



## PracSoft Quick-Start Guide



## Introduction

Thank you for purchasing PracSoft 3, Australia's fastest growing Practice Management software solution. PracSoft assists medical practices in managing their appointments, billing, reporting and Medicare Online Claiming efficiently.

PracSoft is developed and sold by Health Communication Network (HCN), Australia's market leader in the clinical and practice management software industry. More than 3,300 subscribers currently use PracSoft in their practices. Coupled with Medical Director, this suite offers demonstrable improvements in healthcare delivery.

This PracSoft 3 Quickstart Guide is intended to guide new subscribers through the required customised setup for your practice. It entails setting up of users, bank accounts, registering for Medicare Online claiming options, issuing accounts and much, much more.

Detailed information about PracSoft can be found in the Online Help, available by pressing F1 from anywhere in PracSoft. System requirements for HCN software applications are available from the HCN Knowledge Base via [www.hcn.com.au](http://www.hcn.com.au).

Should you require further assistance relating to your PracSoft software, please contact PracSoft Technical Support on 1300 788 802 or log a call online via [www.hcn.com.au](http://www.hcn.com.au)





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## Before You Begin

You will require the following information:

- Your Bank Account Details
- HCN PracSoft Licence Key
- Details of at least one Practitioner
- Details of at least one installed Printer
- Your Practice Letterhead

## Changing the System Date Settings in the Windows Control Panel

On first opening PracSoft you may see the following message:

*Your Windows date formatting settings are incompatible with PracSoft. Expected format is 'dd/mm/yy' or 'dd/mm/yyyy'. Please change your system's date settings before restarting PracSoft.*

Ensure you are using the correct date format order for your Invoices and Medicare Claims to be processed correctly.

- Ensure the Regional Option is set to English (Australia).
- Ensure the short date format is dd/MM/yyyy

### Setting Regional Options (for Windows XP):

1. Open the Windows Control Panel (usually accessible via the Windows Start Menu).
2. Double-click **Regional and Language Options**.
3. Locate and select **English (Australia)**.
4. Click **Customise**.
5. Select the **Date** tab. Ensure the **Short Date Format** is set to **dd/MM/yyyy**.
6. Click **Apply**, and then **OK**. On the main Regional Options window also click **Apply** and **OK**.

## Printers

You must have a printer installed prior to opening PracSoft for the first time. Please consult your Network Administrator if you require assistance. Alternatively, the following instructions will enable you to install a *temporary* printer. Note that these instructions simply allow you to open and run PracSoft for the first time. Later if you wish to print real data from PracSoft, you must install and configure your actual printer.

1. Via the Windows Start Menu, locate **Printer and Faxes**. This option differs between Windows versions.
2. Click the **Add a Printer** link in the menu to the left of the Printers and Faxes window.
3. On the 'Welcome' screen, click **Next**.
4. Select the option to add a **Local** printer. *De-select* the check box for automatically detecting your printer - you will install it manually, as explained following. Click **Next**.
5. Select the **Use the Following Port** option. From the list of available printer ports, select **FILE: (Print to File)**.
6. Click **Next** to continue. For the purposes of setting up a temporary printer you may select any printer from the list provided.
7. Click **Next** to continue. Name the printer, to identify it from others.
8. Click **Next** to continue. Share the printer with others on your network if desired.
9. Click **Next** to continue. You will be prompted to print a test page.
10. Click **Next** and then **Finish**. Windows will now install your selected printer's driver.

## Opening PracSoft for the First Time

### Registering PracSoft

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

2. You can use PracSoft in trial-mode by selecting the HCN Sample Database from the Databases drop-down list. However, to register PracSoft, log into the HCN Live Database.
3. You will be prompted to enter your registration details. Click **Yes** to continue.
4. Enter the Licence details exactly as supplied to you by HCN, then click **Validate**. Valid Registration Keys display in green, and the License Details section shows your Practice data. Update licence details via: **HCN Maintenance > Database Tasks > Common > License details**.
5. Click **OK** to continue. PracSoft prompts you to log in. As this is the first time you have run 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 PracSoft for the first time you will be prompted that there are no bank accounts set up. You must add at least one bank account to continue.

