PUMPKIN SYSTEMS

PumpkinPMS

Medical Practice Account Management System

Users Manual for v7.0.05

10 August 2008



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CONTACT DETAILS

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1 INTRODUCTION

This application was originally constructed for the management of client/patient accounts for an occupational therapy practice written for MS Access97 and was subsequently extended to include physiotherapy. From v 7.x onwards many other practice types are catered for. Although based on MSAccess the user does not need to buy Access as the necessary runtime files are packaged with this application (hence why the installation package is so big). There is no electronic data transfer through EDI and all statements are intended to be mailed through the normal snail-mail postal services, or you could email them. This application is intended for use by the small practitioner and as you get bigger you may find the posting of statements an annoyance and an unacceptable cost.

All that said the system is well suited to the small practitioner and will enable you to manage your accounts yourself; not simply by sending out statements but also by tracking who owes what, for how long and how your business is performing in terms of services rendered vs income and tax summaries. Facilities to manage locums are also included as is basic ICD10 functionality.

Items that are considered important for the success of the system are highlighted by a symbol as shown opposite.



1.1 WHAT'S NEW IN VERSION 7.0

The main difference is the ability to archive old records. The website lists the incremental changes (<u>http://www.krugs.co.za/PumpkinSystems/PumpkinPMS.htm</u>).

1.2 CONDITIONS OF USE

You didn't pay for this product so I don't promise to support it. I do this for fun in my spare time so I'll assist you where I can. You will, however, need to register with me before using it as discussed below – this is just so I know if anybody out there is finding this useful or if I really do need to find a life. Feel free to pass it on to your colleagues. Conditions of use, hmm, I'd value your feedback – what doesn't work, what extra features would you like, what do you like for that matter.

Legal stuff...I have no idea. If I'm doing bad stuff I'm sure someone will let me know.

1.3 REQUIREMENTS

You will need Access2002/2003 or if you don't have that then your operating system must be at least Windows2000 SP3 or XP in order to use the runtime files that can be downloaded from the website.

If you already have Access2002/2003 installed on your machine then you only need the installation file called PumpkinPMS705.exe which can be downloaded from http://www.krugs.co.za/PumpkinPMS705.exe which can be downloaded from http://www.krugs.co.za/PumpkinSystems/PumpkinPMS705.exe which can be downloaded from http://www.krugs.co.za/PumpkinSystems/PumpkinPMS.htm. If you don't have Access2002/2003 installed then you can download the runtime installation file Access2003RT.exe from the same website.



What are runtime files? It's basically a knocked down version of Access that can be used to run an application, but not to design one (as the full version of Access can). Runtime files are freely distributable.

Once installed you need at least two .mdb files for the system to work. These are included in the installation package PumpkinPMS705.exe:-

- 1. PumpkinPMS.mdb this is the front end application that you will be using. It contains the forms and reports and whatnot that you see and interact with. There's no actual data in here.
- 2. PumpkinPMS_data.mdb this is where your data actually sits; you don't see this and don't actually interact with it directly.

In addition to the two files above whenever you wish to install new NHRPL rates (on first installation and once a year thereafter) you will need a third file:-

3. NHRPL 2006_04.mdb (or another version of this file) – this contains the NHRPL tariffs and new versions can be downloaded from http://www.medicalschemes.com. The actual name of the file will change with the newer versions as they are issued by the Council. This file contains tariff information for all practice types, but you only need those tariffs relevant to your practice. Once your tariffs have been imported into the application (explained below), then you no longer need the NHRPL file until the next annual tariff review. This file is not included with the installation package as I think I'm not allowed to do that, but you can get it from the website mentioned above. Please note that you do not https://www.medicalschemes.com. The actual name of the file will change with the newer versions as they are issued by the Council. This file contains tariff information for all practice types, but you only need those tariffs relevant to your practice. Once your tariffs have been imported into the application (explained below), then you no longer need the NHRPL file until the next annual tariff review. This file is not included with the installation package as I think I'm not allowed to do that, but you can get it from the website mentioned above. Please note that you do not https://www.medicalschemes.com.

