CareOffice 2000 User's Guide

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Table of Contents

Table of Figures

Welcome to CareOffice 2000

Welcome to the CareOffice application. CareOffice is a powerful application that will help you keep your patient information up to date, schedule appointments, book examination rooms, find doctors when referrals are needed and perhaps most importantly bill medicare in a very efficient manner.

The CareOffice 2000 package

Here's what you'll find in the CareOffice 2000 package

A set of diskettes (or a CD-ROM) containing the application, the installer, and the program that runs the online help
Carefile CareOffice User's Guide
CareOffice Registration Card

About this Guide

This guide contains start-up instructions, step-by-step tutorials, and reference information with brief explanations of what every command and icon can do for you.

Conventions used in this manual

The CareOffice documentation uses the following conventions:

Italics are used when referring to chapters or sections in this manual.

Bold is used when referring to command you must issue the computer; for example **Double-click** on the Setup icon.

General Conventions

"Choose" when used in reference to commands means to carry out the command by clicking it with the mouse or by using keyboard equivalents — for example, the Del key used in place of the Delete command.

"Choose the **OK** button" means to click the OK button with the mouse or press the Enter key to carry out the action.

A dialog box is "enabled" when a check mark appears beside it, or its' button contains a black dot (blue on colour monitors). The absence of a check mark or black dot means the option is "disabled".

Mouse Conventions

CareOffice uses both mouse buttons. Each application assumes you have programmed the left mouse button as the primary mouse button. Whenever a procedure requires you to use the secondary mouse button, the documentation refers to it as the right mouse button. Single-click means to click the left mouse button once. Double-click means to click the left mouse button twice in rapid succession.

Keyboard Conventions

Carrying out commands or procedures with keys frequently involves pressing two or three keys - whether together or in succession. For example, Ctrl+P means to hold down the Ctrl key while pressing P, and Alt, C means to press the Alt key, and then release it, before pressing C.

"Arrow keys" or "cursor keys" are collective terms for the Up, Down, Left and Right Arrow keys.

For Explanations of Commands and Features

If you wonder what a command does or what some icon means, turn to the reference material in Chapter 8. Chapter 8, "Command Reference", provides details about each command on the menus. The menus appear in the same order as they do in the application.

How to Use the CareOffice99 Help System

You will notice that in many locations within the software simply moving the mouse arrow onto a symbol will cause a keyword indicating the use of the symbol below.

Chapter Overview

Starting Up gives instructions for registering your ownership, for installing the application and for everything else you need to do before you begin. The information here is relevant to all users.

Patients goes through the necessary steps to enter the relevant information for a new patient and the procedure of modifying an existing patient file, along with printing labels and envelopes and using the automatic dialer.

Doctors explains how to look up a doctor in the Doctor database using the various views, how to add new Doctors and edit an existing Doctor record in the database, along with printing labels and envelopes and using the automatic dialer.

Billing provides the user with a tutorial style look at the Billing procedure; covering both government and private billings.

Schedules instructs the user on how to use the appointment scheduler to book time for meeting or examination rooms, doctors and nurses if required.

Reports demonstrates how the various reports are produced and how they might be used.

Chapter 1

Starting Up

First Things First

What you will need

System Requirements

Registering with Carefile Medical Systems Inc.

When the Carefile representative installs your software on your system he/she will ensure that your license is registered with Carefile Medical Systems Inc. so you will receive new update notices, monthly newsletters, new product notices etc.

Making a Backup Copy

If your installation came on 3½ diskettes, then it's a good idea to make backups of the CareOffice 2000 software diskettes and keep the originals in a safe place.

To make a backup copy of the disks, follow these steps *for each one*:

1. Lock the CareOffice disk.
2. Insert the CareOffice disk into your disk drive.
3. Double left-click on the "**My Computer**" icon on the Windows Desktop.
4. Click on the 3½" Floppy [A:] icon.
5. Click on the **File** Menu and select "**Copy Disk…"**
6. In the Dialogue Box that is presented, click on "**3½" Floppy [A:]**" in the **Copy from** and **Copy to** boxes
7. Click on the **Start** button.
8. Insert a Blank Diskette when prompted. (It may ask you if you want to format the disk – if it does then do it.)

Installing CareOffice 2000

Installing CareOffice 2000 on your hard disk is easy — the CareOffice Setup program does everything for you. All you do is start the setup program and tell it where you would like it to install it to, i.e. which folder on which disk. The installer puts everything in its proper place on your hard disks.

1. From the Windows Desktop, insert Disk 1 of the CareOffice installation diskettes into the floppy drive and double click on **My Computer**. You will see a window similar to the illustration below.

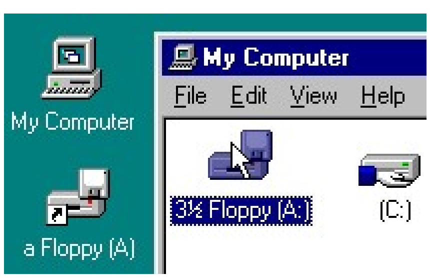


Figure 1 — Find the floppy drive on your desktop

2. Find the icon labelled **3½ Floppy [A:]** in the **My Computer** window and double-click it to open it.
3. Double click on the program file called **Setup.exe** which is located in the window of the 3½" floppy.

Figure 2 — Find the Setup program

4. Setup will guide you through the rest of the steps. When asked where to install the program icons select the Programs folder in the **Start** Menu. When the installation is complete you will need to define the user characteristics with the **CareUser** software.
5. If your installation came on a CD-ROM, then the above still applies but your drive letter will be different (use your CD-ROM's drive letter) and there is only one disk to process.

Defining User Characteristics

Now that the software has been installed we need to define who the users of CareOffice will be, which privileges they will have, which accounts they will bill from etc…These tasks are performed using **CareUser**.

1. From the Windows desktop **click** on **Start**. You will see menus similar to the following illustration.

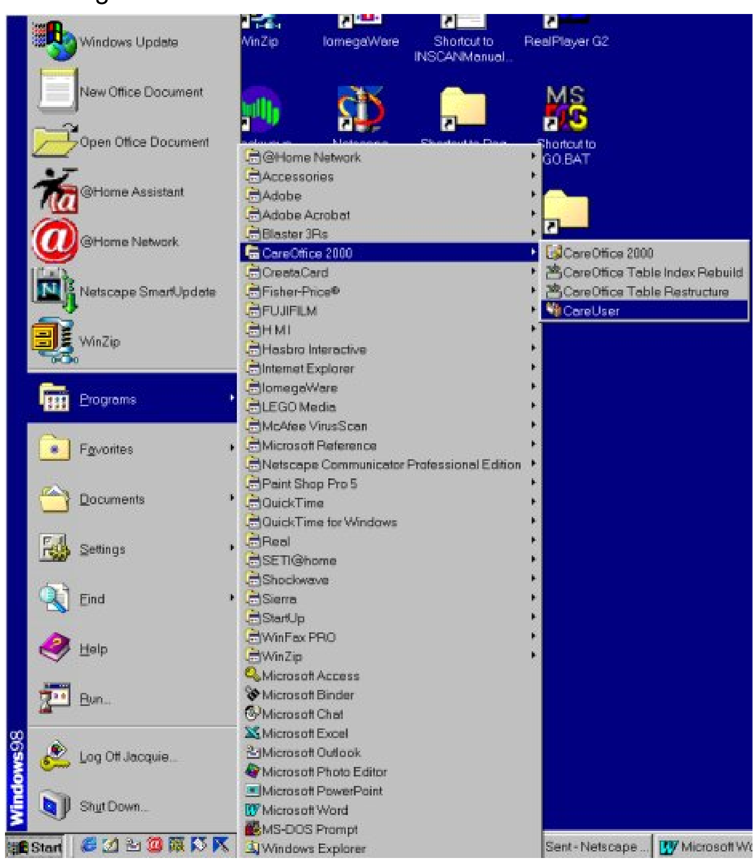


Figure 3 — Start Menu Options

2. Select the **CareUser** program as shown above. You will see a window open similar to the following. CareOffice has been set up with an example user. Take a look at the user characteristics by clicking on the tabs labelled **User Defaults**, **Billing Setup**, **E-Mail Setup** and **Miscellaneous**.

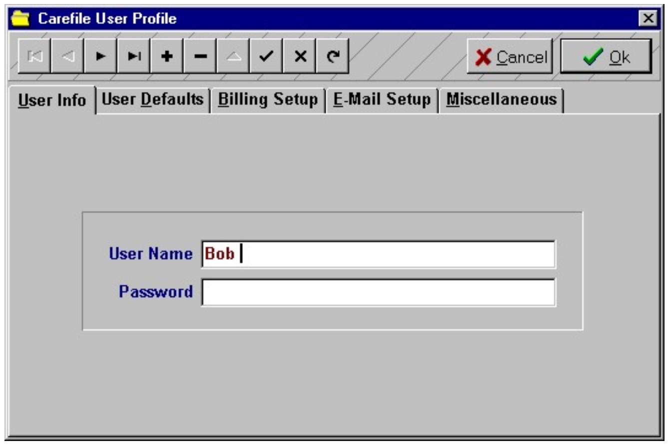


Figure 4 — Carefile User Profile – User Info

3. With the **User Info** tab selected **click** on the **+** button to add a new user. The **I** Bar will be blinking in the **User Name** entry area.
4. Type in the **User Name**. It can have up to 30 characters. (You may include letters, numbers, symbols, spaces and punctuation marks – the full ASCII character set - in the **User Name** if you wish.)
5. Type in the **Password** to be used. The password can be up to 10 characters in length and again the full ASCII set of characters may be used. Note that the password is Case sensitive. You must use it the same way as it was typed, i.e. UPPER CASE or lower case or Both. Notice that for security reasons the password is not displayed onscreen but is instead represented by *'s.
6. **Click** on the **User Defaults** tab. You will see a window similar to the following.

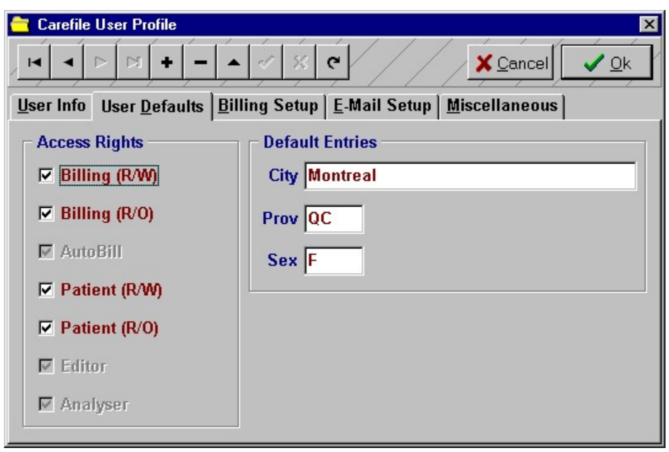


Figure 5 — Carefile User Profile – User Defaults

This is where we will set up the Access Rights and Default Entries of the users. You will notice that the Access Rights are divided into 2 categories; billing and patient. For example you can set up your accountant to have Billing (R/W) , that is Read and Write, privileges by clicking in the box next it and Patient (R/O) so he/she can do the billing but also see the patient information if necessary. You may want to assign the secretary and nurses with Billing (R/O) or Read Only privileges so they can see the billing information and with Patient (R/W) privileges so they can enter or edit new patient information, book appointments etc…

You will also note that there are some Access Rights, which have been greyed out, which are not selectable. These are for future releases of CareOffice software.

7. Assign the appropriate privileges to the new user by clicking on the radio button next to the privilege(s).

   The **Default Entries**; **City**, **Prov** and **Sex** are timesavers if most of your patients are from the same city, province and are of the same sex. When entering patient information the information you insert into the text boxes next to these defaults will be automatically inserted into the patient record. The city, province and sex of the patient on the patient record will of course be editable if necessary.

8. **Click** on **City** and enter the default city of your choice then press the Tab key to go to the remaining fields and enter the default province and sex. Note: CareOffice does not require you to enter anything in these default fields if you prefer not to.

9. **Click** on the **Billing Setup** tab. A window similar to the following will open.

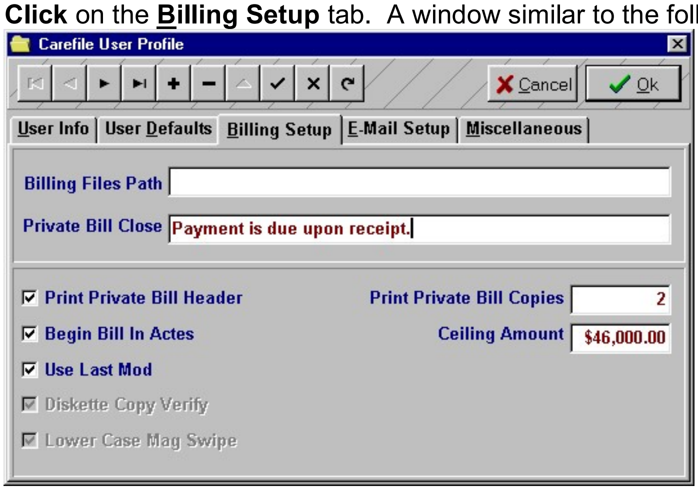


Figure 6 — Carefile User Profile – Billing Setup

10. Move through the fields by pressing on the **Tab** key and inserting the correct information. If you find a need at some time to change any of these defaults the following explains what each field represents.

    Billing Files Path – This tells the software where on your hard disk(s) to find the Billing Files. CareOffice will by default store these files in the CareOffice 2000/Data directory. If you wish to change this you must include the entire path to the data files, i.e. D:\Dr.Rousko\Bills

    Private Bill Close – Whatever is in this text box will be printed at the bottom of all the private bills you prepare.

Print Private Bill Header – If you are not using your own pre-printed stationary with the practice's name, address etc… on the top you may want CareOffice to create a header for you. If so, check this box.
Begin Bill in Actes – There are two parts of the Regie bill; Actes and Visits. If you would like to have the bill start with the Actes at the top of the bill then check this box.

Use Last Mod – Modifiers may be used in conjunction with certain billing codes. If in your practice you are often using the same modifiers you may want to specify here that the last used modifier be applied to the next billing code you use. If so, check this box.

Diskette Copy Verify – Not available in this version of CareOffice.

Lower Case Mag Swipe – Not available in this version of CareOffice.

Print Private Bill Copies – If you require only 1 printed copy of the bill you would place a 1 in this box. If however you want to print a copy for the patient and a copy for your files then you must specify 2 here. Please note that if 0 is entered then you can generate private bills without the bill being printed.

Ceiling Amount – The ceiling amount is the maximum the doctor for whom you are billing, can bill the government within a trimester. This amount is dictated by the government is frequently changed. You can run the Projection Ceiling Report to estimate when you will reach this ceiling amount.

11. Next **click** on the **E-Mail Setup** tab. A window similar to the following will appear.

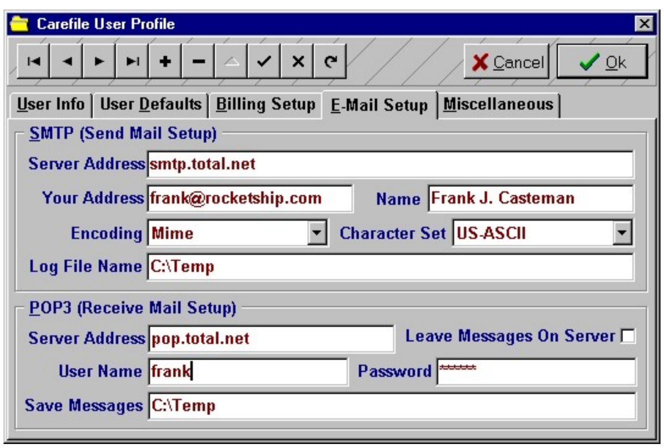


Figure 7 — Carefile User Profile – E-Mail Setup

Complete this screen according to the information your Internet provider gives to you. Note that CareOffice will automatically use your regular e-mail program by default if one is installed. If you do not have one installed, then CareOffice will use its own built-in e-mail program. Only in this case do you have to enter this e-mail information.

12. Finally **click** on the **Miscellaneous** tab to complete the information there. The window will look similar to the following figure.

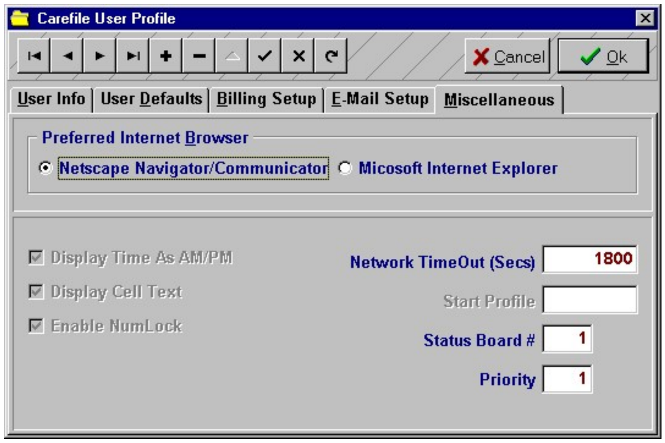


Figure 8 — Carefile User Profile – Miscellaneous

You can choose your Preferred Internet Browser by clicking on the radio button next to Netscape Navigator or Microsoft Internet Explorer. Tab to the other fields to complete the information that your Internet provides.

13. Click on the **Post Edit** button –  – to save changes. If you need to create more than 1 user click on **User Info** and press  to create another user.
14. Click **OK** to finish and save all changes.

CareOffice 2000 Files

CareOffice will install the files needed in a location directed during the installation process. To make backing up easier and quicker, the data files contained in the user folder should be in a different location than the program files.

Starting the Application

1. From the Windows desktop click on **Start**. You will see a cascading menu similar to the following illustration.

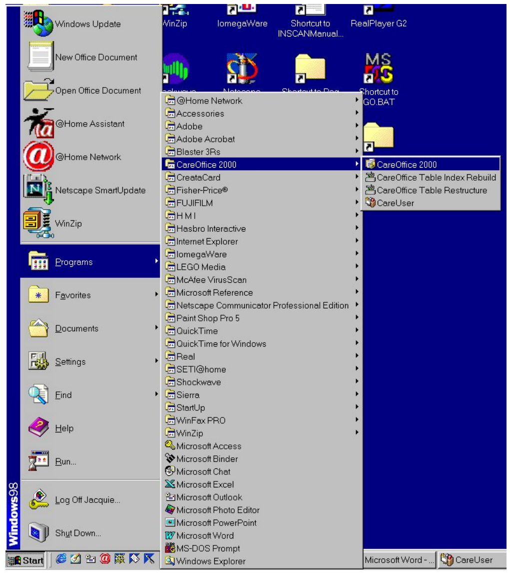


Figure 9 — Launching CareOffice 2000

2. Highlight **CareOffice 2000** as shown in the illustration above and then release the mouse button. You will see a message indicating that CareOffice 2000 is loading, please wait and then you will be presented with the **Billing Accounts** dialogue box.
3. You will see the following dialogue box allowing you to select the billing account(s) you have access to.

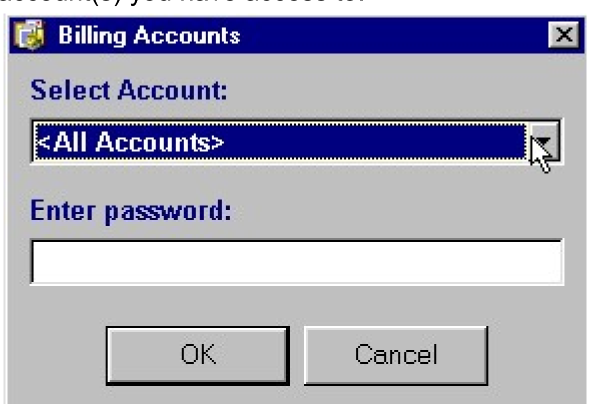


Figure 10 — Billing Account, Select Account

If you have authorisation to access all the billing accounts, press the **Tab** key, enter in your password and click on the **OK** button.

If you don't have authorisation to access all the billing accounts, click on the down arrow next to **Select Account**, highlight the account you will be working with and then press the **Tab** key to enter in your password and click on the **OK** button.

When CareOffice 2000 was installed on your system, the Carefile representative set up the Billing Accounts for you. Your license depends upon how many doctors you will be billing for or how many billing accounts you will need. If more physicians need to be added to your facility in the future, you may contact Carefile to have your license upgraded to include billing accounts for each of the additional doctors. It is important to note that a doctor may be a part of several different billing groups depending on how your clinic or practice is run.

If you need to change the **Billing Account** you are working with to another you can do so within the CareOffice software.

1. From the menu bar at the top of the screen click and hold **Tables**.
2. Highlight **Select Accounts**, as shown in the illustration below, and release the mouse button

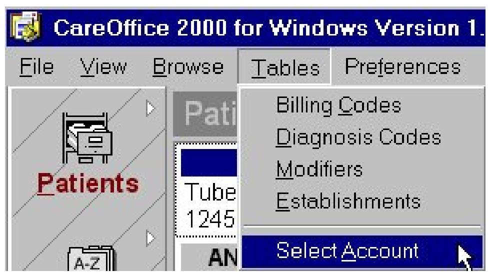


Figure 11 — Tables, Select Account

3. You will see the same **Billing Accounts** dialogue as in the illustration above. Click on the down arrow next to **Select Account,** highlight the account you now want to work with and then press the **Tab** key to enter in your password and click on the **OK** button.

You are now ready to begin work with CareOffice 2000 and will be presented with the CareOffice main desktop.

If you would like CareOffice to start up automatically each time you turn on your computer follow the instructions in Windows Help. To access **Windows Help** do the following

1. Click on **Start** at the bottom left of the Windows desktop
2. Click on **Tips and Tricks**
3. Click on **For Running Programs**
4. Click on **Having a program start when you start Windows**

The CareOffice Main Desktop

The CareOffice main desktop is the first screen you will see. From the CareOffice main desktop you can access all the modules of CareOffice. The following illustration has been labelled to present to you some of the terminology that will be used throughout this manual.

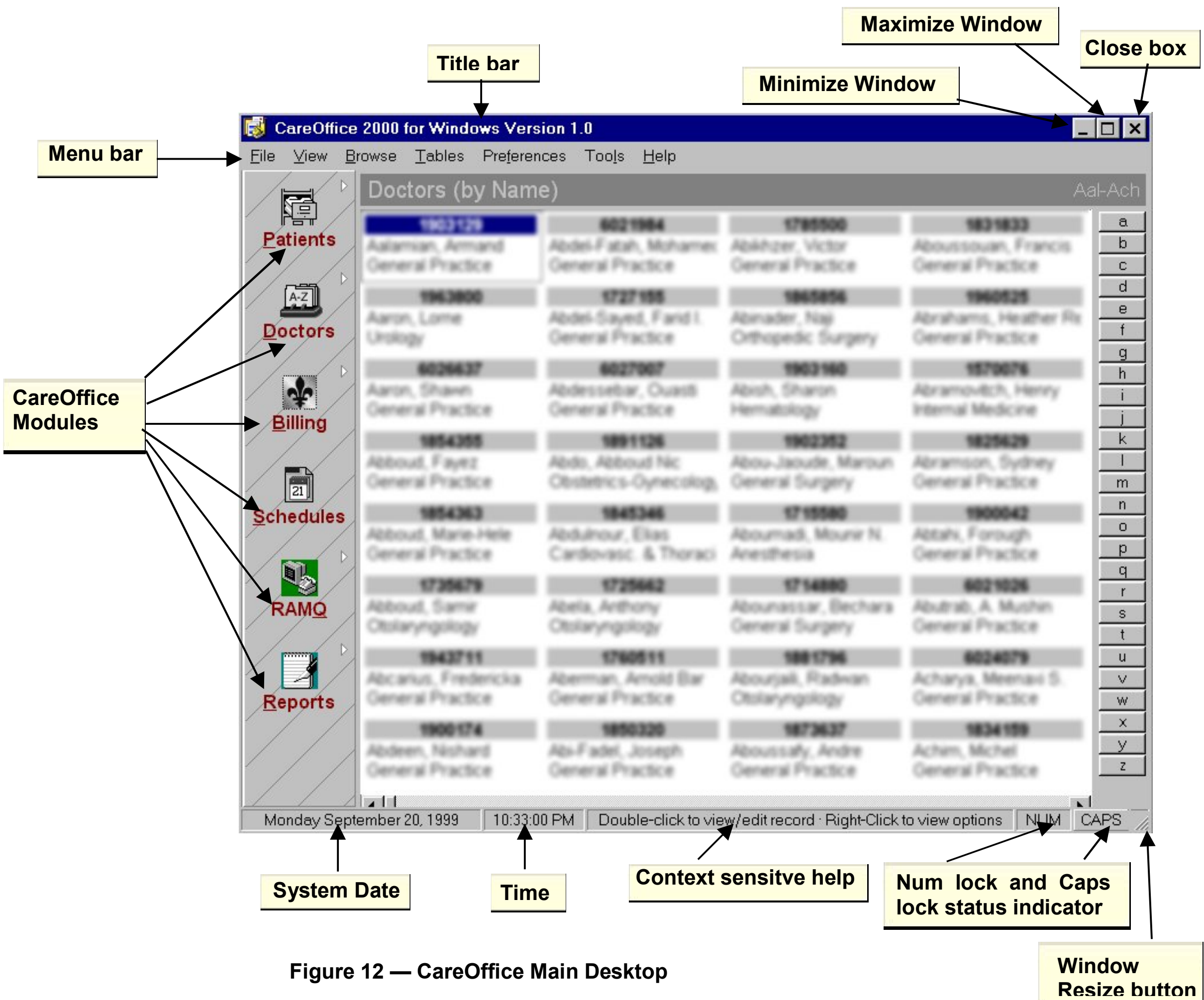


Figure 12 — CareOffice Main Desktop

Chapter 2

Patients

Patients Module Overview

The **Patients** module is used to input new patient information and update the existing patient records. CareOffice allows you to keep track of pertinent patient information such as their address, birth date, special notes and cautions, insurance information, their Medical Record Number (MRN) and attending physician to name a few. The Patients Module of CareOffice will allow you to search through your patient database in several ways to make it easier to find the patient information you are looking for. This module will allow you to create a new bill for office procedures or office visits and the necessary patient information will be automatically put into the RAMQ or private bill saving you time. It also has the time saving ability of printing Labels and Envelopes

Sorting the Patient Database

There are four different fields you can sort the patient database on if you choose to **View** the patient database:

1. By RAMQ Number
2. By Last Name
3. By Married Name
4. By MRN Number

When the patient database is sorted by RAMQ Number the patients' RAMQ numbers are sorted alphabetically and then numerically. For example: the patient with RAMQ number CASF-5202-0302 will appear before CASM-5202-0301. The same sort is carried out if you select to search by MRN (Medical Records Number).

If you select to view by Married or Last Name the patient data is sorted by Married or Last Name and then by first name.

Note that the system is smart enough to remember your current sort selection and will default to that field the next time you run CareOffice.

How to View the Patient Database

You can select to view the Patient Database in a number of different ways, by clicking on the **Patients** icon or by choosing **View** from the menu bar.

Click on the **Patients** icon on the left side of the CareOffice desktop. (You'll notice that the icon changes colour to indicate that it has been selected.)

You will see a cascading menu as shown in the following figure.

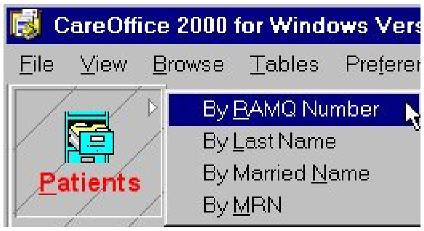


Figure 13 — Patients cascading menu

You can access the same sorting options by clicking on View on the menu bar at the top of the screen and highlighting patients. A cascading menu will appear with the same options.

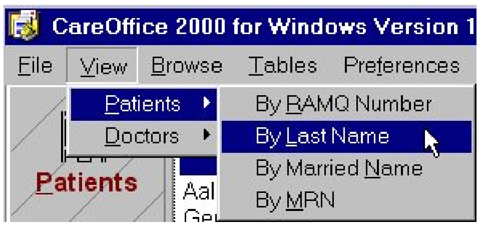


Figure 14 — View Patients by Last Name

Once you have the cascading menu, select the sorting method you wish to implement by highlighting the sort option and then clicking on it. (The sort may take a few minutes depending on the capabilities of your computer, how many other applications you have running at the time and how large your patient database is.)

The patient information displayed contains the patient’s RAMQ number, last name, first name and finally their MRN number.

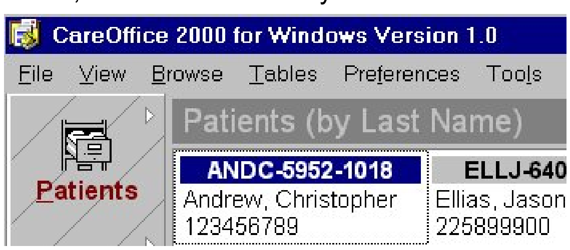


Figure 15 — View Patients (by Last Name)

Moving through the Sorted Patient Database

Once you’ve sorted through the Patients Database you can use any of the four ways following to view a group of patients.

1. Click on any of the alphabetised tabs to the right of the sorted patients record to see the patients whose last name begins with the letter on the tab selected. The first patient found will be highlighted.
2. Click on the right or left arrow on the scroll bar at the bottom of the screen to move through the patient data one column at a time.

3. Click on the light grey space on the scroll bar to move through the patient data one screen at a time
4. Drag the scroll bar to move several screens at once.
5. Use the AutoSearch feature.
   a) Click on the Patients Browser on the CareOffice desktop
   b) Select any of the available views
   c) Start typing the patient's name, MRN number or Insurance number. You will see the search criteria you've typed appear as in the following illustration

Figure 16 — AutoSearch Feature

Whatever you've typed will appear after **Find:**. As soon as you pause CareOffice will move to the first name in the database containing the search criteria and will highlight that name.

Note: By default, The AutoSearch feature is enabled. If you prefer, you can turn it off via the Preferences -> AutoSearch option. If you turn it off, then you must press Enter after you finish typing to activate the search.

The illustration below shows the locations of the tabs, arrows and etc…

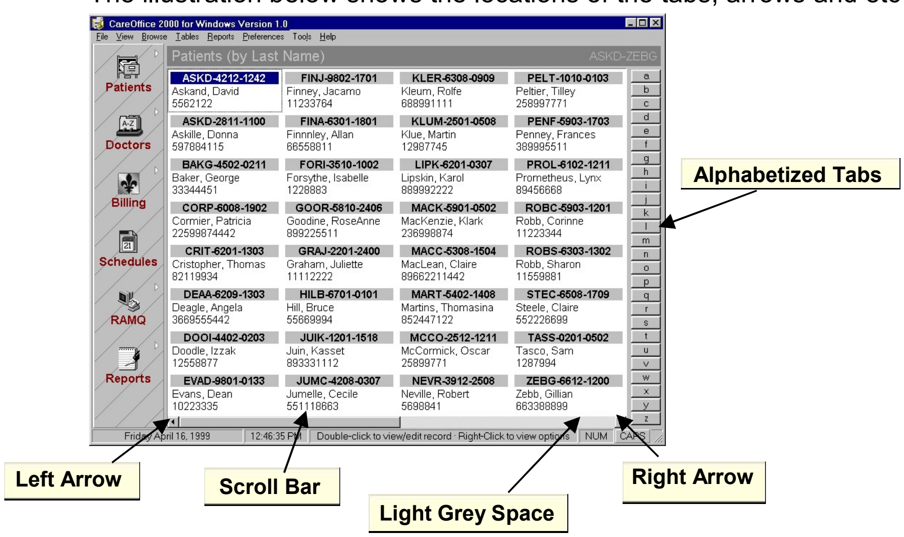


Figure 17 — Location of tabs, arrows etc… on Main Desktop

Viewing a Patient Record

When you have the sorted database and wish to view a patient's record you need only double left click on the **Patient Information Box**.

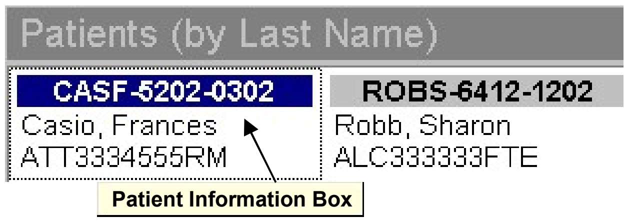


Figure 18 — Patient Information Box

Browsing the Patient Database

The **Browse** menu option may be used to very quickly find a patient's record. It allows you to sort the database or to search through the fields in a database

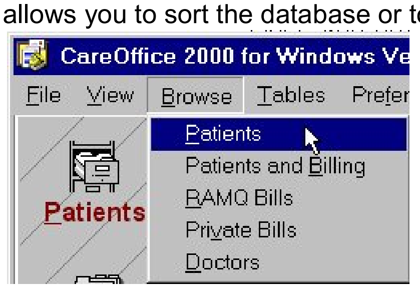


Figure 19 — Browse, Patients

Once you have clicked on **Browse** and selected **Patients** as in the figure above you will see a window similar to the following illustration.

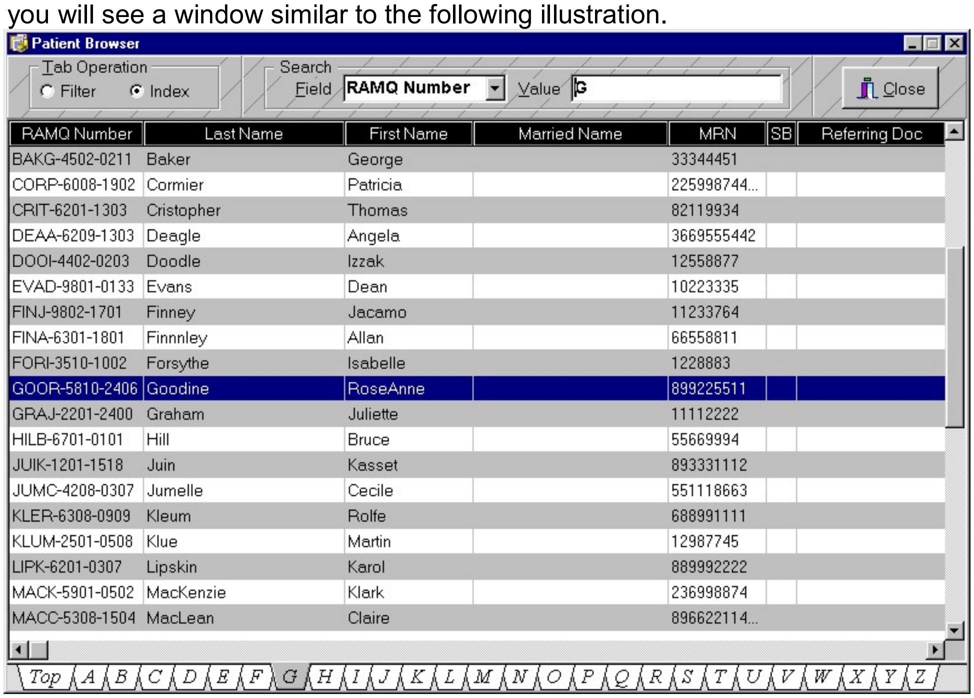


Figure 20 — Patient Browser

There are five different ways to browse through the patient database:

1. RAMQ Number
2. Last Name
3. Married Name
4. MRN
5. Status Board

Note that the 'Status Board' index is for future use only.