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

Account Code	Merchant ID	Account Description
WES	2222	Dr A Practitioner
SWE	1111	Dr Feelgood

2. Click **Add**. The **Bank Account Details** window appears.

3. Insert the following details:
  - o **Account Code:** Max of 3 characters.
  - o **Description:** Printed at the top of your banking summary.
  - o **Merchant ID:** Supplied by TYRO, for use with EFTPOS Auto or Medicare Easyclaim (see page15).
4. Click **Save**, then **Close**. You will be prompted that no letterheads can be found. You must add at least one letterhead to continue. Click the **OK** button now.

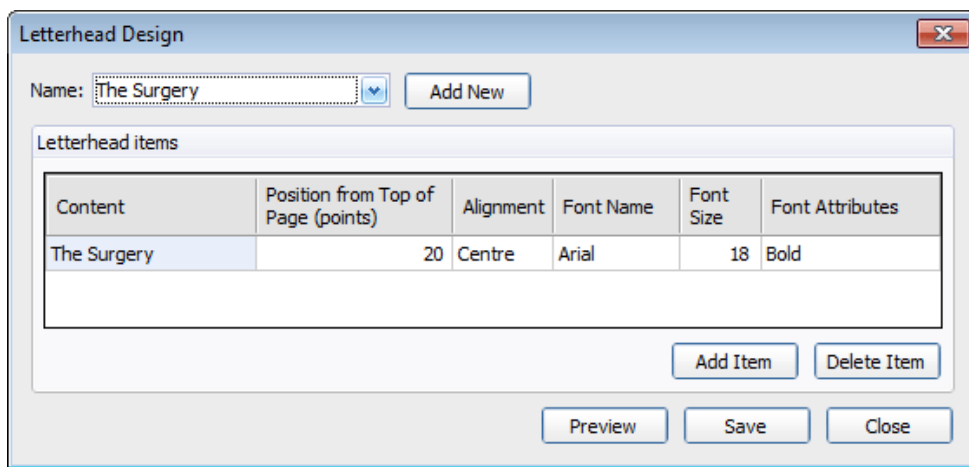
**Additional Information:**

- o Practitioners can have individual bank accounts, or they can share accounts.
- o For individual accounts, it is useful to use the same code as the practitioner’s user code for the bank account, e.g. the practitioner’s initials. See ‘Add a Top-Level User’, page 7.
- o Add as many bank accounts as you wish.
- o Edit accounts via **Setup > Bank Accounts**.

## Create a Letterhead

On opening PracSoft for the first time you will be prompted to create a new Letterhead.

1. To add letterheads, click **OK**.
2. To create a new letterhead, 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



The example above indicates that:

- o The first line of text to appear 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 used will be 18-point Arial, bold and center-aligned.
3. To add a new line to your letterhead, click **Add Item**. A new line will appear in the Letterhead Items section, ready for you to add text (for the next line of your Letterhead). Add another line of text if desired.
  4. Edit the Position, Alignment and Font style to suit. Click **Save** to confirm.
    - o To delete a line, select it and click Delete Item.
    - o You can preview your letterhead in Print-Preview mode. First ensure you have saved the letterhead by clicking Save, then click Preview.
    - o Letterhead details can be reviewed and edited later via: **Setup > Letterheads**.
  5. Click **Close** when you are happy with the letterhead design.

## Add a Top-Level User

PracSoft detects that you have no users in your databases, and prompt you to add one.

1. Click the **OK** button when prompted. The **User List Window** will appear. The list will be empty the first time you open PracSoft.
2. Click **Add** to add a new user. The **User Details** window appears.

3. Add the following details:
  - **User ID:** Enter the initials of the user or other relevant code.
  - **User Type:** ‘User’ or Practitioner<sup>1</sup>.
  - **Full Name:** Enter the name as you wish it to appear in correspondence and on invoices.
  - **Security Level:** Ensure Level-9 is selected - at least one active user with level-9 (full) access is required.
  - **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.
  - If you added a ‘User’ you have finished creating the user login.
  - If you added a ‘Practitioner’ you will be prompted to enter the Practitioner’s details. Click **Yes** to continue.

