

IES Medical: Master Files

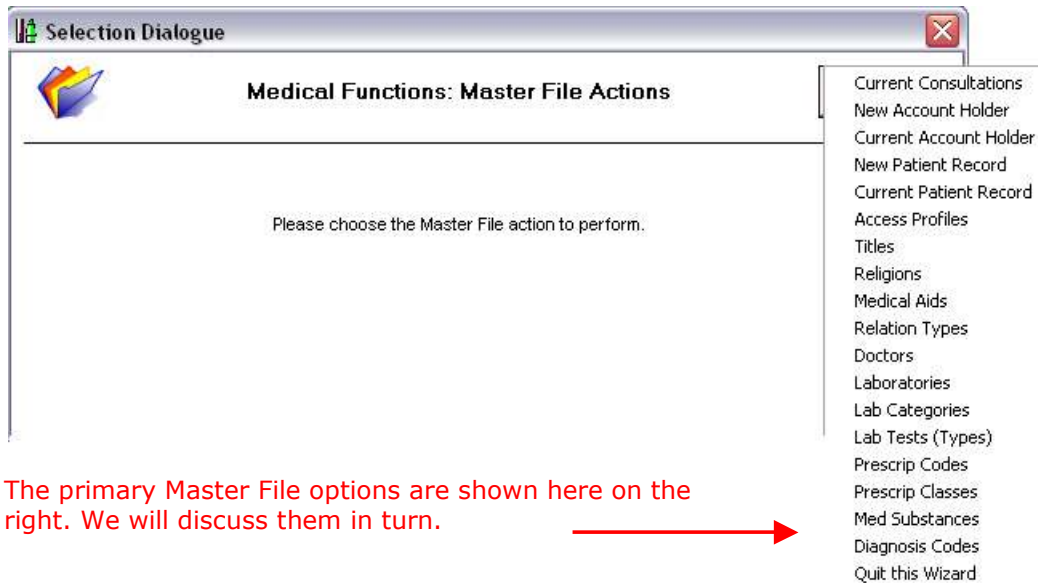
Purpose

The purpose of this Document is to introduce the Master File options in the Medical system.



Introduction

The Master File function is selected directly from the main Medical menu.




The primary Master File options are shown here on the right. We will discuss them in turn.


Current Consultations

This option is the same as offered on the 'Consultations' function, and is included here for convenience. It leads to selection of a current Consultation and presents the Consultation screen for transacting.

New Account Holder

This option is used to create a new Account Holder, and is also automatically entered when a new Consultation for a new Patient is opened and when the Account Holder record does not yet exist. The system assigns the Key for the new Account automatically.

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 Health Care: Account Holder Detail

Account Holder #	1	Billing Address	PO Box 231 Cape Town
Title	MR	Postal Code / Zip	6000
Surname	Van Heerden	Billing Tax No	
First Names	1 Johannes 2 Petrus	Street Address	
Initials	J. P.	Postal Code / Zip	
Identify #	930912000003	Occupation	
Date Of Birth	12/09/1963	Employer	
Sex	Male	Employer Address	
E-Mail	jprvh@hotmai.com	Postal Code / Zip	
Cell / Mobile Phone #	9826239965		
Tel @ Home			
Tel @ Work			
Medical Aid			
Medical Aid #			
Plan Book			
Invoice Processing	1 Direct To Account		
Invoice Submission	1 Account Holder		
Language	English		

The Account Holder record consists of fields which are in some cases forced, and in others are optional. All are quite simple and requires little further explanation. For this screen, as for others discussed below, you can also check the on-line help for more information on the current field being captured or edited (e.g. F1 or Help icon), and if you are not sure whether a field is forced (it usually indicates so on the help, i.e. whether or not) you can try to bypass it – if it is mandatory the system will beep and advise that you have to fill that field.

Current Account Holder

This option is used to change, update or otherwise maintain exiting records. It will ask whether you know the Account number or want to search for it. Once the record is selected, it is the same as shown above for new records.


 Selection Dialogue X

Find Existing Account Holder

I know the Account Number
I know Account Holder ID
Search

We will now attempt to find an Existing Account.

You may specify the Account Number if you know it, or else you will be presented with a Screen on which you can narrow the Data Search by specifying Surname and/or ID Pattern.

