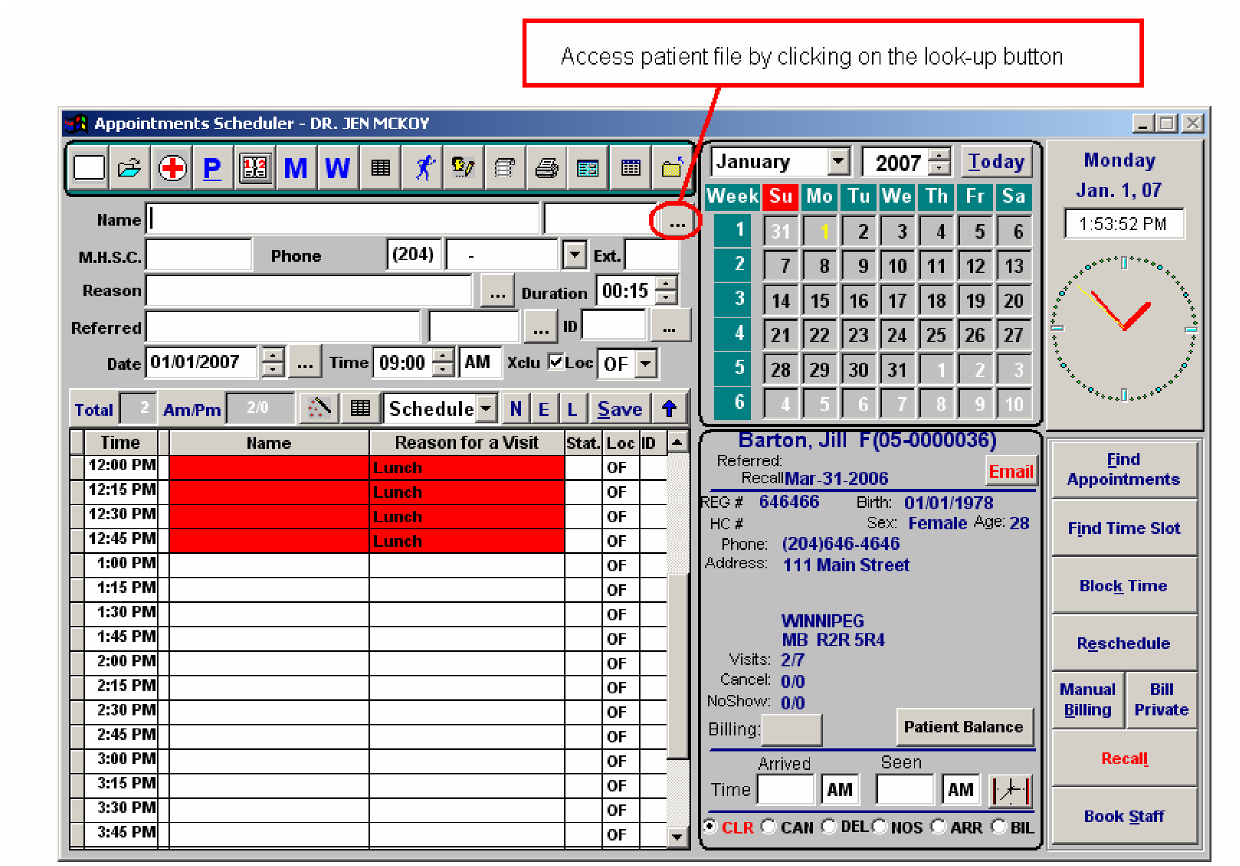
Patient Setup Manual

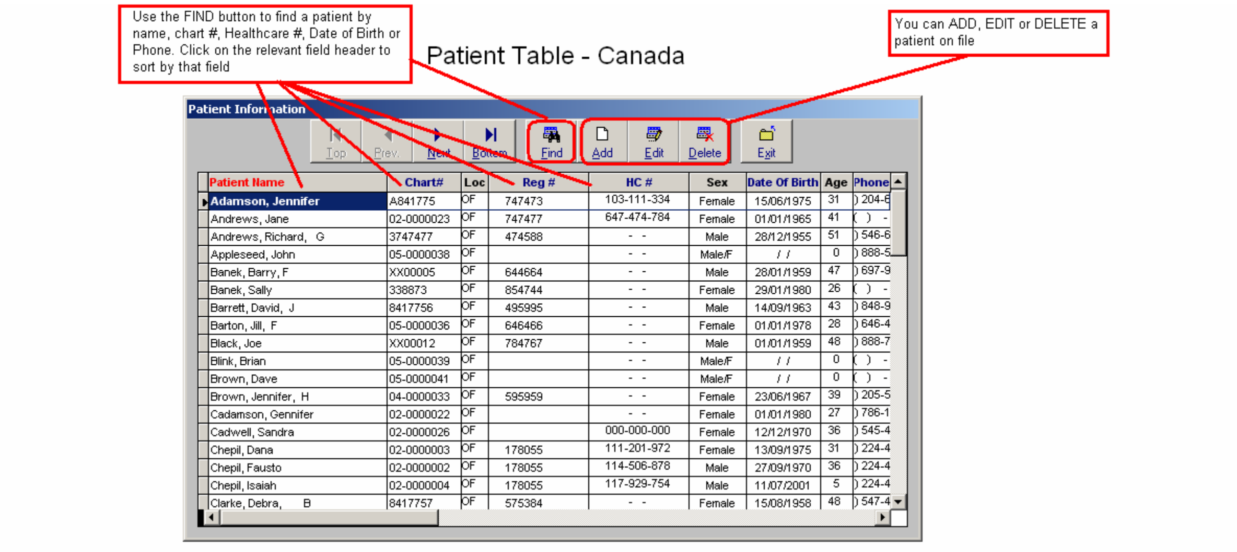
The patient setup in MaxGold can be very straightforward or quite involved depending on which modules and functions you will be using and which region you are using the program in. Some sections on the patient setup apply primarily for U.S. clients, other sections are geared towards Canadian healthcare whereas some sections can cross over various modules and regions. There are several ways to access the patient file in MaxGold.