## Adding a Practitioner to PracSoft

### Required information:

- **Location** e.g. ‘Surgery’.
- **Provider Number:** Required for Medicare Australia’s Online Claiming (deselect if not applicable).
- **Payee Provider Number:** Also required for Medicare Australia Online.
- **Practitioner Type:** ‘GP’ or ‘Specialist’.
- **Letterhead Code:** Practitioners (other than locums) may have their own or share a practice letterhead.
- **Bank Account Code:** Practitioners (other than locums) may have their own bank account.
- **Practitioner Status:** Select the most appropriate description.

<sup>1</sup> 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. When adding a practitioner you will be prompted to enter the practitioner’s details after saving a password. Practitioner details can be edited via Admin > Practitioners.

**Optional information:**

- **Default Billing Item Number and Fees.**
- **Default Item No:** This number will appear by default when billing to this Practitioner.
- **No Concessions:** If a patient’s details indicates ‘No Concessions’, the selected fee rate will be billed by default.
- **Discount Concession, Health Care Card and Pensioner** types will also bill the chosen fee rate by default where this is specified in the patient’s details.
- **Veteran Affairs:** Select a Veteran Affairs rate e.g. ‘Veteran fee’ or ‘Veteran LMO Fee’.
- **Bulk Bill check boxes:** Prompt patients where the corresponding concession type is specified in their record.
- **Incentive Payments.**
- **Medicare Plus:** ‘MediCare Plus’ auto-adds 10990 to invoices where applicable. ‘MediCare Plus - Rural’ auto-adds 10991 to vouchers where applicable.
- **Apply VAP Incentive:** 10990/10991 is added to Veterans Affairs vouchers based on the Medicare Plus selection.
- **LSPN (Location Specific Practice Number):** Used for self-referred services via Medicare Australia Online.
- **Referral Required:** Used mainly by Specialists for recording referral details when billing.
- **Practice Group:** Statements sent for overdue services from the ‘Statements’ section can be separated by ‘Practice Groups’. You can separate employee practitioner’s statements from the Principle or Locum Doctors. Practitioners with the same Practice Group number will appear on the same Statement run.
- **Send Scheduled SMS Reminders:** When enabled SMS reminders can be sent to the Practitioner’s patients.
- **Mark Inactive:** If you no longer need to bill to a practitioner you can mark them as Inactive.
- **Auto Capitalise:** Capitalise the first letter of every word.
- **Online Claiming Agreement Signed:** Available with Online Claiming active (**Setup > Global Settings**). When enabled, further options become available;
  - **Individual Signing:** For selecting individual signing of Medicare Australia claims for this Practitioner using an ikey - a USB stick provided by Medicare Australia that you connect to the computer when preparing claims.
  - **Patient Claims:** Indicates this practitioner provides online private patient claiming.
  - **Dental Practitioner / Allied Health:** Allow Medicare Australia Online services for such users.
  - **Added to Location Certificate:** Verifies the doctor has been added a Location Certificate for Online Claiming.



## Adding Specialists to PracSoft

Add a Practitioner, but also tick the 'Referral Required' check box to record referral details when billing. You can also indicate default items numbers 104 and 105 for the Specialist, which are added via the Practitioner Details window. Information on adding referring practitioners, and billing for specialists is available within the PracSoft Help.