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New Patient Record

As is the case with a new Account Holder, this option is also automatically initiated when a Consultation is opened and the Patient is new. When the Account Holder (person responsible for payment) happens to be the same person as the Patient, then the system will automatically cross default the information already captured on the one or the other. Patient record keys are also assigned by the system, as for Account Holders. Below, we show a Patient record for the same person we have shown the Account Holder above.

Once again, there are simple fields to capture, some optional, some forced. There are also some other functions, e.g. 'New Title' is used if, while capturing a new Patient record, there is no suitable title to select, and then there is no need to leave the current screen – you can simply define a new title and return to where you have left off.

There are also options (top right) to drill into the linked Account Holder, Customer Account, etc.


Current Patient Record

This option is used to maintain an existing record, or simply to drill into related links to the Patient record.


Whenever you have to select a Patient, the system presents the 'Locate Patient Record' wizard –

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Select Patient [2] (Save / Update : Active(ENG))



Select Patient



1: Use Fast Find

Patient

OR


2: Specify Patient Number

#

OR

3: Specify Patient ID number

#

Hint: For tips on using the 'fast find', please click on the image to the right ... 

To select the Patient record, please use any of the 3 methods offered on the left.

You can use 'fast find', or specify a known Patient number or Patient ID number to locate the correct Patient record.

Help for the 'fast find' function states the following: -

Patient retrieval may be done by means of the standard lookup or direct-type searching on multiple criteria: -

01) To use the standard lookup, press F2 or click the Lookup (dbl-click and choose Lookup).


02) To use an implicit multi-rule lookup, use a dot (.) and use any of the following: -

part_name.part_tel_no.part_address
 OR
 part_name..part_address
 OR
 part_name.part_tel_no
 OR
 ..part_address
 OR
 .part_tel_no.part_address
 OR
 .part_tel_no
 or
 part_name.

in other words, use any 1, 2 or 3 parts to search on, separated by dot(.) and where part of the family name, if specified, is always BEFORE the 1st dot, and the tel no always after the 1st dot but before the 2nd dot, and the address pattern, if present, is always after the 2nd dot.

Examples: -

a) finding by part name -

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SOUW.

which would find something like 'Rossouw'

b) finding by name and address -

rossouw..sunset boul

which would find 'rossouw' living on 'sunset boulevard'

c) finding by name, tel no and address -

osso.5553.sunset

which would find the same patient where the tel no includes '5553'

d) finding by address only -

..sunset

which would find patients living on 'sunset boulevard', 'sunset rd', etc.

IF NO DOT (.) IS USED, THEN THE INPUT DATA IS CONSIDERED TO BE THE TYPING OF THE PATIENT NAME, I.E. NO LOOKUP IS ENTERED.

Access Profiles

Access Profiles is quite a big subject in IES. Every User of the system has access profiles (menus) for each module he or she has access to. In addition, many modules also have additional 'business profiles' that describe other privileges in the selected module, and the Medical module has this also. This option enters the 'special privileges' profile for Medical.

Hint: For other Medical Menus and access rights to these, see the Access Profiles Manuals.

Access Profiles (Medical) [2] (Save / Update : Active(ENG))



Medical Profile



User / Operator Code

dm

Name

Data Manager

Close Consultation?

Consult Notes Access

3 Read ANY Update only OWN


Prescriptions

3 Read and Update

Lab Tests

3 Read and Update

Save

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Essentially, each User of the Medical module either has the right to close Consultations or does not have it. For Consultation Notes, Prescriptions and Lab Tests, all of which may be regarded as potentially sensitive or confidential information, each User has a privilege level – cannot see at all, may see but not update, may update 'own' or any ... (see the on-line help for more).

Titles

This is a typical Parameter Master File option. Each Patient and Account Holder is assigned a Title, but the title is not typed, i.e. it is selected by code only. This prevents the same thing from having multiple versions, like 'Mr' and 'Mister'.

Religions

The Patient's religion is often recorded (though optional), as religion can often have a bearing on treatment or allowed procedures. It is always useful information anyway. As for Titles, Religions are recorded by code and description.

Medical Aids

Medical Aids, when in use, require some address and contact detail to be specified. Below, we just show a portion of the Medical Aid Master File screen.

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 **Medical Aid Master Record** 

Medical Code: 01

Medical Aid Name Or Description: Westgen Medi

Postal Address: 624 Lora Dr.,
Memphis

Postal Zip: 2003

Tel/Fax(1): 555-0972

Fax:



Relation Types

Once again, similarly to Titles and Religions, Patient records indicate 'others' who may be contacted, and the relation type, e.g. Sister, Friend, Spouse, etc.