One way to access patient information is through the main menu item FILES -> PATIENTS:

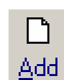
You can also access the patient files throughout MaxGold wherever you have a look-up to the patient file within various functions such as Healthcare Billings, Private Billing, Scheduling, etc. By clicking on the look-up button next to the patient name, you access the patient file where you can ADD or EDIT patient information:



Regardless of where you access the patient file, you will get to the patient browse table. Depending on your region, the information displayed on the table will differ slightly:



Patient Name	Chart#	Loc	Reg #	HC #	Sex	Date Of Birth	Age	Phone
Adamson, Jennifer	A841775	OF	747473	103-111-334	Female	15/06/1975	31	) 204-6
Andrews, Jane	02-0000023	OF	747477	647-474-784	Female	01/01/1965	41	( ) -
Andrews, Richard, G	3747477	OF	474588	- -	Male	28/12/1955	51	) 546-6
Appleseed, John	05-0000038	OF		- -	Male/F	/ /	0	) 888-5
Banek, Barry, F	XX00005	OF	644664	- -	Male	28/01/1959	47	) 697-9
Banek, Sally	338873	OF	854744	- -	Female	29/01/1980	26	( ) -
Barrett, David, J	8417756	OF	495995	- -	Male	14/09/1963	43	) 848-9
Barton, Jill, F	05-0000036	OF	646466	- -	Female	01/01/1978	28	) 646-4
Black, Joe	XX00012	OF	784767	- -	Male	01/01/1959	48	) 888-7
Blink, Brian	05-0000039	OF		- -	Male/F	/ /	0	( ) -
Brown, Dave	05-0000041	OF		- -	Male/F	/ /	0	( ) -
Brown, Jennifer, H	04-0000033	OF	595959	- -	Female	23/06/1967	39	) 205-5
Cadamson, Gennifer	02-0000022	OF		- -	Female	01/01/1980	27	) 786-1
Cadwell, Sandra	02-0000026	OF		000-000-000	Female	12/12/1970	36	) 545-4
Chepil, Dana	02-0000003	OF	178055	111-201-972	Female	13/09/1975	31	) 224-4
Chepil, Fausto	02-0000002	OF	178055	114-506-878	Male	27/09/1970	36	) 224-4
Chepil, Isaiah	02-0000004	OF	178055	117-929-754	Male	11/07/2001	5	) 224-4
Clarke, Debra, B	8417757	OF	575384	- -	Female	15/08/1958	48	) 547-4

To add a patient you need to simply click on the 

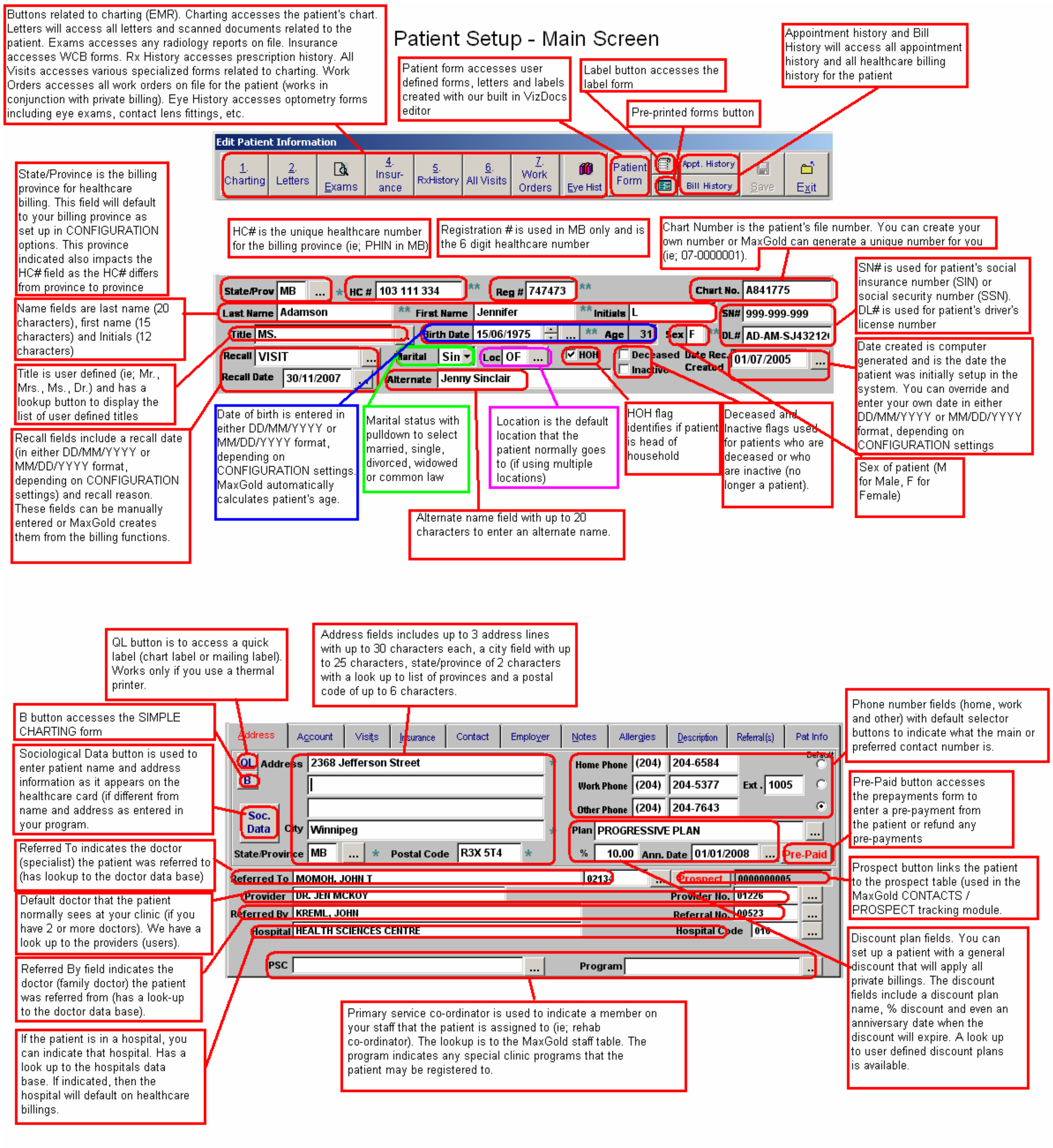
button. This will simply give you a blank patient form to add a patient. If you want to find an existing patient to edit their information on file or simply access the information you have a couple of options. Patients are sorted (ordered) by last name by default. However, you can change the order that existing patients are ordered by clicking on the title of the column. You can sort patients by;

- Name
- Chart #
- Registration # (Manitoba Only)
- HC #
- Date of Birth
- Phone

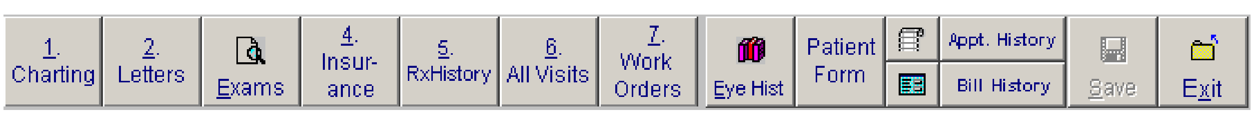
Once you have selected the sort order, you can simply use the keyboard to type in what you want to find and the program will go to the correct record. If you wanted to find a patient with a last name of SMITH you simply start typing the last name S-M-I-T-H. If you sorted by phone then you would type in the phone number you want 2-0-4-5-5-5-1-2-1-2. As you type the program is finding the match. However, to use this method effectively requires smooth and steady typing. If you are a slow or inexperienced typist and hesitate on typing letters or numbers (as you look for them) you may find that the program resets the search. That is, it assumes you have found a record and are looking for another one. In this case you may find it easier to use the button as it offers you a chance to type in what you are looking for at your own speed.