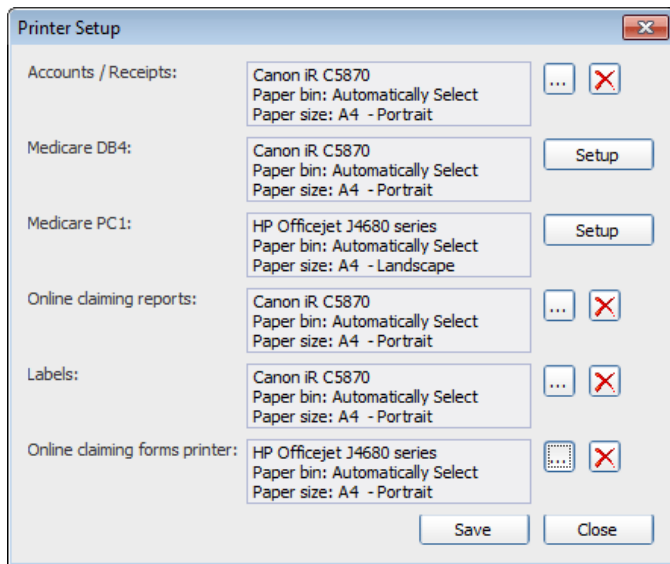
## Logging On


1. Select HCN Live Data and the Level-9 user you created.
2. Enter your password and click OK. You will be prompted to set up SMS Reminders. Whilst a valuable tool, it is not a requirement for running PracSoft for the first time. Cancel the SMS Reminder setup wizard for now. Setup SMS Reminders later via **SMS > Setup SMS Reminders**.

## Configure Printers

PracSoft uses your default Windows printer unless instructed otherwise. You can setup printers in PracSoft so that the correct format is used for each type of print job. Changing print settings in PracSoft will not affect your default Windows printer.

1. Within PracSoft select **Setup > Printers**.



2. 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 PracSoft Help.
  - 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 or A4 plain paper.

## Enter 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.

## Downloading and Importing (MBS) Fees

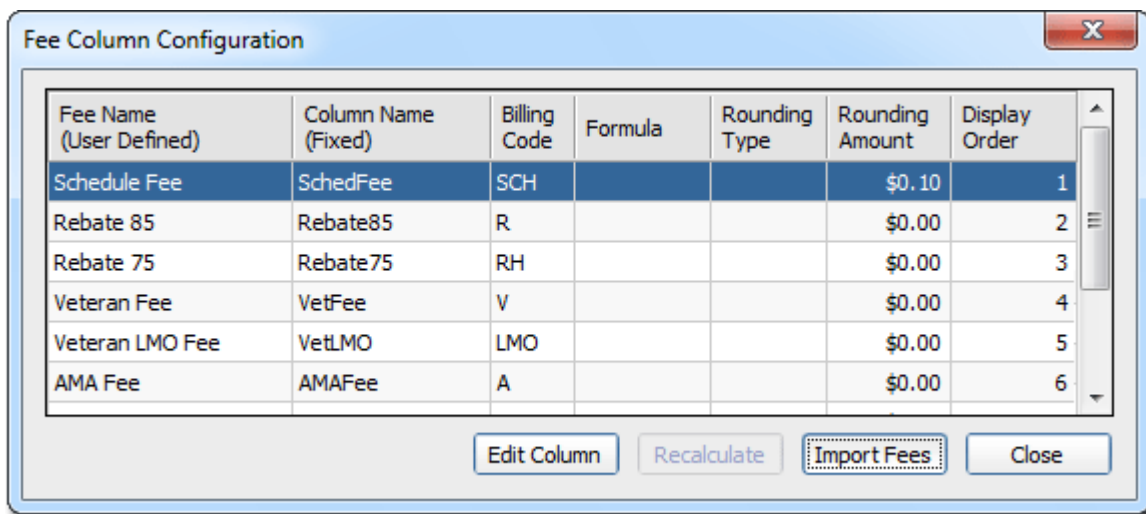
MBS Fee item numbers are updated periodically. The importation of fees into PracSoft *cannot* be performed through a Remote Desktop or Terminal Session. It is recommended that this update is performed on the *server* computer, and must only be used for PracSoft 3.1.2 or later.

The following instructions need only be followed once, on one computer, preferably the server computer. For terminal server sites, this must be performed on the console, not via a remote session.

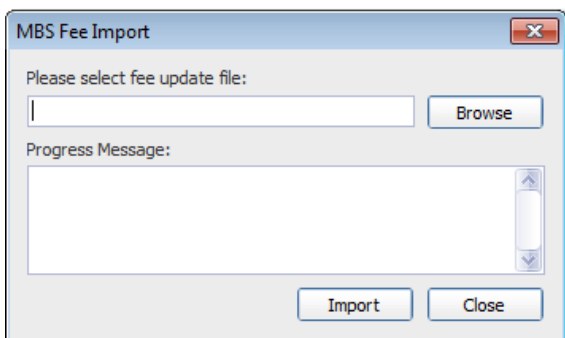
**1. Obtain the July 2011 MBS fees update file:**

From the HCN website (<http://www.hcn.com.au/support+&+downloads/downloads>) locate and click the PracSoft MBS fees update. In the following example, the file is called july2011.exe. MBS fees are available from the subscriber's only section of the downloads page. You will need your subscriber's username and password.