Toward the centre of the Patient Browser window you will see an area labelled **Search**. When searching for a particular patient you will need to tell the Browse tool which field in the database you want it to look at and the value of that field you are searching for. If you click on the down area beside **Field,** you will see the following pop-down menu.

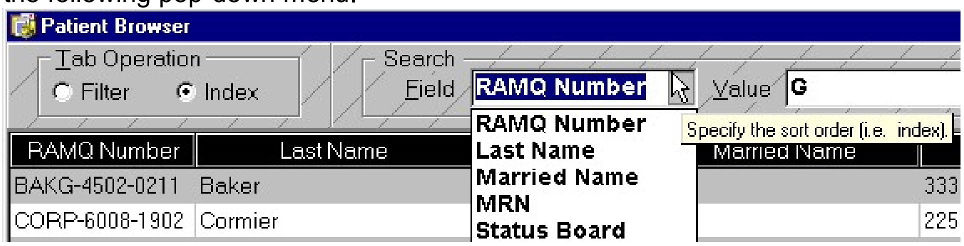


Figure 21 — Search Fields in Patient Browser

The white box next to **Value** is where you tell the Browse tool the value of the Field it should look for.

For example:

You would like to find a patient whose married name is Dionne and whose Last Name is Tubetti.

Left Click on **Field** and without letting go of the mouse button
Select **Last Name**

Notice that the I bar cursor is blinking in the text insertion box to the right of **Value.**

Type "Dionne" in the **Value** insertion box

The Patient Demographics Screen

The snapshot below is the Patient Demographics screen that you will use to Input new patient information, update existing information and bill the patient for services rendered.

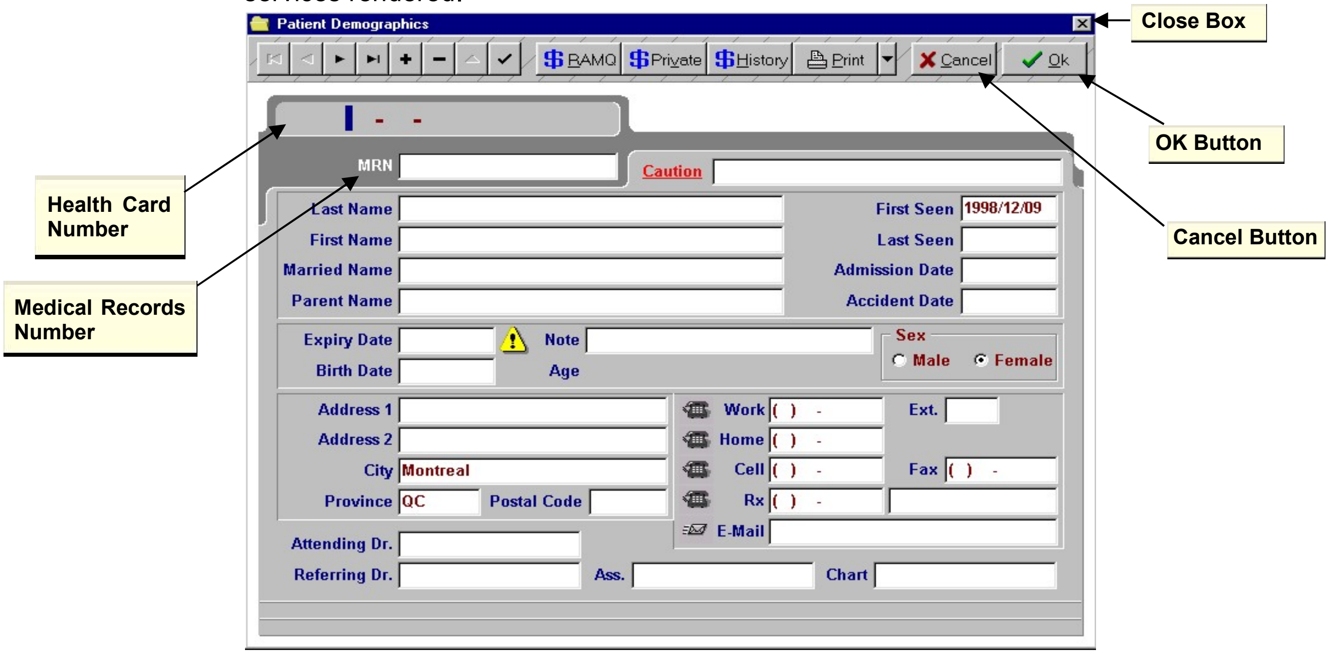
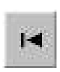


Figure 22 — Patient Demographics screen

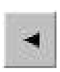
Most of the fields on the Patients Demographics screen are self-explanatory but there are some buttons at the top of the screen, which need some explanation.

If you simply position your mouse pointer over any of the buttons a little yellow box with a word or two of text will tell you what the button is used for. The following briefly defines these buttons and their uses:

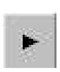
N.B. The order of the patients in the database depends on the view you have selected or how the database has been sorted.



First Record – Pressing this button will show you the first record of the patient database.

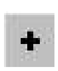


Prior Record – Pressing this button will show you the previous record in the patient database.



Next Record – Pressing this button will show you the next record in the patient database.

Last Record – Pressing this button will show you the Last Record in the patient database.



Insert Record – If you click on this button while editing a new or existing patient record it will be assumed that you want to save your changes and a new record will be inserted

Delete Record – Clicking on this button will cause the record currently on screen to be deleted from the patient database. You will be asked to confirm that you want to delete the current record on screen if you press this button.

Edit Record – Clicking on this button will allow you to edit the record displayed.

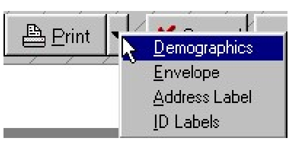
Post Edit saves the changes made in Edit mode to the current record. At this point, you can proceed to make other changes to the database but the data is not actually written to disk until you click on the form's OK button. This allows you to perform a number of transactions together and then save them all to disk at the same time.

*N.B. Pressing Alt and the underlined letter seen on the button can alternatively access the following options. For example: to go to the RAMQ Billing Screen simply pressing the **Alt** key on your keyboard and then **r**.*

$RAMQ brings you to the RAMQ Billing Screen, filling in the demographics for the patient being viewed automatically for the bill creation.

$Private brings you to the Private Billing Screen, filling in the demographics for the patient being viewed automatically for the bill creation.

$History will show you the billing History of both RAMQ and Private Bills which have been invoiced for the particular patient you were viewing before clicking on this button.



If you click on the **Print** button the Patient Demographic screen will be printed on your default printer. You may alternatively click on the down arrow to the right of the Print button to make the choice of printing the patient's **Demographics**, **Envelope, Address Labels** or **ID Labels**.

Clicking on the **OK** button will save to disk all the changes you've made while in the **Patient Demographics** screen and exit.

Clicking on **Cancel** will exit the **Patient Demographics** screen without saving any changes made.

Adding New Patient Records

It is very simple to add a new patient to the patients database if you have the necessary privileges. If your user account has not been set up with Patient Read and Write permissions contact your system administrator. When in the CareOffice main desktop, click on the **File** menu at the top of the screen.

You will see the following menu:

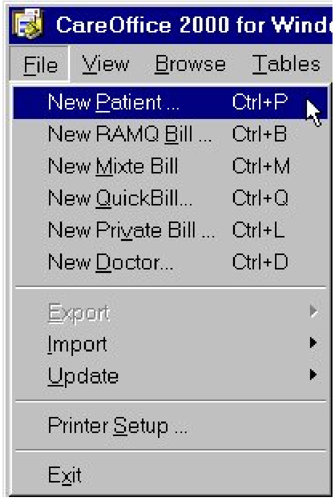


Figure 23 — File, New Patient

Without letting go of the mouse button select **New Patient** and then release the mouse button.

You can also use the Hot Key **Ctrl+P** to access the **Patient Demographics** screen.

Alternatively if you have the Patients Module selected and are viewing the database you can right click on any of the patient records or in the white space around them to access the **New Patient** option.

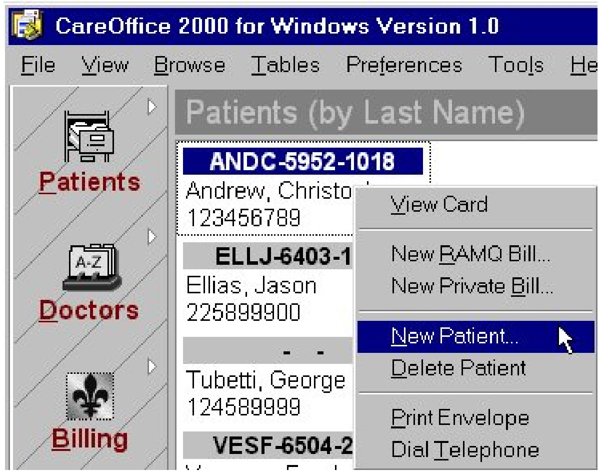


Figure 24 — New Patient

Below is a snapshot of the **Patient Demographics** screen that will appear when you select **New Patient…**

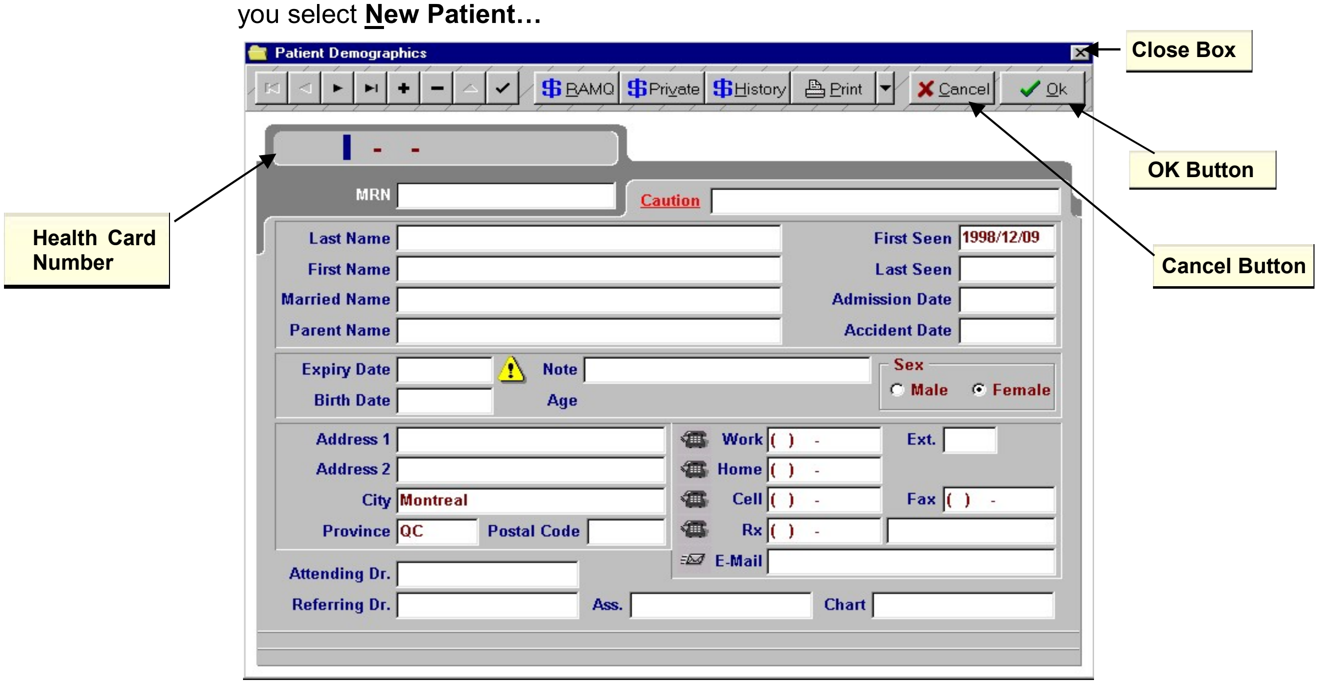


Figure 25 — Patient Demographics screen

The blinking I bar on the tab of the patient record is the field for the Medicare (Provincial Health) number. If the patient has a Medicare number, type in the patient's number and CareOffice will check that it is a valid number. The program validates that the first 3 characters of the RAMQ number match the first three characters of the patient's last name. It also checks that the 4th character of the RAM number matches the 1st character of the patient's first name. The sex of the patient is automatically extracted from the RAMQ number. If the date of birth extracted indicates a patient age of 100 years or older, a warning is issued.

It is interesting to note how the government of Quebec assigns RAMQ numbers. The first three letters are the first three letters of the patient's last name. The next letter is the first letter of the patient's first name. The next two digits represent the year in which the patient was born. The following two digits represent the month the patient was born (plus 50 if the patient is female). The next two digits represent the day of the month the patient was born. The last 2 digits are derived from a mathematical calculation the Regie uses to validate the RAMQ number.

If the birth date isn't valid an error message will appear similar to the following.

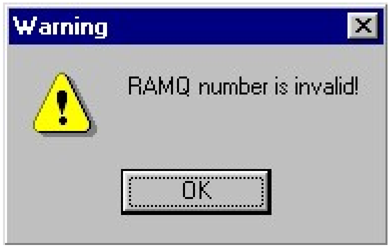


Figure 26 — Warning Dialogue

Click on the **OK** button to make the Warning dialogue go away. Type in a valid Medicare number or press the delete key to erase the Medicare number if the patient does not have a valid number. You can then tab through the various fields to input the information you have on the patient.

If CareOffice has accepted the Medicare number, you will notice that a few fields in the Patient Demographic screen have been filled in for you. The first three letters of the patient's last name and the first letter of the patient's first name are part of their Medicare number so this information has been inserted automatically. Within the Medicare number is information regarding the patient's date of birth and their sex. This information is automatically inserted and their age is calculated and displayed. The date **First Seen** takes on today's date and may not be changed. The **City**, **Province** and **Sex** have been filled in according to the **User Defaults** set up in the **Carefile User Profile**. For more about the **Carefile User Profile** see *Chapter 1 – Starting Up*.

To save the new patient information you must click on the **OK** button at the top of the screen. If you click on the **Post Edit** button you can add another patient record and then click on the **OK** button when you've finished adding new patients. When you click on the **OK** button, CareOffice will save all the changes to all the records you have accessed or added while in this Patient Information session and you will be brought back to the main screen. If you click on the **Cancel** button or the **Close box** you will see the following Dialogue

Figure 27 — Confirm loss of changes

Or you will see this message

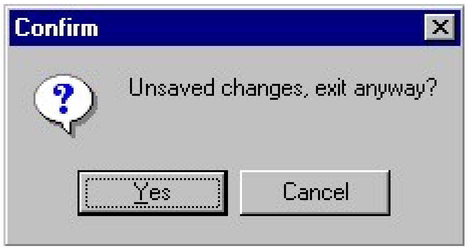


Figure 28 — Confirm exit

Click on the **Yes** button to lose all your changes to the Patient Information database and exit the **Patient Demographics** screen or click on the **Cancel** button to go back to the **Patient Demographics** screen.

Editing Existing Patient Records

To edit a patient's record you must have the Patient Demographics window displayed. You can get there in a number of different ways.

1. Click on the **Patients** icon on the CareOffice desktop and select any of the views available.

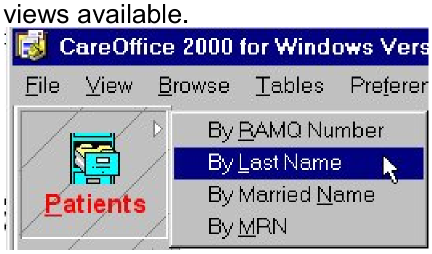


Figure 29 — Viewing Patients on the desktop

2. Click on **View** on the menu bar at the top of the CareOffice desktop and select **Patients** and then choose one of the views.

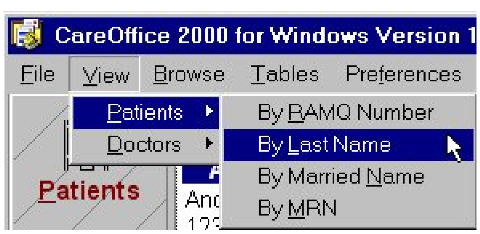


Figure 30 — View, Patients, By Last Name

3. Click on **Browse** on the menu bar at the top of the CareOffice desktop and then select **Patients** from the pop-down menu.

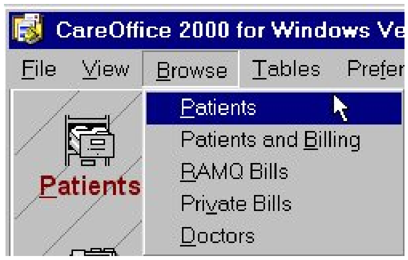


Figure 31 — Browse, Patients

After you have found the patient using either the Patient Browser or the Patient View screen you can double click anywhere on the information displayed about that patient and CareOffice will bring you directly to the **Patient Demographics** window in edit mode.

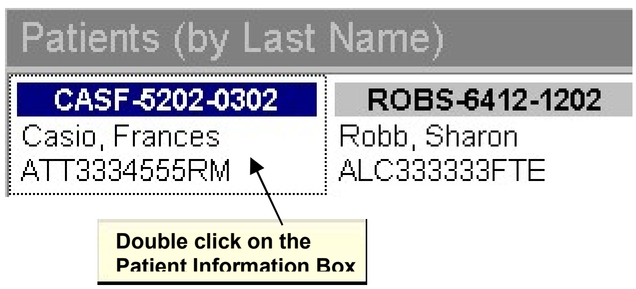


Figure 32 — Patient Information box on desktop

Or

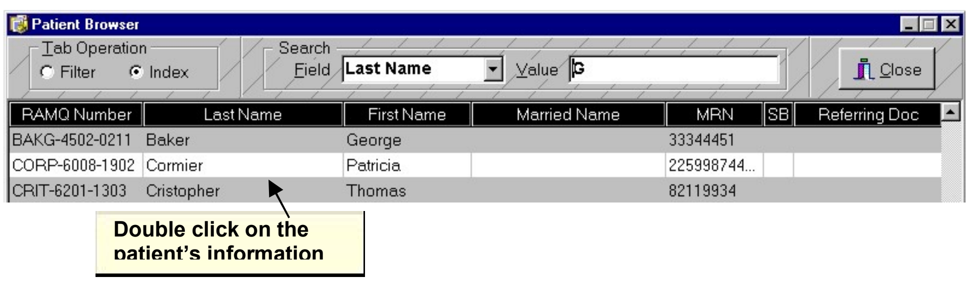


Figure 33 — Getting to Patient Demographics screen

Alternatively if you're using the **Patient Browser** you can right click on the patient's information and select **Edit** as shown below.

Figure 34 — Right click and select Edit

The **Patient Demographics** screen looks like the following illustration:

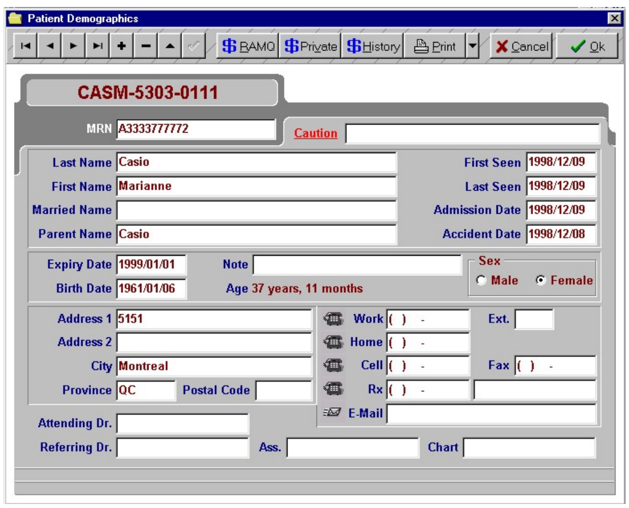


Figure 35 — Patient Demographics screen

Once you have the **Patient Demographics** screen displayed you can either;

Highlight a field and then type over the field contends to change the information displayed,
or
Press on the Tab key until you've reached the field to edit and then type over the contents to change the information displayed.

When inputting the name of either the **Attending Dr.** or **Referring Dr.** you can double click on the input area next to these fields and CareOffice will bring up the **Doctor Browser**. Find the Doctor involved and double click on his record and his name will be automatically placed in the **Attending Dr.** or **Referring Dr.** fields.

To save the changes you have made click on the **OK** button on the top right corner of the screen.

If there are other patient records that you would like to edit or view before exiting the **Patient Demographics** screen click, simply double-click on the patient record or you can use the arrow buttons to go to another patient's record. When you are finished editing the Patient record you must click on the **OK** button to have the changes you made in the edit session written to disk.

Deleting a Patient Record

Before you follow this procedure be sure you really do want to delete the patient's information, as it will be irretrievable after you confirm the delete process. Note that if there are any RAMQ or private billing claim records attached to the patient you wish to delete, the system will not allow you to delete the patient record. You must first manually delete all of the patient's billing records before you can delete the patient record.

You can delete a patient's record or file from the following program locations:
CareOffice Desktop
Patient Demographics Window
Patient Browser

CareOffice Desktop

While viewing the patient database from the CareOffice desktop you can right click on the patients information box and select **Delete Patient** from the cascading menu. In the illustration below, David Askand's record would be deleted.

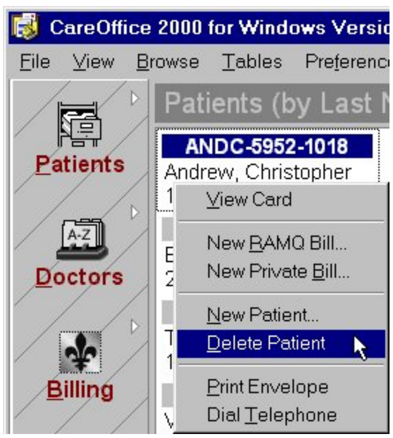


Figure 36 — Delete Patient from desktop

You will receive the following message asking you to confirm your action.

Figure 37 — Confirm deletion

Patient Demographics Window

While in the **Patient Demographics** window you can click on the delete button to delete the patient information onscreen.

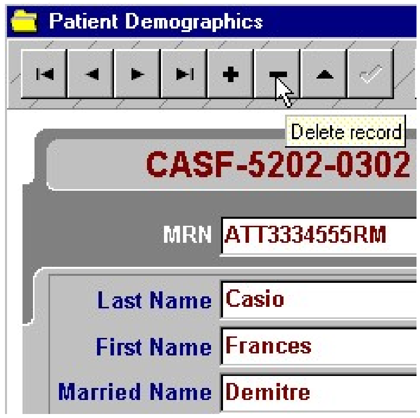


Figure 38 — Delete Record in Patient Demographics

You will be asked to confirm the deletion.

Figure 39 — Confirm deletion

If you click on the **Cancel** button the record will not be deleted.

If you click on the **OK** button the record will be deleted but the changes will not be written to disk until you have exited the **Patient Demographics** window by clicking on the **OK** box on the top right hand corner of the **Patient Demographic** screen. N.B. You will not be asked to confirm your changes when you click on the **OK** box.

If you click on the **Cancel** box beside the **OK** box none of the changes you requested since entering the **Patient Demographics** window will be written to disk and you will receive the following message:

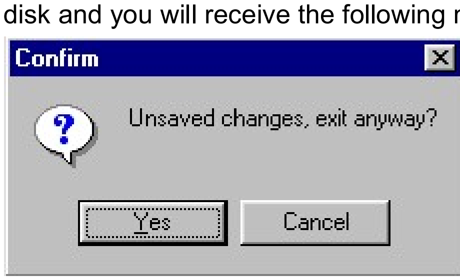


Figure 40 — Confirm exit

Patient Browser

You can also delete a patient's file while in the Patient Browser window. Simply right click anywhere on the Patient information and select **Delete** as shown below.

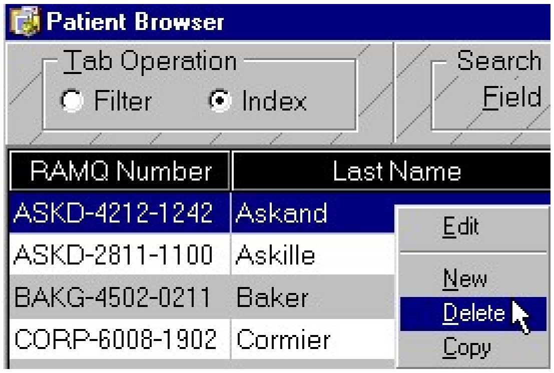


Figure 41 — Delete patient's record from Patient Browser

You will be asked only once to confirm your action. You will see the following message:

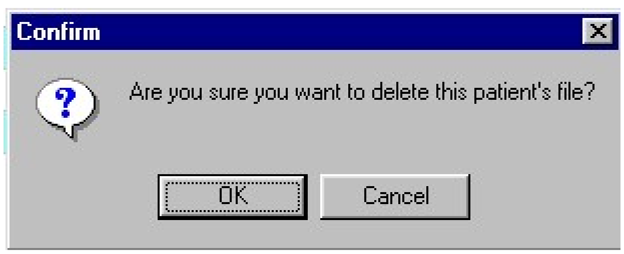


Figure 42 — Confirm deletion

If you click on the **OK** button, the patient's file will be deleted and the change to the database will be immediately written to disk. If you click on **Cancel,** no change to the patient database will be made.

The Patient Card

The **Patient Card** is a quick way to see some basic information about a particular patient.

View Patient Card

While in the patient's view mode right click on the patient's information and you will see the following cascading menu.

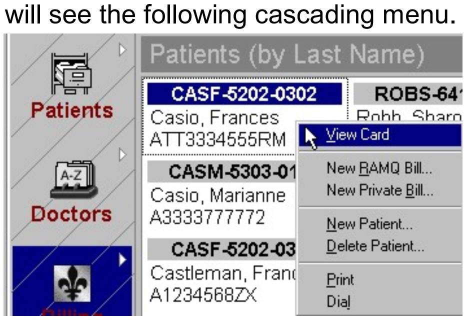


Figure 43 — View Card

Select **View Card** and a patient card similar to the following will appear.

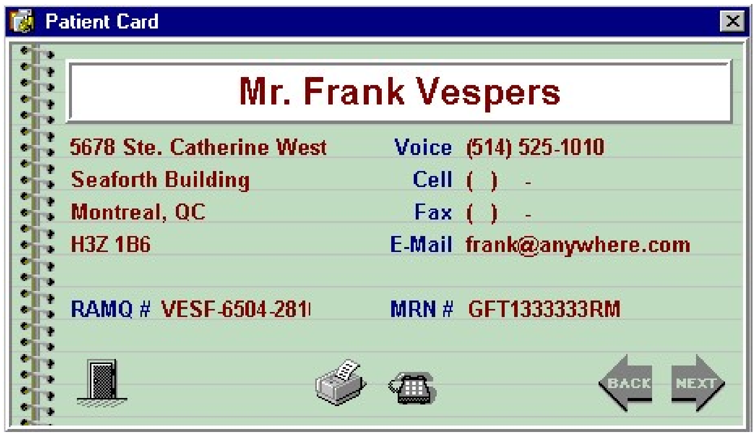


Figure 44 — View Patient Card

Viewing Other Patient Cards

On the bottom right of the **Patient Card** you see two arrows labelled **Back** and **Next.** You can click on these arrow buttons to scroll through the patient database and look at the cards of other patients.

Dialing the Patient

From the **Patient Card** you can click on the telephone icon and CareOffice will automatically dial the patient whose card is displayed, if your modem and telephone have been connected properly. You will then see the following message:

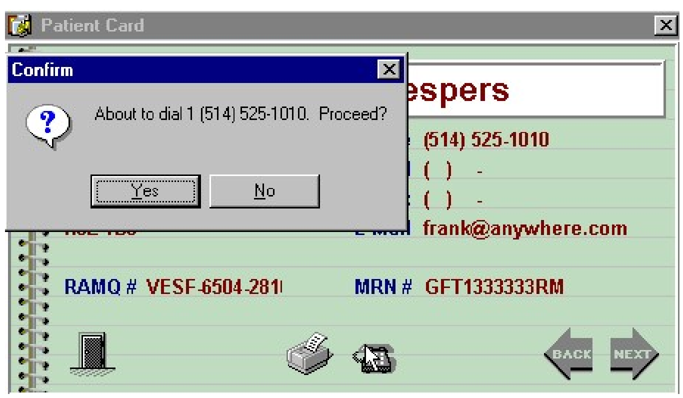


Figure 45 — Confirm dialing number

If you don't want dial the number shown in the Confirm dialogue box then click on **No** and you'll go back to the Patient Card.

If the phone number is correct and you want to dial this person to speak to them click on **Yes**.

The following dialogue message will then appear:

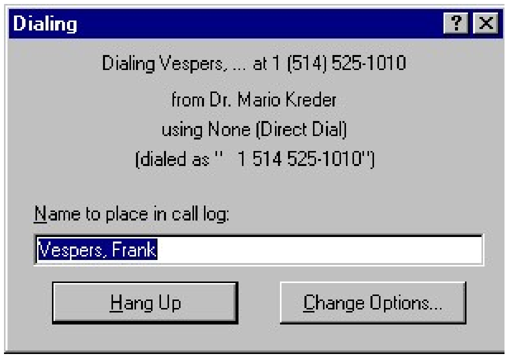


Figure 46 — Dialing message

If you don't do anything CareOffice will continue dialing and you'll get the following message:

Figure 47 — Call Status

Simply follow the onscreen directions to **Talk** or **Hang Up**.

If the Dialing Dialogue above contains incorrect information click on either the **Hang Up** or **Change Options** buttons.

If you click on **Change Options** the modem will hang up and you will see the following dialogue box:

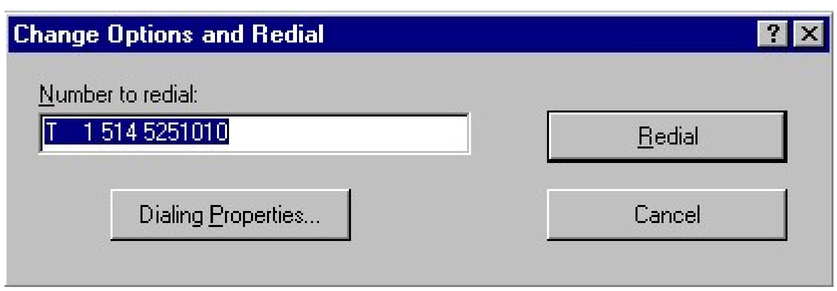


Figure 48 — Change Options and Redial

You can then position your mouse over the white box under **Number to redial** and click to edit the phone number there and select **Redial** or **Cancel**.

Alternatively, if the Dialing Properties must be changed, click on **Dialing Properties.** CareOffice accesses **the Phone Dialer** that comes with Windows. When you click on **Dialing Properties** the **Phone Dialer** Accessory is automatically started in the background. To access it first move the mouse pointer to the bottom of the screen to see the Windows Task bar.

Figure 49 — Windows Task bar

Click on **Phone Dialer** and you will see a window similar to the following, which you can modify according to your needs.

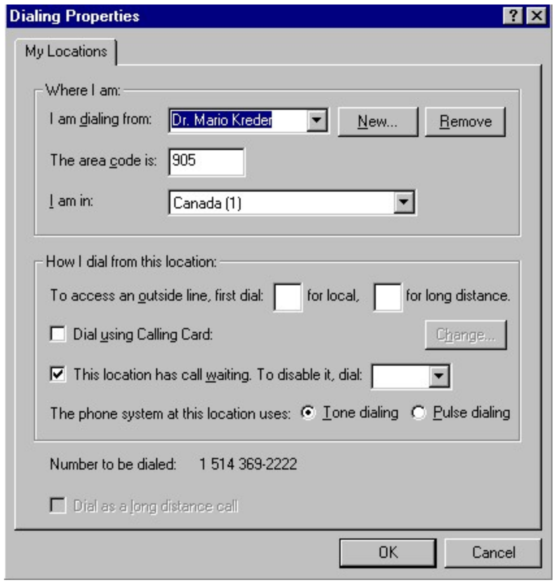


Figure 50 — Dialing Properties of Phone Dialer

*N.B. For more information on the **Phone Dialer** accessory see your Microsoft Windows 95/98/NT User's Guide.*

Dialing the Patient from the CareOffice Desktop

You can also access the automatic dialer from the CareOffice desktop. While viewing the Patients right click on the Patient Information box and select dial from the pop down menu as shown below.

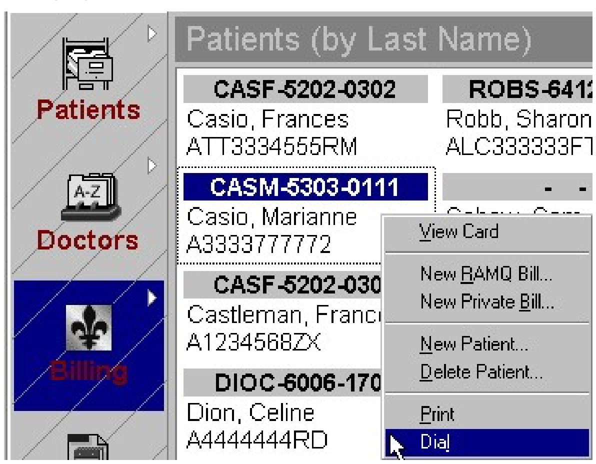


Figure 51 — Dialing Patient from desktop

Dialing from the Patient Demographics Screen

From the Patient Demographics Screen you can click on any of the telephone icons for which there is a corresponding telephone number and CareOffice will automatically dial that patient's number.

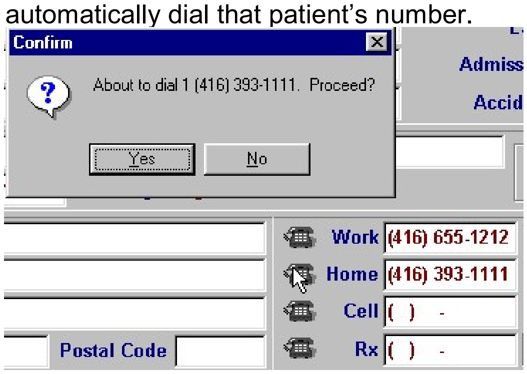


Figure 52 — Auto-dialing from Patient Demographics

If you click on a telephone icon for which there is no associated telephone number you will receive an error message that the telephone number is blank.

Exiting the Patient Card

To exit the **Patient Card** you can either click on the **Exit Door** or in the **Close Box**.