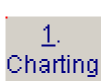
Patient Setup – Main Screen and Address Tab:

Now, let's look at how to set up a patient and the various options that you have. Patients can be set up with a minimum of information (ie; necessary data required for healthcare billings) but you can also expand the information significantly. A lot of the patient information that you will enter depends on the type of clinic you operate, the types of billing that your clinic does and even what information you wish to maintain on file. The main screen contains the fields needed for basic patient information related to healthcare billings. Keep in mind that not all fields are required.



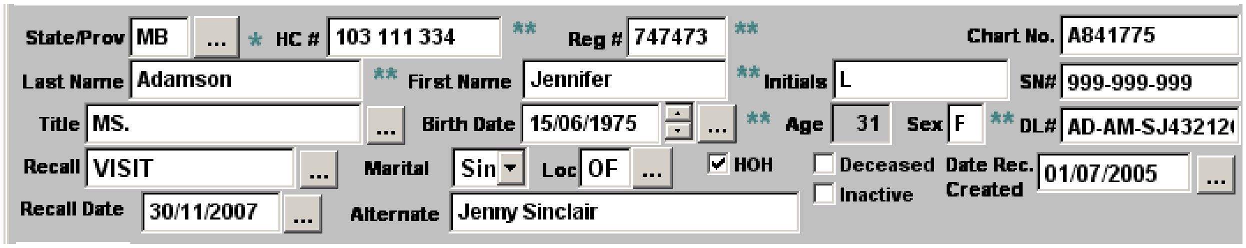
At the top of the patient screen you will notice various buttons. These buttons are related to charting (EMR) and other functions built into MaxGold.



- Charting button  accesses the patient's chart.

- Letters button 2. Letters will access all letters and scanned documents related to the patient.
- Exams button accesses any radiology reports on file.
- Insurance button 4. Insur-ance accesses WCB forms.
- Rx History button 5. RxHistory accesses prescription history.
- All Visits button 6. All Visits accesses various specialized forms related to charting.
- Work Orders button 7. Work Orders accesses all work orders on file for the patient (works in conjunction with private billing).
- Eye History button accesses optometry forms including eye exams, contact lens fittings, etc.
- Patient form button Patient Form accesses user defined forms, letters and labels created with our built in VizDocs editor
- Label button accesses the label form
- Pre-printed forms button accesses pre-printed forms
- Appointment history button Appt. History and Bill History button Bill History will access all appointment history and all healthcare billing history for the patient

Just below the buttons is the main patient information section. You will notice that some fields have a single or double asterisk next to them. These indicate fields that are required if you are using the healthcare billing module and if the patient is being seen under healthcare billing.



State/Province is the billing province for healthcare billing. This field will default to your billing province as set up in CONFIGURATION options. This province indicated also impacts the HC# field as the HC# differs from province to province.

The HC # field is for the patient healthcare number as indicated on their health card. In Manitoba this would be the 9 digit PHIN number, in Alberta this is the ULI number. Each province has their own unique format. In addition the healthcare number has a check digit routine assigned to it so MaxGold can indicate if the HC# is valid or not.

Registration # is used in MB only and is the 6 digit healthcare number that appears on a patient health card.

Chart Number is the patient's file number. You can create your own number or MaxGold can generate a unique number for you (ie; 07-0000001). Chart number can be up to 10 digits long.

SN# is used for patient's social insurance number (SIN) or social security number (SSN). DL# is used for patient's driver's license number.

Date created is computer generated and is the date the patient was initially setup in the system. You can override and enter your own date in either DD/MM/YYYY or MM/DD/YYYY format, depending on CONFIGURATION settings.

Name fields are last name (20 characters), first name (15 characters) and Initials (12 characters)

Title is user defined (ie; Mr., Mrs., Ms., Dr.) and has a lookup button to display the list of user defined titles

Recall fields include a recall date (in either DD/MM/YYYY or MM/DD/YYYY format, depending on CONFIGURATION settings) and recall reason. These fields can be manually entered or MaxGold creates them from the billing functions.

Date of birth is entered in either DD/MM/YYYY or MM/DD/YYYY format, depending on CONFIGURATION settings. MaxGold automatically calculates patient's age.

Sex of patient (M for Male, F for Female)

Deceased and Inactive flags used for patients who are deceased or who are inactive (no longer a patient).

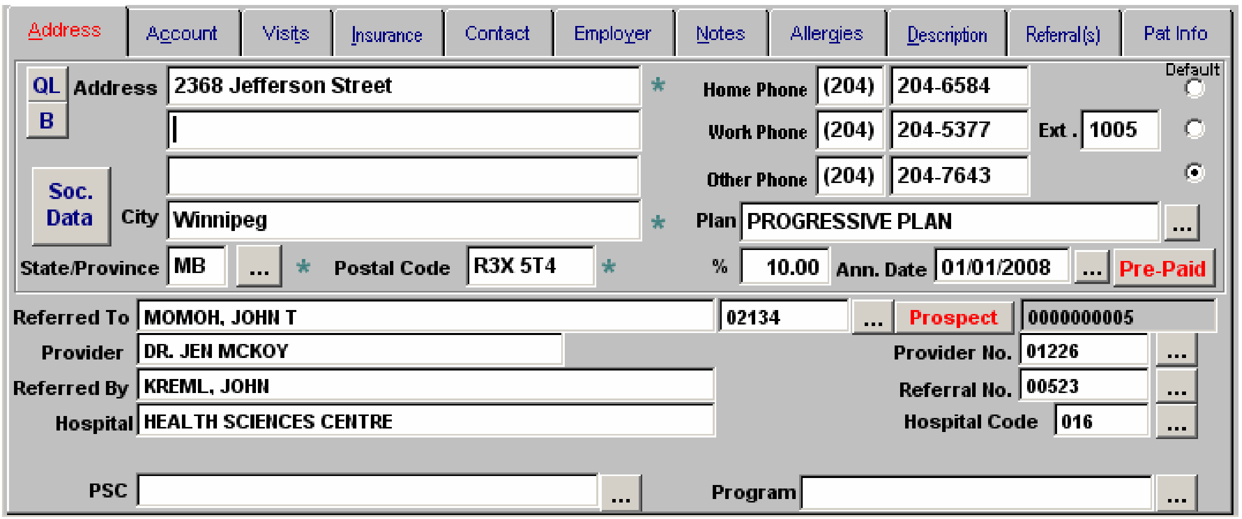
HOH flag identifies if patient is head of household.