2. When prompted, select the option to save the file to your computer. Please note the filename and location for reference.
3. After the file has finished downloading, browse to and double-click the july2011.exe file to begin extraction. This file does *not* install or update the fees for you - it simply extracts the fees files ready for importing to PracSoft, as explained following. If prompted with a windows security warning popup, click the run/yes button.
  - \*you may be required to be logged into windows as an administrator to extract this file.
4. When prompted, click the **ok** button.
5. You will be presented with a winzip self-extractor prompt. The self-extractor will extract the MBS fees, ready for importing to PracSoft. Click the **setup** button to continue. The extraction will commence, and proceed quickly. You will *not* be prompted upon completion.
6. Run pracsoft, and log on as a user with a security level of 2 or higher.
7. Select **setup > fee columns**. The **fee column configuration** window appears.



8. Click the **import fees** button. The **MBS fee import** window appears.



9. Click the **browse** button.
10. Locate and select new fees file. Example: jul2011.mbs. The default path to the update file will be selected by default (d:\program files\health communication network\common\hcninstmgr)

*Note that your windows installation may be configured to not display the .mbs file extension.*

11. With the jul2011.mbs file selected, click the **open** button.
12. Click the **import** button
13. You will be notified when the fees have been successfully imported.

Any fee columns that have been generated by the surgery that include formulas will need to be recalculated. Please consult the PracSoft help for instructions on recalculating fee columns.

To test that the fee update was successful, add a new item number by selecting admin > fees > [add item], entering one of the new item numbers and pressing the tab key on your keyboard.

## Adding New Patients

If you use a Medical Director 3 database or will be upgrading from Medical Director 2 to Medical Director 3, patients will be available in PracSoft via the Medical Director 3 upgraded database. Also, you can add new patients;

1. Select **Patient > New Patient**.

**Add New Patient**

Title: First name: Surname: Known as: Date of birth: Sex:

Status: Active Chart type: Permanent ATSI: Medicare No: Expiry date:

Regular practitioner: Chart No: Allocate Chart No

**Payment Details** Address/Phone Personal Details Notes

Payer details: Payer: Self Other

Other payment information: Concessions: None DVA file No: Entitlement No: HCC expiry date: Insurance: None

Auto capitalise Waiting Room Save Print Cancel

2. Enter the patient's information. Either click **Save** to save and close the window, or click **Wait Room** to save, and add the patient to the Waiting Room. If the Referral Details window appears, complete any referral information for the patient. *This prompt can be disabled via Setup > Global Settings > Patient tab.*

## Adding Institutional Payers

1. Select **Admin > Institutional Payers**.
2. Click **Add**. The **Institutional Payer Details** window appears.

**Institutional Payer Details**

**Company**

Code:  Name:

Default fee column:

**Representative**

Name:  Phone:  Fax:

Email:

**Address**

Line 1:

Line 2:

Line 3:

Suburb:  State:  Postcode:

Notes:

Marked inactive

Auto capitalise

3. Enter details as necessary, including a code to identify this Institution from others.
4. In the 'Default Fee' column select the fee rate for this Institution. If it is a new fee rate, you must set up this fee rate.

## Appointments

### Adding a New Appointment Book

A default Appointment Book is provided. Creating further Books should be considered carefully, as once created, they *cannot be deleted*.

To create or add an Appointment Book:

1. Select **Wait Room > Appointments** to open the PracSoft Appointments module.
2. Within the Appointments module, select **Setup > Manage Appointment Books**.
3. Click **Add**.
4. Enter a Description (name) for the new Book and click **OK**. You will be prompted to confirm this.

## Adding an Appointment

The following steps describe how to schedule a basic appointment. Information about creating appointments for non-patients, multiple patients, recurring appointments and more is available within PracSoft Help.