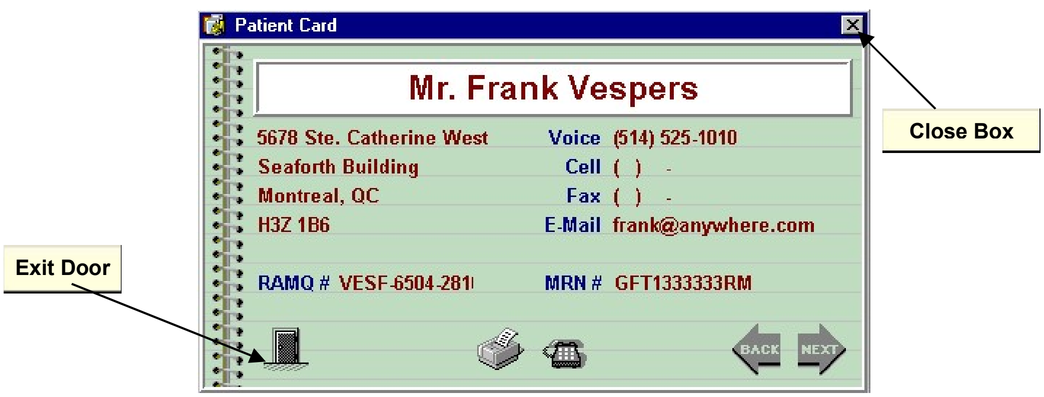


Figure 53 — Closing the Patient Card

Printing Patient Name and Address

You can print a patient's name and address very flexibly in CareOffice from several locations within the program. You can customise the look of your envelopes and labels to suit your needs. The following discusses the various options of the Printing Envelopes/Labels feature.

Choosing the Printer

CareOffice will always send any print jobs you have requested to the printer selected in the Printer Setup. To select the printer follow the following steps:

1. Click on the **File** menu item on the CareOffice main desktop
2. Click on **Printer Setup** as shown below.

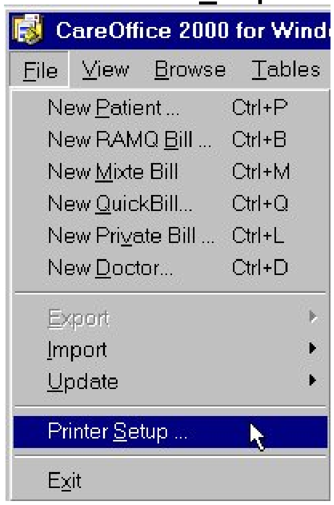


Figure 54 — File, Printer Setup

3. Select the printer of your choice by clicking on the down arrow next to the printer **Name:** and then highlighting the printer.

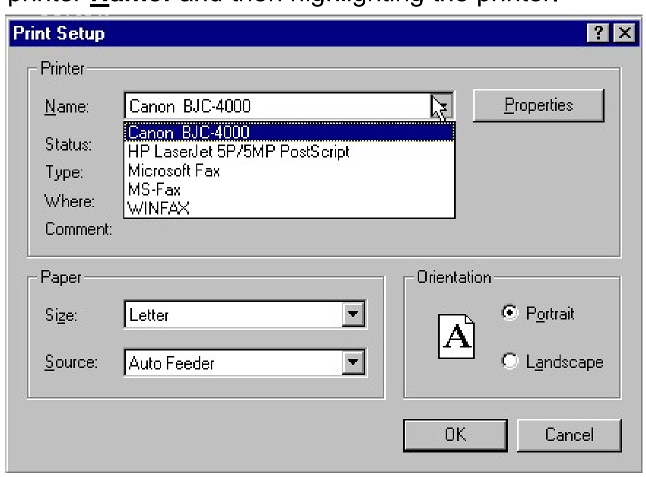


Figure 55 — Print Setup

4. Click on the **OK** button when done.

Selecting Print

CareOffice allows you to print envelopes or address labels from three different areas in the program; from the **Patient Card**; from the **Patient Demographics** Window or from the **CareOffice Main Desktop**.

Printing from the Patient Card

Once you've chosen the correct default printer click on the **Printer** icon at the bottom of the **Patient Card** to print envelopes or labels.

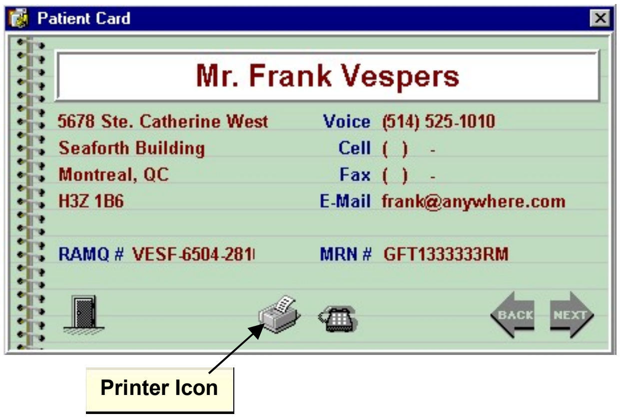


Figure 56 — Printing from the Patient Card

Printing from the Patient Demographics Window

You can also print labels from the **Patient Demographics** window as illustrated in the following figure.

Figure 57 — Printing Labels

If you click on the down arrow next to the Print button you will see the above pop –down menu. Then you can choose **Address Labels** and you will see the **Print Envelopes & Labels** window

Printing from the CareOffice Main Desktop

While viewing **Patients** on the CareOffice Main desktop you can right click on any of the Patient Information Boxes and select **Print** as shown in the following figure.

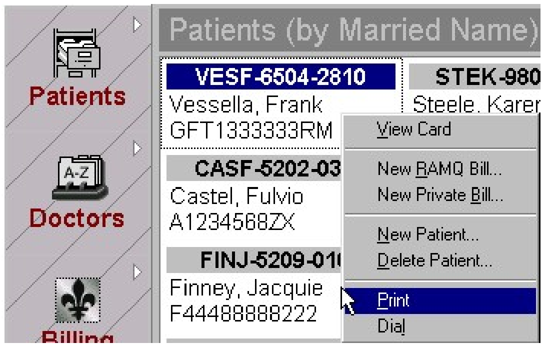


Figure 58 — Printing while viewing Patients on desktop

Once you've selected **Print** you will see the **Print Envelopes/Labels** window as in the examples above.

Printing Options

If you choose to print from the **Patient Card**, the **CareOffice Main Desktop** or from the **Patient Demographics** window you will see a window similar to the following where you can choose from amongst many options to customise the look of your envelopes and labels.

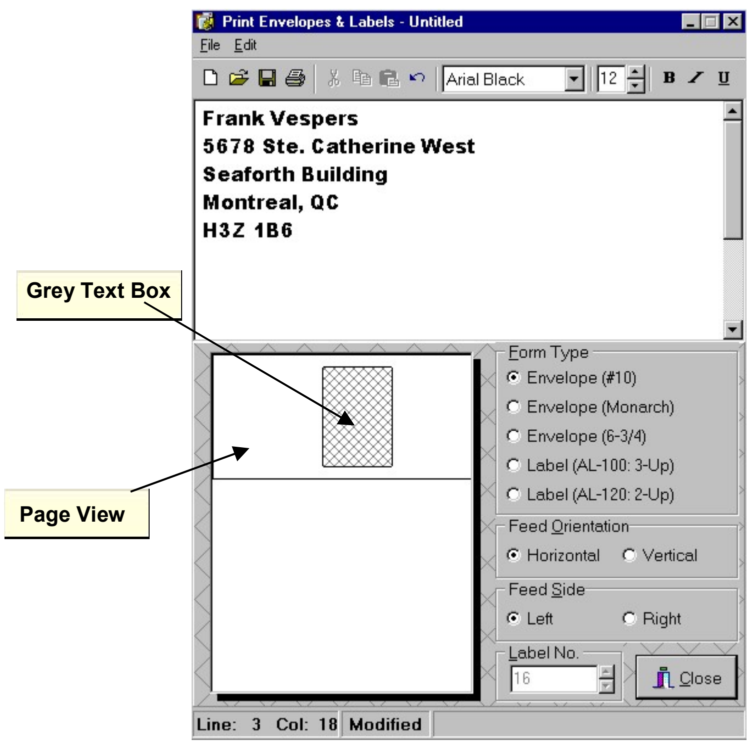


Figure 59 — Printing Options

File Operations

CareOffice also allows you to save the information in the **Print Envelopes & Labels** window to be printed at a later time. The primary use of the Save File feature is to save any formatting changes the user may want to use again (i.e. font, style, etc…) To do this click on the **Save File** icon and give the file a name in the **Save As** dialogue box. When you want to open that file later just click on the Open Existing File icon to locate the file to be printed.

You can also create a new file with name and address information to be printed or saved by clicking on the **New File** icon. This will clear the **Text Box** of all information previously shown.

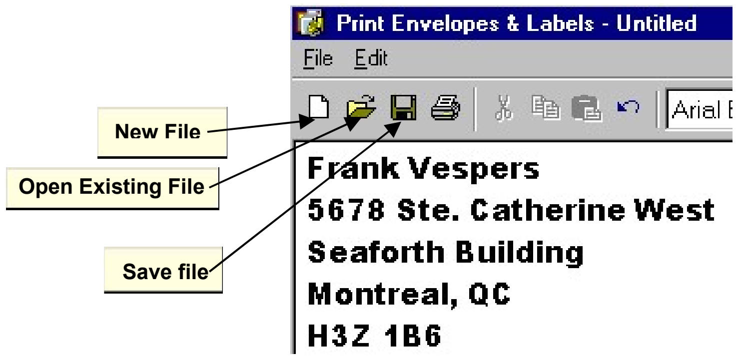


Figure 60 — File Operations in Print Envelopes & Labels

Editing Text in the Print Box

When you move your mouse on top of the **Text Editing Box** you will notice that the cursor changes from an **arrow** to an **I Bar**.

You can change the contents of the **Text Editing Box** by simply positioning the **I Bar** over the text and then click and drag – while holding down the mouse button – over the text to be changed. Then type in the correct information.

To add additional text to the **Text Editing Box**, position the **I Bar** at the location where the new text is to be added and then click and type.

N.B. The **Grey Text Box** will show you where the text will be printed on the label or envelope chosen. If the **Grey Text Box** is larger than the envelope or label you will want to change the font type or font size to make it fit into the required space.

Editing Tools

As shown below, at the top of the **Print Envelopes & Labels** window some editing tools are provided for your convenience.

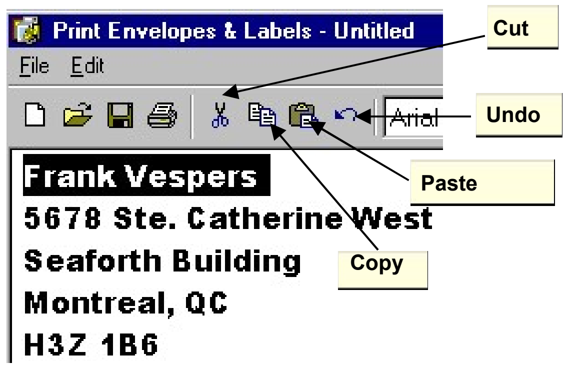


Figure 61 — Editing Tools in Print Envelopes & Labels

If you highlight a word or group of words in the **Text Editing** box you will notice that all the editing tools are activated. If you then click on the **Cut** icon the text will be deleted. Clicking on the **Copy** icon will copy the selected text to the clipboard. Clicking on the **Paste** icon will paste the clipboard's contents where the blinking I Bar is located. If any text has been highlighted the highlighted text will be replaced with the contents of the clipboard. The **Undo** icon will undo the last action whether it is cutting, typing, changing font or font attributes. If the **Undo** icon is greyed out it cannot be used at this time.

Formatting Text in the Print Box

The following figure illustrates the various formatting options available.

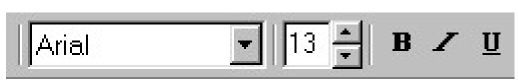


Figure 62 — Formatting Options

To change the font click on the down arrow next to the font name and select the font you wish. To change the size of the font click on the down or up arrow next to the font size and select the font size you want. Any changes to the font used or the font size will apply to all the text in the **Text Box** if no text has been selected. If you have highlighted a word or group of words the font change will apply to that selection only.

You can also change the attributes of the text to include bold, Italic or underline. Simply highlight all or part of the text and click on the Bold, Italic or Underline symbols.

Setting a Default Font

If you usually use the same font you may want to set it as the default. To do this

1. Click on **Edit**
2. Select **Set Default Font…** as shown in the figure below

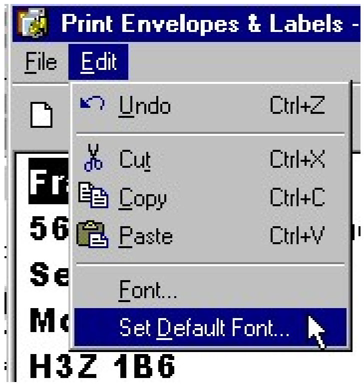


Figure 63 — Set Default Font…

You will see a window similar to the following where you can select your default font.

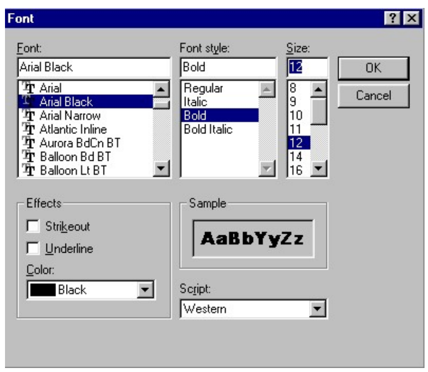


Figure 64 — Select Font Attributes

3. Use the mouse arrow to highlight the font and other font attributes you would like to make default.
4. Click on the **OK** button.

Changing the Form Type, Feed Orientation and Feed side

The **Form Type** Box allows you to select the type of paper or envelope the Text Box's contents will be printed on. You can choose from 3 envelope sizes and two types of label paper. Click on the various radio buttons and watch the **Page View** change. If you select a type of Label paper the **Feed Orientation** and **Feed Side** options will be greyed out and cannot be selected.

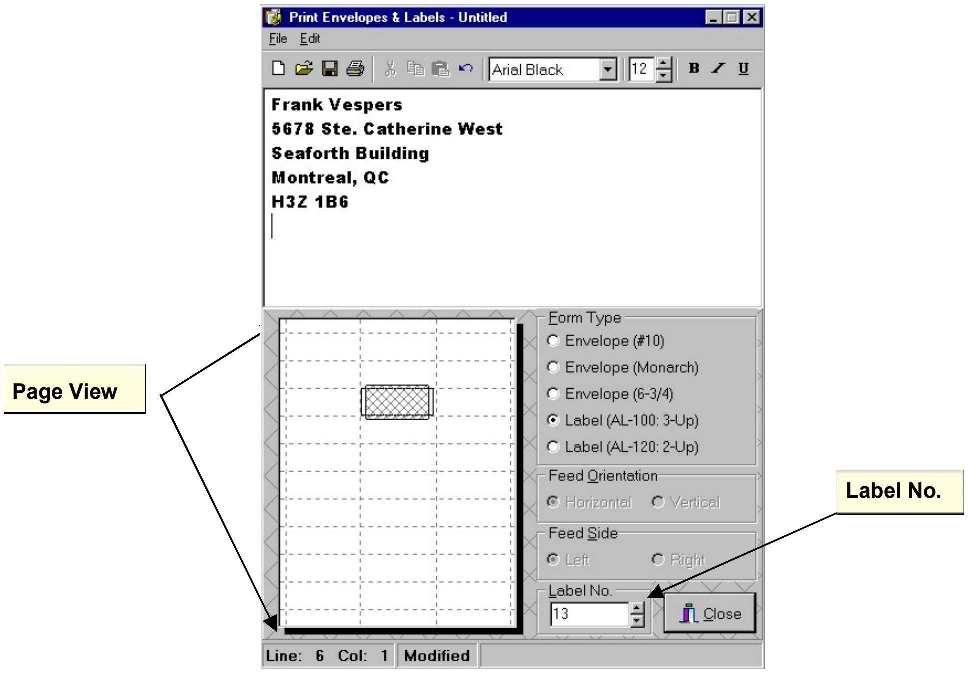


Figure 65 — Changing the Form Type

The illustration above shows that the **Page View** shows the text will be printed on the third label down from the top. This option is controlled by **Label No.** You can choose to print anywhere on the label paper by clicking on the label you'd like to print to or by changing the number in **Label No.** The label number can be changed by either typing in the number or using the up and down arrows to the right of the number.

Feed Orientation allows you to select to feed in the envelope either horizontally or vertically.

Feed Side controls which side of the printer you will be feeding the envelope.

The use of the **Feed Orientation** and **Feed Side** options is illustrated in the figures below.

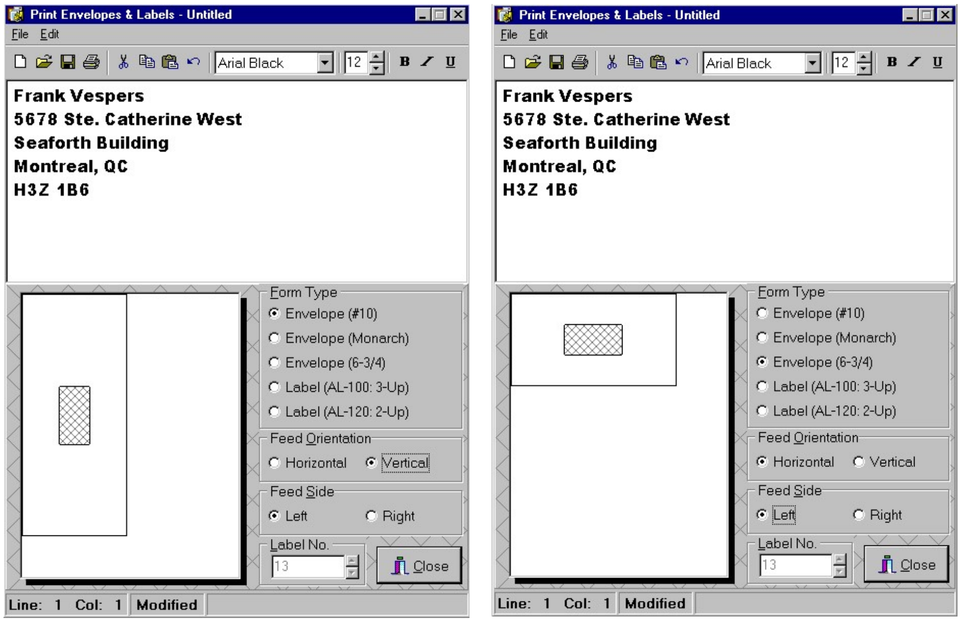


Figure 66 — Feed Orientation and Feed Side

Print Current File

When you are ready to print click on the printer icon.

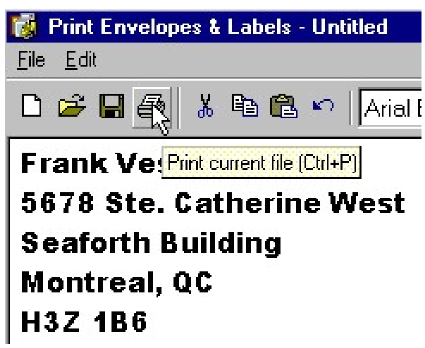


Figure 67 — Ready to print

Chapter 3

Doctors

Doctors Module Overview

The Doctors module is used to input new doctor information and update existing doctor records. CareOffice allows you to keep track of pertinent information such as their address, phone numbers, specialities etc… to make finding the doctor you need easy. The Doctors Module of CareOffice will allow you to search through the database in several ways to make it easier to find a particular doctor or group of specialists you are looking for.

Sorting the Doctor Database

There are two different fields you can sort the doctor database to view it onscreen:

1. By Number — license number
2. By Name — last name

When the doctor database is sorted by Number the doctors' license numbers are sorted numerically in ascending order.

If you select to view by Name the doctor data is sorted by last name and then by first name.

How to View the Doctor Database

You can select to view the Doctor Database in a number of different ways, by clicking on the **Doctor** icon or by choosing **View** from the menu bar.

Click on the **Doctors** icon on the left side of the CareOffice desktop. (You'll notice that the icon changes colour to indicate that it has been selected.) You will see a cascading menu as shown in the following figure.

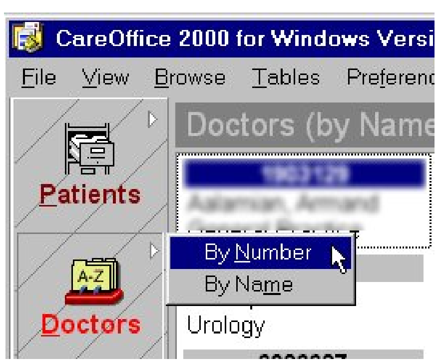


Figure 68 — Viewing Doctors on the desktop

You can access the same sorting options by clicking **View** on the menu bar at the top of the screen and highlighting **Doctors**. A cascading menu will appear with the same options.

Figure 69 — View, Doctors, By Name

Once you have the cascading menu, select the sorting method you wish to implement by highlighting the sort option and then clicking on it. (The sort may take a few minutes depending on the capabilities of your computer, how many other applications you have running at the time and how large your doctor database is.)

The doctor information displayed contains the Doctor's License number, last name, first name and finally their speciality.

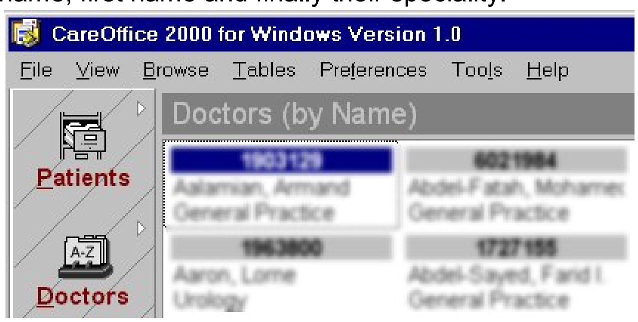


Figure 70 — View Doctors (by Number)

Moving through the Sorted Doctor Database

Once you've sorted through the Doctors Database you can use any of the four ways following to view a group of doctors

1. If the Doctors Database was sorted by name you can click on any of the alphabetised tabs to the right of the sorted doctor records to see the doctors whose last name begins with the letter on the tab selected. The first doctor found will be highlighted.

   If the Doctors Database was sorted by their license numbers, you can click on the numeric tabs to the right to see the doctor whose license number begins with or is closest to the number on the tab selected.
2. Click on the right or left arrow on the scroll bar at the bottom of the screen to move through the doctor data one column at a time.
3. Click on the light grey space on the scroll bar to move through the doctor data one screen at a time
4. Drag the scroll bar to move several screens at once.
6. Use the AutoType feature.
   a) Click on the Doctor Browser on the CareOffice desktop

b) Select any of the available views

c) Start typing the doctor's name or license number. You will see the search criteria you've typed appear as in the following illustration

Figure 71 — AutoType illustrated

The search criteria you've typed will appear after **Find:**. As soon as you pause CareOffice will move to the first name in the database containing the search letters and will highlight that name.

The illustrations below show the locations of the tabs, arrows and etc…

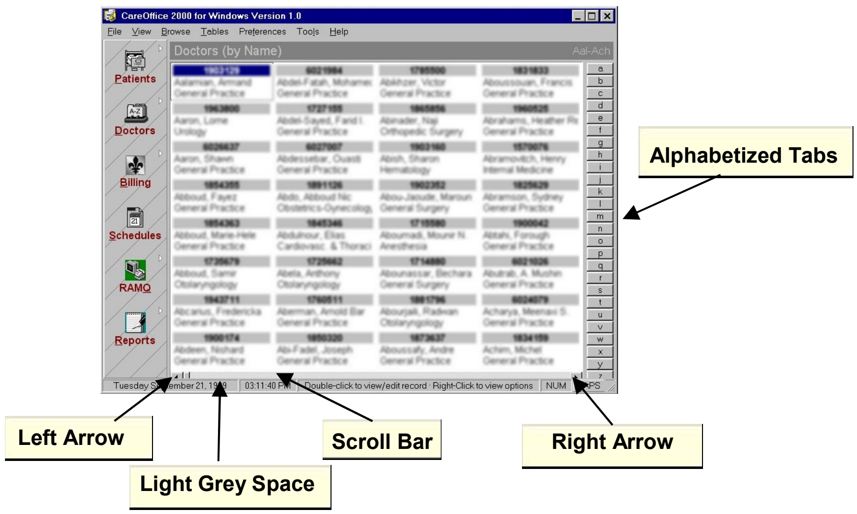


Figure 72 — Location of tabs, arrows etc… on Main Desktop (a)

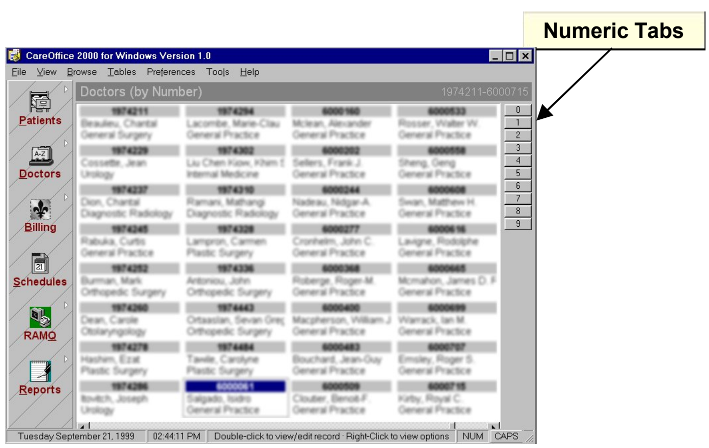


Figure 73 — Location of tabs, arrows etc… on Main Desktop (b)

Viewing a Doctor Record

When you have sorted the database and wish to view that doctor's record you need only double left click on the **Doctor Information Box**.

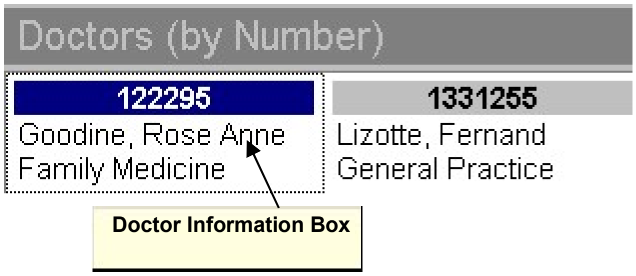


Figure 74 — Doctor Information Box

Browsing the Doctor Database

The **Browse** menu option may be used to very quickly find a doctor's record. It allows you to sort the database or to search through the fields in a data base

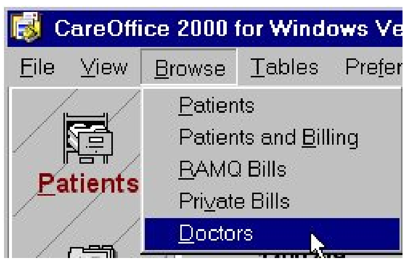


Figure 75 — Browse, Doctors

Once you have clicked on **Browse** and selected **Doctors** as in the figure above you will see a window similar to the following illustration.

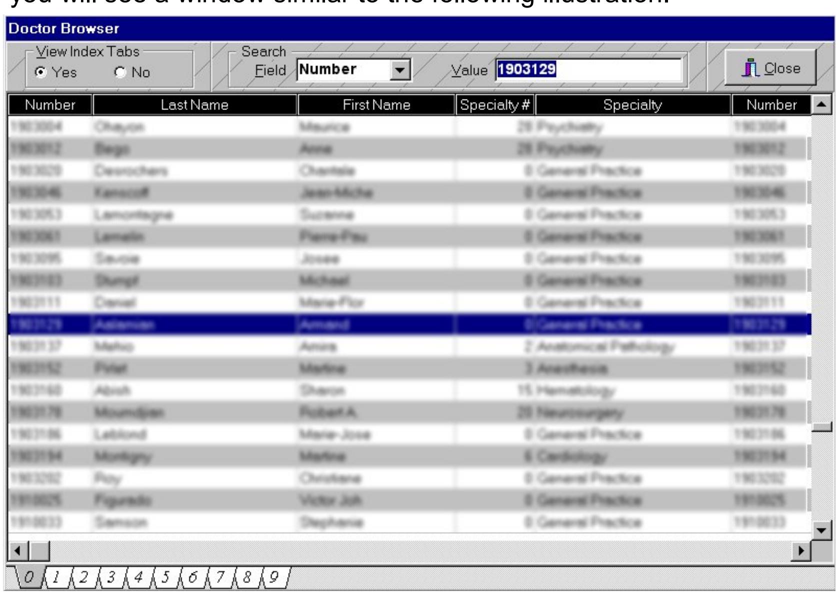


Figure 76 — Doctor Browser

Searching for a Doctor

There are three different ways to **Search** through the **Doctors** data base for a particular doctor or group of doctors:

1. Number
2. Name
3. Specialty

At the top toward the centre of the **Doctor Browser** window you will see an area labelled **Search**. When searching for a particular doctor you will need to tell the **Browse** tool which field in the database you want it to look at and the value of that field you are searching for.

If you click on the down arrow beside **Field** you will see the following pop-down menu.

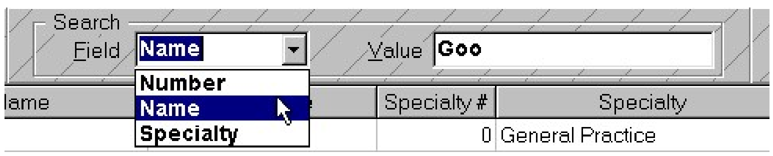


Figure 77 — Search by Field

The white box next to **Value** is where you tell the Browse tool the value of the Field it should look for.

For example:

You would like to find a Doctor whose last name is Goodine and whose Specialty is General Practise:

1. Left Click on **Field** and without letting go of the mouse button
2. Select **Name**

Notice that the I bar cursor is blinking in the text insertion box to the right of **Value.**

3. Type "**G**" in the **Value** insertion box

The first doctor found whose name begins with "**G**" will be displayed and highlighted. To narrow the search further:

4. Type "**o**" after the "**G**" in the Value insertion box.

The first doctor found whose name begins with "Go" will be displayed and highlighted.

You can continue in this manner until you have found Dr. Goodine or you can simply type the entire last name in the **Value** insertion box.

You can follow the same procedure when searching for a doctor when you know his/her **License** number by selecting **Number** in the **Search Field** area and then typing in part or all of their license number in the **Value** entry box.

To search on **Specialty** you will select **Specialty** in the **Search Field** area and then insert the number corresponding to that Specialty in the **Value** entry box. All specialities are assigned an integer value that makes the search on specialities much faster.

Using the Index Tabs to Browse the Doctor Database

At the top left of the Doctor Browser you will see **View Index Tabs** with two radio buttons **Yes** and **No**. If you have selected the **Yes** button when you search on the **Name** field, you will see alphabetised tabs at the bottom of the screen which you can then click on to see all the doctors whose last name begins with C as shown in the example below. You can then use horizontal scroll bars to find the doctor you're looking for.

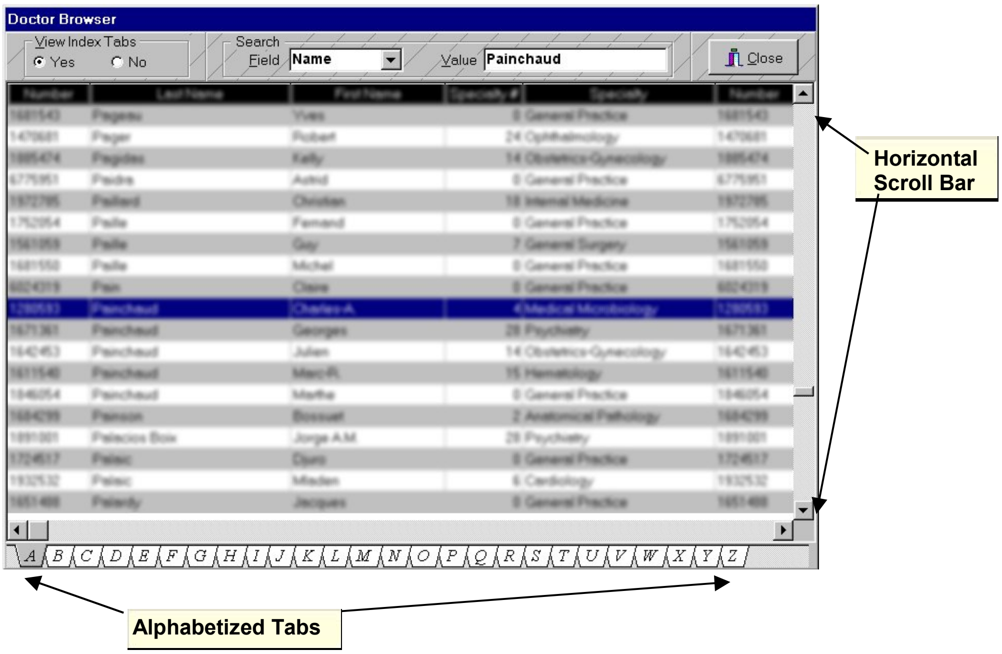


Figure 78 — Using Alphabetised Index Tabs

You can also use the **Index Tabs** if you've selected to search on either the doctors license **Number** or **Specialty**. In these cases the **Index Tabs** will be numeric as shown in the following figure.

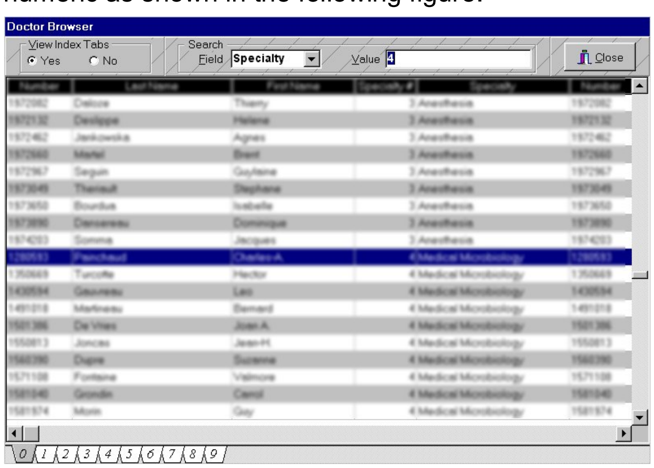


Figure 79 — Using Numeric Index Tabs

The Doctor Information Screen

The snapshot below is the **Doctor Information** screen that you can use to input new doctor information or update existing.