Note that you can set up whatever tariff structures you like, you're not restricted to the NHRPL (see Section 2.6.6).

And in addition to that...

4. If, after a few years, the application is starting to slow down with all the data in it you may wish to archive some of the old stuff. In this case you will need the file PumpkinPMS_archive.mdb which is included in the installation package.

1.4 **MS** ACCESS BASICS

Access makes use of tables, queries, forms and reports; there are also macros and modules, but they do not concern us here.

Tables: these can be thought of as tables as you would commonly think of them with rows and columns. The tables hold the basic, raw data; not calculations that might be derived from the raw data. You will, generally speaking, not need to use the tables directly; just be aware that this is where your raw data actually sits. An example is shown below.



					Field	1		Field							
III tTreatDetails : Table															
	Π	Treat ID	ClientRef	StmtDate	UpdateDa	ate	TreatDate	TreatCode	TreatCo	TreatCo	TreatCo	TreatCo	Description	-	
	+	4	0367	01/06/2002	01/06/2002 (8:18:09	27/05/2002	72702					Complex evaluation/counselling at		_
	+	5	0367	01/06/2002	01/06/2002 (8:21:19	27/05/2002	2					Payment by client - kontant 👘 📍	H	— Record
	+	6	0379	29/06/2002	28/06/2002 1	9:47:14	25/06/2002	72303	0008				Myofacial release/soft tissue mob		
	+	7	0371	02/01/2006	30/12/2005 1	7:12:50	28/12/2005	992963	0010				Pairs, marriage or sex therapy: Pe		
	+	8	9999	31/12/2005	31/12/2005 1	6:19:54	31/12/2005	993321					Per region, e.g. cervical, sacral, l	 	— Record
	+	9	0363	01/06/2002	31/05/2002 2	22:59:15	20/05/2002	72303	0008				Myofacial release/soft tissue mob		
►	+	10	0375	29/06/2002	28/06/2002 1	9:32:36	24/06/2002	72501					Rehabilitation where the pathology	-	
Re	cord	6 II I		7 🕨 🕨	▶ 米 of 1477	7		•					Þ		

Figure 1 : Example of a table showing fields and records

Queries: these are questions asked of the data. "Show me information for only client 0367 (from the table above) or "what clients did I see on 29/4/99?". Again you will not need to use these directly – they are built into the various buttons and whatnot.

Forms: Tables can be rather unfriendly things to enter data to so a form does the job of filling in the table or combination of tables, but by means of a more user-friendly front end that also makes sure you enter all the required information the correct way. Think of a form as you would any paper form.

Reports: A report can be thought of as a document reporting your results. In this case a report would be an account statement for a client(s) or a total account history for a client.

So, all the info is entered to *tables* by filling in a *form*. You ask questions of the data using a *query* and the result of the query can be printed as a *report*.

One thing to remember about using Access is that after you type something in a field to press <Enter> or <Tab> to move out of that record or click the Refresh button. The act of moving out of the record enters the data to that field. Unlike MS Word or Excel you do not have to save anything; when you move out of the record the data is saved.

1.4.1 Navigation in Access

The picture below shows the navigation buttons seen on the forms and explains their functions. Note that record number 15 will not always be record number 15 – it depends on how the records are sorted. For instance, in the list "apple", "banana", "cherry" the word "apple" is the first record, but if you sort the list backwards then "cherry" will be first in the list.





Figure 2 : Navigation buttons on a form

1.4.2 Finding and Filtering

If you wish to find a particular client ID, name, doctor then click in the field of the form you wish to search and then click the "Find" button. Type in the text you are looking for in the "Find what" field and then click "Find first". Be careful to pay attention to the other options in the dialog box if your search is not yielding the results you expected. Wildcards can be used.

Filtering is different from finding in that filtering produces a shortened list that only contains records meeting the criteria you specify. Finding does not shorten the list. To filter for client "0375" in the Treatment Details form then right click in the Client Ref field, type "0375" in the filter criteria box and press <Enter>.

