Dr Bevan Ayers Issued to Solicitor 0	Acct ref         29           5.00         Status         Normal	OK Cancel
Contacts Insurer Solicitor		<u>A</u> ddressee Delete
Other details Claim No Injury Date	Medicare Claimant	•

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

## Estimates



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.

🚯 David J Anderson	- 49 - Estimates				
Patient Details Referrals Accounts	Show estimates added since: 16/08/2010	i to create an ir	nvoice	es	timates
Notes Correspondence Bookings Recalls Estimates ImageLite	Expires         Practitioner           15/03/2011         Dr Bevan Ayers - Crows Nest           16/03/2011         Dr Bevan Ayers - Crows Nest           14/04/2011         Dr Bevan Ayers - Crows Nest	Class Lismore Base Lismore Base Lismore Base	Estimate Name Initial Consultation New Estimate	Service Items 15245, 15260 110 34103, 44, 45564, 1	Amount 218.30 121.10 2354.45
F3 - SMS Message F9 - Medical Director	<u>V</u> iew	Clone	Print	Create <u>I</u> nvoi	.e

<u>N</u> ew	To create an Estimate.
<u>V</u> iew	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 <u>I</u> nvoice	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 \_\_\_\_\_\_ The **New Estimate of Fees** window appears

ew Estimate of Fees								? X
🗸 In Hospital Services			P <u>r</u> acti	tioner	Dr B	3 Ayers - CN		
🗸 Health Fund	Medicare		<u>C</u> lass		Lisn	nore Base		
Multiple procedure scaling	)		<u>I</u> ssue	to	Hos	pital		
Discount	· · · · · ·	C <u>u</u> stom	J					
✓ Invoice message	Sample Inv Msg 🔹	Cus <u>t</u> om	H/ <u>F</u> F	lebate ba:	sed on Me	dicare		
Item	Description		Fee	Scaling	Medicare	Health Fund	Gap	Total
Estimate will expire on 21	/11/2013 📠				Тс	otal (Incl GS	г)	0.00
Estimate <u>N</u> ame			📃 View GS	T Details	G	я	_	0.00
DVA White Card Text					Ga	ap total		0.00
		D.	and a second					

- 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 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).

New Estimate of Fees				8 X
🔽 In Hospital Services	Bunbury Private Hospital	Practitioner	Dr B Ayers - CN	•
🔽 Health Fund	V Medicare	<u>C</u> lass	Private	•
Multiple procedure scaling		Issue to	Patient	•
Discount	Custom			
Invoice message	Cusjom	H/ <u>F</u> Rebate based on	Health Fund Service	• •
Item	Description	Fee Medi	care Health Fund	Gap Total
32090 Fibreoptic colonos	copy examination of colon beyond the hepatic	flexure 450.00 22	21.55 157.20	71.25 450.00
Estimate will expire on 25/	12/2013 📷		Total (Incl GST)	450.00
Estimate <u>N</u> ame		View GST Details	CST	0.00
DVA White Card Texi			Gap total	71.25
Requesting Provider		uest e Date	ок	Cancel

- 1. Set up the estimate as outlined above for a <u>Private Patient</u>.
- 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.

🚯 David Anderson - 4	49 - Private (B	BA-CN)										• <b>×</b>
Patient Details Referrals				Show re	cords for: All	From: 2	1/03/2014	То	: 21/03/2	014	Show	audit trail
Accounts Private (PA CN)	Invoices R	eceipts Refun	ds History Write o	ffs History	Account Debtors Account Cre	edits						
Notes	Issue Date	Invoice No.	Transaction Type	Reversed	Invoice Items	Batch ID	Sundry	Amount	Paid	Write off	Discount	Owing
Correspondence	21/03/2014	41	Invoice		49530, 49539, 49558			3384.40				3384.40
Recalls												
Estimates												
ImageLite												
								Net	v <u>I</u> nvoice	<u>O</u> pen	M	Irite off
F3 - SMS Message	Show rev	versals			Debtors Balance: 3384	4.40 Cr	edits Bala	ance:	0.00	Balanc	e: 3	384.40
F9 - Medical Director							Account Tr	ansaction L	isting A	ccount Deta	ils	Close

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

Patient Details	Practitioner:	Dr Bevan Ay	ers - Crows N	lest					
Referrals Accounts	MD <u>B</u> illing:	(None)			•	·			invoice
Private (BA-CN)	Date	Item	Fee		Item	Description		Gap	Total
New Invoice	21/03/2014								
Correspondence									
Bookings Recalls									
Estimates	Multiple p	rocedure [	View GST	Details			Sub	total	0.00
ImageLite	Discount	l				C <u>u</u> stom	-	GST	0.00
	🔲 Invoice m	essage			-	Custom	Balance		0.00
	Provided I	by locum 🛛			-		Gan	total	0.00
	🔲 Hospital s	ervices 🛛					Gup	cocar	0.00
	Distance Tra	velled (km)							
	DVA White C	ard Text							
F9 - Medical Director	Requesting F	'rovider							
	Request Issu	e Date		Self [	Deemed	Add Receipt	įssue į	<u>)</u> efer	<u>C</u> ancel

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 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.

Issue Invoice
Do you want to issue the invoice now?
Date of issue: 21/03/2014
OK Cancel

🐮 David Anderson - 4	49 - Ne	w Receipt									- • <b>X</b>
Patient Details Referrals	New re	eceipt									receipt
Accounts	Payme	nt method									
Private (BA-CN)		Туре		Name	2		Bank/Card	Branch/D	etails A	mount	Eftpos Status
New Receipt											
Notes											
Correspondence											
Bookinas											
Recalls	1										
Estimates									Total Rece	ived	0.00
ImageLite	Allocat	ions									
	Pract	Patient		Service Date	Item	Total Fee	Gap	Discount	Owing		Allocate
	BA	Anderson, David	Priv	21/03/2014	49530	2096.60	349.45		2096.60		
	BA	Anderson, David	Priv	21/03/2014	49539	998.35	166.40		998.35		
	BA	Anderson, David	Priv	21/03/2014	49558	289.45	48.25		289.45		
F3 - SMS Message	Add	items Prepar	yment.	<u>O</u> verpa	yment	]					
	Me Me	essage		-	Custon	b			Issu	=	<u>C</u> ancel
											14 141

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, preselected with receipt options.
- 15. Click Print 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.



Print Report	? 💌
Select report Standard receipt Std Rec + Medicare Claim Form	Description Report type Receipt
Eile	< <u>B</u> ack <u>P</u> rint

# Standalone Invoice

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

🐮 David Anderson - 4	49 - Private (B	A-CN)										
Patient Details Referrals				Show re	cords for: All	From: 2	1/03/2014	То	21/03/2	014	Show	audit trail
Accounts	Invoices Re	ceipts Refun	ds History Write o	ffs History	Account Debtors Account Cr	edits						
Notes	Issue Date	Invoice No.	Transaction Type	Reversed	Invoice Items	Batch ID	Sundry	Amount	Paid	Write off	Discount	Owing
Correspondence	21/03/2014	41	Invoice		49530, 49539, 49558			3384.40				3384.40
Recalls												
Estimates Imagel ite												
imageLite												
								Nev	w <u>I</u> nvoice	<u>O</u> pen	W	rite off
F3 - SMS Message	Show rev	ersals			Debtors Balance: 338	4.40 Ci	edits Bala	ance:	0.00	Balance	3	384.40
							Account Tr	ansaction L	isting A	count Detai	ils	Close

- 2. Click New Invoice 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.



atient Details	Practitioner:	Dr Bevan Ay	ers - Crows N	lest				
eterrals ccounts	MD <u>B</u> illing:	(None)			•			invoid
Private (BA-CN)	Date	Item	Fee	Iten	n Description		Gap	Total
New Invoice	21/03/2014	23	38.52	Professional attendance at co	nsulting rooms (not b	eing a service to	6.45	38.5
otes	21/03/2014	43005	482.52	Photodynamyic therapy, one e	ye, for patients who	commenced phot	140.75	482.5
rrespondence	21/03/2014	43017	93.84	Infusion of verteporfin for disc	ontinued photodynar	nic therapy, wher	27.35	93.8
okings	21/03/2014							
	Discount     Invoice m     Provided I	essage		* *	Custom	Balance	61	4.95
		by locallin (		•		Gap t	otal	174.55
	📃 Hospital s	ervices						
	Distance Tra	velled (km)						
	DVA White C	ard Text						
- Medical Director	Requesting P	Provider						
	Regreet leer	a Diata 🛛		Self Deemed	Add Beceint	Issue Dr	efer	Cancel

- 5. Click You may be prompted to select a referral. This is optional. The **Issue Invoice** window appears.
- 6. Click The **Print Report** window appears.
- 7. Click **Print** You will be prompted to select a printer destination and settings.

Issue Invoice
Do you want to issue the invoice now?
Date of issue: 21/03/2014
OK Cancel

8. Click 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).

C David Anderson - 4 Patient Details	49 - Private	(BA-CN) Sho	w recor	ds for: All	_	✓ From the second s	om: 21/03/2014	To:	21/03/20	14	Show a	🗆 💌
Accounts	Invoices	Receipts	Refun	ds History	Write o	ffs History	Account Debtors	Account Cr	edits			
Private (BA-CN) Notes	Issue Date	e Invoid	e No.	Transactio	n Type	Reversed	Invoice Items		Batch ID	Sundry	Amount	Paid
Correspondence	21/03/201	.4 41		Invoice			23, 43005, 43017	7			614.95	
Bookings Recalls Estimates ImageLite	•							New	Invoice	<u>O</u> pen	<u>W</u> r	• ite off
F3 - SMS Message F9 - Medical Director	Show r	reversals	D	ebtors Bal	ance:	614.9	5 Credits Bala	ance:	0.00 ting Acc	Balance ount Details	: <b>f</b>	614.95 lose
												.1

# Multiple Procedures - In Rooms (outpatient)

1. Create an invoice as shown previously.



Patient Details	Practitioner:	Dr Bevan A	yers - Crows N	lest				
Heterrals Accounts	MD <u>B</u> illing:	(None)			-			invoice
Private (BA-CN)	Date	ltem	Fee		Item Description		Gap	Total
New Invoice	21/03/2014	49530	2096.58	Knee, total replacement ar	throplasty of, revision	procedure, requiring	786.20	2096.60
Notes	21/03/2014	49539	998.34	Knee, reconstructive surge	ery of cruciate ligamer	its (open or arthrosc	374.35	998.35
Correspondence	21/03/2014	49558	289.44	Knee, arthroscopic surgery	of, involving 1 or mo	re of: debridement,	108.55	289.45
Bookings	21/03/2014							
Recalls Estimates				Datala				
esumates Imagel ite		ocedure		Details	_	Sub to	otal 3	384.40
magetike	Discount				C <u>u</u> stom	+ 0	SST	0.00
	🔲 Invoice m	essage			Custom	Balance	338	4.40
	Provided I	by locum			•	Gan to	otal 1	269 10
	📝 Hospital s	ervices	For Your Hea	alth		Gapite		205.10
	Distance Tra	velled (km)						
F3 - SMS Message	DVA White C	ard Text						
9 - Medical Director	Requesting P	rovider						
	Request Issu	e Date		Self Deemed	Add Receipt	<u>I</u> ssue <u>D</u> el	fer	<u>C</u> ancel

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.

Multiple P	rocedure	Scaling						×
Date	Item No	Description	MBS Fee	Fee	Gap	Scale	Net Amount	Service Text
21/10/2013	49530	Knee, total replacement arthr	1747.15	2096.58	786.20	100.00%	2096.60	
21/10/2013	49539	Knee, reconstructive surgery	831.95	998.34	187.20	50.00%	499.20	
21/10/2013	49558	Knee, arthroscopic surgery of	241.20	289.44	27.15	25.00%	72.40	
						5	ub total GST	2668.20 0.00
						E	OK	2668.20

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

Hospital Services - Inpatient



Patient Details	Practitioner:	Dr Bevan Ay	yers - Crows N	est					imuoio
Heterrals Accounts	MD <u>B</u> illing:	(None)				•			INDOLCE
Private (BA-CN)	Date	Item	Fee		Item	Description		Gap	Total
New Invoice	25/11/2013	43005	482.52	Photodynamyic the	erapy, one e	ye, for patients who	o commenced phot	482.55	482.55
Notes	25/11/2013	43017	93.84	Infusion of vertepo	orfin for disco	ntinued photodyna	mic therapy, wher	93.85	93.85
Correspondence	25/11/2013	23	38.52	Professional atten	dance at cor	nsulting rooms (not	being a service to	38.55	38.55
Bookings Recalls	🔽 Multiple pr	rocedure	📃 View GST	Details			Sub	total	614.95
Estimates	Discount				-	C <u>u</u> stom	+	GST	0.00
ImageLite	🔲 Invoice m	essage	Sample Inv M	lsg	-	Custom	Balance	61	4.95
	Provided I	by locum			•		Can	total	614.95
	🔽 Hospital s	ervices	St Vincents F	Private Hospital			Gab	totai	014.55
	Distance Tra	velled (km)							
	DVA White C	ard Text							
	Requesting F	rovider							
9 - Medical Director	Request Issu	e Date		Self D	eemed	Add Receipt	Issue D	efer	Cancel

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.

