Bp Premier

Bp Management FAQ's

Question	Answer
How do I reset my password?	Setup>Users – (not all users have access to this function)
How do I use the 'Cancellation List'	Must first book an appointment to go on Cancellation List. Tick to add to cancellation list when making appt. Then when cancelling an appt, user will be prompted to select a pt from cancellation list. To View the Waiting List for cancellations (Appt Book>Ctrl F11)
How do I send immunisations to ACIR/AIR?	Main screen>Utilities>VIVAS/ACIR Select **Send to AIR** button To see all sent vaccinations from this screen: Select **View>Sent Vaccinations**
Can I bill patient by 2 different methods on the one account?	No – create account twice and do Bulk Billing account first (if applicable)
If cancelling an account, what do I do first?	**Reverse** payment first, then **Cancel** invoice Note: if payment has been banked it cannot be reversed.
How can I check to see if **patient claiming** (Private Billing) was successful?	Management>Patient Claiming Check Status column for any REJECTED Claims – Note: Can only delete claims on the day of transmission.
Is it possible to see the duration of a consult on the appt book or waiting room screen while the patient is in with the doctor?	Not easily. However it is possible to see the duration from the Billing Screen when creating the account.
For children, what age should I stop using Bill to 'Head of Family'	Use for children up to age 17 (even though children can have Medicare Card from Age 15)
Adjustments	Can make an adjustment to both an Invoice and a Payment Open patient>Billing History>Select Invoice>Adjust Open patient>Billing History>Select Payment>Adjust **Note:** Adjustments are highlighted in PINK on Billing History screen
How do I mark and report on a patient 'No Show' in the Appointment Book?	Highlight Appointment, select 'Did Not Attend' icon at bottom of appt book screen. To view list: go to View > Uncompleted Appointments
Who can cancel a recall appointment?	Only users with a User Category of Practice Manager, Principal doctor or Senior Receptionist
How do I use SMS appointment reminders?	Record consent and mobile phone details in patient record. Single patient SMS : From patient appointment: select appointment > utilities > Send SMS. Bulk patient SMS: Appt Book > Utilities > Send SMS reminder (follow prompts to select parameters and press SEND.
What do the colours mean on the Appointment book?	Indicate appointment status - can also be used to highlight blank appts for particular clinicians.

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How do I change a fee on an account?	**If unpaid**: Billing>Account History>Adjust>Double click on invoice amount and edit. **If paid**: Need to adjust payment first. Can only adjust payment if unbanked.
How do I add service text to an account?	Edit the Service Details field on the item (use free text or drop down)
How do I book a slot for a non-patient appointment? E.g. meeting	Select an Appointment type of 'Other', Meeting, teleconference or Internet.
Can I book an appointment for a patient in an 'Unavailable' appointment slot?	Yes, but you will be asked to confirm.
How do I enter a new patient appointment?	Select cell in appt book, start typing patient name If patient not found, check 'inactive patients' tickbox If patient still not found, press 'New Patient' button Enter name and mobile number, and select New patient as the appointment type. SAVE.
Can I see patient Billing History from the main screen?	Yes, select Management>Patient Billing History>Select patient
How do I allocate a payment?	Management>Process Payment (for existing accounts)
How do I add/record a deposit?	From Patient screen: Patient Billing History File>Record Deposit, add details and Save. Tick 'Show Payments / Deposits' To pay an invoice using a deposit, pay in the usual way and tick 'use Deposit' Can also refund full or part of a deposit: Billing History>Tick Show Payments/Deposits>Highlight Deposit>Choose Refund button>Select Type and amount and choose Refund button. Note: Shows up in Green Highlight in Billing History screen.
Can I adjust an invoice without affecting a payment?	No, you must first reverse the payment and then adjust the invoice. However bulk billed accounts cant be adjusted in this way and if the payment has been banked it cannot be reversed.
How do I add an Account Holder?	Main Screen>View>Account Holders>Add New
How do I modify appointment times for a practitioner	Setup>Sessions>choose practitioner and modify schedule Don't modify the defaults appointments. Access the individual doctors profile and change their regular schedule.
How to send an internal message	F8 > New>Select recipient/s or group/s. Type the message, Link to patient (if required)>Send.

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Messages – How to link a message to a patient file?	Create message and select patient (Link to patient button) or from within a patient file (tick 'use current patient' tickbox).
How to see all patient specific messages	Patient screen>Utilities>Patient Messages
How do I find the list of past and future appointments for a patient?	Appt Book>File>Find appt>Search for patient>highlight patient in list (top of screen) All appointments will display in bottom of screen. Highlight and choose 'Go To' to view a particular appt of Move to change appt time.
How do I find the next available appointment for a doctor?	Appointment Book>Next Appointment button>Select provider name/time from list & either book or 'Jump To' to view that days appts.
Held Accounts - under what circumstances would I use the 'Hold' function when creating an account?	If unsure of the correct item number to bill at the time of consultation OR if the patient is a newborn and Medicare number is unknown. The Account can be finalised from the Billing History window when details are known.