

## SCHEDULING AND BILLING DEFAULTS

As you may or may not know, we have quite a few defaults built into MaxGold7. These defaults affect how your software will operate, especially in scheduling and billings. You will find your defaults located in various places in the program:

1. User defaults can be accessed through menu item FILES -> USERS. Edit a user (provider) and set defaults in the DEFAULTS, HOT KEYS, OTHERS, FORMS and S. PHYSICAL tabs
2. Set up program wide defaults through menu item FILES -> CONFIGURATION
3. Set up location defaults through menu item FILES -> LOCATION
4. Set up various defaults through menu item UTILITIES -> DEFAULTS

### USER DEFAULTS: Part 1

The screenshot shows the 'Edit User' window for Dr. B. Jennifer McKoy, MD. The window is divided into several sections:

- Personal Information:** First Name (Jennifer), Last Name (McKoy), Professional Name (Dr. B. Jennifer McKoy, MD), Skill Code (053 - Optometry), User No. (01226), Pay To # (01226), Provider (01226), User Id (DR. JEN MCKOY), Work Phone ((204) 785-1546), Hourly Cost (\$0.00).
- Billing Information:** Fee Multiplier (1.000), Extra Bill (\$0.00), City of Winnipeg (Default hospital code for health care billings).
- Scheduling Defaults:** Assigned Station (STATION 1), Def. Hospital (WINNIPEG MUNICIPAL HOSPITALS), Hospital Code (006), Service Location (Not Emergency Nor Out-Patient), Intep. Radiologist, Def. ICD-9 CM, Def. Alt. Doctor, Default Label (Chart (Avery 04015)), Default Appt. Report (Daily Appt. List).
- Checkboxes (Scheduling and Billing Defaults):**
  - Book Time Slot Exclusively for Appointments
  - Warn if no Time Slot exist for an Appointment
  - Warn if Duration of an Appointment is Over One Hour
  - Warn when booking overlapping appointments
  - Warn when booking Appt for patient not in Database
  - Update patient default User and Referring Practitioner upon arrival
  - Focus on Nickname in Tariff
  - Focus on Set Date in Tariff
  - Allow multiple appointment reason
  - Put patient referring practitioner in appointments
  - Referring Practitioner in Billing is Defaulted to Submit
  - Default Referring Provider to the Last In Manual Billing
  - Blank ICD-9 On Manual Billing
  - Referring Practitioner Required in Billing
  - Warn when Scheduling an appt. for Provider other than def.
  - One-Screen Hospital TAB Stop
  - One-Screen Referring Practitioner TAB Stop
  - One-Screen Billing
  - Billing Location TAB Stop
  - Force Sales ID in Scheduler/X Fees
  - Hold back HC claims missing Patient Info.
  - 56-57 Round UP

Red annotations with arrows point to the following fields:

- Assign a station for a provider to affect which group of providers is listed when using the scheduler (points to Assigned Station).
- Set up default Charting Templates for users with Chart Tree activated (points to Charting Setup).
- Default facility codes for radiology billings (points to Facility).
- Default hospital code for health care billings (points to City of Winnipeg).
- Default service location for MB health care billings (points to Service Location).
- Default interpreting radiologist for radiology billings (points to Intep. Radiologist).
- Default billing type on scheduler arrivals - H - health care P-Private (points to Def. ICD-9 CM).
- Default ICD codes for billings (points to Def. ICD-9 CM).
- Default alternate doctor (points to Def. Alt. Doctor).
- Default label and default appointment report (points to Default Label and Default Appt. Report).