🐮 Jennifer S Andrews	s - 52 - Accounts					
Patient Details					nationt	aaaaumta
Referrals					patient	uccounts
Accounts						
Notes	Practitioner	Class	Issued To	Acct Ref	Balance	Status
Correspondence	Dr Bevan Ayers - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	7	64.30	
Bookings						
Recalls						
Estimates						
ImageLite						
	Open existing account					
F3 - SMS Message						
	Create new account					
F9 - Medical Director				Total	Balance	64 30
	Print labels					0
						//.

- 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

🎨 David J Anderson -	49 - New Receipt					- • •
Patient Details	New receipt					and a single
Referrals						receipt
Accounts	Payment method					
HICO Bulk Bill (GK-C	Туре	Name	Bank/Card	Branch/Details	Amount	Eftpos Status
New Receipt						
DS MBP (DS)						
Private (BA-CN)					г	
Notes				Tota	Received	0.00
Correspondence					Ļ	
Bookings						
Recalls	Allocations					
Estimates	Pract Patier	nt Service Da	te Item To	tal Fee Owing	Allo	cate
ImageLite						
	1					
	Add items	repayment <u>O</u> verpay	ment			
F3 - SMS Message						
F9 - Medical Director	Message		Custom		Issue	<u>C</u> ancel
						1.

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.



C David Anderson -	49 - Ne New re	w Receipt									- • • ×
Accounts Private (BA-CN) New Receipt	Payme Cash	nt method Type	Mr David A	Name nderson	2	Bank	:/Card	Branch/D	etails /	Amount 614.95	Eftpos Status N/A
Notes Correspondence Bookings Recalls	Allocat	ions	nt	Service Date	Item	Total Fee	Gan	Discount	Total Rece	eived	614.95
Estimates ImageLite	BA BA BA	Anderson, Davi Anderson, Davi Anderson, Davi	id Priv id Priv id Priv	14/11/2012 14/11/2012 14/11/2012	23 43005 43017	38.55 482.55 93.85			38.55 482.55 93.85		38.55 482.55 93.85
F3 - SM5 Message F9 - Medical Director	Add	įtems <u>P</u> r essage	repayment.	<u>O</u> verpa	yment Cyston	] 			Issu	ie l	<u>C</u> ancel

12. Click 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.

🚯 David J Anderson	- 49 - Private (E	BA-CN)								
Patient Details Referrals		Show recor	ds for: All	•	From: 14/	02/2011	To: 14/0	2/2011	Shov	v audit trail
Accounts	Invoices Red	ceipts Refun	ds History   Wri	ite offs Histo	ry Account	Debtors Accour	nt Credits			
DS MBP (DS)	Issue Date	Receipt No.	Transaction Ty	pe Revers	ed Amount	Allocation Pay	ment Cre	dit Payment	Discount	
Private (BA-CN)	14/02/2011	3	Receipt		2877.8	5 28	77.85	0.00	0.00	
Notes										
Bookings Recalls	Details: Pay	ment methods	▼ R	everse Cred	t Allocation	Refund Allocat	ion Paymen	nt New <u>R</u> ec	ceipt	Open
Estimates ImageLite	Payment met	hods								
	Payment Met	thod Name		Bank/Card	Details	Banking Slip No.	Amount			
	Credit Card	Mr Davi	d Anderson	Visa	StGeorge		1000.00			
	AMEX	Mr Davi	d J Anderson				1000.00			
	EFTPOS Man	ual Mr Davi	d J Anderson	Bankcard			800.00	_		
	Cash	Mr Davi	d J Anderson				77.85			
	<u> </u>									
F3 - SMS Message	Show reve	ersals De	ebtors Balanc	e:	0.00 Cre	dits Balance:	0.0	0 Balano	ce:	0.00
F9 - Medical Director				_	_		_	_		
					A	ccount Transactio	n Listing	Account Det	ails	Close

3. Click New Receipt The New Receipt window appears.



#### MedicalDirector Blue Chip User Guide

Patient Details Referrals	New re Pa <u>y</u> me	eceipt Int method									receipt
Accounts		Туре		Name	2	Ban	k/Card	Branch/D	etails A	mount	Eftpos Status
Private (BA-UN)	Cash		Mr David A	nderson						614.95	N/A
New Receipt											
Notes	· · · · ·										
Correspondence									T-1-1 D	a second	614.95
Bookings	All								TOTAL RECE	ived	014.33
Recalls	Allocat										
Estimates	Pract	Patier	nt	Service Date	Item	Total Fee	Gap	Discount	Owing	A	Allocate
Imagel ite	BA	Anderson, Dav	id Priv	14/11/2012	23	38.55			38.55	<b>V</b>	38.55
magozito	BA	Anderson, Dav	id Priv	14/11/2012	43005	482.55			482.55	<b>V</b>	482.55
	BA	Anderson, Dav	id Priv	14/11/2012	43017	93.85			93.85	1	93.85
F3 - SMS Message F9 - Medical Director	Add	items P	repayment.	<u>O</u> verpa	yment Custom	] 			<u>I</u> ssu	e	<u>C</u> ancel

- 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.

Select Invoice	ltems					~?	
Patient Detail	s						
Anderson, David J,	Mr						
61 Wallace Street						<u>C</u> hang	e
MELBOURNE VIC 3							
Outstanding	Items						
Account: D	r Bevan Ayers	s - Crows Ne	st (Priv): Balance \$2877.85				-
Service Date	Invoice No	Item	Description	Fee	Discount	Owing	
11/02/2011	41	49530	Knee, total replacement arthroplast	2306.25		2306.25	<b>v</b>
11/02/2011	41	49539	Knee, reconstructive surgery of cru	499.20		499.20	<ul><li>✓</li></ul>
11/02/2011	41	49558	Knee, arthroscopic surgery of, invol	72.40		72.40	<b>V</b>
Ľ.						_	
					OK	Car	ncel

6. Click <u>Change...</u> 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.

Select Invoice Items	x
Patient Details	
Andrews, Jennifer S, Ms	
2 Kennedy Road Change	
DACEYVILLE NSW 2032	<b></b>
Outstanding Items	
Account: Dr Bevan Ayers - Crows Nest (HBB): Balance \$64.30	]
Service Date Invoice No Item Description Fee Discount Owing	
21/03/2007 11 104 Initial Consultation 64.30 64.30	Ī
OK Cancel	

- 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 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



#### MedicalDirector Blue Chip User Guide

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.

Waiting Room Banking Banking Backnes       Claim Selection:         From Date:       14/11/2013         Medicare Australia       Payee Rooms:         WP Deferred Printing WP Review Recals       To Date:         Waiting List MD Billing       Claim Type:         All       ▼         Date       Claim Type:         All       ▼         Exclude Finalised Claims       Reom         Vouchers       Total         Status       28/11/2013         A0002@*       Bulk Bill         Dr Bevan Ayers - Crows       2         128.60       Awaiting Authorisation         28/11/2013       A0002@*         Bulk Bill       Dr Bevan Ayers - Crows       2         128.60       Awaiting Authorisation         28/11/2013       A0002@*         Bulk Bill       Dr Bevan Ayers - Crows       3         967.65       Awaiting Process Report	Medicare Australia     Today's Patients     Appointment Book					М	edicare	Austra	lia - Online Cla	ims
Image: Second	Waiting Room Banking Bank Transfers Batches Medicare Australia WP Deferred Printing WP Review	Claim Selecti From Date: To Date: Claim Type:	on: 14/11/2013 28/11/2013 All	3 📠 3 📠	Payee Rooms:	☑ Dr Bevan Ayer ☑ Dr Grant Kong	rs - Crows N - Crows Ne	lest (212236 st (2122371/	1B) A)	
MD Billing Date Claim TD Claim Type Room Vouchers Total Status 28/11/2013 A0002@* Bulk Bill Dr Bevan Ayers - Crows 2 128.60 Awaiting Authorisation 28/11/2013 A0001@ Bulk Bill Dr Bevan Ayers - Crows 3 967.65 Awaiting Process Report New Open Delete Transmit Reserve Loss Loss Loss Loss Loss Loss Loss Los	Recalls Waiting List	Exclude F	inalised Clai	ims					<u>R</u> efree	ih
	MD Billing	Date 28/11/2013 28/11/2013	Claim ID A0002@* A0001@	Claim Type Bulk Bill Bulk Bill	Dr Bevan Dr Bevan	Room Ayers - Crows Ayers - Crows	Vouchers 2 3	Total 128.60 967.65	Status Awaiting Authorisation Awaiting Process Report	
Tear The second		<u>N</u> ew	<u>Oper</u>	ı <u>D</u> i	elete	Transmit	Rejected	Regeip	ji	Updat

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

The View Medicare Australia Claim window appears.

View Medicare /	Australi	a Claim								<u> </u>
Claim Details: -										
Claim ID:	AC	001@					Cl	aim Date:	28	Nov 2013
Claim Type:	В	ulk Bill		-			Cl	aim Total:		\$967.65
Payee Room:	D	r Bevan Aye	rs - Crows N	lest (21223	61B)		<ul> <li>Au</li> </ul>	ithorised Date:	28	Nov 2013
Practitioner/Lo	icum: D	r Bevan Aye	rs (2122361	B)			👻 Su	ibmitted Date:	28	Nov 2013
Service Type:	S	pecialist		•			Be	eceipted Date:	Not	Receipted
Service Locatio	on: 🖸									
		ut of Hospita	al	•						
- Invoice Selecti	tion:	ut of Hospita	al	<b>▼</b>						
Invoice Selecti Available Invoid	tion:	ut of Hospita	l View Inv	• oice Items		Selected Invo	ices (Max	=80): 3 1	View Inv	oice Items
- Invoice Selecti Available Invoid Date	tion: ices: Inv No	ut of Hospita	l View Inv tient	▼ oice Items Amount		Selected Invo	ices (Max Inv No	=80): 3 \ Patier	View Inv	oice Items Amount
Available Invoid	tion: ices: Inv No	ut of Hospita	View Invi tient	oice Items Amount	>	Selected Invo Date 28/11/2013	ices (Max Inv No 42	=80): 3 N Patier Anderson, Da	View Invo nt avid	oice Items Amount 127.35
Available Invoic	tion: ices: Inv No	Pa	View Invi	oice Items Amount	>	Selected Invo Date 28/11/2013 28/11/2013 28/11/2013	ices (Max Inv No 42 43 41	=80): 3 Patier Anderson, Da Anderson, Pei	View Inve nt avid enny	oice Items Amount 127.35 250.00 590.30
Invoice Select Available Invoid Date	tion: ices: Inv No	Pa	View Invi	oice Items Amount	>	Selected Invo Date 28/11/2013 28/11/2013 28/11/2013	ices (Max Inv No 42 43 41	-80): 3 Patier Anderson, Da Anderson, Pe Frankie, Alfon	View Invent nt avid enny 150	Dice Items Amount 127.35 250.00 590.30
- Invoice Select Available Invoir Date	tion: ices: Inv No	Pa	View Invo tient	oice Items Amount	>	Selected Invo Date 28/11/2013 28/11/2013 28/11/2013	ices (Max: Inv No 42 43 41	=80): 3 Patier Anderson, Da Anderson, Pet Frankie, Alfon	View Inve nt avid enny 1so	oice Items Amount 127.35 250.00 590.30
Available Invoic Available Invoi	tion: ices: Inv No	Pa	View Invi tient	oice Items Amount	>	Selected Invo Date 28/11/2013 28/11/2013 28/11/2013	ices (Max Inv No 42 43 41	-80): 3 Patier Anderson, Da Anderson, Pe Frankie, Alfon	View Invi nt avid enny 1so	bice Items Amount 127.35 250.00 590.30
Available Invoi Date	tion: ices: Inv No	Pa	View Invi	cice Items Amount	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Selected Invo Date 28/11/2013 28/11/2013 28/11/2013	ices (Max Inv No 42 43 41	=80): 3 Patier Anderson, Da Anderson, Pe Frankie, Alfon	View Invi nt avid mny 1so	bice Items Amount 127.35 250.00 590.30
Available Invoi Date	tion: ices: Inv No	Pa	View Invi	Amount	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Selected Invo Date 28/11/2013 28/11/2013 28/11/2013	ices (Maxi Inv No 42 43 41	=80): 3 Patier Anderson, Da Anderson, Pe Frankie, Alfon	View Invi nt avid enny iso	oice Items Amount 127.35 250.00 590.30
Invoice Select Available Invoi Date	tion: ices: Inv No	Pa	View Inv	cice Items Amount	>> <<	Selected Invo Date 28/11/2013 28/11/2013 28/11/2013	ices (Max Inv No 42 43 41	-80): 3 Patier Anderson, Da Anderson, Pe Frankie, Alfon	View Invi nt avid enny 1so	Dice Items Amount 127.35 250.00 590.30

