BC Secure User Guide for MedicalDirector Blue Chip

BC Secure is a utility for managing user program access and permissions in MedicalDirector Blue Chip.

This guide in an overview of the features of BC Secure, and is designed to be used in conjunction with the MedicalDirector Blue Chip Online Help.

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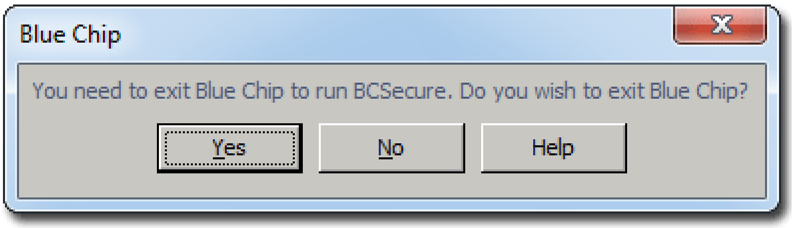
Foreword

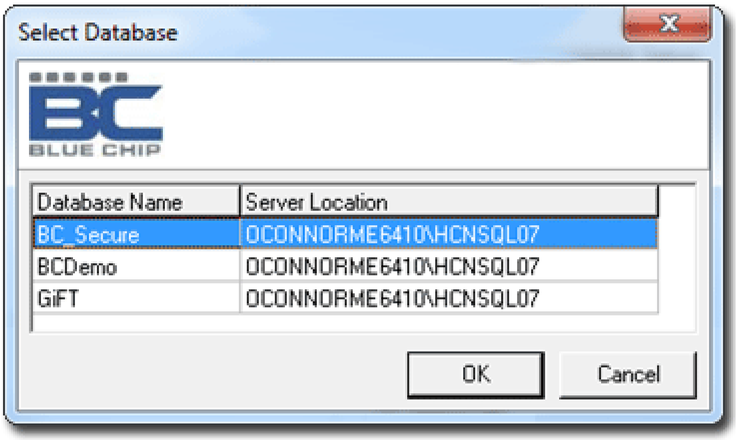
During the initial MedicalDirector Blue Chip customisation for your Practice at MedicalDirector, access to BC Secure is typically granted to the Practitioner(s) and Practice Manager unless specifically requested to include others.

Opening BC Secure

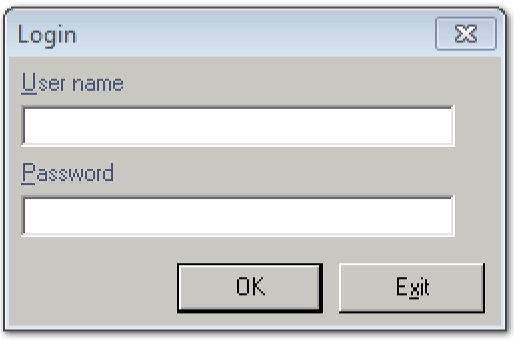
1. BC Secure is accessed from within MedicalDirector Blue Chip itself by selecting **BC Tools > Utilities > BC Secure**.
2. MedicalDirector Blue Chip will close in order to open BC Secure. Click the **Yes** button to continue.



3. If prompted, from the Select Database window, select the MedicalDirector Blue Chip BC Secure database you wish to open. You will only see this window if you have access to multiple MedicalDirector Blue Chip databases.



4. Enter your username and password.



5. Click the **OK** button to enter BC Secure.

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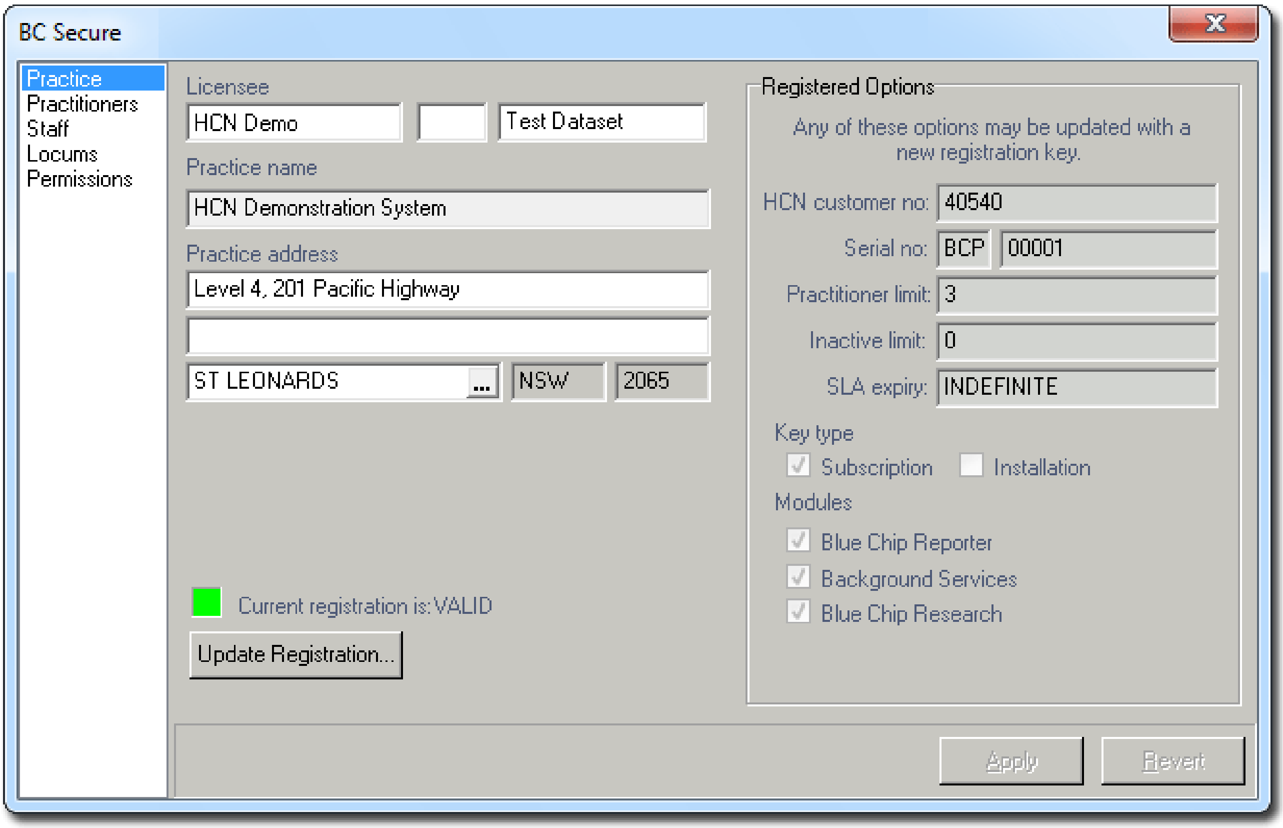
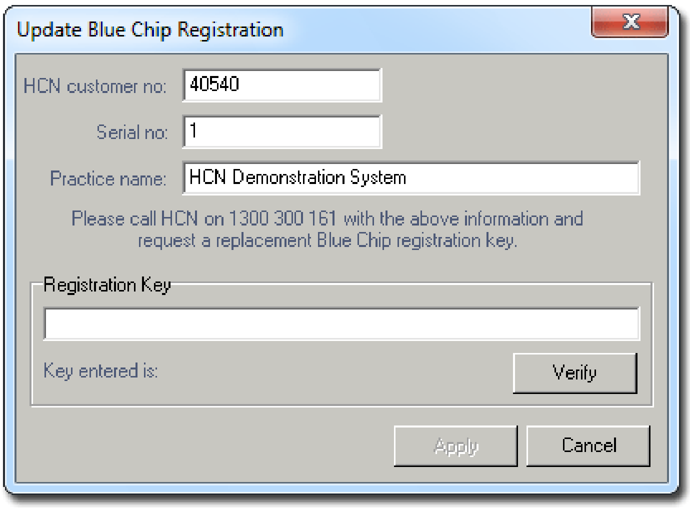
The Practice Screen

This screen represents the licensing and registration details held by MedicalDirector within MedicalDirector Blue Chip. White text fields represent details which can be changed without affecting the MedicalDirector Blue Chip's operation, whereas grey cannot be edited. The Registered Options (on the right-hand side of the window), display the Practice's MedicalDirector Customer Number, database serial number, practitioner limit (the total number of practitioner and tenant users that can be entered into the system).