## USER DEFAULTS: Part 2

**Callouts:**

- If flagged then scheduler warns if a patient has future appointments booked
- Can flag a user as being a room, an x-ray room or inactive
- Book Time Slot Exclusively: If flagged then the Excl flag is defaulted on all appointments. Appointments with extended durations are displayed on the scheduler
- Warn if no time slot exists: If flagged the scheduler will warn if booking an appointment in a time slot with existing appointment(s) or block times
- Warn if duration over 1 hour: If flagged scheduler warns if appointment is over 1 hour
- Warn when booking overlapping: If flagged then the scheduler warns when booking an appointment that overlaps an existing appointment
- Warn when booking appt for patient not in database: If flagged then the scheduler warns if booking for new patients
- Update patient default user and referring practitioner: If flagged then the program will automatically put the provider whom appointment is booked for and the referring practitioner (if any) in the patient file
- Focus on nickname: If flagged then the user defined billing nickname field is enabled in health care billings
- Focus on set date: If flagged then the program will always stop on the date field in health care billings
- Allow multiple appointment reasons: If flagged then can enter multiple appointment reasons
- Put patient referring practitioner in appointments: If flagged then will display referring doctor in the patient file on all appointments booked
- Referring practitioner in billing is defaulted to submit: If flagged then referring doctor in the patient file will be submitted on health care billings
- Default referring provider to last in manual: If flagged then the referring doctor will be defaulted on manual health care billings to the one used previously
- Blank ICD9 on manual billings: Will present a blank ICD9 on manual health care billings rather than the last ICD9 used for a patient
- Referring practitioner required: If flagged, will require a referring doctor on all billings
- Warn when scheduling an appt for another doctor: If flagged, scheduler warns when booking an appointment to a doctor that is different from the default in patient file

**Form Fields and Settings:**

- First Name: Jennifer, Last Name: McKoy
- Professional Name: Dr. B. Jennifer McKoy, MD
- Skill Code: 053 (Optometry)
- User No: 01226, Pay To #: 01226, Provider: 01226
- User Id: DR. JEN MCKOY, Work Phone: (204) 785-1546, Hourly Cost: \$0.00
- Fee Multiplier: 1.000, Extra Bill: \$0.00
- City of Winnipeg
- Assigned Station: STATION 1
- Def. Hospital: WINNIPEG MUNICIPAL HOSPITALS
- Hospital Code: 006, Charting Setup: Set-Up
- Service Location: Not Emergency Nor Out-Patient
- Def. ICD-CM: [Blank]
- Def. Att. Doctor: [Blank], Def. Bill Type: H
- Default Label: Chart (Avery 04015), Default Appt. Report: Daily Appt. List
- Auto Print "Out Patient Attendance Slip" When Arrived: [Checked]
- Billing Recall TAB Stop: [Checked]
- Simple Patient Chart Label: [Checked]
- Incorporated Billing Type: [Checked]
- Chart Label - print Chart #: [Checked]
- Book Time Slot Exclusively for Appointments: [Checked]
- Warn if no Time Slot exist for an Appointment: [Checked]
- Warn if Duration of an Appointment is Over One Hour: [Checked]
- Warn when booking overlapping appointments: [Checked]
- Warn when booking Appt for patient not in Database: [Checked]
- Update patient default User and Referring Practitioner upon arrival: [Checked]
- Focus on Nickname in Tariff: [Checked]
- Allow multiple appointment reason: [Checked]
- Put patient referring practitioner in appointments: [Checked]
- Referring Practitioner in Billing is Defaulted to Submit: [Checked]
- Default Referring Provider to the Last In Manual Billing: [Checked]
- Blank ICD-9 On Manual Billing: [Checked]
- Referring Practitioner Required in Billing: [Checked]
- Warn when Scheduling an appt. for Provider other than def.: [Checked]
- One-Screen Hospital TAB Stop: [Checked]
- One-Screen Referring Practitioner TAB Stop: [Checked]
- One-Screen Billing: [Checked]
- Billing Location TAB Stop: [Checked]
- Force Sales ID in Scheduler and Billings: [Checked]
- Hold back HC claims missing information: [Checked]
- 56-57 Round Up: [Checked]

## USER DEFAULTS: Hot Keys

**Hot Keys Section:**

Key	Tariff	Services	PERCENT
F1	78509	1	100
F2	79745	1	100
F2	79747	1	100
F2	79750	1	100
F3	78540	1	100
F4	78529	1	100
F5	78550	1	100

**Configuration for F1:**

- Tariff: 8509
- Prefix: 7-Calls
- Service: 1
- PerCent Fee: 100

**Callouts:**

- You can set up user defined hot keys for healthcare billings that correspond to your function keys (F1 to F10) on your keyboard. You can define multiple billing codes for each function key. You can also define the defaults quantity and default percentage. For example function key F1 can be defined to be: Code 8509, Qty 1 at 100% plus Code 8540, Qty 2 at 75%
- To use it simply click on the ADD button, click on which function key you are defining, enter the default code, prefix, quantity and percentage and then click the SAVE button to save. Repeat to add other hot keys.

