



Train IT **Medical**
Leading Your Practice Into The Digital Future



Pracsoft

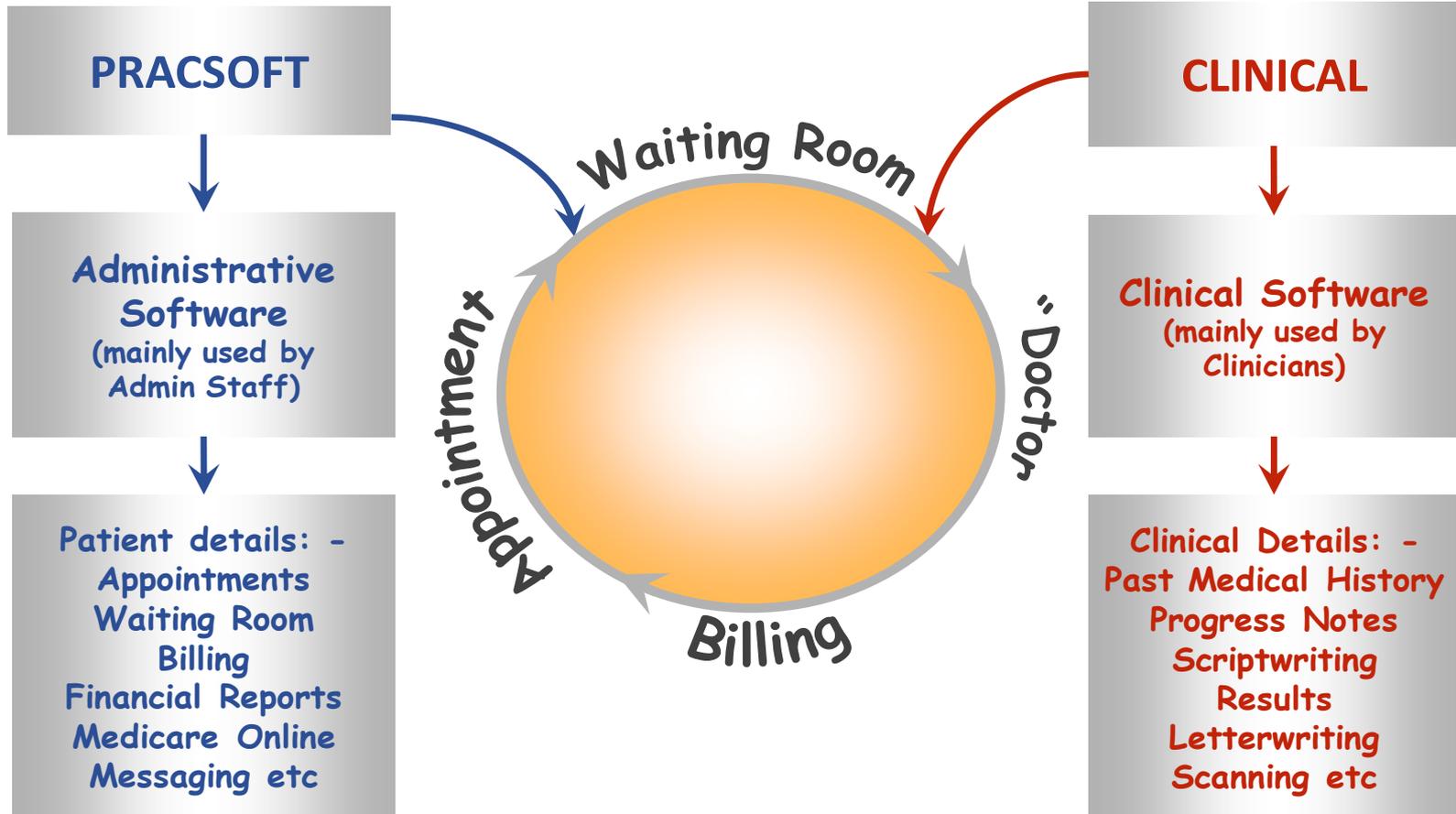
(for new Receptionists)

