Introduction

Welcome to GPComplete

Using Help Files

- Hyperlinks. Clicking a Hyperlink will jump you to other help files. e.g System Preferences. They are underlined in blue
- After you jump forward with a Hyperlink, you can get back to where you were by clicking "Back"
- Click and to enlarge and reduce images inside the help files.

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Before you start

All Users

- Set up your <u>User Preferences</u>
- Check your messages
- Check your tasks
- Exit at the end of the day

The Administrator

- Set up Backup
- Set permissions for all users
- Set <u>Bank Codes</u> for all doctors
- Administer the Recall Manager

The Doctors

- Set up <u>Auto Templates</u>
- Set up Pathology Favourites
- Set up <u>Diagnostic Imaging Favourites</u>
- Set up <u>Drug Favourites</u>
- Set up Pathology Laboratory providers
- Set up <u>Diagnostic Imaging providers</u>
- Read your <u>messages</u>
- Clear your **Document Intray**
- Clear your Pathology Intray
- Review the Recall Manager

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R click submenu options

R click submenu options

The system provides many situations to open a submenu. By R clicking on a *row, field, grid* or *patient* a drop down submenu will be provided.

be provided.
A list of examples is displayed underneath.
e.g R click on a row in a grid in the bill update form
Click to enlarge
e.g. R click on a patient on the appointment screen.
Click to enlarge
e.g R click on the encounter screen
Click to enlarge
e.g R click on the Current Rx screen
Click to enlarge

e.g R click in the Correspondence screen

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Switching Forms

Switch the active form

GPComplete enables multiple forms to be open at the same time (Multiple Document Interface). This allows swift movement between different open forms by selecting the relevant Icon from the ICON BAR at the bottom.	
e.g Select the \square Icon to bring the Bills Outstanding form into focus.	
Click to enlarge	
The ICON BAR underneath lists all the open forms.	
The Icon for the Form in focus is Gold. e.g	
The Icons for the Forms out of focus are in white. e.g	
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Default System

Administrator Details:

The **Admin** user is the administrator of the system and has the following characteristics:

- has access and control of all aspects of the system
- authorizes & de-authorizes all other user's privileges in what they can Read, Use, Add, Update or Delete.
- is generally responsible for adjusting all settings within the system.
- can re-set all other users Passwords and Staff keys at any time.
- can give or take away another users set of privileges.

THINK CAREFULLY BEFORE ASSIGNING ADMIN PRIVILIGES!!!!!

Doctor Details:

To view the appointment screen there needs to be at least one doctor present (undeleted) in the database.

A doctor is a staff member with a valid provider number- The provider number must match an algorithm to be valid.

Service Item Details:

All Medicare Services Item numbers have been included in the system.

Other service numbers can be added but the system will add the Prefix P to any added services within the system.

P=Private

Practice Details:

A default practice profile is loaded in the system.

A practice profile is required for various purposes like Billing, Payments etc.

To re-set the practice profile click Administration> Practice Profile> Search Profile.

Enter * in the text box and click search.

When setting up a new practice edit the details of the practice profile. You can also create a new practice profile and set it to default.

⚠ There can be only one default practice in the system.

Privileges:

Only administrators of the system can assign privileges to other users. Administrators cannot assign privileges to other administrators of the system.

Click Administration> Authorizations> Privileges.

Administrators can also create Authorization <u>templates</u> and assign them to staff members when they are being registered.

e.g. Create a <u>list of templates</u> for a Principle Doctor, Locum Doctor, Senior Receptionist, Junior receptionist, Nurse, Accountant etc.

Creating a <u>template</u> for various staff members is a good practice. This saves time when entering new staff into the system. The administrator can easily modify a users permissions later if adjustments are required at a later date.

Pathology and Radiology Requests:

Doctors can issue <u>pathology</u> and <u>radiology</u> requests for patients. Before requests are issued a <u>pathology lab</u> or a <u>radiology lab</u> must be saved in the system.

First Login:

The default password for all new users is **abc**.

When new users log in for the first time they will be prompted to change their password and staffkey.

The staff key is required for creating a bill or making a payment. There are other times when a staffkey is required as well. If the user is prompted for a staff key then this must be entered for the process to be completed.

A user can re-set their password and staffkey at any time. Administrators can change the password and staff key of all users.

The staff key prompt can be switched off by an administrator in the system preferences.

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End of the day

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Always Exit the system at the end of the day so that the internal clocks that communicate with Medicare Australia remain properly synchronized.

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Common topics

Click the links to these common topics.

- User Preferences
- System Preferences
- Bulk Billing
- DVA
- Private Billing
- Recalls and the Recall Manager
- Scanning
- <u>Document Intray</u>
- Hotkeys
- Messaging
- Tasks and the Task Manager
- **GPC Library**
- Grids
- Wildcards
- Backing up
- Advanced Searching

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Installation

Hardware Requirements:

Before you can start running the application, please make sure the following prerequisites are met:

- 1. Processor At least a Pentium III
- 2. Minimum RAM required is 512 MB.

Please ensure you have the latest Service Pack and critical updates for your version of Windows.

Software Requirements

Server

- Recommended operating systems are Windows Server 2003, Windows XP Professional
- Firebird / Interbase should not be pre-installed from any other Software vendors product.
- Microsoft Internet Explorer 5.01 or more recent

PMSC recommends not running the client on the server machine.

-Client

- Recommended operating systems are Windows XP, Vista, Windows 7
- Firebird / Interbase should not be pre-installed from any other Software vendors product.
- Microsoft Internet Explorer 5.01 and above
- No other 3rd party software is required to run GPComplete. (e.g. Microsoft Word/Office)

Terminal Services - go to <u>Terminal Services</u>

Firewall Settings

Server:

The firebird database server listens on port 3050 of the server by default.

Keep this Database Port open if you are using a firewall to allow the clients to connect to the server.

Keep Port 6667 open as this is required by the GP Service.

Clients:

Keep Port 6666 open as all clients need to listen on this port.

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The installation wizard

The Wizard provides two different options for installation.

1/ Server and client

Click the **Server and Client** button to install the server and client on this machine. (Only install the server on one machine in the network.)

2/ Client only

Click on the **Client only** button to install only the client on a machine- you will need to have already installed the Server on one other machine in the network.

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Server Installation

Option 1.

Select this option to install the Server and Client on the Server computer for the LAN.

Only install one instance of the Server on the network.

This will install:

- 1. Firebird Database Super Server v1.5.2
- 2. GP Service
- 3. Firebird Data File (.FDB) (gpc.fdb)
- 4. Firebird ODBC 2.0.0
- 5. GPComplete Application

Firebird Database Server v1.5.2 [1]

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Client Installation

Option 2

Select this Option to install the Clients on workstations belonging to a network where a Server installation has already been performed. (i.e Option 1)

The GPComplete Client machines will be accessing the GP Server machine via LAN.

This will install the following:

- Firebird ODBC 2.0.0
- GPComplete Application

The installation of GP Client takes some time as it copies the large 240 MB file for MIMs prescriptions.

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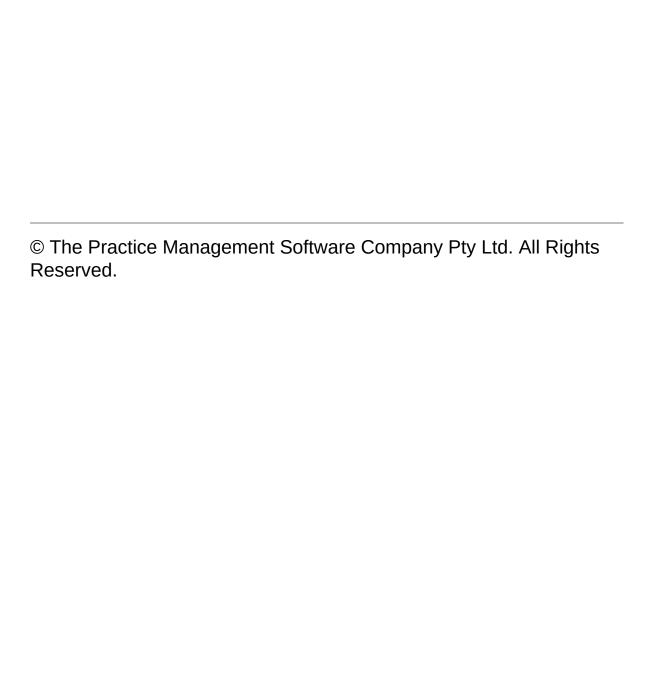
Terminal Services

Terminal Services

All users require read and write access to the folder on the Terminal Server in which GPComplete has been installed

Default pathway is **C:\GPComplete**

Registry Edit instructions



GP Service

To stop or start the **GP Service**

10 stop of start the OF Service
Go to Start > Settings > Control Panel > Administrative Tools > Services.
or
Go to Start > Run.
Type in "services.msc" in the box and hit enter.
The list of Windows Services will be displayed.
Scroll down to the GP Service and then right click on the row. From the menu select to either stop or start the Service.
The Service form can then be closed.
Click to enlarge
If the GP Service is not started then
 Results will not be download to the Intray.
 Letters and scan documents can't be read or stored.
www.firebirdsal.org

Demonstration Version

The Demonstration version of **GPComplete** is limited to the addition of 100 new patients.

Please <u>contact us</u> if you require the full version

Server Migration

Server Migration

- 1. Download the full installation from http://www.pmsc.com.au/updates/
- 2. Old server: From services turn off: Firebird Guardian Service
- 3. Copy Database gpc.fdb (default location: c:\gpcdata\ may be different on your server)
- 4. Install the GPComplete servce on new Server
- 5. Copy C:\Program Files\GPComplete\Service\SW\setup.exe from old server and run it on the new server (this is the latest update)
- 6. Stop Firebird Guardian service on the new server and copy the database backed up in step 3
- 7. Copy C:\GPComplete\Service\RecFiles from old server to new
- 8. Copy C:\GPComplete\Service\HWS FILES from old server to new
- 9. Copy C:\GPComplete\Service\MIMS from old server to new
- 10. Start Firebird Guardian service on the new server
- 11. If there is any pathology download taking place on the server these software has to be installed and configured on the new one.
- 12. On the old server open GPComplete. Goto Administration->settings->medicare australia and check the path to the cryptostore path
- 13. Copy this file from old server to new server
- 14. Configure medicare on the new server

Client Migration

Client Migraton:

- 1. Run the full installation (install only client) and the update copied in step 5 above
- 2. For setting medicare australia:On old machine check the path of the psi file on the client by going into GPComplete and then from top menu Financial > Medicare Australia > Tools > Manage Medicare Connection > Crytostore fle path
- 3. Copy the file from that location into the new machine
- 4. Copy C:\GPComplete\Client\Files\CONFIG\TransConfig.xml from the old machine to the new machine
- 5. Open C:\GPComplete\Client\Files\CONFIG\TransConfig.xml file in notepad in new machine and if required change the line so the file points to the right path
- <CryptoStoreFilePath>PATHTOPSIFILE\abc.psi/CryptoStoreFilePath>
- 6. Run the client on the new machine
- 7. Configure the client to point to the : put the Ip address of the server and the path of the database file as on the server (eg: c:\qpcdata\qpc.fdb)

You will also need to setup the pathology download programs to download the results to C:\GPComplete\Service\RecFiles on the new server

Login

Username = not case sensitive Password = case sensitive

Users are prompted to change their password and staff key after their FIRST login

The initial password is 'abc'

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Add Login

Add Login

Whenever a <u>new staff registration</u> takes place, a login is created for the staff member being registered. You can create new logins for existing staff members as well. You can create a new login only if you are the administrator of the system or you have the privilege to do so.

To add a new login select administration from the main menu and then add login from the login manager submenu.

The create logir	n form will	now be	displayed t	to you.

Type in the login name and login password which are limited to 10 alphanumerics. If you want this login to be an administrator of the system then please tick the "Is Admin" checkbox. Before clicking on the create login button please select the staff code of the staff member you want to create the new login for. To select the staff code, click on the '?'.

The staff list will be displayed to you. Select the staff you want to create the login for by double clicking on the staff record or hit enter on the grid after selecting the staff member. The staff list form will automatically close after you have made your selection and the staff code of the staff member selected will be filled on the login form.

When you click the create login button now, the software will first check if any matching username or login name already exists in the system. If so, the software will prompt you that the username already exists and you will have to input a different username. Otherwise the login will be saved and ready for use.



The password typed here will have to be changed the first time any user logs on with the newly created login.

Delete Login

Delete Login

Only Admin users can delete a Login

Administration > Login Manager > Edit Login

The form contains a list of existing logins



The login list will only show you the logins which are active. Deleted logins will not be shown.

To delete a login, first select the login you want to delete or click the delete button of the form. The software will prompt you for confirmation. The login will immediately be deleted from the system.

If the login being deleted is currently logged on to the system, then the deletion will take effect only after the user has logged off from the system.

assword and Staff Key

All users of the system can change their password and staff key. To change your password or staff key select administration from the main menu and then password and staff key from the login manager submenu.

A new form will be displa	yed where you can change your login password
or you staff key.	
_	

Password

Your password is the key to your software. It is used to authenticate you as the user. You cannot login to the system without a valid username and password.

You can change both your password and staff key simultaneously or either of them. Please tick the appropriate checkbox. To change your password or staff key, you will need to input your old password or staff key. Otherwise, the system will not allow you to change your password or staff key.

When you log in for the first time you are required to change your password and set your staff key. At first login you are not required to enter any old staff key, but you need to enter the initial password. Please ask the administrator of the system or the user who created your staff registration for your initial password.

Edit Login

Edit Login

An administrator can modify the login settings of all other users.

To modify a login select Administration>Login Manager>Edit Login submenu.

The form containing a list of all existing logins in the system will be displayed to you.



The login list will only show you the logins which are active. Deleted logins will not be shown.

To edit a login you can double click any record or hit enter on the grid after selecting the login you want to edit or click the edit button of the form.

The login update form will now be displayed to you with the details of the login.

The login name or username cannot be changed.

The password and staff key of any user can be changed by the Administrator.

To make the login an administrator login you need to tick the "Is Admin" checkbox.

After you have made the changes click the update button.

If the login being modified is currently logged on to the system, then the password change will take effect only after the user has logged off

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from the system. The staff key change will take effect immediately.

Staff Key

Staff Key

The system will prompt for a staff key for important actions or changes in the system

For example creating a bill or making a payment

The Staff Key can be disabled by the Admin user

Administration > Settings > System Preferences > Administration Tab Uncheck the box Ask for Staff key for important operations

	Click to	enlarge
	CIICK LU	cilial qe

Session

On the main menu click Session > Log Off

Log off when you are not using the system or if another user wants to Log themselves into the system

The software will prompt you for your unsaved changes and log you off.

Always Exit the system at the end of the day so that the internal clocks that communicate with Medicare Australia remain properly synchronized.

Lock

GPcomplete will lock the system automatically after a specified period of inactivity.

The user will then need to Login again to unlock the system.

Automatic Locking can be disabled or the Locking interval adjusted through <u>user preferences</u>.

To Lock the system at any time, go to the main menu. Click Session>Lock.

The time interval to automatically lock can be adjusted

Go to Administration > User Preferences.

On the General tab, enter the "Lock time interval". The units are in minutes





When the application is in a locked state and you click exit, all unsaved data of the previous user will be lost. The software will ask for the confirmation if exit is clicked accidentally.

See Also

Administration - Settings: <u>User Preferences</u>

On the main menu Click Session>Exit. This shut down the application.
The application with prompt you to save any unsaved data before it shuts down.
The system will prompt with a warning to shutdown if it has been running past midnight.
△ Always Exit the system at the end of the day so that the internal
clocks that communicate with Medicare Australia remain properly synchronized.
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Administration

Click Administration on the main menu

Adding a Practice Profile

The Practice Profile stores details about the practice.

There can be more than one practice profile, but at any given point of time there is only one default practice profile.

This default practice profile is required for printing and other purposes such as storing the details of the state and country of any new patient or staff registration.

The software comes with a default practice profile which can be modified by you.

You can also create a new profile and set it to be the default.

Steps to add a Practice Profile

1. On main menu select

Administration> Practice Profile > Create profile

2. Fill in the required fields and click create new button



You can also open the practice profile screen from practice profile search by selecting the "Add New" button.

Mandatory Fields in Practice Profile

▶ Show All

<u>ABN</u>

The ABN number of the practice.

Name

The name of the practice.

Other fields in Practice Profile

Post code, Suburb and State

Post Code, Suburb and State autofill is provided in the software. Before you can do a search on post code, you need to enter at least 3 digits of the post code you are searching for. To start the search, click on the '?' button next to post code text box. If a match is found, a separate form opens up where you can select the desired post code by double clicking. Suburb and State gets automatically filled in. Otherwise you can also type in the suburb and hit the tab key. If a perfect match is found with the suburb, the post code and state gets filled in automatically.

Unless you have specified any country other than Australia, your choice of states will be restricted to states in Australia.

Set Practice as Default

If you want to save this profile as the default one then please tick this checkbox on.

It is recommended to fill up all the default practice values.

ee Also

Practice: Modifying a Practice Profile | Deleting a Practice Profile | Practice Profile Search

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Modifying a Practice Profile

You can modify a practice profile after searching for the profile.

Restrictions

If the practice you are modifying is the default one, then the "Set Practice as Default" checkbox will be disabled. At any given point of time at least one practice profile has to be the default one. If you want to make a different practice profile the default one, then the only way to do so is to tick the "Set Practice as Default" checkbox of the different profile and save it. This will uncheck the earlier default practice.

See Also

Practice: Adding a Practice Profile | Deleting a Practice Profile | Practice Profile Search

Deleting a Practice Profile

Currently there is no way to delete a practice profile. The only record you should be concerned about is the default practice profile. The others are not used by the application unless and until any one of them is made the default profile.

See Also

Practice: Adding a Practice Profile | Modifying a Practice Profile | Practice Profile Search

Practice Profile Search

Reserved.

RRMA 3-7

Click Administration>Practice Profile>Search Profile tick the box for RRMA 3-7

Adding a Contact

To add a new contact from the main menu
click on Administration > Address Book > Add New
A form will be displayed to you where you can add your contact details.
Click to enlarge

Mandatory Fields in Address Book

▶ Show All

Any one of the following fields in address book is mandatory.

<u>Name</u>

Organization

Other Fields in Address Book

Post code, Suburb and State

Category

Private

Administrators of the system will be able to view and update all contacts present in the system.

A contact can also be added automatically while saving a pathology lab, radiology lab or an agency. After saving the pathology lab, radiology lab or an agency, the system will prompt you whether you want to save the added lab or agency as a contact in your address book.

ee Also

AddressBook: Modifying a Contact | Search Contact

Modifying a Contact

You can modify a contact after searching for it.

Restrictions

- 1. You cannot edit a contact which is created and marked as private by another user.
- 2. You cannot delete a contact which is not created by you.

Administrators can search and modify all contacts.

ee Also

AddressBook: Adding a Contact | Search Contact

Search Contact

To Search

Click Administration > Address Book > Search
A search form will be displayed to you.
You can search for contacts from this screen by typing in a combination of name, organization, suburb, state and post code
You can use wildcard characters when searching.
If your search matched any records, then the contacts will be displayed in the grid below.
Click to enlarge Click to enlarge

You can hit enter on any searched record or double click it. This will display the contact where you can modify the details.