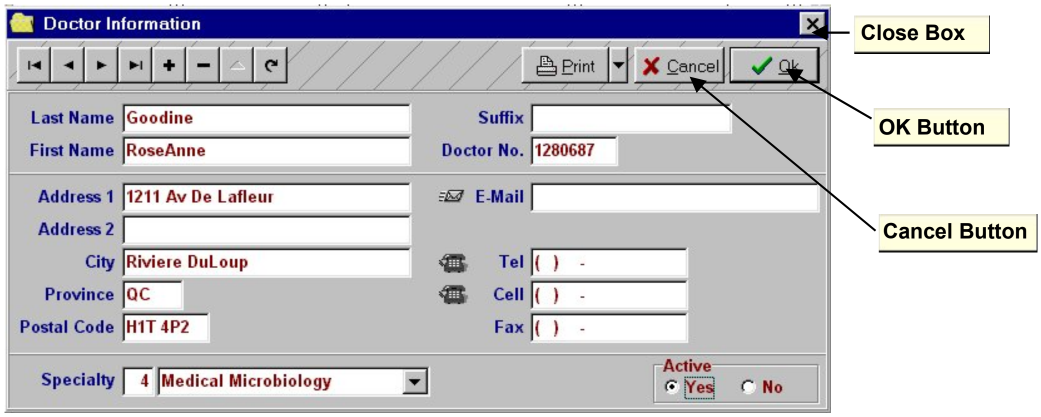
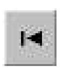


Figure 80 — Doctor Information screen

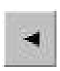
Most of the fields on the **Doctor Information** screen are self-explanatory but there are some buttons at the top of the window, which need some explanation. Note the Active status located on the bottom left is for future use only at the present time.

If you simply position your mouse pointer over any of the buttons a little yellow box with a word or two of text will tell you what the button is used for. The following briefly defines these buttons and their uses:

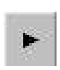
N.B. The order of the doctors in the database depends on the view you have selected or how the database has been sorted.



First Record – Pressing this button will show you the first record of the doctor database.

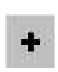


Prior Record – Pressing this button will show you the previous record in the doctor database.

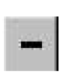


Next Record – Pressing this button will show you the next record in the doctor database.

Last Record – Pressing this button will show you the Last Record in the doctor database.

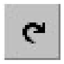


Insert Record – If you click on this button while editing a new or existing doctor record it will be assumed that you want to save your changes and a new record will be inserted



Delete Record – Clicking on this button will cause the record currently on the screen to be deleted from the patient database. You will not be asked to confirm that you want to delete the current record on screen if you press this button.

Edit Record – Clicking on this button will allow you to edit the record displayed.



Refresh Data will update the screen of doctors. This is especially useful for networks where many users are entering or changing doctor information at the same time. The refresh button will display any new or changed doctor information entered by another user.

If you click on the **Print** button you will be brought to the **Printing Envelopes/Labels** window. The doctor information you were viewing before clicking on this button will be copied into the **Text Editing** box of this window.

Clicking on the **OK** button will save to disk all the changes you've made while in the **Doctor Information** screen and exit.

Clicking on **Cancel** will exit the **Doctor Information** screen without saving any changes made.

Adding New Doctor Records

It is very simple to add a new doctor to the doctor database. When in the CareOffice main desktop, click on the **File** menu at the top of the screen.

You will see the following menu:

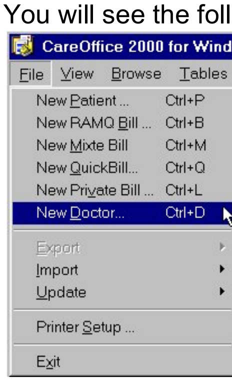


Figure 81 — File, New Doctor…

Without letting go of the mouse button select **New Doctor** and then release the mouse button. You can also use the Hot Key **Ctrl+D** to access the **Doctor Information** screen.

Alternatively if you have the **Doctors** module selected and are viewing the database you can right click on any of the doctor records or in the white space around them to access the **New Doctor** option.

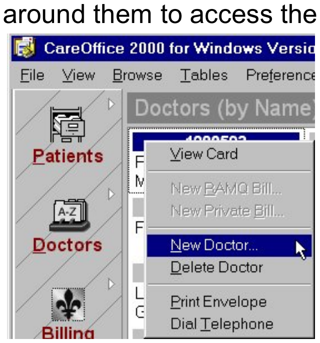


Figure 82 — New Doctor…

You can also access the **Doctor Information** screen from the **Doctor Browser** by double left clicking on the data for any of the doctors or right click and select **New** from the pop up menu. In either case you will be brought to **the Doctor Information** screen where you add a doctor to the database.

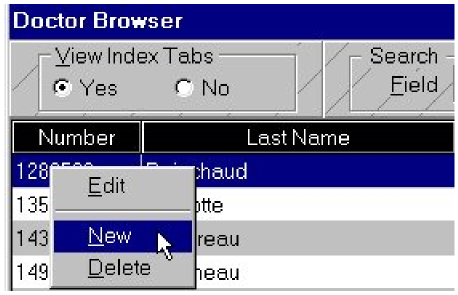


Figure 83 — Add new doctor from Doctor Browser

Below is a snapshot of the Doctor Information screen that will appear when you select **New Doctor…**

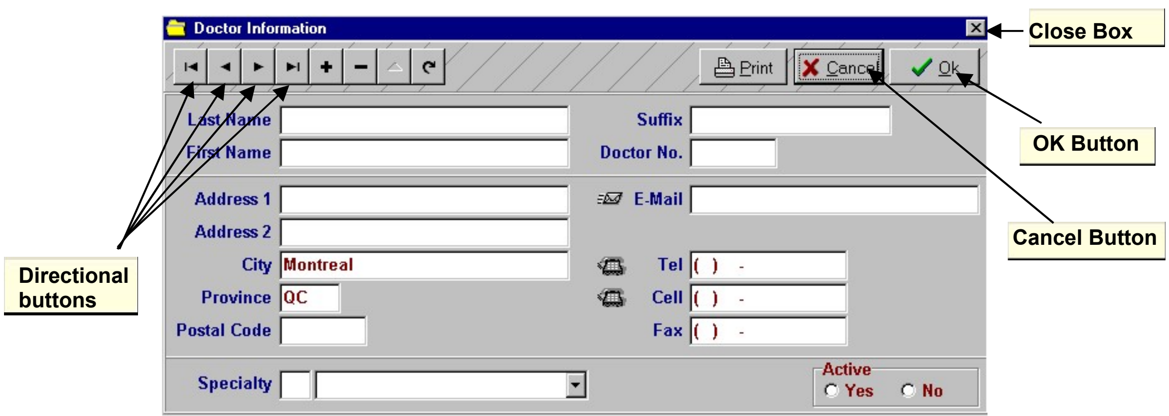


Figure 84 — Doctor Information screen

Notice that the **City** and **Province** have been filled in automatically. The **City** and **Province** fields receive their values from the preferences set up in the **User Defaults** of the **Carefile User Profile**.

You can now tab through the various fields to input the information you have on the doctor. To insert the **Specialty** of the Doctor simply click on the scrollable field as shown in the illustration below.

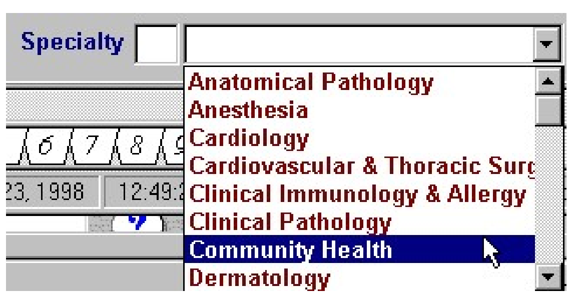


Figure 85 — Selecting Doctor's Specialty

Highlight the correct **Specialty** and then click on the little square to the left of **Specialty** and the correct **Specialty Code** will be inserted. CareOffice has been written so that if you enter a speciality number the correct speciality text is automatically highlighted in the adjoining dropdown list. Also, if you first select the speciality text the correct speciality code will automatically be inserted in the adjoining field.

Figure 86 — Inserting Specialty code

To save the new doctor information you must click on the **OK** button at the top of the screen. If you click on the **Insert** button you can insert another record or you can click on one of the directional buttons to edit another doctor's information. If you click on the **OK** button CareOffice will save the changes you have made and you will be brought back to the main screen. If you click on the **Cancel** button or the **close box** you will see the following one of the warnings:

Figure 87 — Confirming cancel

You will see the above warning if the record displayed is one that you've recently edited. If you have moved through the database to view or edit other records and click on the **Cancel** button or **close box** you will see the following warning.

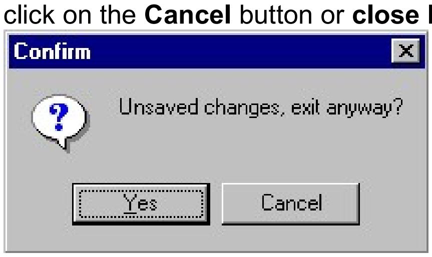


Figure 88 — Confirming exit

Click on the **Yes** button to lose your changes and exit the **Doctor Information** screen or click on the **Cancel** button or the **close box** to go back to the **Doctor Information** screen.

Editing Existing Doctor Records

To edit a doctor's record you must have the **Doctor Information** window displayed. You can get there in a number of different ways.

1. Click on the **Doctors** icon on the CareOffice desktop and select any of the views available.

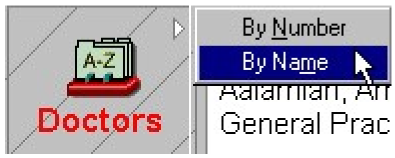


Figure 89 — Viewing Doctors on the desktop

2. Click on **View** on the menu bar at the top of the CareOffice desktop and select **Doctors** and then choose one of the views.

Figure 90 — View, Doctors, By Number

3. Click on **Browse** on the menu bar at the top of the CareOffice desktop and then select **Doctors** from the pop-down menu.

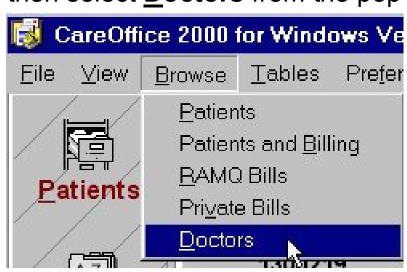


Figure 91 — Browse, Doctors

After you have found the doctor using either the **Doctor Browser** or the **Doctor View** screen you can double click anywhere on the information displayed about that doctor and CareOffice will bring you directly to the **Doctor Information** window in edit mode. You can also access the **Doctor Information** screen from the **Doctor** if you right click on the doctor's information and select **edit** from the pop up menu.

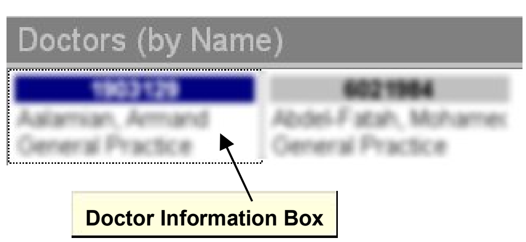


Figure 92 — Doctor Information Box on desktop

Or

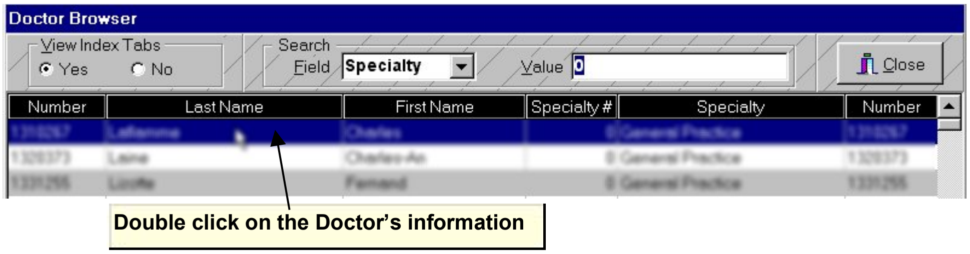


Figure 93 — Doctor's Information box in Doctor Browser

Alternatively if you're using the **Doctor Browser** you can right click on the doctor's information and select **Edit** as shown below.

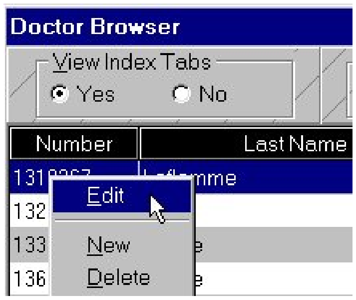


Figure 94 — Right click and select Edit

The **Doctor Information** screen looks like the following illustration

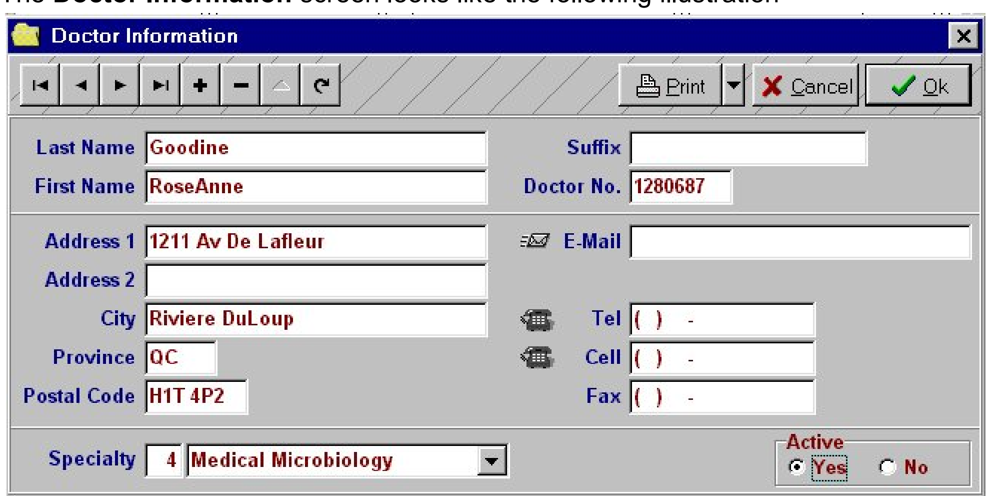


Figure 95 — Doctor Information screen

Once you have the **Doctor Information** screen displayed you can either

Highlight a field and then type over the field contents to change the information displayed
or
Press on the Tab key until you've reached the field to edit and then type over the field contents to change the information displayed.

To save the changes you have made click on the **OK** button on the top right corner of the screen.

If there are other Doctor records that you would like to edit or view before exiting the Doctor screen you can use the arrow buttons to go to another Doctor's record. You can continue to make editing changes until you are ready to leave this screen.

To save the new doctor information you must click on the **OK** button at the top of the screen. If you click on the **Insert** button you can insert another record or you can click on one of the directional buttons to edit another doctor's information. If you click on the **OK** button CareOffice will save the changes you have made and you will be brought back to the main screen.

If you click on the **Cancel** button or the **close box** you will see the following one of the warnings:

Figure 96 — Confirm loss of changes

You will see the above warning if the record displayed is one which you've recently edited. If you have moved through the database to view or edit other records you will see the following warning if you click on the **Cancel** button or the **close box** and haven't saved your changes.

Figure 97 — Confirm exit

Click on the **Yes** button to lose your changes and exit the **Doctor Information** screen or click on the **Cancel** button or the **close box** to go back to the **Doctor Information** screen.

Deleting a Doctor Record

If you delete a Doctor's record or file you will be deleting all information about that Doctor. Before you follow this procedure be sure you really do want to delete the Doctor's information as it will be irretrievable after you confirm the delete process.

You can delete a patient's record or file from the following program locations:
CareOffice Desktop
Doctor Information Window
Doctor Browser

CareOffice Desktop

While viewing the doctor database from the CareOffice desktop you can right click on the doctor's information box and select **Delete Doctor** from the cascading menu.

In the illustration below the doctor's record whose information box is highlighted would be deleted.

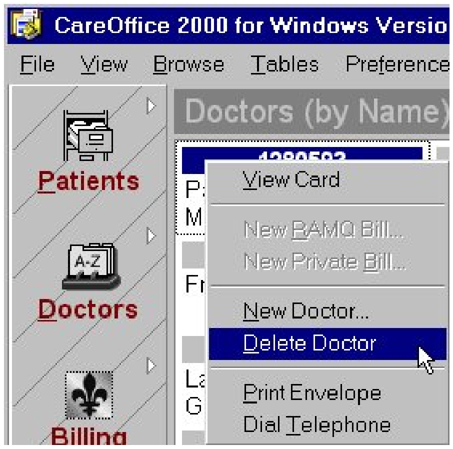


Figure 98 — Delete Doctor from desktop

You will receive the following message asking you to confirm your action.

Figure 99 — Confirm deletion

Doctor Information Window

While in the **Doctor Information** window you can click on the **Delete record** button to delete the Doctor information currently displayed.

Figure 100 — Delete record in Doctor information

You will be asked to confirm the deletion.

Figure 101 — Confirm deletion

If you click on the **Cancel** button or the **close box** the record will not be deleted. If you click on the **OK** button the record will be deleted but the changes will not be written to disk until you have exited the **Doctor Information** window by clicking on the **OK** box on the top right hand corner of the window. N.B. You will not be asked to confirm your changes when you click on the **OK** box.

If you click on the **Cancel** box beside the **OK** box none of the changes you requested since entering the Doctor **Information** window will be written to disk and you will receive the following message:

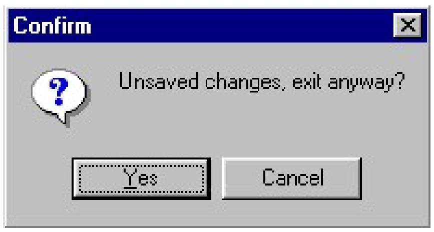


Figure 102 — Confirm exit

Doctor Browser

You can also delete a doctor's file while in the **Doctor Browser** window. Simply right click anywhere on the Doctor information and select **Delete** as shown below.

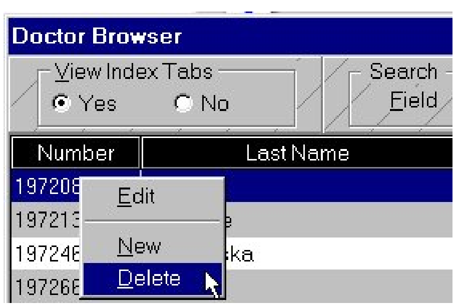


Figure 103 — Delete a doctor's record from Doctor Browser

You will see the following message: to confirm your action.

Figure 104 — Confirm deletion

If you click on the **OK** button, the Doctor's record will be deleted and the change to the database will be immediately written to disk. If you click on **Cancel** or on the **close box**, no change to the Doctor database will be made.

The Doctor Card

The **Doctor Card** is a quick way to see some basic information about a particular doctor.

View Doctor Card

While in the Doctor's view mode right click on the Doctor's information and you will see the following cascading menu.

Figure 105 — View Card

Select **View Card** and a Doctor card similar to the following will appear.

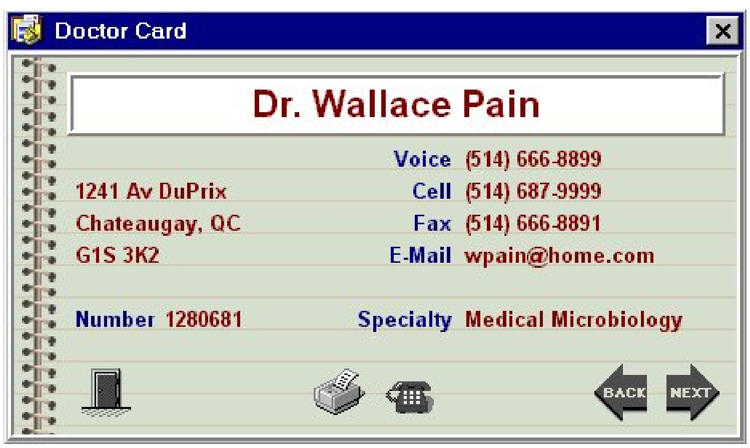


Figure 106 — View Doctor Card

Viewing Other Doctor Cards

On the bottom right of the **Doctor Card** you see two arrows labelled **Back** and **Next**. You can click on these arrow buttons to scroll through the doctor database and look at the cards of other doctors.

Dialing the Doctor

From the **Doctor Card** you can click on the **Telephone** icon and CareOffice will automatically dial the doctor whose card is displayed, if your modem and telephone have been connected properly.

You will then see the following message:

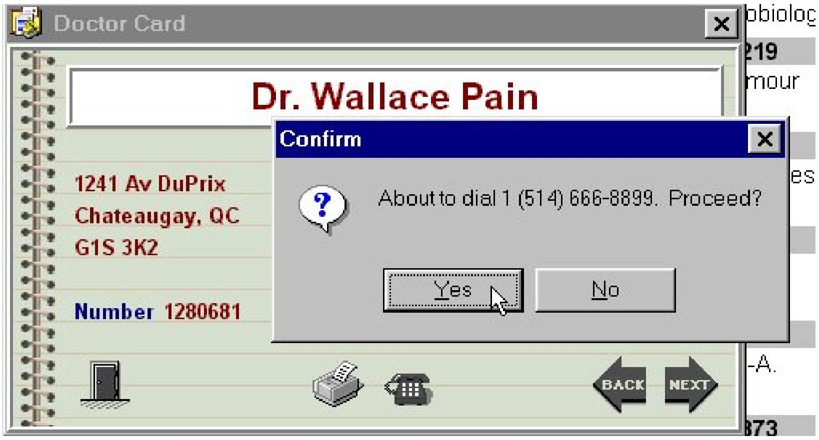


Figure 107 — Confirm dialing number

CareOffice assumes you want to use the doctor's voice number.

If you don't want dial the number shown in the Confirm dialogue box then click on **No** and you'll go back to the Patient Card.

If the phone number is correct and you want to dial this person to speak to them click on **Yes**.

The following dialogue message will then appear:

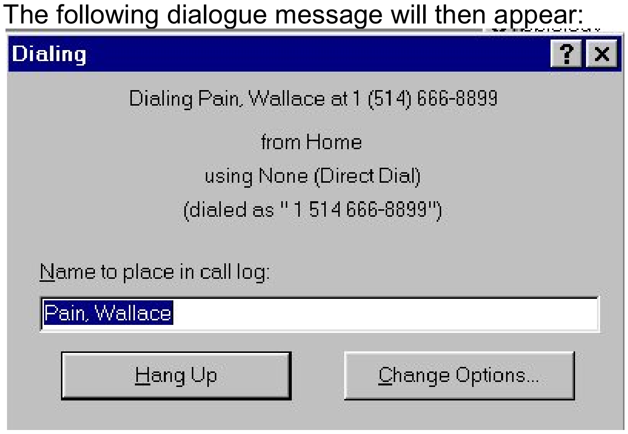


Figure 108 — Dialing message

If you don't do anything CareOffice will continue dialing and you'll get the following message:

Figure 109 — Call Status

Simply follow the onscreen directions to **Talk** or **Hang Up**.

If the **Dialing Dialogue** contains incorrect information, then click on either the **Hang Up** or **Change Options…** button**.**

If you click on **Change Options…** the modem will hang up and you will see the following dialogue box:

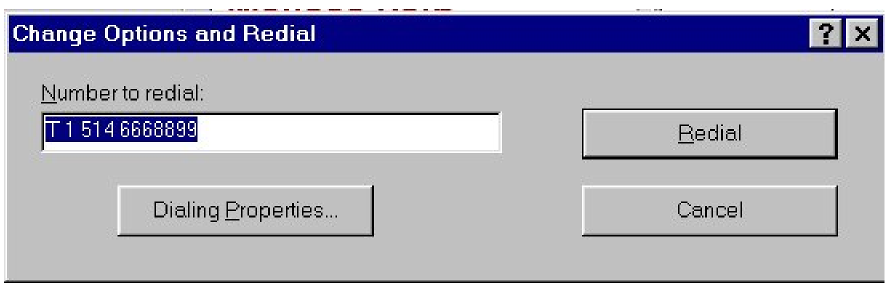


Figure 110 — Change Options and Redial

You can then position the cursor over the white box under **Number to redial:** and click to edit the phone number and select **Redial** or **Cancel**.

Alternatively, if there is something about the Dialing Properties, which needs to be changed then click on **Dialing Properties.** CareOffice accesses **the Phone Dialer** that comes with Windows. When you click on Dialing Properties the **Phone Dialer Accessory** is automatically started in the background. To access it you have to first move your mouse pointer to the bottom of your screen to see the Windows Task bar.

Figure 111 — Windows Task Bar

Click on **Phone Dialer** and you will see a window similar to the following, which you can modify according to your needs.

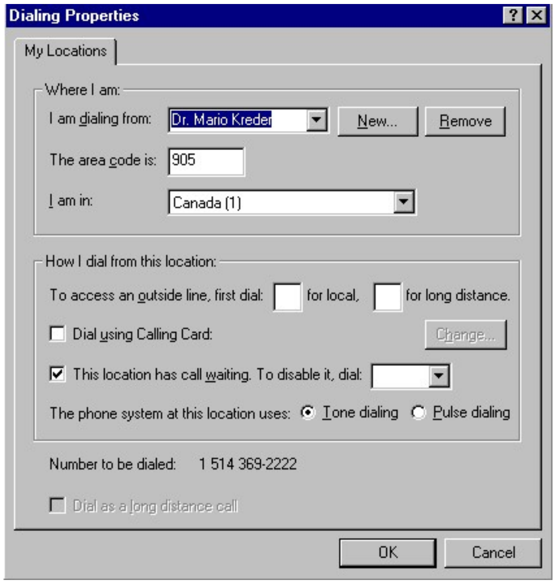


Figure 112 — Dialing Properties of Phone Dialer

*N.B. For more information on the **Phone Dialer** accessory see your Microsoft Windows 95/98/NT User's Guide.*

Dialing the Doctor from the CareOffice Desktop

You can also access the automatic dialer from the CareOffice desktop. While viewing the Doctors, right click on the Doctor Information box and select dial from the pop down menu as shown below.

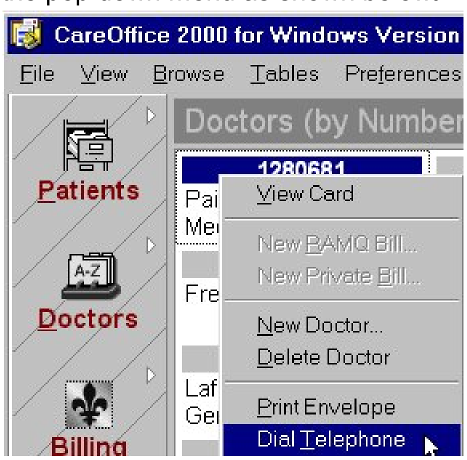


Figure 113 — Dialing Doctor from desktop

Dialing from the Doctor Information Screen

From the Doctor Information Screen you can click on any of the telephone icons for which there is a corresponding telephone number and CareOffice will automatically dial that doctor's number.

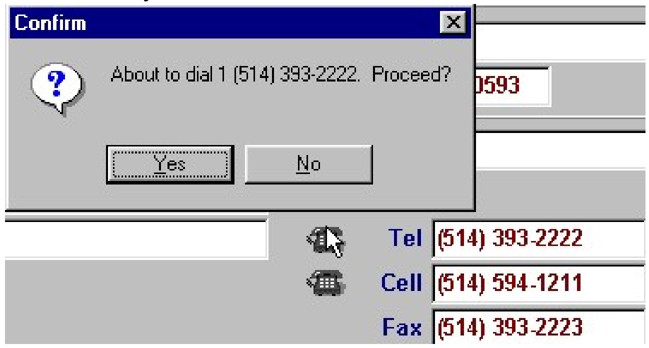


Figure 114 — Auto-dialing from Doctor Information

If you click on a telephone icon for which there is no associated telephone number you will receive an error message that the telephone number is blank.

Exiting the Doctor Card

To exit the **Doctor Card** you can either click on the **Exit Door** or in the **Close Box**.

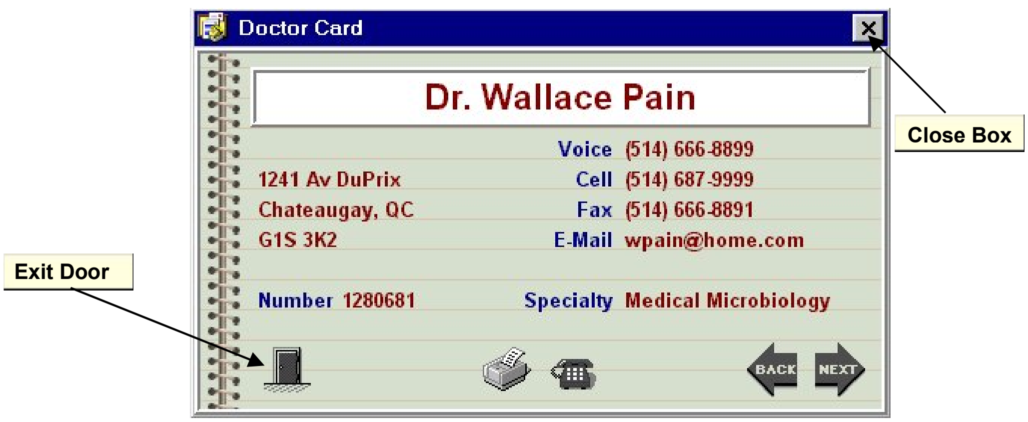


Figure 115 — Closing the Doctor Card

Printing Doctor Name and Address

You can print a Doctor's name and address very flexibly in CareOffice from several locations within the program. You can customise the look of your envelopes and labels to suit your needs. The following discusses the various options of the Printing Envelopes/Labels feature.

Choosing the Printer

CareOffice will always send any print jobs you have requested to the printer selected in the Printer Setup. To select the printer, follow the following steps:

1. Click on the **File** menu item on the CareOffice main desktop
2. Click on **Printer Setup** as shown below.

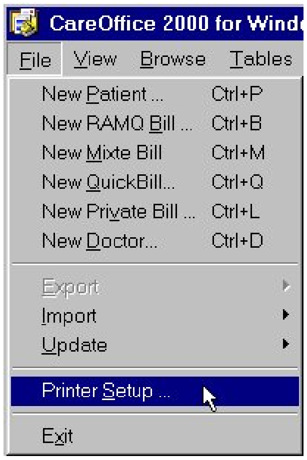


Figure 116 — File, Printer Setup…

3. Select the printer of your choice by clicking on the down arrow next to the printer **Name:** and then highlighting the printer.

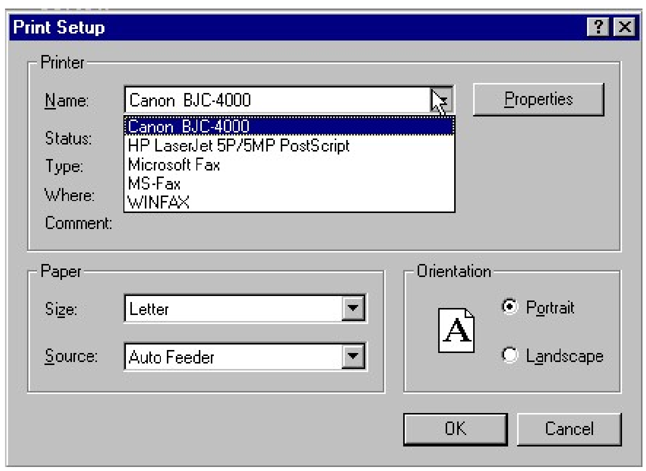


Figure 117 — Print Setup

4. Click on the **OK** button when done.

Selecting Print

CareOffice allows you to print envelopes or address labels from three different areas in the program; from the **Doctor Card**; from the **Doctor Information** window or from the CareOffice Main Desktop.

Printing from the Doctor Card

Once you've chosen the correct default printer click on the **Printer** icon at the bottom of the **Doctor Card** to print envelopes or labels.

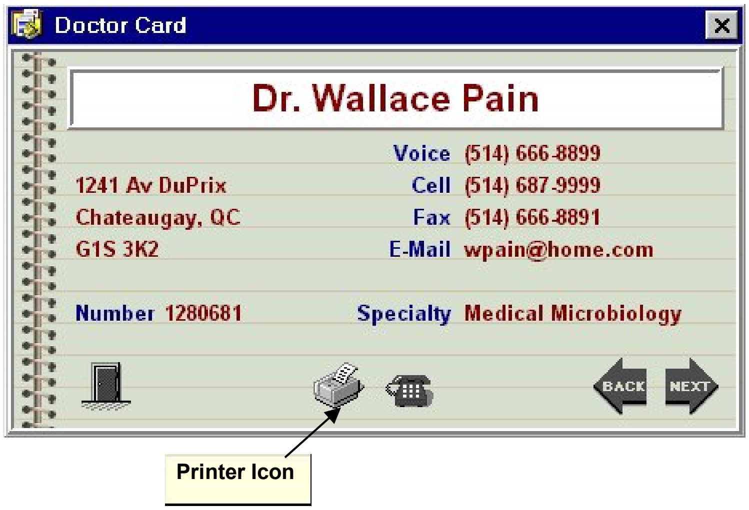


Figure 118 — Printing from the Doctor Card

Printing from the Doctor Information Window

You can also print labels from the **Doctor Information** window by clicking on the **Print** button as illustrated in the following figure.

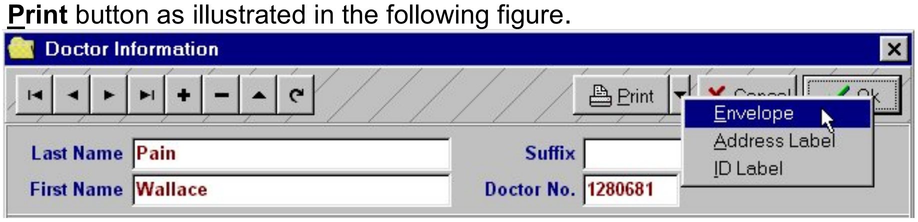


Figure 119 — Printing from Doctor Information

Printing from the CareOffice Main Desktop

While viewing **Doctors** on the CareOffice Main desktop you can right click on any of the Doctor Information boxes and select **Print** as shown in the following figure.

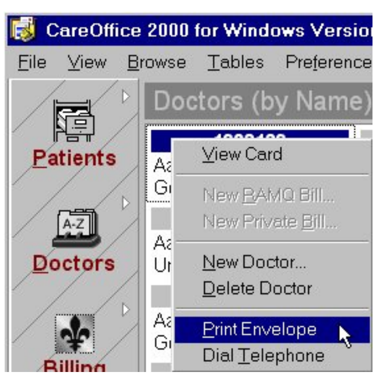


Figure 120 — Printing while viewing Doctors on desktop

Once you've selected Print you will see the **Print Envelopes/Labels** window as in the example above.

Printing Options

If you choose to print from the **Doctor Card**, the **CareOffice Main Desktop** or from the **Doctor Information** window you will see a window similar to the following where you can choose from amongst many options to customise the look of your envelopes and labels.

