

## IES Medical: Operating Settings

### Purpose

The purpose of this Document is to explain the standard operating settings of the Medical system, and how to adjust them to suit your requirements.



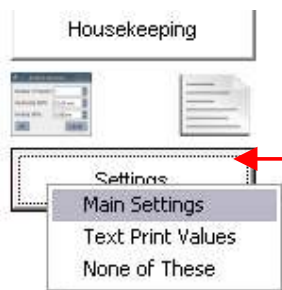
### Introduction

The Operating Settings for your system (specifically related to the Medical module – there are also others for other modules) are divided in 2 parts: -

- The Main Settings (i.e. parameters to which the system adapts it's functioning)
- The Alternate Language Text Values

### Selecting the Operating Settings

From the main Medical menu, choose SETTINGS.




When the SETTINGS options is selected, you may then choose between 'Main Settings' and 'Text Print Values'.


### Main Settings

The Main Settings are required parameters for the Medical system, and below we show what they look like.


The function buttons at the top of the screen allow you to define new Markups, Groups, Categories and Ratings. All of these indicators relate to how your Customer Accounts are treated, and how they may be selected during Statement production. Generally though, the choices set up for these when your system is implemented, will suffice. Hint: You can read more about these options by checking the help (F1) on the fields that indicate Markup, Group, Category and Rating.

Below, we show a choice of Receivables / Debtors Control Accounts, but in most cases there is just 1 such Account. The ability to have multiple such Accounts is useful for Practices where you want the Customers (Patients) divided into distinct groups like Medical Aid, Private, etc., and in this case it is very easy to measure the volume of Business for each Group, the outstanding Balance for each Group, and so on.

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## Medical Practice Operating Settings



Define Markup
Define Group
Define Category
Define Rating
Save

**Default settings for Auto Debtor Accounts**

Rating	std
Category	med Medical
Group	mp Medical Patients
Markup	std Default - no markup

**System Settings**

Verify Patient Records:

Alternative Language:

Open Item

Allow Company Account Holders

Integrate To Hospital Invoicing

**Choice of AR Debtors Ctrl Accounts**

AR Control Accounts	
1	100-00035 DEBTORS CONTROL (1)   PRIVATE
2	100-00036 DEBTORS CONTROL (2)   PRIVATE
3	100-00037 DEBTORS CONTROL (3)   PRIVATE
4	100-00038 DEBTORS CONTROL (4)   PRIVATE
5	100-00039 DEBTORS CONTROL (5)   PRIVATE

**Invoice and Statement Printing**

Practice Name	Dr. Rozoux and Associates
Address Label 1	PO Box 13356 Wyndham 62745
Address Label 2	323 Marlboro Drive Wyndham
Contact Label 1	Tel: 55-22543 Fax: 55-22544
Contact Label 2	drrozouxandassoci.com

CAUTION: Parameters shared with Hospital Module

Under the heading of 'System Settings', we find the following: -


**Verify Patient Records** – this choice is based on 'enforce', 'offer' or 'skip'. Whenever a Consultation is opened, the system will check this indicator. If it is on 'enforce', then the system will automatically open the Patient and Account Holder screens for the User to verify that the details are still current. If it is on 'offer', then the User can choose each time whether to verify details. If the indicator is on 'skip', then this step (to verify current details) is bypassed.

**Alternative Language** – The system, by default, will render Customer Invoices and Statements in English. If an alternate language is indicated, then for each Patient, a language choice between English and the alternate language can be made, and where indicated, Invoices and Statements will be rendered in the alternate language.

**Open Item** – This box should always be checked, i.e. to manage Patient Accounts as 'Open Item'. IES has the capability to manage Accounts as 'Open Item' and 'Balance Forward' at the same time, and seamlessly so if 'Open Item' is selected, and therefore this is the best choice. It also makes Payment matching (Receipts) to Charges that much easier.

**Allow Company Account Holders** – If this box is checked, then the User has to make a choice when opening a new Account Holder record, whether it is a Company or an Individual. If the Practice does not deal with Company Accounts, i.e. only Private / Individual persons being responsible for payment, then do not check this field, as this then reduces the opening of an Account Holder record with 1 step.

**Integrate to Hospital Invoicing** – This box should only be checked where the Practice is part of a Hospital, and the Hospital module also being used. In such cases, the Invoices between the Hospital and the Medical Practice are integrated.

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Under the heading of 'Invoice and Statement Printing' there are listed a few fields that should be completed. These values are used when generating Invoices and Statements, i.e. the text values to include for the Practice Name, address, contact details, etc.

**Text Print Values**

The text print values are used exclusively for Statement and Invoice production, and by adapting the 'Adapted Text' values, even the English wording can be changed. More specifically, under '2<sup>nd</sup> Language Text', it is necessary to provide the equivalent text for an alternate language (if in use), so that the system can use these values when producing alternate language Statements and Invoices.

In the example shown here, the alternate language is Afrikaans, but it can be any language of your choice.

Medi Print Values and Translations

EXIT
Save

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The primary values used on Medi Prints cannot be changed, but can be substituted by values on the right.

Specify adapted English Text below, but only if the standard value on the left should be substituted by the new value.

If a 2<sup>nd</sup> language is in use, then state the translated values to be substituted here for prints in 2<sup>nd</sup> language.

Base Text	Adapted Text	2nd Language Text
1 Tax Invoice		Faktur
2 dated		gedateer
3 VAT Number		BTW no
4 Account		Rekening
5 Patient		Pasient
6 Receipt		Rekening
7 Current		Huidig
8 days		dae
9 Statement		Staat
10 Date		Datum
11 Description		Beskrywing
12 Doc		Dok
13 Qty		Items
14 Amount		Bedrag
15 Opening Balance		Saldo Oorgebring
16 Closing Balance		Kind Saldo
17 Page		Bla
18 Tax Credit Note		Kredietnota

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