Options

- 1. **Category** You can filter the search records by your preferred category. Set category to 'None' if you do not want any filter.
- 2. **Include Deleted Contacts** Setting this option will include in the search results contacts which are deleted but matches the search criteria.
- 3. **Show Card View -** Setting this option will display the search results in a card view format. If this option is switched off, the search results will be displayed as records.

See Also

AddressBook: Adding a Contact | Modifying a Contact

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Agency

On the main menu click

Administration>Agency

Adding an Agency

Agency details can be stored in the software.
These details are needed when billing an agency.
To add click
Agency > Add Agency
The form to add a new agency will be displayed to you.

Mandatory Fields in Agency

Show All

Code

The code by which the software will recognize the agency

Name

The name of the agency

Address 1

The address of the agency

Post code. Suburb and State

Post Code, Suburb and State autofill is provided in the software. Before you can do a search on post code, you need to enter at least 3 digits of the post code you are searching for. To start the search, click on the '?' button next to post code text box. If a match is found, a separate form opens up where you can select the desired post code by double clicking. Suburb and State gets automatically filled in. Otherwise you can also type in the suburb and hit the tab key. If a perfect match is found with the suburb, the post code and state gets filled in automatically.

Unless you have specified any country other than Australia, your choice of states will be restricted to states in Australia.

Other Fields in Agency

ABN

ABN of the agency

Contact Name

Contact name should be inserted in the format lastname, firstname, middlename

See Also —

Agency: Modifying an Agency | Deleting an Agency | Search Agency

Modifying an Agency

You can modify agency details if you have permission.

Click Agency > Search Agency. You can use a <u>wildcard</u> in your search.

Restrictions

- 1. You cannot modify the agency code.
- 2. You will not be able to delete the agency if you are not authorized.

See Also -

Agency: Adding an Agency | Deleting an Agency | Search Agency

Deleting an Agency

You can delete an agency if you are authorized to do so. Tick the deleted checkbox when you are modifying the agency to mark the agency as deleted.

See Also -

Agency: Adding an Agency | Modifying an Agency | Search Agency

Search Agency

A search functionality is provided for the agencies. On the main men click on agency and then select search agency.
A search form will be displayed to you. You can search for agencies from this screen by typing in a combination of name or code or ABN. You can make the use of wildcard characters when searching. If you search matched any records, then the agency records will be displayed in the grid below.
Click to enlarge

You can hit enter on any searched record or double click it. This will display the agency screen where you can modify the agency details.

Options

1. **Include Deleted Agencies -** Setting this option will include in the search results agencies which are deleted.

ee Also

Agency: Adding an Agency | Modifying an Agency | Deleting an Agency

Pathology

See also <u>Pathology Results</u> and <u>Pathology Requests</u>

Add-Search-Modify a Pathology Lab

At least one pathology laboratory provider must be registered in the system before a request can be issued.

A list of pathology labs can be stored in the system.

To add a pathology lab click

Administration > Add Path Lab.

A new form	will be	displayed	to you	where	you car	า save a	patholo	gy
lab.			-		-			

Click to enlarge
<u>Short to ornar go</u>

Mandatory Fields in Pathology Lab

▶ Show All

Code

<u>Name</u>

Other fields in Pathology Lab

Post code, Suburb and State
Default

When you save a pathology lab, the software will prompt you whether you want to include it as a contact in the address book.

See Also

Pathology: Modifying Pathology Lab | Search Pathology Labs

Modifying Pathology Lab

You can modify a pathology lab record after searching for it if your login has this <u>permission</u>.

Restrictions

- 1. You cannot modify the pathology code.
- 2. You will not be able to delete the Pathology Lab if you are not authorized.

See Also

Pathology: Add-Search-Modify a Pathology Lab | Search Pathology Labs

Search Pathology Labs

A list of all Pathology Labs can be displayed by clicking Administration > Search Path Lab from the sub menu.

A search form will be displayed to you. You can search for pathology labs from this screen by typing in name or code. You can make the use of <u>wildcard</u> characters when searching. If your search matched any records, then the pathology labs will be displayed in the grid below.

Click to enlarge

You can hit enter on any searched record or double click it. This action will take you to the pathology screen where you can modify the pathology lab details.

Options

1. **Include Deleted Pathology -** Setting this option will include in the search results pathology labs which are deleted. If this option is switched off, the search results will output only those pathology labs which are currently present.

ee Also

Pathology: Add-Search-Modify a Pathology Lab | Modifying Pathology Lab

Add Pathology test to request table

A large number of pathology tests are already stored in the table. If the doctor wants to add a <i>user defined</i> test to this table then this is how it's done.
Click on
Administration > Pathology > Requests > Add Request
The new Pathology Request form is be displayed.
Here you can use any code that might help you remember a particular test.
Both the code and description are mandatory.
When the request code is selected on the request form the particular request associated with the code will be generated.
See Also
Pathology: Search or Modify Pathology Request Search Pathology Request

Search or Modify Pathology Request

You can modify a pathology request test after having searched for it.
To search for a Pathology Requests saved by users click on
Administration > Pathology > Requests > Search.
The search form is displayed.
after searching for the pathology code, it can then be edited
Click to enlarge
See Also
Pathology: Add Pathology test to request table Search Pathology Request

Add Pathology Favourites

Doctors or administrators of the system can group pathology requests together as a favourite.

For example a favourite named "Pregnancy" could contain all routine antenatal screening tests.

Using favourites can reduce the time required for issuing pathology requests to patients.

To create a pathology favorite from the main menu click on Administration > Pathology > Favourites > Add New.

The pathology favourites form will be displayed to you.

Type in a favourite name.

Type in notes which are added to the request form.

The grid on the left shows the list of all requests in the system.

Reduce this by filtering down the number of records in the left grid by searching for the requests.

Only the requests matched by your search criteria will then be displayed on the left grid.

then:

Drag and drop the request from the left grid to the right grid

or

highlight a test in the left grid and hit the enter key to add the test to the right grid

or

use the arrow keys between the two grids. The arrow keys can also be used to move requests between the left & right grids.

Make use of the Ctrl and Shift keys of the keyboard to help you with

Click to enlarge
For instance if "pregnancy" is selected from the drop down arrow in the favourites field then a group of tests can be selected.
Click to enlarge After you have selected your requests click save.
If you want to share this favorite with other doctors, then please tick the "Share with other doctors" checkbox. All doctors of the system will then be able to use your favorite for issuing pathology requests to patients.
tick the "Share with other doctors" checkbox. All doctors of the system will then be able to use your favorite for issuing pathology

Modify Pathology Favourites

You can modify the pathology favorites which have been created by you. To view the list of pathology favorites please select administration from the main menu, select pathology and then select list from the favorites sub menu.

The list of pathology favorites which have been created by you will be displayed.

If you want to share or delete any pathology favorite, you can do so from the grid. Just tick on the appropriate checkbox if you want to share or delete any pathology favorite. Sharing a pathology favorite will allow other doctors to use the favorite while issuing pathology requests. If the favorite is not shared then only the person who creates the favorite will be able to use it.

If you need to change the requests present in the pathology favorite or change the notes associated with the favorite, then double click the pathology favorite record you want to edit or select the pathology record and click the edit button.

The pathology favorite form will be displayed to you where you can modify the favorite and save it.

See Also

Pathology: Add Pathology Favourites

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Radiology

See also <u>Radiology Requests</u> and <u>Radiology History</u>

Add a Radiology Clinic

To add a Radiology Clinic from the main menu select Administration > Add a Radiology clinic.

A new form	will be	displayed	to you	where	you ca	n save	a radio	logy
Clinic.								

	Click to enlarge

Mandatory Fields in Radiology Clinic

▶ Show All

Code

<u>Name</u>

Other fields in Radiology Clinic

Post code, Suburb and State
Default

When you save a radiology Clinic, the software will prompt you whether you want to include it as a contact in the address book.

See Also

Radiology: Modifying a Radiology Clinic | Search Radiology Clinic

Modifying a Radiology Clinic

Modify a Radiology Clinic

First Search for it then modify the details on the form

Restrictions

- 1. You cannot modify the radiology code.
- 2. You must be authorized.

See Also

Radiology: Add a Radiology Clinic | Search Radiology Clinic

Search Radiology Clinic

All Radiology Clinics in the system can be searched.
From the main menu click on
Administration > Search Radiology Clinics.
A search form will be displayed to you. You can search for Radiology Clinic from this screen by typing in name or code. You can make the use of wildcard characters when searching. If your search matched any records, then the radiology Clinic will be displayed in the grid below.

You can hit enter on any searched record or double click it. This action will take you to the radiology screen where you can modify the Radiology Clinic details.

Options

1. **Include Deleted Radiology -** Setting this option will include in the search results Radiology Clinic which are deleted. If this option is switched off, the search results will output only those Radiology Clinics which are currently present.

ee Also

Radiology: Add a Radiology Clinic | Modifying a Radiology Clinic

Add Radiology Favourites

Doctors or administrators of the system can group a few radiology requests together as a favourite.

Using favourites can reduce the time required for issuing radiology requests to patients.

To create a radiology favourite select administration from the main menu, select radiology and then add new from the favourites sub menu.

The radiology favourites t	form will be displayed to you.	

Type in a favourite name and the notes.

These notes will be added to the request form.

The grid on the left shows the list of requests.

Drag and drop the request from the left grid to the right grid

or

double click a request to move it the right grid

or

make use of the arrow buttons after selecting the required requests. Use the Ctrl and Shift keys of the keyboard to help you with multiple selection of requests.

You can also filter down the number of records in the left grid by entering a code in the Search Description field.

After you have selected your requests click save.



If you want to share this favourite with other doctors, then tick the "Share with other doctors" checkbox.

All doctors can then use your favourite requests.

See Also

Radiology: Modify Radiology Favourites

Modify Radiology Favourites

you. To view the list of radiology favorites please select administration from the main menu, select radiology and then select list from the favorites sub menu.
The list of radiology favorites that you have created be displayed.

You can modify the radiology favorites which have been created by

To share or delete any radiology favourite, you can do so from the grid.

Just tick on the appropriate checkboxes if you want to share or delete any radiology favourite.

Sharing a radiology favourite will allow other doctors to use the favourite while issuing radiology requests. If the favourite is not shared then only the person who creates the favourite will be able to use it.

If you need to change the requests present in the radiology favourite or change the notes associated with the favourite, then double click the radiology favorite record you want to edit or select the radiology record and click the edit button.

The radiology favourite form will be displayed to you where you can modify the favourite and save it.

See Also

Radiology: Add Radiology Favourites

Add Diagnostic Imaging Request

A number of radiology requests are already present in the system. If the doctor or the administrator of the system want to add user requests they can do so. To add a radiology request click on administration on the main menu, select radiology and then select add new from the requests sub menu.
Click to enlarge
The form to add a new radiology request will be displayed.

All the three fields on the form are mandatory. You can either select a predefined category from the drop down or type in a new category name. After you have input the request details click on save. The request will be available for you to select in the radiology issue request section of the clinical profile of any patient.

See Also

Radiology: <u>Modify Diagnostic Imaging Request</u> | <u>Search Diagnostic Imaging Request</u>

Modify Diagnostic Imaging Request

You can modify any radiology request after searching for it.

See Also

Radiology: Add Diagnostic Imaging Request | Search Diagnostic Imaging Request

Search Diagnostic Imaging Request

A search functionality is provided for pathology requests saved by users.
click on administration >select Imaging > requests > search.
Click to enlarge
The search form for radiology requests will be displayed.
You can search for radiology requests from this screen by typing in name or code or both.
You can make the use of wildcard characters when searching.
If your search matched any records, then the radiology requests will be displayed in the grid below.
Click to enlarge
You can hit enter on any searched record or double click it. This action will take you to the radiology request screen where you can modify the request details.
See Also
Radiology: Add Diagnostic Imaging Request Modify Diagnostic Imaging Request
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Adding a Service

The software comes loaded with most of the service items required to run a practice. You can still add your own service items which are required to generate a bill.

•	3				
		item please s ervice from th		om the main ment o menu.	J
The form	to add a ne	w service will	now be displa	ayed to you.	

All new service codes added to the system will have the letter **P** as a prefix to their code number.

This prevents overwriting of MedicareAustralia item numbers which are automatically stored within the system.

Therefore in searching for these added services the letter P must be placed at the beginning of the search.

Mandatory Fields in Service

Code

<u>Name</u>

Description

Other Fields in Service

MBS Description

GST Applicable

Fees

See Also

Service: Modifying a Service | Deleting a Service | Search Service

Modifying a Service

You can modify a service item after searching for it if your login has proper privilege.

Restrictions

- 1. You cannot modify the service code.
- 2. You cannot modify the MBS description.

See Also -

Service: Adding a Service | Deleting a Service | Search Service

Deleting a Service

You can delete a service item if you are authorized to do so. Tick the service deleted checkbox when you are modifying the service to mark the item as deleted.

See Also -

Service: Adding a Service | Modifying a Service | Search Service

Search Service

A search functionality is provided for service items. To search for a service, select items from the main menu and then select search service from the service sub menu.
The service search form will now be displayed to you. You can search for service items from this screen by typing in a combination of name or code or description. You can make use of wildcard characters (*) when searching. If your search matched any records, then the service search results will be displayed in the grid below.
For example search 23
or search for all services beginning with P
You can hit enter on any searched record or double click it. This action will take you to the service item screen where you can modify the details.

Options

1. **Include Deleted Service -** Setting this option will include in the search results, service items which are currently deleted.

ee Also -

Service: Adding a Service | Modifying a Service | Deleting a Service

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Load agency rates

Loading the agency rates for a particular agency

e.g. Load the "Workcover" rates
open and select the file relevant to the agency and then click Load

Reserved.

Adding an Inventory

The software has the ability to store inventory items for a practice You can add your own inventory items. To add an inventory item select items from the main menu and then add inventory from the inventory sub menu.
The form to add a new inventory will be displayed to you.

Mandatory Fields in Inventory

▶ Show All

<u>Code</u>

Name

Cost per Unit

Retail Price

Reorder Level

Increase Quantity By

Reorder Quantity

Other Fields in Inventory

Quantity on Hand (QOH)

See Also -

Inventory: <u>Modifying an Inventory</u> | <u>Deleting an Inventory</u> | <u>Search Inventory</u>

Modifying an Inventory

You can modify an inventory after searching for it if your login has proper privilege.

Restrictions

- 1. You cannot modify the inventory code.
- 2. You will not be able to delete the inventory if you are not authorized.

See Also

Inventory: Adding an Inventory | Deleting an Inventory | Search Inventory

Deleting an Inventory

You can delete an inventory if you are authorized. Tick the deleted checkbox when you are modifying an inventory to mark the inventory as deleted.

See Also -

Inventory: Adding an Inventory | Modifying an Inventory | Search Inventory

Search Inventory

The software provides a search functionality for the inventory. To search for inventory, select items from the main menu and then select search inventory from the inventory sub menu.
The inventory search form will now be displayed to you. You can search for inventory from this screen by typing in name or code. You can make the use of wildcard characters when searching. While searching by code please make sure you start the search by 'INV'. If your search matched any records, then the inventory search results will be displayed in the grid below.
Click to enlarge

You can hit enter on any searched record or double click it. This action will take you to the inventory screen where you can modify the inventory details.

Options

- 1. **Below Reorder Level only -** Setting this option will include in the search results only those inventory records which are currently below the reorder level. If this option is switched off, the search results will output all the results matched by the search criteria.
- 2. **Show Deleted -** Setting this option will include in the search results, inventory records which are currently deleted.

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Inventory: Adding an Inventory | Modifying an Inventory | Deleting an Inventory

List of Inventory Favorites

To view the list of previously saved inventory favorites please select items from the main menu, select inventory and then list fron the favorites sub menu.	1
The list of inventory favorites will now be displayed in a grid.	
You can hit enter on any record, or select the record and click edit button or double click the record. This will display the inventory favorite where you can make changes. To delete the favorite, pleas tick the deleted check box on the appropriate record. You can also mark the inventory favorite as deleted from the main inventory favorite screen.	е
See Also	
Inventory Favorite: Adding an Inventory Favorite Modifying an Inventory Favorite	
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Modifying an Inventory Favorite

You can modify a previously saved inventory favorite from the <u>List of Inventory Favorites</u>.

See Also -

Inventory Favorite: Adding an Inventory Favorite | List of Inventory Favorites

Adding an Inventory Favorite

favorite. For examp contain a syringe a	w inventory items together and situally allowed ble an inventory favorite like surgice and a new a pair of gloves. To add a new a from the main menu, select inve	al tray might inventory
	n the favorites sub menu.	,
A form where you c displayed to you.	an save an inventory favorite will	now be

The grid on the left of the form will contain the list of all inventory items. You can filter the items by typing in the first few letters of the name of the inventory you are looking for. To view all the inventory items again, you can clear the search name text box.

Mandatory Fields in Inventory Favorite

Name

Inventory Selected

More information on how to use the inventory favorite can be found in the <u>appointments</u> section of the patient <u>clinical profile</u>.

See Also

Inventory Favorite: <u>Modifying an Inventory Favorite</u> | <u>List of Inventory Favorites</u>

Inventory context menu

Inventory Context Menu

The inventory checkbox of the records will be ticked on if any inventory was assigned to the appointment.

Inventory assigned to an appointment cannot be directly billed.

For billing purposes a special service item with service code 'INV' is provided whose description and price you can adjust while billing.

Inventory can only be added to appointments which are for the current date and which have not been billed.

You can only view the inventory used in past appointments and will not be able to modify them. To add or view the inventory used, right click on any record and click on inventory.

The inventory form for appointments will be displayed.

You can type in the inventory code on the first row and first column of the grid and hit enter. The inventory will be added to the grid. You can change the quantity of the inventory used. If the inventory quantity entered, is currently not available in the system, you will not be able to insert the inventory.

If you do not remember the inventory code, click the first row and first column of the grid and use the combination of 'Ctrl - L' keys of your keyboard to open inventory search. You can select the record from inventory search by double clicking it, and the inventory will be added here. If you wish to add a new inventory at this stage, please use the

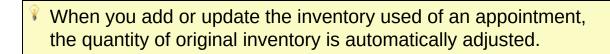
combination of 'Ctrl - N' keys of your keyboard when the focus is on the first row and first column of the grid. The newly added inventory will be included in the grid.

While doing inventory search from this form, you can make us	se of
your <u>inventory favorites</u> .	

Select the inventory favorite from the drop down list and click on the select button. The inventory items stored in your favorite will be added to the grid.

If the inventory favorite you selected contains any deleted inventory or if any of the items do not have the required quantity of inventory as specified in the favorite, then those inventory items will not be added to the grid. The remaining inventory items in the favorite will be added. The software will output appropriate messages if such situations arrive.

Please click on the save button after you have finished adding the inventory. The appointment record will now display a ticked checkbox where you have added the inventory.



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Staff

How to Add a new Staff member:

Click on the main menu Staff>Add Staff. The Staff Register form will become active.
Complete the required fields on the Staff Register from.
Note the Privileges entry in the bottom right corner of this form. A drop-down list of different templates can be selected. Templates provide a shortcut in assigning permissions to a new staff member. Click to enlarge
You can also open the staff register screen from staff search by selecting the "Add New" button.
▶ Show All
▼ Hide All

Mandatory Fields in Staff Registration

Code

The staff code is the code by which the staff is recognized application wide. Once a staff member is registered, the staff code cannot be modified. No two staff members can have the same staff code. Staff code is restricted to 10 alphanumerics. A good convention of keeping staff codes is to use the first initial along with the last name of the staff member.