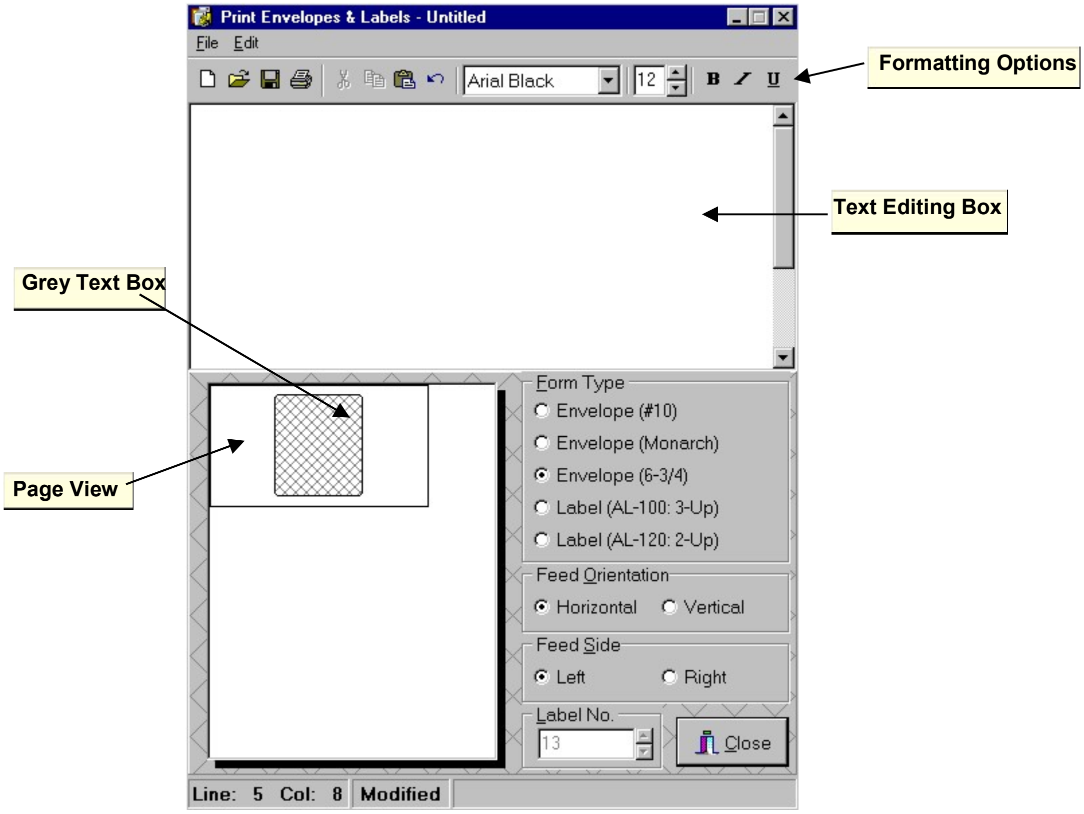


Figure 121 — Printing Options

File Operations

CareOffice also allows you to save the information in the **Print Envelopes & Labels** window to be printed at a later time. To do this click on the **Save File** icon and give the file a name in the **Save As** dialogue box. When you want to open that file later just click on the Open Existing File icon to locate the file to be printed.

You can also create a new file with name and address information to be printed or saved by clicking on the **New File** icon. When you do this, the **Text Box** will be cleared of all information.

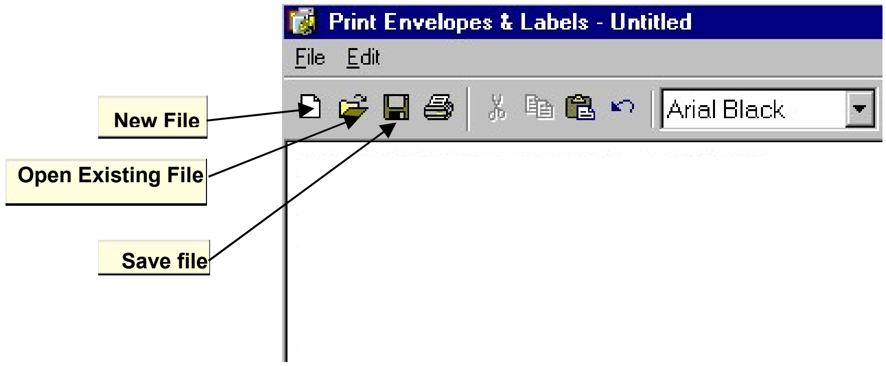


Figure 122 — File Operations in Print Envelopes & Labels

Editing Text in the Print Box

When you move your mouse on top of the **Text Editing Box** you will notice that the cursor changes from an **arrow** to an **I Bar**.

You can change the contents of the **Text Editing Box** by simply positioning the **I Bar** over the text and then click and drag – while holding down the mouse button – over the text to be changed. Then type in the correct information.

To add additional text to the **Text Editing Box**, position the **I Bar** at the location where the new text is to be added and then click and type.

N.B. The **Grey Text Box** will show you where the text will be printed on the label or envelope chosen. If the **Grey Text Box** is larger than the envelope or label you will want to change the font type or font size to make it fit into the required space.

Editing Tools

As shown below, at the top of the **Print Envelopes & Labels** window some editing tools are provided for your convenience.

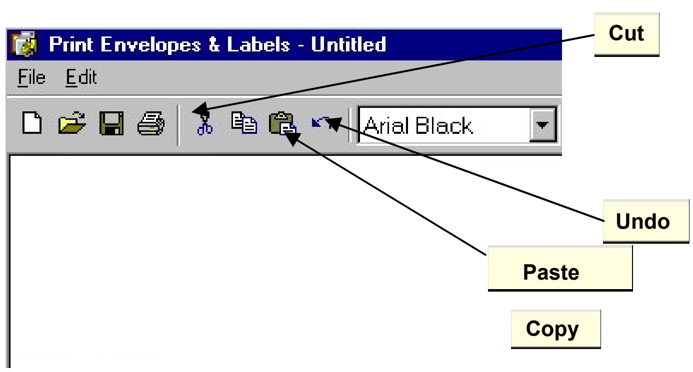


Figure 123 — Editing Tools in Print Envelopes & Labels

If you highlight a word or group of words in the **Text Editing** box you will notice that all the editing tools are activated. If you then click on the **Cut** icon the text will be deleted. Clicking on the **Copy** icon will copy the selected text to the clipboard. Clicking on the **Paste** icon will paste the clipboard's contents where the blinking **I** Bar is located over will replace the highlighted text with the clipboard's contents. The **Undo** icon will undo the last action whether it is cutting, typing, changing font or font attributes. If the **Undo** icon is greyed out it cannot be used at this time.

Formatting Text in the Print Box

The following figure illustrates the various formatting options available.

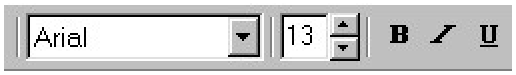


Figure 124 — Formatting Options

To change the font click on the down arrow next to the font name and select the font you wish. To change the size of the font click on the down or up arrow next to the font size and select the font size you want. Any changes to the font used or the font size will apply to all the text in the **Text Box** if no text has been selected. If you have highlighted a word or group of words the font change will apply to that selection only.

You can also change the attributes of the text to include bold, Italic or underline. Simply highlight all or part of the text and click on the Bold, Italic or Underline symbols.

Setting a Default Fault

If you usually use the same font you may want to set it as the default. To do this

1. Click on **Edit**
2. Select **Set Default Font…** as shown in the figure below

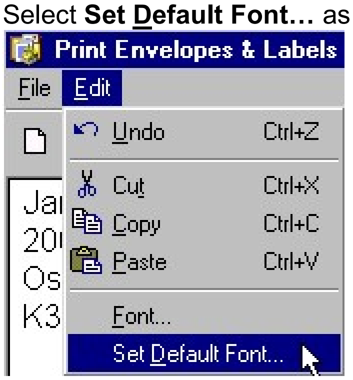


Figure 125 — Set Default Font…

You will see a window similar to the following where you can select your default font.

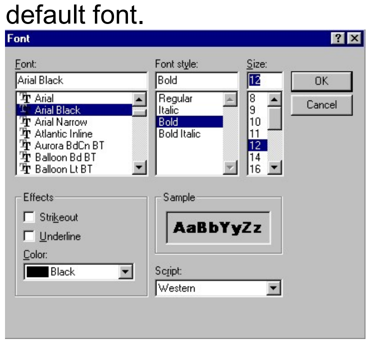


Figure 126 — Select Font Attributes

3. Use the mouse arrow to highlight the font and other font attributes you would like to make default.
4. Click on the **OK** button.

Changing the Form Type, Feed Orientation and Feed side

The **Form Type** Box allows you to select the type of paper or envelope the Text Box's contents will be printed on. You can choose from 3 envelope sizes and two types of label paper. Click on the various radio buttons and watch the **Page View** change. Notices that if you select a type of Label paper the **Feed Orientation** and **Feed Side** options will be greyed out and is not selectable.

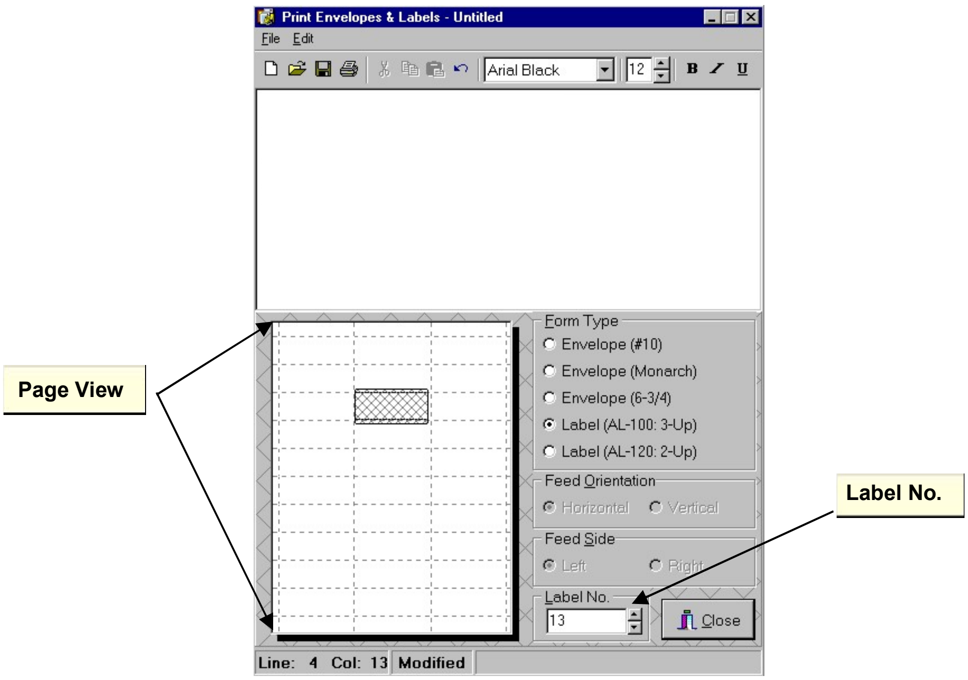


Figure 127 — Changing the Form type

The illustration above shows that the **Page View** shows the text will be printed on the third label down from the top. The **Label No.** option controls the position of the text to be printed. You can choose to print anywhere on the label paper by simply changing the number in this box by either typing in the number or using the up and down arrows to the right of the number.

Feed Orientation allows you to select to feed in the envelope either horizontally or vertically. This is best illustrated in the figure below.

Feed Side controls which side of the printer you will be feeding the envelope.

The use of the **Feed Orientation** and **Feed Side** options is illustrated in the figures below.

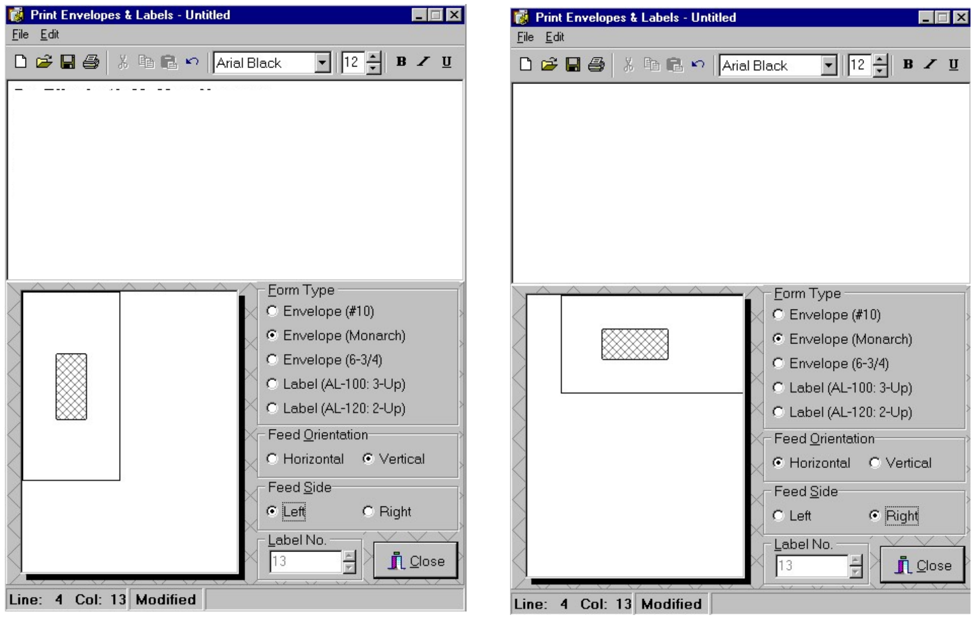


Figure 128 — Feed Orientation and Feed Side

Print Current File

When you are ready to print click on the printer icon.

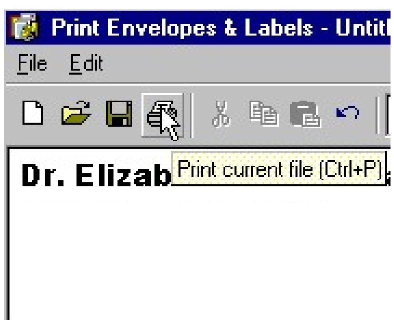


Figure 129 — Ready to print

Chapter 4

Billing

Billing Module Overview

This module is used to create and track the payment of both private and RAMQ bills. The government provides tables of billing codes and their error checking values. You will use these codes to create your bills. CareOffice will then allow you to automatically submit all claims not previously submitted and reconcile the RAMQ claim. You can also print the private bills for presentation to the patient.

In this chapter we will cover the tables used in billing, creating and printing a bill, browsing through the bills and tracking the payment of a bill.

Tables

The Tables used in the creation of a bill can all be accessed from the main menu of CareOffice as in the following illustration.

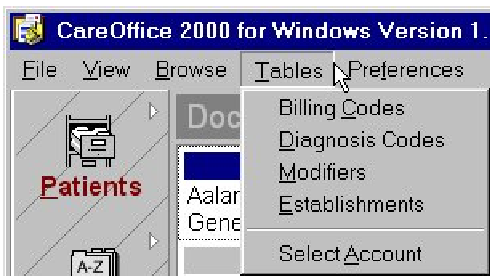


Figure 130 — Tables Used in Bill Creation

Billing Codes

The **Billing Codes** are provided to Carefile by the government and are a part of the CareOffice installation. As the Billing Codes are continually updated by the government CareOffice provides you with the means to manually change the values or add more codes as the requirement presents itself. Customers with a support contract from Carefile will automatically receive all Billing Code updates as they are required which will replace the table in use with the newer one in effect.

You may access the Billing Codes table from the CareOffice main desktop as shown in the following illustration.

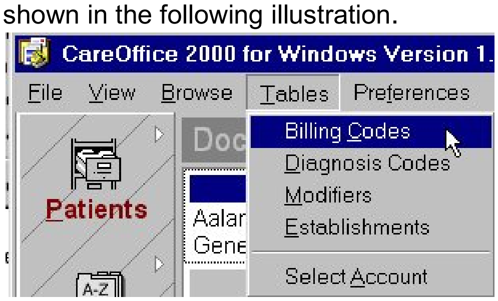
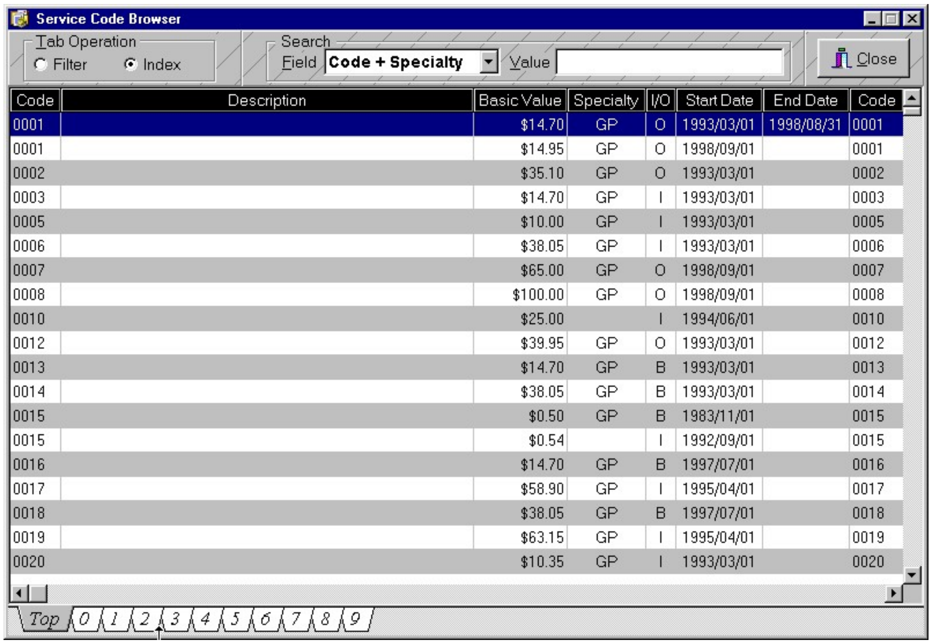


Figure 131 — Accessing Billing Codes

The **Billing Codes** table or Service Code Browser is similar to the following figure. An explanation of all the parts of the table and how the various fields are updated will follow.

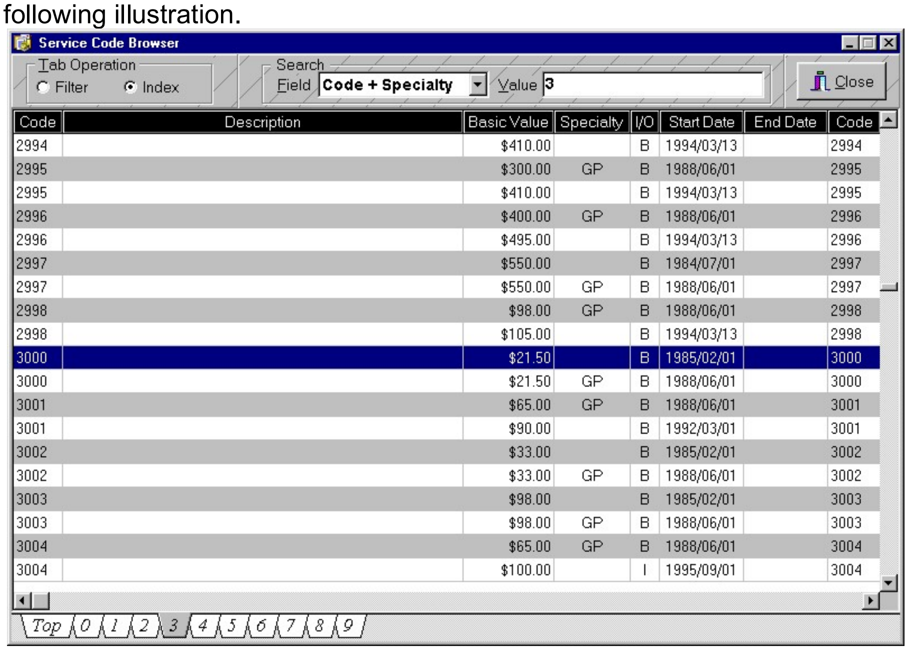


Code	Description	Basic Value	Specialty	I/O	Start Date	End Date	Code
0001		$14.70	GP	O	1993/03/01	1998/08/31	0001
0001		$14.95	GP	O	1998/09/01		0001
0002		$35.10	GP	O	1993/03/01		0002
0003		$14.70	GP	I	1993/03/01		0003
0005		$10.00	GP	I	1993/03/01		0005
0006		$38.05	GP	I	1993/03/01		0006
0007		$65.00	GP	O	1998/09/01		0007
0008		$100.00	GP	O	1998/09/01		0008
0010		$25.00		I	1994/06/01		0010
0012		$39.95	GP	O	1993/03/01		0012
0013		$14.70	GP	B	1993/03/01		0013
0014		$38.05	GP	B	1993/03/01		0014
0015		$0.50	GP	B	1983/11/01		0015
0015		$0.54		I	1992/09/01		0015
0016		$14.70	GP	B	1997/07/01		0016
0017		$58.90	GP	I	1995/04/01		0017
0018		$38.05	GP	B	1997/07/01		0018
0019		$63.15	GP	I	1995/04/01		0019
0020		$10.35	GP	I	1993/03/01		0020

Figure 132 — Service Code Browser

Tab Operation

The **Tab Operation** option at the top of the window is used to control how the Tabs at the bottom of the window work when searching on **Code + Specialty** or **Code.** It provides two choices, either Filter or Index. If you have **Index** selected and click on one of the numeric tabs at the bottom you will notice that the highlighted selection moves to the first code starting with that number as in the following illustration.



Code	Description	Basic Value	Specialty	I/O	Start Date	End Date	Code
2994		$410.00		B	1994/03/13		2994
2995		$300.00	GP	B	1988/06/01		2995
2995		$410.00		B	1994/03/13		2995
2996		$400.00	GP	B	1988/06/01		2996
2996		$495.00		B	1994/03/13		2996
2997		$550.00		B	1984/07/01		2997
2997		$550.00	GP	B	1988/06/01		2997
2998		$98.00	GP	B	1988/06/01		2998
2998		$105.00		B	1994/03/13		2998
3000		$21.50		B	1985/02/01		3000
3000		$21.50	GP	B	1988/06/01		3000
3001		$65.00	GP	B	1988/06/01		3001
3001		$90.00		B	1992/03/01		3001
3002		$33.00		B	1985/02/01		3002
3002		$33.00	GP	B	1988/06/01		3002
3003		$98.00		B	1985/02/01		3003
3003		$98.00	GP	B	1988/06/01		3003
3004		$65.00	GP	B	1988/06/01		3004
3004		$100.00		I	1995/09/01		3004

Figure 133 — Indexed Tabs of Service Code Browser

If you have **Filter** selected and click on one of the numeric tabs at the bottom you will notice that the tab selected shows only the codes starting with that number as in the following illustration. All the other codes are filtered out.

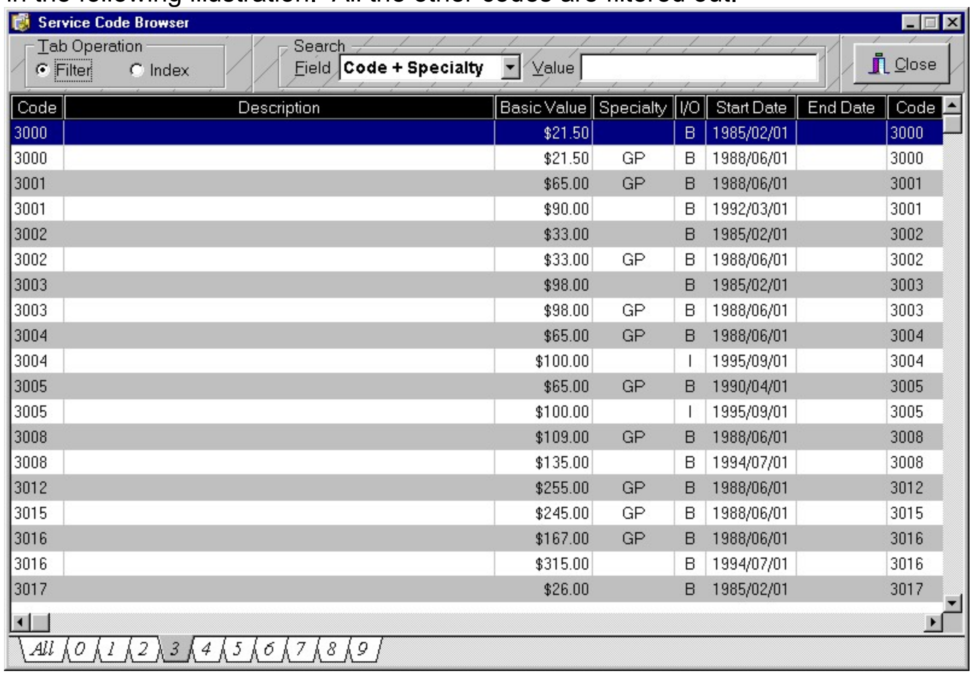


Figure 134 — Filtered Tabs of the Code Browser

Search

In the search area of the Service Code Browser are four inputs you can provide CareOffice with to narrow and speed up the search through the thousands of billing codes available.

In **Field** there are several selections as illustrated in the following figure.

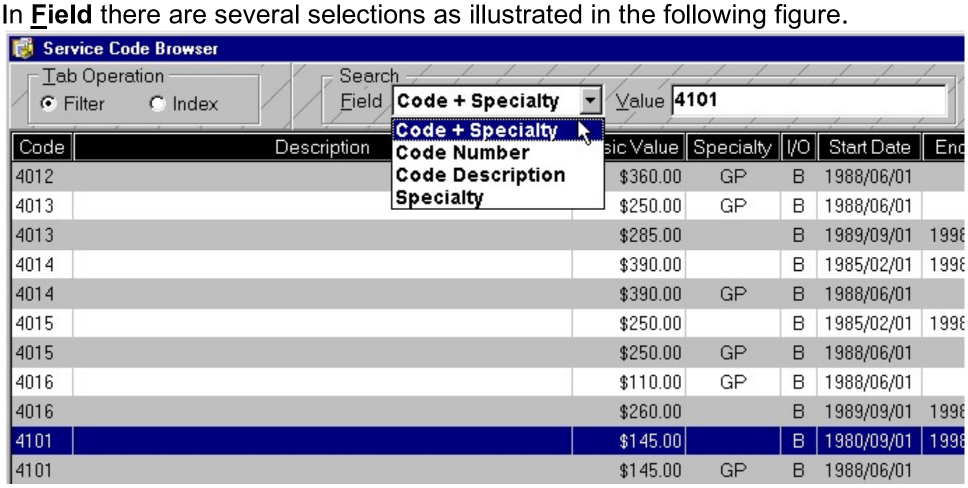


Figure 135 — Search Options of the Service Code Browser

Code + Specialty will sort the billing code database first on the billing code and then on the Specialty. If you want to search for a specific code value then you must insert that value into the **Value** box.

Code Number will sort the database using the billing code as the only search key.

Code Description will sort the billing code database alphabetically according to the contents of the **Description** field. *Note that there are no descriptions in the above example, as this is how the billing codes are presented to Carefile from the Quebec government. You may however insert your own descriptions if you wish.*

Specialty will sort the database alphabetically in ascending order according to the Specialty assigned to the billing code.

Table Column Headings

Figure 136 — Column Headings of Service Code Browser

Code refers to the 4 digit Billing Code for a service as assigned by the government.

Description is a text field 40 characters in length which you may use to assist you in identifying or search on the various billing codes. The user may enter the descriptions if they wish.

Basic Value is the value for the service as assigned by the government. In the claim, this value may be increased or decreased by the use of modifiers.

I/O may have the value of **I** for an **I**npatient service, O for an Outpatient service, or B for Both. Some of the billing codes represent services, which may only be performed in the Hospital, and this field would then have a value of **I**. Some services will only be performed at the clinic or office and would have a value of O. Services, which can be performed, at both the clinic and the hospital would therefor contain a B in this field.

Start Date represents the date upon which this particular billing code became effective.

End Date represent the date upon which used of this particular code was discontinued.

Changing the Contents of the Table

All of the fields in the Billing Codes table are editable. You can also add new codes or delete codes your clinic doesn't use. To see the options available, right click anywhere on the table and the following pop up menu will appear.

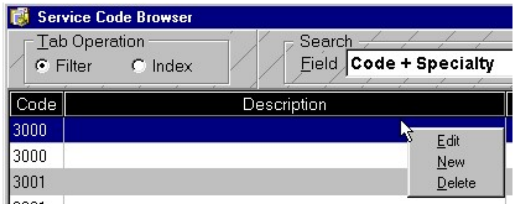


Figure 137 — Changing Billing Code Table Contents

If you select **Edit** the following screen will appear allowing you to make the necessary changes. Alternatively you can double click anywhere on the row containing the billing code you wish to change and you will also see the following window.

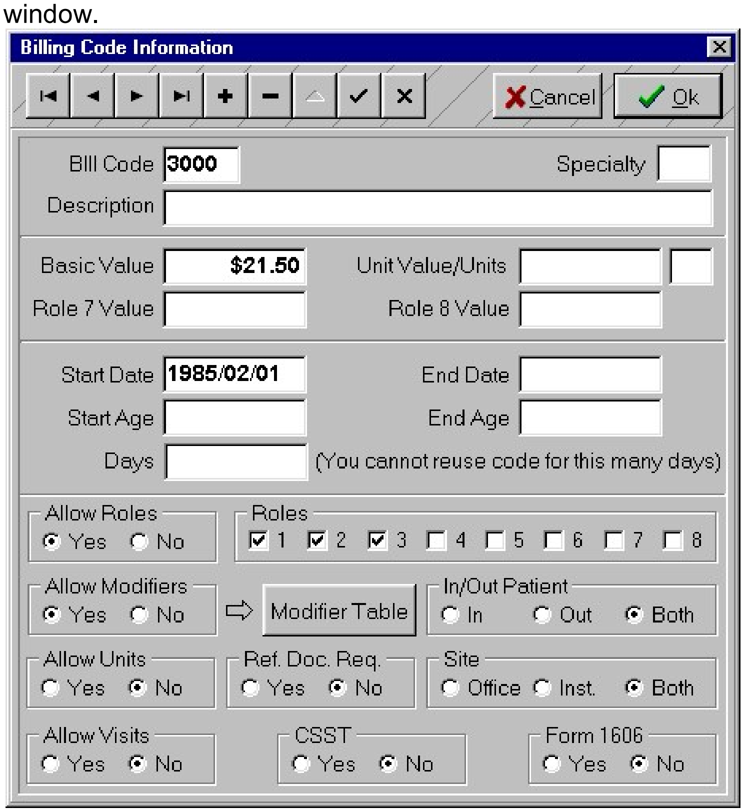


Figure 138 — Editing the Billing Code

If you have a support contract there are only 2 fields that should concern you; **Description** and **Days**. You will be sent regular updates from Carefile for all the other fields of the billing.

You can press the Tab key until you reach the **Description** box and then enter your description of this billing code.

Press the Tab key again until you reach the **Days** field. In here you would type in the number of days which must pass before this billing code could be used again.

When you've completed making the required changes you can press on the check mark or Post Edit button and then press on the arrow keys to go to another billing code to make changes there or you can press on the OK button to exit. No changes are recorded to disk until the OK button is clicked.

The following discussion will briefly define the other fields in the Billing Code Information to give you an overview of their functions.

The **Specialty** field is used to represent the various specialities in the Medical Industry. In it you will find codes like GP, or a two-character numeric representing the speciality. The government will supply you with a list of the speciality codes and what they represent. If there is nothing in the Specialty box it means that any physician of any particular speciality can use this billing code. If there is a Specialty listed in this box it means that only that particular billing code. Many codes have different fees depending on their speciality. So, for example you could have many billing codes of 9150 and only one for each speciality allowed.

The **Basic Value** represents the amount the government will pay the physician for the service provided under this billing code.

If there is a value in **Unit Value/Units** it means that the Basic Value of the service is for 1 unit of this service. If more than one unit applies to the billing code then there will be a dollar value associated here with the additional units.

Role 7 and **8** values represent different fees that must be used if the code is to be used with a modifier of 7 or 8. If there is a value in either of these boxes and you use this billing code in the Actes portion of the bill along with 7 or 8 in the Role position, CareOffice will automatically pickup the value in the Billing Code Information. The government dictates which roles may be used with which billing codes and what values they may have.

Start Date is the date at which this billing code was registered with the government.

End Date is the date at which this billing code was discontinued by the government.

Start Age indicates the age of the youngest patient for which this billing code may be used.

End Age indicates the age of the oldest patient for which this billing code may be used.

Days is the number of days before this billing code may be used again for a particular patient.

Roles are used by the government to modify the basic value and interpretation of a service rendered. If the Allow Roles indicates that Roles may be used for this billing code then the various roles allowed by the government for this code will have a check mark next to the Role number. An example of a role would be 4, which indicates that an assistant to the physician performed this service. In which case when the bill was prepared with Role 4 associated with the billing code for the Actes, then CareOffice would automatically calculate that the service should be billed at 25% of the regular physician's fee. If Role 4 was not flagged then this code cannot be used with Role 4

Modifiers also may be used with certain billing codes to modify the value of a particular service. Examples of modifiers would be services rendered on weekends or in the evenings whereby the value of the service would be increased or decreased somewhat. You can click on the Modifier Table button on the screen to view all of the modifiers that may be used with this particular billing code. If the modifier is not flagged then it cannot be used for that billing code. Please note that all 3-digit modifiers (i.e. those with a number of 100 or greater) have been hard coded into the CareOffice software so the user doesn't have to maintain them.

In/Out Patient refers to whether this service may be used for a patient that has been admitted to a hospital (In-patient) or is visiting the doctor at an office or hospital (Out-patient). If the **Both** button is checked then the billing code can be used for any kind of patient.

Allow Units refers to whether units are allowed to be billed in the Actes part of a RAMQ claim.

Ref. Doc. Req. represents Referring Doctor Required. Certain codes may only be used if another physician referred the patient to the specialist.

Site refers to whether this billing code can be used for services rendered only in an office, only at an institution (hospital) or at both sites.

Allow Visits refers to whether this billing code may be used in the Visits portion of the bill or must be used only in the Actes portion.

CSST refers to whether this service was rendered to a patient who was for example in an accident and therefor this would be a CSST billing code.

Form 1606 is used for Radiology. Instead of billing one claim at a time Radiology uses this form to sum up their claims, thereby saving time.

Diagnosis Codes

The **Diagnosis Codes** are provided to Carefile by the government and are a part of the CareOffice installation. As the Diagnosis Codes are continually updated by the government CareOffice provides you with the means to manually change the values or add more codes as the requirement presents itself. Customers with a support contract from Carefile will automatically receive all Diagnosis Code updates as they are required.

You may access the Diagnosis Codes table from the CareOffice main desktop as shown in the following illustration.

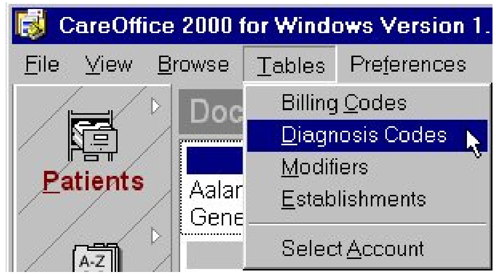


Figure 139 — Accessing Diagnosis Codes

The Diagnosis Codes table is similar to the following figure. An explanation of all the parts of the table and how the various fields are updated will follow.

