

Practice Manager – Quick Start

To Run the Demonstration Disc or Internet Download

- 1) If you downloaded the program from the website, simply click **RUN** after saving the file to your computer. If you received a CD, insert the disc into the CD drive. The disc should run automatically. If not – use the following path
Start/Run/Browse/D:\setup.exe\OK
- 2) Follow program prompts as the CD starts to run. At the “Install” screen you will see that the program will be stored in the following area. C:\Program Files\Comsense\Practmgr – click “Install”
- 3) Install the “Full Product”
- 4) Remove disc
- 5) Run Clinic Manager from Start\Programs
- 6) Clinic Manager will open – click on “Proceed” – wait while the files are built.
- 7) A message will appear advising you that you are running in trial mode – click OK.
- 8) Another menu will appear asking for activation key codes, ignore this during the trial mode period – click Cancel.
- 9) User ID – type in “admin” tab
- 10) Password – type in “admin” enter

Initial System Setup

- 1) The system will automatically load the Patient Management Screen or Diary (depending on your selected preference)
- 2) There are a number of steps that you need to follow when setting up a new clinic. These have already been done in the installed system but we suggest you look at these areas and set them up in the following order to accommodate the needs of your own clinic. Remember all these areas are linked to the patient file, therefore need to be as complete as possible prior to entering patient treatments.
- 3) Diary (for booking appointments, treatments, billing and receipting payments)
- 4) Service Providers (the people that need to appear on the diary eg. Physiotherapist or General Practitioner)
- 5) Referring Sources (these may be doctors, employers, companies, friends, Yellow Pages, advertising campaign)
- 6) Treatment Types (eg. Physio, Pilates, Massage)
- 7) Billing Categories (eg. Private, Worker’s Compensation, MVA)
- 8) Insurance Types (eg. HBF, MBP)
- 9) Services/Items/Prices (eg. SC for Standard Consult)
- 10) Payment/Receipt Types (eg. Cash, Cheque, Credit Card, EFTPOS)

To Add Treatments from the Diary

Open the diary screen by select “Daily Diary” under the FILE menu at the top of the screen or pressing the F6 button. Position the mouse over the correct time slot/provider and press the Enter button. The press “P” for a patient appointment. Then select the correct patient from the list and press Enter. The Appointment detail screen will then appear to allow enter of notes, etc. Press OK when done.

Select the desired appointment by positioning the mouse and pressing the LEFT mouse button. Now press the RIGHT mouse button the display a menu of actions. Select the “Add Treatment” menu option. This will display a list of treatment codes. Select the correct code (eg. SC for Standard Consult) and press OK. The Treatment Details screen will be displayed to confirm all the information is correct. If the patient has been setup correctly, just press the **SAVE** button to confirm; otherwise, make any changes necessary and press **SAVE**. If the system has been setup to “Automatically Bill after each treatment”, a message will appear asking if it is “OK to bill the treatment?” If you are ready to print an account, press YES. If you want this treatment grouped with future treatments, press NO.

If you press YES, it will display a list of all unbilled treatments where you can de-select any that you want to delay putting on an account. When you press PROCEED, it will ask whether you want to add a payment. If you press YES, it will take you to the payment entry screen.

On the payment screen you can enter up to four different types of payments (eg. Cash, Cheque, Credit Card, EFTPOS, etc). If there is more than one unpaid treatment, the system will allow you to allocate the amounts to the oldest treatments first or you can specify the amounts next to each treatment. When you press the SAVE button, the account will be printed if there was only one account and it was fully paid. If the patient still owes money, it will ask if you want to enter another payment.

When finished entering payments, a screen appears asking which type of account to print (eg. Account without receipt, Combined Account/Receipt or None). Select the required option with the mouse. A list of system printers will then be displayed to confirm which printer to use.

Overall System Setup

From the Admin menu pad at the top of the page, choose System Setup. The “General” tab shows registered company details and allows selection of either the Diary or Patient screen at startup.

The “Accounts” tab enables you to decide how you would like to present an account to a patient. Generally clinics choose the “Combined Account Receipt” and “Automatically Bill after each Treatment”.