Should a new practitioner or tenant licence be required, please contact the MedicalDirector Sales on 1300 300 161 or email specialistsales@medicaldirector.com. MedicalDirector will supply you with an updated Licence Key.



1. To update the practice's registration click the **Update Registration** button.



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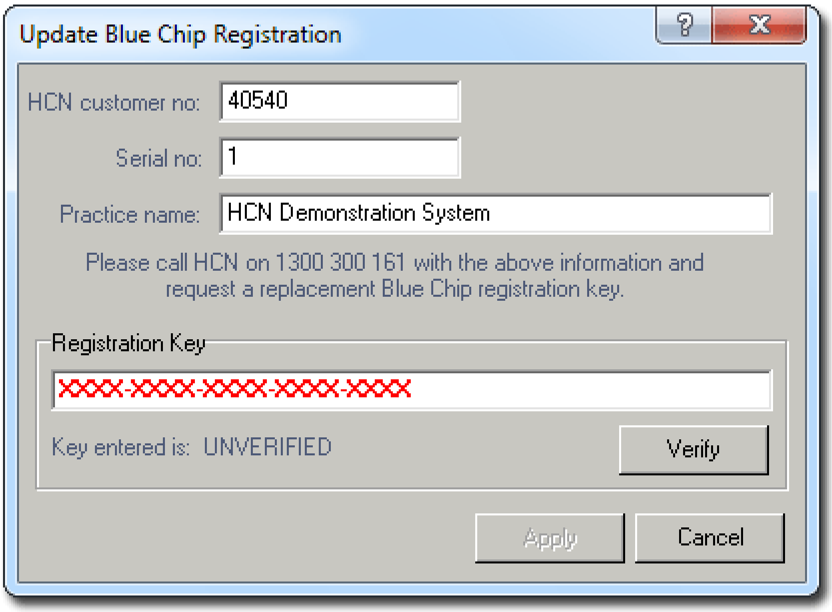
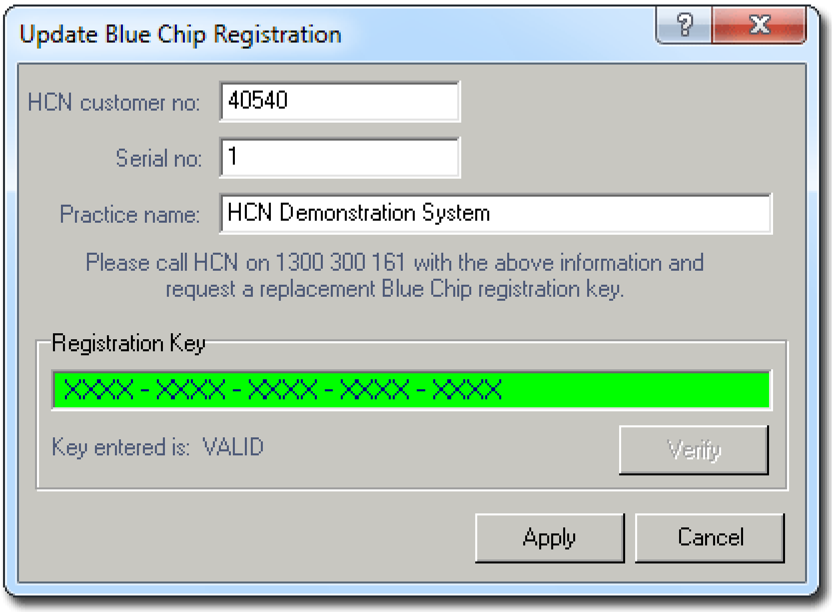
2. Enter the new Registration Key exactly as it was supplied.

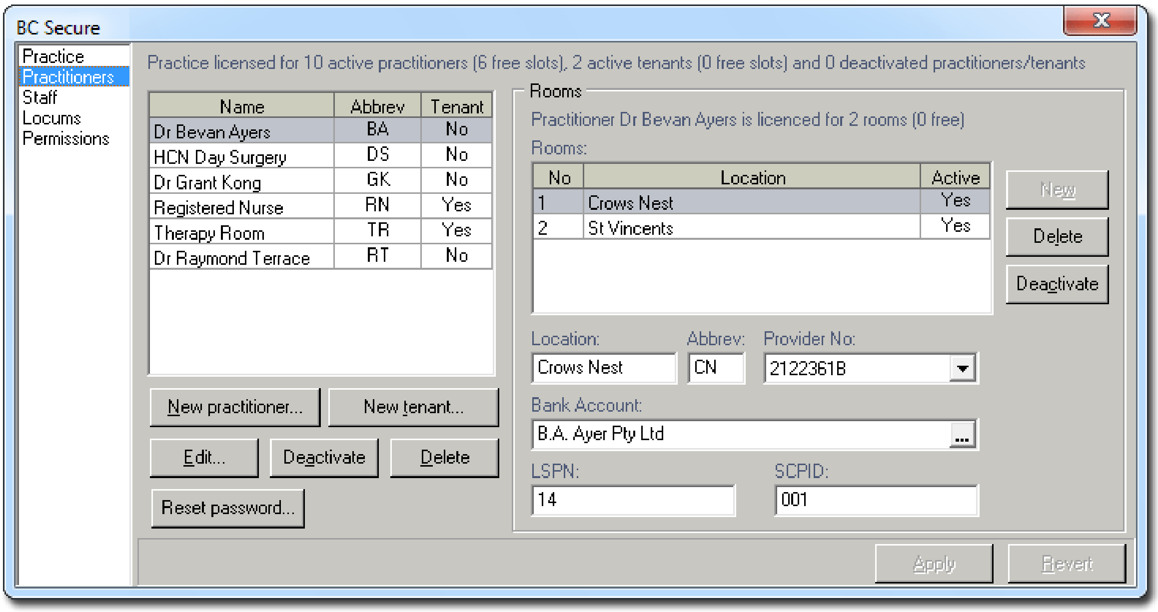


3. Click the **Verify** button. You will be notified it the verification fails.
4. Click the **Apply** button.
5. You will be notified upon a successful registration. Click the **OK** button to continue.



The Practitioners Screen

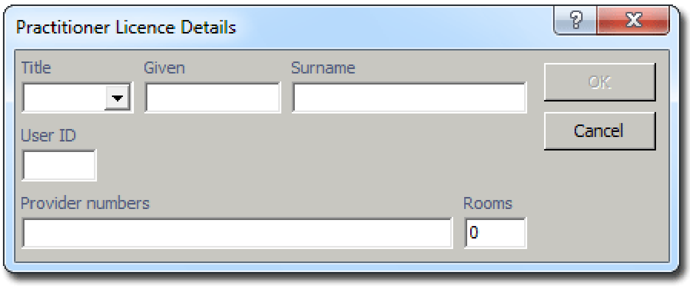
This screen allows the adding of a new practitioner or appointment book (tenant), deactivating a previously active practitioner, setting up a billing location and associated bank account.