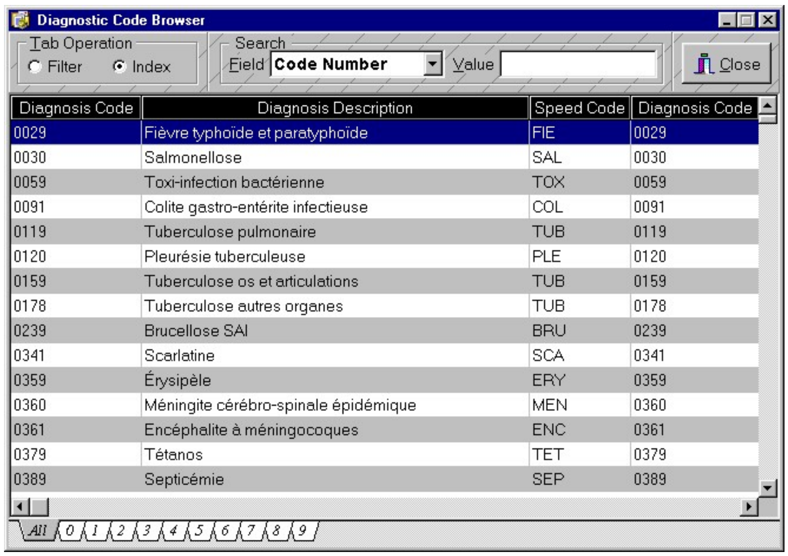


Figure 140 — Diagnostic Code Browser

Tab Operation

The **Tab Operation** option at the top of the window is used to control how the Tabs at the bottom of the window work when searching on **Code Number**. It provides two choices, either **Filter** or **Index**. If you have **Index** selected and click on one of the numeric tabs at the bottom you will notice that the highlighted selection moves to the first code starting with that number as in the following illustration.

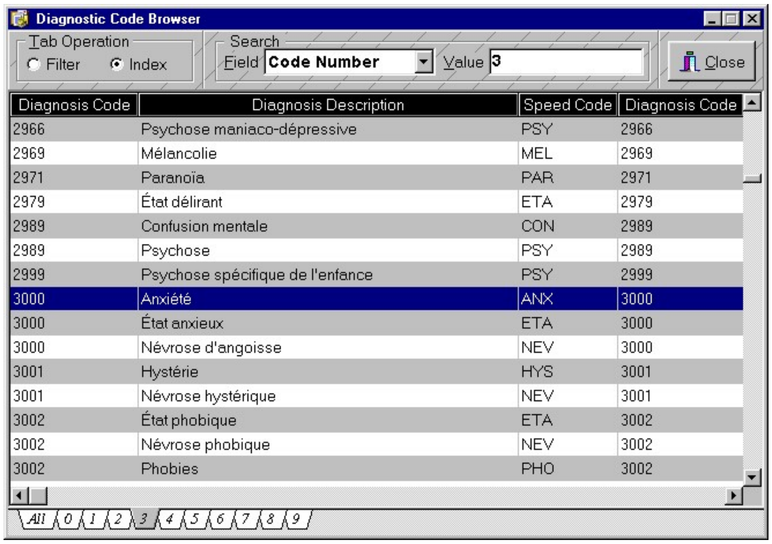
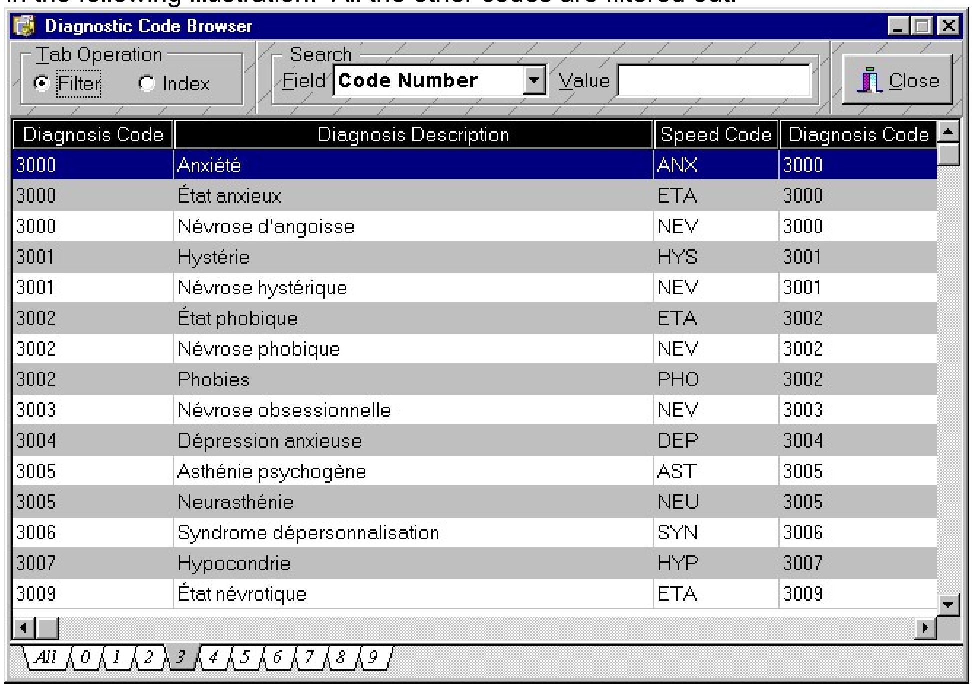


Figure 141 — Indexed Tabs of the Diagnostic Code Browser

If you have **Filter** selected and click on one of the numeric tabs at the bottom you will notice that the tab selected shows only the codes starting with that number as in the following illustration. All the other codes are filtered out.



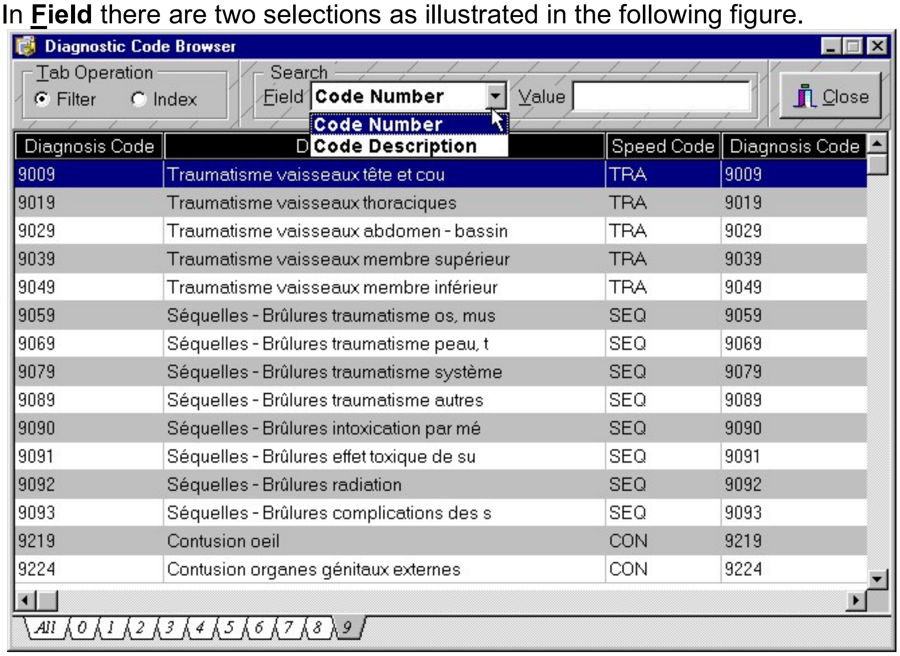
Diagnosis Code	Diagnosis Description	Speed Code	Diagnosis Code
3000	Anxiété	ANX	3000
3000	État anxieux	ETA	3000
3000	Névrose d'angoisse	NEV	3000
3001	Hystérie	HYS	3001
3001	Névrose hystérique	NEV	3001
3002	État phobique	ETA	3002
3002	Névrose phobique	NEV	3002
3002	Phobies	PHO	3002
3003	Névrose obsessionnelle	NEV	3003
3004	Dépression anxieuse	DEP	3004
3005	Asthénie psychogène	AST	3005
3005	Neurasthénie	NEU	3005
3006	Syndrome dépersonnalisation	SYN	3006
3007	Hypocondrie	HYP	3007
3009	État névrotique	ETA	3009

Figure 142 — Filtered Tabs of the Diagnostic Code Browser

Search

In the search area of the Diagnostic Code Browser are two inputs you can provide CareOffice with to narrow and speed up the seach through the thousands of billing codes available.

In **Field** there are two selections as illustrated in the following figure.



Diagnosis Code	D	Speed Code	Diagnosis Code
9009	Traumatisme vaisseaux tête et cou	TRA	9009
9019	Traumatisme vaisseaux thoraciques	TRA	9019
9029	Traumatisme vaisseaux abdomen - bassin	TRA	9029
9039	Traumatisme vaisseaux membre supérieur	TRA	9039
9049	Traumatisme vaisseaux membre inférieur	TRA	9049
9059	Séquelles - Brûlures traumatisme os, mus	SEQ	9059
9069	Séquelles - Brûlures traumatisme peau, t	SEQ	9069
9079	Séquelles - Brûlures traumatisme système	SEQ	9079
9089	Séquelles - Brûlures traumatisme autres	SEQ	9089
9090	Séquelles - Brûlures intoxication par mé	SEQ	9090
9091	Séquelles - Brûlures effet toxique de su	SEQ	9091
9092	Séquelles - Brûlures radiation	SEQ	9092
9093	Séquelles - Brûlures complications des s	SEQ	9093
9219	Contusion oeil	CON	9219
9224	Contusion organes génitaux externes	CON	9224

Figure 143 — Search Options of the Diagnostic Code Browser

Code Number will sort the diagnostic code database in ascending numerical order. If you want to search for a specific code value then you must insert that value into the **Value** box.

Specialty will sort the diagnostic code database in ascending alphabetical order. If you want to search for a specific code description then you must insert that value into the **Value** box.

Table Column Headings

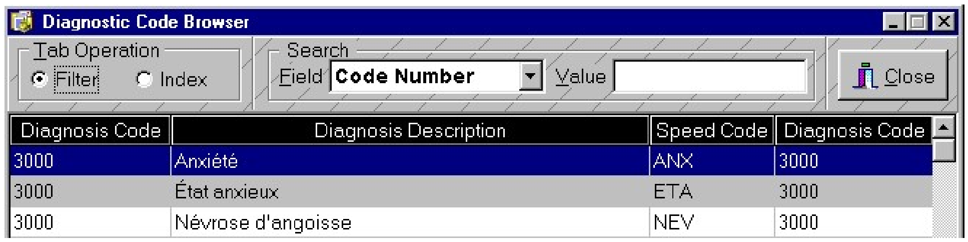


Figure 144 — Column Heading of the Diagnostic Code Browser

Diagnosis Code refers to the Diagnostic Code for this diagnosis as assigned by the government.

Diagnosis Description is a text field 40 characters in length which you may use to assist you in identifying or search on the various dignostic codes. *You will note that the diagnosis descriptions are all in French as this is how the Quebec government provides them to Carefile. These descriptions may easily be changed to English or to another language if you prefer and we'll cover editing later in this chapter.*

Speed Code is used to increase the speed of the database sort. When CareOffice is installed the Speed Code used by the system will consist of the first 3 letters of the diagnosis. The user can change the speed code to help them more quickly find the diagnosis they are looking for in the future.

Changing the Contents of the Table

All of the fields in the Diagnosis Codes table are editable. You can also add new codes or delete codes your clinic doesn't use. To see the options available to you right click anywhere on the table and the following pop up menu will appear.

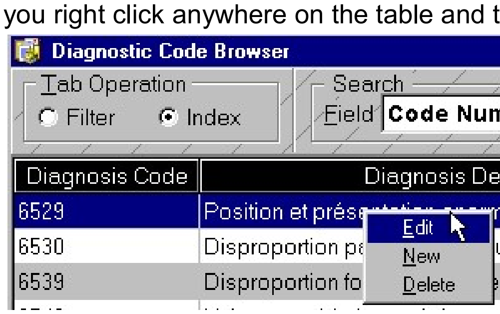


Figure 145 — Changing Diagnostic Table Contents

If you select **Edit** the following screen will appear allowing you to make the necessary changes. Alternatively you can double click anywhere on the row containing the diagnostic code you wish to change and you will also see the following window.

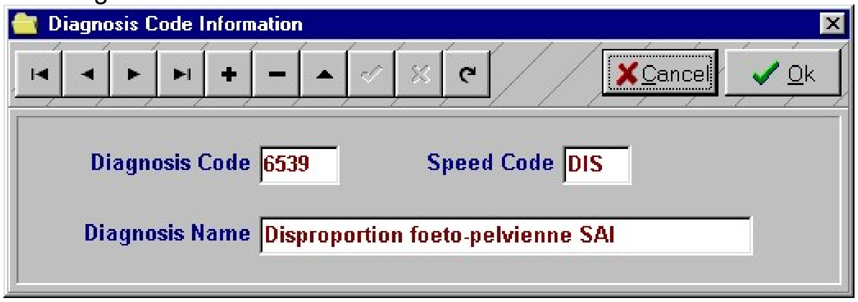


Figure 146 — Editing the Diagnosis Code Information

You can press the Tab key to go to any of the input fields to change their contents. Once you have finished you can click on the check mark to save the changes and then use the arrow keys to view other diagnoses which you can edit or delete if you wish. No changes will be saved to disk until you press on the OK button to exit this window.

Modifiers

The **Modifiers** are provided to Carefile by the government and are a part of the CareOffice installation. If the government updates the Modifiers, the user can manually change the values or add more codes as the requirement presents itself. Customers with a support contract from Carefile will automatically receive all Modifier updates as they are required which will replace the table in use with the newer one in effect.

You may access the Modifiers table from the CareOffice main desktop as shown in the following illustration.

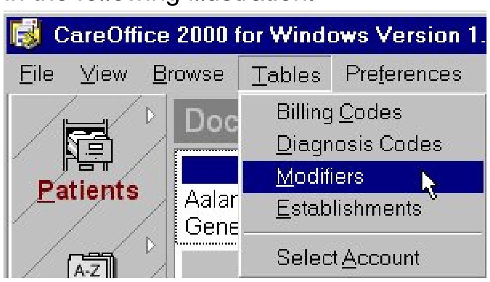


Figure 147 — Accessing Modifiers

The **Modifier Table** is similar to the following figure. An explanation of all the parts of the table and how the various fields are updated will follow.

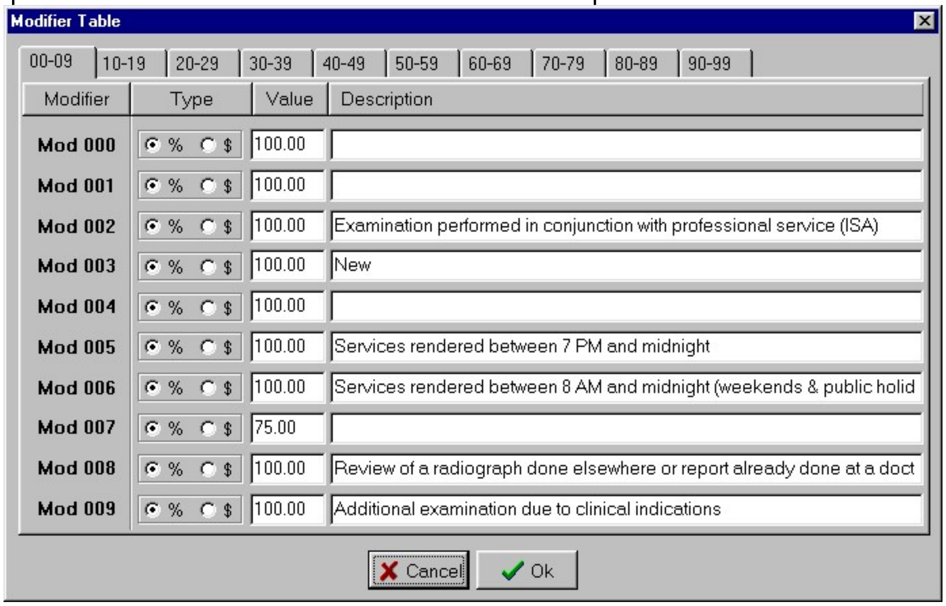


Figure 148 — Modifier Table

The Tabs at the top of the window allow you to see the modifiers in groups of 10. To see a different group than the one displayed simply click on the tab representing the group in which the modifier you are looking for may be found.

The following explains what the various column heading represent.

Modifier – Modifier code number

Type – May have a value of % or $. The Basic Value of a service will be some percentage of its original value if the radio button next to the % sign is selected. The Basic Value of a service will be replaced if the radio button next to the $ sign is selected.

Value – If the Type is % then the number in the Value field represents the percentage which must be multiplied by the Basic Value of a service to determine the modified value. For example Mod 7 has a % of .75 which means that when this modifier is used in conjunction with a billing code the modified value of the service will be 75% of the original Basic Value.
If the Type is $ then the number in the Value field represents the modified value of the Basic Value of a service.

Description – This field contains the descriptions provided to Carefile by the Quebec government. You can use more than 100 characters to describe any of the modifiers in this table.

Changing the Contents of the Table

The Modifier Table is also a part of the CareOffice installation with information given to Carefile by the government. If you have a support contract with Carefile for your software then you will receive all updates and will probably only want to make changes to the Description field to make the modifiers easier to remember

and identify or to otherwise suit your personal preferences. It is not recommended that you modify the other field in this table.
All of the fields in the Modifier Table are editable. To change the **Type** simply click on the other radio button. To change the **Value** or the **Description**, highlight the current value and type in the replacement. No changes are written to disk until the OK button is pressed to exit the window.

Establishments

The establishments associated with billing are the hospitals or clinics the doctors have admitting privileges at or work in. As the establishment associated with a claim must be identified to the government when making the claim it is important that the establishment information is correctly recorded.

To access the Establishments database, click Tables and select Establishments as in the following illustration.

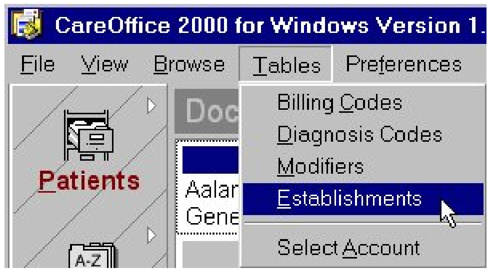


Figure 149 — Accessing Establishments

The Establishment Information window is similar to the following figure. Each record of the Establishment database may be updated in the same manner as in the Patient Demographics or Doctor Information windows. An explanation of all the fields in the database follows.

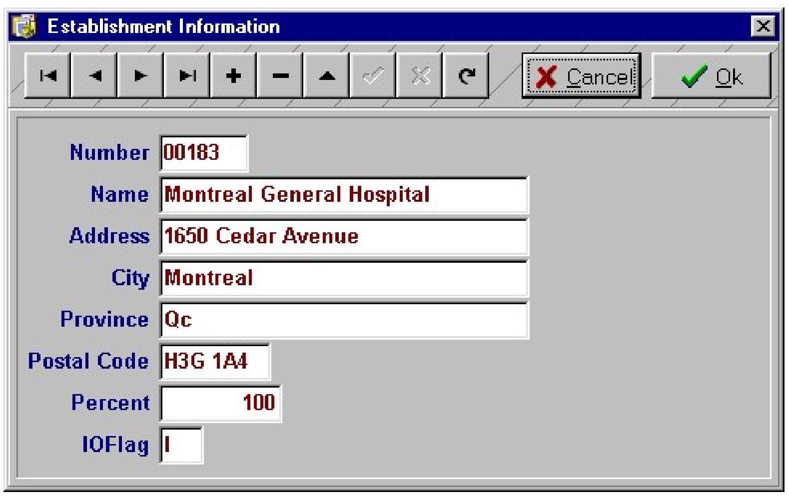


Figure 150 — Establishment Information

Number is a unique number assigned to the establishment by the government.

Name, **Address**, **City**, **Province** and **Postal Code** represent themselves.

Percent is the percentage value of the Basic Value for a billing code that a physician will receive if the service was rendered at this establishment.

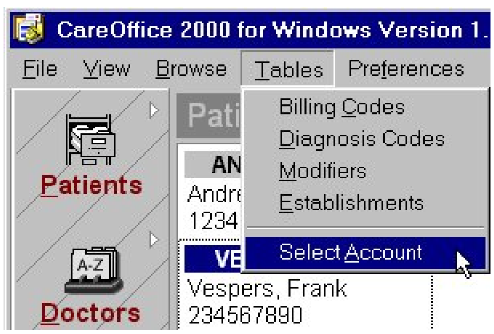
IOFlag indicates whether the physician usually sees his patients at this establishment on an Inpatient or Outpatient basis.

Select Account

CareOffice provides a practice the flexibility to allow the physicians to bill under a group or privately. When CareOffice is installed the Carefile representative will discuss with you the billing practices of your office and configure the necessary groups.

For billing purposes a physician may have a private account for private or non-governmental billing and may also belong to one or more billing groups. When a physician bills the government as part of a group the government pays the group. The group may then divide the payment as per any existing agreement.

It is important to select the appropriate billing account when creating or sending bills. To access the accounts, click **Tables** and choose **Select Account** as in the following illustration.



Creating and Printing a Bill

CareOffice allows for the creation of RAMQ or government bills or private bills where the patient pays the clinic or practice directly.

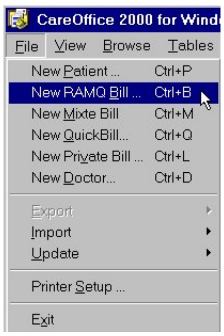
RAMQ Billing

RAMQ Billing may be accessed in several different ways.

Choose **New RAMQ Bill** or **New QuickBill…** from the **File** menu on the desktop

Right-click on the patient's name from the Patient Browser on the desktop and choose either **NEW RAMQ Bill** or **New QuickBill**

Click on **$RAMQ** on the Patient Demographics screen



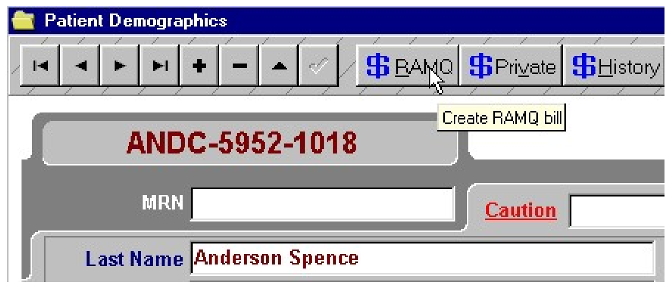


Figure 151 — Creating RAMQ bill from Patient Demographics

Figure 152 — Accessing New RAMQ Bill from CareOffice desktop

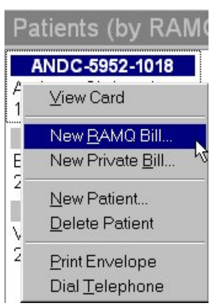


Figure 153 — Right Click on Patient in Patient Browser

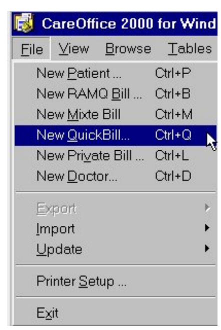


Figure 154 — Accessing New RAMQ Bill from CareOffice desktop

If you choose to create the RAMQ bill from the Patient Demographics window then all the relative information will be transferred from the patient's record onto the RAMQ bill.

If you choose to create a **New RAMQ Bill** from the desktop, once you input the patient's RAMQ number, if this patient is in the database, all the relevant fields will be input automatically onto the bill.

If the patient is not in the database and you choose **New QuickBill** from the File menu, you may manually insert the patient's demographics into a RAMQ bill. When the claim has been completed the patient database will be updated to include the new patient's information.

Components and Features of RAMQ Billing Window

The New RAMQ Bill resembles the following illustration.

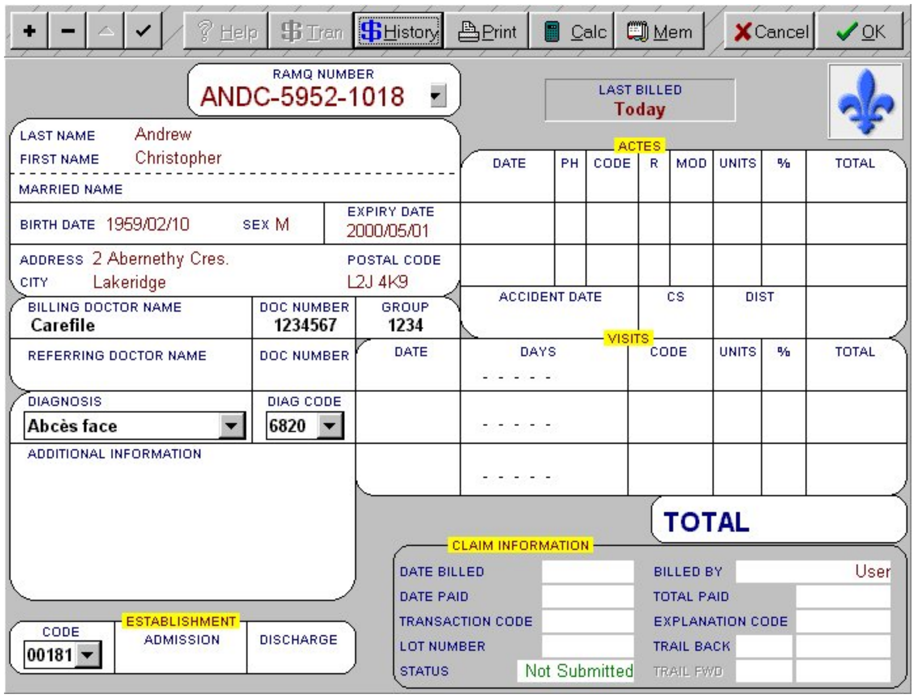
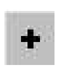
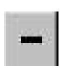


Figure 155 — New RAMQ Bill

The following explains the various different features of the RAMQ bill.



Insert Record – If you click on this button after editing a new RAMQ bill it will be assumed that you want to save your changes and a new record will be inserted.



Delete Record – Clicking on this button will cause the record currently on the screen to be deleted from the patient database. You will not be asked to confirm that you want to delete the current record on screen if you press this button.

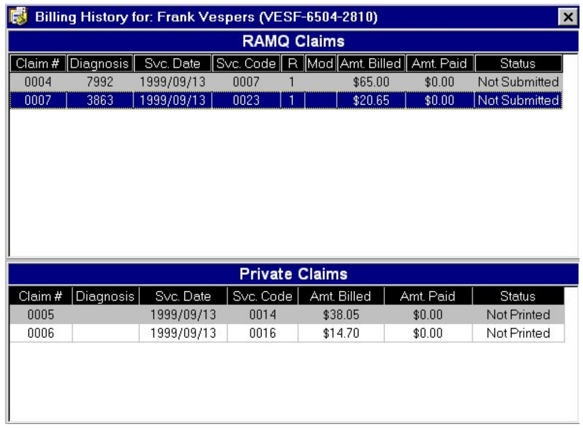
Edit Record – Clicking on this button will allow you to edit the record displayed.

Post Edit saves the changes made in **Edit** mode to the current record. At this point you can proceed to make other changes but the data is not actually written to disk until you click on the form's OK button. This allows you to batch a number of transactions together and commit them to disk all at the same time.

? Help will provide you with assistance in bill creation in a later version of CareOffice. This feature has not yet been implemented.

$ Tran is used to mark a bill as being paid. The RAMQ bills will be marked as being paid after they have been reconciled.

$ History when clicked will automatically display the billing history for the patient whose name is currently displayed. This is an important feature because it can be used to look up diagnosis and billing codes used in the past and may be a time saver for the creation of a bill pertaining to continued treatment of a particular condition. This feature may also be used to quickly determine for example when the date of the last general check-up was performed.


Billing History for: Frank Vespers (VESF-6504-2810)

RAMQ Claims

Claim #	Diagnosis	Svc. Date	Svc. Code	R	Mod	Amt. Billed	Amt. Paid	Status
0004	7992	1999/09/13	0007	1		$65.00	$0.00	Not Submitted
0007	3863	1999/09/13	0023	1		$20.65	$0.00	Not Submitted

Private Claims

Claim #	Diagnosis	Svc. Date	Svc. Code	Amt. Billed	Amt. Paid	Status
0005		1999/09/13	0014	$38.05	$0.00	Not Printed
0006		1999/09/13	0016	$14.70	$0.00	Not Printed

The Billing History for a particular client will show all relevant RAMQ and Private claims.

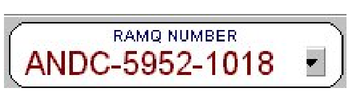
Print will print a copy of the bill.

Calc will access and display the Windows Calculator accessory.

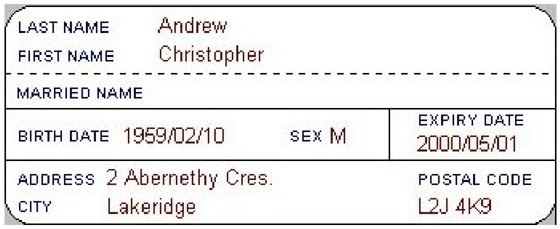
Mem will memorise and allow you to apply a name to the type of bill just created. This is also a time saver for creating bills for standard office visits or other types or services a physician frequently performs. When more than one claim type has been memorised you can click on the **Mem** button to see a scrolling list of the claim types available and then highlight the claim. The memorised claim will automatically be inserted onscreen with the current date. It can then be edited in the normal fashion.

Clicking on the **OK** button will save to disk all the changes you've made while in the **RAMQ Billing** screen and exit.

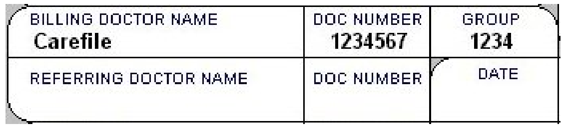
Clicking on **Cancel** will exit the **RAMQ Billing** screen without saving any changes made. You will be warned that changes have been made and if you exit these changes will be lost.



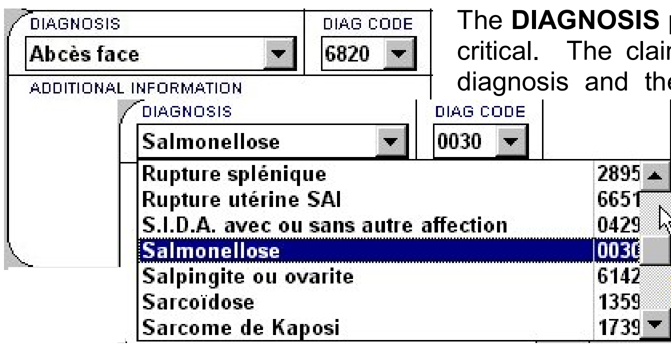
The information displayed in this box and in the patient information box directly below it comes directly from the patient card when $RAMQ is selected to create a new claim for that patient. To create a claim for a different patient simply click on the down arrow to the right of the RAMQ Number displayed. A list of the RAMQ Numbers available to choose from will appear. Select the correct RAMQ Number and the demographics for the patient, which corresponds to that number will be automatically inserted into the patient information box.



The patient's demographics are brought directly from the Patient Card into the RAMQ bill.



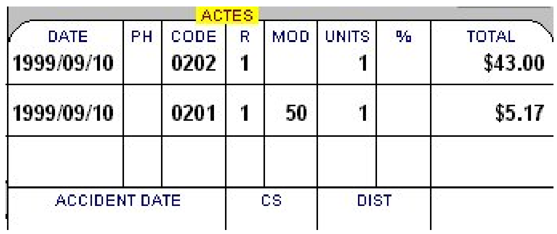
Information regarding the consulting and referring physicians will also be transferred from the patient card directly to the bill. If no information regarding the consulting and referring physicians is present on the Patient Card the information can be typed here directly. There may also be a need to replace the name of the consulting doctor with the name of another doctor in the practice. Simply click on the text box, highlight the existing information to delete it if necessary, and type the correct information. N.B. The **BILLING DOCTOR NAME** may also be the name of a group of doctors who have agreed to submit their claims to the government as a group rather than individually.



The **DIAGNOSIS** part of the RAMQ claim is critical. The claim must contain both the diagnosis and the diagnosis code before the claim will be accepted by the Regie for payment. You can choose a **DIAGNOSIS** or **DIAG CODE** by clicking on the down arrows to the right of these scrolling fields. If it's more convenient the user may also simply click in the **DIAGNOSIS** field and start typing the first few letters of the diagnosis and the software will fill in the rest of the diagnosis description. You may also want to type in any additional information required by clicking in the box labelled **ADDITIONAL INFORMATION** and inserted the desired text. Alternatively you can click in the field and type the correct information. Additional information is usually used when the government requires more information about the procedures performed. This is most frequently required with surgical operations. When it is necessary to resubmit a claim CareOffice will automatically input the previous claim number and the lot or submission number in **the ADDITIONAL INFORMATION** box. The software will also put in a **B** in the **CS** box of the **ACTES** portion of the claim when a claim is a resubmission of a previous claim.

ESTABLISHMENT details are required if the patient was seen in the hospital or another government recognised establishment, other than the doctor's office. The establishment code will default to the first establishment on the list of establishments created during setup. This should be the establishment most frequently used by your practice. You can select another establishment by clicking on the down arrow to the right of the scrolling field and beneath **CODE**. The date of admission and discharge must also be completed before claim submission. These are text entry boxes where you can simply click to start typing. When you click in the **ADMISSION** box, the system will automatically insert the current date. If it needs to be changed you can simply click on the text and replace it. Note that the format of the date is standardised to be year/mm/dd.

CareOffice will automatically insert the date of the last bill or claim in the **LAST BILLED** box. The user can then click on the **$HISTORY** button to see the details of the last claim.



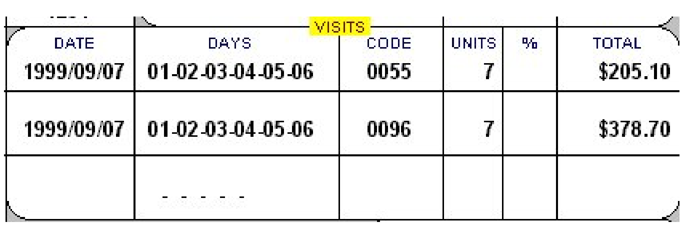
The user must have entered information in at least one line in either the **VISITS** or **ACTES** part of the RAMQ claim. If you click on the area below **DATE** the system will automatically insert today's date or the date of admission. The date may be changed if necessary. If the Date in either the **VISITS** or **ACTES** portion is changed the system will remember the change and will insert the new date into any subsequent claims

The service code must be input under **CODE**. CareOffice provides extensive error checking. If the user tries to input a service code that isn't allowed for a particular speciality, establishment or which will cause the amount of the claim to exceed the maximum allowed the software will warn the user. It will also attempt to provide the user with a suitable substitute code to insert in the event there is an acceptable code that closely matches. If you double click the left mouse button in the box under **CODE** the **Service Code Browser** will automatically be activated. The user can then locate the appropriate service code, double left click the mouse button anywhere on the row pertaining to that service code and the system will return to the RAMQ bill and insert that service code into the appropriate area.

By clicking in the **UNITS** area, the user may change the number of units if necessary. CareOffice will check with the Billing Codes table to determine whether units may be used with this particular service and will notify the user if they may not.

CareOffice will automatically compute the total amount of each row in **VISITS** and **ACTES** and calculate the total amount of the claim.