3. Click Manual Receipting



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

🚯 David Anderson - 49 - New	/ Multi I	Patient Receipt									_	
Patient Details	New re	eceipt								Multi	Patie	nt Receipt
Referrals	Claim I	D:A0001@								TATULL	1 unior	n necept
Accounts	Payme	Turne				Mana			Park/Care	d Dranch	Detaile	Amount
MA Unline Bulk Bill (BA-UN)	Direct	t Debit				Name			Ddrik/Cdru	Dranch	Details	Amount
New Multi Fatient Necelpt	Direct	Debit										0.00
Notes												
Deskines												
Bookings Decella	I											
Fedinates											. [	0.00
E sumates									Т	otal Recei	ved	0.00
imageLite	Allocat	ions									_	
	Pract	Patient		Service Date	Invoice	Item	Total Fee	Owing	Receip	t Allocation	Option	Difference
	BA	Anderson, Penny	MABB	28/11/2013	43	23	32.10	32.	10	0.00		
	BA	Anderson, Penny	MABB	28/11/2013	43	104	75.60	75.	60	0.00		
	BA	Anderson, Penny	MABB	28/11/2013	43	33	32.10	32.	10	0.00		
	BA	Anderson, Penny	MABB	28/11/2013	43	332	110.20	110.	20	0.00		
	BA	Anderson, David	MABB	28/11/2013	42	23	32.10	32.	10	0.00		
	BA	Anderson, David	MABB	28/11/2013	42	105	37.95	37.	95	0.00		
	BA	Anderson, David	MABB	28/11/2013	42	59971	57.30	57.	30	0.00		
	DA DA	Frankle, Alfonso	MADD	28/11/2013	41	104	32.10	32.		0.00		
E3 - SMS Message	BA	Frankie Alfonso	MARR	28/11/2013	41	43014	482.60	482	60 0	0.00		
	100	ritariac, Anonao	PIADO	20/11/2013	1.7	10011	102.00	1021		0.00		
F9 - Medical Director		items Pre		<u>O</u> verpa	yment							<u>C</u> ancel
	_											

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

David Anderson - 49 - New Patient Details	Multi I	Patient Receipt	t							_	
Referrals	Claim I	D : A0001@								Multi Patier	t Receipt
Accounts	Payme	nt method									
MA Online Bulk Bill (BA-CN)		Туре				Name			Bank/Card	Branch/Details	Amount
New Multi Patient Receipt	Chequ	ue	David Ande	erson					CBA	MEL	129.00
Notes	Cash		Penny And	erson							250.00
Correspondence	AMEX		Alfonso Fra	ankie					NAB	MEL	592.00
Bookings											
Recalls											
Estimates									Tot	al Received	971.00
ImageLite	Allocat	ions									
	Pract	Dation	at	Service Date	Invoice	Item	Total Fee	Owing	Peceint Allocat	on Option	Difference
	BA	Anderson, Pen	ny MABB	28/11/2013	43	23	32,10	32,10	32	10 Accept	Difference
	BA	Anderson, Pen	ny MABB	28/11/2013	43	104	75.60	75.60	75	60 Accept	
	BA	Anderson, Pen	ny MABB	28/11/2013	43	33	32.10	32.10	32.	10 Accept	
	BA	Anderson, Pen	ny MABB	28/11/2013	43	332	110.20	110.20	110.	20 Accept	
	BA	Anderson, Dav	id MABB	28/11/2013	42	23	32.10	32.10	✓ 33.	00 Sundry Invoice	0.90
	BA	Anderson, Dav	id MABB	28/11/2013	42	105	37.95	37.95	✓ 38.	00 Sundry Invoice	0.05
	BA	Anderson, Dav	id MABB	28/11/2013	42	59971	57.30	57.30	✓ 58.	00 Sundry Invoice	0.70
	BA	Frankie, Alfons	o MABB	28/11/2013	41	23	32.10	32.10	✓ 33.	00 Sundry Invoice	0.90
E3 - SMS Message	BA	Frankie, Alfons	o MABB	28/11/2013	41	104	75.60	75.60	√ 76.	00 Sundry Invoice	0.40
	BA	Frankie, Alfons	o MABB	28/11/2013	41	43014	482.60	482.60	✓ 483.	00 Sundry Invoice	0.40
F9 - Medical Director	Add	items E		Overpa	yment					Issue	Cancel
									_		
											.4

- 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 \_\_\_\_\_\_ The **Issue Receipt** window appears.



#### MedicalDirector Blue Chip User Guide

Issue Receipt
Do you want to issue the receipt now?
Date of issue: 28/11/2013
OK Cancel

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

7. Click 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*.

Medicare Australia     Today's Patients     Appointment Book					М	edicare	Austra	💷 🔍 🗙
Waiting Room Banking Bank Transfers Batches Medicare Australia WP Deferred Printing WP Review Recalls Waiting List	Claim Selection From Date:	on: 14/11/201: 28/11/201: Bulk Bill nalised Clai	3 📻 3 📻 •	Payee Rooms:	✓ Dr Bevan Ayers - Crows Nest ✓ Dr Grant Kong - Crows Nest (		Refresh	
MD Billing	Date 🔻	Claim ID	Claim Type		Room	Vouchers	Total	Status
	28/11/2013	A0002@*	Bulk Bill	Dr Bevan	Ayers - Crows Nest (2122361B)	2	128.60	Awaiting Authorisation
	28/11/2013	A0001@	Bulk Bill	Dr Bevan	Ayers - Crows Nest (2122361B)	3	967.65	Finalised (Manually Receipted)
	<u>N</u> ew	Oper	1 De	elete	Transmit Rejected	Regeipt	Ŀ	g



## 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
- o Receipting part payments on surgical procedures (i.e. Medicare and Health Fund portion only)

Part payments can be made at the time of consultation (<u>Combined Invoice/Receipt</u>) 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.

🚯 David J Anderson -	49 - Accounts					
Patient Details						
Referrals					patient	accounts
Accounts						
HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from men	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Correspondence						
Bookings						
Recalls						
Estimates	1					
ImageLite	Open existing account					
E3 - SMS Message	open existing decount					
	Create new account					
F9 - Medical Director						2022.05
	Print labels			Total	Balance	2077.85
						//

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

😍 David J Anderson -	- 49 - Private (BA	A-CN)										
Patient Details Referrals		Show recor	ds for: All	-	From: 14	/02/2011	To: 14/0	02/2011	Show	w audit trail		
Accounts	Invoices Rece	voices Receipts Refunds History Write offs History Account Debtors Account Credits										
DS MBP (DS)	Issue Date R	eceipt No.	Transaction Ty	ype Revers	ed Amoun	t Allocation Pay	ment Cre	edit Payment	Discount			
Private (BA-CN)	14/02/2011 3	3 Receipt			2877.8	5 28	377.85	0.00	0.00			
Notes Correspondence												
Bookings Recalls	Details: Paym	ent methods	iods  Reverse Gredit Allocation Refund Allocation Payment N					nt New <u>R</u> ed	ceipt	Open		
Estimates ImageLite	Payment metho	ods										
	Payment Metho	od Name		Bank/Card Details		Banking Slip No.	Amount					
	Credit Card	Mr Davi	Mr David Anderson		StGeorge		1000.00	00.00				
	AMEX	Mr Davi	d J Anderson				1000.00	2				
	EFTPOS Manua	al Mr Davi	d J Anderson	Bankcard			800.00	נ				
	Cash	Mr Davi	d J Anderson				77.85	5				
	<u> </u>											
F3 - SMS Message	Show rever	sals De	ebtors Balanc	e:	0.00 Cre	edits Balance:	0.0	00 Balano	ce:	0.00		
F9 - Medical Director				_	_			_				
								Account Det	ails	Close		
										1/.		



4. Click New Receipt The New Receipt window appears.

Referrals Payr								receipt
Accounts Private (BA-CN)	ment method Type		Name	2	Bank/Card	Branch/Details	Amount	Eftpos Status
New Heceipt Notes Correspondence Bookings Alloc	cations					Total F	Received	0.00
Recalls Pra Estimates BA ImageLite BA BA BA BA	Anderson, Davie Anderson, Davie Anderson, Davie Anderson, Davie Anderson, Davie Anderson, Davie Anderson, Davie	t d Priv d Priv d Priv d Priv d Priv d Priv	Service Date 25/05/2012 25/05/2012 25/05/2012 25/05/2012 25/05/2012	Item 31515 23 49530 49539 49558	Total Fee 462.50 38.55 2096.60 998.35 289.45	Gap Dis	count Ow 4 20 9 2	Allocate           62.50           38.55           96.60           98.35           89.45
F3 - SMS Message A	Message	epayment.	<u>O</u> verpay	yment. Cust	• 9m		Issue	<u>C</u> ancel

- 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.

🕏 David Anderson -	49 - Ne	w Receipt										
Patient Details	New re	lew receipt receipt										
Referrals	Payme	Payment method										
Accounts		Туре	Name			Bank/Card Bi		nch/Details	Amount		Eftpos Status	
Private (BA-UN)	AMEX		David Ande	erson		CBA	BDB		3000.0	00	N/A	
New Receipt												
Notes									Г			
Bookings								Total I	Received		3000.00	
Becalls	Allocat	ions	- 1	Constant Data	Theres	Tables	0	Discourt	Quine	Alle	and to	
Estimates	Pract	Pate Anderson, Day	nt id Driv	Service Date	1tem	10tal Fee 462.50	Gap	Discount	0wing 462.50	Allo	462.50	
ImageLite	BA	Anderson, Dav	id Priv	25/05/2012	23	38.55			38.55	<u>⊻</u>	38.55	
	BA	Anderson, Day	id Priv	25/05/2012	49530	2096.60		H	2096.60		2096.60	
	BA	Anderson, Dav	id Priv	25/05/2012	49539	998.35			998.35	•	402.35	
	BA	Anderson, Dav	id Priv	25/05/2012	49558	289.45			289.45			
	1											
F3 - SMS Message	Add	litems P	repayment.	Overpa	yment							
E9 - Medical Director					-	<b>_</b>						
1 5 Theulear Director	- M	essage				floor.			Issue		Cancel	
	_		_		_		_			_		

11. Click 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.



#### **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.

🚯 David J Anderson	- 49 - Accounts					
Patient Details					natient	accounts
Accounts					Puttone	accounte
HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Correspondence						
Bookings						
Recalls						
Estimates	1					
ImageLite	Open existing account					
F3 - SMS Message						
	Create new account					
F9 - Medical Director				Total	Balance	2877 85
	Print labels			- Court		201100
						//

- 3. Select the account and click \_\_\_\_\_\_ Select the Receipts tab.
- 4. Click New Receipt A new receipt is generated, ready for your input.

🚯 David Anderson -	49 - Ne	w Receipt							l	- • <b>x</b>
Patient Details	New re	eceipt								receipt
Referrals	Payme	nt method								-
Accounts		Туре		Name	2	Bank/Card	Bra	nch/Details	Amount	Eftpos Status
Private (BA-CN)										
New Receipt										
Notes	1									
Correspondence								Total	Deceived	n
Bookings	All							Totari	Leceiveu	0.00
Recalls	Allocat	Jons De Kr	-	Consider Data	These	Table	C	Discourse	Quine	Allerente
Estimates	Pract	Pate Anderes Da	int Maint Data	Service Date	Item	Iotal ree	Gap	Discount	Owing	Allocate
ImageLite	BA	Anderson, Day	/IC PTIV	14/11/2012	23 4200E	30.33			30.33	님
	DA PA	Anderson, Day	/IC PTIV	14/11/2012	42017	462.33		H	462.33	님
	DA	Anderson, Day		14/11/2012	43017	95.05			90.00	
ES - SMS Message	1 m									
	Add	items F	repayment.	Overpa	vment					
F9 - Medical Director			//		,	J .				
	E Me	assage		-	Custon	lese -			Issue	<u>C</u> ancel

5. On the Receipt window, click <u>Overpayment</u>... The **Overpayment** window appears.

E	Overpayment	? ×
	Patient Details Anderson, David, Mr 61 Walker Street MELBOURNE VIC 3000 Allocation	<u>C</u> hange
	Account: Account Dr Bevan Ayers - Crows Nest (Priv)	Balance 1229.90
	A <u>m</u> ount:	
		OK Cancel



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

Patient Details	New re	eceipt									receipt	
Referrals	Payme	ent method									-	
Accounts		Туре		Name	2	Bank/Card	Bra	nch/Details	Amount	Eft	oos Status	
Private (BA-CN)												
New Receipt												
Notes	1								_			
Correspondence								Total	lacoivad		0.00	
Bookings								Totali	ceceiveu		0.00	
Recalls	Allocat	tions					-					
Estimates	Pract	Patient		Service Date	Item	Total Fee	Gap	Discount	Owing	Alloca	te	
ImageLite	BA	Anderson, David	Priv	14/11/2012	23	38.55			38.55			
	BA	Anderson, David	Priv	14/11/2012	43005	482.55			482.55			
	BA	Anderson, David	Priv	14/11/2012	43017	93.85			93.85			
	BA	Anderson, David	Priv		Overp					<b>v</b>	700.00	
F3 - SMS Message	Add	l įtems <u>P</u> re	payment.	<u>O</u> verpa	yment C <u>u</u> stor	bor 1			Issue	<u>C</u> a	ancel	

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.