Presented by Katrina Otto
Train IT Medical Pty Ltd
www.trainitmedical.com.au
katrina@trainitmedical.com.au



Learning Objectives:

1. Make an appointment
2. Enter and update patient details
3. Develop an understanding of bulk billing & online claiming processes (including resolving exceptions)
4. Use features related to private billing (including Institutional Billing)
5. Generate reports



Common Patient Workflow

1. Receptionist books 'New Appointment'
2. Receptionist shows patient as 'Waiting'
3. Clinician opens patient record in Clinical directly from Pracsoft Appointment book or Waiting Room.
4. Clinician enters item number directly from Clinical (progress notes) or Pracsoft Waiting Room
5. Receptionist 'Records Visit' in Pracsoft to bill.



Appointment Book

Time	AP - Surgery [Dr A Practitioner]	IF - Surgery [Dr I Feelgood]
7:30 AM		
:45		
8:00 AM		
:15		
:30	ANDERSON,David (David), 0424 555 555	
:45		
9:00 AM		
:15		
:30		
:45		
10:00 AM		
:15		
:30		
:45		
▶ 11:00 AM		
:15		
:30		
:45		

Verify Patient Details

Add New Patient [Close]

Single Name

Title: First name: Middle name: Surname: Known as: Date of birth: Gender: Transgender:

Status: Active [Dropdown]
Regular practitioner: [Dropdown]
ATSI: [Dropdown]
Ethnicity: [Dropdown] [More]

Medicare No: [Text] Expiry date: [Text] Medicare Gender: [Dropdown]
 If the patient's name is different on the Medicare Card
Alias Surname: [Text]
Alias First Name: [Text]

Chart type: Permanent [Dropdown]
Chart No: [Text] [More]
[Allocate Chart No]

IHI No: [Text]
IHI Record Status: [Text]
IHI No Status: [Text]

Payment Details | Address/Phone | Personal Details | Notes

Payer details
Payer:
 Self
 Other [More]

Other payment information
Concessions: None [Dropdown]
DVA file No: [Text]
Entitlement No: [Text]
HCC expiry date: [Text]
Insurance: None [Dropdown]

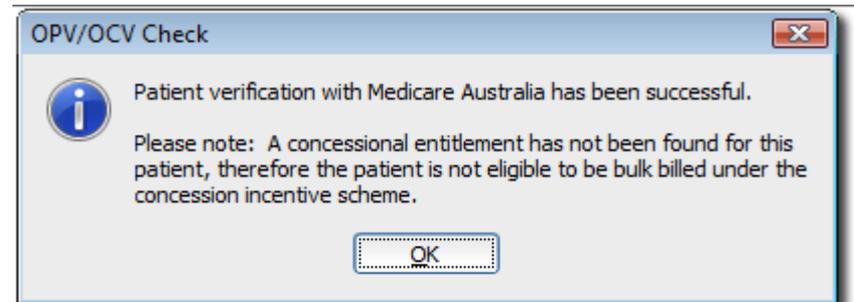
Auto capitalise

[Waiting Room] [Save] [Print] [Cancel]

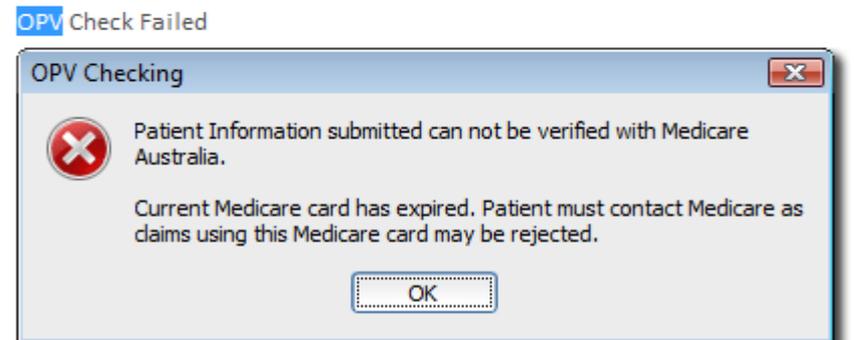
Online Patient Verification

Online real-time checking

1. Successful verification:



2. Failed verification:



Online Patient Verification

Medicare Card or Patient Details require updating

Change Medicare Card Details

The individual has been matched using the submitted data however differences were identified. Please check the information returned and update your records.