If this claim is a resubmission of a previous claim the software will automatically insert a **B** in the **CS** field.



The user must have entered information in at least one line in either the **VISITS** or **ACTES** part of the RAMQ claim. If you click on the area below **DATE** the system will automatically insert today's date or the date of admission. The date may be changed if necessary. If the Date in either the **VISITS** or **ACTES** portion is changed the system will remember the change and will insert the new date into any subsequent claims.

Under **DAYS** the user can input up to 6 dates, which including the day of **DATE** will total 7 days of visits during a week of hospitalisation where the same service was performed during each visit.
The service code must be input under **CODE**. CareOffice provides extensive error checking. If the user tries to input a service code that isn't allowed for a particular speciality, establishment or which will cause the amount of the claim to exceed the maximum allowed the software will warn the user. It will also attempt to provide the user with a suitable substitute code to insert in the event there is an acceptable code that closely matches. If you double click the left mouse button in the box under **CODE** the Billing Codes Browser will automatically be activated. The user can then locate the appropriate service code, double left click the mouse button anywhere on the row pertaining to that service code and the system will return to the RAMQ bill and insert that service code into the appropriate area.

By clicking in the **UNITS** area and typing over the existing information, the user may change the number of units if necessary. CareOffice will check with the Billing Codes table to determine whether units may be used with this particular service and will notify the user if they may not.

CareOffice will automatically compute the total amount of each row in **VISITS** and **ACTES** and calculate the total amount of the claim.

When a claim is submitted CareOffice will automatically update the **DATE BILLED** and **LOT NUMBER** or submission number. The **LOT NUMBER** is a 7-digit number, the first number is the last digit of the year, the next number is a Julian date, and the last 3 digits are incremented sequentially. Most offices will submit their claims once a week but larger clinics typically submit their claims once a week. When the claim has been submitted the **STATUS** will change from **Not Submitted** to **Not Reconciled**.

When the user requests an automatic reconciliation from the government, the government will transfer a file called **The Statement of Accounts** which CareOffice will use to automatically reconcile all the claims. The system will find the claim that has been reconciled and insert the date in the **DATE PAID** field.

CareOffice will also insert the applicable **TRANSACTION CODE** upon reconciliation. The most commonly encountered transaction codes are: 1 = fully paid, 15 = fully paid but under investigation and 4 = will not be paid. An **EXPLANATION CODE** will be filled in if the claim was not fully paid. The user should consult the tables available from the government for further information on the transaction and explanation codes used.
The system will also input the **TOTAL PAID** amount upon reconciliation.

CareOffice provides an audit trail such that when a claim has been resubmitted the **TRAIL BACK** area will automatically be filled in with the claim number of the previous claim. The system will also fill in the **TRAIL FWD** area of the previous claim with the claim number of the resubmitted claim.

In the **BILLED BY** field, CareOffice will insert the username received when the software was launched.

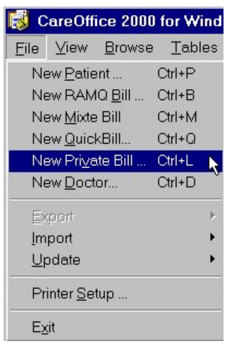
Private Billing

The Private Billing screen may be accessed in from several different locations within the software.

Choose **New Private Bill** from the **File** menu on the desktop.

Right-click on the patient's name from the Patient Browser on the desktop and choose **New Private Bill.**

Click on **$Private** from the Patient Demographics screen.



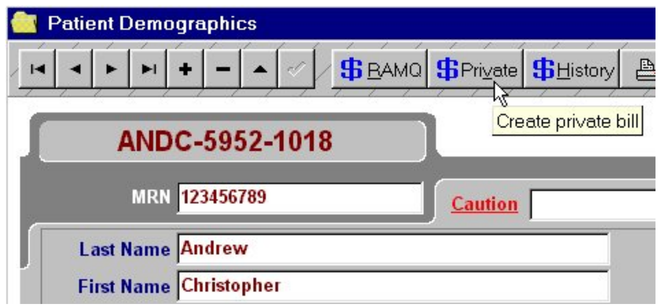


Figure 156 — Creating Private Bill from Patient Demographics

Figure 157 — Accessing New Private Bill from CareOffice desktop

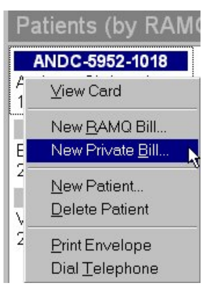


Figure 158 — Right Click on Patient in Patient Browser

If you choose to create a private bill from the Patient Demographics window then all the relative information will be transferred from the patient's record onto the private bill.

If you choose to create a **New Private Bill** from the desktop, you must input the patient's RAMQ number and if this patient is in the database all the relevant fields will be input automatically onto the bill.

If the patient is not in the database you will not be able to create a new private bill from the File menu until you have first created a new patient card for the patient. You can then click on the **$Private** button in the Patient Demographics window to create a private bill for that client.

Components and Features of the Private Billing Window

The New Private Bill resembles the following illustration.

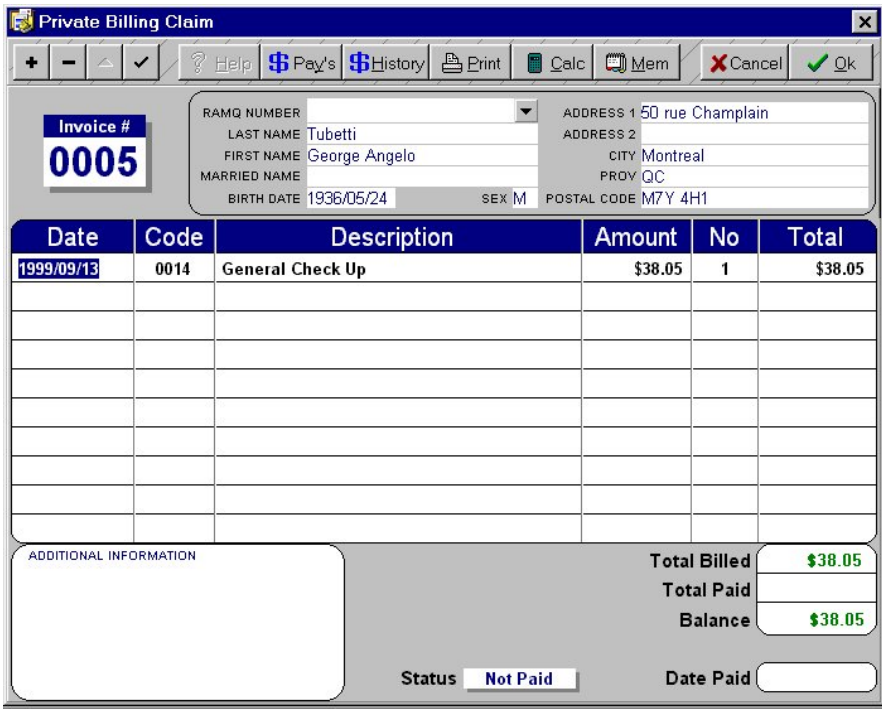
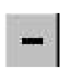


Figure 159 — New Private Bill

The following explains the various different features of the private bill.

Insert Record – If you click on this button after editing a new private bill it will be assumed that you want to save your changes and a new record will be inserted.



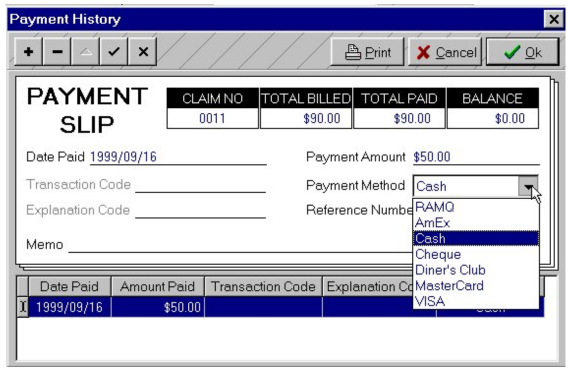
Delete Record – Clicking on this button will cause the record currently on the screen to be deleted from the patient database. You will not be asked to confirm that you want to delete the current record on screen if you press this button.

Edit Record – Clicking on this button will allow you to edit the record displayed.

Post Edit saves the changes made in **Edit** mode to the current record. At this point you can proceed to make other changes but the data is not actually written to disk until you click on the form's OK button. This allows you to batch a number of transactions together and commit them to disk all at the same time.

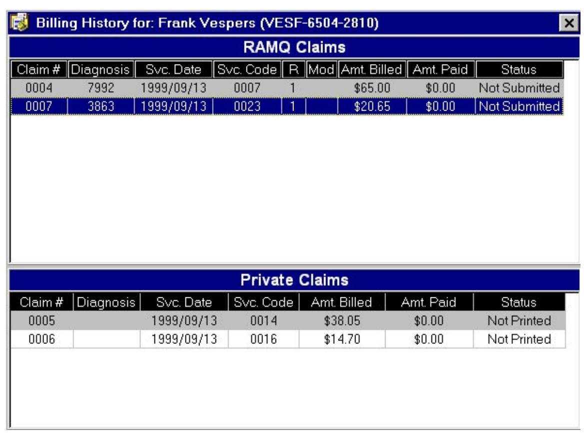
? Help will provide you with assistance in bill creation in a later version of CareOffice. This feature has not yet been implemented.

$Pay will allow the user to change the status of a bill from Not Paid to Paid. When a bill has been created and the $Pay's button is clicked the following window will appear allowing the user to input the details of the payment.



CareOffice will automatically insert today's date into the Date Paid field. The user can input the Payment Amount by simply clicking on the field next to it. The system also allows for several methods of payment. The Reference Number field could be used to track the authorisation number received from the creditor or perhaps the cheque number. At the bottom of the Payment History window the system displays the most pertinent details of all the transactions associated with this particular claim number.

$ History when clicked will automatically display the billing history for the patient whose name is currently displayed. This is an important feature because it can be used to look up diagnosis and billing codes used in the past and may be a time saver for the creation of a bill pertaining to continued treatment of a particular condition. This feature may also be used to quickly determine for example when the date of the last general check-up was performed.



The Billing History for a particular client will show all relevant RAMQ and Private claims.

Print will print a copy of the bill. Once the Private bill has been printed you will notice that the Status at the bottom of the bill will change from Not Printed to Printed.

Calc will access and display the Windows Calculator accessory.

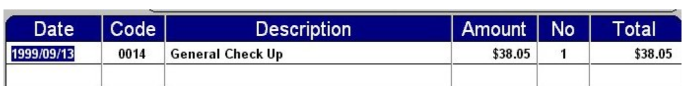
Mem will memorise and allow you to apply a name to the type of bill just created. This is also a time saver for creating bills for standard office visits or other types or services a physician frequently performs. When more than one claim type has been memorised you can click on the **Mem** button to see a scrolling list of the claim types available and then highlight the claim. The memorised claim will automatically be inserted onscreen with the current date. It can then be edited in the normal fashion.

Clicking on the **OK** button will save to disk all the changes you've made while in the **Private Billing** screen and exit.

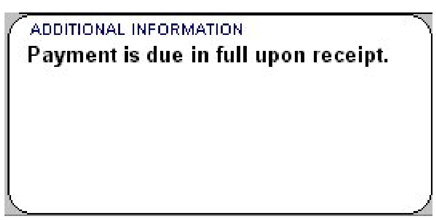
Clicking on **Cancel** will exit the **Private Billing** screen without saving any changes made. You will be warned that changes have been made and if you exit these changes will be lost.

Information from the Patient Demographics will be automatically inserted into the header of the claim. If while in the Private Billing Claim window the user needs to create a private claim for another patient, select another patient's RAMQ Number by clicking on the down arrow to the right of that field and select the patient's RAMQ number.

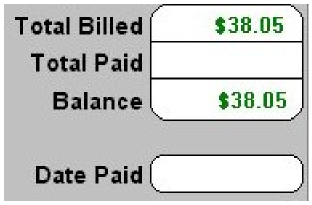
The Invoice # is applied to the Claim automatically by CareOffice when the user clicks on either the Post Edit button or the OK button. The Invoice # cannot be changed.



The details of the claim are inserted in the much the same manner as for the RAMQ bills. When the user clicks in a space in the Date column today's date is automatically inserted. This date can be changed by highlighting the date and replacing it's contents. In the Code column the user has the option of manually inserted the appropriate Billing Code or double clicking in the column under Code to activate the Service Code Browser. The user can then find the appropriate code and double click on it to return to the Private Billing Claim. The Code, Description and Amount will automatically be inserted into the claim. The number of units, which is found in the No column defaults to 1. This can be changed if necessary. CareOffice's extensive error checking will ensure that units are not applied to services inappropriately.



The Additional Information box can be used at the user's discretion. It is a fully editable text field.



The values of the Total Billed, Total Paid, Balance and Date Paid fields are automatically calculated by CareOffice. Partial payments are acceptable. The claim is updated when the user clicks on the $Pay button and records a payment. The Date Paid will be the date shown on the Payment slip. To see which claims have been paid in full use the Private Billing Browser which will show a difference in the Amount Billed and the Amount Paid as shown below.

When a claim is first created the status field will be empty until the **OK** or **Post Edit** button is clicked. It will then change to **Not Paid** until a payment is applied against the claim. The status will change to **Paid** after a payment has been received and recorded.

Keyboard Shortcuts

The following are the keyboard shortcuts available while in the edit mode of either the RAMQ or the Private billing screens.

F1:	Go to the RAMQ number field
F2:	Go to the attending doctor field
F3:	Go to the diagnosis field
F4:	Go to the establishment code field
F5:	Go to the additional info field
F8:	Go to the CS field
F9:	Set the CS field to 'S'
F10:	Save changes
Up Arrow:	Move to the previous field
Down Arrow:	Move to the next field
PgUp:	Move to the previous section
PgDn:	Move to the next section
+:	Increment date by one day (on date fields only)
-:	Decrement date by one day (on date fields only)

Browsing the Bills

The Billing Browser provides the user with the means to view the various types of bills created and also to access them for updates such as bill payments. The Billing Browser is accessed from the CareOffice desktop. Simply clicking on the Billing Browser will gain access to the various views available.

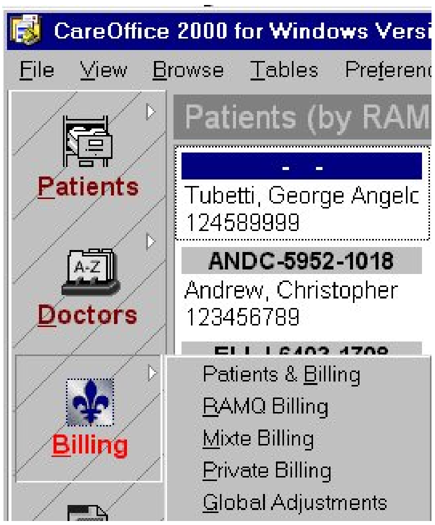


Figure 160 — The Billing Browsers

Patients & Billing

The Patients & Billing browser allows the user to view all the patients in the data base along with the government and private claims associated with the selected patient. The patient information that is selected or highlighted will be the one for which the claim information is displayed.

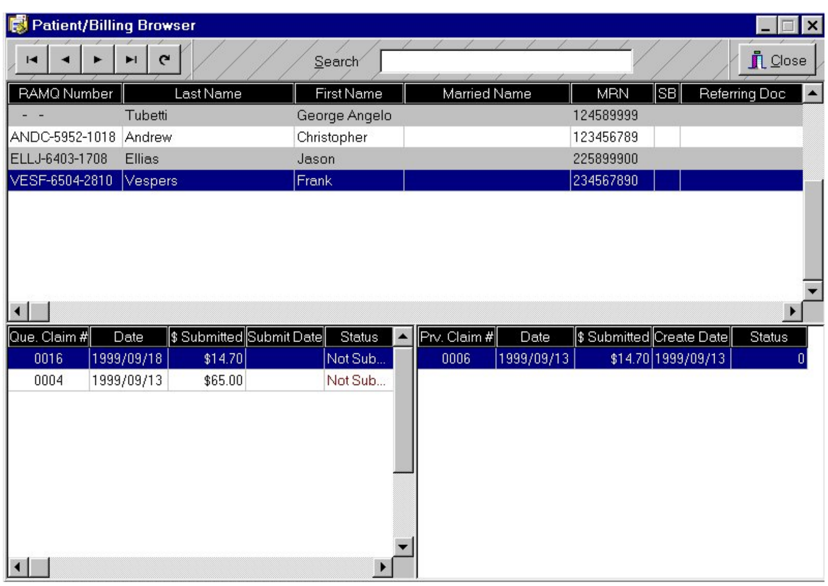
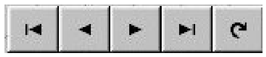


Figure 161 — Patient/Billing Browser

Most of the fields in the above illustration are self-explanatory but it is useful to not that the status of the private claims may be 0 if the claim has not been paid or 1 if there has been a payment on that claim.

Moving Through the Patient/Billing Browser

At the top of the Patient/Billing Browser are directional arrows which can be used to move through the records of the browser.



From left to right these symbols represent first record, prior record, next record and last record. The last symbol on the right when depressed will refresh the data. This is particularly useful in a networked environment where several users may be simultaneously working on the same database.

The user may also use the up and down arrows on the keyboard, or the scroll bars to the right of the patient and billing informaiton to move the selection up and down.

At the top of the screen is a **Search** option which will start searching through the patient’s last name to find a match as soon as you start typing. Typing “T” for example will bring the user to the first patient record whose name begins with T. If you type more of the patients name the search will be narrowed further. The user can continue typing the letters of the patient’s name until an exact match is found.

Moving from the Patient/Billing Browser to other screens

Double-clicking on any of the rows of the patient information at the top of the **Patient/Billing Browser** will bring you directly to the Patient Demographics window, illustrating the relevant patient’s information. Here you can make any necessary changes and when you click on the OK button you will be automatically returned to the Patient/Billing Browser.

Similarly double-clicking on the patient’s RAMQ or Private claim information will bring up the corresponding billing screen.   The user can then make changes or record payments as required. As above, when the user clicks on the OK button the billing window will close and the user will be brought back to the Patient/Billing Browser.

RAMQ Billing Browser

Choosing the RAMQ option from the Billing Browser will bring up a window similar to the following.

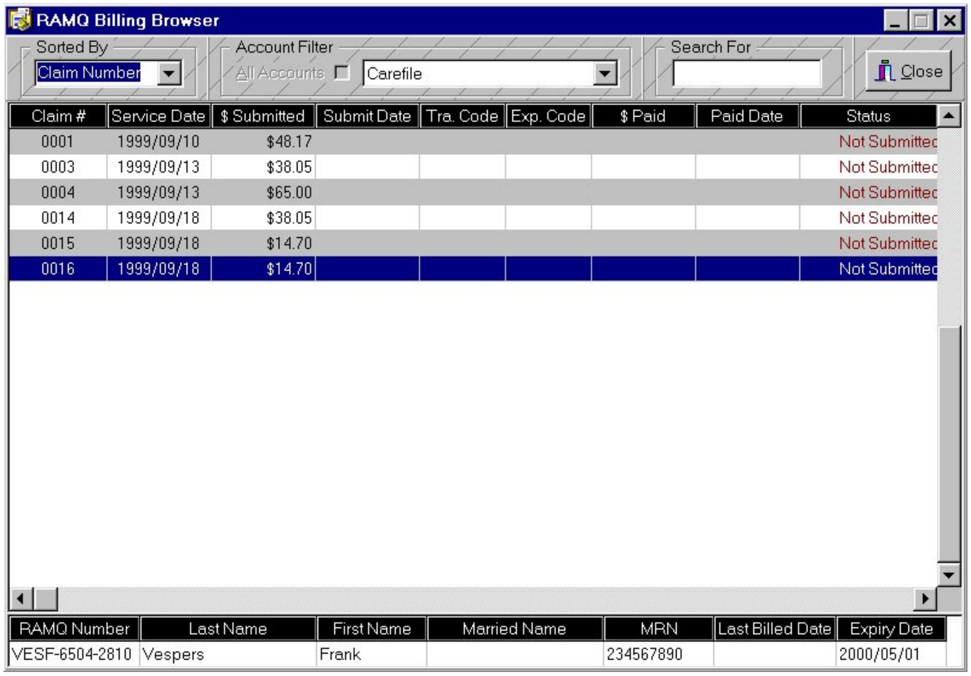


Figure 162 — RAMQ Billing Browser

N.B. The patient information displayed at the bottom of the screen relates to the selected or highlighted claim in the top portion of the billing browser.

If you double-click on any of the rows of the browser, CareOffice will open the RAMQ Billing window to allow the user to view more of the information onscreen or to make any necessary changes.

Sorted By

This option will allow the user to sort all the RAMQ bills in the database by the Claim Number, Service Date or Bill Status. The Bill Status may be either Not Submitted or Submitted.

Account Filter

By clicking on the arrow to the right of the scrolling field the user can filter out all claims pertaining to accounts other than the one selected. This feature is especially useful in larger clinics where physicians or groups of physicians are separately billing the government.

Search For

What the user can use the Search For field is dependant on how the RAMQ bills have been sorted. For example, if the database has been sorted by Claim

Number the user can type in a claim number in the Search For field and CareOffice will automatically locate that claim and highlight it.

Private Billing Browser

Choosing the Private Billing option from the Billing Browser will bring up a window similar to the following.

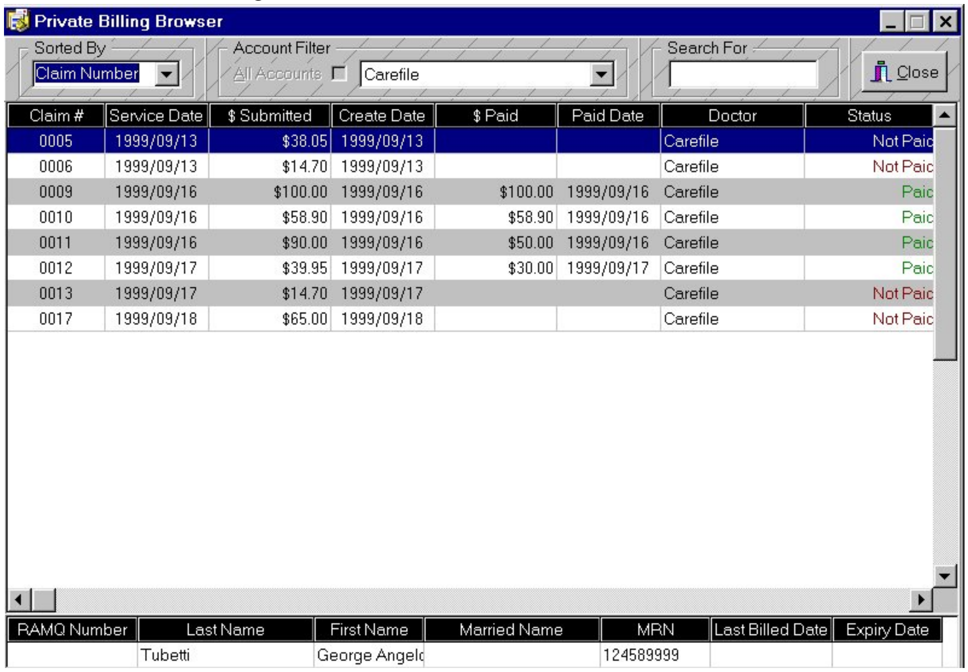


Figure 163 — Private Billing Browser

N.B. The patient information displayed at the bottom of the screen relates to the selected or highlighted claim in the top portion of the billing browser.

If you double-click on any of the rows of the browser, CareOffice will open the Private Billing window to allow the user to view more of the information onscreen or to make any necessary changes.

Sorted By

This option will allow the user to sort all the Private bills in the database by the Claim Number, Service Date or Bill Status. The Bill Status may be either Not Paid or Paid.

Account Filter

By clicking on the arrow to the right of the scrolling field the user can filter out all claims pertaining to accounts other than the one selected. This feature is especially useful in larger clinics where physicians or groups of physicians are separately billing the government.

Search For

What the user can use the Search For field is dependant on how the Private bills have been sorted. For example, if the database has been sorted by Claim

Number the user can type in a claim number in the Search For field and CareOffice will automatically locate that claim and highlight it.

Global Adjustments

From the Billing Browser icon on the CareOffice desktop the user also has access to an accounting feature, Global Adjustments that allows the user to account for negative transactions by the government such as deductions in payment due to a physician exceeding the earnings ceiling for that year or subscription or federation fees which are automatically deducted by the government.

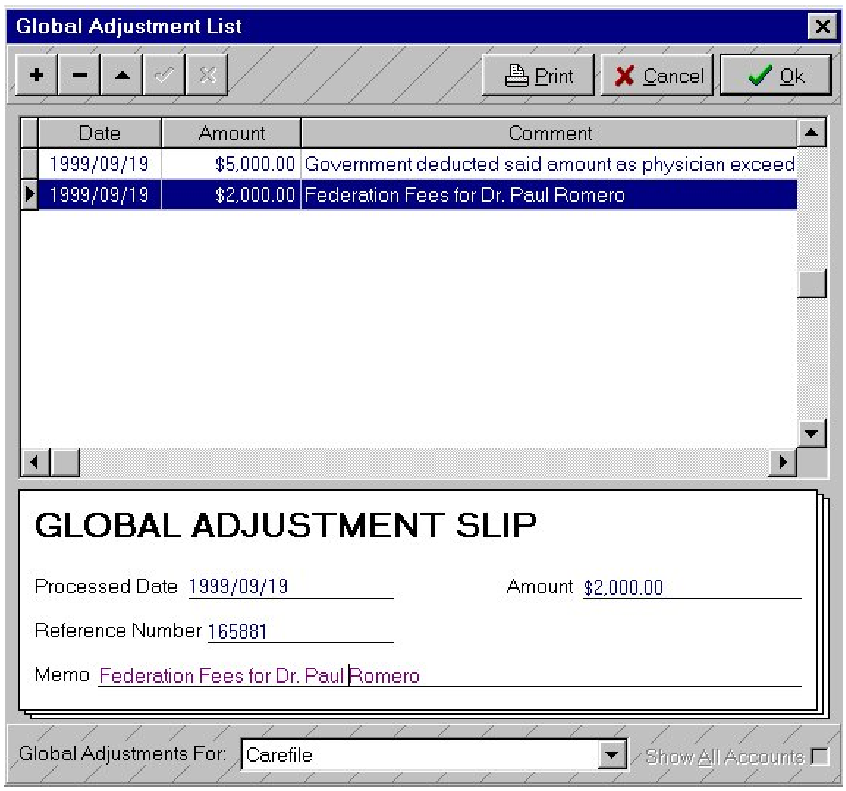
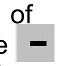


Figure 164 — Global Adjustment List and Slip

To make a new global adjustment click on the  at the top left of the window and fill in the information in the **Global Adjustment Slip** at the bottom of the screen. If it becomes necessary to delete a global adjustment, click on the  symbol. You can review previous adjusments made on a particular billing account by clicking on the You can make global adjustments which will apply to any of the previously set-up billing accounts at your site. To change the Billing account click on the  next to the scrolling field of **Global Adjustments For**.

Mixte Billing

Mixte billing is used for “Rémuneration Mixte”. This is for per diem and hourly claims to the government. The Mixte Billing is accessed from the Billing Module in the manner illustrated in the figure below.

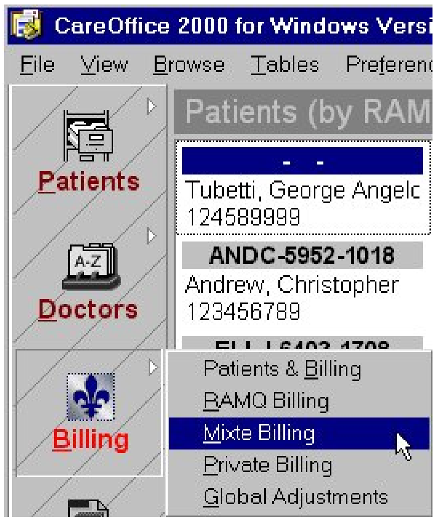


Figure 165 — Mixte Billing

Chapter 5

Schedules

Schedules Module Overview

The **Schedules** module is an **Appointment Scheduler** used to schedule time for staff and facilities at your location. It can be used to schedule appointments for Doctors, Nurses or other health care workers and it will also allow you to book meeting, surgical and examination rooms. CareOffice allows you to have an unlimited number of schedules with password protection so only authorised users may access secure scheduling information.

This chapter will cover the creation of new schedules for staff and facilities; booking, viewing, searching and cancelling appointments.

Accessing the Scheduler

Click on the Schedules icon on the CareOffice main desktop to access the **Appointment Books**.

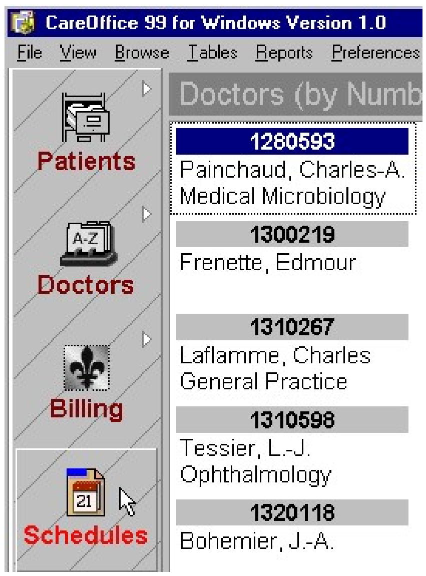


Figure 166 — Selecting Schedules from desktop

The illustration below shows what the **Appointment Book** window looks like and labels some of the important options we will be covering.

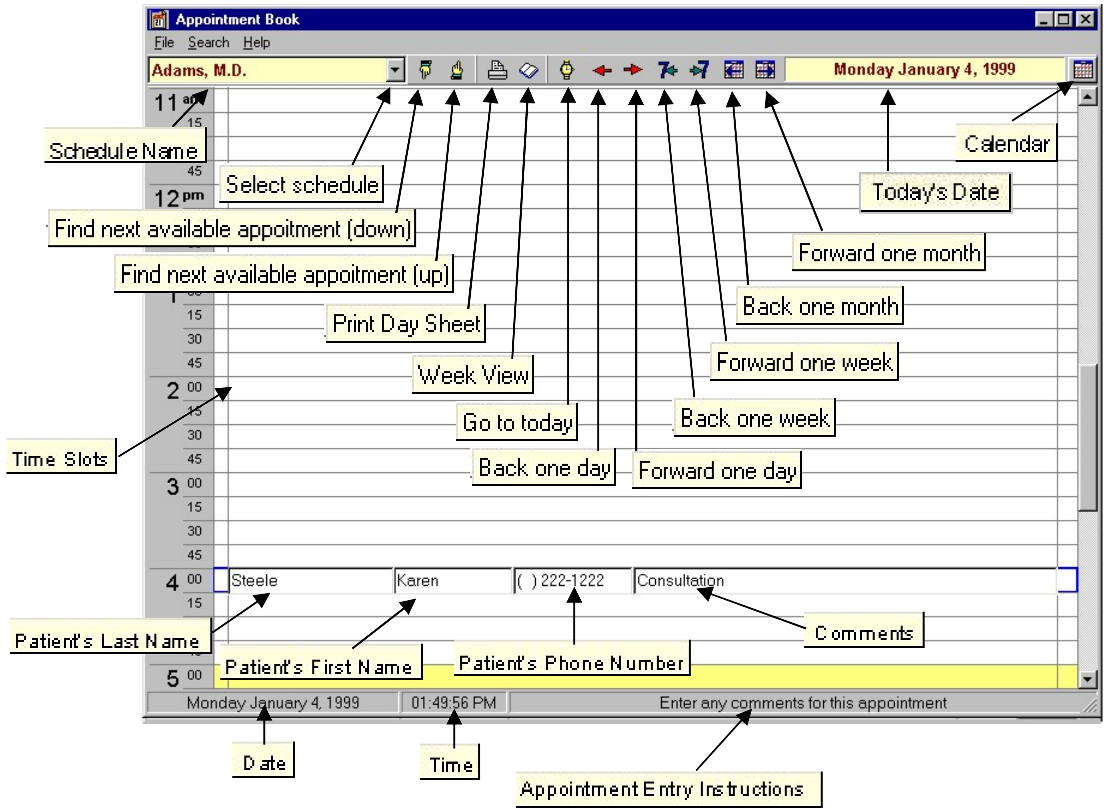
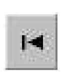


Figure 167 — Appointment Book

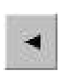
The Schedule Information Screen

The **Schedule Information** screen uses the same buttons for moving through the schedule records and editing them as **Patient Demographics and Doctor Information** do. The following is a recap of the use of these buttons .

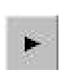
If you simply position your mouse pointer over any of the buttons a little yellow box with a word or two of text will tell you what the button is used for. The following briefly defines these buttons and their uses:



First Record – Pressing this button will show you information about the first schedule entered.

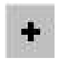


Prior Record – Pressing this button will show you information about the previous schedule.



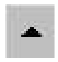
Next Record – Pressing this button will show you the next record in the Schedules database.

Last Record – Pressing this button will show you the Last Record in the Schedules database.



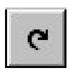
Insert Record – If you click on this button while editing a new or existing schedule it will be assumed that you want to save your changes and a new record will be inserted

Delete Record – Clicking on this button will cause the schedule currently on screen to be deleted. You will be asked to confirm that you want to delete the current schedule if you press this button.



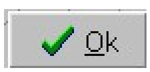
Edit Record – Clicking on this button will allow you to edit the record displayed.

Post Edit saves the changes made in Edit mode to the current record. At this point you can proceed to make other changes but the data is not actually written to disk until you click on the form's OK button. This allows you to batch a number of transactions together and commit them to disk all at the same time.



Refresh Data will update the screen of appointments. This is especially useful for networks where many users are entering appointments at the same time. The refresh button will display any new appointments entered by another user.

N.B. Pressing Alt and the underlined letter seen on the button can alternatively access the following options



Clicking on the **OK** button will save to disk all the changes you've made while in the **Schedules** screen and exit.

Clicking on **Cancel** will exit the **Schedules** screen without saving any changes made.

Creating New Schedules

Within the Appointment Book you can have several different schedules. You may want to set up a separate schedule for each of the Doctors, Nurses and Meeting Rooms in your facility. The following procedure outlines the steps required to create a new schedule.

1. With the **Appointment Book** window open, click on the **File** menu and select **Schedule Info** as in the following figure.