Marital status with pull-down to select if patient is single, married, divorced, widowed or common law.

Location is the default location that the patient normally goes to (if using multiple locations).

Alternate name field has up to 20 characters to enter an alternate name for the patient.

Finally we get to the first of the patient TABS starting with the ADDRESS tab:



Phone number fields (home, work and other) with default selector buttons to indicate what the main or preferred contact number is. The area code defaults to setting in CONFIGURATION.

Address fields includes up to 3 address lines with up to 30 characters each, a city field with up to 25 characters, state/province of 2 characters with a look up to list of provinces and a postal code of up to 6 characters. The city and province default to settings in the CONFIGURATION.

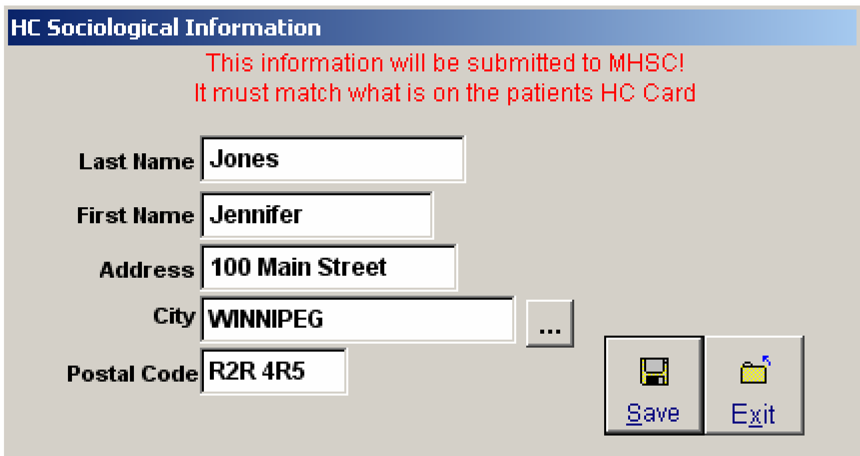
QL button 

is to access a quick label (chart label or mailing label). Note: works only if you use a thermal printer (Star Micronics TSP743 or 800 series).

B button 

accesses the SIMPLE CHARTING form.

Sociological Data button Soc. Data is used to enter patient name and address information as it appears on the healthcare card (if different from name and address as entered in your program. This might happen if the patient has married and used their married named when they became a patient but the provincial healthcare still lists the patient under their maiden name. This addresses the code 44 errors in MB:



Referred To field indicates the doctor (specialist) the patient was referred to (has a look-up to the doctor data base).

Provider field indicates the doctor that the patient normally sees at your clinic (if you have 2 or more doctors). We have a look up to the providers (users).

Referred By field indicates the doctor (family doctor) the patient was referred from (has a look-up to the doctor data base).

If the patient is in a hospital, you can indicate that hospital. Has a look up to the hospitals data base. If indicated, then the hospital will default on healthcare billings.

Pre-Paid button Pre-Paid accesses the prepayments form to enter a pre-payment from the patient or refund any pre-payments.

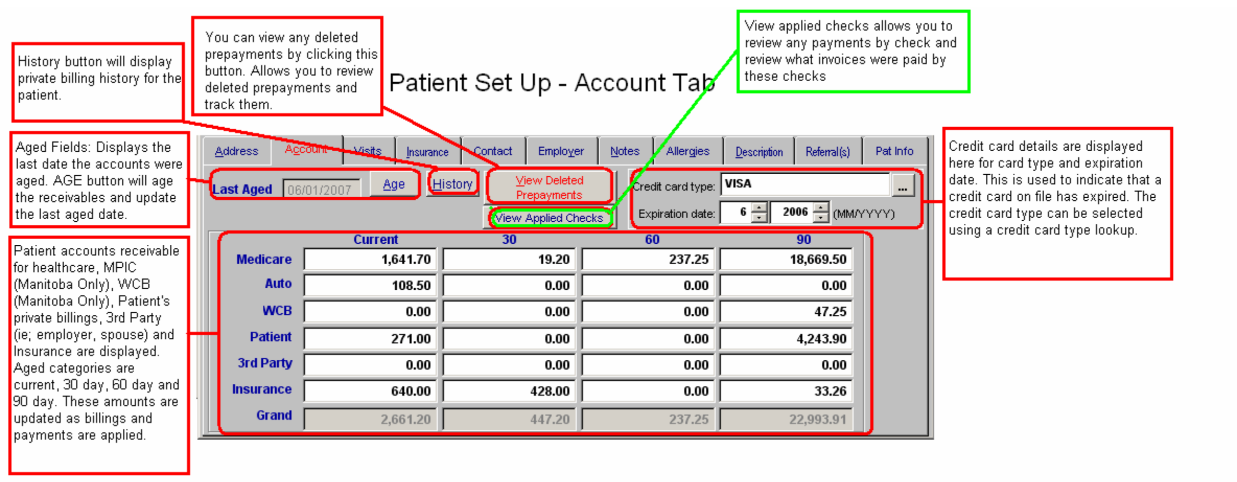
Prospect button Prospect links the patient to the prospect table (used in the MaxGold CONTACTS / PROSPECT tracking module.

Discount plan fields. You can set up a patient with a general discount that will apply all private billings. The discount fields include a discount plan name, % discount and even an anniversary date when the discount will expire. A look up to user defined discount plans is available. If you intend to offer a patient a long term discount, simply set a date (in either DD/MM/YYYY or MM/DD/YYYY format, depending on CONFIGURATION settings) far off in the future (ie; Dec 31, 2099). Discount will cease working past the anniversary date set.

Primary service co-ordinator is used to indicate a member on your staff that the patient is assigned to (ie; rehab co-ordinator). The lookup is to the MaxGold staff table. The program indicates any special clinic programs that the patient may be registered to.

Account Tab:

The account tab in the patient file is used to primarily for billing related information and displays the aged accounts receivable for various billing categories for the patient. It also stores the patient credit card information and is the tab from which to access deleted pre-payments:



Accounts Receivable Section: Patient accounts receivable for healthcare, MPIC (Manitoba Only), WCB (Manitoba Only), Patient's private billings, 3rd Party (ie; employer, spouse) and Insurance are displayed. Aged categories are current, 30 day, 60 day and 90 day. These amounts are updated as billings and payments are applied.

Aged Fields: Displays the “last date” the accounts receivables were aged. AGE button will age the receivables and update the last aged date.