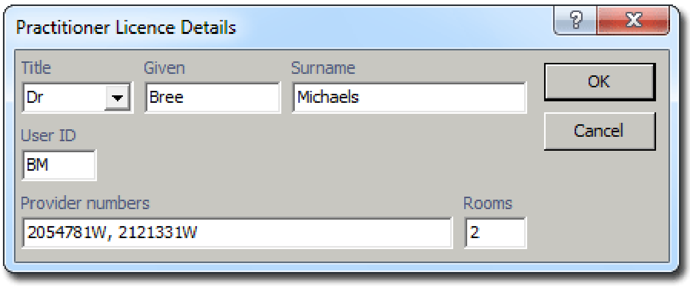
Adding a New Practitioner

The following steps demonstrate how to add a new practitioner to MedicalDirector Blue Chip. Please call MedicalDirector Customer Care on 1300 300 161 (option 2) to create billing letterheads, billing classes, appointment types, and associated price lists for the new practitioner.

1. Click the **New Practitioner** button. The Practitioner Licence Details window appears.



2. Complete their details as necessary. Separate multiple Provider Numbers with a comma. The OK button becomes available once you have entered the necessary and valid details.



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Setting up Locations for a New Practitioner

The terms 'Room' and 'Location' are interchangeable, with both referring to the physical location at which a practitioner resides. There may be instances however where a single location has multiple rooms, and although this is uncommon, MedicalDirector Blue Chip provides for this scenario.

Rooms are defined by;

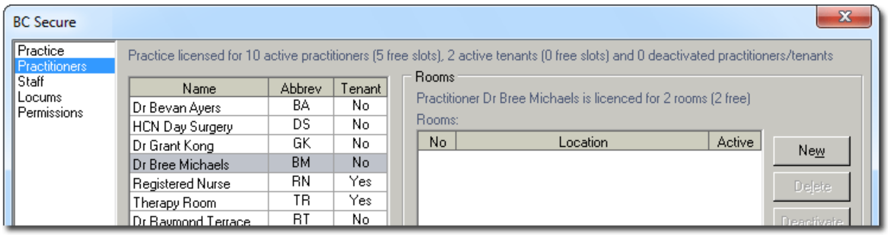
- A room number.
- The location at which the room can be found.
- Whether or not the room is 'active'.

Locations are defined by;

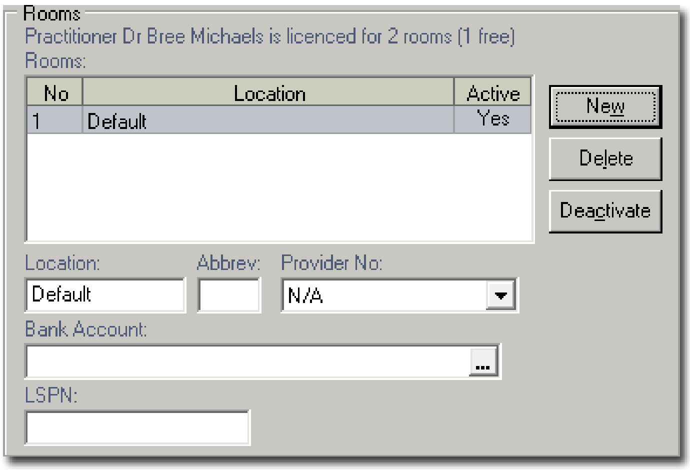
- A name, and its abbreviation.
- A Provider Number (a practitioner must record a Provider Number for each location at which they practise)
- An associated bank account
- A Location Specific Practice Number (LSPN) if required, for all diagnostic imaging and radiation oncology sites.

Each location can have a unique letterhead associated with it, and when an account is created in a patient's file, the practitioner and location are both specified. The linking of earnings figures with locations allows you to run separate financial reports for each location. Note also that Rooms/Locations are available to practitioners, but not locums or tenants.

1. Within BC Secure, select the **Practitioners** menu.



2. Click the **New** button to set up a new location.



3. In the **Location** field, replace 'Default' with the actual location and include a suitable abbreviation.
4. Click the **Provider No.** drop down list to associate the correct provider number with the billing location.

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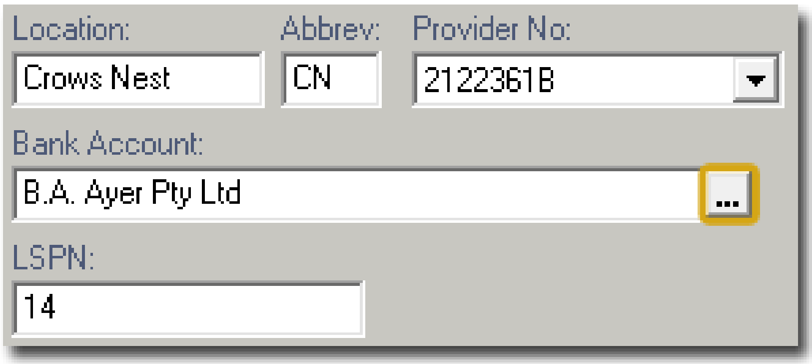
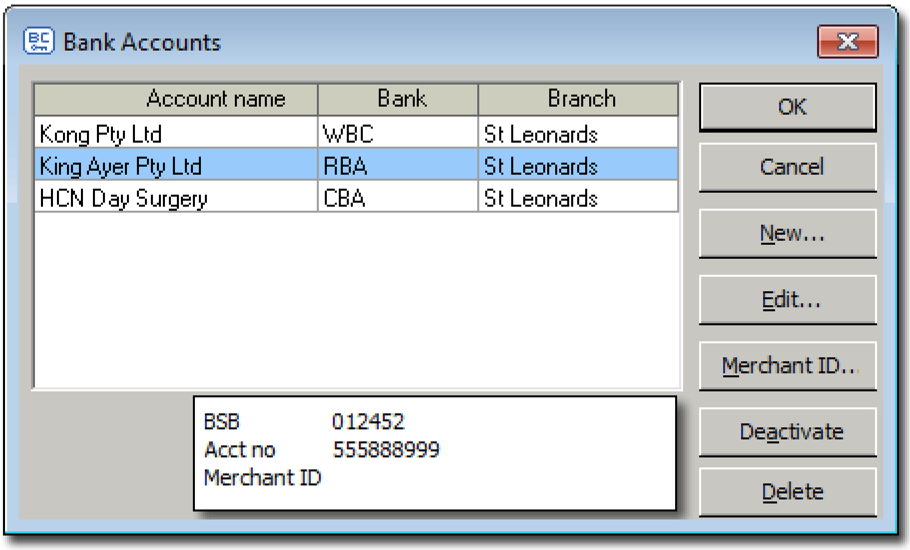
5. Click the ... button at the end of the **Bank Account** field.

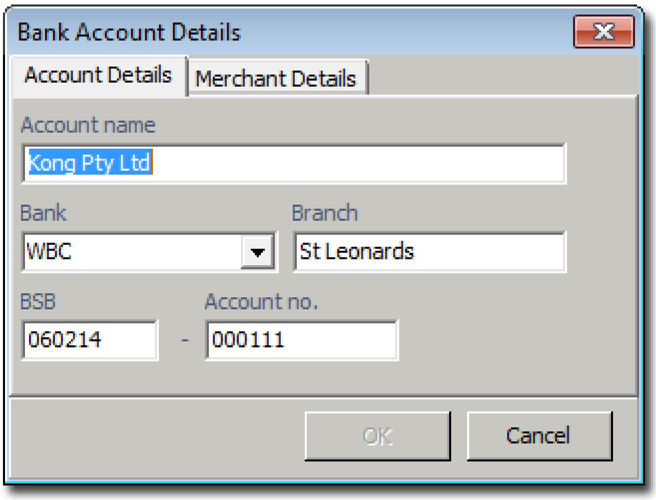


6. The **Bank Accounts** window appears.



Select the existing bank account and click the **OK** button (for when all monies are paid into a single practice account and the practitioners draw a wage).