Medicare Australia has provided the following details for this Patient:

Medicare Number changed from 5500797581 to 5500797582

Patient First name recorded at Medicare Australia is DUKE-DOUG which is different from DUKE

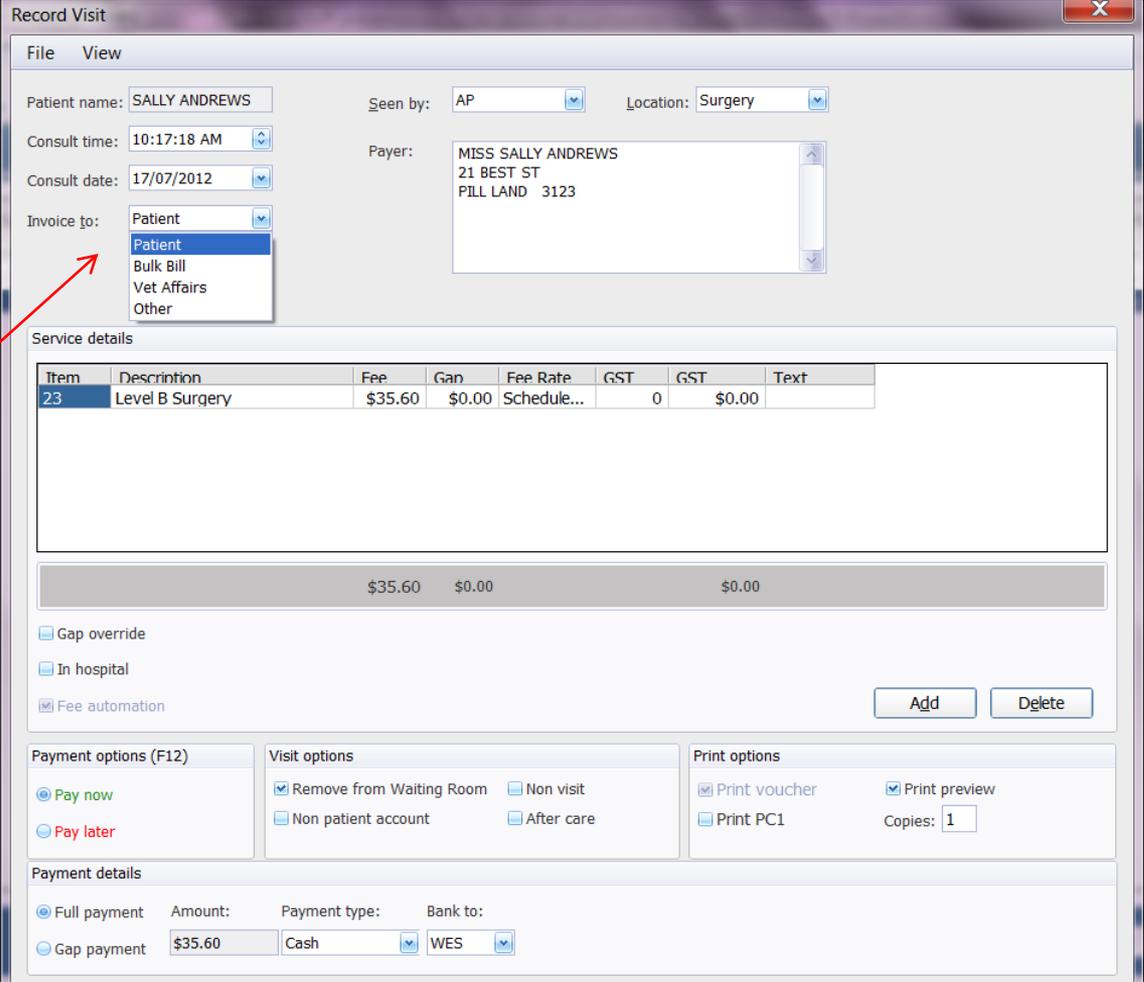
Do you wish to update the Patient record ?