Figure 168 — File, Schedule Info

A window similar to the following will appear:

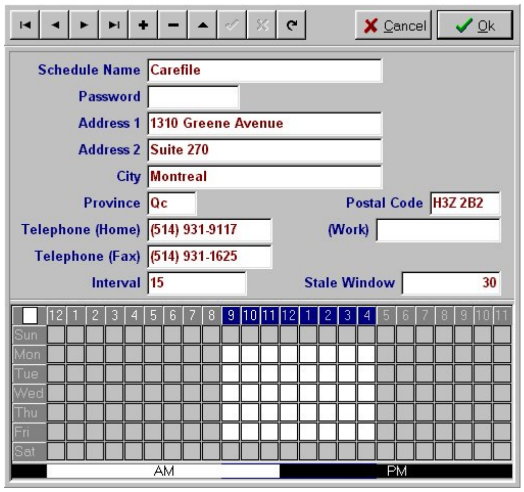


Figure 169 — Schedule Information

2. Click on the  at the top of the screen to insert a new record.
3. Click in the text entry box next to **Schedule Name**.
4. Type the name of the schedule, which may be the Doctor or Nurse's name or perhaps the number/name of the examination or meeting room.
5. Press **Tab** to move to the next field. The **Password** field is where you will enter the password for this particular schedule. Once a schedule has been given a password it is secure from anyone who doesn't know the correct password. Please note that the password is case sensitive
6. Continue to press the **Tab** key and enter the data into the remaining fields.

   N.B. You can also press Shift-Tab to go to the previous field or use your mouse and click in any of the fields to edit them

All of the text fields in the Schedule Information window are self-explanatory with the exception of **Interval** and **Stale Window**.

Interval refers to the length of the appointments. In the above example Interval is set to 15 which will set the length of each time slot on the appointment calendar to 15 minutes.

Stale Window refers to the number of days old appointments should be kept on line before they are deleted in an automated clean-up procedure.

7. The matrix at the bottom of the Schedule Information window illustrates the working hours to be applied to this particular schedule. When creating a new schedule a standard 9 to 5, Monday to Friday workweek is applied. The hours available for appointments are highlighted in white. Simply click on any of the boxes within this matrix to activate a time slot if it was not previously activated or to deactivate a time slot if it was previously activated. You can also click on any of the numbers in the top row of the matrix to activate or deactivate that time slot for the entire week.
8. You may click on the check mark to post the edit and continue making changes to other schedules in place or insert or delete schedules. When you've completed the changes, click on the **OK** button at the top right hand side of the **Screen Information** window to save the new schedule. If you click on the **Cancel** button none of the changes you've made will be saved.

Selecting a Schedule

1. With the Appointment Book open on screen, click on the down arrow next to the name of the schedule currently open.

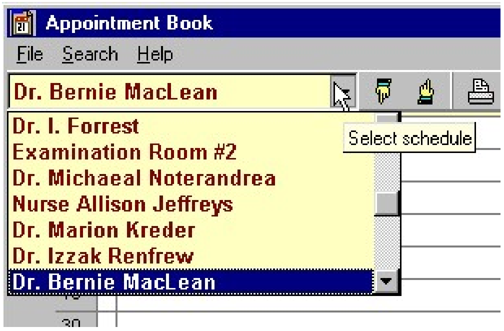


Figure 170 — Select a schedule

2. As in the picture above a list of schedules will appear. Highlight the one you want to use to select it. The following dialogue box will appear.

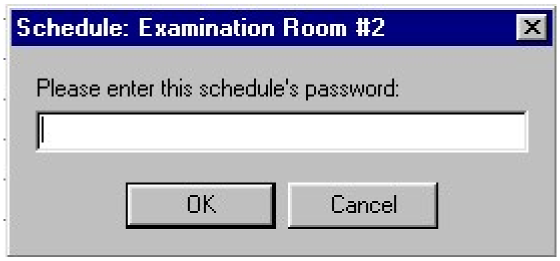


Figure 171 — Enter the schedule's password

3. Type in the password associated with the selected schedule and press the **OK** button.

   If the Schedule selected was chosen by mistake, click on the **Cancel** button and select the appropriate schedule as in Step 2.

Moving around the Appointment Book

The Schedule Module of CareOffice allows for movement throughout the schedules quite flexibly. The illustration below shows the buttons you will use to move from one time frame to another.

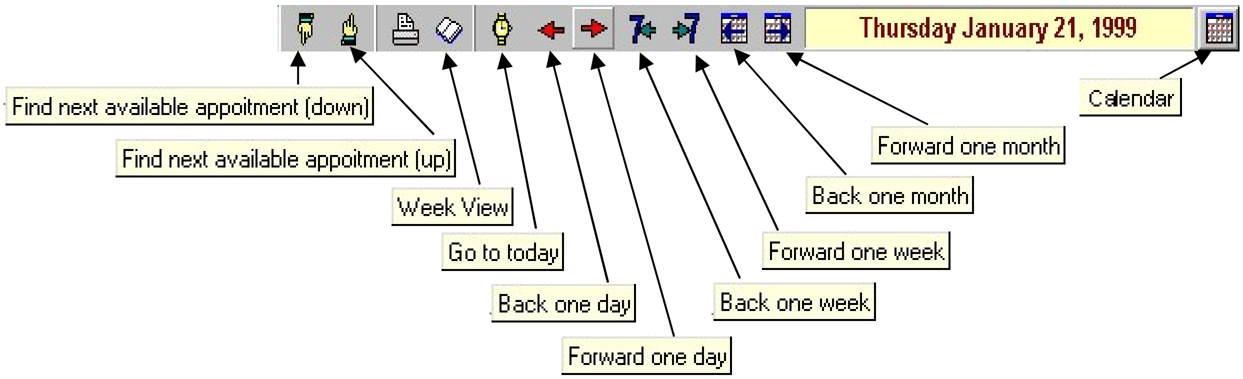


Figure 172 — Moving through the Schedules

Find next available appointment (down)

If you click on this button the next available appointment will be selected. For example: if you are viewing the schedule for next Tuesday it will select the next available appointment on or after next Tuesday.

Find next available appointment (up)

If you click on this button the available appointment previous to the one selected will be highlighted. If no appointments are selected it will find an available appointment prior to the time slots displayed.

Week View

If you click on this button you will see the entire schedule for one full week.

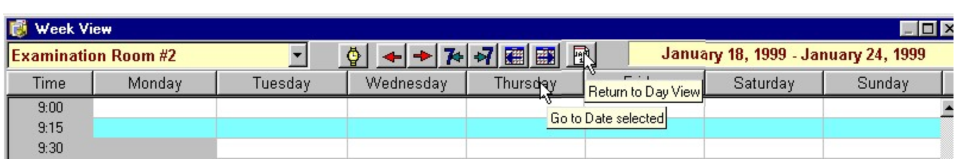


Figure 173 — Return to Day View Option

You will notice that there are several buttons here that are seen in the Day View and they have exactly the same function. The **Return to Day View** option is the only new one.

To go back to seeing the schedule one-day at a time, you can click on the **Return to Day View**. If you would like to see the appointments of a specific day, click on the name of the day or on any of the time slots within the column for that day.

While viewing the appointment book one week at a time you may want to resize the width of the day columns. This will allow you to see more details about any of the appointments. You can resize the columns by positioning your cursor on the line separating one day from another. You will notice that your cursor will change to appear as in the illustration below.

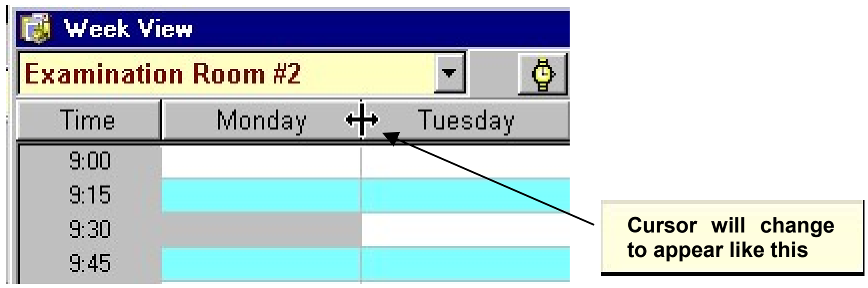


Figure 174 — Adjusting the column size

Once you have a cursor which looks like the above, hold down the mouse button as you drag the mouse right or left to make the column larger or smaller.

Go to today

No matter where you are in the Appointment Book if you click on this button it will always bring you to today's date in Day View mode.

Back one day

Clicking on this button will display the appointments one-day previous to the day presently shown.

Forward one day

When you click on this button the next day will be displayed.

Back one week

Clicking on this button will display the day's appointments one week previous to the day presently shown.

Forward one week

When you click on this button the appointments for the day one week ahead will be displayed.

Back one month

Clicking on this button will display the day's appointments one month previous to the day presently shown.

Forward one month

When you click on this button the appointments for the day one month ahead will be displayed.

Calendar

If you click on this button you will see a monthly calendar as shown below.

Notice that January 1, which is a holiday has been highlighted to indicate that this is a holiday. All of the Canadian statutory holidays are marked as such. You will also note that the date currently being viewing on the Day View mode is also selected. If you move the cursor over the holiday, a little hint window will pop-up with that holiday's name.

Booking Appointments

There are three methods to book an appointment within the Appointment Scheduler. You can type in the patients name and phone number manually, you can have CareOffice search for the patient and then type in the information manually or you can drag and drop the patient's information from the Patient Module.

To enter an appointment you must first of all have the Appointment Book open and the appropriate schedule selected.

Click on an available appointment time slot or choose from the Search Menu, Find Next Available Slot as in the following illustration

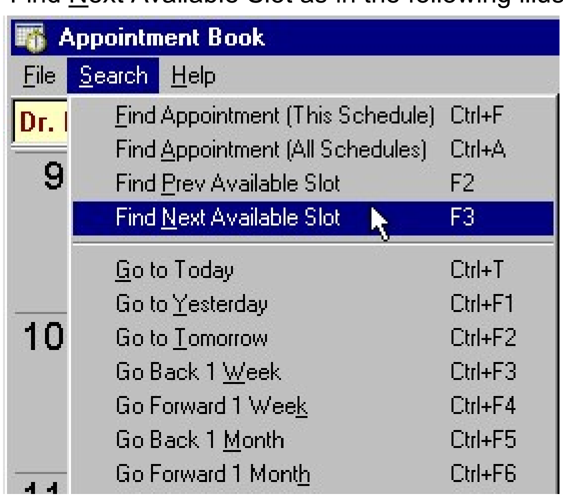


Figure 175 — Search, Find Next Available Slot

When the appointment time has been selected you will notice a blue box around that entire time slot. As soon as you start typing, boxes, which define the fields you have to enter, will be visible and at bottom of the screen a prompt is given to you to enter the patient's last name as in the following illustration.

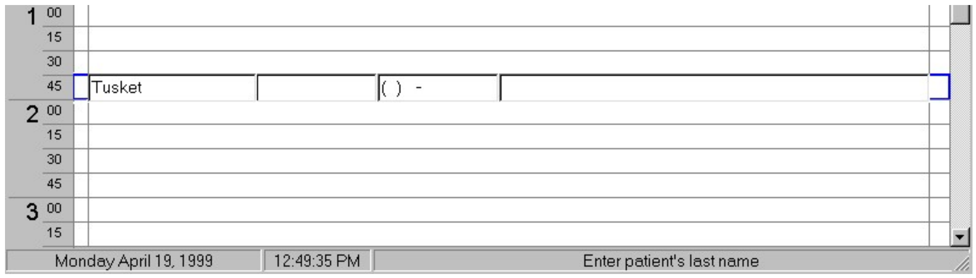


Figure 176 — Time slot has been selected

Manual Entry of Appointment

With the time slot for the appointment selected

1. Enter the patient's last name
2. Press the **Tab** key and enter the patients first name
3. Press the Tab key and enter the telephone number
   If you need to enter the area code, click in the area between the ( ) and enter the number
4. Press the Tab key and enter any comments you wish to add, i.e. reason for visit.
5. Press the Insert key.

Automated Appointment Entry

There are three methods to automatically enter the patient information into an appointment: Search for Patient or Drag Patient Information from either the CareOffice desktop or from Microsoft Outlook.

Search for Patient

With the appointment time slot selected

1. Type the first few letters of the patient's last name
2. Double left click on the box containing the Patient's Last Name
3. A window similar to the following will appear

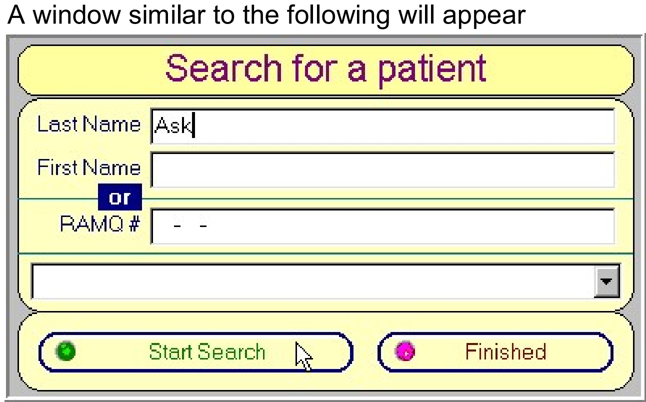


Figure 177 — Search for a patient

If information from the last search is contained on this window highlight the information in the first name text box and press delete then highlight the information in the last name text box and type in the name of the patient you wish to search for.

4. Click on the **Start Seach** button.
5. If more than one patient has a name beginning with these letters, click on the down arrow to see the names found.

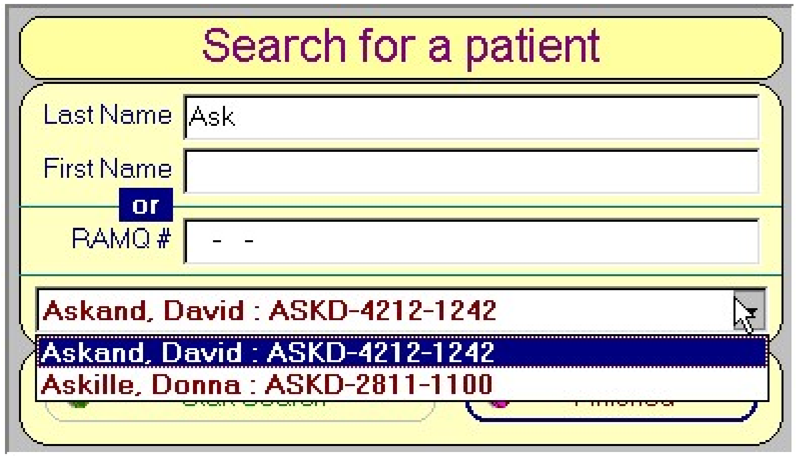
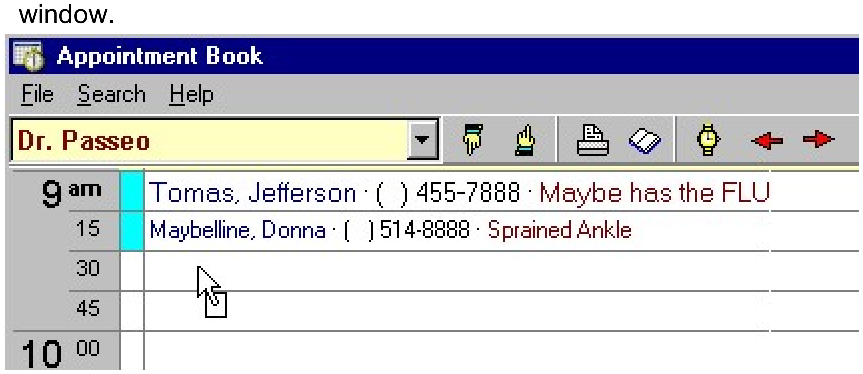


Figure 178 — Select patient from list of patients found

6. Click on the Patient's name you wish to select.
   You will notice that the patient's first and last name, along with their home phone number has been inserted into the appointment time slot.
7. Press on the Insert key to accept this appointment.

Drag Patient Information from Desktop

1. Go to the day you wish to book the new appointment for.
2. Move the Appointment Book window over to the right so you can see the main CareOffice desktop.
   a) Position the cursor over the title bar of the Appointment window.
   b) Hold down the left mouse button and drag the window to the right.
3. Select the Patient view you wish to see.
4. On the CareOffice desktop, find the patient by clicking on the alphabetic tabs at the bottom of the screen or by scrolling through the patient database.
5. Click on the Patient Information Box and drag the mouse on top of the Appointment Book. The Appointment Book will now become the active window.



Notice that the cursor now has a little box attached to it, indicating that some information is available to be copied to this time slot.

With the left mouse button still depressed move the arrow onto an available time slot and then release the mouse button. The patient's information will be copied onto that time slot.

5. Press the insert key to accept the appointment information.
   Notice that the block next to the appointment time slot changes to a light blue colour which shows at a glance by highlighting which time slots for that day are already booked.

Drag Patient Information from Microsoft Outlook

1. Go to the day in the Appointment Book you wish to book the new appointment for.
2. Click on the Start Button of the Windows Task Bar and start Microsoft Outlook.
3. Select Contacts from Microsoft Outlook as in the following figure

Figure 179 — Microsoft Outlook, Contacts

4. Move the Microsoft Outlook, Contacts window to the left so you can see the CareOffice Appointment Book underneath and to the right of the window.
5. Select and drag the contact in Microsoft Outlook you want to book an appointment for:
   a) Position the cursor over the Contact Title Bar of the Contact window.
   b) Click and Hold down the right mouse button and drag the mouse to the right onto the CareOffice Appointment Book. The Appointment Book will become the active window

   Notice that the cursor now has a little box attached to it and a + sign, indicating that some information is available to be copied to this time slot.

   With the right mouse button still depressed move the arrow onto an available time slot and then release the mouse button. The patient's information will be copied onto that time slot.
6. Press the insert key to accept the appointment information.
   Notice that the block next to the appointment time slot changes to a light blue colour which shows at a glance by highlighting which time slots for that day are already booked.

If there isn't enough room to display both the Microsoft Outlook window and the Appointment window on the screen you can initiate the click-and-drag as described above and then drag the card to the CareOffice icon on the taskbar at the bottom of the screen. Hold the mouse there for a second or two and the CareOffice window will be automatically brought to the forefront. You can then complete the drag by dropping the contact on the appropriate slot.

Searching Appointments

CareOffice allows you to search through a particular schedule or through all the schedules in the Appointment Book for all the appointments booked by a specific patient.

To search for these appointments, you must first have the Appointment Book opened.

1. On the Menu Bar, click on **Search** and select **Find Appointment (This Schedule)**. The following window will appear

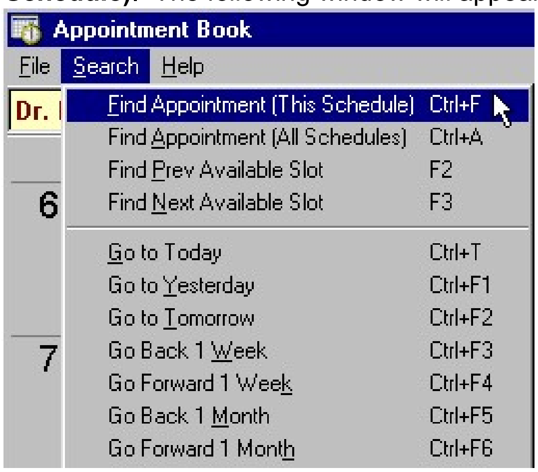


Figure 180 — Find Appointment (This Schedule)

2. Type in the last name of patient you wish to search for.
3. Click on the Start Search button.

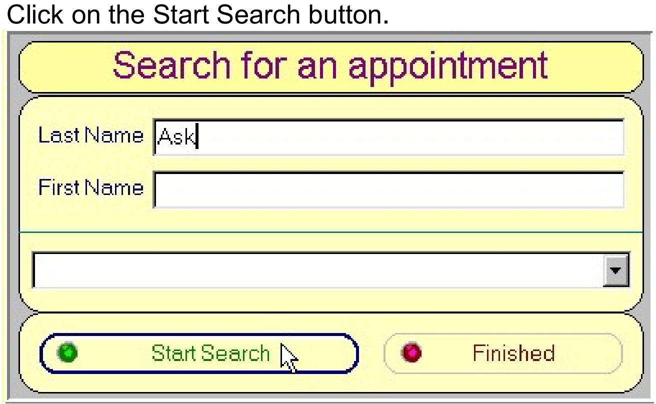


Figure 181 — Search for an appointment

4. To find a specific appointment when more than one appointment was found, click on the down arrow as illustrated in the following figure.

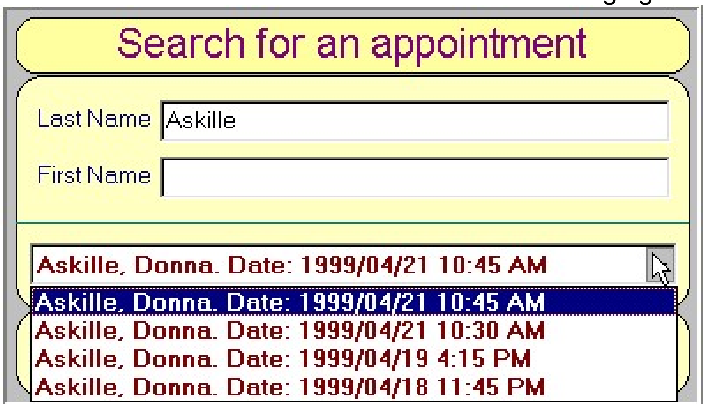
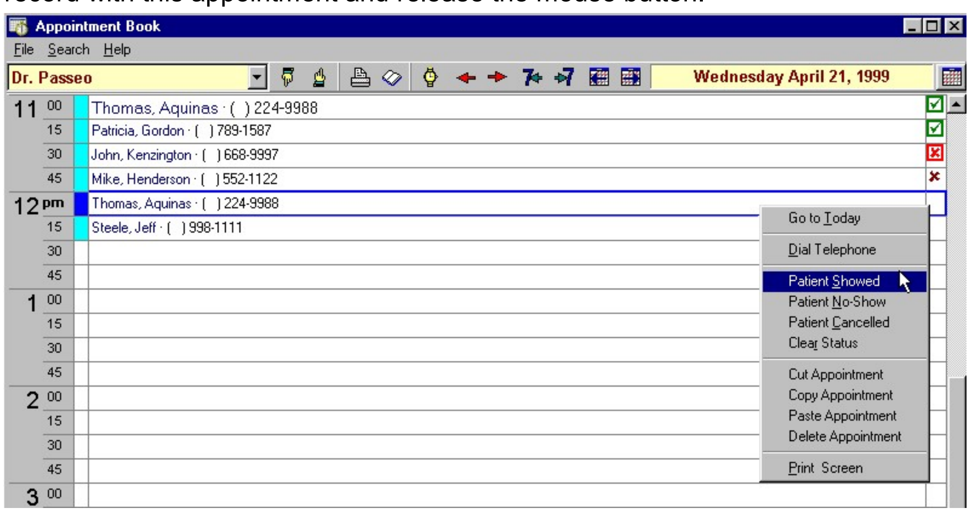


Figure 182 — Selecting a particular appointment

5. To go to a particular appointment slot found click on it and you will be automatically brought to the appropriate schedule, day and the time slot in question will be highlighted.

Changing the Status of an Appointment

To the right of the patient appointment information is a box that is used to indicate the status of a particular appointment. You may want to change the status of an appointment. To do this simply right click anywhere on the appointment information whose status is to be changed and select the status you wish to record with this appointment and release the mouse button.



 Indicates Patient Showed

 Indicates Patient No-Show

 Indicates Patient Canceled

You can also clear the status of an appointment by selecting Clear Status.

Notice that by right clicking on a particular appointment you can also cut, copy or paste or delete an appointment.

Printing Appointments

You can at any time select to print the appointments for a schedule by selecting File, Print Day Sheet as in the following illustration.

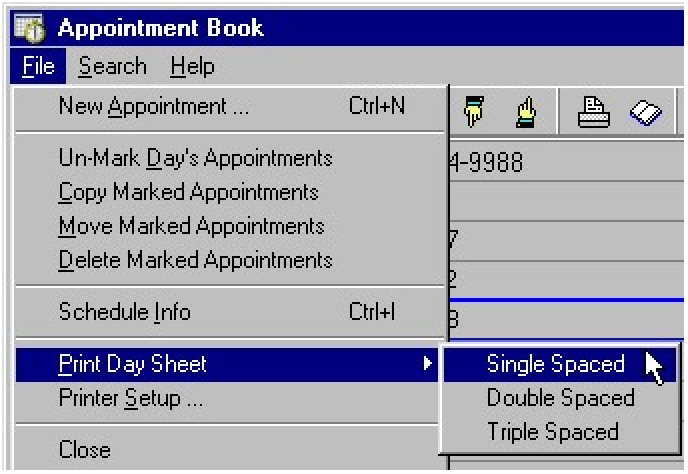


Figure 183 — Print Day Sheet

You will then see the Print Dialogue where you can select the printer and number of copies.

Working with Marked Appointments

CareOffice will allow you to highlight or mark all the appointments on a specific day and then copy or move them to another day. If you copy the marked appointments you will still retain the original appointments and then a copy of the appointments is copied to another day. If you move the marked appointments there will only be one copy of that particular appointment which has been moved to a new time slot.

To mark the appointments click on the **File** menu and select as in the following illustration.

Figure 184 — Mark Day's Appointment

You will notice that the appearance of the day's schedule has changed; the white background has changed to grey. Once the appointments have been marked you can unmark, copy, move or delete them. If you want to unmark or delete the marked appointments you simply click on **File** and select **Un-Mark Day's Appointments**. If you want to Copy or Move the appointments to another day then you must first go to that day and then click on the File menu. Notice the new options available.

Figure 185 — Copy Marked Appointments

Chapter 6

RAMQ

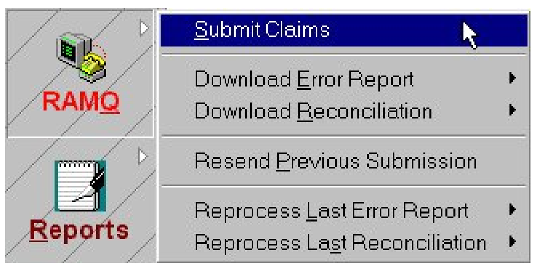
RAMQ Module Overview

This module is the user's interface with the government. When CareOffice was installed at your site, the Carefile representative configured your modem to allow direct access to the host system at the government using CareOffice and the modem connected to your computer. With the RAMQ module the user can submit their claims and download various reports.

This chapter will cover what the RAMQ options are and how they are used.

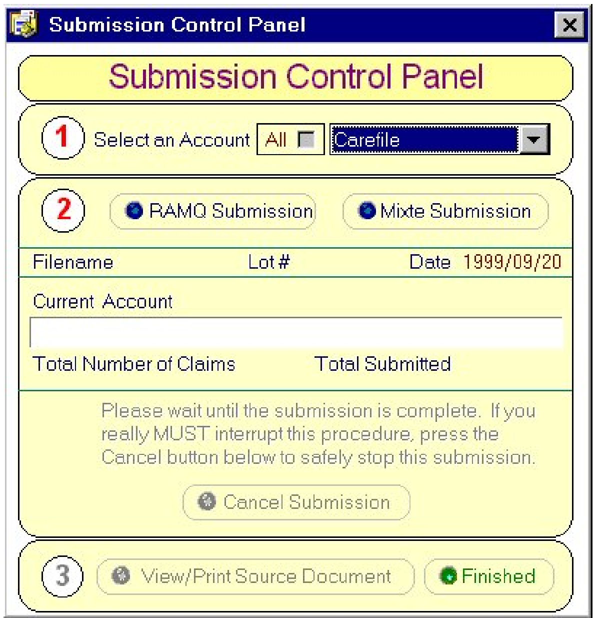
You will notice that within the RAMQ module there are three main options; Submit Claims, Download Error Report and Download Reconciliation. For each of these options CareOffice also allows the user to resubmit or reprocess the claims, reports or reconciliations. These options are made available to the user so that if for some reason the connection between the user's system and the government host system fails while the submission is being uploaded or any of the reports are being downloaded then the user can easily recover by choosing to resend or reprocess the report without creating any problems with their data within CareOffice.

Submit Claims



The user will select Submit Claims at a frequency determined by the amount of claims generated at the clinic or practice. Some practices submit their claims once a week, some clinics submit claims every day, while some other physicians submit their claims only when the deadline to submit them is approaching.

To submit all previously unsubmitted RAMQ claims and claims to be resubmitted, the user will select Submit Claims from the RAMQ module. This will open the Submission Control Panel



From the Submission Control Panel the user must first select and account if more than one account is in user. The second step is to select either RAMQ Submission or Mixte Submission. Finally the user will click on the Finished button at the bottom of the screen.

CareOffice will automatically gather together the claims and using a program called "Blast" it will direct the modem to dial up the host system at the government offices and submit the claims.

Figure 186 — Submission Control Panel

At the time of claim submission, CareOffice will create and print out a Source Document which is a very important file. The physicians and clinics must maintain this file for a minimum of 5 years to provide the government with information they need in case an audit is performed. The Source Document contains every single field of every claim submitted at that time. At the very end of the Source Document there is a statement to the effect that undersigned physician swears that the information on this submission is correct and that the work claimed was performed. There will be a place for the physician to sign his name and to date this document. The practice must keep all such source documents for up to 5 years after the initial submission of the claims.

Download Error Report

The day after the claims have been submitted the user will select Download Error Report from the RAMQ module as in the following illustration.

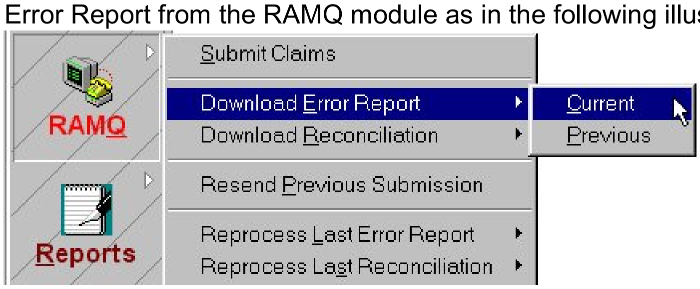


Figure 187 — Download Error Report

This function will automatically dial up the government host system to obtain the error report. The error report contains information such as how many claims were received and of them how many had an incorrect Medicare number. The last digit of the medicare number contains a mathematical modifier to check the validity of the health insurance number but it could happen that the medicare number used is not the one for that particular patient. For example, the government records indicate that this patient is deceased.

CareOffice will name the report, save it to the hard disk in a predetermined data folder and then automatically print a copy of the report. The user can then examine the claims which were unacceptable, make the corrections as required and resubmit these claims without delay. If necessary the user can review these error reports in the future with any text processing application.

The download error report will give the user access to the previous or the current error report as the government currently keeps a copy of 1 or 2 prior error reports on their system.

It is very important that the error report be downloaded as soon as possible after the initial submission of the claims. The government can and does withhold payment if the error report has not been downloaded.

Download Reconciliation

CareOffice uses information in the Statement of Accounts which is produced by the government to automatically update the system to indicate which claims have been paid and which ones were not and for what reason they were not acceptable. The Reconciliation Report is produced automatically by CareOffice to assist the user in determining which claims were not accepted by the government so that any problems can be found and the claim resubmitted. The government provides to the users a scehdule of when the reconciliation reports can be downloaded by each billing account. Generally the users download the Statement of Accounts every 2 weeks.

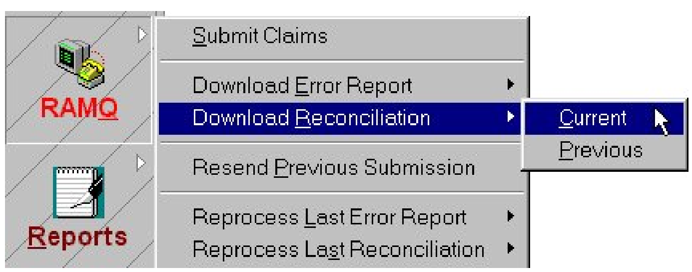


Figure 188 — Downloading the Current Reconciliation

When the user selects Download Reconciliation as in the illustration above, CareOffice will automatically connect to the government host system and download a very large file. When the file has been successfully downloaded a message will appear on the screen indicating that the automatic reconciliation is in progress. It matches all the claims and inserts the transaction codes, the payment value and any related explanation codes into the claim. Two reports are then created and automatically printed; the Statement of Accounts which is the government report and the Carefile report which is called the Reconciliation Report and is a summary of the information contained in the Statement of Accounts. The Statement of Accounts will also display the information about all the claims submitted during the last period whereas the Reconciliation Report displays information relating to only the claims which were erroneous. The user would then use the Reconciliation Report to locate the claims within the Billing Browser and correct those which need to be resubmitted.

If for some reason the reconciliation reports are lost the user may select to download the previous reconciliation report. The government will have available on their system 2 or 3 previous reports.

Chapter 7

Reports

The Reports Module of CareOffice provides the user with alternate ways to look at the data created by the system. Within this module there is also the option to reprint the reports which were previously created by CareOffice or downloaded from the government system.

Billing Reports

The Billing Reports available on CareOffice provide the user with many different ways to view the activities of the practice or clinic which have been recorded within the system.

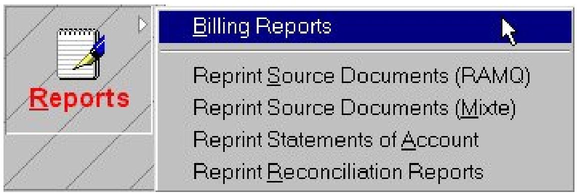


Figure 189 — Billing Reports

When the user selects Billing Reports from the Reports Module, as in the above illustration, the following window will appear allowing the user to customise the report.

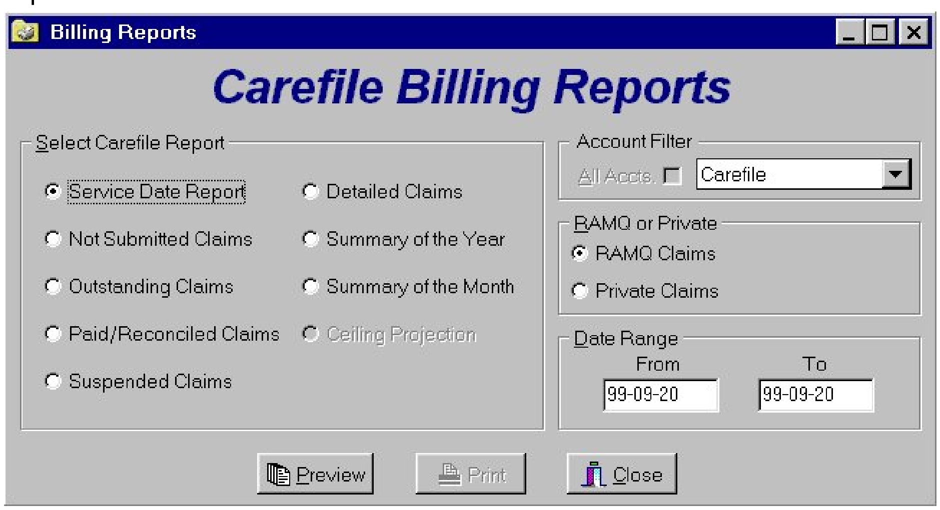


Figure 190 — Carefile Billing Reports

The user can then preview the report onscreen or they may choose to have the report printed.

The following are examples of the reports which may be produced by CareOffice.