MedicalDirector PracSoft Set-up Guide

This MedicalDirector PracSoft Set-up Guide is intended to assist new customers with configuring the minimum required setup for your Practice. It is recommended that you read this guide thoroughly beforehand, to assist you in gathering the information needed for MedicalDirector PracSoft first-time use. Note also that you may need assistance from your Systems Administrator with some of the settings outlined following.

Beyond the basics presented in this guide, consider the guide **Getting Started with MedicalDirector PracSoft** to quickly become familiar with MedicalDirector PracSoft's core functionality; the basic features of MedicalDirector PracSoft that you will use every day. Detailed tutorials are found in the Online Help, accessed by pressing F1 from anywhere within MedicalDirector PracSoft. Knowledge Base articles are also available online via **www.medicaldirector.com/kb**. Should you require further assistance relating to your MedicalDirector PracSoft software, please contact MedicalDirector Customer Care on 1300 788 802 or log an enquiry online via **http://medicaldirector.com/Quick+Links/Create+A+Support+Enquiry**.

Before You Begin

Initial Set-up Requirements

☐	MedicalDirector PracSoft Licence Key.
☐	Your bank account details and Merchant ID[1].
☐	Details of at least one practitioner, including Provider No. and Payee Provider No (if different).
☐	At least one installed printer.
☐	The latest MBS Fees update, and update guide, available from **http://medicaldirector.com/Gp+Practice+Mgmt/Gp+Practice+Mgmt+Product+Updates/Subscriber+Only+Downloads**
☐	Your Practice letterhead details.
☐	Ensure you are using the correct Windows date format for your Invoices and Medicare Claims to be processed correctly; the Regional Option is set to English (Australia), and the short date format is dd/MM/yyyy

Online Claiming Requirements

☐	If you intend to perform online claiming, register for and obtain your **PKI** certificate(s). **www.medicareaustralia.gov.au/provider/business/online/register/apply.jsp**

eHealth Requirements[2]

☐	Ensure your practice is registered for ePIP.
☐	Obtain a **Healthcare Provider Identifier – Organisation (HPI-O)** number. For information, visit the Medicare for Healthcare Professionals web site **www.medicareaustralia.gov.au/provider/health-identifier/index.jsp#N10097**
☐	Obtain a **Healthcare Provider Identifier – Individual (HPI-I)** number. For information, visit the Medicare for Healthcare Professionals site **www.medicareaustralia.gov.au/provider/health-identifier/index.jsp#N1012B**
☐	Obtain **IHI Signing** and **IHI Encryption** certificates (if you have not already done so for online claiming), ensuring they have been updated for access to HI Service. **www.medicareaustralia.gov.au/provider/health-identifier/index.jsp#N10271** Obtain the installation guide: 'PIP eHealth Incentive Requirement - 1 Healthcare Identifiers' **http://medicaldirector.com/Gp+Clinical/Gp+Cl+Ehealth/Pdf+Guides**

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[1] *Optional – obtained from your TYRO EFTPOS Device if you use one.*

[2] *See also Knowledge Base article 'Easyclaim and Online Claiming with PracSoft' available from the MedicalDirector Knowledge Base at* **www.medicaldirector.com/kb**

Opening MedicalDirector PracSoft for the First Time

Registering MedicalDirector PracSoft

1. Locate and double-click the MedicalDirector PracSoft icon on your Desktop. MedicalDirector PracSoft will open and you will be prompted to log on.

2. To register MedicalDirector PracSoft, select the **HCN Live Database** from the databases drop-down list.

3. When prompted, enter the Licence details exactly as supplied to you by MedicalDirector. Click **Validate**. Click **Save** and then **Close** to continue. MedicalDirector PracSoft prompts you to log in. As this is the first time you have run MedicalDirector PracSoft, there will not be any users in your database. Click **OK** to continue. You will be able to add a new user shortly.

Adding Bank Account Details

On opening MedicalDirector PracSoft for the first time you will be prompted to add at least one bank account.

1. On the prompt click **OK**. The **Bank Account Setup** window appears.

2. Click **Add**. The **Bank Account Details** window appears. Insert the following details:

   o **Account Code**: Max of 3 characters.
   o **Description**: Printed at the top of your banking summary.
   o **Merchant ID (optional)**: Supplied by TYRO, for use with EFTPOS Auto or Medicare Easyclaim.