## USER DEFAULTS: Others

**Edit User**

First Name: Jennifer Last Name: McKoy

Professional Name: Dr. B Jennifer McKoy, MD

User No: 01226 Pay To #: 01226 Provider: 01226

User Id: DR. JEN MCKOY Work Phone: (204) 785-1546

Fee Multiplier: 1.000 Extra Bill: \$0.00

City of Winnipeg

Use letter defaults

Code	Description	DEL	...
OF	OFFICE		

Default back color for weekly/monthly view: Sample.txt

Use pager for EMD

Email: jbbanek@shaw.ca

For users with the MaxGold dispatch feature, this flag is used if the provider uses a pager (as opposed to email device) to receive dispatch messages

Set the default for the color of appointments displayed in the weekly and monthly view (for appointment reasons that have no color defined)

## USER DEFAULTS: Letter Defaults

**Letters default for DR. JEN MCKOY**

Choose the type of letter

Use letter forms

Use standard letters

FORM LETTER THREE

Letter 1 Letter 2

include letterhead  Include patient chart

Initials: JH/nt

Signature: C:\MAX-GOLD7\SIGNATURE.JPG

Letter defaults includes either standard letters 1 and 2 (with default on print letterhead and/or patient chart) or form letters (three styles to choose from)

Can default initials that prints on each letter

Can indicate a default signature for letters (using a scanned JPEG image)

## USER DEFAULTS: Forms

**Edit User**

First Name: Jennifer Last Name: McKoy

Professional Name: Dr. B Jennifer McKoy, MD

Skill Code: 053 Optometry

User No: 01226 Pay To #: 01226 Provider: 01226

User Id: DR. JEN MCKOY Work Phone: (204) 785-1546 Hourly Cost: \$0.00

Fee Multiplier: 1.000 Extra Bill: \$0.00 Type of Provider: Other

0% City of Winnipeg

Templat Monday Tuesday Wednesday Thursday Friday Saturday Sunday Copy Defaults Special Hot Keys Others Forms S.Physical

Blue Cross Provider #

Blue Cross Billing Name

Superbill: C:\MAX-GOLD7\SUPMB1.RTF **Create Superbill**

Superbill #2: C:\MAX-GOLD7\SUPMB2.RTF **Create Superbill**

Can set up (or create and then set up) default SUPERBILL forms. For more information on how to set up the SUPERBILL forms using our Visual Document editor see HOW TO EFFECTIVELY USE THE SUPERBILL

## USER DEFAULTS: S. Physical (SHORT PHYSICAL template)

**Edit User**

First Name: Jennifer Last Name: McKoy

Professional Name: Dr. B Jennifer McKoy, MD

Skill Code: 053 Optometry

User No: 01226 Pay To #: 01226 Provider: 01226

User Id: DR. JEN MCKOY Work Phone: (204) 785-1546 Hourly Cost: \$0.00

Fee Multiplier: 1.000 Extra Bill: \$0.00 Type of Provider: Other

0% City of Winnipeg

Templat Monday Tuesday Wednesday Thursday Friday Saturday Sunday Copy Defaults Special Hot Keys Others Forms S.Physical

ENT: Ear, nose and throat were all normal

HN: Head and neck were normal

CUS:

EYES: Examination of eyes found no problems

CHEST: Chest examination found no problems

ABDO: Abdomen area findings were normal

M/S:

UROGEN:

GYNE:

RECTUM:

For clients using the EMR (electronic medical records), and in particular the SHORT PHYSICAL template, you can define your normal comments for rapid entry of results