History Button: History button will display private billing history for the patient.

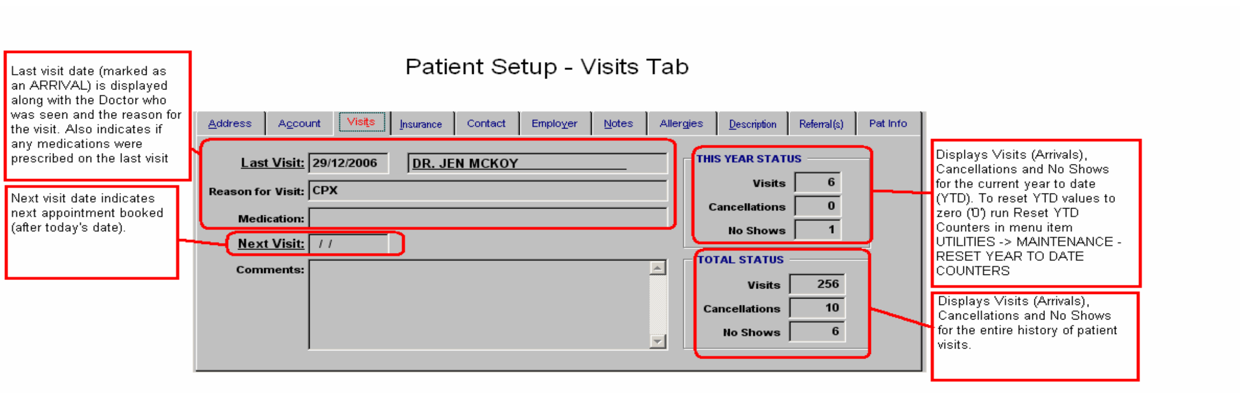
View Deleted Prepayments Button: You can view any deleted prepayments by clicking this button. Allows you to review deleted prepayments and track them.

View Applied Checks Button: View applied checks allows you to review any payments by check and review what invoices were paid by these checks.

Credit Card Fields: Credit card details are displayed here for card type and expiration date. This is used to indicate that a credit card on file has expired. The credit card type can be selected using a credit card type lookup. *Note that you can get a report of expired credit cards by accessing the report off the main menu REPORTS -> CREDIT CARDS EXPIRATION.*

Visits Tab:

The visits tab is used primarily to record some basic visit statistics on the patient.



Last Visit Date Fields: Last visit date (marked as an ARRIVAL) is displayed along with the Doctor who was seen and the reason for the visit. Also indicates if any medications were prescribed on the last visit.

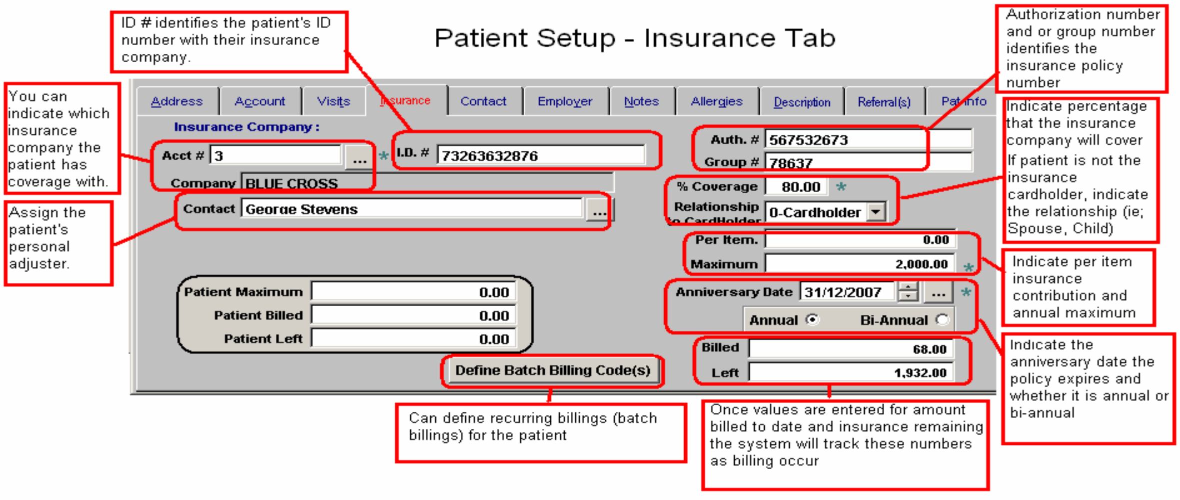
Next Visit: Next visit date indicates next appointment booked (after today's date).

This Year's Visits Details: Displays Visits (Arrivals), Cancellations and No Shows for the current year to date (YTD). To reset YTD values to zero ('0') run Reset YTD Counters in menu item UTILITIES -> MAINTENANCE - RESET YEAR TO DATE COUNTERS

Total (Lifetime) Visit Details: Displays Visits (Arrivals), Cancellations and No Shows for the entire history of patient visits.

Insurance Tab:

The Insurance tab allows you to enter 3rd party or insurance coverage that the patient has. This affects the private billing function.



Account: You can indicate which insurance company the patient has coverage with.

Contact: Assign the patient's personal adjuster.

ID#: ID # identifies the patient's ID number with their insurance company.

Auth # / Group #: Authorization # and or group number identifies the insurance policy number

% Coverage: Indicate percentage that the insurance company will cover.

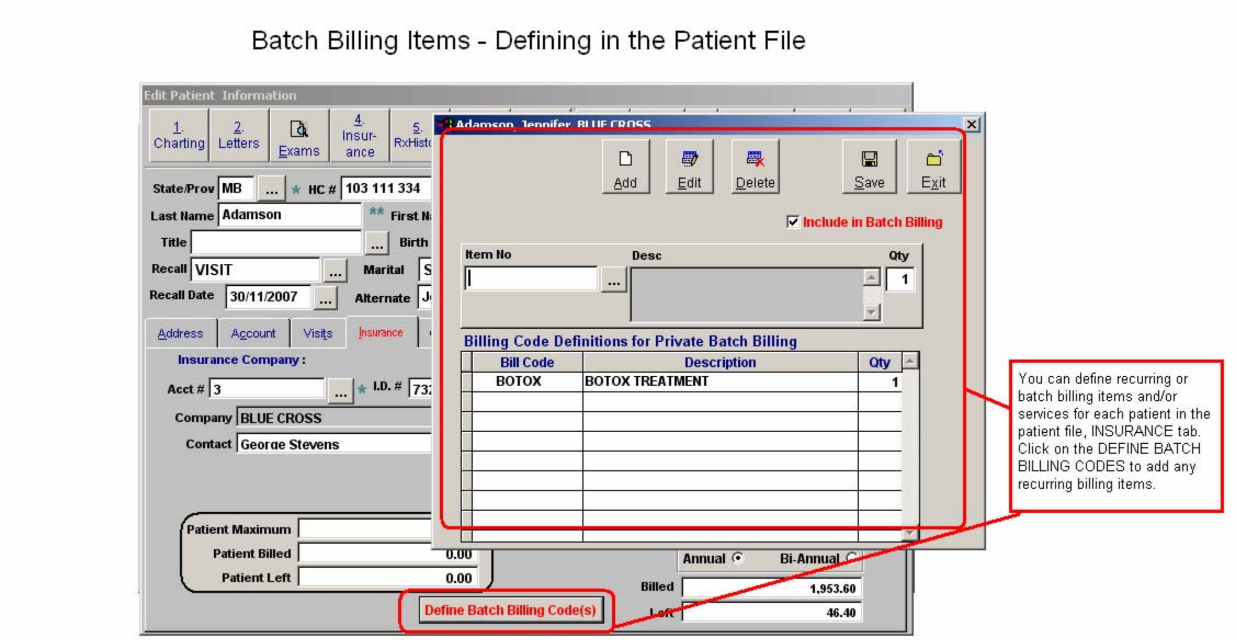
Relationship To Cardholder: If patient is not the insurance cardholder, indicate the relationship (ie; Spouse, Child).