3. Click **Save**, then **Close**.

Create a Letterhead

You will be prompted to create a letterhead. This can be modified later. Click the **OK** button.

1. Click **Add New**. Name the letterhead and click **OK**. The name appears in the 'Name' section and 'Letterhead Items' section - the area in which you design your letterhead.

   This example indicates that:

   o The first line of text on the printed letterhead will be 'The Surgery'.
   o This text will appear 20 points (distance) from the top of the page.
   o The font is 18-point Arial, bold, centered.

2. To add a new line to your letterhead, click **Add Item**.

3. Edit the Position, Alignment and Font style to suit. Click **Save** to confirm.

4. Click **Close** when you are happy with the letterhead design.
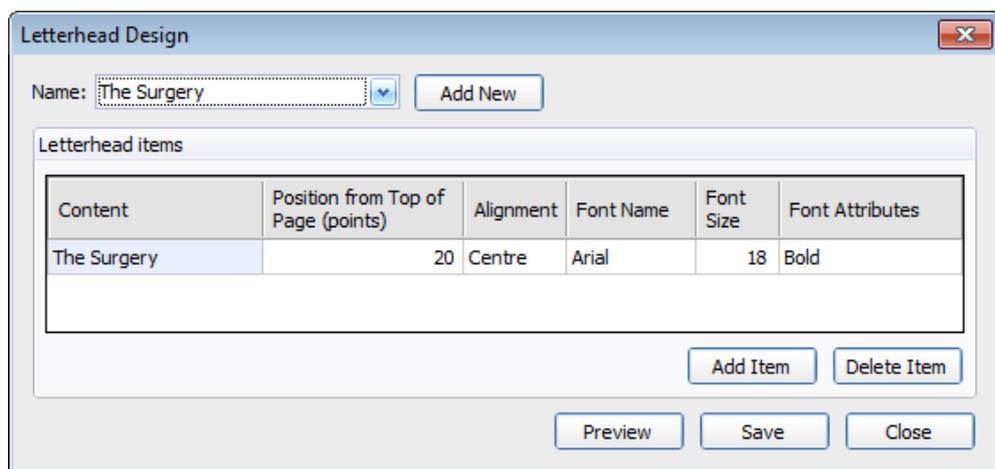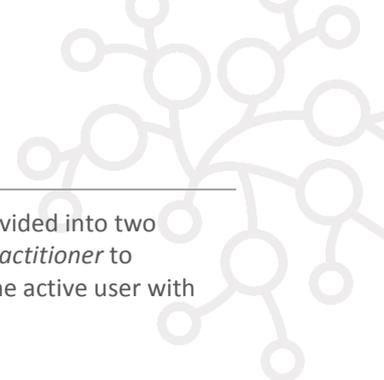
Add a Practitioner

You will be prompted to add a user to your database. All users[3] in MedicalDirector PracSoft are divided into two groups; 'Practitioners' and 'Users' (i.e. non-clinical staff). The following steps describe adding a *Practitioner* to MedicalDirector PracSoft. This particular practitioner will have Level-9 security access - at least one active user with level-9 (full) access is required.

1. Click the **OK** button when prompted. The **User List Window** appears. It will initially be empty.

2. Click **Add** to add a new user. The **User Details** window appears.

3. Add the following details:

   o **User ID**: Enter the initials of the Practitioner or other relevant code.
   o **User Type**: Practitioner.
   o **Full Name**: Enter the name as you wish it to appear in correspondence and on invoices.
   o **Security Level**: Ensure Level-9 is selected.
   o **Summary Data View**: Select the appropriate option (only available to 'Practitioners');
     • *All Doctors Billings*: All billing information per day is accessible via the Day sheets.
     • *Own Billings*: Own billing information per day is accessible via the Day sheets.
     • *None Allowed*: Billing information will not be accessible.

4. Click **Save**. Enter a password, and then click **Save** again. You will be prompted to enter the Practitioner's details.