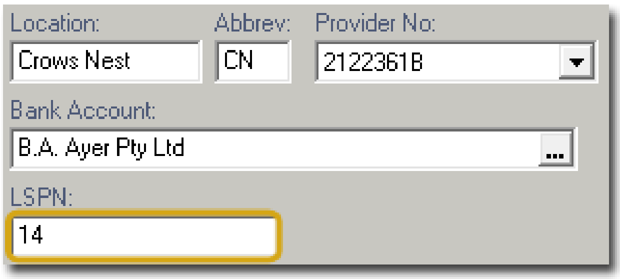
Alternatively, if a new bank account is required for the new practitioner, click the **New** button to enter the new Bank Account details.



*The **Merchant Details** tab is used when the practice is using an integrated payments system.*

7. Click the **OK** button to continue.
8. You will be returned to the main BC Secure window.

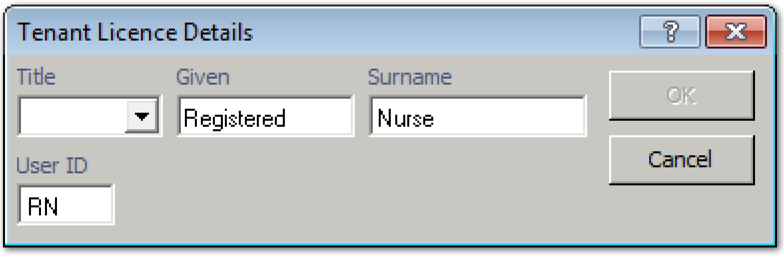
   A Location Specific Practice Number (LSPN) is a number allocated by Medicare to a registered diagnostic imaging and/or radiation oncology premises or base for mobile facilities. Enter if required.



9. Click the **Apply** button to accept the changes.

Adding a New Tenant

1. On the BC Secure window, click the **New Tenant** button. The Tenant Licence Details window appears.



2. Enter in the Tenant details (a Tenant is a non-billing entity like a Registered Nurse).
3. Click the **OK** button.

The Edit Button

Clicking Edit with the tenant selected will only allow the name and logon initials to be changed. Clicking Edit with a practitioner selected will allow the name, logon initials, provider numbers and number of rooms to be added to or changed.

The Deactivate Button

Deactivating a practitioner will prevent any billing to occur on behalf of that practitioner and remove their appointment book from the installation. In the practitioner screen, the deactivated practitioner will appear in italic. Clicking the Reactivate button and then clicking Apply will reinstate the practitioner.

Deactivating a Tenant will remove their appointment book from the MedicalDirector Blue Chip installation.

To reactivate a practitioner or tenant - Please contact MedicalDirector Customer Care on 1300 300 161 - Option 2

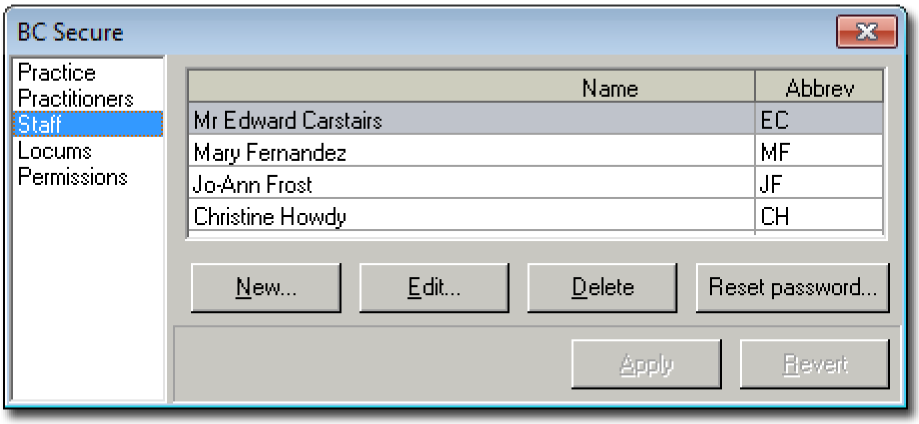
The Reset Password Button

With a practitioner or tenant selected, pressing the Reset Password button forces a password change at the BC Secure screen rather than from within MedicalDirector Blue Chip

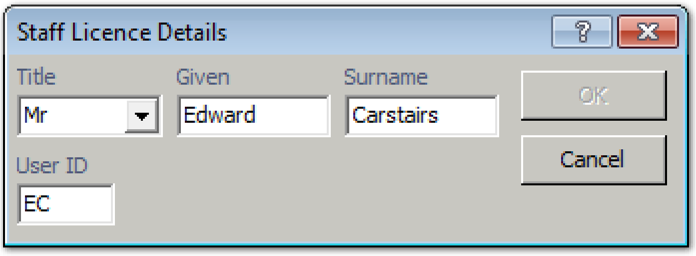
The Staff Screen

Adding New Staff

The Staff screen allows the entry of new staff members, editing their names or logon initials, deleting previous employees and resetting their passwords without logging into the MedicalDirector Blue Chip program.



1. To enter a new staff member, click the **New** button. The Staff Licence Details window appears.



2. Enter in the staff member's particulars. If their initials conflict with those of another user, a warning message will prompt for a different set of initials. The user id field can accept up to 3 characters, so using a middle initial is acceptable compromise.
3. When an acceptable, non-conflicting name is entered, click the **OK** button.
4. Click the **Apply** button to accept and confirm the change(s), Click Revert to cancel the changes.

The Edit Button

Click the Edit button to open the Staff Licence Details window. When modifications have been performed, click the OK button then the Apply button to confirm.

The Delete Button

Click the **Delete** button to delete a Staff member. Note that you will ***not*** be prompted to confirm this action. If the deletion is performed in error, click the **Revert** button to undo the deletion.

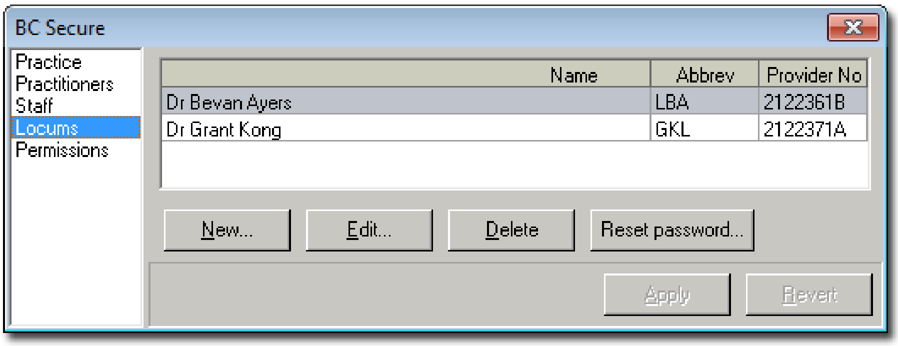
The Reset Password Button

With a staff member selected, pressing the Reset Password button forces a password change.