Yes

No

Billing Processes

You can change from private (patient) billing to bulk billing or Vet Affairs or Other (Institution) by clicking the **Invoice To:** box and making your selection.



Record Visit

File View

Patient name: SALLY ANDREWS Seen by: AP Location: Surgery

Consult time: 10:17:18 AM Payer: MISS SALLY ANDREWS
21 BEST ST
PILL LAND 3123

Consult date: 17/07/2012

Invoice to: Patient (dropdown menu open)

Service details

Item	Description	Fee	Gap	Fee Rate	GST	GST	Text
23	Level B Surgery	\$35.60	\$0.00	Schedule...	0	\$0.00	

\$35.60 \$0.00 \$0.00

Gap override
 In hospital
 Fee automation

Add Delete

Payment options (F12):
 Pay now
 Pay later

Visit options:
 Remove from Waiting Room Non visit
 Non patient account After care

Print options:
 Print voucher Print preview
 Print PC1 Copies: 1

Payment details:
 Full payment Amount: Payment type: Bank to:
 Gap payment \$35.60 Cash WES

Online Claiming – Bulk Billing

Step One:

1. Batch vouchers into a new claim
2. Select practitioner & 'create batch'
3. Send to Medicare Online

Step Two:

1. Request reports
2. Resolve exceptions

Step 1: Select claims to send

Step 1 - Selecting Claims

1. From the MedicalDirector Pracsoft [Waiting Room](#), select Processing > Online Claiming. The Medicare Australia Online Claiming widow appears.

Medicare Australia Online Claiming / Easyclaim Reconciliation

File View Setup

1 Select Claims 2 Prepare Claim Data 3 Print Claim Reports 4 Transmit Claims 5 Request Reports

Claims selected to prepare:

Claim No	Amount	Practitioner	Provider No	Type	Status	Date Lodged
A0061	\$101.95	AL	2406901F	Medicare	New	
A0063	\$278.30	AP	0385238Y	Medicare	New	
A0066	\$43.20	VLN	23434343	Medicare	New	
B0022	\$40.95	GP	2525213W	Veterans	New	
B0029	\$310.95	NP1	2406901F	Veterans	New	
B0030	\$42.65	JMT	4513946K	Veterans	New	
B0031	\$118.75	GP	2525213W	Veterans	New	
B0032	\$524.80	AP	0385238Y	Veterans	New	

Claims prepared/transmitted:

Claim No	Amount	Practitioner	Provider No	Type	Status	Date Lodged
A0082	\$144.25	AP	0385238Y	Medicare	Prep	
A0084	\$68.55	NP1	2406901F	Medicare	Prep	
A0087	\$10.45	GP	2406901F	Medicare	Prep	
B0018	\$20.00	AL	2406901F	Veterans	Prep	
B0020	\$36.00	GP	2146681K	Veterans	Prep	
B0024	\$36.30	AP	0385238Y	Veterans	Prep	
B0026	\$104.10	GP	2406901F	Veterans	Trans	25/08/2016 11:
B0027	\$63.00	JMT	4513946K	Veterans	Trans	23/09/2016 10:

Location Id: HSS88888

Next Step

Close

Step 2: Prepare Claim Data

Step 2 - Preparing Claim Data for Transmission

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

Medicare Australia Online Claiming / Easyclaim Reconciliation

File View Setup

1 Select Claims **2 Prepare Claim Data** 3 Print Claim Reports 4 Transmit Claims 5 Request Reports

*** CLAIMS SELECTED TO PREPARE:A000060 A000064 A000065 A000066 A0014 A0016 A0018 A0020 A0021 A0024 A0026 A0043 A0061 A0063 A0066 A0071 A0072 A0075 A0078 A0079 A0083 B0019 B0022 B0029 B0030 B0031 B0032 ***|