🎨 David Anderson -	49 - Private (BA-CN)											
Patient Details Referrals	Show records for: All  From: 14/11/2012 To: 14/11/2012 Show audit trail											
Accounts	nvoices Receipts Refunds History Write offs History Account Debtors Account Credits											
Private (BA-CN)	Issue Date Transaction No. Transaction Type Reversed Amount Running Balance											
Correspondence	14/11/2012 15 Receipt 700.00 700.00											
Bookings												
Recalls	Reverse Credit Allocation Allocate Refund Credit Payment											
Estimates												
ImageLite	Details											
	Credit Type Amount											
	Overpayment 700.00											
F3 - SMS Message	Show reversals Debtors Balance: 614.95 Credits Balance: 700.00 Balance: (85.05)											
F9 - Medical Director	Account Transaction Listing Account Details Close											
	h.											

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.

😍 David Anderson -	49 - Ne	w Receipt							(	
Patient Details	New re	eceipt								receipt
Referrals	Pa <u>y</u> me	nt method								
Accounts		Type		Name	2	Bank/Card	Bra	nch/Details	Amount	Eftpos Status
Private (BA-CN)										
New Receipt							-			-
Notes	I									
Correspondence									[	0.00
Bookinas								Total	Received	0.00
Becalls	Allocat	ions							1	
Estimates	Pract	Patie	nt	Service Date	Item	Total Fee	Gap	Discount	Owing	Allocate
Imagel ite	BA	Anderson, Dav	id Priv	14/11/2012	23	38.55			38.55	
magerite	BA	Anderson, Dav	id Priv	14/11/2012	43005	482.55			482.55	
	BA	Anderson, Dav	id Priv	14/11/2012	43017	93.85			93.85	
F3 - SMS Message						1				
	Add	items P	repayment.	<u>O</u> verpa	yment					
F9 - Medical Director										
	📃 Me	essage		-		li			Issue	<u>C</u> ancel
	_		_		_		_	_		

- 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.

💷 Prepayment	? 🗙
Patient Details	
Anderson, David J, Mr	
61 Wallace Street	Change
MELBOURNE VIC 3000	
Allocation	
Account:	
Account	Balance
Dr Grant Kong - Crows Nest (HBB)	360.00
Amount:	
	<u>OK</u> Cancel

- 7. Enter the amount that you wish to allocate to prepayment in the associated text box.
- 8. Click \_\_\_\_\_ 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.

🎨 David Anderson -	49 - New Invoice			
Patient Details	Practitioner: Dr Bevan	Ayers - Crows Nest		include a second
Accounts	MD <u>B</u> illing: (None)		<b>_</b>	invoice
Private (BA-CN)	Date Item	Fee Discount	Item Description	Gap Total
New Invoice	25/11/2013 34521	837.60 50.00 Intra	a-abdominal artery or vein, cannulation	of, for infusion 837.60 837.60
Notes	25/11/2013			
Bookings	J			
Recalls	🔲 Multiple procedure	📃 View GST Details		Sub total 837.60
Estimates	V Discount	10%	Custom	+ GST 0.00
ImageLite			- Custors	Balance 837.60
	invoice message			
	Provided by locum		<b></b>	Gap total 837.60
	Hospital services			
	Distance Travelled (km)			
	DVA White Card Text			
F3 - SMS Message	Requesting Provider			
F9 - Medical Director	Request Issue Date	Self	Deemed Add Receipt	ssue <u>D</u> efer <u>C</u> ancel
				h

- 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 predefined 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 <u>Custom</u> 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
	Duplic	ate TAX	INV	DICE
Services         Performed           25/05/2012         34521           25/05/2012         23           25/05/2012         24	Provided by: Dr Bevan Ayers, 2122381B	Fee 837.60 38.55	GST 0.00 0.00	Fee Total 837.60 38.55
A discount of \$50.00 will be granted is received by 1/06/2012.	if the discounted total (\$878.50)	52.35	0.00	52.35
	INVOICE TOTAL:	928.50	0.00	928.50
	BALANCE OF	ACCOUNT:		967.05
Patient Mr David Anderson		Medicare No + ID		0

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.

🚯 David J Anderson -	- 49 - Accounts					
Patient Details						
Referrals					patient	accounts
Accounts						
HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Correspondence						
Bookings						
Recalls						
Estimates	1					
ImageLite	Open existing account					
F3 - SMS Message						
	Create new account					
F9 - Medical Director				Total	Ralanca	2877.85
	Print labels			Totan	balance	2011.03
						11.

- 3. Select the account and click \_\_\_\_\_\_ 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.

Patient Details Referrals	Receipt Issued	15 by Mr Edv	ward Carstairs	15/11/2012	8:36 am			vier	v receipt
Accounts Drivete (DA CN)	Paymer	nt type	Paid by		Branch/card type	Details	Amo	un va	w backing
Private (BA-CN)	Cash		Mr David And	derson			614	.9	ew ganking
Notes Correspondence Bookings								<u>A</u> dj	ust/Reverse licate receipt
Recalls	Paid to:								
E stimates	Pract	Patient		Service date	Item	Description	Т	ype	Amt Paid
mayound	BA	Anderso	n, David, Mr	15/11/2012	23 [Inv 41]	Professional atte	enda.		38.55
	BA	Anderso	n, David, Mr	15/11/2012	43005 [Inv 41]	Photodynamyic	ther.		482.55
F3 - SMS Message	BA	Anderso	n, David, Mr	15/11/2012	43017 [Inv 41]	Infusion of verte	epor		93.85
F9 - Medical Director	View	invoice	Qlose	2		R	eceipt t	otal	614.95

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

Adjust / Reverse Receipt	8 X
Adjust the receipt	ОК
○ Reverse the receipt	Cancel
Reversal date: 15/11/2012	
Enter Reason: Incorrect payment type entered	

- 7. Enter a reason for the adjustment, and then click 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.

Patient Details Referrals	New re	eceipt									receipt
Private (BA-CN)	- ayine	Type		Na	ne		Bank/Card	Branch/De	etails A	mount	Eftpos Status
Adjust receipt 15	Cash	.,,,,,,	-	Mr David Anderson			Danny Card			614.95	N/A
Notes	AMEX	(									
Correspondence	Cash										
Bookings	Coller	ue ctor Fee	=								
Recalls	Credi	it Card	-							_	
Estimates	Debt	Collection						1	Total Rece	ived	614.95
ImageLite	Diner	s Card	_								
	Direc	t Debit									
	Allocat	tions									
	Pract	P	Patien	t	Service Date	Item	Total Fee	Discount	Owing	A	llocate
	BA	Anderson,	Davi	d Priv	21/03/2014	23	38.55		38.55		38.55
	BA	Anderson,	Davi	d Priv	21/03/2014	43005	482.55		482.55		482.55
	BA	Anderson,	Davi	d Priv	21/03/2014	43017	93.85		93.85	<b>V</b>	93.85
	-										
F3 - SMS Message	Add	l įtems	Pr	epayment Overp	ayment						
TO ALL DOLLAR		-	_								
E9 - MODICAL DEPOSTOR									Iccu	.	Cancel
F9 - Medical Director	M								ISSU	C	Cancer
F9 - Medical Director	M	lessage			) egessiinii	·					_



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



10. Click 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.

🎨 David Anderson - 4	49 - Private (B	A-CN)										x
Patient Details Referrals		Show	records for: All		-	From: 1	5/11/2012	Т	15/11/	2012	Show audit tra	ail
Accounts	Invoices Re	eceipts p	Refunds History	Nrite offs I	History	Accour	t Debtors	Account (	Credits			
Private (BA-CN) Notes	Issue Date	Receipt	Transaction Type	e Rev	erse	Amount	Allocation	Credit	Discount	User	Entry Time	R
Correspondence	15/11/2012	15	Receipt		/	614.95	614.95	0.00	0.00	EC	15/11/2012 8:36 am	(
Bookings Basella	15/11/2012	15	Receipt (reversa	0		(614.95)	(614.95)	0.00	0.00	EC	15/11/2012 9:13 am	R
Hecalls Estimates	15/11/2012	16	Receipt (adjustm	ent)		614.95	614.95	0.00	0.00	EC	15/11/2012 9:13 am	R
ImageLite	Details: Pa	yment me	thods 🔻	Reverse	Credit	Allocation	Refund	Allocation	Payment	New <u>R</u> e	eceipt Open	
	Payment me	thods										
	Payment Me	ethod Na	ame	Bank/Car	d De	etails B	anking Slip I	No. Amo	unt			
	Cheque	M	r David Anderson					6	14.95			
F3 - 5MS Message F9 - Medical Director	Show rev	versals	Debtors Bala	nce:	0	.00 Cr	edits Bala Account Tra	ince:	0.00 .isting A	Balan	tails Close	

Notice that the receipt now shows the adjustment;

- The original receipt reference is retained (on line 1), and shown as having been reversed.
- $\circ$   $\;$  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



# 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.

🐮 David J Anderson	- 49 - Accounts					
Patient Details Referrals					patient o	accounts
Accounts						
HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Correspondence						
Bookings						
Recalls						
Estimates	1					
ImageLite	Open existing account					
E3 - SMS Message	open existing decount					
- to ono neodyc	Create new account					
F9 - Medical Director				T-1-1		2077.05
	Print labels			Iotai	Balance	2077.05
					_	
						1.

- 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.

Accounts       Date       Item       Description       Fee       Amount         Private (BA-CN)       15/11/2012       23       Professional attendance at consulting rooms (not being a ser       38.55       38.5         Invoice 41       15/11/2012       43005       Photodynamyic therapy, one eye, for patients who commenc       482.55       482.5         Notes       Correspondence       Bookings       Multiple Procedure:       No       Sub total       614.95         Bescalls       Discount Message: <no message="">       + GST       0.00         Invoice Message:       <no message="">       Balance       614.95         F9 - Medical Director       Provided by:       D Bevan Ayers       614.95</no></no>	Cavid Anderson - Patient Details Referrals	49 - Invoice 41 Practitioner: D Invoice no: 4	r Bevan Ayı 1	ers - Crows Nes			view	v invoice
Private (BA-CN)       15/11/2012       23       Professional attendance at consulting rooms (not being a ser       38.55       38.5         Invoice 41       Notes       15/11/2012       43005       Photodynamyic therapy, one eye, for patients who commenc       482.55       482.55         Correspondence       Bookings       Multiple Procedure:       No       Sub total       614.95         Bookings       Invoice Message: <no message="">       + GST       0.00         Invoice Message:       <no message="">       + GST       0.00         Provided by:       Dr Bevan Ayers       614.95         F9 - Medical Director       Postial Name:       <ou hospital<="" of="" td="">       Amendments       Adjust       Print       Qiose</ou></no></no>	Accounts	Date	Item	Desc	ription		Fee	Amount
Invoice 41       15/11/2012       43005       Photodynamyic therapy, one eye, for patients who commenci       482.55       482.5         Notes       15/11/2012       43017       Infusion of verteporfin for discontinued photodynamic therapy.       93.85       93.85         Bookings       Multiple Procedure:       No       Sub total       614.95         Recalls       Discount Message: <no message="">       + GST       0.00         Invoice Message:       <no message="">       Balance       614.95         F3 - SMS/Message       Hospital Name:       <out hospital<="" of="" td="">       Amendments       Adjust       Print       Qiose</out></no></no>	Private (BA-CN)	15/11/2012	23	Professional attendar	nce at consulting roo	ms (not being a ser	38.55	38.55
Notes     15/11/2012     43017     Infusion of verteporfin for discontinued photodynamic therapy.     93.85     93.85       Bookings     Multiple Procedure:     No     Sub total     614.95       Recalls     Discount Message: <no message="">     + GST     0.00       ImageLite     Invoice Message:     <no message="">     Balance     614.95       F3 - SVS Message     Provided by:     Dr Bevan Ayers     614.95       F9 - Medical Director     Respital Name:     <out hospital="" of="">     Amendments     Adjust     Print     Close</out></no></no>	Invoice 41	15/11/2012	43005	Photodynamyic thera	py, one eye, for patie	ents who commence	482.55	482.55
Correspondence     I       Bookings     Multiple Procedure:     No       Recalls     Discount Message:     (No Message)       Estimates     Invoice Message:     (No Message)       ImageLite     Invoice Message:     (No Message)       F3 - SMS Message:     Provided by:     Dr Bevan Ayers       F9 - Medical Director     Researce     Clut of Hospital>	Notes	15/11/2012	43017	Infusion of verteporfir	n for discontinued ph	otodynamic therapy.	93.85	93.85
ImageLite         Invoice Message: <no message="">         Balance         614.99           F3 - SMS Message         Provided by:         Dr Bevan Ayers         614.99         614.99           F9 - Medical Director         Hospital Name:         <out hospital="" of="">         Amendments         Adjust         Print         Close</out></no>	Bookings Recalls Estimates	Multiple Proc Discount Me	edure: ssage:	No <no message=""></no>		Si	ub total + GST	614.95 0.00
F3 - 5M5 Message         Provided by:         Dr Bevan Ayers           F9 - Medical Director         Hospital Name: <out hospital="" of="">           F9 - Medical Director         Reference Research         Magendments           Amendments         Adjust         Print</out>	ImageLite	Invoice Mess	age:	<no message=""></no>		Ba	lance	614.95
F9 - Medical Director Beforeing Depleter No. Beforeing Amendments Adjust Print Close	E3 - SMS Message	Provided by:		Dr Bevan Ayers			-	
F9 - Medical Director Boferring Depters No Referral Amendments Adjust Print Ulose		Hospital Nam	ie:	<out hospital="" of=""></out>				
	F9 - Medical Director	Referring Do	ctor:	No Referral referral	Amendments	Adjust	Print	<u>U</u> lose