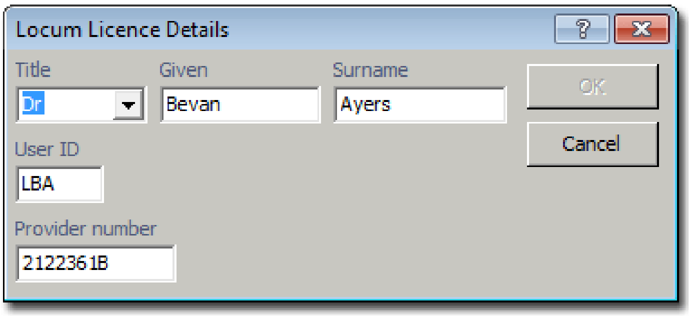
The Locum Screen

Adding a Locum

The Locum window is used to add Locums practising on behalf of a regular practitioner. Before beginning, ensure the Locum's provider number is supplied. Please refer to the MedicalDirector Blue Chip User Guide regarding invoicing for a Locum.



1. Click the **New** button. The Locum Licence Details window appears.



2. Enter the practitioner's details at the Locum Licence Details panel
3. Click the **OK** button.
4. Click the **Apply** button to confirm the entry or **Revert** to cancel.

   Even though the Locum's and Practitioner's details have been recorded in BC Secure, they cannot log into MedicalDirector Blue Chip until they have been granted permission to do to. This is covered in the Permissions section.

The Edit Button

Clicking this button allows the Locum's name, title and or provider number to be changed.

The Delete Button

Clicking this button removes the ability to use the Locum in billing, it also removes any permissions previously assigned. Deletion of the Locum's details is immediate with no confirmation message. There is no need to click apply, and the revert button does not retrieve a deletion in error.

Reset Password Button

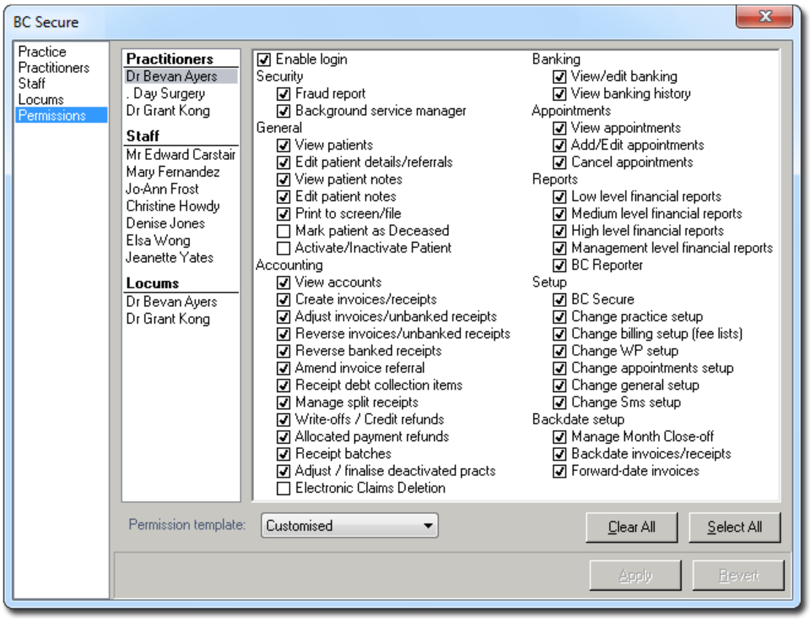
With a locum selected, pressing the Reset Password button forces a password change at the BC Secure screen rather than from within MedicalDirector Blue Chip

The Permissions Screen

Setting Permissions

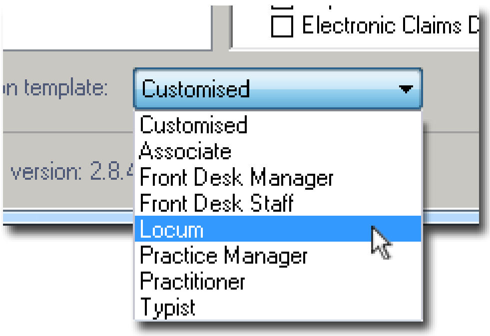
MedicalDirector Blue Chip provides for permission-level access to certain functions and modules. You can view which permissions each user has from within MedicalDirector Blue Chip, via the Permissions Tab of the Practitioner Setup window.

User permissions are managed via BC Secure's Permissions menu. Permissions can be granted to a given user by selecting a pre-defined set of permissions from the Permission Template drop-down list, or by customising a selection of permissions by enabling/disabling permission check boxes. The following example indicates that Dr Bevan Ayres has been granted a 'Customised' set of permissions.



Permission Templates

1. Select the staff member.
2. Click the **Permission Template** drop down menu.



3. Select the role closest to the staff member's role at the Practice.
4. To grant further permissions, click in the check box alongside the description. To rescind a permission, click a previously granted permission (marked with a tick), which will clear it. Any change to the permission template will be regarded as Customised and reflect this in the permission template drop down list
5. Click Apply to confirm the permissions (revert to cancel).

Explanation of Permissions

Enable login	Enables the staff member to login to the system. If this permission is not checked, the user is informed that their login has been disabled.\

General Section	
View patients	Allows the user to view patient records.
Edit patient details/referrals	Enables patient details data to be edited.
View patient notes	The patient notes menu option doesn't appear in the patient explorer.
Edit patient notes	Enables the user to type in the notes field.
Print to screen/file	Provides an option in the printing engine to direct the output to the screen or to be saved to disc as a file.

Accounting Section	
View accounts	Enables the Accounts menu item to appear in the left margin menu of the patient record. With the ability to view accounts, a new account(s) can be created.
Create invoices/receipts	When disabled, a user can still access account details and print labels. MedicalDirector recommends enabling **Low Level Financial Reports** in the Reports section, otherwise the invoice and/or receipt cannot be printed.
Adjust invoices/unbanked receipts	Only allows adjustment of unbanked receipts. The option to reverse is disabled.
Reverse invoices/unbanked receipts	Only allows a reversal of an invoice (the 'adjust' and 'reverse' permissions are independent of each other). Similar panels appear when reversing an unbanked receipt.
Reverse banked receipts	This only pertains to banked receipts. 'Unbanked receipts' are covered by the previous permission.
Amend invoice referral	Allows amendments to an invoice to be made without adjusting it. Typically, referrals can be amended (amend invoice) and the service item description (amend invoice item) can be amended but not the service date. The amend button is controlled by activating the permission here and in the code of a system file, with both needing to be activated for the feature to appear in MedicalDirector Blue Chip.
Manage Split Receipts	A 'split receipt' is where a single payment is made for separate services made by separate practitioners; separate invoices may have been issued, but the patient pays for service using one payment (using the add items button during receipting). This permission also controls Bank Transfers, which occur when payments are transferred between practitioners with separate bank accounts without changing patient accounts. For example, a patient prepays for planning and management of a pregnancy, and another practitioner within the practice (part of the MedicalDirector Blue Chip system) assists with elements of the treatment or takes over treatment for a period of time. A Bank Transfer allows for payment of those elements or period of time to be resolved between the practitioners without adjusting and reissuing invoices and receipts.