## CONFIGURATION DEFAULTS: Main Defaults

**Multicompany:**  
If flagged then you can bill for any healthcare for multiple companies

**Highlight Last record Clicked:**  
If flagged will highlight the last record clicked on the scheduler

**Use Auto Label Reset:**  
If flagged, will reset label position for Panasonic or Okidata ML320 and ML321 dot matrix printers

**Show Charting In Main Menu:**  
If flagged then the EMR module will appear in the main menu as CHART

**Report Date Range Defaults Today:**  
If flagged then the default date range in appointment reports is set to today's date

**Allow Billing for WCB:**  
If flagged, then enables WCB & MPIC billings in Manitoba

**Show Eye History in Main Menu:**  
If flagged then the Eye History module displays in main menu

**Disable Password:**  
If flagged then password required for EMR (charting) is disabled

**Allow Billing for HC:**  
If flagged then enables healthcare billing

**Do Not Allow Patient Chart Edit:**  
If flagged then editing any patient EMR is prohibited as read only

**Permission to Remind for Appointment:**  
If using appointment reminder systems this flag will turn on a feature that requires you to set permission to send reminders in each patient's file

Application Setup  
Medi-Max Version 7.201.0

Multi-Company  
 Highlight Last Record Clicked  
 Use Auto Label Reset (Yes / No)  
 Allow Billing for AutoPac  
 Show Charting in Main Menu

Report Date Range defaults for Today  
 Allow Duplicate PHN Numbers  
 Allow Billing for WCB  
 Show Eye History in Main Menu  
 Disable Password

Allow Billing for HC  
 Do Not Allow Patient chart Edit  
 Permission to Remind for App.

Date Format  
 DD-MM-YYYY  
 MM-DD-YYYY

Chart View  
 Eye Exam  
 Rx

Directory  
 Location  
 Taxes  
 Invoice  
 Inventory  
 Appointment  
 Admin Fee  
 Chart Add

Transmission Directory: C:\MAX-GOLD7\RETURNS\  
 File Returns Directory: C:\MAX-GOLD7\RETURNS\  
 Back-Up Directory: C:\MAX-GOLD7\BACKUP\  
 Scanned Images:  
 Botox Images:

Set your date preference to either Day, Month, Year or Month, Day, Year

Set default directories where files are stored for:

Transmissions - Electronic health care billing files  
 Returns - Electronic health care remittance files  
 Back Up - Default directory where the hard drive backup utility sends files to  
 Scanned Images: Default directory for any scanned images and documents  
 Botox Images: Default directory for any Botox images/digital photo

## CONFIGURATION DEFAULTS: Lab, Radiology and Addresses

Application Setup  
Medi-Max Version 7.201.0

Multi-Company  
 Highlight Last Record Clicked  
 Use Auto Label Reset (Yes / No)  
 Allow Billing for AutoPac  
 Show Charting in Main Menu

Report Date Range defaults for Today  
 Allow Duplicate PHN Numbers  
 Allow Billing for WCB  
 Show Eye History in Main Menu  
 Disable Password

Allow Billing for HC  
 Do Not Allow Patient chart Edit  
 Permission to Remind for App.

Date Format  
 DD-MM-YYYY  
 MM-DD-YYYY

Chart View  
 Eye Exam  
 Rx

Directory  
 Location  
 Taxes  
 Invoice  
 Inventory  
 Appointment  
 Admin Fee  
 Chart Add

Default Lab Code: CML  
 Default Ordering Dr.: DR. JEN MCKROY  
 Expiry Days: 10  
 Def Rad Exam Report: GENERIC  
 Default Radiology: X-RAY ROOM  
 LAB Site ID:

Default Area Code: (204)  
 Default City: WINNIPEG  
 Default State/Prov: MB

Set defaults for area code, city and state/province for adding new patients, vendors, third parties, etc

LAB and RADIOLOGY Defaults:

**Lab Code:**  
Sets default lab for any lab requisitions  
**Ordering Doctor:**  
Sets the default ordering doctor for lab requisitions  
**Expiry Days:**  
Number of days after which lab requisitions will alert you if no lab results are entered  
**Default Radiology Exam Report:**  
Default lab report form for any radiology reports  
**Default Radiology:**  
Default radiology user  
**Lab Site ID:**  
Lab site ID number