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

Adjust / Reverse Invoice	? X
Adjust the invoice	ОК
○ Reverse the invoice	Cancel
Reversal date: 15/11/2012	
Enter <u>R</u> eason: Incorrect Service Item Number entered	j

- 6. Enter a reason for adjusting the invoice. In this example it refers to the use of an incorrect Service Item Number.
- 7. Click You will be returned to the Invoice window where you can make the necessary adjustment(s).
- 8. Click \_\_\_\_\_\_ The Issue Invoice window appears.
- 9. Click 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 to print/issue the invoice.
- 10. Select the Receipts tab. Select the receipt to adjust and click \_\_\_\_\_\_

Patient Details Referrals	Receipt Issued	Receipt 15 Issued by Mr Edward Carstains 15/11/2012 10:12 am							v receipt	
Accounts	Payment type		Paid by		Branch/card type	Details	Amour	Vie	aw banking	
Private (BA-CN)	Cash		Mr David Anderson				614.9		en ganning	
Receipt 15								Adi	ust/Reverse	
lotes								297	asquererse	
orrespondence	10							Dup	Duplicate receipt	
ookings								_		
ookings tecalls	Paid to:									
ookings iecalls stimates	Paid to:	Patient		Service date	Item	Description	Typ		Amt Paid	
ookings ecalls stimates nageLite	Paid to: Pract BA	Patient	n, David, Mr	Service date 15/11/2012	Item Prepayment	Description	Тур		Amt Paid 38.55	
ookings ecalls stimates nageLite	Paid to: Pract BA BA	Patient Anderso Anderso	n, David, Mr n, David, Mr	Service date 15/11/2012 15/11/2012	Item Prepayment Prepayment	Description	Тур		Amt Paid 38.55 482.55	
ookings lecalls stimates nageLite 10 - 51/5 Message	Paid to: Pract BA BA BA	Patient Anderso Anderso Anderso	n, David, Mr n, David, Mr n, David, Mr	Service date 15/11/2012 15/11/2012 15/11/2012	Item Prepayment Prepayment Prepayment	Description	Тур		Amt Paid 38.55 482.55 93.85	
ookings ecalls stimates nageLite => ===================================	Paid to: Pract BA BA BA	Patient Anderso Anderso Anderso	n, David, Mr n, David, Mr n, David, Mr	Service date 15/11/2012 15/11/2012 15/11/2012	Item Prepayment Prepayment Prepayment	Description	Тур		Amt Paid 38.55 482.55 93.85	

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



- 12. Enter a reason for adjusting the receipt and then click
- 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 \_\_\_\_\_\_ and then \_\_\_\_\_. Print the receipt as normal.

16. Repay the patient the difference. Now the patient's Medical Director 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.

_							
	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.

Г					Account Credits	l
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.

🎨 David J Anderson -	49 - Accounts					
Patient Details						
Referrals					patient	accounts
Accounts						
HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Ayers - Crows Nest	Private	Patient	27	2877.85	
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Correspondence						
Bookings						
Recalls						
Estimates	1					
ImageLite	Open existing account					
F3 - SMS Message						
	Create new account					
F9 - Medical Director				Total	Balanca	2877.85
	Print labels			Totan	balance	2011.03

- 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 \_\_\_\_\_\_

Patient Details Referrals	Practitioner: Dr Invoice no: 41	Bevan Ay	ers - Crows Nes	view	invoice
Accounts	Date	Item	Description	Fee	Amount
Private (BA-CN)	15/11/2012	23	Professional attendance at consulting rooms (not being a s	er 38.55	38.55
Invoice 41	15/11/2012	43005	Photodynamyic therapy, one eye, for patients who commer	ici 482.55	482.55
Notes Correspondence	15/11/2012	43017	Infusion of verteporfin for discontinued photodynamic thera	ру. 93.85	93.85
Bookings Recalls Estimates	Multiple Proc Discount Mes	edure: isage:	No <no message=""></no>	Sub total + GST	614.95 0.00
ImageLite	Invoice Mess	age:	<no message=""></no>	Balance	614.95
P0 - SK9 Measage	Hospital Nam	e:	<out hospitab<="" of="" td=""><td></td><td></td></out>		
F9 - Medical Director	Referring Do	ctor:	No Referral referral Amendments Adjust/Reverse	Print	<u>C</u> lose

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





- 6. Enter a reason for the adjustment, and then click
- 7. When you are returned to the Invoice window, make the desired adjustment(s) to the invoice.
- 8. Click 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.

			Accoun	t Debtors	L					
Issue Date	Transaction No	o. 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			
•	•									
Details										
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.

🐮 David J Anderson -	- 49 - Accounts					
Patient Details Referrals					patient o	accounts
Accounts HICO Bulk Bill (GK-C	Practitioner	Class	Issued To	Acct Ref	Balance	Status
DS MBP (DS)	Dr Bevan Avers - Crows Nest	Private	Patient	27	2877.85	010100
Private (BA-CN)	. Day Surgery	DS MBP	Health Fund (from mer	28	0.00	
Notes	Dr Grant Kong - Crows Nest	HICO Bulk Bill	Medicare Australia Dire	29	0.00	
Correspondence		1				
Bookings						
Recalls						
Estimates	1					
ImageLite	Open existing account					
F3 - SMS Message	gren end ang decount					
	Create new account					
F9 - Medical Director				Total		2877.85
	Print labels			Totali	Jaiance	2011.05
						///

2. Select the account and click \_\_\_\_\_\_ You are presented with the details of the account.



3. Select the invoice you wish to adjust and click \_\_\_\_\_\_

C David Anderson - Patient Details Referrals Accounts	49 - Invoice 41 Practitioner: Dr B Invoice no: 41	levan Ay	ers - Crows Nest			view	invoice
Private (BA-CN)	Date	Item		Description		Fee	Amount
Invoice 41	15/11/2012	104	Initial Consultation			150.00	150.00
Notes Correspondence							
Bookings	Multiple Proced	dure:	No			Sub total	150.00
Estimates	Discount Messa	age:	<no message=""></no>			+ GST	0.00
F8 - SMS Message	Invoice Messag Provided by:	ge:	<no message=""> Dr Bevan Avers</no>			Balance	150.00
F9 - Medical Director	Hospital Name: Referring Docto	: or:	<out hospital="" of=""> No Referral referral</out>	Amendments	<u>A</u> djust/Reverse	Print	<u>C</u> lose

4. Click Adjust/Reverse Invoice window appears.

Adjust / Reverse Invoice	? <mark>x</mark>
Adjust the invoice	ОК
O Reverse the invoice	Cancel
Reversal date: 15/11/2012	
Enter Reason: Incorrect Service Item Number entered	_

- 5. Enter a reason for the adjustment, and then click \_\_\_\_\_\_
- 6. When you are returned to the invoice window, alter the data (in this example, Item 104 was changed to Item 105).
- 7. Click 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.

A	llocate Credit	Amounts						8 ×	
	Date	Receipt	Туре		Unallocated		Allocate	ОК	
	15/11/2012	1	.5 Prepaym	ent	150.00		0.00		
	Cancel								
	Payment amount available 0.00								
	Date	Item No	Fee		Discount		Allocate		
	15/11/2012	105	75.00		0.00		0.00		
	Total allocated								



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.

Date	Receipt	Туре	Unallocated	-	Allocate	OK		
15/11/2012	15	Prepayme	ent 150.00	) 🔽	75.00			
Cancel								
Payment amount available 75.00								
15/11/2012	105	75.00	0.00	<b>V</b>	75.00			
15/11/2012 105 75.00 □ 0.00 ♥ 75.00 Total allocated 75.00								

# 9. Click OK

10. Print the invoice.

11. Select the Account Credits tab.

🚯 David Anderson -	49 - Private (B	A-CN)						
Patient Details Referrals		Show records	for: All	▼ From:	15/11/20	12 To: 1	5/11/2012	Show audit trail
Accounts	Invoices Re	ceipts Refunds	History Write offs H	istory Aco	ount Debto	rs Account Credi	ts	
Notes	Issue Date	Transaction No.	Transaction Type	Reversed	Amount	Running Balance		
Correspondence	15/11/2012	15	Receipt		150.00	150.00		
Bookings Becalls	15/11/2012	16	Credit Allocation		(75.00)	75.00	1	
Estimates ImageLite	Reverse Credit Allocation Allocate/Refund Credit Payment							
	Details							
	Issue Date	Receipt No. 0	Credit Type Invoice	No. Servio	e Item A	llocation Amount	Discount	
	15/11/2012	15 P	Prepayment 42	105		75.00	0.00	
F3 - SVS Vessage F9 - Medical Director	Show rev	ersals Debi	tors Balance:	0.00	Credits E	talance: 7	5.00 Ba	alance: (75.00) t Details Close

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

A	llocate Credit	Amounts					8 ×		
	Date 15/11/2012	Receipt 15	Type Prepayment	Unallocated 75.00	V	Alloc 75.00	OK Cancel		
	Payment amount available 75.00								
	Date	Item No	Fee	Discount		Alloc			
				Total allocate	d	0.00			

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





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	. Transac	tion Type	Reversed	Amount	Running Balance	
15/11/2012	15	Receipt			150.00	150.00	
15/11/2012	16	Credit A	llocation		(75.00)	75.00	
15/11/2012	43	Refund			(75.00)	0.00	
Details		Rever	rse Credit A	location	Allocate/Re	efund Credit Paymer	nt
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	t 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.

		Refun	ds History							
Issue Date	Refund	d 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 Deta	ils									
Credit Type	Rece	ipt No.	Amount							
Prepayment	15		75.00							
I										



#### MedicalDirector Blue Chip User Guide

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.

F	eceipts											
Issue Date	Receipt No.	Transaction Type	Reversed	Amount	Allocation Payment	Credit Payment	Discount					
15/11/2012	5/11/2012 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	15/11/2012 15 Receipt 150.00 0.00 150.00 0.00											
15/11/2012	15/11/2012 16 Credit Allocation 75.00 75.00 0.00 0.00											
Details: C	Details:     Credit allocations     Reverse Credit Allocation     Refund Allocation Payment     New Receipt     Open											
Issue Date	Issue Date Receipt No. Credit Type Invoice No. Service Item Allocation Amount Discount											
15/11/201	15/11/2012 15 Prepayment 42 105 75.00 0.00											
L												

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

Invoices												
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			$\Box$		
15/11/2012	41	Invoice (reversal)		104			(150.00)			$\Box$		
15/11/2012	42	Invoice (adjustment)		105			75.00	75.00		$\Box$		
•										Þ		
	New <u>I</u> nvoice <u>O</u> pen <u>W</u> rite off											

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.

ſ	🏦 King Ayer P	ty Ltd - Refun	ds								
	Bank deposit								accour	nt re	funds
	EFTPOS Acet History		Show record	ls for: Curren	t Month 🔻 From	n: 16/11/2012	To:	16/11/2	2012	Show	audit trail
	Refunds	Tanua Data	Defined No.	Defined Time	Transation Trans	Dationat	Deversed	American	Defined Method	Lines	Fabry To
		Issue Date	Retund No	Retund Type	Transaction Type	Patient	Reversed	Amount	Refund Method	User	Entry III
		16/11/2012	43	Credit	Refund	David Anderson		75.00	cash	EC	16/11/2
		•									P.
		Show reve	ersals								
										_	.iti.