5. Click **Yes**. The **Practitioner Details** window appears. Complete the following required details:

   o **Location** e.g. 'Surgery', 'Room 1' etc.
   o **Provider Number / Payee Provider Number**: Required for issuing an account / Bulk Bill.
   o **Practitioner Type**: 'GP' or 'Specialist'.
   o **Letterhead Code**: Practitioners (other than locums) may have their own or share a practice letterhead.
   o **Bank Account Code**: Practitioners (other than locums) may have their own bank account.
   o **Practitioner Status**: Select the most appropriate description.
   o **HPI-I No**: Healthcare Provider Identifier-Individual.

   See 'Practitioner Details' in the MedicalDirector PracSoft Online Help (press F1) for more information about this window.

6. Click **OK** when you have finished entering the Practitioner's details. You can always edit this later. You will be returned to the User List window. Click the **Close** button to continue. Add more users later via **Admin > User List**.

7. You will be returned to the original Logon window, where you can now select the practitioner you just created, enter their password, and click the **OK** button. After logging on, cancel the SMS Reminder prompt by clicking the **Later** button. Setup SMS Reminders later via SMS > Setup SMS Reminders.

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[3] *A user is typically the practice manager and/or reception staff. You cannot bill to a user. User details can be edited via Admin > User List. A practitioner **is** typically a doctor or other health care professional. You can only bill to a practitioner. Practitioner details can be edited via Admin > Practitioners.*

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Adding Institutional Payers

An institutional payer is essentially a third party, such as an insurance agency that pays the patient's bill.

1. Select **Admin > Institutional Payers**. The **Select Institutional Payer** window appears. Click the **Add** button to add a new Institutional Payer. The **Institutional Payer Details** window appears.

2. Add/Edit information as desired, ensuring you enter a code to identify this Institutional Payer from others. In the Default Fee Column drop-down list you may select the fee rate applicable to this Institutional Payer. If the fee rate you desire is not available in the list, you must add it first (explained following). Click the **Save** button to confirm.

Importing and Managing Fees

Importing Fees

Consult the Knowledge Base Article 'Updating MBS fees in MedicalDirector PracSoft', available from
http://medicaldirector.com/toplinks/customer+knowledge+base/86

Creating Customised Fees

1. Select **Setup > Fee Columns**. The **Fee Column Configuration** window appears. Each row in this window represents a different fee column in the Fee Listing window.

2. Select a fee row to edit and click the **Edit Column** button. *'Unused' rows at the bottom are for you customised fees.* The **Fee Column Details** window appears.

3. Enter a Fee Name and a Billing Code. Optionally enter a formula to calculate the fee. For example, a formula for 1.5 times the Schedule Fee (i.e. 50% greater), type **[SchedFee]*1.5**. The mathematical operators +, -, * and / are supported.

4. (Optional) Select a Rounding Type and Value as appropriate from the drop-down lists supplied. For example, using a combination of Rounding Type and Value, you could round-up fees to the nearest 10 cents.

5. Enter the Display Order to modify the position of this fee column in the Fee Listing window. Click the **Save** button.

Adding Fees

You may not wish to wait for MedicalDirector's biannual fee release, or you may wish to create or modify a customised fee. To account for this, MedicalDirector PracSoft provides a facility for managing fees.

1. Select **Admin > Fees** to open the **Fee Listing** window.

2. Click the **Add Item** button. A new fee row appears at the bottom of the list of fees.

3. Begin entering the fee's definition by starting with the item number. This can be either:

   o An item number supplied by Medicare Australia, or
   o A customised number.

4. Press the tab key on your keyboard to move to the next field.

   o If the number you have entered is customised, enter a description for the fee and enter the fee amount(s). It is recommended that you do not add an amount to any Medicare Australia columns (Schedule Fee, Rebates, etc.) as this customised fee will be Practice-specific, and cannot be billed to Medicare Australia.

   o Note also that a message may appear indicating that the data will be truncated - this simply refers to 'description' text too long for the Description field. Select OK to automatically shorten the description.

5. Click the **Close** button to save your changes.

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Managing GST

Select **Admin > Fees**. The **Fee Listing** window appears. By default, for each Registered Practitioner who uses GST, each Service Item has GST applied to it automatically when recording a patient's visit. For *non*-GST Service Items, tick the check box in the **GST Not Applicable** column.

Recalculating Fees

If you have created a fee formula for a customised fee, or the standard fee columns have changed after updating them, you will need to recalculate each customised fee column.