## CONFIGURATION DEFAULTS: Taxes

Application Setup  
Medi-Max Version 7.201.0

Multi-Company  
 Highlight Last Record Clicked  
 Use Auto Label Reset (Yes / No)  
 Allow Billing for AutoPac  
 Show Charting in Main Menu

Report Date Range defaults for Today  
 Allow Duplicate PHN Numbers  
 Allow Billing for WCB  
 Show Eye History in Main Menu  
 Disable Password

Allow Billing for HC  
 Do Not Allow Patient chart Edit  
 Permission to Remind for App.

Date Format  
 DD-MM-YYYY  
 MM-DD-YYYY

Chart View  
 Eye Exam  
 Rx

Directory  
 Location  
 Taxes  
 Invoice  
 Inventory  
 Appointment  
 Admin Fee  
 Chart Add

			Accounting Code	Tax Name
Federal Tax	7.00	%	78653	GST
Regional Tax	7.00	%	78654	PST
Other Tax	7.00	%		

Set up your taxes for federal, regional and other. Sets the percentage, accounting code and name of tax. Affects private billings and tax reporting



## CONFIGURATION DEFAULTS: Invoices

**Application Setup**  
Medi-Max Version 7.201.0

Multi-Company  Report Date Range defaults for Today  
 Highlight Last Record Clicked  Allow Duplicate PHN Numbers  
 Use Auto Label Reset (Yes / No)  Allow Billing for WCB  Allow Billing for HC  
 Allow Billing for AutoPac  Show Eye History in Main Menu  Do Not Allow Patient chart Edit  
 Show Charting in Main Menu  Disable Password  Permission to Remind for App.

Date Format:  DD-MM-YYYY  MM-DD-YYYY

Chart View:  Eye Exam:  Rx:

Directory:  Location:  Taxes:  Invoice:  Inventory:  Appointment:  Admin Fee:  Chart Add:

Default Dr. DR. JEN MCKOY  
 Location OF  
 Invoice Form STANDARD I  
 Receipt Form STANDARD  
 Receipt Comments Thank you for your patronage

Calculate Recall Date based on Office Hours  
 Department by User  Department by Location   
 Default Recall Period 6 M Default Recall Reason VISIT

**Callout Boxes:**

- You can select a default user (provider) for invoicing as well as a default location and comments that will print on invoices
- Use the Set-up cancellation charges button to set up automatic invoices for patients who miss or cancel their appointments
- Select from a choice of 9 invoice styles and 5 receipt styles. Add comments that will print on receipts
- Set how recall dates are calculated. If flagged the recall date will only be an actual clinic working day. Group private billings by user or by location and set default recall period and default recall reason

## CONFIGURATION DEFAULTS: Inventory

**Application Setup**  
Medi-Max Version 7.201.0

Multi-Company  Report Date Range defaults for Today  
 Highlight Last Record Clicked  Allow Duplicate PHN Numbers  
 Use Auto Label Reset (Yes / No)  Allow Billing for WCB  Allow Billing for HC  
 Allow Billing for AutoPac  Show Eye History in Main Menu  Do Not Allow Patient chart Edit  
 Show Charting in Main Menu  Disable Password  Permission to Remind for App.

Date Format:  DD-MM-YYYY  MM-DD-YYYY

Chart View:  Eye Exam:  Rx:

Directory:  Location:  Taxes:  Invoice:  Inventory:  Appointment:  Admin Fee:  Chart Add:

Default Markup 2.00  
 Default Location OF  
 Default Taxes  GST  PST  Other  
 Last Inventory Item  
 Sales Acct#  
 COS Acct#  
 Asset Acct#