1. Select **Wait Room > Appointments** to open the PracSoft Appointments module.
2. Select the Appointment Book you wish to use via the drop-down list at the top-right of the window.
3. Similarly, select the Practitioner you wish to schedule an appointment for.
4. Click a time slot for the appointment.
5. Type the patient's surname, comma, first name (or part of), or first name and surname without commas.
6. Press **Enter**. If there are multiple matching patients a list appears to select from. You may be prompted if the patient has an outstanding account.

## Fees

PracSoft supports standard fee columns (Medicare Benefits Schedule and Medicare Rebate) and up to 14 user-defined fee columns to cater for fees on a per-Practitioner and per-Institution basis.

PracSoft comes supplied with a Standard Fee list of over 100 common items, which can include item numbers with alpha characters (e.g. 'Hep B') for use with items that are not in the Medicare Benefits Schedule.

To setup your PracSoft fees select **Admin > Fees** to reveal the **Fee Listing** window. To find a specific item number, click **Find**. Enter an item number and click **OK**.

**Fee Column Details**

Column name:

Fee name:

Billing code:

The formula can refer to any column name (other than itself) and/or numeric values. It can use +, -, \* or /  
 eg. [Rebate85] + 5 (\$5 above the rebate)  
 eg. [SchedFee] \* 1.15 (15% above schedule fee)

Formula:

Rounding type:

Rounding value:

Display order:  numeric value between 1 and 20

Column names

- [SchedFee]
- [Rebate85]
- [Rebate75]
- [AMAfee]
- [VetFee]
- [VetLMO]
- [User 1]
- [User 2]
- ...
- [User 12]
- [User 13]
- [User 14]

Save Cancel

To modify the layout of the screen, hide columns, and rearrange the order in which the columns are shown, select **View > Choose Columns**. Then, select which columns to display by checking the associated check boxes.

## Managing Fees

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To setup or edit customised fees:

1. Select **Setup > Fee Columns**. The **Fee Column Configuration** window appears.
2. Select an available column from the list and click **Edit Column**.
3. Enter a Fee Name and Billing Code. Typically the Code is an abbreviation of the Name.
4. (Optional) Specify a Formula and Rounding value.
5. A column name in a formula must be typed exactly as it appears in the reference list and must be enclosed in square brackets (for example for a column value you wish to be \$5 above the Schedule Fee, type [SchedFee]+5). The mathematical operators +, -, \* and / are supported.
6. Select for the Rounding options as appropriate from the drop-down lists supplied (for example 'Rounding Type' and 'Rounding Value').
7. Enter the Display Order. This field affects the order in which this fee column is displayed in PracSoft.
8. Click **Save** to save these details.

### Notes about Fees:

**Formula:** Sophisticated formulas are recognised and all standard SQL functions are supported. If you require a complex formula, help may be found on PracSoft's User Forum, where advanced users may provide you with assistance. The PracSoft user forum is accessible via the HCN web site.

**Recalculation:** When a row representing a User-Defined fee column is selected in the Fee Column Configuration window, the Recalculate button is enabled. If you have entered a formula, or the standard fee columns have changed because of an update, click this button to recalculate each fee column. If you have entered an inappropriate formula, clicking Recalculate displays an error message. Click OK in response, and rectify the formula. No fee amounts are altered if a formula is incorrect.

**Obsolete Fee Columns:** If you have a user-defined fee column that is no longer used, change the name of the fee column back to 'Unused' or another name not referenced by the system.

## Applying Fees to Practitioners

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1. To nominate the fee columns that apply to the various patient concession levels for each practitioner, select **Admin > Practitioners**. The **Registered Practitioners** window appears.
2. Select a Practitioner and click **Edit**. The **Practitioner Details** window appears. To the right of this window are the options/values relating to Billing.
3. Select the appropriate values from the drop-down lists provided.
4. Click **OK** to save the information.

## Applying Fees to Institutions

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

1. Select **Admin > Institutional Payers**.
2. Select a payer and click **Edit**.
3. Select the appropriate fee for the institution via the **Default Fee Column** drop-down list.
4. Click **Save** to confirm.