1

You cannot have a space in the staff code field

Name

Staff name should be entered in the format "lastname, firstname, middlename".

Phone

At least any one of either home phone, work phone or mobile phone number is mandatory. You cannot register a staff in the application without entering the staff contact number.

Date of Birth

Date of birth field is mandatory for staff members.

<u>Username</u>

The staff username is automatically filled with the staff code entered by you. The username for logging in to the application can be set to a different name from the staff code only at this time of registration but once registration has occurred then you cannot change the username or login name again. If this were necessary then the administrator would need to delete your account (login code) and create a new login once again.

Password

By default the password is set to "abc" once a staff code is entered. You can then change the initial password after logging into the system for the first time with the new username. The system will prompt you for your password and staff key changes. At this time a new password (& staff key) can be set. For more information see "Password and Staff Key".

Privilege

If you have already setup authorization templates for your application, then you can choose the privilege you want to give to the new staff member. If you wish to allocate the minimum privileges to the staff member, you can select "None" in the drop down box. Privileges can always be added to or removed from a login at a later time. An almost infinite variety of privileges can be assigned to an individual user, but templates in general allow a simpler means of assigning privileges to various staff categories. For instance templates could be set for permanent doctors, locum doctors, nurses, junior receptionists, senior receptionists, practice administrators, accountants etc etc... If the staff member you are registering is an administrator of the system, then please tick the "Is Admin" checkbox provided. An administrator login allows all the privileges present in the system.

△ GIVE CAREFUL THOUGHT BEFORE ASSIGNING "ADMIN" PRIVILEGES TO A NEW USER OF THE SYSTEM.

Other Fields in Staff Registration

Provider No.

If the staff member you are registering is a doctor, then you should enter the doctor's provider number in this field.

The application differentiates a doctor from other staff members with the help of this field.

Provider types include Allied Health, Radiologists and Pathology Providers

For Allied Health enter the Provider No. 1111

The provided number entered by you is validated against a certain algorithm. Without a valid provider number, the application will not allow you to register the staff.

If you do not enter any provider number the doctor code will not appear in the appointment screen.



Please include any leading zeros in the provider number

Prescriber No.

Prescriber number is needed by the application to allow a staff to issue medication or generate prescription scripts. Without a valid prescriber number you will not be able to save or print scripts.

Billing Preference

By default, the billing preference for a staff member is set to the practice ABN. If at all a staff member wishes to use his/her ABN for billing purposes, then you can include the ABN number in the ABN field and

select "SELF" from the billing preference drop down.

Post code, Suburb and State

Post Code, Suburb and State autofill is provided in the software. Before you can do a search on post code, you need to enter at least 3 digits of the post code you are searching for. To start the search, click on the '?' button next to post code text box. If a match is found, a separate form opens up where you can select the desired post code by double clicking. Suburb and State gets automatically filled in. Otherwise you can also type in the suburb and hit the tab key. If a perfect match is found with the suburb, the post code and state gets filled in automatically.

Unless you have specified any country other than Australia, your choice of states will be restricted to states in Australia.

Locum

If staff member being registered is a locum, then you need to choose the staff for whom he/she is being assigned. This can be done from the drop down list containing the staff codes.

Duplicate Staff Prompt

The software will prompt you for duplicate staff if it finds a close match with already registered staff in the system. For more details please see "Duplicate Staff"

ee Also -

Staff: Modifying a Staff | Deleting a Staff | Staff Search

Reserved.

Modifying a Staff

A staff member's record can be modified after it has been entered.

Restrictions

- 1. You cannot modify the staff code once the staff is registered
- 2. Login details will not be present in this screen anymore

See Also -

Staff: Staff | Deleting a Staff | Staff Search

Deleting a Staff

A staff member cab be deleted through the "Deleted" checkbox in the bottom left corner of the form.

Just tick the checkbox and then click save to delete the staff member.





Once you delete a staff member, all the logins associated with the staff member will be automatically disabled.

See Also

Staff: Staff | Modifying a Staff | Staff Search

Staff Away

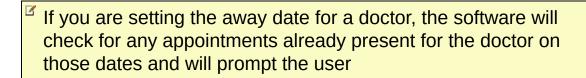


If you are an administrator of the system you can set away records for all staff members, otherwise you can set away dates only for yourself.

If you are taking leave for a few days, you can set yourself as away
specifying the dates. To create an away record go to the main menu
and select staff and then away dates.

Steps to create staff away:

- 1. Choose the staff code that you wish to set the away dates for. If you are not an administrator, then only your own staff code will be present in the list.
- 2. Add a new record to the grid by selecting the dates in the first row of the grid and hit enter. Please take a look at "Working with Grids"



When you hit enter after selecting the dates the row will be added to the grid.



You can also edit a staff away record or delete it. Whatever changes you make to the form will have to be saved for changes to take effect.

Allow Results Checkbox

The "allow results" checkbox has significance only to doctors in the system. When a doctor's away record is being set, the "allow results" checkbox determines whether other doctors in the system will be able to view his or her pathology results downloaded on those dates.

Restrictions for Staff Away

- 1. Once a record is added to the grid you will not be allowed to change the away date. You can delete the record and add a new one.
- 2. If the return date of a record is in the future, then you will be able to change the return date or delete the record. If the return date is past the current date then no changes or deletion of the record is allowed.



- Once you have saved the records, the login of the staff member will be disabled on the dates that he or she will be away. The login will automatically be enabled on the date specified as the return date.
- If you have set an away for yourself starting from the current date, you will not be able log back in to the system after you have logged out. An administrator of the system will have to delete your away record in this situation if you need to log in again.
- If a staff member returns before the specified return date, then the administrator of the system will have to log in and modify the staff member's away dates and set the return date to the current date before the staff member can log on to the system.

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Duplicate Staff

If the new staff member you are registering has the same last name
and first name as an existing staff member, then the system will
prompt you about the duplicate staff.

You have two options:

- 1. Keep New Staff: This option will let you continue with registering the new staff member
- 2. Merge New Staff: Select this option to merge the new staff with an existing staff member you have selected from the grid.

If merging two staff then all new values will overwrite the old values except the staff code. The staff code will remain the same.

See Also

Staff: Staff

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Staff Search

On the main menu click on Staff>Search staff.
A search form will be displayed to you. You can search for staff members from this screen by typing in name or code or both. You can make use of <u>wildcard</u> characters when searching.
Click to enlarge
If your search matched any records, then the staff members will be displayed in the grid below.
Click to enlarge

You can hit enter on any searched record or double click it. This action will take you to the staff details screen where you can modify the staff details.

Options

- 1. **Include Deleted Staff -** Setting this option will include in the search results all Staff members including those who have been deleted. If this option is switched off, the search results will output only those Staff who are currently present.
- 2. **Include Away Staff** Setting this option will include in the search results Staff who are inactive or away. If this option is switched off, the search results will output only those Staff who are currently active.

Click to enlarge	
See Also Staff: Staff Modifying a Staff Deleting a Staff	
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Practice Rooms

Users of the system can assign any patient to a practice room.

The additional icon will appear after the patient's name on the appointment screen.

You can create any number of practice rooms you want and the rooms will be available to choose from the <u>appointment context</u> menu.

To manage the practice rooms click on

Administration > Settings > Practice Rooms

The screen to add or edit practice rooms will be displayed to you.



Once you have saved a practice room you will not be able to edit the code, but you can change the name. You can also delete a practice room by ticking the checkbox on the required record. The deleted practice rooms will not be appearing in the appointment context menu.

To add a new practice room, type in a code and description on the first row of the grid and hit enter. Remember to save your changes before exiting. To learn more about grids please see the section working with grids.

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Legend

On the Main Menu go to Administration>Settings>Appointment Preferences

The legend screen has tabs for **Preferences** and **Type**.

Preferences displays the various icons and colors in the system. These icons and colors are associated with the appointment screen and can be reset from this form.

Practice work hours can be set.

The Appointment status grid enables users to create and edit an appointment status.



Only administrators are allowed to make any changes to the values.

The administrators can change the icons settings.

You can change the appearance of temporary appointments. Please click on the back color and fore color button to change the color of the temporary appointments on the appointment screen.

The staff roster color can be changed with the help of the change button located next to the staff roster color.

You can set the practice working hours. The appointment screen will be grayed out accordingly.

The grid contains the list of appointment statuses.

The records marked in blue are the system statuses and cannot be deleted.

You cannot change the description of the system statuses but you can change their name and color.

You can also add your own statuses which will then be available from the appointment context menu for you to select.

Billed, receipted and partially receipted statuses cannot be selected from the appointment context menu as these status are updated automatically.

Any statuses that you create can be deleted.

To delete a status which is not system defined, tick the deleted check box of that record and save your changes.

The deleted status will be then be removed from the appointment context menu.



Any changes are system wide.

See Also

Appointment: Appointment Right click Menu Options

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Staff Roster

Go to Administration>Settings>Staff Roster

A staff roster can only be created only for doctors or users that have an appointment column. eg Nurse, Allied Health etc

A user can make changes only to their own roster settings.

Administrators of the system can make changes to any staff's roster settings.

To view the staff roster select administration from the main menu and then select staff roster from the settings sub menu.

The staff roster screen will be displayed to you. By default the logged in user's roster will be shown.



If you want to view a different staff member's roster, then please select that staff member from the drop down on the top left corner of the screen. The working of the roster is quite similar to the appointment screen.



Please mark only the times you are available.

To mark a slot please type in relevant data and hit enter.

A roster record will be created.

The roster record can not be dragged across the days of the week.

A roster can be stretched from the top or bottom border.

To delete a roster, R click > delete.

Rosters cannot overlap.

To	delete a record,	select it and	hit delete.	The syster	n will pro	mpt you
for	confirmation.					

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Drop Downs

Go to Administration>Settings>Drop Downs

The system stores a list of drop downs where you can edit the values. Drop downs will be available to you if you are the administrator of the system or have the privilege to change drop downs.

To view the drop downs, select administration from the main menu and then select drop downs from the settings sub menu.

The drop downs form will be displayed.	

Select the type of drop down you want. The list of values currently associated with that drop down will be displayed in the grid. You can edit the values and close the form. Your changes are automatically saved. New values in the drop downs will be automatically appended when users select "Add New" from the drop downs present in the actual form.

For example if you want to add a new title for patients, please select "Add New" from the patient title drop down in the patient register screen.

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Card Reader

The software has a built in swipe card reader which can be used to read a patient's medicare number and the medicare valid to date.

To modify the card reader settings please select administration from the main menu and then select card reader from the settings sub menu.

The settings for the ca	rd reader will be displayed to you.	

The default settings will be present from before.

Users do not need to change any other settings for reading the medicare number of a patient from a medicare card except for the port if needed.

Please select the correct port where your card reader is plugged to.

You can test the port with the test button.

If the software does not find a port, an appropriate message will be displayed.

How to use the card reader

The card reader will help you to automatically populate the patient's medicare number and the medicare valid to date on an appropriate form. Currently the forms where you will be able to use the card reader are -

1. Patient Registration form

- 2. Details node of the patient clinical profile form
- 3. Patient Search form

If you do not want to use the card reader, you can deactivate it using the checkbox at the top of the settings form.

1

A compatible card reader has to be plugged in to your computer before you can use this feature of the software.

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User Preferences

Administration>Settings> User Preferences

Lock Time Interval

The application will lock itself up automatically after a specified amount of time if the machine is left idle for that time. You can change the number of minutes of the lock time interval or disable the lock of the application when you are logged into the system. To disable the lock up of the application please check the "Never lock my application" checkbox. For more information on how to lock the application see "Lock" under the session menu.

Practice Room Icon

As described in appointment section, a practice room can be associated with any appointment. When an appointment is set in a practice room, an icon is shown in the appointment to distinguish it from other appointments. If you do not want an additional icon to be present in appointments for the practice room, then you can uncheck the "Show Practice Room Icons in Appointment Screen" checkbox.

Startup Node on Clinical Profile

The clinical profile screen of a patient is made up of various nodes like appointments, current Rx, pathology request etc. You can select the startup node you want from here. Whenever you open a patient's clinical profile, by default, the startup node you select here will be displayed first.

Start Mode for records in Clinical Profile

When a patient's clinical profile is loaded, several records might be active or inactive. You might want to see only the active records of the patient once the screen is loaded. Please select the start mode for displaying the records here. The mode can be changed from the clinical profile as well.

Preview Bill / Receipt before print

You have 3 options to choose from whether you want to preview the bills or receipts before printing. If you select yes, the preview will automatically be displayed. Selecting no will directly print the bill or

receipt. If you select prompt, then the software will ask whether you want to preview the bill or receipt before printing.

Do not show Pathology Results to other doctors

This setting is relevant only for doctors of the system. If you check this checkbox, then the results which have been downloaded having your provider number will not be shown to the other doctors of the system. However, an administrator of the system can view all results. If you uncheck this setting, then the other doctors of the system will be able to view the results from the intray.

Prescription PBS / RPBS / Authority Color

This setting is relevant only for doctors of the system. When you are doing a drug search, the color of the results found will be set according to the colors specified here.

Append Current Rx changes / Pathology Requests issued to encounter notes

This setting is relevant only for doctors of the system. If you tick the checkboxes then any current rx changes and pathology requests issued will be flagged in the encounter notes of the patient.

Allow Brand Substitution in Prescriptions

By default brand substitution is allowed in prescriptions. You can uncheck that setting here.

Printing

Printing

The checkboxes present in this tab are for printing purposes.

Click to enlarge

The fields selected here refer to the default <u>practice profile</u>. Please check the fields you want displayed on the first page printed. Printing functions include the clinical profile, bill search, payment search, pathology results and the various reports.



Some settings in the general and printing tab require a restart of the application before changes may take effect.

Prompts

Prompts

- Check or uncheck the prompts you want displayed by the system
- Decide if you wanted to be warned by a prompt when prescribing for Elite athletes
- Set the warning level for drug interactions



Clinical Profile
Clinical Profile

See Also

Session: Lock

Appointment: Adding Appointment

Preferences: System Preferences

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System Preferences

On the main menu go to

Administration>Settings>Preferences>System Preferences.

System preferences are the settings which apply to all users of the system.

System preferences changes can only be made by Users with administrator privileges.

Appointment

• **Disallow Appointment Delete**Enter the number of minutes in the provided text box.

Users can't delete appointments after the specified number of minutes after the appointment is created.

Allow Temporary Appointment Delete

Temporary appointments can be deleted irrespective of the minutes setting above.

• Appointment Refresh Time

The appointment screen, when displayed on the screen, refreshes itself automatically after a specified number of seconds. Therefore schedule updates, appointment rescheduling, changes in status of an appointment can all be seen by you, when updated by any other user of the system from a different machine. You can set the refresh interval in the text box provided. The minimum number of seconds is set at 15.

Ask for Staff Key

The application asks for staff key from users before making various changes. For example the application will ask you

for your staff key whenever you register a new patient, create a bill, make a payment, make changes in the intray if you are a doctor. A form will be displayed when the system requires you to input your staff key for authentication. If this setting is unchecked, then the system will never ask for the staff key. It is recommended to keep this setting on in medium to large practices for audit purposes.

Administration

Bill Footer

If you want the software to print any text at the bottom of printed invoices then please enter the text required in the bill footer text box. You can leave it blank if you do not want any custom text to be displayed on your invoices.

Payment Footer

If you want the software to print any text at the bottom of printed receipts then please enter the text required in the payment footer text box. You can leave it blank if you do not want any custom text to be displayed on your receipts.

Networking	
SMS	
See Also Preferences: User Preferences	

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Reserved.

Appointment status

On the main menu Go To Administration > Settings

Reserved.

Click to enlarge
In the System Preferences a grid lays out the various statuses that are within the system. A user can create further status names by completing the grid.
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Appointment Type

Appointment Type

To set a patient's type of appointment right click their name on the appointment screen and select type

To create new Appointment types

Administration > Settings > Appointment Preferences and then click the Type tab

The features of an Appointment Type are

- Display name
- Font type
- Font colour
- Font size
- Background shape
- Background colour
- Associated appointment duration



When an appointment type is created then a person's appointment can be associated with the relevant Type.

Privileges

Administrator only.

Privileges can only be updated by Administrators of the system.

The Authorizations menu is only visible to Administrators of the system.

From the main menu click on Administration > Authorizations > Privileges.

The authorization form will be displayed to you.

First you need to select the login name from the drop down box.



Authorizations are **login dependant**. If one staff member has two different logins, then changes will take effect only when the staff member logs on with the login whose privilege has been changed. The other login will continue to have the earlier privileges unless they are changed.

The logins of the administrators of the system will not be present in the drop down. Administrators of the system have all the privileges and you cannot remove them individually.

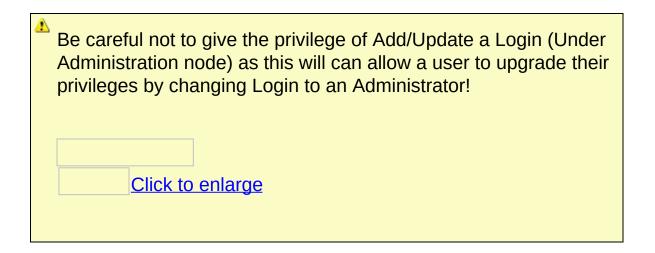
Once you select the login name, the categories tree will be filled up. There are three ways you can organize the privileges.

1. You can either select the parent node (General,

Administration, Practice report, Medical Records etc...), select the options you want to set and then click on apply child. When you click on apply child, then the selected options will be copied down through all the "children" under that particular node.

- You can also select individual child nodes by clicking on the + sign next to the parent node and then set the options.
 When you select the child node, the apply child button will be disabled.
- 3. You can apply a previously saved template to the login by checking the 'Link' check box and selecting the template name from the drop down. Click on apply template button and then save your changes.

Please click on save when you finish setting the privileges.



See Also

Authorization: Adding an Authorization Template | Modifying an Authorization Template | List of Authorization Templates

Adding an Authorization Template

As an administrator of the system you can keep a set of predefined authorization templates.

These templates can then be applied to new staff members when they are being registered in the system.

	they are being registered in the system.
	From the main menu click
	Administration > authorizations > templates > Add New
	The form to add a new authorization template will be displayed to you.
	The structure of this form is similar to the privilege form. Please type in the template name on top and then set the privileges for the template. After you have made your changes click on save.
S	See Also
	Authorization: Privileges Modifying an Authorization Template List of Authorization Templates

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Modifying an Authorization Template

As an administrator of the system, you can modify a previously saved template from the <u>list of authorization templates</u>.

See Also

Authorization: Privileges | Adding an Authorization Template | List of Authorization Templates

List of Authorization Templates

To view the list of previously saved templates:
From the main menu right click Administration > authorizations > Templates > List.
All the previously saved authorization templates will be displayed to you in a grid.
You can hit enter on any record, or select the record and click edit button or double click the record. This will display the saved template privileges on the authorization form.
Click to enlarge

Make your changes and click on save. The software will ask you whether you want to update the privilege for all logins. This means, that the logins which had been assigned the currently edited authorization template before, will get updated with the new template values currently being saved. Click on 'yes' on the dialog box if you want to update the logins or select 'no' if you want to leave the previous logins as they are.

See Also

Authorization: Privileges | Adding an Authorization Template | Modifying an Authorization Template

Recent Patients

View a list of the last 5 patients files that have been opened.

Patient Registration screen

Patient Registration Screen

Click to enlarge		Click to enlarge

The patient registration screen is divided into two sections.