Per Item / Maximum: Indicate the maximum insurance billing per item as well as the annual maximum insurance billing allowed.

Anniversary Date: Indicate the anniversary date the policy expires and whether it is annual or bi-annual.

Billed / Left: Once values are entered for amount billed to date and insurance remaining the system will track these numbers as billing occur.

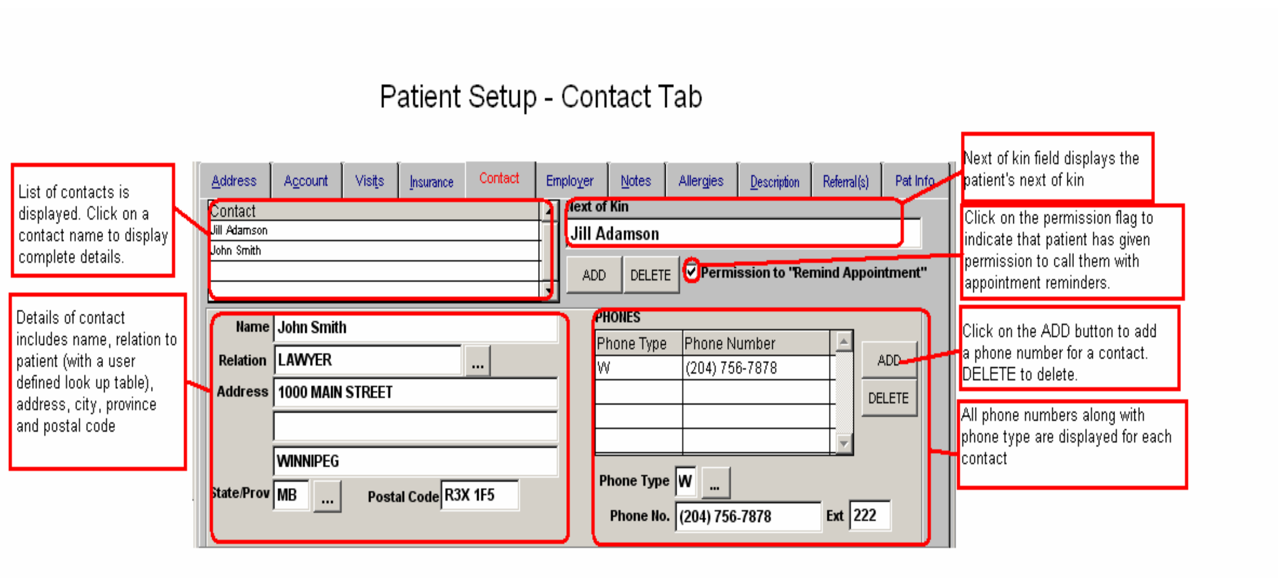
Define Batch Billings: Used to define recurring (batch) billing codes that are billed on a recurring or regular interval (ie; monthly billing). MaxGold can produce automated billings by using the batch billing function.



You can define recurring or batch billing items and/or services for each patient in the patient file, INSURANCE tab. Click on the DEFINE BATCH BILLING CODES to add any recurring billing items.

Contact Tab:

The contact tab is used to store any contacts that the patient may have. The contacts are user defined so the list can include family, friends, legal counsel, etc.



Contact Display Section: List of contacts is displayed. Click on a contact name to display complete details.

Contact Details Section: Details of contact includes name, relation to patient (with a user defined look up table), address, city, province and postal code. Click on the contact ADD button to add a new contact. Click on the “SAVE” button to save a new contact.

Contact Phone Numbers: All phone numbers along with phone type are displayed for each contact. To add a phone number to a contact click on the ADD button and enter phone type (with user defined look up) and phone number. Click on SAVE to save the phone number to that contact

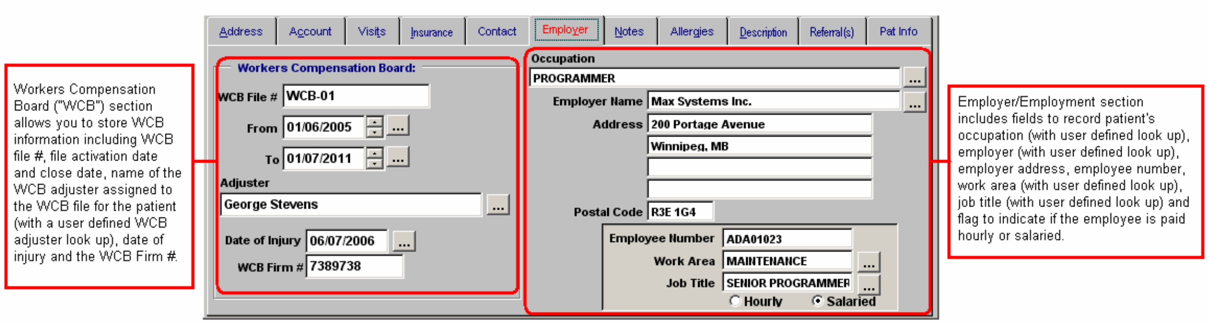
Next of Kin Field: Next of kin field displays the patient's next of kin.

Permission to Remind for Appointment Flag: Click on the permission flag to indicate that patient has given permission to call them with appointment reminders.

Employer Tab:

The Employer Tab is used to store information about the patient’s employer and occupation. It also has a section to store Worker’s Compensation Board (“WCB”) information. In Manitoba the WCB information is linked to the WCB billing function.

