How do I set up the Best Practice Management Module?

This FAQ is intended to answer the common questions about setting up and configuring the Management Module of Best Practice Software.

Management

When a licence key that has Best Practice Management enabled is entered, a number of new toolbar icons and menu items become available in the best practice screens.

On the main menu, a Management item appears in the menu options. In addition, new icons will appear for Appointment Book and Waiting room on the screen depending upon the user’s permissions within Best Practice. There will also be three new options under the ‘Setup’ menu option – Sessions, Practice fees and Cheques. The Setup > Configuration window will have several new pages to allow you to configure Appointments, Billing, Account text, Payer allocation, Bank accounts, and Work Cover details.

Summary of steps to set up Management Module

- Practice Details
- Configuration
  - Appointments
  - Billing
  - Account Text
  - Payer allocation
  - Bank accounts
  - Workcover details
  - Online Claiming
  - Links
- Users
  - User permissions
- Sessions
- Practice fees
- Cheque Details
- Account holders

Other areas of interest

- Appointment book
- Waiting room
Setting up Practice Details

Select **Setup > Practice details.** The practice details screen will appear. Edit each location on the list by highlighting the location and clicking ‘**Edit.**’

A checkbox allows you to set the location’s Rural/remote area status. If this box is checked, item 10991 will be added to Medicare Direct bill accounts for eligible patients. If this is not checked, item 10990 will be added for these patients.

Configuration of Best Practice Management

The Configuration window contains several pages related Best Practice Management.

**Appointments**

This page is used to set up the default appearance of your Appointments window.

**Start time** sets the time of the first displayed appointment slot.

**End time** sets the time of the last displayed appointment slot.

These times are independent of the times setup for user sessions. If a user has sessions setup outside these ranges, those appointment slots will not be visible on screen. It is usual to set these times one or two slots before and after the first and last appointments of the day to create a “margin” at the top and bottom of the appointment window.

**Appointment length**

- Allows you to set the basic length of an appointment slot.
- All appointments in the system must be multiples of this length. If it is set to 15 minutes, appointments will only be able to be made at 15, 30, 45, 60 minute intervals.
- If you have some doctors having appointments at 10 minute and some at 15 minute intervals, then this setting will need to be set to 5 minutes to allow them to be displayed on the same Appointments window.
- You should carefully consider the length you set here. Too small an interval will result in a large number of slots being displayed, with an increased need to scroll up and down to find a particular timeslot.
- Since the Appointments window allows double and even triple booking into the same timeslot, it may be more practical to use a 10 or 15 minute basic appointment length with double bookings for the users who need shorter appointments.
- Once this length has been set, changing it may result in appointments that have already been booked not appearing properly in the Appointments window, e.g. if appointments have been booked at 10 minute intervals and this setting is then changed to 15 minutes, the appointments that do not correspond with the new times will be displayed at the next closest time after their original appointment time.

**Note:** Individual doctor’s appointment lengths are set when setting up their sessions.
**Appointments (cont.)**

**Refresh Interval** sets the number of seconds between each refresh of the ‘Appointment book’ screen.

**Minimum column width (pixels)** sets the minimum column width (in pixels) for each column on the appointment screen.

**Display Sunday in appointment window** - check this box to include Sunday as a column in the display of week view in the ‘Appointment book’ screen. If this is not checked, Sundays can still be displayed by selecting them when the Appointment window is in day view.

**Highlight row when Time column clicked** - This checkbox causes an entire row on the ‘Appointment book’ screen to be highlighted in solid colour when the Time column is clicked.

**Pop up notes when making an appointment** - BP allows notes to be recorded against a patient’s name in the ‘Appointment notes’ field on Patient demographics window. It also generates notes if a patient has outstanding accounts, or is due for a reminder to be sent etc. These notes are displayed on the ‘Add appointment’ window when making an appointment. If this box is checked, as well as being displayed there, a pop up window is displayed at the time of selecting the patient to make an appointment.

**Pop up notes when patient arrives.** If this box is checked, the patient notes described above are displayed in a pop up box at the time that the patient is marked as Arrived in the Appointment book.