Doctors

Each Doctor in the Practice is recorded with a Code and the Doctor's name. If on-line prescriptions are performed, then the relevant header text for the Doctor, to be printed on Prescriptions, is also defined.

Define Doctor Code [2] (Save / Update : Active(ENG))

 **Doctors** 

Doctor Code: 01

Name: George Rossouw

For Prescription printing: -


Prescription Signatory: Dr G. Rossouw McBH

Practice Header: Dr G. Rossouw

Address Line: 274 Olmer Drive Ocean View 21H3

Contact Line: Tel 555-3244

The prescription fields are only used if the system will be used to print prescriptions for this Doctor.

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Laboratories, Lab Categories, Lab Tests

These options generally consist of a Key and a Description or Name, and are used with the Lab test functions. Quite often, a Practice will use only 1 Laboratory, but there can be many. The Lab Tests define the codes that may be used for requesting a Lab Test of a specific nature, and this list may be expanded all the time. The Categories are simply used to group the different Tests into groups, e.g. Blood Tests, Allergy Tests, etc.

Prescription Codes, Prescription Classes, Med Substances, Diagnosis Codes

Prescription Classes are the groups for Prescription Codes, the latter being the actual drugs or medicines that are prescribed.

Med Substances are locally defined for the practice and used primarily to indicate Patient allergies.

The Diagnosis Codes are also as defined for local needs, and are used to classify Consultations, by attaching 1 or more Diagnosis Codes to a Consultation. If this convention is followed, then the Statistical wizard can produce useful information about how many such and such cases were encountered in a specific period, etc.

Retail Catalog


The Retail Catalog option is not shown on the Medical Master File wizard, and is accessed in the Retail module from the File Maintenance options, but we discuss it here, because although it is documented in the Retail User Manuals, the screen takes on a different view when used in a Medical system, due to different capabilities offered in the Medical context.

Hint: The Retail Catalog is very important, since it includes all the standard Charges that are used on Patient Invoices.

Below, we show the 1st page of the Retail Catalog screen, and comment as follows.

Each Catalog Item has a Key or Code, and when this code is used on an Invoice, the charge is passed to the Invoice. (Hint: Of course, it is not necessary to know the code, you can simply type a part of the description for an auto search, or use the lookup ...). The Key is usually numeric, but alpha characters are allowed if you prefer. As such, you can use your own numbering system and introduce any items in your Catalog that you need.

The Description not only indicates what the item is, but is also passed on to the Invoice (or Statement). Therefore, if a 2nd language is used in the system for Invoices and Statements, it is a good idea to include the alternate language description as well, immediately below the English description. When an Invoice or Statement is processed, it will always show the English description on screen, but when the Invoice or Statement is printed or generated, and it is intended to be in the alternate language, then the 2nd language description will be used if it is indicated, and if not indicated, then the English is used.

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Medical Catalog [2] (Save / Update / Active(ENG))

1 Min | 2 Stores

MEDICAL CATALOG

DESCRIPTION

Category Key: 0132
 Master File: 0132
 Description: Consulting service, e.g. writing of repeat orders
 Price Unit: 4
 Descr (and language):

SETTINGS

Transaction Status: OPEN
 Tax Parameter: 1 Std. Output
 Unit Of Sale: EA Each
 Claim Code: 0132
 Claim from MedAid ?

PRICING and INCOME

Current Price:	100.00
Claim Price:	100.00
Price Unit:	4.00
Inc / Cost:	DOCT Consultation

CATALOG HIERARCHY

Use DCM Item:	
Group:	DEF Default
Sub Group:	DEF Default
Sub Sub Group:	DEF Default

Ratebook	Price	Claim Price
1 Private	100.00	
2 Medical Aid	100.00	90.00
3 Medical Insurance	100.00	85.00

Each Item MUST have a current Price, whereas the claim price and the price units are optional. If a claim price is not indicated, it is assumed to be the same as the Price, and if it is indicated, then the difference between the two is what is called 'excess'. In the case of Medical Aid claims, if the claim price is lower than the Price, then the Medical Aid will only pay the claim price, and the excess must then be collected from the Patient (or rather the Account Holder for the Patient).