1/ Details. This form contains the primary details of the patient like name, date of birth, contact and address details.

2/ other Details. This form stores data about the patient's other details like religion, ethnicity etc

Click on <u>Health Funds</u> to read information about storing private health insurance information.

Mandatory Fields in Patient Registration

Name

Date of Birth

Other fields in Patient Registration

Medicare Number

Title

Family Name

Post code, Suburb and State

Blood Group

Pension Status

Is Adopted

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Add New Patient

Steps to Add a new Patient:

1/On the main menu Click Patient>Add Patient.

<u>OR</u>

2/ Register a new patient directly from the appointment screen.

Click on a time on the appointment screen then type in some of the details of the new patient.

then hit enter.

The system will respond in one of two ways.

• The system gives a prompt to say that "this patient does not exist in the system".

Select the register button if you wish to enter all the patient's details and register the patient.

Select the temporary button to place just a temporary name into the appointment time. If a temporary appointment is created then the patient's details can be entered later. To do this Right click on the temporary appointment and select register from the drop-down menu.



• A match might occur for a new patient with a patient already

from the patient search form.
Click to enlarge
3. Clicking the "Add New" button will open the patient registration screen.
Click to enlarge
See Also ————————————————————————————————————
Patient: Modifying a Patient Patient Search Family Search

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in the database if there is a large number of patients.

The match might not be correct so instead click "Add New"

(e.g John Smith)

Reserved.

Modifying a Patient

To modify a patient's details, click on Details (F2) under the Administration section of the Navigator in the Clinical Profile form.

Click on the "Clinical Profile" link to find out more about using this functionality in GPComplete.

See Also

Patient: Add New Patient | Patient Search | Family Search

Patient Search

To search for a patient, on the main menu click on patient and then search patient.
A search form will be displayed to you. You can search for patients from this screen by typing any combination of • name
medicare number
date of birth
patient number
Patient number is an automatically generated number during patient registration which is displayed on the top in a patient's clinical profile. You can make also make use of <u>wildcard</u> characters when searching.
The "Temp" button is disabled when you have opened the search from the menu. If the patient search screen is opened from Appointment screen, then the "Temp" button is available for creating a temporary patient appointment.
Click to enlarge
If your search matched any records, then the patients will be displayed in the grid below. Click to enlarge

You can hit enter on any searched record. This action will take you to

the clinical profile of the patient if you have opened the search form from the menu. Otherwise, if the form was opened from appointment screen, then the selected patient's appointment will be created.

Options

- 1. **Include Deceased Patient -** Setting this option will include patients who are marked as deceased.
- 2. **Include Inactive Patient** Setting this option will include in the search results patients who have been marked as inactive. If this option is switched off, the search results will output only those patients who are currently active.

Context Menu Options

If you right click on any searched patient (the search form being opened from the main menu), a context menu will popup.							
<u>Future Appointments</u>							
Bills Outstanding							
Write Letter							
See Also							
Patient: Add New Patient Modifying a Patient Family Search							
Appointment: Adding Appointment							
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Family Search

To search for families in the system, on the main menu click on patient and then search family. Family search can also be opened from the patient registration screen when you want to include the patient in an existing family.					
A search form will be displayed to you. You can search for families from this screen by typing any combination of					
family name					
• patient name					
medicare number					
You can also use the wildcard characters when searching. Click to enlarge					
If your search matched any records, then the families will be displayed in the grid below. Click to enlarge					

Click the "+" sign to expand and view the family members in the family. The head of the family is shown in blue color. You can hit enter on any searched record if the family search is opened from the patient registration screen. This will include the patient being registered to the selected family.

Context Menu Options

If you right click on any searched family a context menu will popup.					
Make Head					
<u>Cut / Paste</u>					
You can also drag and drop the family members from one family other with the help of the mouse.	to				
See Also					
Patient: Add New Patient					
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Patient Health Record

To open a patient's Clinical Profile

1. Double click the name on the Appointment screen
2. Right click and select Clinical Profile
3. Search thru the Main Menu
Patient> Search Patient
Select the patient from the grid by scrolling down with the arrow key and hitting enter or double click on the name
Click on Clinical Profile to view the help files.
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Clinical Profile Screen

The Clinical Profile

The Patient's Medical Records are grouped in three categories

- Information -
 - Demographic information
 - Family Members
 - Recalls Reminders and Warnings
 - Bills and Appointments
- Medical Records
 - New Notes
 - Old Notes
 - Measurements
 - Current Rx
 - Past Rx
 - Obstetric (IF female)
 - Immunizations
 - Allergies
 - Medical History
 - Family History
 - Tobacco/Alcohol
 - Occupation/Social
 - Referral/Request
 - Summary
- Tests / Reports
 - RESULTS

- Pap smear
- Pathology Request
- Imaging Request
- Correspondence
- Devices

The Clinical Profile Screen is resizable and can fill the entire screen.

The system remembers the size of the last window closed.

The Navigator

The Navigation pane to the left has a drop down tree which contains all the different nodes.

Which nodes are seen by which users depends on what privileges have been assigned to that user by the administrator of the system. For example a doctor will see more nodes than a receptionist.

When you click on any one of the nodes, the respective screen is displayed on the right hand side.

Go to <u>user preferences</u> to select which node you prefer the screen to display when the Clinical Profile Screen is opened.

The Header

▶ Show All

The header of the clinical profile displays basic patient information including the patient name, the patient number, date of birth and the head of the family if the patient belongs to a family.
bitti and the field of the family if the patient belongs to a family.
Patient Due and Family Due
It displays the amount due to the practice together with the total family balance. If you click on the patient due or the family due, the system will display the outstanding report.
Timer and DNA (Did Not Arrive) count
The top right corner of the clinical profile has a timer which is automatically started when you open the clinical profile. You can pause and restart the timer with the help of the blue button below the timer. The DNA counter shows the ratio of the number of appointments where the patient did not show up to the total number of appointments for the patient to date.
Allergy Text
Allergies if any are displayed in red on the top bar. Point the mouse on the text and it will scroll to the end.
Show Active / Inactive Drop Down

This drop down is used to filter the records on the basis of their active and inactive status. For example if you click on recall, the records have a property called active. Depending on the value of the drop down, the records will be filtered.

Not all the nodes of the clinical profile are associated with this drop down. Only records which can be made active or inactive is affected by the status of this drop down.

Blood Group

The blood group can *only* be displayed if a the value has been imported into the system from a recognized pathology provider.

If the blood group is **RH** *negative*, then the value is displayed in green to emphasize it's importance during antenatal care.

The following list provides various nodes available for you depending on your login privileges.

Details - The basic details of the patient

1. Other Details - Other information relating to the patient

Family Members - List of family members of the patient

Appointments - List of all appointments of the patient

Recalls - List of all recalls of the patient

Bills - List of all bills of the patient

New Notes - The main gateway to entering notes in the EHR

- 1. System notes
- 2. Problem oriented notes

Old Notes-List of all old notes of the patient

Summary - Medical Summary of the patient

Current Rx - Displays the current medication of the patient

Past Rx - Displays the previous medications of the patient

Obstetric - Obstetric details of the patient (Only for female patients)

<u>Immunisations</u> - List of immunisations given to the patient

Allergies - List of allergies of the patient

Medical History - Medical history records of the patient

Family History - Family history records of the patient

Tobacco / Alcohol - Tobacco and alcohol consumption of the patient

Occupation / Social - Occupation and social history of the patient

<u>Path. Request</u> - Displays the screen where you can issue pathology requests for the patient

Path. Results - Displays all the pathology results linked with the patient

Path. History - List of previous pathology requests issued to the patient

Rad. Request - Displays the screen where you can issue radiology requests for the patient

Rad. History - List of previous radiology requests issued to the patient

Correspondence - List of all correspondence with the patient

Pap smear - Lists a record of pap smears for female patients 12yrs or older.

Changes within a node will set the node's colour to red.

The currently selected node is always highlighted in the node selector.

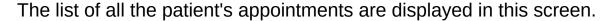
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Bills

Bills

This screen displays all the bills for the patient.
Click to enlarge
By R clicking on a bill in the grid a context menu will pop up to give the option of either viewing the bill or printing the bill.
or
Double click the bill
or
hit enter on any one bill in the grid to view the bill details.
Click to enlarge

Appointments



Click to enlarge

The appointments are displayed in quarterly groups on the grid.

Appointments for the current date are displayed in blue.

Future appointments of the patient are not displayed on this grid. To view future appointments please take a look at <u>Appointment Search</u>.

If you double click or hit enter on any one of the appointments then the details will be displayed.

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Recalls

The recalls screen will display the list of all recalls for the patient.

Right Click on a recall to view a sub-menu

- Add
- Add action
- Edit/view
- Delete recalls

Click to enlarge

Add

Select add then click an option from the favourites list.
To add a new favourite click on Add Favourites.
Click to enlarge

The mandatory fields while saving a new recall are the recall reason and the due date. Due date cannot be earlier than current date. You can select the date with the help of the date drop down or type in a number in the 'after' text box and select days, weeks, months or years from the drop down to populate the due date. Click on save after you have made your changes. The recall will not be ticked as visited unless you manually do so.

Marking a recall as visited can be achieved in two ways. You can click on the visited column in the grid to mark the recall as visited. Once you mark a recall as visited, you will not be able to edit the recall. Secondly, if a patient has a recall which is not visited, and you try to open the patient's clinical profile, the software will message you whether you want to mark the recall as visited. If the patient has more than one recall which has not visited, then the list of recalls which are not visited will be shown to you in a grid. Please check the recalls you want to mark as visited and click on save.

Add Action

Click to enlarge

To add an action to a recall, right click and select Add Action.
This will attachs an action to the recall and also insert a log in the
medical records with the staff member's name, date and time stamp.

Edit/View

To edit a recall, right click on the grid and select edit/view. You cannot
edit a visited recall but you can view the details. If the recall is not
visited then you can make changes to the recall and update the data.
Click to enlarge

Delete

If you have the privileges, then you will be able to delete recalls	. Right
click on the recall record and select delete.	

The software will prompt for confirmation before deleting the recall.

Cli	ck to enlarge	<u>9</u>		

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Family Members

The Family Members - all the family members are listed

open their Clinical Profile by

- double clicking on their name
- scroll down with the down arrow and hit enter

The head of a family appears in blue.

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Details

Details

The details screen displays the basic details of a patient. You can modify the details in this screen and click save.

Tab to

- Details
- Other Details
- Health Funds

This screen is used to view or modify a patient details.

Click to enlarge

Other Details



The remaining details of the patient are displayed in this screen.

The patient's blood group cannot be directly entered into the patient's details. This is a restricted system function that imports the result directly from a valid pathology result.

The pension status cannot be set to Full DVA or Partial DVA unless a valid DVA number is provided.

Health Funds

Click to enlarge
R Click on the relevant fund in the list
Complete the details for the Health Fund Record
Go to IMC to learn how to submit claims to Medicare Australia .
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Medical Records

Tracking actions

The software will track actions in the encounter notes by creating a written flag.

- Obstetric notes additions
- Creation of a recall
- Creation of a pathology request
- Creation of a radiology request
- Prescriptions that are added, deleted or repeated.

This feature can be turned off by unchecking the boxes in <u>User Preferences</u>

Problem Oriented Notes

The software will attach these actions and relate them to different Problems in the one consultation

if

the User Preference setting option **Use Multiple Problem Related Notes** is checked on.

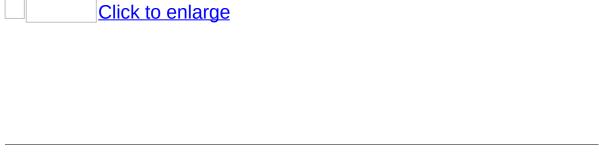
	Click to enlarg	16
	Chick to Chick	<u> 1</u>

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New Notes

Writing new notes

- Use Rich Text Formating to enhance the appearance of your notes
- View your Old Notes in the same window while entering your current notes.
- Save time using the System Notes which more closely mimics the way doctors write their records.
- Use shortcut keys to insert AutoTemplates.
- Create Problem Oriented Notes very quickly and simply in a highly organized way with all actions related to each problem grouped together and made available for re-editing in the one consultation.
- Access system images and your own images in a flexible way that also allows you to mark and annotate each image.



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Spell check etc.

Hold down the ALT key + O

This will provide a list of formatting options

Click to enlarge

Systems

Systems provides fields for recording notes in an organized way for each system.

To open systems click on the down arrow and the tree will expand then click on the relevant system for which you wish to enter data.

then click on the relevant system for which you wish to ent
e.g.
Measurements
Click to enlarge
Nervous system
Click to enlarge
Cardiovascular
History
Click to enlarge
Examination
Click to enlarge

Respiratory

History	
Click to	o enlarge
Examination	
Click to	o enlarge
 Gastrointestina 	I
History	
Click to	o enlarge
Examination	
Click to	o enlarge
Genitourinary History	
Click to enla Examination	<u>rge</u>
Click to enla	<u>rge</u>

Locomotor
History
Click to enlarge
Examination
Click to enlarge
ROM (Range of Movement)- a matrix of descriptions for all joints provides the relevant ROM values
Click to enlarge
Lymphatic
Click to enlarge
Breast
History
Click to enlarge

Examination. Breast lumps can also be added by selecting Add.

	Click to enlarge
•	Skin
	Click to enlarge
•	ENT
	History
	Click to enlarge
	Examination
	Click to enlarge
•	
Eyes	
History	

Click to enlarge

Examination

Click to enlarge Mental Health	
History	
Click to enlarge	
Mental Health Examination	
Click to enlarge	

Problem Oriented Notes

Add a problem to the notes

Click to enlarge
To add a second problem after adding notes about the first problem just click Problem once again
You'll be prompted whether or not to add New Notes Answering Yes will create a fresh entry Answering No will append the second problem to the first problem
Click to enlarge
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Old Notes

Viewing Old Notes

Old notes he clinical profile screen has three panes.

The left pane contains the three headings of Administration, Medical Records & Test/Reports.

The middle pane lists in sequence the date/doctor/activity status/diagnosis of all the consultations.

The right pane records in verbose form all the actual encounter notes, examination findings, diagnoses and plans for each individual consultation recorded by all doctors that have seen the patient.

Encounter notes can be selectively viewed by clicking on a particular date in the central pane. Click on the 'Show All' button at the bottom of the clinical profile to show all the encounter notes.

Filtering Problems in Old Notes

Annotation of Old Notes

Notes taken prior to today cannot be edited but the can be annotated.

Right click on the date relevant to the notes you wish to annotate and select edit.

An Annotation box will come into view and this will make an entry in the notes stamping the name of the user and date and time of the annotation.

Click to enlarge
Click to enlarge

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Summary

The summary screen displays the patient's medical summary. Click on Summary in the Medical Records tree or use a <u>Hotkey</u>. (Ctrl + S)

The summary contains the patient's medical history, family history, current medication, allergies and tobacco / alcohol data. If you click on the links on the top of the summary sheet, then the appropriate summary will be scrolled into view. The summary sheet can be printed of with the print button located on the bottom of the clinical profile. It is the snapshot of the patient's medical data which is useful for doctors.

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Obstetric

The obstetric node in the clinical profile will only be visible if you have authorization for it and the patient is a female over 11 years of age.

Click to enlarge

This screen consists of a grid at the top which shows the obstetric history of the patient.

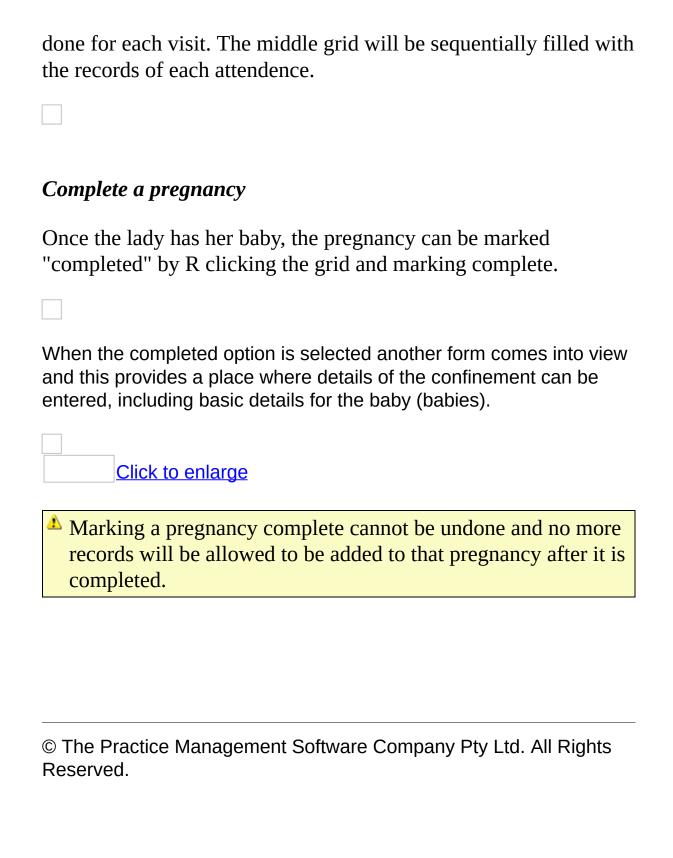
An active pregnancy is in a RED colour at the top of the grid. Past pregnancies are in BLACK and they follow underneath.

Brief pathology results and ultrasound reports can be entered into this form.

The progressive antenatal notes of the patient will fill the grid underneath if an active pregnancy is selected on the grid at the top.

Context Menu in Obstetric
Add new pregnancy
Entering the <i>LNMP</i> will add a new pregnancy for the patient. This data can be edited again at a later date if the information needs to be revised. Once this information is saved, you can then begin adding pregnancy notes.
Scan date – You can input a scan date in a situation whereby the LNMP is unknown and the system will calculate an EDC by scan. If you check the 'Use scan date for EDC' then the gestation in the pregnancy notes will be calculated based on the scan EDC.
Add pregnancy notes
After the system creates a new pregnancy then sequential antenata notes can be recorded by opening a new form. To do this R click the active pregnancy record which is now in RED.
click on add notes and this next form will appear.
Click to enlarge

Enter your antenatal notes in this form and then click save. This is



Occupation Social

You can store the patient's occupational and social history in this screen.
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Reserved.

Tobacco Alcohol

Data can be stored regarding:-

- tobacco
- alcohol consumption
- substance abuse



The patient's summary will carry information stored here concerning tobacco and alcohol useage.

Medical History

Adding / Updating Medical History

The medical history screen lists the medical history records of the patient.
Click to enlarge
Right click to add, edit or delete medical history records.
A new form will be displayed when you select Add. In this situation, CABG x 3 has been recorded at age 91 years.
If you select an exact date the year and age of the patient will automatically populate the rest of the fields when you hit the tab key. If you do not know the date, then you can enter the year or the age of the patient instead.
Any existing medical conditions already recorded in the medical history will be listed over on the right hand side of the form.
Previous medical conditions can be modified from this screen. If you double click on any record from the clinical profile screen of the medical history or select edit/view from the context menu, then you will be able to update that particular medical history record.
Click to enlarge

Deleting Medical History

You can delete medical records only if you have permission.

Right click on the record and select delete. The software will ask for confirmation before deleting the record.

Family History

The family history screen lists the family history records of the patient.
Click to enlarge
Family history works in a similar way to medical history.
If the patient is <u>adopted</u> , then this information will be displayed on top.