г

# 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.

🚯 David Anderson -	49 - Private (BA-CN)								
Patient Details Referrals	Show records for: All  From: 16/11/2012  To: 16/11/2012  Show audit trail								
Accounts	Invoices Receipts Refunds History Write offs History Account Debtors Account Credits								
Notes	Issue Date Transaction No. Transaction Type Reversed Amount Running Balance								
Correspondence	16/11/2012 17 Receipt 200.00 200.00								
Bookings Recalls Estimates	Reverse Credit Allocation Allocate/Refund Credit Payment								
ImageLite	Details								
	Credit Type     Amount       Prepayment     200.00								
F3 - SMS Message	Show reversals Debtors Balance: 0.00 Credits Balance: 200.00 Balance: (200.00)								
F9 - Medical Director	Account Transaction Listing Account Details Close								

4. Click Allocate/Refund Credit Payment

A	llocate Credit	Amounts					? ×				
	Date	Receipt	Туре	Unallocated		Alloc	ok				
	16/11/2012	/11/2012 17 Prepayment 200.00 🖌 200.00									
							<u>R</u> efund				
			Payment a	amount available	e [	200.00	)				
	Date	Item No	Fee	Discount		Alloc					
				Total allocate	d	0.00	]				

5. Click <u>Refund</u>... The **Refund** window appears.

Refund		? <mark>x</mark>
Total pre	epayments available:200.00	ОК
Refund	200.00	Cancel
Reason	Patient changed their mind	
Method	Practice cheque	

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



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

Patient Details		Show records for: All From: 16/11/2012 To: 16/11/2012 Show audit trail										
Referrals		Show records f	or: All	From:	16/11/201	2 <b>To:</b> 16/	11/2012 Show audit trai					
Accounts	Invoices Re	ceipts Refunds H	listory   Write offs H	listory Aco	ount Debtor	s Account Credits						
Private (BA-UN) Notes	Issue Date	e Date Transaction No. Transaction Type Reversed Amount Running Balance										
Correspondence	16/11/2012	17	Receipt		200.00	200.00						
Bookings	16/11/2012	44	Refund		(200.00)	0.00						
Estimates ImageLite		Reverse Credit Alocator. Alocate/Refund Credit Payment										
	Details											
	Credit Type         Receipt No.         Amount           Prepayment         17         200.00											
F3 - SMS Message F9 - Medical Director	Show rev	ersals Debto	ors Balance:	0.00	Credits B Account	alance: 0. Transaction Listing	00 Balance: 0.00 Account Details Close					

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

	Ref	unds History								
Issue Date	Refund No.	Refund Type	Transaction Type	Reversed	Amount	Refund Method	User	Entry Time		
16/11/2012	43	Credit	Refund		75.00 cash		EC	16/11/2012 8:53 am		
16/11/2012	11/2012 44 Credit Refund 200.00 Practice cheque EC 16/11/2012 10:22 am									
•	•									
								Reverse		
Refund Deta	ils									
Credit Type	Credit Type Receipt No. Amount									
Prepayment	17	200.00								

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

Re	ceipts											
Issue Date	Receipt No.	Transaction T	Type Reve	rsed Am	ount	Allocation Payment		Credit Payment	Discount			
16/11/2012	17	Receipt		200	0.00		0.00	0.00 200.00				
Details:         Payment methods         Reverse Gredit Allocation         Refund Allocation Payment         New Receipt         Open												
Payment met	hods											
Payment Me	Payment Method Name Bank/Card Details Banking Slip No. Amount											
Cash	Mr Davi	d Anderson					200.00	)				
1												

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.

🏦 King Ayer	Pty Ltd - Refun	ds						_		×
Bank deposit								account	refu	nds
EFTPOS		Show records t	for: Current M	Ionth Trom:	16/11/2012	To:	16/11/201	2 <b>V</b> sh	ow aud	lit trail
Acct History					1					
neiunus	Issue Date	Refund No	Refund Type	Transaction Type	Patient	Reversed	Amount	Refund Method	User	Entr
	16/11/2012	44	Credit	Refund	David Anderson		200.00	Practice cheque	EC	16/1
										-
	Show rev	ersals								
										-11



# 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.

C David Anderson - 4	49 - Private (B	A-CN)							• 🔀		
Referrals		Show records for: All From: 16/11/2012 To: 16/11/2012 Show audit trail									
Accounts	Invoices Re	ices Receipts Refunds History Write offs History Account Debtors Account Credits									
Private (BA-CN) Notes	Issue Date	Invoice No.	Transaction Type	Reversed	Invoice Items	Batch ID	Sundry	Amount	Paid		
Correspondence	16/11/2012	41	Invoice		30061			24.90			
Bookings Recalls	•								•		
Estimates ImageLite					Ν	ew <u>I</u> nvoice	<u>O</u> pen	Wr	ite off		
F3 - SMS Message	Show rev	ersals De	ebtors Balance:	24.9	O Credits Balance:	0.00	Balance	:	24.90		
					Account Transaction	Listing Acc	count Detail	s C	lose		

3. Click Write off The Write Off window appears.

Write off					? <mark>X</mark>
Reason for writ	te off:				ОК
Patient moved	- cannot locat	e them.			
Date	Item No	Fee	Owing	Write-off	<u>C</u> ancel
16/11/2012	30061	24.90	24.90	24.90	
[]]					
			Total write of	24.90	

- 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.

Invoices										
Issue Date	Invoice No.	Transaction Type	Reversed	Invoice Items	Batch ID	Sundry	Amount	Paid	Write off	Disco
16/11/2012	41	Invoice		30061			24.90		24.90	
New <u>I</u> nvoice <u>O</u> pen <u>W</u> rite off										

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.

	Write offs History									
Issue Date	Writeoff No.	Invoice No.	Writeoff Type	Transaction Type	Reversed	Amount	User	Entry Time		
16/11/2012	15	41	Bad Debt	Write off		24.90	EC	16/11/2012 11:32 ar		
Writeoff Det     Service Item	ails							Reverse		
30061	24.90									



# 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

New Accour	t		? ×
Patient	David Anderson		ОК
Banked to	Practitioner Dr	B Ayers - CN 👻	Cancel
	Provider no. 212	22361B	
	Account St L	eonards	
<u>C</u> lass	MA Online BB	•	
Issue to	Medicare Australia	a Direct Bill 🔹 👻	
<u>A</u> ccount ref	28		

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.

Medicare Australia								- • •		
Today's Patients					М	edicare	Austra	lia - Online Claims		
Appointment Book	Claim Selecti	on:								
Waiting Room	From Date:	6/05/2012		Payee	Dr Bevan Ayers - Crows	Nest (21223	361B)			
Bank Transfers	To Date:			Rooms:	V Dr Katrine Ing - Derault (24090413) Dr Grant Kong - Crows Nest (2122371A)					
Batches	To Date:	20/11/2012			🗹 Dr Brenda Reed - Defau	lt (2054781\	N) (Deleted	)		
Medicare Australia	Claim Type:	All	•							
WP Deferred Printing WP Review	Exclude F	inalised Clai	ms					Refresh		
Becalls										
Waiting List	Date 🔻	Claim ID	Claim Type		Room	Vouchers	Total	Status		
MD Billing	21/05/2012	IMC00007	Eclipse	Dr Katrine	Ing - Default (24090413)	1	45.20	Awaiting Submission		
	21/05/2012	EA00006	Bulk Bill	Dr Katrine	Ing - Default (24090413)	2	519.90	Awaiting Process Report		
	21/05/2012	PC00005	Patient Claim	Dr Bevan	Ayers - Crows Nest (212	1	75.60	Pay Doctor via Claimant		
	15/05/2012	IMC00004	Eclipse	Dr Bevan	Ayers - Crows Nest (212	1	194.45	Awaiting Payment Report		
	14/05/2012	PC00003	Patient Claim	Dr Bevan	Ayers - Crows Nest (212	1	75.60	Successful		
	14/05/2012	IMC00002	Eclipse	Dr Bevan	Ayers - Crows Nest (212	1	866.50	Awaiting Process Report		
	<u>N</u> ew	Oper	D	elete	Iransmit Rejected	Reg	eipt	Log Updates		

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

ew Medicare Austr	alia Claim					
Claim Details:						
Claim ID:	New Claim			Cla	aim Date:	25 Nov 2013
Claim Type:	Bulk Bill 🔹			Cla	aim Total:	\$467.40
Payee Room:	Dr Bevan Ayers - Crows Nest (21	- Au	thorised Date:	Not Authorised		
Practitioner/Locum:	Dr Bevan Ayers (2122361B)	- Su	Ibmitted Date:	Not Submitted		
Service Type: Specialist   Receipted Date: Not Receipted						
Scivice Type.	Specialist •			He	eceipted Date:	Not neceipted
Service Location:	Out of Hospital			He	ceipted Date:	Nothecepted
Service Location:	Out of Hospital			ne	ceipted Date:	Not Heceipted
Service Location: Invoice Selection: - Available Invoices:	Dut of Hospital  View Invoice Ite	ms	Selected Invoi	ces (Max=	=ceipted Date: =80): 2 Vi	iew Invoice Items
Service Location: Invoice Selection: Available Invoices: Date Inv N	Out of Hospital      View Invoice Ite     Amou	ms nt	Selected Invoi	ces (Max=	=80): 2 Vi Patient	iew Invoice Items Amount
Service Location: Invoice Selection: Available Invoices: Date Inv M 21/03/2007 12	Specialist           Out of Hospital           View Invoice Ite           Io           Patient           Jones, Marianna-Louis           64.	ms nt	Selected Invoi Date 25/11/2013	ces (Max= Inv No 41	=80): 2 Vi Patient Anderson, Dav	iew Invoice Items Amount id 403.10
Service Location: Invoice Selection: Available Invoices: Date Inv N 21/03/2007 12	Specialist Ut of Hospital View Invoice Ite So Patient Jones, Marianna-Louis 64.	nt 30 >	Selected Invoi Date 25/11/2013 21/03/2007	ces (Max= Inv No 41 11	-80): 2 Vi Patient Anderson, Dav Andrews, Jenni	iew Invoice Items Amount id 403.10 ifer 64.30
Service Location: Invoice Selection: – Available Invoices: Date Inv 1 21/03/2007 12	Out of Hospital      View Invoice Ite     Anou     Jones, Marianna-Louis     64,	ms nt 30 >>	Selected Invoi Date 25/11/2013 21/03/2007	ces (Max- Inv No 41 11	-80): 2 Vi Patient Anderson, Dav Andrews, Jenni	iew Invoice Items Amount id 403.10 ifer 64.30
Service Location: Invoice Selection: – Available Invoices: Date Inv 1 21/03/2007 12	Specialist  Out of Hospital  View Invoice Ite View Invoice Ite Jones, Marianna-Louis  64.	nt 30 >> <	Selected Invoi Date 25/11/2013 21/03/2007	ces (Max= Inv No 41 11	-80): 2 Vi Patient Anderson, Dav Andrews, Jenni	iew Invoice Items Amount id 403.10 ifer 64.30
Service Location: Invoice Selection: - Available Invoices: Date Inv 1 21/03/2007 12	Specialist  Out of Hospital  View Invoice Ite View Invoice Ite Jones, Marianna-Louis  64.	nt 30 >> <	Selected Invoi Date 25/11/2013 21/03/2007	ces (Max= Inv No 41 11	-80): 2 Vi Patient Anderson, Dav Andrews, Jenni	iew Invoice Items Amount id 403.10 ifer 64.30
Service Location: Invoice Selection: - Available Invoices: Date Inv 1 21/03/2007 12	Out of Hospital      View Invoice Ite     Out of Hospital      View Invoice Ite     Jones, Marianna-Louis     E4,	nt 30 >> <	Selected Invoi Date 25/11/2013 21/03/2007	ces (Max= Inv No 41 11	-80): 2 Vi Patient Anderson, Dav Andrews, Jenni	iew Invoice Items Amount id 403.10 ifer 64.30
Service Location: Invoice Selection: - Available Invoices: Date Invo 21/03/2007 12	Specialist  Out of Hospital  View Invoice Ite  Patient Amou Jones, Marianna-Louis  64,	ns rt >> 30 >> <	Selected Invoi Date 25/11/2013 21/03/2007	ces (Max= Inv No 41 11	-80): 2 Vi Patient Anderson, Dav Andrews, Jenni	iew Invoice Items Amount id 403.10 ifer 64.30



- 3. Click the single > or double headed >> arrow buttons to move invoices from the **Available Invoices** section to the **Selected Invoices** section.
- 4. Click Send The Medicare Australia Claim Authorisation window appears.

Medica	re Australia Claim Auth	orisation - New Claim
Ż	Authorisation of a Claim r signature for the claim m services or to the allocat	must occur before storing or transmitting. The digital ust correspond to the Doctor seeking the payment for the ed location.
	Authorisation Method:	Dr Bevan Ayers (HCI Token) (2122361B)
	Passphrase:	*******
	Practitioner Declaration:	☑ I have read and agree to the terms of the declaration
	HCI Token:	View View L have inserted the correct i-Key token into my computer.
		OK <u>C</u> ancel

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

5. Cl	lick		×
	Processing Details: Starting Medicare Online Authorising Claim: A0008@ (Processing Com Submitting Claim: A0008@ (Processing)	npleted)	
	Save To File	Abort CI	lose

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.