**Pop up notes when creating account.** If this box is checked, the patient notes described above are displayed in a pop up box at the time of creating an account for the patient.

**Colour booked appointments differently from unbooked.** If this box is checked, booked appointments are displayed in a pale blue colour. If not, they retain the colour of unbooked appointments in the same session.

**Waiting room options**

**Show uncompleted appointments in Waiting room when opened.** If this check box is checked, patients that are currently “With doctor” or “At billing” remain displayed in the Waiting room window. If not, then they are removed as soon as the doctor opens their record and starts a visit.

**Allow patients to be added directly to Waiting room.** If this is checked, patients can be added to the waiting room without having had an appointment made in the Appointment window.

**Allow patients to be added to Waiting room for 'Any doctor’.** If this is checked, patients can be added to the waiting room without being allocated to a specific doctor. They will be visible in all doctor’s waiting room screens and any doctor can choose to see them.

**Billing**

**Provider’s billing default** - This sets the default billing type for new users when they are added.

**Patient’s billing default** - This sets the default billing type for new patients when they are added.
Billing precedence - This setting determines whether the doctor’s or patient’s billing type is used when the two are not the same. If it is set to Doctor, then all patients seen by that doctor will be billed according to the doctor’s default billing. If set to Patient, then the patient will always be billed at the rate set as the patient’s billing type. This setting only sets the initial default rate used when an account is created, and can always be changed before printing or saving the account.

Enforce entry of reason for cancelling payments and invoices – tick this to ensure that users have to enter a reason for cancelling payments and invoices

Create separate accounts in Debtor list for each doctor – if ticked, the debtor list will generate separate debtor statements for each doctor and a drop down box will appear on the ‘Debtor list’ screen to allow you to select the doctor. If unticked, the ‘Debtor list’ screen will produce debtor statements for the practice rather than each doctor.

Print practice name on accounts, receipts and statements – if ticked, the practice name and address entered in the Setup > Practice details > Edit screen will be printed on all accounts, receipts and statements. If unticked, the doctors name and details will be printed on all accounts, receipts and statements.

Prevent Direct Bill vouchers without Medicare and DVA no. – if ticked, accounts which are being direct billed to Medicare or DVA can’t entered if the Medicare number or DVA number is not recorded on the patient’s demographic record. If unticked, accounts can be direct billed if the Medicare number or DVA number is not recorded.

Allow invoices with no services to be printed – if ticked, it is possible to print an account that does not contain any services. If unticked, blank accounts can not be printed.

Print invoices and receipts on A5 paper – if ticked, all invoices and receipts will print in A5 format. If unticked, all invoices and receipts will print in A4 format.

Print header on invoices and receipts – if ticked, all invoices and receipts will have the practice or doctor details printed at the top of the page (see also setting for Print practice name on accounts, receipts and statements). If unticked, nothing will be printed at the top of invoices and receipts so that letterhead can be used.

Account text

This sets the text that is printed at the bottom of accounts. It can be set to display different text based on whether the account contains overdue items, and the length of the overdue period for each of the text items can be set.

It also allows a Discount text message to be set. This text will be printed on any accounts that are billed at a rate called “Discount”. It can contain the placeholder “%FEE%” which will be replaced at the time of printing by the value of the account if it had been billed at the Practice fee rate.

Payer allocation

This page allows you to direct bulk billing payments to a provider other than the provider who provided the service. Click the Add button and select the provider from the list then enter the provider number of the provider to have the payment cheques directed to.
Bank accounts

The top section of the page allows you to enter details of the Practice Bank account. The bottom section of the page allows you to enter one or more bank accounts for each provider in the database. These are used when creating Billing Batches.

To create the bank accounts you will first need to enter the bank names in the Cheque Details area, refer to the “Cheque Details” section.

WorkCover details

This page allows you to enter the details that will be used on accounts when WorkCover is selected in the Create account window.

Note: These details would most likely be used in Queensland where there is a centralised facility for Workcover. In other states, Workcover accounts are issued to individual employers or insurance companies. Refer to BP Help and section on Create PatientAccount and refer to section on ‘Bill to Other’.