Price Units are used to internationalise rates. For example, for all Catalog items where the 'price unit' is indicated, new prices can be automatically calculated whenever they increase (usually annually), based on the number of units, by simply specifying the latest financial value for 1 unit. In other words, a Consultation Session may be internationally classified as worth 4 units. In the USA, the unit value may be \$20, whereas in South Africa, the unit value may be ZAR25, therefore, the new price for the US Catalog would be \$80, and in South Africa it would be ZAR100. (Hint: The use of price units is optional, but beneficial for managing your Catalog. These standards are not applied in all countries.)

The Income / Cost of Sale indicator determines how the transactions are recorded as Income and Cost of Sale in the Financial system, and your standard codes are usually set up during implementation, but can be expanded as needed. (Hint: See the File Maintenance option called 'Income Ledger Routes' in Retail.)

The next item on the Catalog Item is called 'Ratebooks'. Ratebooks represent a method whereby different Patients (Customers) may be charged different prices for the same items. Ratebooks are defined from Retail, File Maintenance and once a Ratebook is defined a Customer or Patient Account can be linked to a Ratebook by specifying it on the Account Holder master record. After that, when that

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Ratebook appears with a price on a Charge Item in the Catalog, then that Patient is charged on the basis of that Ratebook rather than the standard price. On the Catalog Item therefore, any number of Ratebook prices can be indicated, and just as for the normal Price, a claim price may or may not be indicated.

Under the 'Settings' heading, we find the Transaction Status, Tax Parameter, Unit of Sale and Claim Code.

The Transaction status can be 'Open' or 'Closed'. When an Item is no longer used or allowed for charging, then the status is set to 'closed', which effectively prohibits it from being used on an Invoice. The reason for this, rather than deleting the Item from the Catalog is that the system may be full of historical Invoices where that same Item appears. As such, it is retained, but no longer transacted.

The Tax Parameter, of course, indicates to the system whether to charge Tax (e.g. VAT / PPN / GCT / GST) on the item, and what kind specifically.

The Unit of Sale indicates the Unit in which the Item is charged, e.g. 'each', 'box', 'dozen', etc.

Under the 'Catalog Hierarchy' we find fields for BOM (bill of materials), Swops, Groups, Sub Groups and Sub Sub Groups.


A BOM is a useful method for combining a number of separate Items into a single code. For example, when details of the constituent Items are required on the Invoice (often because the Medical Aid needs to see the Items being charged separately), then the Items can be defined as a BOM (Retail, File Maintenance). For example, let us suggest some vaccination item. Possibly, this charge consists of (a) performing the injection, (b) the syringe that is used and (c) the vaccination fluid itself. These 3 Items may be combined as a BOM code, which is then indicated on a Catalog Item, and when the Catalog Code is used on an Invoice, then the system automatically inserts 3 lines instead of 1 on the Invoice, listing each separate Item.

A 'swop' is always another Catalog code, and whenever the 1st code is used, and a swop is indicated, the system switches to the swop code and uses that. In other words, a swop can be used for superceding old codes, or even to call a different BOM.

The Groups, Sub and Sub Sub groups are really used to 'organize' the Catalog, and be able to report on it more easily in different ways. This is quite useful for large Catalogs, but in a small Catalog it is not very important, and in that case you can just use 'DEF', to indicate that you are not really using Groups to any significant extent.

The Retail Master has another 'page' to the screen, which we show below. This part indicates whether the Catalog Item is simply a Services Item or in fact Stock that is kept in Inventory. For Service Items, a "*" is indicated for the Store No, meaning that it is not really a physical Stock item. If it is Stock, then the Stores it may be traded from are listed.

Further, if it is actually Stock, a Bin Code may be indicated, and it is also possible to indicate that Stock Tracking is required. For example, medicines are commonly manufactured in 'batches' and stamped as such. If a batch is at any stage found

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mandatory Fields are satisfied, you may choose SAVE and then you have created a new Catalog Item.


All the Fields of the Retail Catalog (as for all screens in the system, in fact) have on-line help which may be initiated with F1, or clicking the Help icon, or clicking Icon Functions and choosing Help. You can also read more about managing your Catalog in the Retail User Manuals.

Enquiries

The Medical system also offers enquiry equivalents for most of the Update screens offered on the Master Files function. Enquiries are often used by Users who do not have access to the UPDATE options, i.e. are allowed to look at information without being allowed to change the information. In the Medical system, there is no specific menu for enquiries, but whenever a User chooses a Master File option to which he / she does not have UPDATE access, then the system will automatically offer an enquiry, i.e. if he / she has access to that.

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