Medicare Australia	1							
Today's Patients					M	edicare	Austra	lia - Online Claims
Appointment Book	Claim Selecti	on:						
Waiting Room	From Date:	6/05/2012		Payee	Dr Bevan Avers - Crows	Nest (21223	361B)	
Banking				Rooms:	🗹 Dr Katrine Ing - Default	(2409Ò41J)	· · · · ·	
Bank Transfers	To Date:	20/11/2012			🗹 Dr Grant Kong - Crows 🕅	lest (212237	'1A)	
Batches					🗹 Dr Brenda Reed - Defau	lt (2054781)	V) (Deleted)	)
Medicare Australia	Claim Type:	All	•					
WP Deferred Printing								Defrech
WP Review	V Exclude F	inalised Clai	ms					<u>K</u> erresit
Recalls								
Waiting List	Date 🎽	Claim ID	Claim Type		Room	Vouchers	Total	Status
MD Billing	21/05/2012	IMC00007	Eclipse	Dr Katrine	Ing - Default (2409041J)	1	45.20	Awaiting Submission
	21/05/2012	EA00006	Bulk Bill	Dr Katrine	Ing - Default (24090413)	2	519.90	Awaiting Process Report
	21/05/2012	PC00005	Patient Claim	Dr Bevan	Ayers - Crows Nest (212	1	75.60	Pay Doctor via Claimant
	15/05/2012	IMC00004	Eclipse	Dr Bevan	Ayers - Crows Nest (212	1	194.45	Awaiting Payment Report
	14/05/2012	PC00003	Patient Claim	Dr Bevan	Ayers - Crows Nest (212	1	75.60	Successful
	14/05/2012	IMC00002	Eclipse	Dr Bevan	Ayers - Crows Nest (212	1	866.50	Awaiting Process Report
	<u>N</u> ew		<u>D</u> e	elete	<u>T</u> ransmit Rejected	Reg	sipt	Log Updates

- Click the **Status** column header to sort the data by type of Status.
- o Click the **Refresh** button to reformat the data.
- o 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.

💷 Medicare Australia								
Today's Patients					M	edicare	Austra	lia - Online Claims
Appointment Book	Claim Selection	on:						
Waiting Hoom Panking	From Date:	6/05/2012		Payee	Dr Bevan Ayers - Crows	Nest (21223	361B)	
Bank Transfers				Rooms:	Dr Katrine Ing - Default Dr Grant Kong - Crows N	(24090413) Jest (212237	71A)	
Batches	To Date:	20/11/2012			✓ Dr Brenda Reed - Defau	lt (2054781)	N) (Deleted)	)
Medicare Australia	Claim Type:	All	•					
WP Deferred Printing	in the second	line of class						Refresh
WP Review	Exclude H	inalised Ciali	ns					
Recalls	Date 🔻	Claim ID	Claim Type		Poom	Vouchers	Total	Statuc
Waiting List	21/05/2012	IMC00007	Eclinse	Dr Katrine	Ing - Default (24090411)	1	45.20	Awaiting Submission
MD Billing	21/05/2012	EA00006	Bulk Bill	Dr Katrine	Ing - Default (24090413)	2	519.90	Awaiting Process Report
	21/05/2012	PC00005	Patient Claim	Dr Bevan	Avers - Crows Nest (212	1	75.60	Pay Doctor via Claimant
	15/05/2012	IMC00004	Eclipse	Dr Bevan	Ayers - Crows Nest (212	1	194.45	Awaiting Payment Report
	14/05/2012	PC00003	Patient Claim	Dr Bevan	Ayers - Crows Nest (212	1	75.60	Successful
	14/05/2012	IMC00002	Eclipse	Dr Bevan	Ayers - Crows Nest (212	1	866.50	Awaiting Process Report
	<u>N</u> ew	<u>O</u> pen	<u>D</u> e	lete	<u>T</u> ransmit Rejected	Reg	sipt	Log Updates



6. The Medicare Australia Claim Receipt window appears.

neceipt Detail	s:							
Claim ID:	A0002@ (T	he items i	n this claim	have been re	eceipted.)	Claim	Total:	\$134.4
Claim Type:	Bulk Bill		Date F	Paid:	26 Apr 201			
Claim Date:	23 Apr 2010		Payme	ent Method:	Direct Deb			
Payee Room:	Dr Bevan Ayers -		Recei	pt No:	2			
Practitioner/Lo	cum: Dr Bevan Ayers (3	Supple	ementary Amt:	\$0.0				
						T otal I	Paid:	\$68.7
Paid Items:								
Date	Patient	Inv No	Item	Amount	Paid	Error	Opt	ion
23/04/2010	Jones, Marrianna-Lo	48	104	67.20	68.75	255	Sundry Invoice	(\$1.55)
								•
•								
∢ Error Code/De	scription							
Firor Code/De     255: RENEEIT	scription:		D					
✓ Error Code/De 255: BENEFIT	scription: ASSIGNED HAS BEEN	I INCREASE	D.					

# 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.

🛃 Paula Choy - 98 - 1	MA Bulk Bill (B	BA-CN)							
Patient Details Referrals		Show recor	ds for: All	▼ Fro	om: 2/08/2011 To:	2/08/201	1	Show a	audit trail
Accounts	Invoices Re	ceipts   Refun	ds History   Write o	ffs History	Account Debtors Account Cre	edits			
MA Bulk Bill (BA-CN) Notes	Issue Date	Invoice No.	Transaction Type	Reversed	Invoice Items	Batch ID	Sundry	Amount	Paid
Correspondence	01/08/2011	56	Invoice		105			34.55	34.55
Bookings	02/08/2011	57	Invoice		105		~	0.60	0.60
Estimates									
ImageLite									
	<								F.
					New	Invoice	<u>O</u> pen	W	ite off
F3 - SM5 Message	Show rev	versals D	ebtors Balance:	0.0	0 Credits Balance:	0.00	Balance		0.00

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

🌒 Paula Choy - 98 - N	Paula Choy - 98 - MA Bulk Bill (BA-CN)											
Patient Details Referrals		Show records for: All From: 2/08/2011 To: 2/08/2011 Show						Show				
Accounts MA Pulk Bill (BA,CN)	Invoices Re	eceipts	Refund	s History	Write of	fs Histo	ry Acc	ount De	ebtors Aco	ount Cred	its	
Notes	Issue Date	Receip	pt No.	Transaction	Туре	Revers	ed Am	ount	Allocation P	ayment	Credit Payment	Discount
Correspondence	02/08/2011	24	1	Receipt			35.	15		35.15	0.00	0.00
Bookings Recalls Estimates												
ImageLite	Details: Pa	yment n	nethods	•	Rever	se Cred	it Allocat	ian	Refund Allo	cation Pay	ment New <u>R</u> ea	ceipt C
	Payment me	thods										
	Payment Me	thod	Name		Bank/C	ard [	etails	Banki	ng Slip No.	Amount		
	Direct Debit		Medicare	e Australia						35.1	5	



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.

😍 Paula Choy - 98 - N	MA Bulk Bill (	BA-CN)				
Patient Details		Show records f		- From:	2/08/2011	Te: 2/08/
Referrals		Showrecords i	or , jau	· · · · ·	12/00/2011	10. [2/00/
Accounts	Invoices Re	ceipts   Refunds H	listory Write offs H	listory Acc	ount Debto	Account Credits
MA Bulk Bill (BA-CN)	-			-		
Notes	Issue Date	Transaction No.	Transaction Type	Reversed	Amount	Running Balance
Correspondence	01/08/2011	56	Invoice		34.55	34.55
Bookings	02/08/2011	24	Receipt		(35.15)	(0.60)
Recalls	02/08/2011	57	Invoice		0.60	0.00
Estimates	02/00/2011	57	Invoice		0.00	0.00
ImageLite						

## 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**

- Within MedicalDirector Blue Chip, select Setup > Templates > Recalls. The Recall Template Setup window appears.
- 2. Click The New Recall Template window appears.
- 3. Name the template (e.g. Pap Test 24 months).
- 4. Click 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.



New Recall Tem	New Recall Template				
Template name		OK.			
		Cancel			
		Import			



## **Creating Recall Types**

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

Recalls Setup		? 💌
BA-3mth BA-12mth BA-2yr GK-3mth GK-12mth GK-2yr	Name     BA-3mth       Default period     12     weeks       Type     Phone       Print	OK Cancel
<u>A</u> dd <u>D</u> elete		

2. Click <u>Add...</u> The **New Recall Type** window appears.

New Recall Type	? 💌
Name of new recall type	
ОК	Cancel

- 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.

🚯 David Anderson -	49 - Recalls					
Patient Details	View old	View All r	ecalls 🔻	From	-	patient recalls
Accounts						puttonterooutio
Notes	Due	Practitioner		Comment	Туре	Complete
Correspondence	25/01/2013	BA-CN			GK-3mth	
Bookings	1/11/2013	BA-CN			BA-12mth	
<ul> <li>Recalls</li> </ul>	31/10/2014	DS			GK-2yr	
Estimates						
ImageLite F3 - SMS Message F9 - Medical Director						
	<u>A</u> dd	Contac	:t/print	Re <u>m</u> ove		
						h

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

- 2. Click <u>Add...</u> 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.
- 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.

Add Recall	? 💌
<u>P</u> atient:	Andrews, Graham, Master
<u>T</u> ype:	BA-3mth
Practitioner:	Dr Bevan Ayers - Crows Nest 📃
Re <u>f</u> erral:	No Referral
<u>D</u> ue:	12 weeks, i.e. 5/05/2011
Comment:	
	OK Cancel

6. Click 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.

E Recalls Today's Patients Appointment Book	<u>∏ V</u> iew old	View All	recalls 💽	From	-	recalls
Waiting Hoom Banking Bank Transfers Batches Medicare Australia WP Deferred Printing WP Review Recalls Waiting List MD Billing	Due 18/05/2011 18/05/2011 18/05/2011 22/02/2012 Qpen patien	Practitioner GK-CN BA-CN BA-CN DS	Patient Mr David J Anderson Mr Fred Nerk Ms Papacosta X Tamara Ms Heather Andrews	Type GK-3mth EC-3mth BA-3mth BA-12mth	Complete	<u>A</u> dd <u>C</u> ontact/print <u>P</u> rint all listed <u>Rem</u> ove

- 3. Click \_\_\_\_\_\_ The **Add Recall** window appears.
- 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.

Add Recall	? 💌
<u>P</u> atient:	
<u>T</u> ype:	•
Practitioner:	<b>•</b>
Re <u>f</u> erral:	
<u>D</u> ue:	weeks, i.e.
<u>C</u> omment:	
	OK. Cancel

Select Referral						×
Referral Type	Practitioner	Referring doctor	Provider No	Letter date	Effective	Expires
Doctor	BA	Dr Mark Browning	2054781W	2/01/2008	2/01/2008	2/01/2009
Doctor	BA	Dr Mark Lobel	2054781W	6/12/2007	6/12/2007	6/12/2008
Lost	Any	<none></none>	-	-	-	-
Emergency	Any	<none></none>	-	-	-	-
Hospital	Any	<none></none>	-	-	-	-
Self Deemed	Any	<none></none>	-	-	-	-
No Referral	Any	<none></none>	-	-	-	-
1						
					Select	Cancel
				·		

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 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.

I Recalls						
Today's Patients Appointment Book	☐ <u>V</u> iew old	View A	recalls 💌	From	•	recalls
Waiting Room Banking	Due	Practitioner	Patient	Type	Complete	[
Bank Transfers	18/05/2011	GK-CN	Mr David J Anderson	GK-3mth	compiete	<u>A</u> dd
Batches	18/05/2011	BA-CN	Mr Fred Nerk	EC-3mth		Contact/print
Medicare Australia	18/05/2011	BA-CN	Ms Papacosta X Tamara	BA-3mth		<u>c</u> ontact/print
WP Deferred Printing	22/02/2012	DS	Ms Heather Andrews	BA-12mth		Print all listed
WP Review						
Recalls						Re <u>m</u> ove
Waiting List						
MUBIIIIng						
	Open patier	nt				
						1.

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

Phone Recal	? 💌				
Phone No:	(03) 1234 5687				
Alt Phone:	(03) 5763 3645				
Mobile:	0411123456				
Comment:					
Click <b>OK</b> if the patient was contacted successfully. Otherwise, click Cancel to try again later.					
	OK Cancel				



Enacting a Print-based Recall Program

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

I Recalls						
Today's Patients Appointment Book Waiting Room	☐ <u>V</u> iew old	View Al	l recalls	From	-	recalls
Banking	Due	Practitioner	Patient	Туре	Complete	
Bank Transfers	18/05/2011	GK-CN	Mr David J Anderson	GK-3mth		<u>A</u> aa
Batches	18/05/2011	BA-CN	Mr Fred Nerk	EC-3mth		Contact/print
Medicare Australia	18/05/2011	BA-CN	Ms Papacosta X Tamara	BA-3mth		Contact/print
WP Deferred Printing	22/02/2012	DS	Ms Heather Andrews	BA-12mth		Print all listed
WP Review						
Recalls						Remove
Waiting List						
MD Billing						
	1					
	Open patier	nt				
, '						

- 3. Filter the list if necessary to locate and select the recall you wish to enact.
- 4. Click <u>Contact/print...</u> 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 to continue. You will be prompted to print the recall letter.

Print Recall	? X
Comment	ОК
Mark recall as contacted	Cancel

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.