Edit Prepare Next Step

Location Id: HSS88888 Close

Step 3: Print reports (optional)

Step 3 - Printing Claim Reports

Here you can print claim reports, which provide a summary of each claim including total number of vouchers and total amount claimed as well as details of all vouchers included in

Medicare Australia Online Claiming / Easyclaim Reconciliation

File View Setup

1 Select Claims 2 Prepare Claim Data **3 Print Claim Reports** 4 Transmit Claims 5 Request Reports

Processing:

```
*** CLAIMS SELECTED TO PRINT:A000060 A000064 A000065 A000066 A0014 A0016 A0018 A0020 A0021 A0024 A0026 A0043 A0061 A0063 A0066 A0071 A0072 A0075  
A0078 A0079 A0083 B0019 B0022 B0029 B0030 B0031 B0032 ***
```

Print Next Step

Location Id: HSS88888 Close

Step 4: Transmit, check for success

Step 4 - Transmitting Claims

Medicare Australia Online Claiming / Easyclaim Reconciliation

File View Setup

1 Select Claims 2 Prepare Claim Data 3 Print Claim Reports **4 Transmit Claims** 5 Request Reports

Processing:

```
*** START of TRANSMISSION at 1/12/2016 10:30:51 AM
Claim #0012 successfully transmitted at 1/12/2016 10:30:52 AM
*** END of TRANSMISSION - 1 claim(s) sent to Medicare Australia.
```

Location Id: HSS88888

Transmit Next Step Close

Transmit Claims

List of claims to transmit

Selected	Claim No	Claim Type	Practitioner	Provider No	Date	Amount
<input checked="" type="checkbox"/>	#0012	Medicare	AP	0385238Y	28/11/2016	\$37.05
<input checked="" type="checkbox"/>	A0056	Medicare	AL	2406901F	04/04/2014	\$36.30
<input checked="" type="checkbox"/>	A0060	Medicare	GP	2146681K	07/05/2014	\$326.92
<input checked="" type="checkbox"/>	A0068	Medicare	56	2406901F	23/05/2014	\$69.00
<input checked="" type="checkbox"/>	A0073	Medicare	GP	2525213W	24/07/2014	\$92.10
<input checked="" type="checkbox"/>	A0074	Medicare	NP1	2406901F	25/07/2014	\$37.05
<input checked="" type="checkbox"/>	A0076	Medicare	56	2406901F	05/08/2014	\$70.30
<input checked="" type="checkbox"/>	A0077	Medicare	AL	2406901F	11/08/2014	\$263.60

Select All Clear All Transmit Cancel

Step 5: Request Reports

Step 5 - Requesting Medicare Australia Online Reports

From the Request Reports tab of the Medicare Australia Online Claiming window you can send a request to Medicare to return processing and payment reports. These reports help you

The screenshot displays the 'Medicare Australia Online Claiming / Easyclaim Reconciliation' application window. The 'Request Reports' tab is active, showing a 'Processing:' status. The main area contains a log of operations:

```
Commencing to extract Online Claiming reports data from Medicare Australia
***** Starting to extract Processing report for A0047 at 1/12/2016 10:35:01 AM
Processing Report has not yet been processed by Medicare Australia. Please try again later
***** End of extracting Processing report for A0047 at 1/12/2016 10:35:01 AM
***** Starting to extract Processing report for A0048 at 1/12/2016 10:35:01 AM
Processing Report has not yet been processed by Medicare Australia. Please try again later
***** End of extracting Processing report for A0048 at 1/12/2016 10:35:02 AM
***** Starting to extract Processing report for A0049 at 1/12/2016 10:35:02 AM
Processing Report has not yet been processed by Medicare Australia. Please try again later
***** End of extracting Processing report for A0049 at 1/12/2016 10:35:02 AM
***** Starting to extract Payment report for A0047 at 1/12/2016 10:35:02 AM
***** End of extracting Payment report for A0047 at 1/12/2016 10:35:02 AM
***** Starting to extract Payment report for A0048 at 1/12/2016 10:35:02 AM
***** End of extracting Payment report for A0048 at 1/12/2016 10:35:02 AM
***** Starting to extract Payment report for A0049 at 1/12/2016 10:35:02 AM
***** End of extracting Payment report for A0049 at 1/12/2016 10:35:02 AM
Completed extraction of Online Claiming reports data from Medicare Australia
```