1. Select **Setup > Fee Columns**. The **Fee Column Configuration** window appears.

2. Select the row corresponding to the fee you wish to calculate to activate the **Recalculate** button.

3. Click the **Recalculate** button. If you have entered an inaccurate formula, an error message is displayed. Click OK to close the error message, fix the formula and recalculate again. No fee amounts are altered if a formula is incorrect.

Applying Fees to Practitioners

For each practitioner you must nominate the fee columns that apply to the various patient concession levels.

1. Select **Admin > Practitioners**. Double-click the practitioner record you wish to edit.

2. Within the **Practitioner Details** window, locate the options/values relating to 'Billing'. Select the appropriate values from the drop-down lists provided. Note that this is also where you indicate the practitioner's GST preferences. Click **OK**.

Applying Fees to Institutions

For institutional payers you may nominate the default fee columns that are charged.

1. Select **Admin > Institutional Payers**. The **Institutional Payers** window appears.

2. Select an institutional payer from the list and click **Edit**. The **Institutional Payer Details** window appears.

3. Select the appropriate fee for this institution from the Default Fee Column drop-down list. Click the **Save** button.

Appointments and Appointment Books

Creating New Appointment Books

1. Select **Waiting Room > Appointments** to open the Appointments module. The default Appointment Book appears.

2. Select **Setup > Manage Appointment Books**. The **Manage Appointment Books** window appears.

3. To create a new Appointment Book, click the **Add** button. The **Add New Appointment Book** window appears.

4. Enter a description for the Appointment Book; simply name it if you wish. Click the **OK** button to confirm.

Synchronising Practitioners in the Appointment Book

Practitioners must be added to the Appointments module before you can schedule appointments for them.

The recommended method of adding practitioners to the Appointments module is to *synchronise* the Appointments module with MedicalDirector PracSoft. This copies all registered practitioners from MedicalDirector PracSoft to the Appointments module.

Alternatively you can *manually* add a practitioner to the Appointments module. Note that if you use this method but do **not** synchronise with MedicalDirector PracSoft, patients you appoint these new practitioners may not be visible in the Waiting Room. Therefore, it is highly recommended that if you manually add a practitioner to the Appointments module, you *also* add them to MedicalDirector PracSoft, and then *perform a synchronisation*.
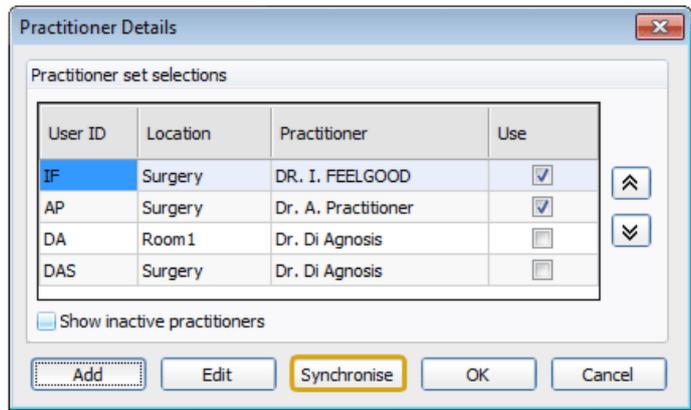
To Synchronise the Appointment Book:

1. Open the Appointment module by clicking the 📘 button, and then select **Setup > Practitioners**.

2. Click the **Synchronise** button. You will be prompted to add any practitioners from MedicalDirector PracSoft that are *not* currently available to the Appointments module.

   *If you created a practitioner in the Appointments module first and then added them to MedicalDirector PracSoft, and are now trying to synchronise the two, you should **not** be prompted to add them; MedicalDirector PracSoft should see the identical records, and automatically synchronise them when you click Sync. If you **do** get prompted to copy a practitioner from MedicalDirector PracSoft to the Appointments module when they are **already** in the Appointments module, this suggests that MedicalDirector PracSoft thinks they are **two different records**, usually because the Practitioner Code and Location information you entered for these records is somehow different. In this case, click the No button to ignore the prompt request. Then, go back and check that the Practitioner Code and Location information for this practitioner in the Appointments module is identical to that recorded in MedicalDirector PracSoft. If there is even a slight difference, you must edit this information via the Appointments module (a practitioner's information cannot be altered in MedicalDirector PracSoft itself). Then, try to synchronise again - this time you should not be prompted to copy them from MedicalDirector PracSoft.*

3. The Practitioner Details window will now display the new practitioner(s) brought over from MedicalDirector PracSoft.

4. To ensure these practitioners are visible to the Appointment Book, tick the **Use** check box. Click the **OK** button.