Inventory Round Up Rule  
 1) 00.00  
 2) 00.99  
 3) 00.95  
 4) None

Pad New Inventory Item with Zeros

**Callout Boxes:**

- Default Markup: Sets default markup the selling price on inventory (ie; a markup of 2.00 would make a selling price of an item costing \$10.00 equal to \$20.00)
- Default Location: Default location for inventory items
- Default Taxes: Tax defaults on any inventory items
- Last Inventory Item: Indicates the last inventory item number used
- Sales, COS, Asset Acct: Sets accounting system numbers
- Sets the sales price to the indicated value for items priced using markup.
- New inventory item numbers are padded with zero's so that inventory item 1 would be displayed as 000001

## CONFIGURATION DEFAULTS: Appointments

Medi-Max Version 7.201.0

Multi-Company  
 Highlight Last Record Clicked  
 Use Auto Label Reset (Yes / No)  
 Allow Billing for AutoPac  
 Show Charting in Main Menu

Report Date Range defaults for Today  
 Allow Duplicate PHN Numbers  
 Allow Billing for WCB  
 Show Eye History in Main Menu  
 Disable Password

Allow Billing for HC  
 Do Not Allow Patient chart Edit  
 Permission to Remind for App.

Date Format:  DD-MM-YYYY  MM-DD-YYYY

**Chart View** | **Eye Exam** | **Rx**  
**Directory** | **Location** | **Taxes** | **Invoice** | **Inventory** | **Appointment** | **Admin Fee** | **Chart Add**

		Back Color	Font Color
Arrived	ARR	...	...
Billed	BIL	...	...
No Show	NOS	...	...
Late	LATE	...	...
Notes	NOTES	...	...

Display cancelled Appointments  
 Display deleted Appointments  
 Highlite Patients with Red in Daylist

You can set both the back color and the font color for any appointment status (Arrivals, Billed, No Show, Cancelled, Late or Notes. If no color (white) then appointments will not change color on updating their status

If checked these defaults will affect cancelled and deleted appointments and display them with a red font (otherwise they disappear from view). Can also highlight patients selected with red on the daylist view.

## CONFIGURATION DEFAULTS: Admin Fee

Medi-Max Version 7.201.0

Multi-Company  
 Highlight Last Record Clicked  
 Use Auto Label Reset (Yes / No)  
 Allow Billing for AutoPac  
 Show Charting in Main Menu

Report Date Range defaults for Today  
 Allow Duplicate PHN Numbers  
 Allow Billing for WCB  
 Show Eye History in Main Menu  
 Disable Password

Allow Billing for HC  
 Do Not Allow Patient chart Edit  
 Permission to Remind for App.

Date Format:  DD-MM-YYYY  MM-DD-YYYY

**Chart View** | **Eye Exam** | **Rx**  
**Directory** | **Location** | **Taxes** | **Invoice** | **Inventory** | **Appointment** | **Admin Fee** | **Chart Add**

Sales Acct#

Use Dollar Amount Stored in Insurance Co. File

If Using % of coverage to base Admin Fee, Select a Category

Default Administration Fee 0.00

% Covered	Fee

Add Edit Delete

Administration Fee defaults used for insurance billings. Amounts set here will be charged on invoices in private billings as set up

LOCATION DEFAULTS: Location defaults can be accessed through the menu item FILES -> LOCATION. This section is used to set up multiple locations for clients with multiple clinics as well as to set up for separate billings and letters for multiple provider offices. The location identifies a unique department for billing purposes and each location can set up a logo and letterhead information used for letters and invoices:

Location Information

Location Code: OF

Name: OFFICE

Department: [ ]

Invoice Comment: JUST WHAT THE DOCTOR ORDERED

Mailing Address | Business Address | **Company Logo** | Letterhead

MAX SYSTEMS INC.

Find  
Restore  
Modify

Use the Company Logo tab to set up a logo (bmp or jpeg file format) for each location or department

Location Information

Location Code: OF

Name: OFFICE

Department: [ ]

Invoice Comment: JUST WHAT THE DOCTOR ORDERED

Mailing Address | Business Address | Company Logo | **Letterhead**

Main Street Surgery Centre

Suite 234 - 122 Main Street

Winnipeg, MB R3E 1B4

Ph: (204) 786-1460 Fax: (204) 786-1522

www.maxsystems.com

The letterhead tab is used to set up the letterhead (address information as it would appear on letters and invoices) for each location and/or department