Online Claiming

This section is used to configure Medicare Australia Online Claiming. Refer to the documents BPM_FAQ-Setting up Medicare Australia Online.pdf and BPM_FAQ-Using Medicare Australia Online.pdf for further information on how to configure Online claiming in Best Practice.

Links

If the practice previously used a third party billing package and had a link established to transfer information between Best Practice and this third party package, it will be necessary to disable this link. To turn off the link, untick the selection ‘Activate the link to another package’. This will grey out all the paths and disable the linking process.

Note: It may be necessary to disable this setting on all workstations.

Setting up Users

A number of Management related settings are available on the Setup > Users window.

Users who are doctors, nurses or allied health professionals will need to have ‘Has accounts’ and ‘Has Appointments’ checkboxes enabled.

- If the ‘Has appointments’ box is checked, that user will appear in the Appointment book and will be able to have appointments made.
- If the ‘Has accounts’ box is checked, the user will appear in the drop down list in the Accounts window, and will be able to have accounts generated in their name. The ‘Default account type’ and ‘Default item number’ can be entered in the appropriate boxes.
- If the user is a doctor, then Vocationally Registered and DVA LMO checkboxes are also enabled.
- If **Vocationally Registered** is checked, the appropriate VR Medicare item numbers will be used as defaults on accounts for that user.
- If this box is not checked, a warning will be displayed when attempting to save or print accounts containing VR item numbers.
- When the **DVA LMO** box is checked, accounts for DVA patients will use 115% of the Medicare fee as the default fee. 10990 and 10991 items will also be added automatically to these accounts.

**Management Permissions**

A number of new permissions have been introduced for the Management module.

When a new user is added, they should automatically be allocated permissions according to the category they are allocated to.

*Note: Existing Best Practice users will have no management permissions and will need to have these allocated before they can use any of the management features.*

For versions 1.6.0.405 and later the option to "Set Reports" is also available to select which reports which users will have access to.