Note that right-click context menus are not available if you do not have the full retail version of Access installed on your computer (i.e. if you only have the Access runtime installation). In this case make use of the normal menu items.



fCli	entDetails															
	Client I	Data	Er	ntry	For	m	Þ	Treat [Details	s 🔽 F	Print	Find	Delete	New	Refi	resh
	ClientRef ClientName Client ID No. MedAid ID ClientMedAid PrincipalMem Doctor ID Hospital Med Aid Auth	No Iber	037 Let 580 A1. Mn	× × × № € € € € € € € € € € € € € € € €	Filter By Filter By Filter FC <u>Remove</u> Cut <u>Copy</u> Paste Sort <u>As</u> Sort <u>De</u> Insert C	cending bect: cluding Selection ccluding Selection control (Sort cending ccending bbject	tion	+al Addre it) Cell il nents printed) sage to inted or ment		osbus 12 retoria 001 / (012) 55	234 55 0099	Cell 0	32 555 8337	A C C C C C C C C C C C C C C C C C C C	ail To Client Both Envelop ctive araged at arale of medits ? ariff Struc © BHF © DID © Pvt	I Aid e V ture
	This sub-form	is not e	ditab	-51			r									
	ClientRef	Client	Nam	E	Propert	les		uidNo	Princ	cipalMe	mber	Re	ferringDoct	or	Active	<u> </u>
	0361	Rosent	berg,	Miche	elle l	DISCOVERY	034462340		Mrs. I	Michelle F	Rosenbe	Brj				
	0362	Hale, J	ennife	er Rub	oy I	DISCOVERY	052313110		Mrs. J	Jennifer F	Ruby Ha	le				_
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	0364	Koevor	t, Alic	sia (L	ee) i	TOPMED	3900001412	2-2	Mr. N	leville Koe	evort					
	0365	Engelb	recht,	, Jan I	Daniel (I	PRIVATE			Mnr. k	Jan Danie	el Engel	br				
Rec	Last update	07-Jan	-2006	11:59 5 🕩		≭ of 21										

Figure 3 : Filtering for a Client ID

1.5 Some Conventions to be Aware OF

. Fields with a red label are mandatory (you have to fill them in)



- Lists with a pink field header indicate that a value below it can be double clicked to bring it up in an editable area.
- The database compacts itself every time it is closed you may notice a few seconds delay when you shut down
- Labels with ellipsis (...) at the end (e.g. MedAid ID...) indicate that the label can be clicked on to activate another form or bring up some other information.



2 USING PUMPKIN PMS

2.1 STARTUP – DEALING WITH THE SECURITY MESSAGES

When the system first starts you may be prompted by security messages. These should be dealt with in the order indicated below:

Microsoft Office Access	
Security Warning: Unsafe expressions are not blocked.	
Do you want to block unsafe expressions? Yes No Help To block unsafe expressions, microger, set to service nack o on accer must be inst	alled. To get the latest version of Jet 4.0, go to
http://windowsuporte.microsoft.com. 'C:\Program Files\Pump in\PumpkinMedicalAccounts.mdb' may not be safe to open computer. Do you wan to open this file? Hide Help << Open in Help Window	if it contains expressions that were intended to harm your
functionality.	Security Warning
The latest Microsoft Jet 4.0 service pack is available from Windows Update.	Opening "C:\Program Files\Pumpkin\PumpkinMedicalAccounts.mdb"
To block unsafe expressions, see the About Microsoft Jet Expression Se available from the link at the bottom of this topic.	rvic
If the service pack is not applied:	This file may not be safe if it contains code that was intended to harm your computer. Do you want to open this file or cancel the operation?

Figure 4 : Dealing with the security messages on startup

Once this has all been dealt with the splash screen (Figure 6) will appear. To prevent these security messages from appearing in the future the macro security levels need to be set to low as illustrated below.





Figure 5 : Setting macro security levels

2.2 **REGISTRATION**

When the application opens you will be confronted with the startup splash screen as below. The disclaimer just tells you not to blame me if things go awry.