Receipt debt collection items	Removes the Debt Collection option from the payment method types when creating a new receipt.
Write-offs/credit refunds	Allocating a Credit or Refund allows funds to be either refunded to the patient or allocated against another outstanding invoice.
Allocated payment refunds	Allows a payment that has been allocated to an invoice to be refunded. Being a refund, it is presumed that banking has been finalised. Changes here are reflected in the Refunds History tab and the Refunds section of the Banking. The invoice reverts outstanding. The refunded amount is presumed to be returned to the patient, as it is not recorded as a credit (pre) payment.
Receipt batches	Batches can be created and sent without this permission. However a user cannot open the batch in order to receipt the batch. This permission does not affect viewing, reprinting the summary, or changing the batch number
Adjust/finalise deactivated practs	When a practitioner is deactivated, no new business can be conducted on their behalf. This permission only allows adjustments of previously-issued invoices and receipts, new receipts for existing invoices, and the finalisation of banking for these practitioners.

Banking Section	
View/edit banking	Controls access to the Banking screen via the Practice Explorer. If this permission is not granted, then the Banking menu item is unavailable.
View banking history	Access past bank deposit slips and EFTPOS settlements in the Banking window. This permission cannot be used without the above permission granted.

Appointments Section	
Cancel appointments	Allows the user to Cancel appointments in the appointment book.

Reports Section	*Selecting a higher-level report permission does not automatically grant users access to lower-level reports.*
Low level financial reports	In addition to the reports that can be printed for this level (see Appendix A: BC2.7 Report Permission Mapping Document), the user can print Invoices, Receipts, and Bookings.
Medium level financial reports	See Appendix A: BC2.7 Report Permission Mapping Document.
High level financial reports	User can print bank deposit slips, EFTPOS statements and past bank account settlements in addition to those items listed in the Report Mapping Document (Appendix A).
Management level financial reports	see Appendix A: BC2.7 Report Permission Mapping Document
BC Reporter	Users have to login to this area of MedicalDirector Blue Chip to run non-standard reports. Granting this permission will allow users to log in.

Setup Section	

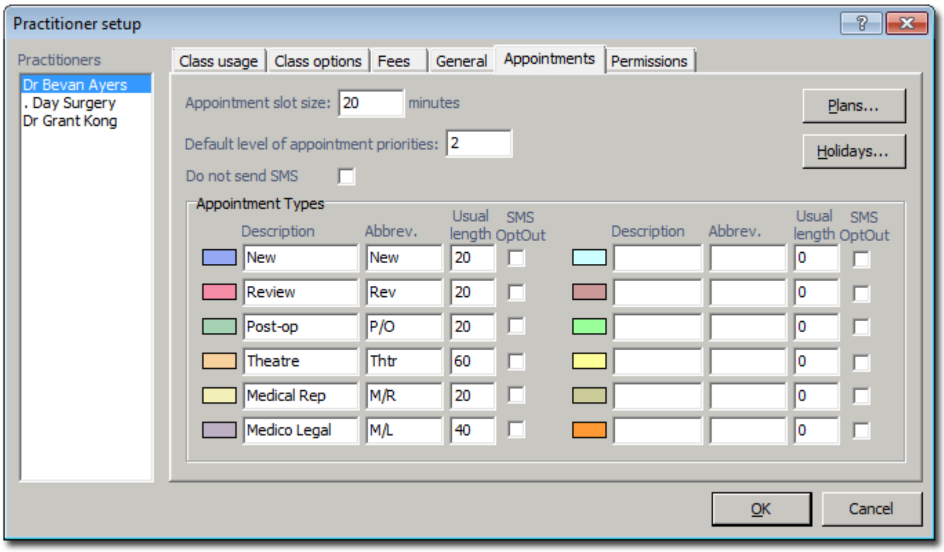
BC Secure	Allows users to access the BC Secure area and modify all of the settings represented in this table.
Change practice setup	With the exception of the Practitioner Details section under the Setup menu within MedicalDirector Blue Chip, all other items are locked.
Change billing setup (fee lists)	Allows users to access the Service Item List to upgrade Health Fund fees, edit the miscellaneous items list, and change the practitioner's fees in the Practitioner Details option, under the setup menu in MedicalDirector Blue Chip.
Change WP setup	Allows users to access the WP and Recall templates screen from the setup menu. Within this screen you can change default titles, create or edit templates, export letters from MedicalDirector Blue Chip, import RTF files into MedicalDirector Blue Chip, copy and delete templates.
Change appointments setup	Allows the user to change the appearance of the Appointment Book. See the Appointments Setup section for more detail.
Change general setup	Allows users to access User Preferences under the setup menu. User Preferences affects settings only for that particular user.
Change SMS setup	Restricts access to this area. In this area the practice can register for SMS reminders via MessageNet. Refer to the MedicalDirector Blue Chip Online Help for instructions on how to register and setup SMS messaging. This area also provides the means to change the wording of the Standard Message, when the SMS will be sent prior to the appointment, and also proxy server configurations if required.

Backdate Setup Section	
Manage month close-off	Allows the user to close off months to restrict backdating of transactions. This is useful for maintaining accuracy in financial/tax reporting. Month Close-off is found under the Setup menu > Practice. The year can be selected from the drop down list, and individual months can be clicked (ticked) to close-off the month, or clicked (unticked) to reopen the month. The Close All button (see over) will close off all the months. The years 2008 and before are locked by default.
Backdate invoices/receipts	The backdating functionality does not affect service dates, only issue dates. An invoice can record service dates in the past, but can only be issued on the current date (to which the computer is set). Granting the Backdate permission allows backdating of the Issue Date. As receipting doesn't require service dates, a receipt can only be issued on the current date when this permission in rescinded.
Forward-date invoices	Prevents users from creating and issuing invoices to a future date.

Appointments Setup

When the user is granted the Appointment Setup permission, they are able to define appointment types, appointment duration, practitioner plans, holidays and setting up SMS reminders for different appointment types.

To access the Appointments setup, within MedicalDirector Blue Chip, select **Setup > Practitioner > Practitioner Details**.



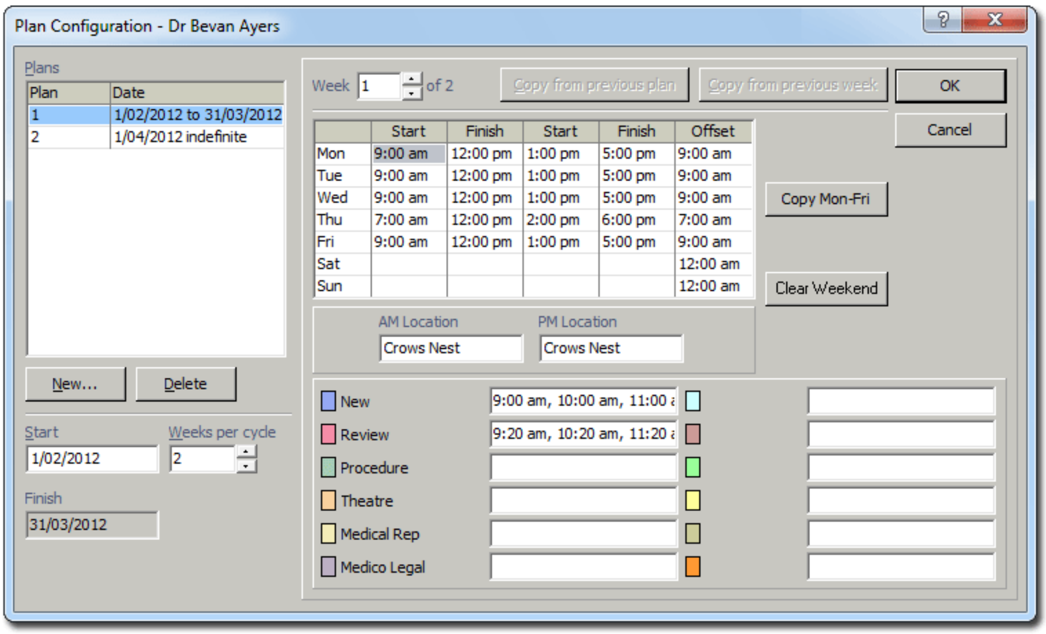
Editing Appointment Types

Select the Practitioner on the left (see above) to edit their appointment types.