**User Permissions**

<table>
<thead>
<tr>
<th>Section</th>
<th>Permission</th>
<th>Activation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily message</td>
<td>Allow access</td>
<td>Allows the user to be able to create a 'Daily Message' that will appear at the top of the Appointment book screen. User will not be able to create a new 'Daily Message' but will still be able to see the one created.</td>
</tr>
<tr>
<td></td>
<td>Deny access</td>
<td></td>
</tr>
<tr>
<td>Appointments</td>
<td>No access</td>
<td>Appointments and Waiting room windows will not be available. Allows appointments to be viewed in both the Appointments and Waiting room windows, but not added or changed. Allows full use of the Appointments and Waiting room windows.</td>
</tr>
<tr>
<td></td>
<td>View only</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add/Edit/Delete</td>
<td></td>
</tr>
<tr>
<td>Double Book</td>
<td>Not allowed</td>
<td>User will not be able to book two appointments for the same time for the one doctor. User can book two appointments for the same time for the one doctor.</td>
</tr>
<tr>
<td>appointments</td>
<td>Allowed</td>
<td></td>
</tr>
<tr>
<td>Override Reserved</td>
<td>Not allowed</td>
<td>User can not enter an appointment into a ‘reserved’ time slot.</td>
</tr>
<tr>
<td>appointments</td>
<td>Allowed</td>
<td>User can override a ‘reserved’ time slot and enter an appointment.</td>
</tr>
<tr>
<td>Waiting room</td>
<td>No access</td>
<td>Waiting room icons and menu options will not be visible. User can view patients in the Waiting room but cannot add new appointments. User can perform all actions related to the Waiting room.</td>
</tr>
<tr>
<td></td>
<td>View only</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add/Edit/Delete</td>
<td></td>
</tr>
<tr>
<td>Accounts</td>
<td>No access</td>
<td>Accounts will not be able to be created and patient’s account histories will not be able to be viewed.</td>
</tr>
<tr>
<td></td>
<td>Add only</td>
<td>User can create new accounts but is unable to view account histories or change or cancel any accounts.</td>
</tr>
<tr>
<td></td>
<td>Add / View</td>
<td>User can create new accounts and view account histories but they are not able to change or cancel any accounts.</td>
</tr>
<tr>
<td></td>
<td>Add / Edit</td>
<td>User can create new accounts, view account history and change existing accounts but are not able to delete, cancel or write off accounts.</td>
</tr>
<tr>
<td>Section</td>
<td>Permission</td>
<td>Activation</td>
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<tr>
<td></td>
<td>Add / Edit / Delete</td>
<td>Allows full use of the accounts functionality in the system.</td>
</tr>
<tr>
<td>Payments</td>
<td>No access</td>
<td>Payment will not be able to be entered</td>
</tr>
<tr>
<td></td>
<td>Add only</td>
<td>User can enter new payments for accounts but is unable to view account</td>
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<td></td>
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<td>histories or reverse or adjust any payments.</td>
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<tr>
<td></td>
<td>Add / View</td>
<td>User can create new accounts and view account histories but they are not</td>
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<td>able to change or cancel any accounts.</td>
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<td>Add / Edit</td>
<td>User can create new accounts, view account history and change existing</td>
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<td>accounts but are not able to delete, cancel or write off accounts.</td>
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<td></td>
<td>Add / Edit / Delete</td>
<td>Allows full use of the accounts functionality in the system.</td>
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<tr>
<td>Direct Billing</td>
<td>No access</td>
<td>User will not have access to the direct billing function</td>
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<tr>
<td></td>
<td>Add only</td>
<td>User can create new Direct billing batches but can’t modify existing</td>
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<td></td>
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<td>batches or reconcile a batch.</td>
</tr>
<tr>
<td></td>
<td>Add / View</td>
<td>User can create new Direct billing batches but is unable to modify</td>
</tr>
<tr>
<td></td>
<td></td>
<td>existing batches or reconcile a batch.</td>
</tr>
<tr>
<td></td>
<td>Add / Edit</td>
<td>User can create new Direct billing batches, modify existing batches or</td>
</tr>
<tr>
<td></td>
<td></td>
<td>reconcile a batch – they cannot delete batches.</td>
</tr>
<tr>
<td></td>
<td>Add / Edit / Delete</td>
<td>User can perform all actions for Direct bill batches.</td>
</tr>
<tr>
<td>Reports</td>
<td>Allow access</td>
<td>User can access all reports displayed under Management &gt; Reports</td>
</tr>
<tr>
<td></td>
<td>Deny access</td>
<td>User cannot access any reports displayed under Management &gt; Reports</td>
</tr>
<tr>
<td>Setup sessions</td>
<td>No access</td>
<td>User cannot access the Setup &gt; Sessions function</td>
</tr>
<tr>
<td></td>
<td>View only</td>
<td>User can view Sessions but not add new or modify existing ones</td>
</tr>
<tr>
<td></td>
<td>Add / Edit / Delete</td>
<td>User can perform all actions for Sessions</td>
</tr>
<tr>
<td>Setup fees</td>
<td>No access</td>
<td>User cannot access the Setup &gt; Practice Fees function</td>
</tr>
<tr>
<td></td>
<td>View only</td>
<td>User can view Practice Fees but not add new or modify existing ones</td>
</tr>
<tr>
<td></td>
<td>Add / Edit / Delete</td>
<td>User can perform all actions for Practice Fees</td>
</tr>
<tr>
<td>Banking</td>
<td>Allow access</td>
<td>User can perform all actions for the Banking function</td>
</tr>
<tr>
<td></td>
<td>Deny access</td>
<td>User cannot access the Banking function</td>
</tr>
<tr>
<td>Cheque details</td>
<td>Allow access</td>
<td>User can access cheque details function</td>
</tr>
<tr>
<td></td>
<td>Deny access</td>
<td>User cannot access cheque details function</td>
</tr>
</tbody>
</table>

**Setting up sessions**

The **Setup > Sessions** menu item opens a window where you can set up sessions for the practice and each user who has appointments.