PumpkinPMS 7.0 🛛 🖾
Medical Practice Management System
Pumpkin Systems Mark Krug
pumpkin@krugs.co.za
Disclaimer

Figure 6: Splash screen at startup

Click "OK" and the Registration form comes up. All fields should be filled in except the licence number. Email the information to me by clicking on the "Email" button. I will then supply you with a licence number by return mail which you should enter in the space provided and click "Register". You will not be able to get into the application until you have entered the licence number.

Since the application may be used on multiple computers the "Computer Name" field serves to identify which machine the licence applies to e.g. "Desktop at home", "Desktop at work", "My laptop", "John's computer" etc.



Registration Form There is no cost to us would like to know wi purpose. Please fill in me by clicking the bu number. Enter that li and click "Register", 1 have a problem. Fee	sing this application. However I ho is using it, where and for what he red details below and email it to tton. I will then supply you a licence cence number in the space below Give me a call or send an email if you I free to pass on to your colleagues.
Computer Name	My laptop
First Name	Mark
Last Name	Krug
Your city or town	Johannesburg
Email address	krug@intekom.co.za
Practice Type	Podiatry
Licence Seed	997711416
Licence Number	233568141
Email	Register Quit App

Figure 7: Registration form

Once you have registered the form will not come up again. The licence number is related to the individual computer the application is installed on so if you give a copy to someone else they will first need to get a licence number from me. There's nothing sinister in this, I just want to know where the app is traveling to.

Once you have successfully registered you will be faced with the following screen which shows the "Main Menu". The first thing you need to do is set up your personal details (banking details, practice name, telephone, address etc) and also import the NHRPL tariffs to the database (if you use NHRPL rates). Thereafter we will work through the functions of the four tabs on the Main Menu namely Data Input, Statements, Lookup Tables, Tracking and Locum.



Figure 8 : Main menu



2.2.1 Using the Application on Multiple Computers

You may wish to use the application on your desktop at work, laptop at home and if that has a problem maybe your spouses desktop at home too. Since the licence key is tied to a specific machine you will need to get a licence key from me for each machine. Once you have those licence keys you can move freely between computers.

When you use the application on a new computer for the first time the registration screen will come up - fill in the details and email as before. When you receive the licence key make sure that you enter it against the correct machine name.

If you do use the application on multiple computers there are three scenarios:-

- 1. You install PumpkinPMS from the CD (or download) on each machine. In this case you will need to take only one file with you when you move to another machine the data file "PumpkinPMS_data.mdb" and copy it over the existing file at the location C:\Program Files\Pumpkin¹.
- 2. You have installed PumpkinPMS on the other machines you plan to use, but carry the data file PumpkinPMS_data.mdb on a memory stick. In this case you will need to open the front end on the computer you are using and then tell it where to find the data. To do this click Setup>Pumpkin Connect.
- 3. You carry both the front end file (PumpkinPMS.mdb) and the data file (PumpkinPMS_data.mdb) on a memory stick. In this case you open the front end from the memory stick and tell it where to find the data file. To do this click Setup>Pumpkin Connect.

See also Section 2.3.1.1.

¹ If you cannot see the folder C:\Program Files it may be due to your explorer view settings. Go to Windows Explorer and click Tools>Folder options>View and make sure "Show hidden files and folders" is on.



2.3 Setup

Click the "Setup" button on the Main Menu and fill in the forms shown below.

fMyDetails : Form									
Setup Form		₽ *							
Getting the NHRPL tariffs into the database	se								
Step 1: Connect to the NHRPL and Pumpkin data	basesNHRPL Cor	nnect Pumpkin Connect							
Step 2: Select a practice type and tariff edition	My Practice NHRPL Editi	Type Physiotherapy 2006							
Step 3: Import the selected NHRPL tariffs into this	database Import								
Connecting to the archive									
In order to speed up the database the size may be Before you can do that PumpkinPMS needs to kno in the default location C:\Program Files\Pumpkin th Use the connect button to the right	reduced by archiving old treatm w where the archive is located ien this step is not necessary.	nent details. If the archive Connect							
My Bank Details	Logo	Properties							
Bank ABSA	This logo will appear	◯ Stretch							
Branch MENLYN	on your statements etc.	⊙ Zoom							
Branch code 335-645									
Acc. No. 4049 137 632	Logo								
Acc. type Cheque Account									
Are you a VAT vendor? Show ICD10 Summary at top of each statement?									
	My Practice Details								

