



Getting Started with PracSoft

The **Getting Started with PracSoft** guide is intended to assist you in quickly becoming familiar with PracSoft's core functionality; the basic features of PracSoft that you will use every day.

This guide can be used in conjunction with other educational and informative materials provided by HCN, including online webinars, Knowledge Base articles, and classroom-based training, available from the 'Support & Downloads' and 'Training' menus on the HCN web site at www.hcn.com.au. Furthermore, the information contained herein is an extract of the comprehensive PracSoft Online Help, available at any time by pressing F1 from within PracSoft.

It is important to note before exploring this guide, that you have already configured PracSoft for first-time use. Consult the **PracSoft Set-up Guide**, available from www.hcn.com.au/kb. Should you require further assistance relating to your PracSoft software, please contact HCN Customer Support on 1300 788 802 or log a call online via www.hcn.com.au/inquiry.


What This Guide Covers

- How to create new patient records, including how to record families.
- How to create an Appointment Book, and then how to populate it with your practitioners from PracSoft.
- How to schedule an appointment for a patient.
- How to add patients to PracSoft's Waiting Room (an on-screen representation of your Practice's waiting room).
- How to record a visit (issue an account).
- How to batch and send bulk claims to Medicare / Veterans' Affairs.

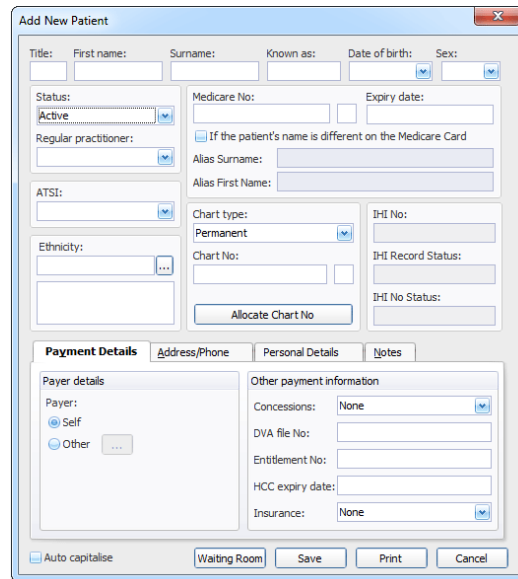
Adding Patient Records

If you run PracSoft in conjunction with Medical Director, add new patients via PracSoft **only**; patients added this way are transferred to Medical Director automatically.

Adding New Patient Records

1. Either click the Add New Patient button  or press F6.
2. The **Add New Patient** window appears.
3. Enter the patient's information, ensuring to include their Medicare/DVA number if available. If you discount or bulk bill pensioners or health card holders ensure you select their concession type.
4. Click the **Save** button to confirm the information and close the window. When you click the Save button, you are presented with the Referral Details window. You may enter any referral information applicable to the patient concerned if desired.

It is recommended that you now validate their IHI Number. Press **F2** to search for the patient you just created, select them and click **OK**. Their details window is presented. Locate and click the **Validate** button.




Adding Family Records

A 'family' consists of a group of two or more patients, where one patient is designated the payer for all in the group.

1. Create the 'payer' patient record first (follow the steps above for 'Adding New Patient Records').
2. When adding subsequent family members, enter their **First Name** and **Surname** into the Add New Patient window.
3. On this same window, locate the **Payer Details** section and select '**Other**'.
4. The **Select Payer for [patient name]** window appears, pre-populated with patients with the same surname.
5. Locate and select the patient who will act as the 'payer'. You are not restricted to select from the list of patients with the same surname; you can search for any other patient you desire. Click the **OK** button to confirm.
6. You are returned to the **Add New Patient** window, now populated with the demographic details of the payer.