You are also able to set up default sessions *practice defaults* that can be allocated to new users when they are added.

This window is also used to setup holidays and after hour’s rosters.

When the window is first opened, the list at the top is set to Practice defaults.

This drop down list also contains the names of all users who have the ‘Has appointments’ box checked in the **Setup > Users** function.

The list of sessions entered against *Practice defaults* work as the default for each user unless a specific set of sessions has been created for that user.

If the majority of the doctors have the same appointment times, then create the sessions
against ‘practice details’ and modify for the relevant doctors. If the doctor have a variety of sessions then it may be quicker to create individual sessions for each doctor.

When set to Practice defaults, the **Standard sessions, Days closed** and **Reserved appointments** radio buttons are enabled. When set to individual providers, the **Extra Sessions** radio button is also enabled.

### Standard sessions

To create a session, click the **Add** button. The Session details window will open.

Select the day of the week for the session, its start and finish times, length of appointments in the session and the colour to use to display the session in the Appointments window.

To allow rapid entry of sessions, the Day of week list contains a Monday to Friday entry. If this is selected, the session that is set up will be saved for each day from Monday to Friday.

After saving, these sessions can then be modified individually for doctors as necessary. For example, if you have a doctor who has 15 minute appointments between 2pm and 5pm each day, but on one day a week has 30 minute appointments to perform excisions, then you can setup the sessions as Monday to Friday with a length of 15 minutes, then after saving them, highlight the appropriate afternoon and edit it, changing the appointment length to 30 minutes (and possibly give it a different colour as well to indicate that only excisions should be booked in those slots).

When setting up sessions for users, the Start date and End date fields can also be entered.

These settings allow you to set the dates when the sessions will start and finish showing in the appointments window. This allows you to have a new doctor who is starting in a month’s time appearing in the Appointments window and able to have appointments booked without any risk that they will get booked prior to their starting date.

It also allows you to prevent appointments being booked for a doctor after the date that they leave the practice. Multiple sessions can be recorded on each day, each with their own appointment length and colour in the Appointments window. Once sessions have been added, the **Edit** and **Delete** buttons can be used to modify and remove any session highlighted in the list.

### Days closed

When this radio button is selected, you can enter dates when no appointments can be made for any user. This can be used to set public holidays and dates that the practice will be closed.
Reserved appointments

These are appointment slots that are displayed in the Appointments window as “Reserved” on all days later than the current date.

When they are displayed as reserved, attempting to book an appointment in the slot will display a warning that it is a reserved appointment, although it does not prevent you from taking the appointment slot. They are intended to indicate appointments that are not to be used until the appointment date, ensuring that there are always free appointments available on the day.

Extra sessions

When this radio button is selected, you can enter sessions for that user on specific dates. This allows you to enter Saturday morning and evening rosters.

Days away

When this radio button is selected, you can set dates where no appointment slots will be available for the user. This allows you to enter annual leave dates etc.

Note: Whenever a new user is added, if they have the ‘Has appointments’ box checked, you will be asked whether they should use the Practice default sessions. If you answer Yes, they will be given the Practice default sessions and Reserved appointments. If you wish to customize their sessions, you can then open the Setup sessions window and edit them as required.

Setting up Fees

Best Practice Management is distributed with the fee schedules for Medicare and the Department of Veteran’s Affairs.

When first installed, Best Practice Management contains the Medicare and DVA fee schedules and a built in Practice fee schedule.

The built in Practice fee defaults to the Medicare Benefits Schedule fee for each Medicare item. These three (3) schedules are available for use in the Account details window when creating an account. The Medicare and DVA fee schedules cannot be changed nor added to by the user.

The Practice fee schedule can be changed and can have other items added to it, and other fee schedules can also be added, e.g. AMA fees, Workers Compensation fees, etc. These additional fees can be setup via the Setup > Practice fees menu item. This opens the ‘Setup practice fees’ screen, where fee schedules and fees can be added and modified.