Figure 9 : Personal details and NHRPL setup

2.3.1 Getting the NHRPL Tariffs into the Database

The NHRPL tariffs come from a database available from the National Council for Medical Schemes (<u>http://www.medicalschemes.com</u>). PumpkinPMS is supplied with no tariffs in its database, but you should import, from the NHRPL database, only those tariffs relevant to your practice type. Here's the scenario: You are either just starting for the first time or it's some time in the future and the NHRPL database is now out of date and you wish to update to the latest price list. There are two choices (i) manually change the rates in the "Edit list of tariffs" form which may be somewhat tedious or (ii) import the latest price list as described below...

- 1. Download the latest price list from the website. Lets assume it's called "NHRPL v2006_06.mdb"
- 2. Save it in C:\Program Files\Pumpkin (you can delete the old one if you wish probably best to keep it though for "just in case".
- 3. Now PumpkinPMS doesn't yet know that there's a new price list in town so you have to show it where to find the new rates.



4. Open PumpkinPMS and go to the Setup form if you're not already there. Connect to the NHRPL database by clicking on the "Connect" button. A file browser will open up. Select the NHRPL database and click Open. PumpkinPMS now knows where the NHRPL database is.

Locate NHRPL o	data File	? 🗙
Look in:	Pumpkin 🔽 🔶 🖻 💣 📰 -	
📁 Recent	PumpkinMedicalAccounter_data.mdb	
Desktop		
My Documents		
My Computer		
My Network Places	File name: NHRPL V2006_06.mdb Image: Comparison of type: Files of type: *.mdb Image: Comparison of type: Comp	Jpen ancel

Figure 10: Connecting to the NHRPL database

- 5. Pick your practice type and the year edition of the tariffs you want to use. Note that some practice types in the NHRPL database do not have any associated tariffs so the year edition may be blank.
- 6. Click the "Import" button to import only those tariffs relevant to you.

Note: When you import new tariffs then the old tariffs with a code length more than 3 characters are deleted. This assumes that NHRPL codes are more than 3 characters in length and any of your own custom codes are 3 characters or less. Before they are deleted, however, they are first copied to a table called tTreatCodes_old just for backup.

2.3.1.1 Connecting to the Pumpkin Database

Under normal circumstances you should not need to do this. Normal circumstances would be when PumpkinPMS is installed in the default location C:\Program Files\Pumpkin. If you have moved the application to some other location then it needs to know where the data is. This situation is described further in Section 2.2.1.

Click on the "Pumpkin Connect" button and browse for the Pumpkin database (a file called PumpkinPMS_data.mdb). Select the file and click "Open". The application now knows where to find the data again.



Locate Pumpkin	n data File	? 🗙
Look in:	🔁 Pumpkin 💌 🔶 🖆 🏢 •	
Pecent Recent Desktop	Louise Data.mdb NHRPL V2006_06.mdb PumpkinPMS_mdb PumpkinPMS_archive.mdb PumpkinPMS_data.mdc	
My Documents		
My Computer		
My Network Places	File name: Image: Calibratic conditions of type: Files of type: PumpkinPMS_data.mdb Image: Calibratic conditions of type: Calibratic conditions of type:	ncel

Figure 11 : Connecting to the Pumpkin database

2.3.2 Banking Details

The banking details will appear at the bottom of every statement.

2.3.3 Logo

The logo, if you have one, will appear on the left hand side; just follow the instructions on the form. Choose the "Create from file" option and browse to find your logo. Note that the logo must be of .bmp format – and keep it small; 150x150 pixels will do fine.