Adding / Updating Family History

Right click on the grid and from the context menu click on add.
A new form will be displayed to you where you can add a new record.
Click to enlarge
The existing family history conditions will be displayed to you on the right hand side. You can modify previous conditions from this screen. When you click on any previous condition, the details will get populated. If you want to add a new record instead, click on the clear button first.
If you double click on any record from the clinical profile screen of the family history or select edit/view from the context menu, then you will be able to update only that particular family history record. Previous conditions will not be shown on the right hand side.
Click to enlarge

eleting Family History

You can delete a family history record if you are authorized to do so. Right click on the record and select delete. The software will ask for confirmation before deleting the record.

Allergies
The allergy node displays the allergy information of the patient.
To add an allergy right click on the grid and select add. This will open a window where you can search for the drug.
You can either search allergy by drug name or by class. Searching by drug name will give a list of drugs while searching by class will give a list of substance class. Search for a drug by typing in a part of the name or class. Double click the drug. You can assign allergy in three ways.
trade name
• generic
• class

Assigning Allergy

- 1. Trade name Assigning allergy to a particular trade name will give a warning about the allergy during prescribing only for that particular brand.
- 2. Generic Assigning an allergy to a particular generic drug will give a warning only while prescribing that particular generic drug. Other salts of that drug will not be flagged in the warning.
- 3. Class Assigning allergy to a class will give the widest interaction warning as it will interact with the particular generic drug and all generics in the same substance class. Where ever possible PMSC recommends selecting Class for an allergy.

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Immunisations

	night also contain an immunisation plan.
The diagram below s plan.	nows a patient immunisation screen without a

Adding a Vaccine

To add a vaccine for the patient, right click on the grid and select add
other from the context menu. The vaccination form will now be
displayed on the screen.

Select a vaccine from the drop down, make changes as necessary and click on save. The vaccine will be added to the list of patient immunisations.

Adding a Plan

To add a care plan for a patient, right click on the field and select add plan. Care plans are available only for infants depending on their age. A form is displayed to you from where you can select the vaccination plan.

The immunisation screen with screen below.	n a care plan included will look like the
	Click to enlarge

The vaccines which are overdue will be displayed in red.

Editing a Vaccine

You can edit any vaccine as long as its status is not completed. As soon as the vaccine status is updated to be completed, then only the user who has added the vaccine or a system administrator can edit its details.

Deleting a Vaccine

Only the system administrators can delete a vaccine. If a vaccine is part of a care plan and the administrator deletes that vaccine, then the whole care plan will be deleted. The system will ask for confirmation before deleting any vaccine. To delete a vaccine, right click on the record and select delete.

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Past Rx

Reserved.

Click to enlarge
Past Rx screen lists all previous medications.
R clicking on a drug in the list will allow a user to delete a past Rx, or re-prescribe a past Rx if it is not already in the current Rx screen.
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Current Rx

The current Rx node of the clinical profile allows a doctor to create prescriptions for the patient. Only doctors are authorized to prescribe medications. The doctor must have a prescriber number saved in the staff details before the system will allow prescriptions.



Context Menu Options for Current Rx (R click on any drug in the list)



Add Item

Prescribe a drug to the patient. For details see Adding Current Rx

Delete

Delete a drug from patient's current Rx.

Alternative

Show alternative for the selected drug.

Select/deselect

Mark the selected drug for prescribing in the current visit.

Change Dose

Change the dosage information of the drug.

Change PBS Category

Change the PBS category for the prescription.

Change Qty

Change the quantity prescribed.

Reg 24

Mark the drug for regulation 24.

Detail

This will show the details about the drug, like PBS info, price info, indications, contra-indications, authority indication etc.

CMI

CMI is the consumer medicine information. This might not be available for some of the drugs

PI

PI is the product information about the drug. This might not be available for some of the drugs.

Adding Current Rx

To prescribe a new medicine to the patient right click on current Rx screen and select add item from the context menu. This will open a drug search window. Type the first few letters of the drug you want to prescribe and hit search. This will give you a list of drugs and their details. For more details about drug search click here.

Double-click the drug you want to prescribe from the list. This will open another window where you can specify the dosage etc. for the drug.

Click to enlarge

Here you need to specify dosage, frequency and instruction. None of this is mandatory. This window also has a check box "Save as default dose". If this is checked it will save the dosage, frequency and instruction for that drug so that if the same medicine is prescribed again by the same user these will be pre-filled with the values.

The "Other" button lets you specify custom instruction for the drug. Clicking the other button will open another form. For more detail about custom instructions <u>click here</u>.

At the bottom there are three buttons "Regular" "Once Only" and

"Cancel". If "Regular" is selected then the drug will be added to the list of regular medications and will stay in the current Rx screen.

"Once only" will prescribe the drug for the patient only for this visit and therefore the drug will not stay in the <u>Current Rx</u> list of regular medications. Selecting cancel will cancel prescribing this medicine.

While prescribing the medicine the software may give warnings for allergy, interactions with other drugs, pregnancy, sports. The doctor can decide not to prescribe the drug when any such warnings might occur.

Drug Search



To search a drug, enter the first few letters of the drug and hit enter. Alternatively you can search a drug by class. When you click search by class it will open a box on the left side with a list of classes of drugs. Besides the name of the class there are + signs which when clicked will open the sub classes within that class. If you click on a subclass you will see the list of drugs in that subclass on the right side.



The drugs list come in different colors depending upon the PBS type of the drug. The legend of colors is shown at the bottom of the drug search screen.

Drug search context menu

<u>Click to enlarge</u>

In this example, the search for Elocon reveals, blue =PBS, green =DVA

Prescribe

Prescribe is same as double clicking an item. For details go to

Adding Current Rx.

Add to fav

This will add a drug to your favorites list. You can retrieve your favorites list by using the "Favorites" button in the drug search.

Details

This will show the details about the drug, like PBS info, price info, indications, contra-indications, authority indication etc.

CMI

CMI is the consumer medicine information. This might not be available for some of the drugs

PΙ

PI is the product information about the drug. This might not be available for some of the drugs.

Customized Instructions

Clicking the "other" button on the dosage screen will open the custom instruction screen.

Click to enlarge

Here you can type a custom instruction. Optionally you can also check the "Save New". If you check "Save New" you must give a name to the instruction in the box below.

Once you save it with save new checked, the next time you open the custom instruction again it will have the previous saved items on the left side. You can click on them and it will fill the instructions associated with the selection. You can then change the instructions if you wish and if you want to see the changed instructions next time for the selected item then check "Update".

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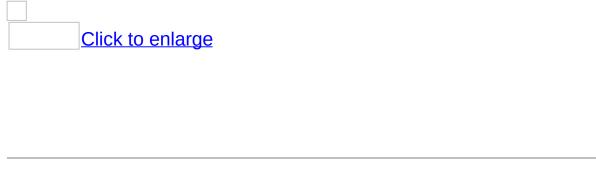
creating own Rx list

Click Resources>Own Rx

A doctor can create their own user defined drug recipes.

This might be useful for topical preparations or herbal and alternative medicines.

When using this tool the system has the ability to assign the new recipe to a substance class to cross check for drug interactions.



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Devices

Devices

ECG	AND	SPIF	ROME	ETRY

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Correspondence

The correspondence node

This screen displays the correspondence list with the patient.

The options for the display of correspondence can be selected.

- Sent
- Received
- All

New data entry

R click on the grid to view and select an option from the context menu to enter new correspondence record.

A new entry can be entered by selecting

- Add
- Scan
- Store file
- Write letter



Add

Right click on the grid and select add from the context menu to add a new correspondence. A new form will be displayed to you where you can add the correspondence.



Select the correspondence type from the drop down. Add the subject and notes if required and click on save. The new correspondence will be added to the grid.

Scan

Select scan to $\underline{\text{scan}}$ a document into correspondence. Click on the link.

Store File

You can store files for a patient with the help of the store file menu After you click on store file, you will have to select the file to store
from the file browser which is displayed.
Double click the file you want to store.
After you have selected your file, then enter
1. a name
2. Subject type
3. Date

Click Ok button when you are done.

The file will be stored on the server.

Ensure the <u>GP Service</u> is running. If GP Service is not running then you will not be able to store files.

Editing a Correspondence

To edit a correspondence, right click on the record you want to edit. This will display the correspondence form where you can make changes. If the record is a file which you have stored then double clicking will open the file.

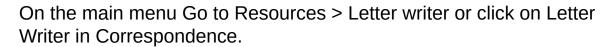
Editing the subject of a Correspondence

The edit subject menu will be enabled only for records which are type of a file.

Deleting a Correspondence

Select delete from the context menu to delete the correspondence. The software will ask for confirmation before deleting the correspondence. If the correspondence is type of a file then the file will be deleted from the server.

Write Letter





Click to enlarge

After completing the template go to File > Save as Template

A grid will be displayed to you with the list of templates present in the system.

Type in a name for your template and click on save.

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Radiology History

This screen displays the list of radiology requests which have been previously issued to the patient. You cannot make any changes to the previous radiology requests. You can print previous radiology requests from this screen. To print a previous request, select the record on the grid and click on the print button at the bottom of the clinical profile screen.

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Radiology Request

The radiology request screen helps doctors to issue radiology requests. You will need to have a valid provider and a prescriber number saved in your staff details before you can issue a radiology request. The radiology request screen is similar to the <u>pathology</u> request screen.

Click to onlarg	
Click to enlarg	

Steps to issue a radiology request

- 1. **Select the radiology** From the drop down select the radiology you want to issue the request to. The default radiology will be pre-selected.
- 2. **Choose a favorite** If you have saved your <u>radiology</u> <u>favorites</u>, you can select the favorite here if you want.
- 3. **Type the notes** Please enter any notes you want which will be displayed in the notes text box of the radiology request form.
- 4. Select required tests The various requests or tests available for you to select will be displayed on the requests available grid. You will have to select the required tests and put them in the selected requests grid on the right. You can select requests in two ways. You can select the request and click on the '>' button to move the request to the right. You can also drag and drop the request from left to right grid. Multi select of requests are allowed.

You can also <u>add your own requests</u> and they will be added to the list.

5. **Fill Copy Reports To -** Select contacts from your address book to add to this section.

After you have selected the needful, please click on print to print the radiology request. When you click on print, the request will be automatically saved. If you do not want to print, but want to save the request for later use, then click on save. You can view radiology history in the clinical profile where the past requests are saved.

How to fill Copy Reports To

Right click on the grid and select search from the contact menu.
The <u>address book search screen</u> will be displayed. Search for the contact and double click to select the contact. You cannot add a contact in radiology request where a contact name is not present.
You can add a new contact if you like by selecting the add new menu. A new address book entry will be created and added in the grid. A contact name will have to be present if you are adding a contact from here.
You can also remove contacts already added to the section by selecting the remove menu.
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Pathology History

This screen displays the list of pathology requests which have been previously issued to the patient. You cannot make any changes to the previous pathology requests. You can print previous pathology requests from this screen. To print a previous request, select the record on the grid and click on the print button at the bottom of the clinical profile screen.

	Click to enlarge
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Pathology Result

The list of all pathology results assigned to the patient from the Intray will be displayed in this screen.
When you select any record on the grid above, the pitt data associated with the result. if any, will be displayed in the text box below. You cannot modify the pitt data. When you double click any record, the pathology result form will be displayed. Please see the pathology result section of the intray for more information. Some of the options will will be missing as this result is already assigned to a patient.
A result marked with high priority will be displayed in red on the grid.
Yiewing / Printing Summarized Results You have the option to view and print summarized results. Use the
control and shift keys of your keyboard to multi select the results you want to view and print together. Right click on the grid and select view summarized.
A new form will be displayed to you where you can print the results.
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Printing a Pathology Request



This feature allows doctors to issue pathology requests.

- a valid pathology laboratory provider is needed
- a valid doctor provider number is needed

Steps needed in printing a pathology request

Click to enlarge
Select the pathology laboratory provider - Path. labs that have been entered into the system will be listed by clicking on the down arrow.
A preferred Pathology Lab can be set as a default. This obviates the need to select a particular laboratory each time you need to print a request.
Click to enlarge

1. **Type the notes** - Relevant clinical notes can be typed by clicking the mouse in this box or Alt + n.

Click to enlarge

2. Select required tests -

The hard way.

There are an enormous number of tests stored in the table. These tests can be searched by either the <u>test code</u> or the <u>test description</u>. Each test has a code and a lot of them are not intuitive. The test description searches the first few letters of the test name.

Once a test(s) is selected it needs to be placed in the

request box on the right side of the form by either

- double clicking
- checking the > arrow
- hitting the enter key
- drag & drop

The easy ways

- 3. You can <u>add your own requests</u> and they will be added to the list.
- 4. You can choose <u>pathology favorites</u>, then you can select a favorite which will then group a collection of tests together.
 - **Select required observations** Select the required observations for the test by ticking the observation records if you want.
- 5. **Copy Reports To -** Select contacts from your address book to add to this section.

After you have created a request then click on print or Alt + P to print the pathology request. Please make sure you have the right paper in the printer before printing. When you click on print, the request will be automatically saved. If you do not want to print, but want to save the request for later use, then click on save. You can view this request in the pathology history in the clinical profile where the past requests are saved and re-issue the request again if needed.

How to send cop	ies of reports	to other doctors.
-----------------	----------------	-------------------

Right click on the grid and select search from the contact menu.
The <u>address book search screen</u> will be displayed. Search for the contact and double click to select the contact. You cannot add a contact in pathology request where a contact name is not present.
You can add a new contact if you like by selecting the add new menu. A new address book entry will be created and added in the grid. A contact name will have to be present if you are adding a contact from here.
You can also remove contacts already added to the section by selecting the remove menu.
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Pap smear

Pap smears can be recorded for female patients 12yrs or older.

Previous records are stored in the grid.

New records are added to the Pap form.

- Date of the pap smear
- Pap smear result
- Check box for Endocervical cells & HPV
- Comments box to store free text

Click to enlarge

Appointment Prerequisites

Required Prerequisites:

To create an appointment at least one "undeleted" doctor must be registered in the system.

R

For a *doctor* to be recognized by the system they must have a valid *provider number*.

See Also

Appointment: Adding Appointment | Modifying
Appointment | Deleting Appointment | Search Appointment

Doctor specific appointment time interval

Appointment Time interval can be made specific to each doctor.

On the main menu Click Staff> Search Staff> (Open the Staff Record).

At the bottom left hand side there is a drop down box- "App Interval".

Select here to change the Doctors preferred time interval.

Click to enlarge

Appointment time interval

Adjust the appointment time interval.

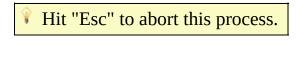
The appointment time interval can be adjusted by clicking Administration->Settings->Legend.

This is a system wide setting.

The default setting is 10 minutes.

Adding Appointment

- 1/ Click once on a suitable time on the appointment screen.
- 2/ Type the name of the patient in the format (lastname, firstname) or just a few letters of each of the last name and first name separated by a comma then hit the enter key.



Click to enlarge

If a matching patient is found in the database, then a list of patients opens on the search form.

Select a patient by :-

- 1/ double click the selected patient
- 2/ clicking once on the selected patient and hit enter.
- 3/ scroll with the down arrow key onto the selected patient and hit enter .

The appointment will be created for the patient on the appointment screen.





If the search does not match any patient in the database, then the system will prompt you to either go ahead and register this patient name as a new patient or create the appointment with a temporary patient name (a patient who is not registered in the system).

Click to enlarge

You can also create a temporary patient appointment by clicking the "Temp" button in the Patient search screen if the "lastname" entered makes a match with a patient already in the database but <u>is not</u> the one you were looking for.

Fit "Esc" on the keyboard to cancel the addition of the appointment.



Adding an appointment is not permitted in the Week View and Month View mode of the Appointment Schedule. For more information please take a look at "Appointment Screen Features"

ee Also

Appointment: Modifying Appointment | Deleting Appointment | Search Appointment

Modifying Appointment

To move an appointment - drag and drop it.

To increase the length of an appointment - stretch it by dragging the bottom border.

To change the name of a patient, right click on the appointment and select from the submenu "Change Patient".



If the appointment has been been billed or receipted then it can't be modified or moved.

An appointment on a previous date cannot be modified or moved.

Click to enlarge

Context Menu Options in an Appointment

ee Also

Appointment: Adding Appointment | Deleting Appointment | Search Appointment

Deleting Appointment

Deleting an appointment requires a user to have this <u>permission</u> which can only be authorized by the administrator of the system.

1/ Click on an appointment and hit the delete key. The system will prompt you for confirmation.

2/ R click on an appointment, then select delete

Click to enlarge

If you can't delete an appointment then speak with the system administrator about assigning you permission to do so.

Appointments cannot be deleted after a certain amount of time e.g.: 10 minutes. The system administrator can change this time interval. Attempts to delete an appointment after a set number of minutes will be automatically given the status "cancelled" provided the appointments have not been billed or receipted.

This feature can be turned off by the system administrator if required.

For more information about appointment delete setting see "<u>System Preferences</u>".



You cannot delete an appointment for a previous date.

See Also

Appointment: Adding Appointment | Modifying Appointment | Search Appointment

Search Appointment

Appointment search gives three options for a patient's appointment:
all the appointments just future appointments appointments within a defined date range
On the main menu click on appointment and then search.
Fill the search form using the options as needed and the appointments will be displayed. Use a <u>wildcard</u> if needed.
If your search matched any records, then the appointments will be displayed in the grid below.
Click to enlarge
"Go to" the appointment by R clicking it and selecting "Go to". The appointment screen will jump to the patients appointment.
See Also
and the second s

Appointment: Adding Appointment | Modifying Appointment | Deleting Appointment

Add the Waiting Room to the appointment screen

The appearance of a *waiting room* on the appointment screen is activated by a system preference. Administration> Preferences> System Preferences Click to enlarge The *waiting room* appears as another column in the appointment book. Click to enlarge "Walk ins" or patients who come to the practice without a prior appointment can be added to the *waiting room*. Based on the availability of the doctor they are moved (Drag n' Drop) from the *waiting room* to the Doctor's column. The system preferences can be set to restrain Doctors from moving patients from the waiting room. Limitations of the waiting room. Patients can not be billed from the waiting room Medicare Australia cannot be accessed • Patient Check cannot be performed

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Appointment Right click Menu Options

Right click a patient's Appointment to reveal the Sub Context Menu

▶ Show All

Click to enlarge **Type Status RoRoom Detail** Patient Check (HIC) **Medicare Australia Private Bill Quick Bill** View Bill **Change Patient Clinical Profile Register Delete** Send SMS

<u>medi</u>	<u>cal ce</u>	<u>rtifi</u>	<u>cate</u>
<u>Can</u>	Com	<u>е Е</u>	<u>arly</u>

ee Also -

Appointment: Adding Appointment

Schedule Buttons
The appointment screen has the following buttons related to the schedule:
Refresh
Day View
Week View
Month View
Work Week
Today
Doctors drop down
You can select a single doctor to be viewed in the schedule from this drop down.
Free time
The find button searches for the free time specified in the text box in minutes. The search is limited to 2 days and takes place from the

current time or the selected schedule region if you want to search from a later time. If no free time is found by the schedule then it

Appointment Screen Features

displays a message to the user otherwise a region in the schedule is highlighted wherever the free time slot is found. Free time is dependent on the Staff Roster settings.

Print

The print button on the top right hand corner of the appointment form prints the default appointment schedule screen.