## Patients and the Waiting Room

To add a patient to the Waiting Room list:

1. Either press **F3**, or select **Wait Room > Add to Waiting Room**.
2. Enter the patient's Surname, Medicare Number or Chart Number in the text box at the top of this window. As you type, a list of patients appears in the lower section of this window, generated dynamically.
  - o If you are searching for a patient based on Medicare Number, you must enter the full number before the list is populated.
3. Double-click the patient record to add them to the Waiting Room list.

## Issuing a Private Account

The following is an overview of recording a visit and issuing a Private Account (where the patient takes the invoice with them). Detailed information about recording visits for these and other types of accounts is available in PracSoft Help.

Although there are a number of ways in which to begin recording a visit, the following procedure assumes a patient has been added to PracSoft's Waiting Room.

1. In the Waiting Room select the patient you wish to record a visit for, and then click **Visit** at the bottom of the window. The Record Visit window appears.
2. Select 'Patient' from the **Invoice To** drop-down list. The patient's Payer details appear. If the practitioner entered Item Number(s) during the consultation, these automatically populate the **Item No** and **Description** columns along with the fees related information. The default item number for a given Practitioner appears automatically if you have configured this in PracSoft.
3. Add, remove, or modify the services listed as appropriate. For detailed information see **Issuing Accounts/Receipts - Private Accounts** in PracSoft Help.
4. Select a payment option (Pay Now/Later).
5. Process the account as follows;
  - o To put the account on hold, click **Hold**. This option is available only if you elected to Pay Later, in Step 4.
  - o To send the patient an account notification at a later date, click the **Account** button. If you have the **Print Preview** check box selected, a print preview is shown before printing. This option is available only if you elected to Pay Later, in Step 4.
  - o To issue a receipt for the account click **Receipt**. This option is available only if you elected to Pay Now, in Step 4.

## Issuing a Bulk Bill Account

Follow this procedure if you need to print a Medicare voucher for Bulk Bill patients At the 'Record Visit' window, proceed as follows:

1. In the Waiting Room select the patient to record a visit for, and click **Visit**.
2. Select 'Bulk Bill' or 'Vet Affairs' from the '**Invoice To**' drop-down list.
3. Add/Remove items via the add/delete buttons. The 'Print Voucher' check box should be selected.
4. Click **Voucher** (or **Claim** for Medicare Easyclaim). A voucher is printed, or your claim is processed immediately (via Medicare Easyclaim).

If your surgery is setup to transmit claims to Medicare Australia Online Claiming, the voucher details are now waiting to be batched in the next claim (refer to **Batching Bulk Claims** in the PracSoft Help).



## What Next?

### Setup SMS Reminders

The SMS Reminders module allows users to send SMS messages to mobile phones from within PracSoft. Upon opening PracSoft for the first time, any top-level user will be prompted to setup and register for SMS Reminders. PracSoft uses a third-party SMS service to send SMS messages.

### Medicare Easyclaim

Medicare Easyclaim is a system that allows patients to claim Medicare rebates whilst they are at your surgery. You can process Patient Claiming and Bulk Bill via Medicare Easyclaim using HCN's Integrated EFTPOS facility, known as EFTPOS Auto. Detailed information on Medicare Easyclaim can be found within the PracSoft Help and via the Medicare Australia Easyclaim web site at [www.medicareaustralia.gov.au/public/claims/easyclaim.jsp](http://www.medicareaustralia.gov.au/public/claims/easyclaim.jsp)

Please note to take advantage of Medicare Easyclaim functionality you will require an EFTPOS terminal from TYRO. Please contact PracSoft Sales on 1300 300 161 (opt 1).

### Integrated EFTPOS

1. Select **Setup > EFTPOS/Medicare Easyclaim > Terminal Configuration**.
2. Click **Add Connection**.
3. Enter your Merchant ID, Terminal ID and Terminal Name. Click **Connect** to establish a connection with your terminal.
4. Select **Setup > Bank Accounts**.
5. Double-click the practitioner who will be using EFTPOS and enter their Merchant ID.

Detailed information about Integrated EFTPOS is available from the PracSoft Help.



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