Patient Setup - Employer Tab

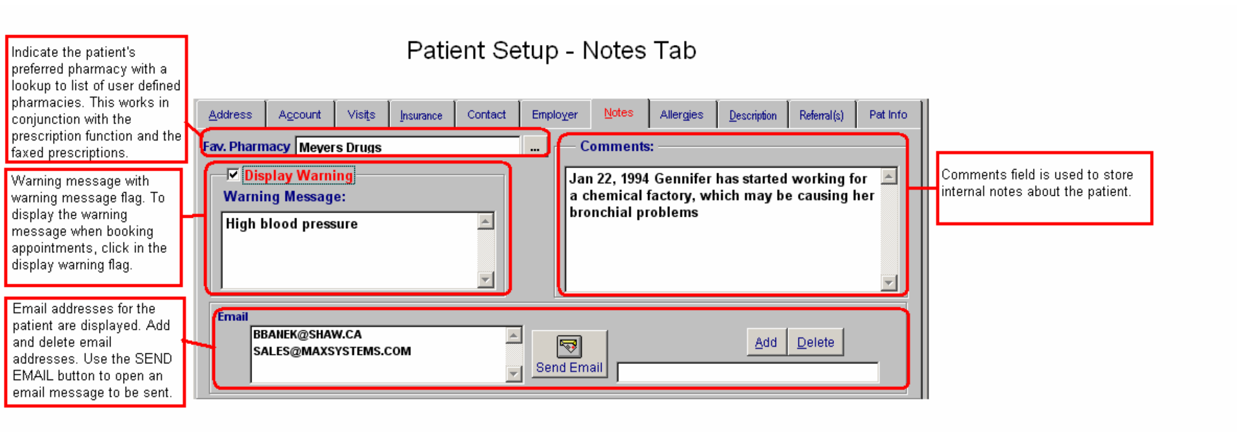


WCB Section: Workers Compensation Board ("WCB") section allows you to store WCB information including WCB file #, file activation date and close date, name of the WCB adjuster assigned to the WCB file for the patient (with a user defined WCB adjuster look up), date of injury and the WCB Firm #.

Employer / Employment Section: Employer/Employment section includes fields to record patient's occupation (with user defined look up), employer (with user defined look up), employer address, employee number, work area (with user defined look up), job title (with user defined look up) and flag to indicate if the employee is paid hourly or salaried.

Notes Tab:

The notes tab is used to add internal patient notes and warning message management. It is also the section where you can add patient email addresses, indicate a preferred pharmacy and even send emails from.



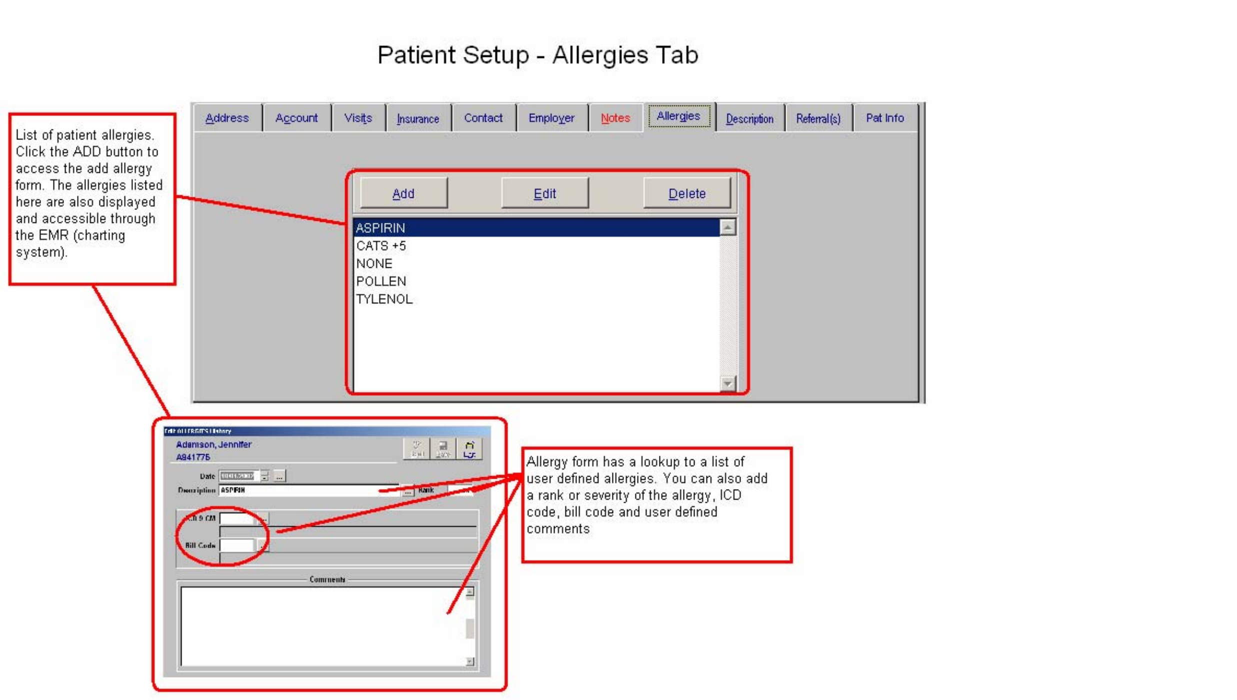
Favourite Pharmacy: Indicate the patient's preferred pharmacy with a lookup to list of user defined pharmacies. This works in conjunction with the prescription function and the faxed prescriptions.

Display Warning Message Section: Warning message with warning message flag. To display the warning message when booking appointments, click in the display warning flag.

Email Section: Email addresses for the patient are displayed. Add and delete email addresses. Use the SEND EMAIL button to open an email message to be sent.

Comments Field: Comments field is used to store internal notes about the patient.