Calendar

The calendar in the appointment screen points to the date of the schedule. You can select a single date or a number of dates to view the schedule for those dates. If you press today, the calendar returns to the current date.

Waiting room

The waiting room displays the list of patients whose status is set to "waiting".

If you are logged in as a doctor, the waiting room will display only your patients who are waiting.

If you are logged in as an administrator or you are not a doctor, then the waiting room will display all patients who are waiting. Patients are removed from the waiting room when their appointment status is changed from "waiting" to some other status.

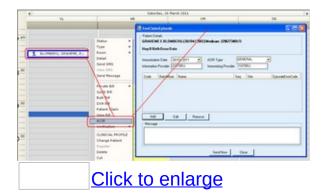
The waiting room grid has a context menu which is identical to the

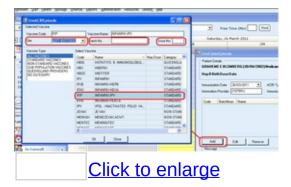
"Appointment Context Menu".
Doctors
You can select any combination of doctors you would like to see in your appointment screen. The system will not allow you to uncheck all the doctors. The system will remember your settings and will be saved for then next time you login again.
Details
The details box is only visible to doctors and administrators of the system. It gives the user the total amount of bills and payments made for yesterday and today. If you are a doctor, these amounts only refer to your bills and receipts. For administrators, the amounts will be the total for all the doctors.
Inbox
The inbox is a shortcut to view your messages. The number of messages is updated dynamically as and when anyone sends you a message. Clicking on either "Total Messages" or "New Messages" will retrieve your messages.
See Also
Appointment: Adding Appointment

ACIR

- 1. R click on the patient's appointment and select ACIR The Claim form then appears
- 2. Click the ADD button on claim form The Vaccine form then appears
- 3. Scroll down and Double click on the row for the selected vaccine
- 4. Select the Site
- 5. Enter the batch number
- 6. Enter the dose number
- 7. Click Ok
 This will close the Vaccine form
- 8. Click Send now on the Claim form

View screenshots below





ACIR1

R click on the patient's appointment and select ACIR

To follow instruc	ctions in how t	o transmit cla	aims to go to	ACIR workflow

Click to enlarge

Bulk Bill

- R click the patient's name on the appointment screen and select Bulk Bill from the drop down menu
 The Bulk Bill form will appear with the cursor sitting in the Add Item field
- 2. Insert the item number and hit Enter The Add Service form will appear
- 3. Hit Enter again or check the relevant boxes for Not Normal After Care etc....
 The item number is added to the Bulk Bill form
- 4. Hit Enter again
 - unless you want to enter another item number
- 5. The Claim is then Batched by default if you hit Enter when the Add Item field is BLANK Batched Claims can be viewed and edited later in All Stored Claims form.
- 6. Clicking Send Now will immediately send the Claim to MedicareAustralia

Click to enlarge		
Click to enlarge		

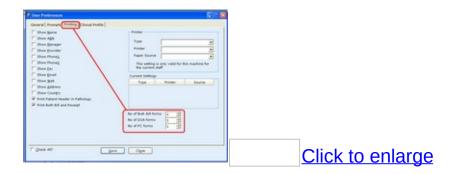
View assignment report

Printing Assignment reports

Turn Printing on or off

Administration > Settings > User Preferences

Select Printing tab



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Search ACIR claim

On the main menu go to Financial > ACIR search

- R click the patient's name on the appointment screen and select DVA Bill from the drop down menu
 The DVA Bill form will appear with the cursor sitting in the Add Item field
- 2. Insert the item number and hit Enter The Add Service form will appear
- 3. Hit Enter again or check the relevant boxes for Not Normal After Care etc....

 Treatment Location Click the drop down box if the service is other than normal consultation rooms

 The item number is added to the Bulk Bill form
- 4. Hit Enter again
 - unless you want to enter another item number
- 5. The Claim is then Batched by default if you hit Enter when the Add Item field is BLANK Batched Claims can be viewed and edited later in All Stored Claims form.
- Clicking Send Now will immediately send the Claim to MedicareAustralia

Click to enlarge

View DVA assignment report	
Click on assignment report	
Click to enlarge	
Click to enlarge	

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Reserved.

Delete DVA claim

An Interactive Claim cannot deleted once it has been transmitted.

A stored claim <u>can be</u> deleted.

Patient Claim

Patient Claim Interactive workflow

Patient Claim Interactive workflow
Click the Payment Details button. The Payment Details Form comes into view.
Select Mode of payment.
• Cheque
• EFT
If EFT then insert the Bank Account Details.
Bank Accounts Details are stored in encrypted format in the database for future use.

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Reserved.

Private Bill

R click the appointment to select Private Bill or Quick Bill.

1. Private Bill.

This list displays the 10 most frequent services used by each individual doctor and continues to update itself.

Note: The menu shows the nicknames of the top 10 services. The nickname can be changed by going to Items > Service > Search Service (Open the record and enter the nickname)

2. Quick Bill.

The Quick Bill autocompletes the bill with service item number 23.

The invoice number for the bill is generated after the bill has been created.

Troubleshooting

The service item number can be changed after it has been added to the grid.

If that item number you have newly edited is not present in the table then the system will message you that the item does not exist and the record colour will become red.

You cannot save the bill if the service item is erroneous. You can either delete that service item from the grid, or alter the service code to a code which is present in the system.

See Also

Bill: Modifying a Bill | Deleting a Bill | Searching a Bill

Simultaneous payment of a bill

Payment while Billing

A bill can be immediately paid once it has been created by clicking on pay.

To understand how to make a payment please take a look at payments.

Click to enlarge

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Add more item numbers to the bill

Add new item numbers

The grid displayed in the bill form is one where you can add bill item numbers.

For more information on grids see working with grids section.

To add item numbers to the bill, click on the first row and first column on the grid under the name service code.

Once you enter an item number the system will automatically insert the default costs (and the GST if this is appropriate).

You can change the price by

- · clicking on the price column and inserting your own fee
- selecting a price from the drop down list

If you do not remember or know the item number the system has been designed to assist you to search for the correct number.

To include GST in an item, tick the GST checkbox.

You can manually set the total value of the bill to a lesser amount than the price of the bill. This effectively discounts the bill and this will be noted on the receipt.

You can't change the description associated with the item number. This can only be done by going back to service search and then updating the service details.

To delete an item number which was accidentally inserted, click on the row header of the item and hit delete.

When all the item numbers have been added to the bill you then have the option to

save the bill

- save and print the bill
- receive payment for the bill

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Ctrl + L

Adding item numbers with Ctrl + L

Hitting Ctrl + L will display the Service Lookup form and by using the Nick Name the software will assist you to find the correct item number.

Each Item number displays the item number by default in the Nick Name box but this can be replaced with an easily remembered name. eg ECG, BCC, Spiro etc

e.g. If you can't remember the item number for removal of a corneal foreign body then the system can be customized to easily search for the correct item number and also add it to the bill.

Enter the letters "fb" for the Nick Name.
Click to enlarge
Just select the correct item number from the matches offered by the Nick Name.
Click to enlarge
The bill form is disabled while the Service Lookup form remains open

and is re-enabled once the Lookup form is closed.

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Ctrl + N

Create a new Service code while in the bill form.

This is not often used but a practice might wish to add a new service code to a bill which does not already exist in the service code table.

Hitting Ctrl + N will display the Service form and the new service can be added to the Service code table and at the same time added to the bill.

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Bill individual, family or agency

in marviada, family of agency
Bill to:-
1. <u>Individual</u>
2. Family
3. Agency
The bill can come from either the doctor or the practice.
When billing to an agency select the Agency Code from the drop down list. Select the Fee Type from the drop down list. Insert a Claim number if this is applicable.

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Change Bill date or Bill doctor

Change the **bill date** or the **bill doctor** by clicking the '?' sign.

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Searching a Bill

On the main menu click on billing then search bill.			
A search form will be displayed to you. You can make the use of wildcard characters when searching.			
Click to enlarge			

Search Options

▶ Show All

Patient Name

Invoice No.

Agency

Doctor Code

Date From

Date To

Total From

Condition

Total To

Outstanding Bills

Results

Click on search button when you have input any search criteria. If any record matches your search condition, the bills will be displayed in the grid below. To view any bill double click on the record or hit enter in the grid after selecting the bill. A context menu is also available for the displayed records.

View Bill

View Patient Details

Make Payment

See Also

Bill: Private Bill | Modifying a Bill | Deleting a Bill

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Message & Comment attached to a Bill

Attach a MESSAGE to the bill.					
This MESSAGE is printed in red and seen by anyone opening the bill (but it is not printed on the bill).					
Attach a COMMENT to the bill.					
This COMMENT is printed onto the bill.					
Click to enlarge					

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Reserved.

Modifying a Bill

You can only update or modify a bill if you are an administrator of the system or you were the person that created the bill. If you are not an administrator of the system then the bills created by other users will not be available to you for modification.

Go to <u>billing and payments</u> > <u>update bill</u> on the main menu. This will display an update bill form where you will have to search the bill you want to update. After you have searched the bill, double click on the record or hit enter on the grid. The bill will be displayed on a separate form. Click the update button on top of the grid. The bill items will be displayed in a separate form where you can update the service items or add a new service item. Click on update and a new form will appear where the previous item number can be replaced or an additional item number can be added. You can also cancel or write off a bill. For more details see deleting a bill. See Also Bill: Private Bill | Deleting a Bill | Searching a Bill

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Reserved.

Deleting a Bill

A bill can't ever really be deleted from the system. It can only be cancelled or written off.

Cancelling a Bill
On the main menu, search for the bill by going to Billing and Payments >Update Bill.
The patient's name appears in the grid.
You have two options- Double click or R click the bill.
1/ Double click the patient's bill.
The bill will be displayed on a separate form.
Click the update button on top of the grid. The bill items will be displayed in a separate form where you can update the service items. You can either change the item number or cancel the item number.
To cancel the bill, change the item number to '000'.

2/ R click the patient's bill.

A submenu will appear. View Bill View Patient Details **Make Payment** Edit Bill Cancel Bill Write-Off Bill

Bill Write Off

To write off a bill, select "Write-Off Bill" from the context menu. Whe	n
you write off a bill, a payment will have to be generated which the	
practice will have to bear. The bill will be marked as written off.	

Ī	Click to	 enlarge

See Also

Bill: Private Bill | Modifying a Bill | Searching a Bill

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Making a Payment

A payment can be made only for an existing bill. Payment form can be opened from the bill form if you click on the pay button. To directly make a payment while creating a bill you can click on the pay button on the bill form instead of saving it. The pay button when clicked will automatically save your bill first and then proceed on to payment.

Otherwise, payments can be made after searching the patient, searching a family or searching an agency.

Making a Payment by Searching a Patient

To make a payment by searching a patient select billing and payments from the main menu and then select 'Individual Payment'. The <u>patient search</u> form will be displayed. Search for the patients you want to make payment for. If your search has matched any records, then the patients will be displayed below in the grid. Double click on the grid or hit enter on any patient record to display the payment form with the *outstanding bills for the patient*. If there are no outstanding bills for the patient, the software will message you.

Making a Payment by Searching a Family

To make a payment by searching a family select billing and payments from the main menu and then select 'Family Payment'. The family search form will be displayed. Search for the family you want to make payment for. If your search has matched any records, then the families will be displayed below in the grid. Double click on the grid or hit enter on any family record to display the payment form with the *outstanding bills for all patients in the family*. If there are no outstanding bills for the patients in the family, the software will message you.

Making a Payment by Searching an Agency

To make a payment by searching an agency select billing and payments from the main menu and then select 'Agency Payment'. The agency search form will be displayed. Search for the agency you want to make payment for. If your search has matched any records, then the agencies will be displayed below in the grid. Double click on the grid or hit enter on any agency record to display the payment form with the *outstanding bills for that agency*. If there are no outstanding bills for the selected agency, the software will message you.

Making a Payment Directly while Billing

When you are billing a patient, you can directly go to the payment form by clicking the pay button on the bill form. Clicking the pay button will first save the bill, if the bill has no errors, then display the payment form for the bill.

Payment Form

Payment of a bill can be made in 3 different ways:

- 1. Lump Sum
- 2. By Bill
- 3. By Item

Payment By Lump Sum



Select this method if you want a lump sum payment to be made against the bill. If there are more than 1 service items in the bill, the lump sum amount will automatically be adjusted against the items. You cannot put in an amount which is greater than the bill amount. The payment amount will have to less than or equal to the bill amount. It might happen that one of the service items have been fully paid while the other is partially paid. This bill will then be available for payment later. If a bill has been fully paid, that is, all the service items have been paid totally, then no more payment can be made against the bill.

Payment By Bill

If you opt for the payment by bill method, then you have to insert the payment against each bill in the grid. The bill is the parent row in the grid, while the service items are the child rows. When you type in an amount for the bill and hit enter, the amount in the service items will be automatically adjusted.

Payment By Item

If you opt for the payment by item method, then you have to insert the payment against each service items in a bill in the grid. Type in the payment amount for the service item and hit enter.

Whenever any amount is adjusted in the grid, the payment summary will also be adjusted. The payment summary gives you a summarized version of the payment taking place.

Setting the Payment Allocation

The payment is not ready to be saved unless and until proper payment allocation is completed. There are a number of options available to you for payment allocations the most simple being the cash. Other allocations currently include eftpos, credit card, 3 different cheques, online banking and others.

A	The sum	of the	allocations	will	have to	match	the s	sum (of to	otal
	payment.	•								

When you select cheque to allocate a payment, you have to enter the cheque number in the details column of the allocation grid.

Simple allocation for single bill

The allocation of payment is quite simple when you are making a payment against a single bill.

Select the type of allocation you want from the drop down in the first column of the allocation grid and type in the required amount. The sum of your allocations is displayed below which should match the total of the payment before you save the payment.

Complex allocation for multiple bills

It may often happen that you are required to make the payment for multiple bills at a single time. For example, when you are making a payment by agency search, then all the outstanding bills for the agency are displayed in the payment form. In such a situation, the payment allocation takes place in a separate form.

The payment allocation grid is absent in the payment form. After you enter the amount for payment and click on save, the payment breakup form is displayed.

Here you have two options:

- 1. Set a single allocation method for all the bills. For example, you can select cash from the drop down which means that both the bills in the above diagram have been paid by cash.
- 2. If the bills are paid differently, you have no option but to manually insert the payment allocations in each of the bills.

After you have finished allocating the payment, click on save.

ee Also -

Payment: Modifying a Payment | Deleting a Payment | Payment Search

Patient: Patient Search | Family Search

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Modifying a Payment

You can update a payment if you are an administrator of the system or you are given the privilege to do so by an administrator. Before you can update a payment, you have to search for if first. To search for the payment, open <u>payment search</u>.

• •	of the payment search grid.
grid. Enter the in payment al automatically	new column called "Corrected \$" will be present in the corrected amount for the service item, match the same location grid and click save. The balance will be calculated and saved.
See Also ——	
Payment: Ma	aking a Payment <u>Deleting a Payment</u> <u>Payment Search</u>
© The Practic	

Deleting a Payment

Reserved.

You can delete a payment if you are an administrator of the system or you are given the privilege to do so by an administrator. Before you can delete a payment, you have to search for if first. To search for the payment, open payment search.

The payment form will be displayed when you select update from the context menu of the payment search grid.
Hit the delete button to delete the payment. The software will prompt for confirmation before deleting the payment. Once the payment is deleted, the bill for which the payment was originally for, will become unpaid.
See Also
Payment: Making a Payment Modifying a Payment Payment Search
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Payment Search

On the main men payment.	u click on billing and payments and then searcl
	be displayed to you. You can make the use of rs when searching.
	Click to enlarge

Search Options

▶ Show All

▼ <u>Hide All</u>

Patient Name

Receipt No.

Received By

Bill To

Date From

Date To

Total From

Condition

Total To

Results

Click on search button when you have input any search criteria. If any
record matches your search condition, the payments will be displayed
in the grid below. To view any payment double click on the record or
hit enter in the grid after selecting the payment. A context menu is
also available for the displayed records.

View

Update

B

The update context menu might not be visible to you if your login does not have the appropriate privilege

ee Also -

Payment: Making a Payment | Modifying a Payment | Deleting a Payment

Banking setup

Ŷ

Remember one Bank Code can be shared by multiple staff members but a staff member can have only have one Bank Code.

A Banking process discreetly logs all payments as they are received by the practice from all the different sources.

When a payment is received for a bill, the drawer of the bill i.e. the Doctor's bank code is used, to either initiate or append to a banking process.

Banking Records can be reconciled partly or fully as the policy of the Practice may require.

Every Bank Code will start an individual banking process for itself however multiple Banking processes can be closed together.

Once a Banking Process is closed, payments included in the report can no longer be edited **but** in case an error is identified after a banking process has been closed then only the administrator has the ability to re-open and make a correction by 'reversing the banking'.

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Setup Bank Codes

All staff members that provide billings for the practice require a provider number. (Registered Nurses can be assigned the common provider number i.e. 1111).

These staff members providing billings for the practice can then be assigned a bank code. Setup the bank codes by entering a specific code for a nominated account. This bank code has no relationship to a staff code though for convenience a practice might want to match the codes. After entering a bank code then enter the Bank Account details i.e. BSB, Account No, Account name, Bank name.

Once the banking codes have been setup then each staff member generating receipts can then be associated to a bank code through their staff details. Go to *Staff> Search Staff* on the main menu.

Click on the Question mark in the box next to banking code and this will bring the Bank Code form into focus so that one of the bank accounts can be selected.

One doctor can have only one bank account BUT one bank account can have many doctors.

Click to enlarge

An employee or locum doctor will often not have their own bank code because their receipts are deposited with the Practice or Principle doctor.

The g	rid at the	top of t	ne page	shows a	n example	of five	staff	placing
depos	sits into o	nly one	accoun	t. (Dr Ada	m Brown)			

The codes listed on the right indicate which staff are associated with the bank account highlighted.

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MedicareAustralia

Go to www.medicareaustralia.com.au

Manage Medicare Australia Connection

MedicareAustralia Settings



Setup

1. Cryptostore Path

This is the path to the PSI certificate. Click find to browse to the certificate. By default it will be pointing to the test file PSI certificate.

2. Passphrase

This is the password to the PSI certificate. This password should be stored in a secure location by the practice. If it is lost then a new passphrase will need to be obtained from MedicareAustralia.

3. Location ID

This value will be provided to you by the software vendor. (eg. HES*****)

- 4. Set Live Values
 Click on set live values
- 5. JRE (Java Runtime Environment)
 Insert this path C:\Program
 Files\Java\jre1.5.0\bin\client\jvm.dll

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Stored Claims

Click on Financial > All Stored Claims

The Stored Claims Form contains to adjacent windows

- Pending Vouchers
- Batched Vouchers

Clicking on the arrows < and > >> can move the claims back and forth between these two windows

Only claims in Pending vouchers can be edited

Double click any claim in Pending vouchers if the claim requires adding or deleting of item numbers.

- Pending Vouchers- Editable
- Batched Vouchers- Not Editable



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Submit Stored Claims

Pending Vouchers

Batched Vouchers window you have the option to

- 1. send all the claims
- 2. send a selected claim
- 3. Unbatch the claim by returning it to the Pending Vouchers window where it can be edited



Fetc	hing	Rep	orts

Click to enlarge

Understanding rejections

There are two kinds of rejections.

1/ Failure at the point of submission.