Scheduling Appointments

1. Open the Appointment module by clicking the  button.
2. If you have multiple Appointment Books, select one via the associated drop-down list at the top of the window.
3. Select the practitioner for whom you wish to assign an appointment, using the associated drop-down list.
4. Click a time slot in the date/time matrix. The insert point appears within the time slot, ready for you to begin typing a patient's name. Alternatively, click and drag across multiple time slots, to schedule longer appointments.
5. Enter the patient's name in the format of '**Andrews, John**' or '**John Andrews**'. Press **ENTER** to confirm.
 - If there is more than one matching patient, the **Select Patient** appears for you to select from.
 - If this is a new patient, the **Select Patient** window appears. Click the **New** button. This creates a new appointment for the patient even though you don't have a record for them in the PracSoft database. Later you can create a record for them, and then link their Appointment Book entry to the new record.
6. Click the **OK** button. The patient's appointment has been scheduled. You can indicate the type of appointment by right-clicking the appointment entry and selecting **Type** from the menu that appears.



Adding Patients to the Waiting Room

The Waiting Room is where you track the movements of patients in your actual waiting room at your Practice.

1. From the tabs available along the top of the Waiting Room window, indicate which practitioner you wish to assign the patient to; the default is 'All'. A practitioner's designated tab is represented by their User ID. By selecting a *specific* practitioner's tab, the patient will be assigned to that practitioner regardless of the patient's *default* practitioner. If the 'All' tab is selected, the patient will be assigned to their default practitioner.
2. To add a patient to the Waiting Room, press **F3**.
3. 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. When searching for a patient by Medicare Number, you must enter the full number before the list is populated.
4. Double-click the patient record to add them to the Waiting Room list. If you wish to perform an Online Patient/Veteran Verification check, select the patient and click the OPV/OCV Check button (only available if you are using online claiming).

Recording Visits (Issuing Accounts)

The following procedure describes the steps necessary for billing a *bulk bill* account. You can also bill to other types of accounts such as Private and Institutional accounts, and you can bill to multiple patients for example. See 'Recording Visits' in the PracSoft Help (press F1) for detailed information about issuing accounts.

1. Within the Waiting Room, select the patient's record, and press F5. The **Record Visit** window appears.

2. If necessary;
 - Select the consulting practitioner from the **Seen by** drop-down menu.
 - Select the referring practitioner (if required) via the **Referral** button at the bottom of this window.
 - Indicate the location at which the consultation took place from the Location drop-down menu.
 - Modify the Consult Time/Date if required. This refers to the recording of the visit, not the consultation time.
3. As you are issuing a Bulk Bill account, select **Bulk Bill** from the **Invoice To** drop-down list.
4. Add and/or modify Service Item details;
 - A list of Service Items is available via **File > Search Std Item List** (or press Ctrl+S).
 - Add service item text via the Text column for each item, if desired.
 - A maximum of 14 Service Items (including Incentive Items) may be billed simultaneously. If you need to record further items, you must initiate another visit for the patient.



5. (Optional) Tick the **In Hospital** check box to indicate that the service was conducted in-hospital. Upon ticking this box a new drop-down list becomes available where you must select the Provider No (Facility ID).
6. Indicate whether the patient is removed from the Waiting Room, via the associated check box.
7. Indicate whether you want to print a voucher via the Print Voucher check box. You might disable this if for example you need to edit the voucher, or perhaps you have printed them a voucher already (on a blank DB4) and are now billing the patient. Specify how many copies you wish to print.
8. Click the **Voucher** button to initiate the claim. If you have enabled Online Patient Verification (OPV), and the patient in question has not had their Medicare card details recorded, you will be prompted to enter their details now. If you have their Medicare card handy, swipe it now to automatically enter their card number.

Batching Bulk Claims for Medicare / Veterans' Affairs

After recording a visit / issuing an account to Bulk Bill or Vet Affairs, you must batch all the claim vouchers before they can be sent to Medicare Australia / Vet Affairs for processing. The following information explains the process of batching claims for both Bulk Bill and Vet Affairs claims.