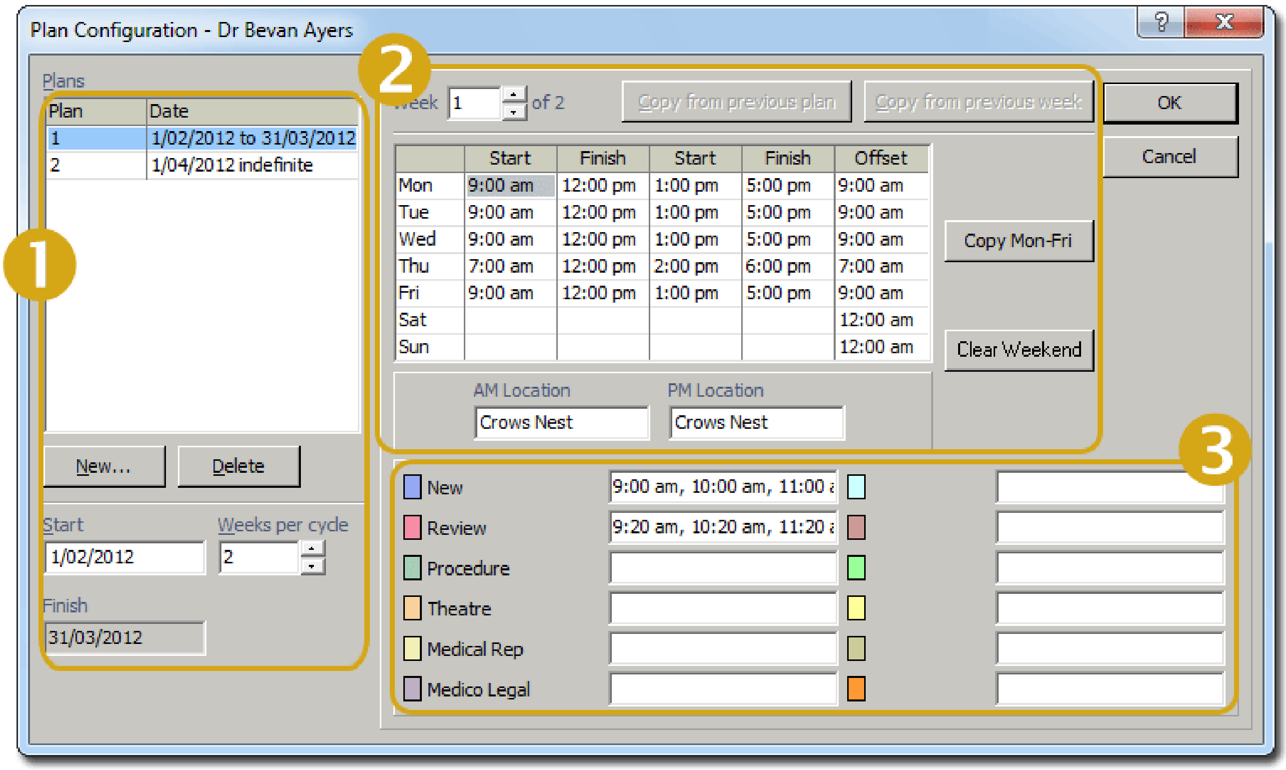
Then, edit the description, abbreviation, SMS opt-out, and Usual length as required. The length of the appointment can only be in multiples of the appointment slot size (which is a minimum size). The appointment slot size can only be changed with the assistance of a support team member.

Changing Practitioner Plans

Click the **Plans** button (as shown on the window above).



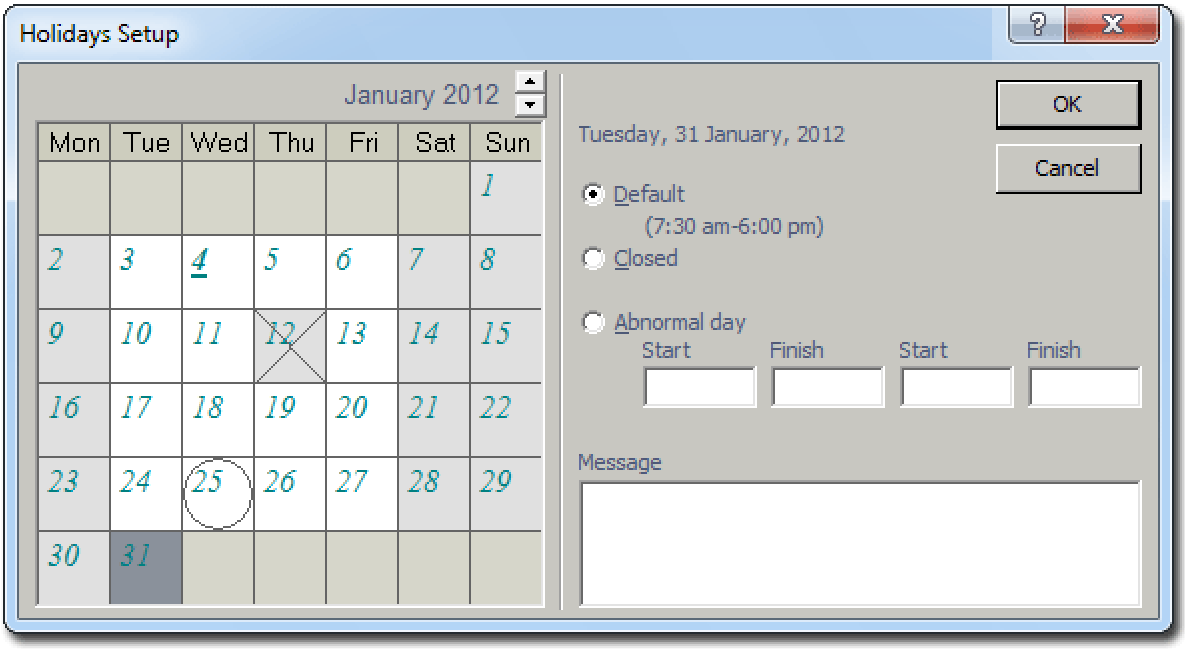
The Plan Configuration window is divided into three sections:



1	The start and end point of the plan and how many weeks per cycle. A new plan can be devised so that it seamlessly runs on from the old plan; or the old plan can be deleted, replaced by the new plan.
2	The weekly schedule. Week 1 of 2 (as shown above) indicates which week of the cycle is being displayed/defined. The 'copy from previous plan/previous week' buttons provide a quick way to populate the session times – useful when only minor changes between weeks/plans is required. The Copy Mon-Fri button can populate the week from the Monday entry. There are two sets of start and finish times per day to account for morning and afternoon sessions. Widening the time period between the first finish time and the second start time can accommodate a lunch break without having to make an appointment for it. The Offset refers to the time the calendar will jump to at the start of the first session. This is to allow 'emergency appointments' outside of the normal session times. The locations (am/pm) labels are where the session will occur which also appears in the appointment book.
3	For reserving appointments in the appointment book. Entering times to reserve appointments places a colour-coded square in the appointment book. This enables staff to search for appointments using the find slot button (refer to 2.7 MedicalDirector Blue Chip User Guide for more details).

Set Holidays

Click the **Holidays** button on the Practitioner Setup window.



Change the month using the button. In the example above, January is selected.