## 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.

🚯 David Anderson -	49 - Correspo	ondence		- • ×
Patient Details			patien	t documents
Accounts	Date	Title	Status	
Notes	10/02/2011	Anderson, D AttaCert		New letter
Correspondence	10/02/2011	Anderson, D Ins	Review	Duplicate
Bookings	10/02/2011	Anderson, D OpReport	Print	
Hecalls Estimates				Print
ImageLite				St <u>a</u> tus
				Import
F3 - SMS Message				E <u>x</u> port
F9 - Medical Director	Edit letter	Delete	Rename	
			<u>re</u> chanic	

3. Click New Pocument window appears.

New Document - Mr D	avid Anderson	8 x
Base on template	<b></b>	ОК
Associated account	Non-specific 💌	Cancel
Document Title		
Automatically mark for	Deferred printing	
	Practitioner review	

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.

- o 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 to continue.

At this point, Microsoft Word will open and the document content is able to be edited and added to. Any predefined 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.

🐹 WP Deferred Printing					
Today's Patients Appointment Book				defer	red printina
Waiting Room				5	1 5
Banking	Date	Title	Status	Selected	Distantiated
Bank Transfers	20/03/2007	Boyes, S Quote	Print		Print selected
Batches	25/02/2011	Andrews, F AttaCert	Print		Remove colocted
Medicare Australia	25/02/2011	Dsouza, L OpReport	Print		<u>Remove selected</u>
WP Deferred Printing	25/02/2011	Tavener, B Solicitor	Print		Edit
WP Review					Earc
Recalls					
Waiting List					Select <u>A</u> ll
MD Billing					
					<u>C</u> lear All
	, ,				
					//

- 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 <u>Remove selected</u> 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).

New Document - Mr D	8 x	
Base on template	Attendance Certificate 🔹	ОК
Associated account	BA-CN Priv 27 🔹	Cancel
Document Title	Anderson, D AttaCert	
Automatically mark for	Deferred printing	
	Practitioner review	



- 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.
- 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)

🔆 WP Review				- • •
Today's Patients Appointment Book	Practitioner	Dr Bevan Ayers - Crows Ne	st 💌	wp review
Waiting Room Banking	Date	Title	Status	
Bank Transfers	24/02/2011	Anderson, D AttaCert	Review	<u>R</u> eview
Batches Medicare Australia	24/02/2011 24/02/2011	Anderson, D MedicalCert Andrews, J Letter to GP	Review Review	Print
WP Deferred Printing WP Review	24/02/2011	Boyes, S Quote	Review	Cancel review
Recalls Waiting List				<u>D</u> efer print
MD Billing				

- Click the Cancel button review to cancel printing the document altogether. The item remains in the patient's correspondence file.
- $\circ~$  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.

Banking			
Today's Patients Appointment Book			banking
Waiting Room Banking Bank Transfere	Account name	Bank details	Unbanked
Batches Medicare Australia	Kong Pty Ltd King Ayer Pty Ltd	RBA, St Leonards	499.90
WP Deferred Printing WP Review	HCN Day Surgery	CBA, St Leonards	690.50
Hecalls Waiting List MD Billing	Open Kong Pty L	td	
	Users WBC St Leonard 060214-00	is )0111	

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

🏦 King Ayer Pty Ltd -	Bank deposit						- • •
Bank deposit EFTPOS	Receipt Summ	ary	2396.60 (0.00)	Draft		ban	k deposits
ACCT History	Cheques (2) Credit Card S	lips (0)	369.95 (0.00) 0.00 (0.00)	Fi <u>n</u> alise	Brought forward Received	0.00 This deposit 2396.60 Cash drawings	2396.60 0.00
	Total received GST inlcuded i	l in Total	2766.55 0.00			Carry forward 2396.60	0.00 2396.60
	Received			Pai	d by		Amount
	1/02/2007	Mr Armond B Ta	avener				150.00
	10/02/2007	Ms Valerie T DO	E				75.00
	17/02/2007	Ms Valerie T DO	E				75.00
	9/02/2011	Mr David Ander	son				2096.60
						Total received less Cash drawings	2766.55 - 0.00
						less Carry forward	- 0.00
	View receipt	Drawings	. <u>C</u> arry Fwd			Total to be banked	2766.55
							//

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 **Figaise** to print the banking deposit slip and to reset the daily balances to zero



# **EFTPOS**

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

🐮 Banking			- • •
Today's Patients			hankina
Appointment Book			Junking
Ranking Noom	Annual anna	Daula dataila	Unberland
Bank Transfers	Account name	WPC Stleeperde	Onbanked 2524 75
Batches	King Aver Ptv Ltd	RBA, St Leonards	499.90
Medicare Australia	HCN Day Surgery	CBA, St Leonards	690.50
WP Deferred Printing			· · · · · ·
Recalls			
Waiting List			
MD Billing	Open Kong Pty L	td	
	WBC	L.	
	Users 5t Leonard 060214-00	IS 10111	
			//_

- 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.

King Ayer F Bank deposit EFTPOS Acct History Refunds	Pty Ltd - EFTPOS EFTPOS type AMEX Diners Card Direct Debit EFTPOS Meddaims This settlement			Brought forward 499. Processed 0. 499.	90 This settlement 10 Carry forward 90	eftpos 499.90 0.00 499.90
	Received	Туре		Name	Amount	Carry Fwd
	1/02/2007	EFTPOS Manual	Ms Mortimer		94.90	
	21/03/2007	EFTPOS Manual	Ms DSouza		330.00	
	23/03/2007	EFTPOS Manual	Ms V Doe		75.00	
	View <u>r</u> eceipt	Se <u>t</u> tle	Draft print		Total of settlement	499.90

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

5. Click Settlement window appears.

EFTPOS settleme	? <mark>×</mark>	
Credit to	King Ayer Pty Ltd	ОК
Amount	203.25	Cancel
Settlement date	27/07/2011	
Settlement no	354TR	

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.



# Account History

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

🚼 Banking			- • •
Today's Patients			bankina
Appointment Book Waiting Boom			ounning
Banking	Account name	Bank details	Unbanked
Bank Transfers	Kong Pty Ltd	WBC, St Leonards	3524.75
Batches	King Ayer Pty Ltd	RBA, St Leonards	499.90
Medicare Australia	HCN Day Surgery	CBA, St Leonards	690.50
WP Deferred Printing WP Review Recalls Waiting List			
MD Billing	Open Kong Pty L WBC Users St Leonard 060214-00	td  s  0111	

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

🏦 King Ayer Pty Lt	d - Acct History												
Bank deposit EFTPOS	View: All payme	ew: All payments  account history											
Acct History Deposit Slip - 1	Show records fo	r: All  From: 19/1	1/2012 <b>To:</b>	19/11/2012 She	ow audit trail								
Deposit Slip - 2	Date Finalised	Payment	Amount	Reversals (After Banking)									
Refunds	21/03/2007	Deposit slip 2	395.00	0.00									
	21/03/2007	Deposit slip 1	150.00	0.00									
	,			Vie	w payment								

5. Select the required entry, and click View payment

M King Ayer Pty Lto Bank deposit	d - Deposit Slip - Deposit slip 1 Finalised by Mr B	1 dward Carstairs	21/03/2007 12:02 pm			view bani	k deposit
Acct History Deposit Slip - 1 Deposit Slip - 2	Cash Cheques Credit Card Slips	3	150.00 0.00 0.00	Brough	ht forward 0.00 Th ved 150.00 Ca Ca	is deposit sh drawings rry forward	150.00 0.00 0.00
EFTPOS - 12223 Refunds	Total banked Adjustment (afte	er banking)	150.00 0.00	_	150.00	Shc	150.00 w audit trail
	Issue Date	Transaction No	Transaction Type	Reversed	Paid By	Amount	
	21/03/2007	1	Receipt		Ms Lubica Doranovic	1	50.00
	Show reversa	ls after banking	Vie	w Carry For	ward Reason	v receipt	<u>C</u> lose



# 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.

Ming Ayer Pty Ltd Bank deposit EFTPOS	- Refunds							accou	nt refunds
Acct History Refunds		Show record	s for: Curren	t Month	31/05/2012	To:	31/05/2	2012	Show audit trail
	Issue Date	Refund No	Refund Type	Transaction Type	Patient	Reversed	Amount	Refund Method	User
	31/05/2012	42	Credit	Refund	David Anderson		300.00	Cheque	EC
	<	ersals							•
									.H

# 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;

- o 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 G ST)	GST	Audit User Initials	Audit Date	Audit Reason
Private imc	27/07/2011 27/07/2011	Anderson, David, Mr Andrews, Fred, Mr	57 59	Invoice Invoice	45867 32078	27/07/2011 20/05/2011	295.20 209.30	0.00 0.00	EC EC	27/07/2011 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 Private Private	27/07/2011 27/07/2011 27/07/2011	Andrews, John, Mr Andrews, John, Mr Andrews, John, Mr	55 55 58	Invoice Invoice (Rev) Invoice (Adj)	104 104 105	27/07/2011 27/07/2011 27/07/2011	150.00 (150.00) 75.00	0.00 0.00 0.00	EC EC EC	27/07/2011 27/07/2011 27/07/2011	Reversing Invoice 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 Private	27/07/2011 27/07/2011	Watts, Gregory, Mr Watts, Gregory, Mr	56 62	Invoice Invoice	105 32500	27/07/2011 27/07/2011	75.00 124.60	0.00 0.00	EC EC	27/07/2011 27/07/2011	
			Totals	Invoices Invoices (Rev)			971.50 (150.00)	0.00 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.

			Receipt		Receipt Amount				Audit User		
Account Class	Issue Date	Name	No	Transaction Type	(incl G ST)	Credit	Invoices	Disc	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:
Private Private Private Private	27/07/2011 27/07/2011 27/07/2011 27/07/2011	Watts, Gregory, Mr Anderson, David, Mr Andrews, John, Mr Andrews, John, Mr	26 27 25 25	Receipt Receipt Receipt Receipt (rev)	75.00 295.20 150.00 (150.00)	0.00 0.00 150.00 (150.00)	75.00 295.20 0.00 0.00	0.00 0.00 0.00 0.00	EC EC EC EC	27/07/2011 27/07/2011 27/07/2011 27/07/2011	wrongsvcitem
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	546168
			Totals	Receipt	1,993.15	150.00	1,843.15	0.00			
				Creditalloc	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.

Payment Method	Issue Date	Receipt No	Transaction Type	Drawer / Payer	Bank / Card	Amount	User Initials	Entry Date	Audit Reason
Cash Cheque	27/07/2011 27/07/2011 27/07/2011	21 21 22	Receipt Receipt Receipt	Ms Heather Andrews Ms Heather Andrews Medibank Private	WBC CBA	150.00 26.65 402.30	EC EC EC	27/07/2011 27/07/2011 27/07/2011	
Cash	27/07/2011	23	Receipt	Ms Jennifer S Andrews		450.00	EC	27/07/2011	
EFTPOS Manual Cash	27/07/2011 27/07/2011	23 25	Receipt Receipt	J Andrews Mr John Andrews	Mastercard	203.25 150.00	EC EC	27/07/2011 27/07/2011	
	27/07/2011	25	Receipt (rev)	Mr John Andrews		(150.00)	EC	27/07/2011	Allocated invoice a svc item
EFTPOS Manual Cash	27/07/2011 27/07/2011 27/07/2011 27/07/2011	26 27 25 25	Receipt Receipt Receipt Receipt (rev)	Mr Gregory Watts d aNDERSON Mr John Andrews Mr John Andrews	VISA	75.00 295.20 150.00 (150.00)	EC EC EC EC	27/07/2011 27/07/2011 27/07/2011 27/07/2011	wrongsvcitem
	27/07/2011	28	Receipt (adj)	Mr John Andrews		75.00	EC	27/07/2011	ReplacingReceipt
EFTPOS Manual	27/07/2011	29	Receipt	Corrine Macdonald	Mastercard	90.75	EC	27/07/2011	370.000



#### 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	Wri	ite Transa No Type	ction Write-off Type	Write- off Amount	Invoice No	Service Item	Alloc amount	User Initials	Entry Date	Audit Reason
Private	27/07/2011	Watts, Grego Mr	nry,	30 Write-o	off Bad Debt	124.60	62	32500	124.60	EC	27/07/2011	EC: Leg amputated
					Totals				124.60			
							Invoice/					
Class	Issue Date	Transaction Type	Refund No	Refund Type	Name	Refund Amoun	Receipt t No	Service Item	Alloc amount	User Initials	Entry Date	Audit Reason
Private	27/07/2011	Refund	24	Allocation	Andrews, Jennifer S	<sup>S,</sup> 113.90	) 43	51300	94.00	EC	27/07/2011	Procedure not succe
Private	27/07/2011	Refund	24	Allocation	Andrews, Jennifer S Ms	<sup>S,</sup> 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.
- 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.

Print Appt list (extended)
Set Appt list (extended) Options
Date Range:
From date: 9/02/2011 To date: 9/02/2011 To date: 9/02/2011
From time: To time:
Practitioners / Appointment Types:
Practitioner Appointment Types
Dr Bevan Ayers New
Review
Post-op
Theatre
Medical Rep
Medico Legal
Dav Surgery D Cataracte
All Practitioners All Appointment types
Cancel < Back

	Dr Bevan Ayers Wednesday 27/07/2011										
Appt. Time	Appt. Ispe 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 DOB12/05/1963 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						