1. Select **Processing > Batch Bulk Claims > Medicare** (or Veterans Affairs)
2. The **Batch Bulk Claims** window appears.
 - PracSoft calculates the number of claims required for vouchers that are not already batched.
 - Details of individual claims are shown on the right-hand side of the window.
 - Summary details are on the left-hand side. If there are multiple batches available, you can view them by clicking the forward(right) or backward(left) arrow button, or by pressing the PAGE-UP or PAGE-DOWN keys on your keyboard to scroll through the list.
 - Each batch must have a claim number. Enable auto-claim number generation to ensure you do not accidentally use the same batch number twice (Setup > Global Settings).
 - Any in-hospital vouchers are automatically batched into a separate claim prefixed with #, for example #1234.
 - Check that the vouchers for each batch match up with PracSoft's details of the vouchers. To display a list of the un-batched vouchers proposed for that claim press ALT+S. If you discover errors in a claim, you must close the Bulk Claim Details and Batching Bulk Claims windows, and edit the voucher before you can proceed with batching.
3. Click the **Process** button to process the batch. You will be prompted to confirm this action. Upon successfully processing a batch, the Batching Bulk Claims window will indicate that the batch has been processed, and the Process button will no longer be available for this batch.
4. Use the forward(right) or backward(left) buttons to scroll through the remaining batches, and process them as desired.
5. Once you have completed processing batches, you can either;
 - Click the **Send** button to send the batch now, or
 - Click the **Close** button to save the processed batches, for sending in bulk at a later time.



Sending Bulk Claims to Medicare / Veterans' Affairs

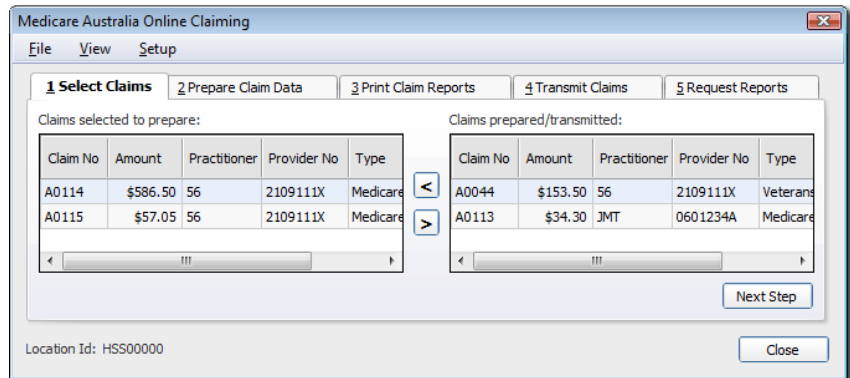
There are 5 steps to sending claims to Medicare Australia Online.

Step 1 - Selecting Claims

1. From the PracSoft Waiting Room, select **Processing > Online Claiming**. The Medicare Australia Online Claiming widow appears.

The left-hand side displays claims that have been batched but *not* prepared/transmitted. The right-hand side displays claims that *have* been prepared/transmitted. Move claims from side-to-side by double-clicking them.

2. Once you have placed the claims you wish to prepare into the 'Claims Selected to Prepare' section, click the **Next Step** button. The Prepare Claim Data tab will be displayed. Go to Step 2 - Preparing Claim Data for Transmission.



Step 2 - Preparing Claim Data for Transmission

The Prepare Claim Data tab displays claims that you have selected to prepare. If necessary you can edit a voucher here before you process it.

1. Click the **Prepare** button to begin preparing vouchers.
2. You will be prompted to double-check that the correct claims have been selected for processing.
 - If you are using a location certificate only and the Practitioner for whom you are preparing the claim on behalf of does not use an individual token, the claim will process once you respond with 'Yes'.
 - If you are preparing claims for a Practitioner who uses an individual token, the Practitioner must insert the Individual Token or iKey and type in the password for each Practitioner when prompted.
 - If a claim has been prepared successfully you will be notified in this window.
 - Any issues discovered are displayed in this window.
 - If a claim has failed preparation, take note of the reasons displayed and then click the Edit button to call an edit window in which you can make the appropriate changes. Once any errors with the claim are rectified, proceed to the Medicare Australia Online Claiming window via Processing > Online Claiming and attempt to process the claim(s) again. The procedure for rectifying issues with immunisations claims is different.
3. Once all claims have processed successfully click the **Next Step** button. The **Print Claim Reports** tab will be displayed. Go to Step 3 - Printing Claim Reports.

Step 3 - Printing Claim Reports

Here you can print claim reports. No documents are required to be sent to Medicare Australia for Medicare and DVA claims. However, you may wish to print Medicare Australia Online Claiming claims for your own records. Click the **Next Step** button to continue. The Transmit Claims tab will be displayed. Go to Step 4 - Transmitting Claims.