At the bottom of the window, there are buttons for 'Re-Request', 'Request', 'Resolve', and 'Status'. The 'Location Id: HSS88888' is displayed in the bottom left corner, and a 'Close' button is in the bottom right corner.

Select reports & filters eg date, not paid

Request Claim Reports from Medicare Australia

List of claims

Request	Claim No	Claim Type	Practitioner	Provider No	Date Auth	Amount
<input type="checkbox"/>	A0049	Medicare	GP2	2146681K	08/11/2016	\$28.00
<input type="checkbox"/>	A0054	Medicare	AP	0385238Y	08/11/2016	\$37.05
<input type="checkbox"/>	A0055	Medicare	AP	0385238Y	20/09/2016	\$37.05
<input type="checkbox"/>	A0058	Medicare	AP	2054781W	20/09/2016	\$43.20
<input type="checkbox"/>	A0062	Medicare	JMT	4513946K	08/11/2016	\$343.15
<input type="checkbox"/>	A0064	Medicare	AP	0385238Y	10/11/2016	\$620.10
<input type="checkbox"/>	A0067	Medicare	NP1	2406901F	28/11/2016	\$793.73
<input type="checkbox"/>	A0085	Medicare	DW	273874FH	25/08/2016	\$0.00
<input type="checkbox"/>	A0086	Medicare	NP1	2406901F	25/08/2016	\$37.05

Claim type:

Report type:

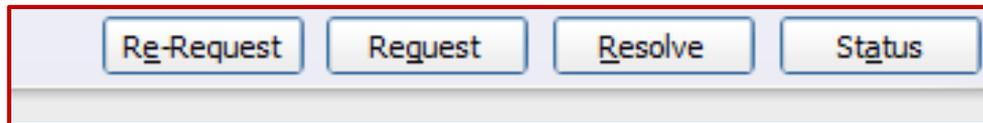
Date sent: To:

Print service items where Medicare benefit amount is:

- Fully paid
- Fully paid with Explanations
- Overpaid or Underpaid
- Not paid

Step 5: Request Reports

1. If there are any exceptions a **Processing** report will generate and the 'resolve' screen will appear.
2. If no exceptions a **Payment** report stating EFT and date paid will generate. This activates auto-receipting.



Claim No	Claim Type	Provider No	Benefit Assigned	Benefit Paid
A0012	DVA	2406901F	\$34.30	\$39.45
A0013	DVA	2406901F	\$39.75	\$45.75
A0031	DVA	2406901F	\$178.65	\$0.00

Resolving Exceptions

Resolving Claim Exceptions X

Claims to resolve

Claim No	Practitioner	Location	Claim Date	Date of Transmission
A0111	56	HCN	15/08/2011 12:34:31	15/08/2011 12:35:26

Exceptions to resolve

Name	Medicare No	Visit Date	Item No	Assigned	Paid	Reason Code
Harlor, Bren...	4134 83074 1	15/08/2011	00023	\$34.30	\$34.90	255
Harlor, Bren...	4134 83074 1	15/08/2011	10990	\$5.70	\$5.75	
Bruce, Stacy	2298 24955 1	15/08/2011	00023	\$34.30	\$34.90	255
Boyes, Simon	5500 39392 3	15/08/2011	00023	\$34.30	\$0.00	374

Patient Claiming – Private Billing

New Patient Claim

Refund method: EFTPOS card (card swipe required)
 Cheque
 EFT (bank account details required if not held by Medicare)

Bank account details

BSB number:
Bank account number:
Bank account name:
 Save banking details

Residential address details

Street:

Suburb:
State: Postcode:
Contact phone number:
 Use Medicare address

Patient claims can be sent directly at the time of processing (click the Transmit button) or grouped together and sent at a later time in one transmission (click the Store button).