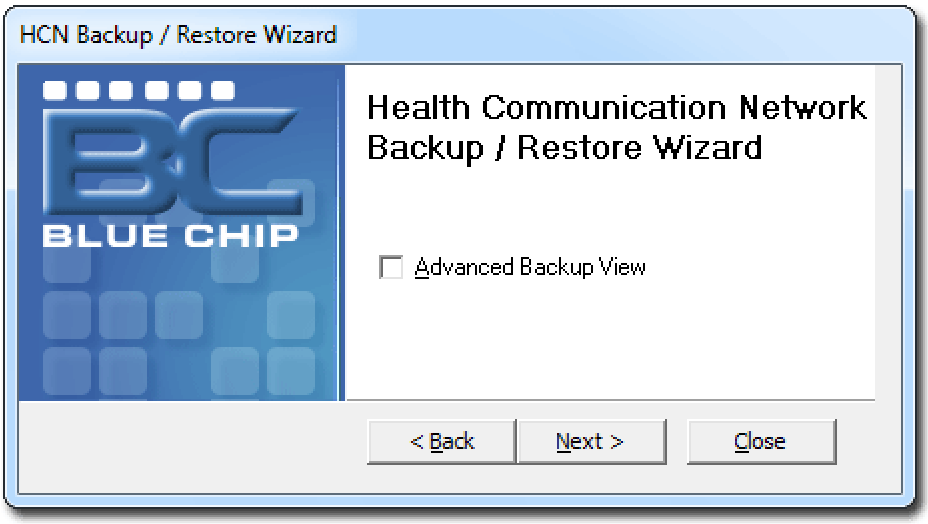
Select the required day on the calendar.

On the right-hand side are options for 'closing' the selected day or altering the start/finish times (by select the Abnormal day and configuring the time in the spaces required). A message can be typed which will automatically appear in the daily message portion of the appointment book to perhaps indicate as to why the change was made. Altering the session times or closing the day will result in the appointment book being greyed out, indicating a closed period.

HCN Backup

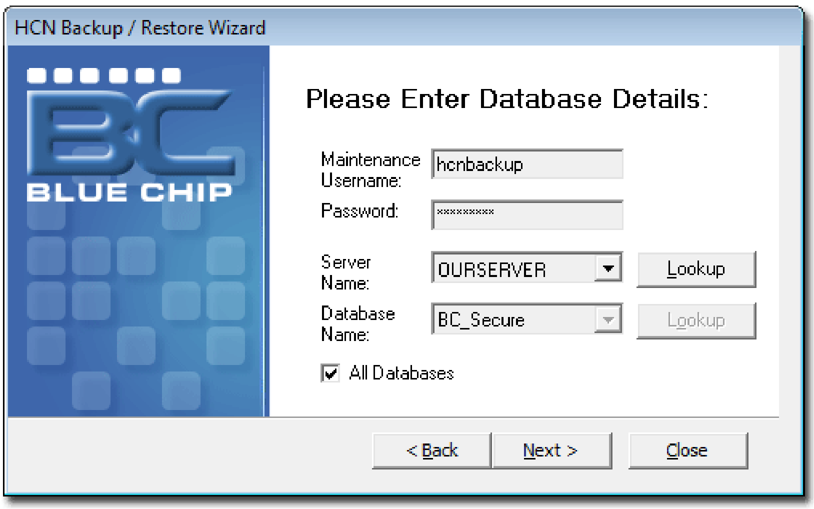
MedicalDirector recommends consulting your Systems Administrator about your data backup/disaster recovery requirements, to ensure your data is suitably protected.

1. To access the HCN Backup utility, select **BC Tools > HCN Backup**.



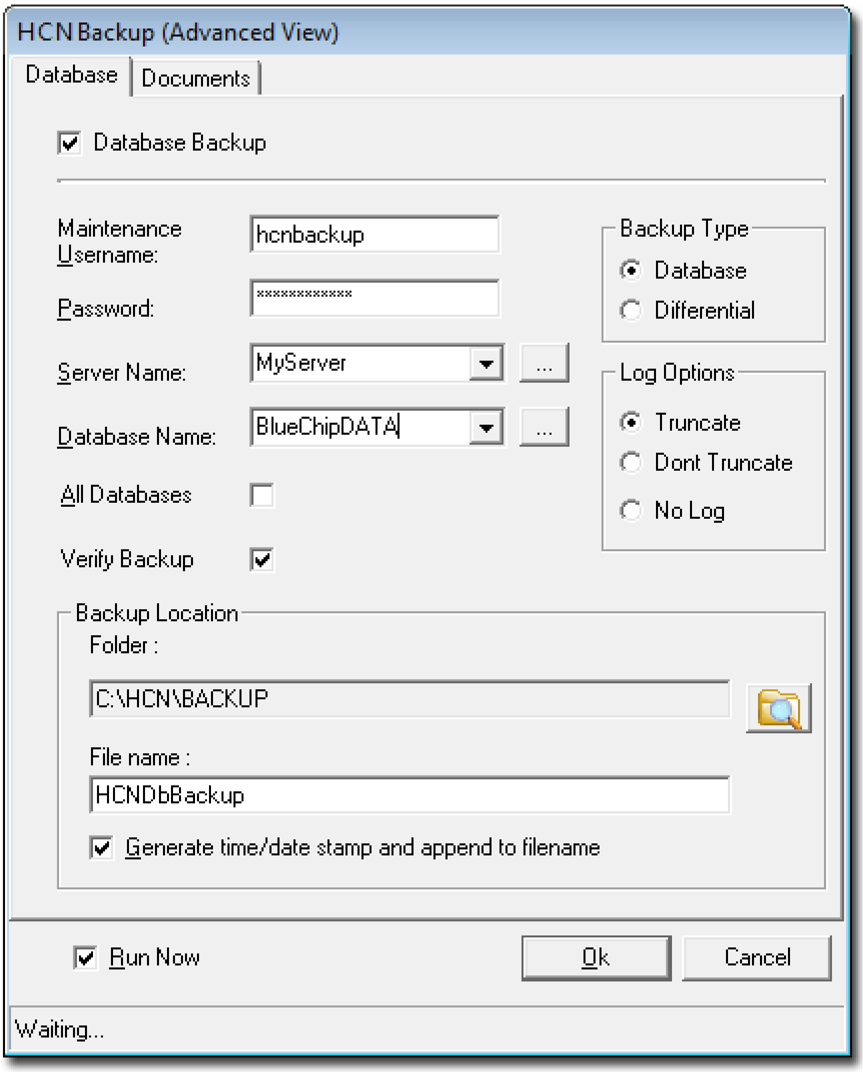
2. Click the **Next** button. Select the option you wish to undertake; Backup or Restore.
3. Click **the** Next button. You will be prompted to select to back up one of the following:
   - HCN Database Data
   - HCN Files (if you select this option, proceed now to step 7)
   - All HCN Data

4. Enter the Maintenance Username and Password (both of which are 'hcnbackup').
5. Ensure the server name reflects your computer name and HCNSQL07 (in most cases). The database name is the name of your live database



6. Click the **Next** button. The program will automatically create a folder on C: drive, C:\HCN\BACKUP which will contain the contents of the backup if running this utility for the first time. Otherwise the backup will be added to the folder (date stamped) not overwriting the existing backup file.
7. You will be notified when the backup is complete. Click the **OK** button then **Close** to exit the wizard.

If you select 'Advanced View' in step 2, the backup location can be specified – this could point to a removable hard drive or an offsite location.



The documents tab allows you to specify where correspondence can be backed up to.

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