There are 255 reasons at present why a claim might be rejected. Some examples might be a Token Key Failure, the location certificate has expired or perhaps even corruption of data during transmission.

In this case there is no report at all because the claim did not reach Medicare Australia or was not recognized by Medicare Australia.

2/ Failure inside the processing report.

If the claim is accepted for processing then there are three outcomes.

- Accepted totally
- Rejected totally
- Rejected partially

The processing report from Medicare should explain the reason for rejection.

e.g. expired Provider #, patient not recognized, incompatibility of service codes etc.

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CompletePractice Must Do for the New Users

Straight after installation of GPCompletethe following things needs to be done:

1. Manage Cryptostore file.

a/ Existing users to Medicare Australia.

If migrating from an existing Product which was transmitting to Medicare Australia then you will already have this file. This file needs to be located.

This file can be seached your computer with *.psi

b/ New users to Medicare Australia.

Refer to help menu in CompletePractice.

Navigate to Medicare Australia>Quick Reference Guide.

2. Manage Medicare Australia Connection.

3. <u>Loading Health Funds</u>
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for Specialists

Additional fields are required for specialist referrals.

See the Explanatory fields below.

Explanatory fields

Reports

On the main menu

Click on Reports

Report Wizard

The Report Wizard

The Administrator can use the **Report Wizard** to generate virtually any customizable report.

The features of these reports are that they

- allows definition of content and presentation
- permits sharing of the reports with other users
- enables periodic **Emailing** of the reports to nominated users.

The steps in creating a report from the Report Wizard.

- a. Go to Administration>Reports>Report Wizard
- b. Click on the Add button at the bottom left



Type a description for your report in the Report Name Box

For the auto-emailing client select a frequency for the reports

Insert the email ID in the next box and separate recipients with a semicolon.

c. You can make a Financial Report, a Practice Summary, or a combination of both.

The steps involved in the creation of a financial report.

Define a Report by checking on the options in the tree

- a. On the tree define what constitutes a bill
 i.e. do you want to see only new bills,
 (New Bills), account for Medicare
 rejections and re-submissions, adjust for
 management fees etc.
- b. On the tree define what constitutes a payment in your report. Ideally you will want to see all payments for a given date range. However in certain instances you may want to see payments only for the given bills.
- c. Under Reporting Sections select the sections you want to see in your report. Clicking on any section will bring up a brief explanation on the right hand side
- d. Give the report a name. Report names have to be unique
- e. Set up an email schedule. You may want to see the Bill Summary every week, or the complete financial summary at the

end of every month. Set this up and you will receive the reports in your inbox on the designated days. Note: for this to work the Administrator has to set up Auto-Reporting Schedule along with emailing details in Administration - >Settings ->Preferences -> System Preferences

- f. If you want to share it with non-admin users of the system, check on Share All. Note: Users with admin rights will be able to see/edit your report even if you have decided to not share with anyone
- g. Click on Save.
 Your reports will then be seen listed in
 My Reports under the Report Wizard
 Icon.

You can then activate this report by clicking on the report icon that you have saved.

Repeat these same steps for creating a Practice Summary Report (options available in the other tab on the tree).

A combination of both types of reports can be included in a single file.

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Wizard for financial analysis

Report Wizard for a Financial analysis

Click to enlarge enlarge	Click to enlarge
Click to enlarge	
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Wizard for Practice Summary

Report Wizard for a Practice Summary

	Click to enlarge	Click
to enla		
© The Reserv	Practice Management Software Co red.	ompany Pty Ltd. All Rights

Export advanced query report

- Export data from advanced searching into Excel, Lotus and other spreadsheets. Data can be exported in the universal CSV format. Currently only the first level in the hierarchy can be exported.

Obstetric Patients

A list of actively pregnant patients in the practice can be generated by this report. Click on obstetric patients.

Click Reports>Obstetric Search

Double click on any patient in the grid to display the patient's clinical profile.

Click to enlarge
The patient's clinical profile will be displayed if you double click on the name in the list.

Patient By Drug

The system can search for all patients that have a specified drug listed in their Current Rx.
Click on reports from the main menu and then select patient by drug.
A search screen for drugs will be displays. Type in the first few letters of some drug and click on search button. The list of drugs available will be displayed in the grid.
Double click on any record on the grid or hit enter to view the list of patients who have been prescribed the drug either currently or in the past.

Recall Report

Go to the **Recall Manager** to process the recalls

The Recall report will list the patients by either the

Creation date of the recall

or

Due date of the recall

Filters can be selected to display

- Show only incomplete recalls
- Show only urgent recalls

Agency Statement

Display an agency statement

Bills Held

Bills held are those **PRIVATE** bills which are

- not yet printed
- not paid
- not cancelled
- not written off

For instance a person having a ? BCC excised on their face might be billed as a #31265 but this bill cannot be released to the patient until the histopathology report confirms the diagnosis. This bill might remain in the system for several days and could be forgotten!

Searching "held bills" provides a way of going back though the system and finding these kinds of bills.

To view the bills held report please select reports from the main menu and then select bills held.

Γhe	bills	held	form	will l	oe	displ	ayed	to	you

If you are an administrator of the system, you will be able to view the bills held report for all doctors or whichever doctor you select from the drop down.

System permissions set by the Administrator determines to what extent you can view these reports.

You have two options to view the bills held report. You can either set the date range for the report or you can view the report by the last 'x' number of days. If you do not set any dates in the date range, by default, the current date is chosen.

Click on the show button to display the report. A new form will be displayed with the records searched.



This report will not display the bill item numbers, but the item numbers can be seen in the original bill which comes into view when you double click on any record in the grid.

The '+' and '-' signs on the top right hand corner of the form are not used in the bills held report. You can sort the records by clicking on any column header. You can also remove columns which you do not want to print.



To remove a column right click on the column header and select hide column. The column will be removed and will not be printed. Once removed the column cannot be brought back from this screen. You will have to go back to the bills held screen and re-generate the report if you wish to view the column.

Advanced Search

On the main menu go to Reports > Advanced Search

The advanced search form will be displayed.



Steps to create a query in the advanced search

1. Select an item from the drop down list on top which will give you a list of attributes of the selected item along with the sub-items if any.

Click to enlarge

- 2. Now select the attributes you want to display by either double clicking with the mouse or drag and drop them in the top right grid.
- 3. Repeat step 2 for all items you want to include in your search.
- 4. If you select an attribute, but then change your mind and want to delete it, then hit the delete key.
- 5. If you want sub-items, for example all bills for a patient then from the patient's attributes double click *bill for* and you will see the list of attributes of the bill. You can drag the items of the sub-item for them to be displayed in the query result.

Click to enlarge

In this example the query executed will find all patients in the database with a home phone number ending in the string 12345.

- All patients in the database could be listed if a similar query was entered for a particular street name.
- 6. In the top right grid there are 5 columns viz. name, d, c, operator, and condition. The name column displays the

name of the selected attribute. The 'd' column specifies whether the attribute will be displayed in the result, the 'c' column specifies whether you want a filter condition using that attribute. For example, you can select only those patients whose last name <u>starts</u> with "A". To do that, drag the patient (or double click) – *last name* attribute into the grid and check the "c" column and in the operator select "Like" and in the condition type "A%" The "%" character acts as a wildcard.

Operators added to advanced search i.e. LIKE, IN, IS NULL, IS NOT NULL, NOT IN.

This will help the user in developing several interesting queries e.g. list patients who don't have any allergies recorded, all patients with no medicare number.

7. To display the search result click on *execute*.

Using functions in query

You can use functions like sum, max, min etc. with query. For using these functions execute a query and select a cell of numeric type like "Bill Amount" and then select a function from function list and click "Apply Fx" button.

Saving Queries

Users can save a search and use it later again. To save a query first create and execute a query and then click on the save button. The properties window of the query will be displayed where you can enter a name and description for the query. The query name is mandatory for saving a query.

If you want you can also share the query with other logins. Sharing the query with other users will allow them to use the query but they will not be able to make changes to the query. However, other users can make changes and save it again as a different query using "Save As" button.

Loading, Deleting or Changing the sharing of a saved query

To delete a saved query click on "My Qry". The queries available to you will be displayed as above. The queries which have been created by you will appear in a light blue background color. You can only delete queries created by you, you cannot delete queries created by others and shared with you.

If you are the administrator of the system, you will be able to delete all the queries in the system, however you will not be able to change the sharing of queries created by others.

Right click on the query you want to delete and select the delete option from the context menu. Double clicking on any row will load the query. You can also select the load option from the context menu to load the query. If the query was created by you, then the change sharing option will be available to you to update the query properties.

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Print the advanced search report

Printing Orientation defaults to Landscape in order to display results in a larger font size

Results

On the main menu

Select Reports > Results

Results

- Intray
- Download Results

Intray

Click Reports > Results > Download results

The Intray lists results delivered in HL7 and Pitt format delivered from

- 1. pathology labs
- 2. radiology clinics
- 3. hospital discharge summaries

When a result is reviewed by a doctor the system allows two courses of action with that particular result.

1/ If the result is checked "marked seen" then the result is delivered straight to the patients file in the database and it will leave the Intray once the Intray form is closed.

2/ If the result is instead, marked either "Discuss" or "Recall" then the result is also delivered straight to the patients file in the database but the result is also copied to the Follow-up Tray. This allows these particular results to be put to one side so that they can be reviewed later.

A staffcode must be entered to authorize handling of results in the pathology intray. This way the system can determine which doctor authorized the clearance of the result from the Intray.

When the results are being parsed, the patient names are then checked against all the patient names in the database.

If a precise match is found, then the result is coloured in **black**. If a close match is found, then the result is coloured in **blue**. If no match is found then the result is coloured in **red**.

📤 A pathology result which has not matched a patient in the

database cannot be marked as seen.

To view the details of the pathology result, double click the result. Results which have not yet been viewed are displayed in bold on the grid.

The system allows a user to mark a result as seen and then close the Intray without actually viewing the result, but this is not advised.

The system requires a staffkey to be entered to determine which doctor has assessed the results. This allows for later audits if necessary.

A result cannot be "marked seen" unless the patient is in the database. The patient can be added to the system as a new patient at this stage if the patient has not yet visited the practice.

The following results form is displayed once you double click on any result from the Intray. At this stage the Intray form will remain disabled till you close the results form.

If a blood group value is found in the pathology result, then the update button is shown to the user.

You can click the update button to store the blood group value on the clinical profile form of the patient. The system will not allow manual entry of a patient's blood group. A blood group can only be stored from a pathology result from a valid pathology provider.

Rh negative blood groups are stored in a green colour on the clinical profile screen. This is to assist with antenatal care.

The result item where the blood group is found is highlighted in the grid.

You can double click any result to view it in a separate form. The form displays the result details, the request name, doctor details and the patient name.

The grid displays the list of results.

If any of the results are abnormal because they fall outside the reference range then the status is flagged in red on top as shown in the image above.

The abnormal result is also marked in red in the result grid.

Options in Pathology Result:

Scrolling through the results

You can scroll through the pathology results by using the up and down buttons.

Viewing Clinical Profile

The clinical profile of any patient can be opened by clicking the open clinical profile button on the pathology form. From here, once the clinical profile has been opened, then further actions can be taken straight away concerning the pathology result.

For example:

- prescribe a drug
- order another test
- create a recall
- enter encounter notes

Mark the result as seen

My Notes

Change Patient

If you want to change the system patient associated with the download, you can do so by clicking the change patient button.

Discuss

Clicking the discuss button will change the status of the result to discuss. Again, a system patient has to be associated with the result. If no system patient is associated with the result then the patient search screen will be displayed.

If the discuss button is checked then the result is copied to the Followup

tray.

Recall

Clicking the recall button will allow you to save a recall for the patient. Recalls are discussed in detail in the clinical profile section. If no system patient is associated with the result and you click the recall button, then the patient search screen will be displayed.

If the recall button is checked then the result is copied to the Followup tray.

All pathology results which are marked as seen and saved, will be removed from the intray. Those results are then found in the patient's clinical profile in the pathology results section. There is no way to remove a result back to the Intray from the patient's clinical profile. Results marked DICUSS or RECALL are moved to the Follow-up Tray.

ee Also

Pathology: Download Results

Document Intray

Click Administration > Document Intray

The **Document Intray** logically accepts, assigns and distributes all incoming documentation to the practice.

A document can be

• titled, categorized and dated

A document can be

- associated to a patient AND associated to a doctor
- associated to a patient AND NOT associated to a doctor
- NOT associated to a patient AND NOT associated to a doctor

A document can not be

NOT associated to patient AND associated to a doctor

Right Click the Document in the InTray to select an option in the submenu

Viewing a document in the InTray

First Double click on the document row in the InTray and a form shows with the details of the document.
Click on the Open button to display the document.
A check appears in the Read box once the document is viewed and then closed . (see red circle)
The document is then removed from the InTray once the Close buttor is clicked .
A record is then entered into the patient's encounter notes.
It records
 The Doctor that viewed the document
The Date
The Time
Click to enlarge

Recall Manager

How to use the Recall Manager in GPComplete

From the main menu select Administration> Recall Manager and click on Select Patients in the Recall Manager Form window which will then open the Recall Selection Form.

Click to enlarge

The Recall Selection Form will allow to you to select different criteria for your search

- which type of recalls
- which doctors
- which date ranges
- option to include either overdue recalls, already recalled or both
- option to include inactive patients
- option to include deleted recalls

After you have selected the criteria click OK and a list of patients will then displayed.

The displayed list then gives you the option to

- Delete patients from the list
- Delete the recall for a patient in the list
- Send Mail to all patients in the list ("Mail Merge")

See also Recall Report

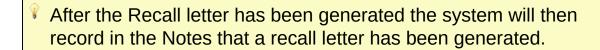
Send Mail for Recalls

Creating Recall letters

Select one of the options from the drop down window.

The letter writer then opens offering the option to select the appropriate template for the recall.

The system allows the letters to be printed directly or saved in one file or saved in separate files for each patient inside one directory.



Task Manager

The Task Manager houses the two different types of tasks

- General Tasks
 - Tasks list
 - Inbox
- Pathology Tasks
 - Tasks list
 - Inbox

The Task Managers have a Task List and an Inbox

The Tasks List displays your list of tasks - you are the owner of these tasks

The Inbox displays the list of Tasks sent to you by some one else (or even yourself)

Admin users see all users Tasks in their Task List

General Tasks

General Task Features

Adding an action
Open the Task Manager, R click then select Add Task
Click to enlarge
Click to enlarge
Give your Task a name
Set a priority- if required
Change the Status - if required but this is usually set by the person accepting the task
You can send the task to a person or a group (eg Receptionists, Nurses, Doctors, Administrators)
The Task will arrive in their Inbox
You can add attachments by selecting files within the system
Enter a note to the person you are sending the Task.

Actions are added by the recipient of the Task

If you add an action to your Task then you have accepted the Task and it will appear in your Inbox.

Therefore don't add actions to your tasks - unless you want to "Accept" the task

Any person adding an action automatically "Accepts"the task.

The Owner of the Task can view who has accepted the task as it is displayed in the row.

If the Task is sent to a Group, then the first member of that group to add an action to the Task then "Accepts" the Task

The system will then automatically remove the Task from the rest of the members in the group.

Click the plus sign on the left to display all actions taken in relation to a Tasks

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Pathology Tasks

Pathology Task Features

Click to enlarge

The subject name of the Task is by default the name of the pathology test

Set a priority- if required

The Status of the task can be set by the person accepting the task

Send the task to one person or to a group (eg Receptionists, Nurses, Doctors, Administrators)

The Task will arrive in their Inbox

Add attachments by selecting files within the system

Add a note for the person receiving the task to view

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Open the Task Manager, it click then select Add Task
Open the Task Manager, R click then select Add Task
the members in the group.

Reserved.

Message

GPComplete provides an internal messaging system.

You can send a message to

•

all users

- an individual
- a selected group of users.
- attach a **Patient File** to the message

A message can be sent from either the **Main Menu** or from the **Appointment screen**.

Sending a message from the **Main Menu** click on Message > Send select message from the main menu and then click send.

Send a message from the **Appointment Screen** by clicking on *total messages* or *new messages*. This opens the messaging screen.

Click to enlarge

Tick the "Send to all" checkbox to send the message to everyone. Hold down the control key and select a group of users on the grid. Click on Attach Patient to attach the patients clinical file with the message.

Check the urgent button to initiate a popup box as soon as the message is delivered.



Only one instance of the send message form can be opened at a given time. When the send form is loaded by the application, the main menu of messages -> send will be disabled. The menu will enable itself when you close the send message form.

ee Also

Appointment: <u>Appointment Screen Features</u>

Message: Retrieve Message

Retrieve Message

	nessages other users have sent to you and also eve your messages select message from the click retrieve.
messages or new mes	your messages when you click on total ssages from the appointment screen inbox. Ir messages from the main menu, by default all d.

Messages are categorized as all messages, new messages, archived and sent. All messages include the messages you have received but not the archived messages. New messages are the messages you have received which are not marked as read and not archived. Archived messages are messages which you have archived irrespective of whether the message is read or unread. Sent messages are the messages you have sent. Sent messages will include the messages which you have sent to yourself.

Click to enlarge

The urgent messages are marked in red. The messages which are received from "SYSTEM" cannot be replied to. These messages are automatically sent to the administrators of the system when an inventory has been used which has fallen below the reorder level.

If someone has replied to a message which you had sent earlier, you can see the original message by clicking "View Original Msg". For more information on how to reply to messages please see "Replying Messages".

Once you delete a message, there is no way to undelete it.

See Also

Appointment: <u>Appointment Screen Features</u>

Message: Message | Replying Messages

Replying Messages

You can reply to messages that have been sent to you by clicking on the reply button in the <u>retrieve message</u> form. The reply form will be displayed.	
Click to enlarge	
You can either reply to the user who sent the original message or reply to all the recipients of the message. You cannot individually select the recipients you wish as you could while sending messages. To reply to all the recipients of the message please tick the checkbox "Reply to all".	
The message system also includes a feature "view original message" which is useful if someone replies to your message with a brief response but you are unsure of the original context of the message that you sent the first place. Clicking on this box will display <u>your</u> original message to that person.	
Click to enlarge	
Message: Message Retrieve Message	

SMS

Send an SMS

The interface lets you send an SMS to any number.

You have the option of using

the predefined SMS-template or any user-defined content

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SMS Template

Creating SMS templates

You can create data-aware intelligent templates for SMS. Making templates is very easy.

You get the familiar letter writer interface to mix in data fields with your content.

The data field will get filled up at the time of sending the SMS.

Once the template is saved, it can be used by all users of the system

From the main menu select Message> SMS > SMS Templates
Click on Add

From the Template form

- Give the new Template a Name
- In the message field create the body of the text you wish to send
- Select from the Data fields information you wish to include in each SMS

This way the same SMS template becomes individualized for every patient so they receive information specific for themselves

SMS Configuration

SMS Settings

This is the control centre for SMS Communication
Most of the information in here is provided by GPC Support and is
required once off only
The only area of interest here is checking of credits
The current balance can be downloaded by clicking on "Chk Cr"

SMS Message Centre

The SMS Message Centre

It is a store for all SMS's sent or about to be sent, by GPC.

There is the Inbox which shows the SMS's that are due to be sent shortly (SMS's go out once every 3 minutes). You can also delete unsent SMS's from here, in case a mistake has been made.

Then there is the Search Tab which lets you search for previously sent SMS.

You can view against every SMS their delivery report, along with how many credits were charged for sending it.