Transmit will forward the claim directly to Medicare online. Same day deletion is available if necessary.

Integrated Easyclaims (Tyro)

Choose EFTPOS Auto when receipting

Record Visit

File View

Patient Name: DAVID ANDERSON Seen by Dr: AP Location: Surgery

Consult Time: 03:13:00

Consult Date: 05/11/2007

Invoice To: Patient Payer: MR DAVID ANDERSON
61 WALLACE ST
MELBOURNE VIC 3000

Service Details

Item No	Description	Fee	Gap	Fee Rate	GST Rate	GST Amount	Text
23	Level B Surgery	\$32.10	\$0.00	Schedule Fee	0	\$0.00	

Gap Override Fee Automation \$32.10 \$0.00 \$0.00

In Hospital Add Delete

Payment Options (F12)

Pay Now
 Pay Later

Visit Options

Remove Waitroom Non Visit
 Non Patient A/c After Care

Print Options

Print Voucher Print Preview
 Print PC1 Copies: 1

Payment Details

Full Payment Amount: \$32.10 Payment Type: EFTPOS Auto Bank To: WES
 Gap Payment

Cash
 EFTPOS Auto
 EFTPOS Manual
 Cheque
 Bankcard
 Mastercard
 Visa
 Amex

Hold Receipt Account Cancel

Processing Eftpos Payment



Details:

Payer: MR JOHN ANDREWS
Payee: Dr Feelgood
Device Name: Please enter terminal name
Amount: **\$32.10**

Instructions/Status:
Swipe card. Purchase: \$32.10

Processing EFTPOS Payment (Swipe Card) Cancel

Processing Eftpos Payment



Details:

Payer: MR JOHN ANDREWS
Payee: Dr Feelgood (2)
Device Name: Please enter terminal name
Amount: **\$32.10**

Instructions/Status:
Swipe card. Purchase: \$32.10
Select account
Processing transaction - please wait

Cancel

Processing Eftpos Payment



Details:

Payer: MR JOHN ANDREWS
Payee: Dr Feelgood (2)
Device Name: Please enter terminal name
Amount: **\$32.10**

Instructions/Status:
Swipe card. Purchase: \$32.10
Select account

Cancel

Popular Reports

FEES

Summary of Fees earned

RECEIPTS

Single Line Summary of Receipts or
Summary of Bulk Claim Receipts
Summary of Private Receipts, and
Summary of Institutional Receipts

OTHER

Bulk Claims Summary

MedicalDirector PracSoft - Reports 3.17 for

File

Report type: Arrears
Statements
Fees
Receipts
Financial including GST
Demographics
Other

Report name: Average Wait Times
Bulk Claims Summary
Held Accounts
Detailed List of Referrals
List of Referrals
Patient Visits by Practitioner
Monthly Visit Summary by Practitioner

Description: This report lists all Bulk Claims submitted within the period between the 'From:' and 'To:' dates specified below. For each Bulk Claim, the report details: Claim Number; Type; Claim Type; Claim Status; Transaction Date; Date Lodged; Amount Claimed; Amount Paid; Receipt Number; and Receipt Date. Totals are given for each Servicing Provider and for the practice as a whole.

Selections: Common

Date range: From: 1/01/1990 To: 29/05/2017

Page per practitioner: Yes No

Date selection:

Print Close

Extra Resources



[Medicare billing](#)

[Medicare billing – Chronic Disease Management](#)

[Medicare billing – Treatment of Skin Lesions](#)

[Medical Billing – Item Number Guides, Rules etc.](#)

[Practice Management Free Resources](#)

[Pracsoft free resources](#)

[Tyro Resources](#)

[Tyro website](#)

Tyro & Pracsoft youtube demonstrations:

[Integrated Easyclaim & Eftpos](#)

[Patient payments & bulk billing](#)

Thank you from Katrina Otto

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