Step 4 - Transmitting Claims

1. Click the **Transmit** button to transmit the claims. The **Transmit Claims** window appears.
 - One or more claims can be transmitted to Medicare Australia using an Internet connection.
 - The transmission of claims does not need to be performed at the same time as the claims are prepared. These processes are separate. It is recommended that you transmit prepared claims so that in Step 1 you can accurately distinguish between sent and unsent claims (refer to Step 1 - Selecting Claims for clarification).
 - All claims prepared but not transmitted should have a tick in the box next to the claim number. If you decide at this stage that you do not wish to send one of these claims simply remove the tick from the box and transmit at a later time.
 - The Cancel button allows you to close this window without transmitting any claims. You can then return to this step at a later time (without preparing these claims again) to recommence the transmission.
2. When you are sure you wish to transmit the selected claims click the **Transmit** button. A message appears in both the main window and the hiconline.log to indicate the success or failure of the transmission. At this stage you have completed the steps necessary for sending bulk claims to Medicare Australia Online. You need only proceed to Step 5 - Requesting Medicare Australia Online Reports if you wish to request Processing Reports (for resolving exceptions) or Payment Reports from Medicare.

Step 5 - Requesting Medicare Australia Online Reports

You can send a request to Medicare to return processing and payment reports, which help you to resolve exceptions. Click the **Request** button to request claim reports from Medicare Australia Online Claiming.

- Any claims that have exceptions will have reports printed and must be resolved before the claim can be receipted.
- Payment reports are printed for the relevant claims and any claims that have been paid by Medicare Australia Online Claiming are automatically receipted off in your PracSoft accounts.
- All Report output can also be found in the View Payment/Processing.
- Payment reports will not be requested at this stage for claims that have not had their exceptions resolved.

Medicare Easyclaim and Integrated EFTPOS

You can process Patient Claiming and Bulk Bill via Medicare Easyclaim using HCN's Integrated EFTPOS facility, known as EFTPOS Auto. See 'Online Claiming' within the PracSoft Help (press F1). Information is also available via the Medicare Australia Easyclaim web site at www.medicareaustralia.gov.au/public/claims/easyclaim.jsp

To take advantage of Medicare Easyclaim functionality you will require an EFTPOS terminal from TYRO. Please contact Sales on 1300 300 161 (opt 1). See 'Integrated EFTPOS - About and Usage' in the PracSoft Online Help (press F1).

For more information consult the Knowledge Base Article 'Easyclaim and Online Claiming with PracSoft', available from www.hcn.com.au/kb

Keyboard Shortcuts - PracSoft

Appointments	
Key	Action
CTRL + F	Blood Test Fasting
CTRL + O	Ordinary Appointment
CTRL + L	Blood Pressure
CTRL + H	Home Visit
CTRL + M	Pap Test
CTRL + X	Custom Type "X"
CTRL + Y	Custom Type "Y"
CTRL + Z	Custom Type "Z"
CTRL + P	Procedures
CTRL + V	Vaccination
CTRL + B	Obstetrics
CTRL + T	Blood Test
CTRL + U	Acupuncture
CTRL + E	Emergency
CTRL + D	Dressing
CTRL + S	Script

Appointment Book	
Key	Action
F11	Next Day
F12	Next Week
F8	Next 4 Weeks
F9	Today's Date
F2	Find A Patient's Appointment
CTRL + W	Add Patient To Waiting Room
CTRL + I	Open Patient In Medical Director
SHIFT+DEL	Delete Range Of Appointments (In One Column)
SHIFT+INSERT	Paste
CTRL+ENTER	Creates A Non-Patient Booking.
CTRL + G	Gone
CTRL + A	Add A "Fit In" Appointment
CTRL+INSERT	Cut

General	
Key	Action
F1	Help
F6	Add New Patient
CTRL + L	Log Off
CTRL + R	Refresh

Recording Visits	
Key	Action
F12	Display Receipt Information
CTRL + S	Search For Item Number
CTRL + N	Add Visit For Same Patient
ALT + S	Save, No Print
ALT + P	Print Receipt

Waiting Room	
Key	Action
F2	Find A Patient
F3	Add Patient To Waiting Room
F5	Record A Visit
F7	View Patient Details

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