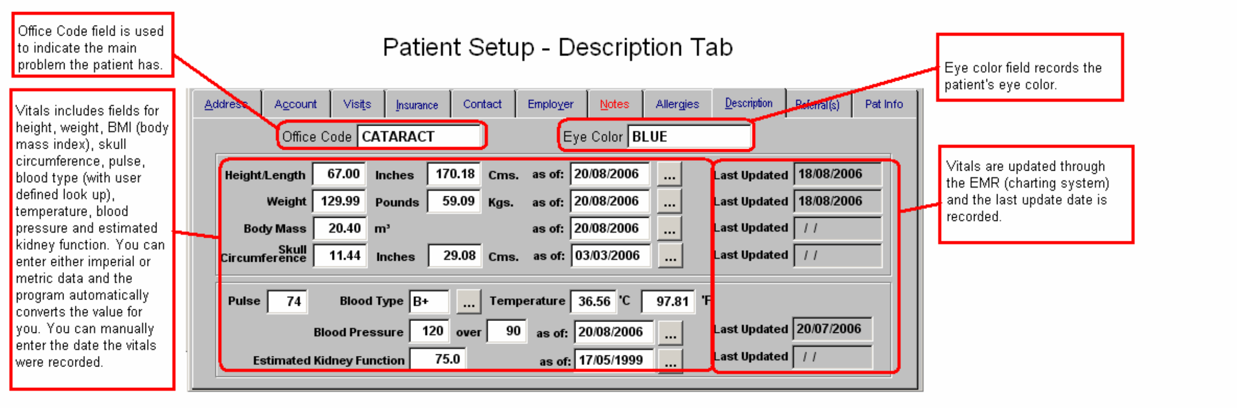
Allergies Tab:



Allergy List: List of patient allergies. Click the ADD button to access the add allergy form. The allergies listed here are also displayed and accessible through the EMR (charting system). Allergy form has a look-up to a list of user defined allergies. You can also add a rank or severity of the allergy, ICD code, bill code and user defined comments.

Description Tab:

The description tab is used to store patient vitals such as height, weight, BMI (body mass index), skull circumference, pulse, blood type, blood pressure, temperature and estimated kidney function. These vitals are also accessible via the EMR (charting) module. The vitals recorded can be manually entered in this tab along with the date the vital was recorded. The vitals are updated through the EMR as new vitals are taken with the latest date vital was recorded being indicated.



Office Code: Office Code field is used to indicate the main problem the patient has.

Eye Colour: Indicates the patient’s eye colour.

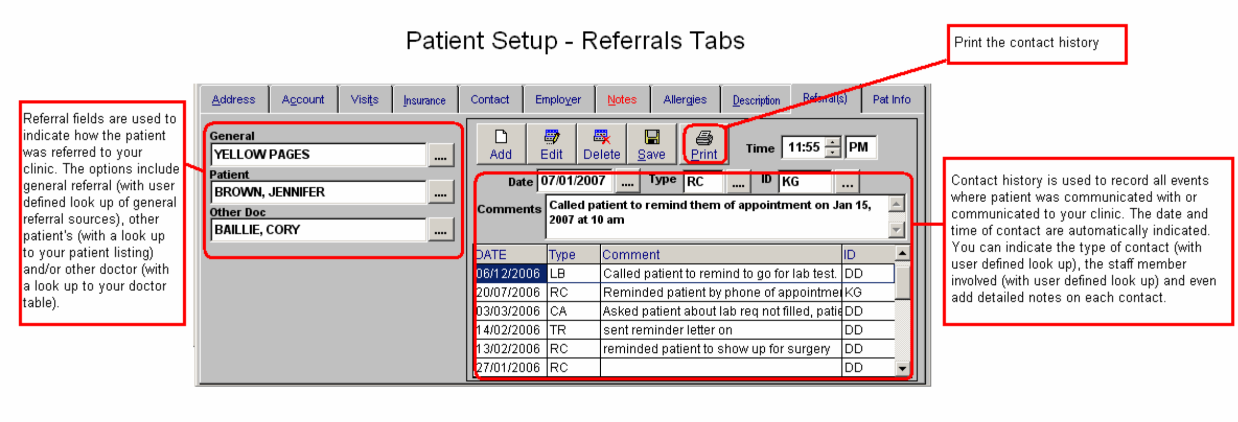
Vitals Section: Vitals includes fields for height, weight, BMI (body mass index), skull circumference, pulse, blood type (with user defined look up), temperature, blood pressure and estimated kidney function. You can enter either imperial or metric data and the program automatically converts the value for you. You can manually enter the date the vitals were recorded.

Last Updated Dates: Vitals are updated through the EMR (charting system) and the last update date is recorded.

<u>Referrals Tab:</u>

The referrals tab (see next page) is used to record where the patient was referred to your clinic. In addition it also contains the very powerful contact history with the patient. That is, a history of all contacts and memo’s regarding the patient and your clinic.

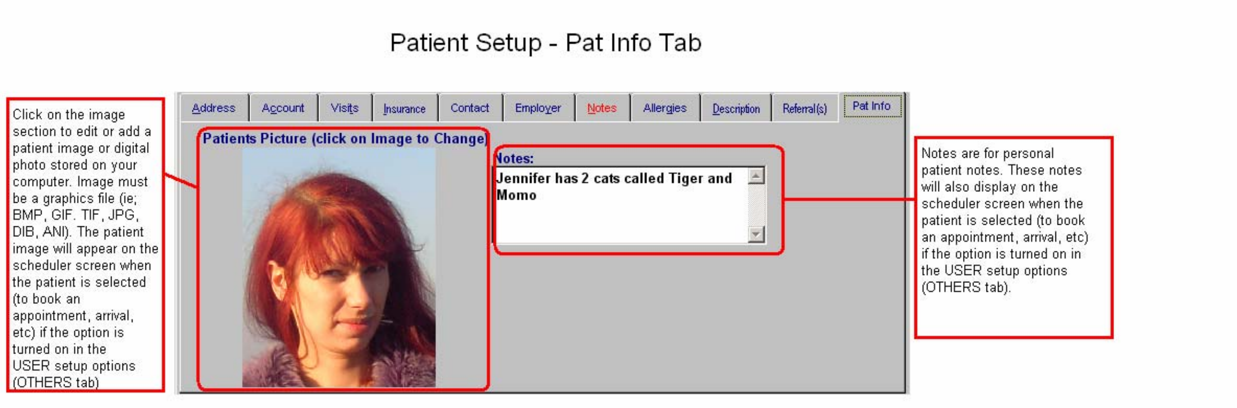
Referral Section: Referral fields are used to indicate how the patient was referred to your clinic. The options include general referral (with user defined look up of general referral sources), other patient's (with a look up to your patient listing) and/or other doctor (with a look up to your doctor table).



Contact History: Contact history is used to record all events where patient was communicated with or communicated to your clinic. The date and time of contact are automatically indicated. You can indicate the type of contact (with user defined look up), the staff member involved (with user defined look up) and even add detailed notes on each contact. You can print out the complete contact history.

<u>Pat Info Tab:</u>

The patient information tab is used to record the patient's photo and personal notes.



Patient Picture: Click on the image section to edit or add a patient image or digital photo stored on your computer. Image must be a graphics file (ie; BMP, GIF. TIF, JPG, DIB, ANI). The patient image will appear on the scheduler screen when the patient is selected (to book an appointment, arrival, etc) if the option is turned on in the USER setup options (OTHERS tab).

Personal Notes: Notes are for personal patient notes. These notes will also display on the scheduler screen when the patient is selected (to book an appointment, arrival, etc) if the option is turned on in the USER setup options (OTHERS tab).