Online Claiming

Setup the Location Store

Consult KBA '**Easyclaim and Online Claiming with MedicalDirector PracSoft**' available from
www.medicaldirector.com/kb

Setup Location Certificate details in MedicalDirector PracSoft

On the Server:

1. From the MedicalDirector PracSoft main screen select **Setup > Workstation Settings**.

2. Click the ellipse ⬜ button and browse to the location where you want to store the hic.psi.

On the Workstation(s):

1. From the MedicalDirector PracSoft main screen select **Setup > Workstation Settings**.

2. Click the ellipse ⬜ button browse to the location of the hic.psi.

3. Enter and save the Store password.

Activate Online Claiming in MedicalDirector PracSoft

1. From the MedicalDirector PracSoft main window, select **Setup > Global Settings**.

2. Tick the 'Use Online Claiming' checkbox.

3. Ensure that:
   o Medicare Australia Server = www2.medicareaustralia.gov.au/pext
   o Medicare Australia Recipient = ebus@medicareaustralia.gov.au

4. It is recommended that you also tick:

   o **Single Claim Receipting**.
   o **Auto-Claim Number Generation**: Claim numbers will be automatically incremented and displayed when batching.
   o **Separate BB/DVA Sequencing**: Different letters used to distinguish Medicare and DVA claims.

5. Select the **Bulk Billing** tab.

6. Enter your Minor Customer ID (also known as the HSS number). Click the **Save** button.

Setting up Practitioners to use Online Claiming

1. From the MedicalDirector PracSoft main window, select **Admin > Practitioners**.

2. Select the Practitioner you wish to edit from the list and click the **Edit** button.

3. The **Practitioner Details** window appears.

   3.1. Tick **Online Claiming Agreement Signed** so the practitioner's claims appear in the online claiming window.

   3.2. Tick **Added To Location Certificate**.

   3.3. (Optional) Tick **Patient Claims** to send private invoices and receipts to Medicare Australia.

   3.4. (Optional) Tick **Individual Signing** (using the iKey/Smartcard token), if their individual certificate is installed.

   3.5. Indicate the practitioner's **Incentive Payment** preferences.

   3.6. Click the **Save** button.

   Repeat these steps for all practitioners who wish to use online claiming.

4. Close and reopen MedicalDirector PracSoft.

Other Important Settings

Printers

You can configure printers in MedicalDirector PracSoft so that the correct format is used for each type of print job, without affecting your default Windows printer settings. Within MedicalDirector PracSoft select **Setup > Printers**. To edit the printer settings for a particular function click the ⌞…⌟ button or **Setup** button for that function.

- o **Accounts/Receipts**: Printed using the selected settings (printer, tray destination and paper size).
- o **Medicare PC1**: Pre-printed stationery supplied by Medicare. For multi-tray printers, specify the correct tray. To configure printing Medicare PC1 forms, consult the MedicalDirector PracSoft Help (press F1).
- o **Online Claiming Reports**: Must be printed 'Landscape' to fit all details.
- o **Labels**: Select the appropriate printer, tray and settings as desired.
- o **Online Claiming Forms/Medicare DB4**: The form patients sign for Bulk Billing or DVA billing, on A5/A4 plain paper.

Practice Address Details

Before recording a visit for a patient you must enter the Practice's address details.

1. Select **Setup > Practice Details**. The **Practice Details** window appears.

2. Enter a minimum of Practice Address, City/Suburb, Postcode and State. The option to '*Use practice suburb and postcode as default for new patients*' will automatically populate the suburb and postcode of all new patients with that of the Surgery.

eHealth Settings

Please consult the guide '**PIP eHealth Incentive Requirement - 1 Healthcare Identifiers**', available from **http://medicaldirector.com/gp+cl+ehealth/video+guides**.

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