2.3.4 My Practice Details

Click the "My Practice Details" button and fill in those details for your statement headers. If you do choose to have a logo you must leave the left hand side text box blank or else the text will appear on top of the logo.

2.4 DATA INPUT

Before starting it is important to remember that each and every modality has two important dates viz. TreatDate and StmtDate; the former is the date of a particular treatment session or modality and the latter is the date on which the client was invoiced for that session/modality.



Before you actually enter any treatment data for a client you need to fill in forms for the details of their referring doctor (if required), details of their medical aid and personal details. Once this client info is in place you can begin entering their treatment sessions/modalities.



Fill in any new medical aid or referring doctors first; before doing the clients personal details. You only need to enter a doctor or medical aid once and then those details are available for every client who needs them.

2.4.1 Form : Referring Doctor

The field "DoctorID" is a unique identifier for the doctor. If you ever have two Dr B le Roux's then the first one might be BLER01 and the second one BLER02. This form opens on a new, blank record ready for a new entry. Red labels identify fields that must be filled in – the rest can be left blank if you wish. The doctors name must be entered in the format Surname[comma][space]Firstname. The list at the bottom of the form is not editable, it merely provides a quick access list. If you double click on any Doctor ID then that referring practitioner will appear in the editable area above.

fReferringDoctor						
Referring D	octor Data Entry I	Form	₽•	Delete	New	Refresh
Doctor ID Title ReferringDoctor Doctors Pr.No. Postal Address	STEINF Dr Stein, Frank N 01810 PO Box 123 Transylvania 0001 This form is not editable - for refe	Tel Fax E-ma	il [
	Doctor ID ReferringDo	octor			^	
	JWess1 Wessels, Cob	us				
	STEINF Stein, Frank N	l			-	
Record: I	2 • • • • • • • • • • • • 2					

Figure 12 : Referring doctors data entry form

2.4.2 Form : Medical Aid Details

A medical aid only needs to be set up once on this form so if you have 10 clients using Bestmed it only needs to be entered on this form the first time a Bestmed client signs up.

If the client is a private patient then enter "Private" in the MedAid field. If you have no idea as to the clients medical aid status then create a record with "No details" in the MedAid field. It is important not to leave the MedAidID field blank. The full name of the medical aid is what appears in the address on the statement.

If you know that a particular medical aid routinely only pays for, say, 70% of your claim then enter "70" in the relevant field in the form. As a result of the medical aid only paying a percentage some practitioners have expressed the need to mail two statements. One for the full amount to the medical aid (you know they'll only pay 70% anyway) and one for the other 30% directly to the client. Why wait for the medical aid to decline 30% and only then send a statement to the client. In order to make this dual statement happen you must enter



the percentage of NHRPL rate that the medical aid will pay as discussed above <u>AND</u> you must select mail to "Both" on the ClientDetails form.

This form opens on a new, blank record ready for a new entry. Red fields are mandatory.

Double click a medical aid name below the pink label in the list and the form will jump to that medical aid in the editing area.

Please note that the medical aid information supplied has not been verified.

fMedAid										
Medical A	id Data Enti	y Form		₽ •	Delete	New	Refresh			
MedAidID	WORKCOMP									
MedAidFullName	WORKMENS COMP	ENSATION COMMISSION	NER							
ContactName										
Postal Address	P.O.Box 955 Protoria		Tel	(012)319 9111					
	0001		Fax							
% of BHF rate that			E-Mail							
this medical aid	100.0		Website							
haàz	This sub-form not edi	able - for reference only								
	MedAid	MedAidFullName					<u> </u>			
	AAC	ANGLO AMERICAN CO	RPORATIO	DN ME	DICAL AID	SOCIETY				
	AACMED	ANGLO AMERICAN CO	RPORATIO	DN ME	EDICAL SCH	IEME				
	AECI MEDICAL AIC	AECI MEDICAL AID SO	DIETY							
	AFRISURE - QAUL	AFRISURE - QAULSO 1	MEDIESE	SKEM.	A					
	AFROX	AFROX MEDICAL AID S	OCIETY							
	ALLCARE	ALLCARE MEDICAL AID	SCHEME				_			
Record: 🚺 🖣	71 🕨 🕅	•* of 71								

Figure 13 : Medical aid data entry form

2.4.3 Form : Client Details

Use this form to enter the personal details of the client once the medical aid and doctors details are in place. This form opens on a new, blank record ready for a new entry. Red fields are mandatory.