Added custom Items

Custom items are those items that are not included in the Medicare and DVA fee schedules. At the top of this screen there is a ‘Customised Fee list’. This lists all items that have been customised by the practice. This list will appear when Finalising a Visit or Creating an Account.
To add a custom item such as AMA fees, click on the ‘Add custom fee’. The ‘Setup fee item’ screen will appear.

Type in the item number and description of the item in the ‘Item description’ field.

Highlight the appropriate Fee schedule that you want to set this fee for and click the ‘Set fee’ button. Refer to section below on Adding additional fee Schedules to add additional schedules to group these fees into.

The ‘Calculate fee’ window opens and allows you to enter the desired fee. For items that are not related to MBS Item no, you can not select ‘Use schedule fee’ or ‘Schedule fee + n %’. Click ‘OK’ to save the change.

The fee entered will now appear against the relevant Fee schedule selected. Tick the item ‘Apply the highlighted amount to all customisable items in list’ to set this fee for all schedules listed. Tick the item ‘Add GST to this item when adding to account’ if this item attracts GST. Click ‘Save’ to save the fee. It will now appear in the ‘Customised fee list’.

Modifying the Practice fee

It is also possible to set a Practice fee for a MBS item.

Existing items

If the item is already showing in the ‘Customised Fee list’, double click on the item to display the ‘Edit fee item’ screen. Highlight the ‘Practice fee’ schedule and click the ‘Set fee’ button.

The ‘Calculate fee’ window opens and allows you to enter the desired fee. It also enables you to calculate the fee based on a percentage of the schedule fee, or by adding a fixed amount to the schedule fee.

Whichever method is chosen, the fee displayed in the ‘Enter the fee to charge’ box will be saved for that item.

Note: This fee is static and does not change when the schedule fee changes, even if it was calculated from the schedule fee.

This fee will now be used when creating accounts when the ‘Practice fee’ schedule is used and that item number is selected.
New items

If the item is not already showing then click the ‘Set MBS item fee’ button.

The ‘Set MBS Item fee’ button will be displayed. Enter the relevant item number. The MBS and DVA fees will be displayed in a list below the description of the item. Highlight ‘Practice fee’ and double click or press the ‘Set fee’ button to change the fee that will be charged for it. The ‘Calculate fee’ screen will appear and the relevant fee to change can be entered as in the step about for ‘Existing items’.

Adding additional fee Schedules

To enable you to group the desired custom fees when creating an account, you can set up custom fee schedules.

On the ‘Account details’ window, all fee schedules that you have set up will be listed in the ‘Billing schedule’ pick list. After you have selected a Billing schedule from this list, any items added to the account will automatically use the fee for that item in the selected schedule.

You can have an unlimited number of custom fee schedules.

To add a fee schedule, click on the ‘Add schedule’ button at the bottom of the ‘Setup Practice fees’ screen. The ‘Fee schedule’ screen will appear. Enter the name of the schedule and then indicate the default calculate method. You have the option of entering no calculate method which means that you will enter the fees directly against this schedule.

Note: If you create a fee schedule called "Discount", any accounts generated using that schedule will have the text from the Discount text field on the configuration/Account text window added at the time of printing the account.

Cheque details
This page allows you add the names of banks to appear in the drop down list when adding cheques to the ‘Process Payment’ window.

It also allows you to add the names of payers who regularly pay by cheque so that they will appear in the “Drawer” list when adding cheques to the Payments window.

To access this screen select Setup > Cheque details from the main Best Practice screen.

**Account Holders**

Accounts holders are companies and institutions for which you will be creating accounts. They can be used as the third party account recipient for patient accounts to be made out to (ie Insurance Company, Employers, Hospital, etc). They can also be used as the account recipient for non-patient accounts.

To access this screen select View > Account Holders from the main Best Practice screen.

**Other Management related menu items**

The Appointment Book and Waiting Room are the core elements of the Management Module.

It is recommended that you refer to the relevant sections of the Best Practice Help screen to familiarise yourself with its use.

**MORE INFORMATION**

For more information consult the Best Practice Help Library or contact us via our

- 07 4155 8800
- 07 4153 2093
- support@bpsoftware.com.au
- sales@bpsoftware.com.au

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