The “Diary” tab allows selection of specific colours for each type of entry. Clicking on the text (eg “Not Available”) will enable you to choose an alternative colour. You can also set the standard times that the clinic opens and closes, the appointment intervals that you generally use on your diary (each provider can have their own appointment interval) and the intervals that you want displayed on the diary (eg. 15 min, 20 min). These times can be varied individually for each clinic.

The “Statement” tab allows you to customise the debtors report. Generally clinics allow 30/60/90 days. You can change this if you wish (eg. 15/30/45 days).

The “Post Accounts” tab provides an area where you would select accounts for your balance sheet and profit and loss. These are generally set for default and do not require changes.

The “Acquisition Tax Codes” are generally set for default and do not require changes.
The “Sales Tax Codes” are generally set for default and do not require changes.
Click on “Close” when you have looked at these areas.

To Setup each Clinic including the Diary

From the Admin menu at the top of the page, choose “Clinic Setup”. This provides you with a screen where various amounts of information can be added for each clinic setup in the business.

The “Details” tab is used for company details to be printed on accounts. You can also specify the diary setup for each clinic (appointment lengths and display intervals).

The “Account Notes” tab is used to store messages that will be printed on ALL accounts and statements.

To Add Providers so they Appear on your Diary (includes Physios, Doctors, Massage Therapists, etc)

- 1) Choose the “Maintenance” drop down menu at the top of the page.
- 2) Choose “Service Providers”
- 3) Click on “Add”. Do not be tempted to change “None”. This should be left in place as it is the default and must not be deleted.
- 4) On the “Details” tab, enter the “Firstname” – tab
- 5) Enter the “Lastname” – tab
- 6) Immediately change the code that has appeared above “Firstname” to the name you would like to see on the diary eg PAUL.
- 7) Complete the remaining details on the screen, not forgetting the Provider Number and the Registration Number. These need to appear on accounts.
- 8) Click on the “Diary/Schedule” tab and enter the times and days that the provider is working in the Clinic (eg. Monday, Wednesday and Friday afternoons, Tuesday and Thursday mornings) as well as their preferred appointment interval (eg 15 or 20 minutes).
- 9) Click on “Show on Diary”, their name will appear on the diary
- 10) If the sequence of providers is important on the diary, you can choose their column position by using the “Diary Sequence” (eg. Sequence 1 will show their appointments on the leftmost column of the diary).
- 11) “Save” all the information, then “Close” the provider screen.
- 12) Open the diary by using F6, this should then show your providers.

To add Referring Sources

- 1) Doctors and companies must be added so they appear on the invoices. However, you can also add information following an advertising campaign by entering information in your Referring Sources area.
- 2) Choose the “Maintenance” drop down menu at the top of the page.
- 3) Choose “Referring Sources”.
- 4) Click on “Add”. Do not be tempted to change “None”. This should be left in place as it is the default and must not be deleted.
- 5) On the “Details” tab, enter the “Firstname” – tab

- 6) Enter the “Lastname” – tab
- 7) If you require the Doctors name to appear on the invoice you need to also type his name in the “Company” field.
- 8) Complete all remaining details and “Save” all the information, then “Close” the Referring Sources screen.

To add a Treatment Type

- 1) Treatment types include Physio, Massage, Pilates, etc. You can report on these areas and this especially identifies where your main business is being conducted. It also gives you the opportunity to track a new treatment introduced in to the Clinic eg Pilates may be new in the Clinic and you would like to report on this over a period of time to establish whether it is a successful addition to your business
- 2) Choose the “Maintenance” drop down menu at the top of the page.
- 3) Choose “Treatment Type”.
- 4) Click on “Add”. Do not be tempted to change “Generic”. This should be left in place as it is the default and must not be deleted.
- 5) On the “Details” tab, type in the “Treatment Type” eg Pilates or Massage. Save

To add a Billing Category

- 1) Billing categories enable you to charge a different price for Workers Compensation, Private, Veterans Affairs, etc while using the same treatment code (eg. SC for Standard Consult will automatically use a different price for patients based on their “Billing Category”).
- 2) Choose the “Maintenance” drop down menu at the top of the page.
- 3) Choose “Billing Category”.
- 4) Click on “Add”..
- 5) On the “Details” tab, type in a “Billing Category” code that suits your clinic, type in the full description. Do not allocate a “Payer” at this stage. This will be dealt with once the Patients and Payers are complete. Remember that a “private” billing category will remain empty as each private person will pay their own. “Payer” only becomes significant when adding eg: Workers Compensation. Save.