MedAidID and Doctor ID can be selected from the pick list; just click on the down arrow in the box. Once your client has been discharged and all accounts fully paid up then the "Active" box can be clicked off and their statements will no longer be printed every month. If the client is charged at NHRPL rates click the "Charged at scale of benefits" button on. The ClientName must be entered in the format Surname[comma][space]Firstname and the PrincipalMember must be entered in the format Title[space]Firstname[space]Surname. If the principal member is the same as the client then the client should be entered as "Bloggs, Joe" and the principal member as "Mr Joe Bloggs". If the statement is to be mailed to the client then the database uses the principal members name as the addresee. The "Comments" field is for your own information only and does not appear on any statements. Messages for clients can be printed on the statement and the relevant text should be entered in the "Message..." box. There is another utility available when statements are being prepared to send the same message to all a particular medical aids clients; this will be discussed later.

Choose the tariff structure that applies to the client: NHRPL, COID, Private rates, Discovery or whatever other tariff structures you have defined..



The sub-form at the bottom of the form is "dead" in the sense that no data can be changed – it is there for your convenience only so that you can quickly scroll up and down to see your list of clients. Double click on any ClientRef below the pink label to jump to that record in the editable area.

If treatment data for this client has been archived then the tickbox in the lower right will indicate such.

fClientDetails								
Client Data	Entry Fo	rm	[📭 Treat I	Details 🕂 Print I	Find Delete	New Rei	fresh
ClientRef 0 ClientName V Client ID No. 6 MedAid ID M ClientMedAidNo 0 PrincipalMember M Referring Doctor Hospital Med Aid Auth Tariff Structure N	1752 D /orster, Paul 641205 5040 084 MEDSCHEME 1026867 Mnr. Paul Phillipus	.0.B. 05/12/	1964	Postal Addre (client) Tel / Cell Fax E-mail Comments (not printed)	ss Barrettstraat 1234 Queenswood 0186 H (012) 333 4861		Mail To Client Medical Both Envelope Active Charged at scale of benefits ? Show ICD10 Summary	Aid
This sub-form is not edi	litable and is displ	ayed for referen	ice only.	4 14 161	D		Alcined	
0001 Van Zul	Tame Eugene	MedAid Mal COB	169939	MediAidNo 9	Van Zul Eugene	Prof Lindeque	or Active	-
0002 Harthoor	rn, Annemarie	PRIVATE		-	Not specified	Geen		-
0003 Lewis, R	licus	TELEMED	278427	'1	Lewis, Gerhardus	A. Dos Ramos		_
0004 Kleingbia	el, Smartryk	MEDIHELP	189798	15	Winkler, Louise	Geen		
0005 Claasen,	, Nicolaas	DISCOVERY	014577	200	Claassen, Nicolaas Dr.			
D006 Boud Ga Last update 29-Aug- Record: I€ €	ale 2006 21:17 751	MEDIHELP	338450 1	IN	Boud Ivan Harru	Geen		

Figure 14 : Client data entry form

2.4.4 Form : Treatment details

This form opens on a new, blank record ready for a new entry. Red fields are mandatory.

Use the pick lists to select the ClientRef, TreatCode and Modifier. You may enter either the clients reference number or their name – whichever one you use, the other one will automatically be filled in. When you pick a ClientRef the last diagnosis for that client is automatically filled in – pick a new code from the dropdown list as required. The treatment date defaults to the current date, but you may change this as required either by typing it in or using the calendar button. The Description, Base Rate and Factor fields will update automatically with the correct tariff structure depending on the treatment code and modifier selected. You may still type any value you like in these fields. The comments field does not appear on any statements, but may be useful for extra information. Each and every treatment session receives a unique ID number, the Treat ID. The Treat ID is automatically generated. TreatID is a completely unique reference to a particular treatment session and, if deleted, can never be repeated.