Usually a SMS costs only 1 credit. However if you send off a SMS with much more content, it needs to be split in smaller packets. More credit will be charged then.

As a safety net, at no time can a single message cost more than 3 credits.

Scanning

Set the System Preferences

- resolution
- Colour (B&W, Grayscale, RGB)
- File type (PNG, BMP, TIF, PDF)

Select the scanner from the drop down list

Click on **Start Scan** to begin scanning a document

The scanner component supports scanning of multiple pages for a single patient.

It also supports multiple sets of patient data in one feed to the ADF (Automatic Document Feeder)

This is done by separating the different patient files with a blank page.

The blank page must account for the difference in the quality of paper, scanner resolution etc, so the **tolerance** of the system can be changed.

Higher tolerance makes it easier for the system to recognize the blank page.

Lower tolerance means a paper with minimal information on it will still be considered a data page and not a blank page.

Scanning preferences are set by the administrator and applied to all users. A user may change the scanning options for a given session but the values will revert to what has been set by the

administrator when a new sessions starts. This will
help in ensuring that files are not scanned in at very high
resolutions and thereby reduce clogging up of disk space.

Initate scanning

Scanning can be initiated in three locations

- Document InTray
- Correspondence node in Clinical Profile
- GPC Library

To initiate scanning R click for the sub-menu

Letter Writer

The Letter Writer

- I - I - I	
Click to enlar	MA
CHER LO CHILLI	<u> </u>

To open the Letter Writer

- 1. go to Resources>LETTER WRITER
- 2. Open Clinical Profile Window > Correspondence > LETTER WRITER
- 3. Templates can be immediately accessed thru the drop down box in Correspondence.



The Letter Writer is a word processor.

Use it to

- create new templates
- edit current templates
- import templates

Options

- 1. Open the templates.
- 2. Start the letter writer program.

Pre-existing	temp	lates
--------------	------	-------

Select a template from the drop	down box in Correspondence and
click on	

Start the Letter	Writer	program
------------------	--------	---------

Click on	
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Create a new template

Click on and the program will open Click File>New Click to enlarge Click on Blank Template. Click to enlarge The cursor will be sitting on a new line in the body of a blank form ready for a new template to be designed. Double click a datapoint in the fields to insert it to the blank template. Then once a template is designed

Start the Letter Writer program

click File>Save as Template

lame the template by entering on the title in the Template Name ield. Then click OK.	
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Import a template

Start the Letter Writer program

Click on and the program will open
Click to enlarge
Click File>New
Click to enlarge
Click on Blank Template.
The Letter Writer will open with the cursor sitting on a new line in the body of the form. The imported template will be inserted at the cursor position.
Click File>Import and select the directory and then the file to be imported from the Look in: drop down inside the Open form.
Click to enlarge
e.g Select Mercy Hospital for Women Referral. This will insert the template into the blank form at the cursor point.
Click to enlarge
Select File>Save

Type a name in the Template name box for the imported template and click OK.

This new named template can then be seen in Correspondence by clicking on the drop down box.
Click to enlarge
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Create an Auto Template

You can store a list of predefined shortcuts in the Auto Template manager.

The shortcuts automatically expand to the full description when the enter key or the space bar is hit.

The Auto Templates are specific to each individual user but can be shared with other users.

Auto Templates of one user are not visible to any other user unless they are shared.

From the main menu click on Resources> Auto Templates to display the Auto Template <u>Grid</u>.

	Click to	<u>enlarge</u>
--	----------	----------------

You can add, edit or delete a Template but you can't edit Shortcut values.

You cannot have two shortcuts that are the same.

Delete a template by selecting the row and clicking delete.

Click on Add to add a Template



Create a template, give it a shortcut name then save it. It will then be recorded in the first row of the grid.

Make sure you save your changes before closing the form. For more information on grids please see <u>working with grids</u>.

A document containing datafield entries can be stored as a template

but	only	if	it	is	saved	in	RT	F.	
-----	------	----	----	----	-------	----	----	----	--

The template will automatically display when the shortcut is typed into the notes and the spacebar or enter key is hit.

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introduction to GPC Library

GPC Library

Click on Resources>GPC Library

GPC Library is a resource utility provided for the medical practice to store all varieties of folders and documents in an organized way. These folders and documents are then accessible to all users.

- Patient information sheets
- Consent forms
- Practice policy manuals
- Introductory information for new staff members.

See the following example:-

R click to add a new file, a new folder or an existing folder

Features of the GPC Library are:-

1. Structure

Complete file-folder structure for easy navigation and storage.

2. Icons

- Original shell icons extracted from the OS. It lets you spot the type of file without a single click.
- Opening or closing of the folder is reflected by change in the icon

3. View

Provides 4 options

- List
- Detail
- Small Icon
- Large icon

'Detail' option will list the file owner, created date, modified date along with file type

4. Sharing of Files across users

- Simple option to share or un-share file/folder with other users.
- All subfolders and files can be shared with a singleclick
- Ability to change the sharing at any point of time

5. Basic operations

Renaming of file/folder, common shortcuts, document properties are all supported

6. Block Copying

An entire folder structure with all its content can be copied with a single click from the file system into GPC

7. Security

Permissions are internally evaluated before allowing any operation

Ex:

- Changes to a folder can only be made by the administrator or the owner (user who created it)
- Any changes by a non-administrator to a folder of which he is the owner will be disallowed if the folder contains information added by other users

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GPC Backup

Backing up!!

- gpc.fdb is the GPComplete database file.
- gpc.fdb will reside in the folder C:\gpcdata unless determined otherwise during the installation process.

Click to enlarge

DB

this is the path to the database. e.g. C:\gpcdata\gpc.fdb to set the path, click on **change** and browse to that folder.

This path must be on the local machine. Network paths are not valid.

Prefix

This can be any name to help identify the backup file.

e.g MyPractice.

This will append the name in front of the file. eg. MyPractice12102007.zip

12102007 represents the format ddmmyyyy

<u>Dest</u>

This is the destination folder where the backup will be copied.

Click **change** to browse to this folder.

Select Daily, Weekly or Monthly.

Time

This sets the time of the backup process. Preferably set this time when it is unlikely that the system is being used. e.g. late in the evening or in the early hours of the morning.

Account info

Account name is the Windows username of the machine.

Password is the Windows password for the machine.

FB Service

This should be autopopulated in most instances. If it is not then please <u>contact us</u>.

There might be another instance of firebird installed on this machine.

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Document backup

The GPCbackup only backs up the gpc.fdb file.

Stored documents found in correspondence and the GPC Library are saved on a separate file system on the server machine.

The Installation sets the path to these document files to C:\Program Files\GPComplete\Service\HWS_FILES



Please ensure these files are saved by the third party System Backup device used on the Server machine.

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Contact Us

For further questions or clarification please contact The Practice Management Software Company.

www.pmsc.com.au

Phone: 1300 794471

Administrative Issues: admin@pmsc.com.au

Support@pmsc.com.au

Sales: sales@pmsc.com.au

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HotKeys

The software has the ability to set up hot keys for specific functions. There are two types of Hotkeys in GPComplete.

- 1. Global Hotkeys
- 2. Form Specific Hotkeys

There are four global Hotkeys which are fixed and can't be changed.

- 1. View Appointment F2
- 2. Patient Search F3
- 3. Message Retrieve F4
- 4. Log Off F5

The global Hotkeys are displayed in the panel at the bottom of the screen.

These hot keys will be displayed on the bottom of the screen automatically if there are no forms open in the main window.

If any form is opened, then the specific user hot keys for that form that have been set up by an individual user are then displayed in the panel.

The F8 key is used to toggle between the global hot keys and the

active form hot keys. For this reason the F8 key can't be used for assigning hot keys to any new form. (F1 and F10 are also excluded from use in setting hotkeys.)

Form specific Hotkeys can be varied by every user in the system.

To set up user specific hot keys for a form, you will be required to open the form first.							
Next click on the icon which is found in the bottom left hand corner of the screen to display the list of available hot keys.							
If the form allows hot keys to be set up for it, then the hot key setup form will be displayed on the screen.							
Click to enlarge							

With the help of the mouse, select the action you want to set the hot key for, and then type in any hot key or a combination of keys (Ctrl-Shift-R) you want to set for the action. Two actions in a form cannot have the same hot key assigned. The function keys F1, F8 and F10 cannot be used to specify hot keys. If you want to delete any hot key, select the row for the action whose hot key you want to delete and hit delete from the keyboard. The hot key will revert to 'None'.

After you have assigned your hot keys to the form click on the save button. The hot keys for the form will now be displayed on the bottom panel whenever the form is in focus. To go back and forth between the system hot keys and the form hot keys please use the F8 key.

Hotkeys are not a global setting and therefore will need to be setup for every computer that you are using.



△ You will not be able to use F1, F8 and F10 for setting hot keys.

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Working with Grids

Grids are prevalent right throughout the system.

Whenever you search for information within the system it's likely that a grid will display the data.

1. Grid to display records:

	Click	to	enl	aro	ıe
	<u> </u>				_

Here the grid displays the list of records from the search request.

The functionality of this type of grid is limited to only the display of records.

You are not allowed to enter information into the grid.

2. Grid to enter records:

In a few situations information can be entered into a grid. e.g creating a bill						
Click to enlarge						
e.g adding data to the dictionary						
Click to enlarge						
e.g setting "away dates" for the Staff						
Click to enlarge						

Grids can Sort, Group and Hide the columns of information.

1. Sort

Sort the information in a grid by clicking on the header of the column.

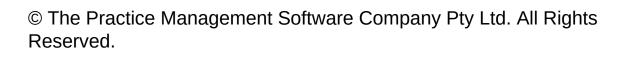
More than one column can be sorted if the Control Key is held while extra columns are selected. This will sort subsequent columns inside the previous column selected.

2. Group

Drag a column title to the header bar to group information.

3. Hide

Hide a column by R clicking the column title.



Wildcards

Wildcard characters can be used when conducting a search.

The Wildcard in GPComplete is the asterisk character * .

In advanced search the Wildcard character is % .

The Wildcard when used in conjunction with other characters will match all patterns.

Example:

If you input '12*' against the patient medicare in a patient search form, the search result will include all patients whose medicare number starts with '12'

Example:

If you input '1*2' against the patient medicare in a patient search form, the search result will include all patients whose medicare number starts with '1' and ends with '2'

Example:

If you input '*12' against the patient medicare in a patient search form, the search result will include all patients whose medicare number ends with '12'

Example:

If you input '*' into the patient search form, the search will include all patients in the system.

This is why it will prompt with the warning:

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Frequently asked questions

Frequently Asked Questions

1. What is Patient Claim?

Medicare benefits are payable to Australian residents and eligible overseas visitors. Foreign diplomats and their families are not covered unless they are from countries, other than New Zealand , which have a reciprocal health care agreement (RHCA) with Australia . Australian residents must be enrolled in Medicare before benefits can be paid. Enrolment application forms are available at Medicare offices in all states and from HIC's web site at www.MedicareAustralia.gov.au

Back to Top

2. What is BulkBill Claim?

If a practitioner agrees to the bulk billing method, patients assign their right to a benefit to the practitioner as full payment for the medical service. The practitioner (or any other person or company) cannot make any additional charge for the service. This means that if the doctor bulk bills, the patient cannot be charged a booking fee, administration fee, a charge for bandages or record keeping or a charge by the doctor's service company. It is a legal requirement that the assignment of benefit form be signed by the patient only after the service has been provided and the form completed. A copy of the completed assignment form must be given to the patient.

Back to Top

3. What is DVA Claim?

The health program provides eligible members of the veteran community with access to health care services through arrangements with registered health care practitioners and public and private hospitals. In general terms, health care is only provided to those resident in Australia.

Eligible veterans and dependants are issued with cards that reflect their level of health care coverage.

Back to Top

4. What is ACIR Claim?

The Australian Childhood Immunisation Register (the Immunisation Register) was established in 1996 in response to a decline in childhood immunisation in Australia and the increase in preventable childhood diseases.

The Australian Childhood Immunisation Register (Immunisation Register) was developed in response to a decline in childhood immunisation in Australia and the alarming increase in preventable childhood diseases. The Immunisation Register records details of vaccinations given to children under the age of seven who live in

Australia, helping Australian parents to ensure that their children grow up healthy and are fully immunised. Health professionals also use the Immunisation Register to monitor immunisation coverage levels, service delivery and disease outbreaks.

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Using the Recall Manager

How to use the Recall Manager in GPComplete

From the main menu select Administration> Recall Manager and click on Select Patients in the Recall Manager Form window which will then open the Recall Selection Form.

	Click	to	enl	arc	ae

The Recall Selection Form will allow to you to select different criteria for your search

- which type of recalls
- which doctors
- which date ranges
- option to include either overdue recalls, already recalled or both
- option to include inactive patients
- option to include deleted recalls

After you have selected the criteria click OK and a list of patients will then displayed.

The displayed list then gives you the option to

- Delete patients from the list
- Delete the recall for a patient in the list
- Send Mail to all patients in the list ("Mail Merge")

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Auto Templates

Overview of Document Intray

Click Administration > Document Intray

The **Document Intray** logically accepts, assigns and distributes all incoming documentation to the practice.

A document can be

• titled, categorized and dated

A document can be

- associated to a patient AND associated to a doctor
- associated to a patient AND NOT associated to a doctor
- NOT associated to a patient AND NOT associated to a doctor

A document can not be

NOT associated to patient AND associated to a doctor

Right Click the Document in the InTray to select an option in the submenu

create a pathology request

create a radiology request

Bulk Billing Overview

- R click the patient's name on the appointment screen and select Bulk Bill from the drop down menu
 The Bulk Bill form will appear with the cursor sitting in the Add Item field
- 2. Insert the item number and hit Enter The Add Service form will appear
- 3. Hit Enter again or check the relevant boxes for Not Normal After Care etc....
 The item number is added to the Bulk Bill form
- 4. Hit Enter again
 - unless you want to enter another item number
- 5. The Claim is then Batched by default if you hit Enter when the Add Item field is BLANK Batched Claims can be viewed and edited later in All Stored Claims form.
- 6. Clicking Send Now will immediately send the Claim to MedicareAustralia

Click to enlarge		
Click to enlarge		

DVA Overview

- R click the patient's name on the appointment screen and select DVA Bill from the drop down menu
 The DVA Bill form will appear with the cursor sitting in the Add Item field
- 2. Insert the item number and hit Enter The Add Service form will appear
- 3. Hit Enter again or check the relevant boxes for Not Normal After Care etc....

 Treatment Location Click the drop down box if the service is other than normal consultation rooms

 The item number is added to the Bulk Bill form
- 4. Hit Enter again
 - unless you want to enter another item number
- 5. The Claim is then Batched by default if you hit Enter when the Add Item field is BLANK Batched Claims can be viewed and edited later in All Stored Claims form.
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Click to enlarge		

Scan options

Set the System Preferences

- resolution
- Colour (B&W, Grayscale, RGB)
- File type (PNG, BMP, TIF, PDF)

Select the scanner from the drop down list

Click on **Start Scan** to begin scanning a document

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Lower tolerance means a paper with minimal information on it will still be considered a data page and not a blank page.

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You can send a message to

•

all users

- an individual
- a selected group of users.
- attach a **Patient File** to the message

A message can be sent from either the **Main Menu** or from the **Appointment screen**.

Sending a message from the **Main Menu** click on Message > Send select message from the main menu and then click send.

Send a message from the **Appointment Screen** by clicking on *total messages* or *new messages*. This opens the messaging screen.

Click to enlarge

Tick the "Send to all" checkbox to send the message to everyone. Hold down the control key and select a group of users on the grid. Click on Attach Patient to attach the patients clinical file with the message.

Check the urgent button to initiate a popup box as soon as the message is delivered.



Only one instance of the send message form can be opened at a given time. When the send form is loaded by the application, the main menu of messages -> send will be disabled. The menu will enable itself when you close the send message form.

ee Also

Appointment: <u>Appointment Screen Features</u>

Message: Retrieve Message

Adding a Staff

How to Add a new Staff member:

Click on the main menu Staff>Add Staff. The Staff Register form will become active.
Complete the required fields on the Staff Register from.
Note the Privileges entry in the bottom right corner of this form. A drop-down list of different templates can be selected. Templates provide a shortcut in assigning permissions to a new staff member. Click to enlarge
You can also open the staff register screen from staff search by selecting the "Add New" button.
▶ Show All
▼ Hide All

Mandatory Fields in Staff Registration

Other Fields in Staff Registration

Provider No.
Prescriber No.
Billing Preference
Post code, Suburb and State
Locum
Duplicate Staff Prompt
ee Also
Staff: Modifying a Staff Deleting a Staff Staff Search
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Search Pathology Request

You can search for the request by typing in the name or code or both and then modify the request details if required.
You can use (*) wildcard characters when searching.
Click to enlarge
The pathology requests present in the system by default will not be available to you for any modification. The default pathology requests will not be displayed on the search results as well.
ee Also
Pathology: Add Pathology test to request table Search or Modify Pathology Request
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Password and Staff Key

See Also

Administration: Adding a Login | Modifying a Login | Deleting a

<u>Login</u>

Staff: Staff

health funds

Other Details

Problem list

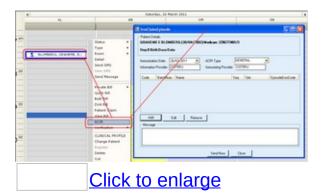
IMC workflow

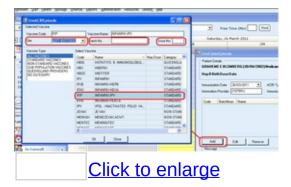
Before completing an IMC claim review <u>Health Funds</u>

The ACIR workflow

- 1. R click on the patient's appointment and select ACIR The Claim form then appears
- 2. Click the ADD button on claim form The Vaccine form then appears
- 3. Scroll down and Double click on the row for the selected vaccine
- 4. Select the Site
- 5. Enter the batch number
- 6. Enter the dose number
- 7. Click Ok
 This will close the Vaccine form
- 8. Click Send now on the Claim form

View screenshots below





Manage Medicare Australia connection

Click Manage Medicare Australia Connection to open the form.

Configuration Details

Configuration Fields	Description
Cryptostore File Path	This is the path of a new PSI Store containing all necessary keys and certificates for use with Medicare Australia Online in the specified location. You can brow for the PSI file pressing the browse button.
Location ID	The identifier allocated to the location. Will Be Provided By Our HELPDESK
Pass Phrase	For Creating the PSI file this file is required.

Proxy Details

Main Fields	Description				
Proxy Name	This is name of the proxy Server.				
Proxy Port	This indicates the port of the Proxy.				
Proxy User	Default UserID to be used for authentication at any proxy wl no specific value has been set.				
Proxy Password	Password to be used for authentication at the proxy.				

Connection Testing:

- Go to the Medicare Australia configuration
- Fill up the fields
- Select the Transmission Type as Test
- Press the Test to test Connection.
- If the connection is successful then press OK.

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Load Health Funds

Click on Load Health funds
Click to enlarge
Click on HIC refresh. The progress bar will appear as they are loaded.
Click to enlarge
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Download Results

See Also -

Pathology: Intray

Adding a Login

See Also -

Administration: Modifying a Login | Deleting a Login | Password and Staff Key

Modifying a Login

See Also -

Administration: Adding a Login | Deleting a Login | Password and Staff Key

Deleting a Login

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Administration: Adding a Login | Modifying a Login