To add Insurance Types

- 1) Choose the “Maintenance” drop down menu at the top of the page.
- 2) Choose “Insurance Types”.
- 3) Click on “Add”..
- 4) On the “Details” tab, type in an “Insurance Type” code that suits your clinic, type in the full description. Save.
- 5) Insurance Types enable you to automatically insert the appropriate “insurance item code” (eg. A009) based on the patient’s Insurance Type (eg. SC for Standard Consult will use A009 if the patient’s insurance type is HBF and PB110 if the patient’s insurance type is MBF).

To add Services/Items/Prices

- 1) Have a list ready for all your services and items with their corresponding prices.
- 2) Choose the “Maintenance” drop down menu at the top of the page.
- 3) Choose “Services/Items/Prices”.
- 4) Click on “Add”
- 5) On the “Details” tab you have the opportunity to type in abbreviated codes for the items and services that best suits your Clinic (eg IC for Initial Consult, SC for Standard Consult). Codes cannot be used twice and once deleted cannot be used again. Alongside the item or service code, type in the full description.
- 6) Tab to the next box, and choose “Service”, “Inventory” or “Other”. Reports can be created from this data so it is important to choose eg. “Inventory” if you wish to report on how many items a provider is selling. Stock quantities will also be automatically reduced when selling inventory type items.
- 7) Decide whether an item attracts GST or not and choose the correct “Default Taxcode”
- 8) Choose a “Treatment Type”.
- 9) Click on “Add Billing Category” and add the various categories that apply (eg Private, Worker’s Compensation etc). and their prices. The “Private” billing category must be available for all items and should not be deleted.
- 10) You can also at this stage add your On Hand quantity for stock if you have entered an “Inventory Item”.
- 11) Click on the Insurance Items tab if you want to use different codes based on the patient’s insurance type. Press the “ADD Insurance Type” (eg. HBF) to add to the grid below and enter the insurer’s preferred item code (eg. A009) in the “Ins Item” column.
- 12) Press the Save button.

To add Payment/Receipt Types

- 1) Choose the “Maintenance” drop down menu at the top of the page.
- 2) Choose “Payment/Receipt Types”.
- 3) Here you nominate the ways in which payment is processed. Eg Cash, Hicaps, credit card, etc,
- 4) Leave the boxes alongside each type un-ticked for the moment.
- 5) Look at the “Details” tab and you will see that you can edit the “Payment/Receipt Types” and you can choose the order that you would like them to print on your bank deposit slip.
- 6) If you add a category, remember to save.

You are now ready to enter your patients and payers.

To add Patients, Payers and Treatments

- 1) Choose the “Maintenance” drop down menu at the top of the page.
- 2) Choose “Patients/Payers and Treatments”.
- 3) Select a patient from the list or press the “Add New Patient” button if they don’t exist yet. This button is also used to add new payers and third-party payers should be added **BEFORE** adding the corresponding patient so that they are available in the lookup list.

- 4) Complete “First Name” and “Last Name”, the “File As” box will automatically place the name in surname order, the “Code” box will automatically have a code inserted by the program.
- 5) The “Company” box can be complete if appropriate, otherwise, this can stay empty.
- 6) The “Provider” box should have the default provider inserted. You can do this by clicking the drop down arrow. Select the “Provider” to be used as a default (this can be overridden at time of treatment).
- 7) The “Payer” can be left blank if it is a private patient as the patient payer code will automatically be provided by the program. If the “Payer” is an insurance company, then you will need to enter a “Payer” eg: ICWA
- 8) Enter all contact details.
- 9) Enter “Patient Type” from the drop down menu. Press the **Save** button.
Click on the “Address” tab.
- 10) Complete all address details for the patient or payer.
Click on the “Billing” tab.
- 11) Complete all the details using the drop down arrows to assist you.
- 12) If you want the claim number to appear on the invoice you **MUST** enter the claim number in the “Ref” window.
Click on the “Treatment” tab
- 13) This is where you would add treatments by using the “Add Treatment/Item” button located at the top of the screen, 2nd from the left.
- 14) This is where you would raise an “Adjustment Note” for a treatment that has been billed but will not be paid.
- 15) This is where you would invoice by clicking on “Bill”, located at the bottom of the screen.
- 16) This is also where you would process a payment, by using the “Pay” button at the bottom of the screen (“Payer Payment” button is used to enter a payment for multiple patients from the same payer or insurance company).
- 17) The “Inquire” bottom gives a summary of all treatments and payments.
- 18) The “Treat” button at the bottom of the screen can be used to add a treatment by pressing the letter “T”.
Click on the “References” tab
- 19) Complete the fields by using the drop down arrows. If you want a name to appear on an invoice you **MUST** use the “Referror” window.
Click on the “Financial” tab.
- 20) Use this area to keep a patient’s financial details – not compulsory.
The “Notes” and “Outcome” tabs can be used by the clinic to store information about the patient.
The “Payments” tab shows a list of payments.
The “Appt” tab shows all appointments that have been booked by the patient, past and present. You would use this tab when a patient calls and wants to confirm an appointment that has been made in the future.
Remember to click on Save.

You are now ready to insert appointments in the diary, bill patients and accept payments.

Hot keys include

F5	Select a Patient/Payer and display details
F6	The Diary
F7	Create Bank Deposit Slip
F8	Calculator
F9	Calendar
Right Click on Mouse	With the mouse positioned over a grid, this displays a list of options for you to choose.

There are many quick ways to move around the screen, these can be provided in a training session.

This is only a demonstration disc and there is plenty more to learn once you have decided to purchase PRATICE MANAGER as your preferred choice of product.

To Add Appointments to the Diary

The entire system can be driven from either the Patient/Payer screen (typical data entry approach) or from the Diary.

Press the F6 key to display the diary. Each column will show the appointments for a different provider. The time display in the left column can be varied by using the system setup options.

The “?” button will display a full help screen for diary functions.

The four icons at the bottom of the diary (Patient Appointment, Note, Reservation, Class) can be “dragged” onto the appropriate column/time position in the diary to create appointments. Multiple appointments can be placed in the same column/time position. Notes can also be typed directly into the diary by placing the mouse over the desired column/time position and begin typing.

- 1) To add a patient appointment, press and hold the Right mouse button while positioned over the “patient appointment” icon at the bottom of the diary screen. A second icon will appear. “Drag” this icon to the correct column/time slot and release the mouse button. A list of patients will then appear. Select the correct patient or press the “Add Patient” button if it is a new patient. The length of the appointment will be either the providers normal appointment interval or, if it is a new patient, 60 minutes will be allocated. This can be changed using the mouse to stretch or shrink the appointment.
- 2) Double-clicking on the appointment text will also display the EDIT screen which can be used the add more text, cancel the appointment, change the time, etc.
- 3) Patient appointments will also display an icon to indicate status (eg. “bell” to indicate pending appointment, “person” to indicate patient arrived, “checkbox” to indicate a treatment has been recorded).
- 4) Right-clicking on an appointment will also display a list of options.
- 5) Patient appointments cannot be deleted, only cancelled with a reason. This information can be displayed on an Appointment Status report to enable re-booking of missed appointments.

To Add Classes to the Diary

- 1) Classes can be added in the same way by dragging the “Class” icon and selecting the type of class (eg Pilates) and the item code to use for billing. A “house” icon will be displayed to indicate a class as opposed to a patient appointment.
- 2) Double-clicking on a class will display a screen for entered the class attendees for later bulk billing. Each attendee can have a different price and description for the class.
- 3) Classes can be deleted if necessary.
- 4) Accounts are automatically produced for all class attendees by double-clicking on the class appointment, checking the box for all attendees and pressing the “Bill Attendees” button at the bottom of the screen. Make sure that you also select the “Print Invoices” option if you want the accounts printed as well. The system will advise you of the number of invoices created.