The StmtDate is not entered from this form, but appears just for reference and will be dealt with later. If StmtDate is blank it means that the client was <u>never invoiced</u>





for this session/modality.

The default value for Multiplier is 1 if no modifier is selected. Base rate multiplied by the Multiplier gives the Debit for the treatment. Debit is calculated automatically.

If a locum did the work for you then select their name in the locum box – of course you must first have entered the locums details in the locum data entry form (see section 2.6.5).

Some practitioners have expressed the need to know exactly which modalities have been paid for when the medical aid or client pays up. When a payment comes in you will enter the payment as a treatment session using code 1 (Payment by medical aid). The payment may cover a number of modalities and you may wish to indicate which ones were covered. You can do this by following this procedure: you have just entered the medical aid payment as a code 1 so this is the current record. Now, in the "View Client Balance" form double click all the TreatDates that the medical aid has paid for and the date will be inserted in the description field.

Should you wish to you can also indicate a particular modality as paid by ticking off the box to the right of the modifiers.



Figure 15 : Treatment data entry form

2.4.4.1 Entering ICD Codes

PumpkinPMS does not come with ICD codes, but space is provided for you to enter the ones that you use (see Section 2.6.7). Once the codes have been entered into the lookup table then you can use them in Treatment Details as you wish. To use an ICD code in your treatment details click on the **f** icon.



If you click on multiple codes they will all be entered to the "Your current selection" area. Click on the big right arrow to submit them to the treatment details form.

🔎 Diagr	osis Selection
Your cu	irrent selection
G44.2	
Tensior	n-type headache
ICD Lis	t: Click on one or more codes
D32.1	Spinal meninges
G20.4	Parkinson's disease
G44.2	Tension-type headache
G45.9	Transient cerebral ischaemic attack, unspecified
G55.1	Nerve root and plexus compressions in intervertebral disc disorders
G57.0	Lesion of sciatic nerve
G57.3	Lesion of lateral popliteal nerve
G61.0	Guillain-Barré syndrome
G80.9	Cerebral palsy, unspecified
G81.0	Flaccid hemiplegia
G81.1	Spastic hemiplegia
G82.0	Flaccid paraplegia
G82.1	Spastic paraplegia
G82.4	Spastic tetraplegia
G82.5	Tetraplegia, unspecified
J01.9	Acute sinusitis, unspecified 🛛 💌

Figure 16 : Diagnosis (ICD) selection form.

2.4.4.2 Batch Entry of Treatment Details

You may find that you frequently use certain groups of modalities and that it is tedious to enter them all one by one. To ease this burden the user may define a batch of frequently used modalities and submit them all in one go. Setting up of the batch is described in Section 2.6.2. Once the batch has been defined then you make use of it as follows. On the treatment details form :-

. choose a Client Ref

- choose a Diagnosis
- . choose a TreatDate and then...

click on the "Batch" button next to the ClientRef and the screen will change to that illustrated below. Select the batch you wish to use and click Go.

31.1-		×~./			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	والمحمد فالمحسول المراجعة كالم	~~~		Standard Strange
Clien	t		002	🔽 Potgieter, A	nnette 🔽	Select a batch		Go 🖌	Cancel
Diagr	nosis	+ !	G44.2		Tension-t	ype headache			
2	Parts		one 1		.				

Figure 17 : Using the batch entry method for submission of multiple modalities.



2.5 STATEMENTS

Figure 18 below shows the contents of the Statements tab.



Figure 18 : The Statements tab

These next concepts are important to understand. There are 3 "types" of statement:-

- new
- previous
- full history

New statements are, as the name implies, statements containing never before invoiced modalities. "Previous statements" allows you to reproduce a copy of a previously issued statement. "Full history" allows you to print the clients entire history.

Now, how do we know if a client has been invoiced for a particular modality ? When a new statement is run and you're happy that all is correct and you've printed it out then you must click the "Update : Fill in blank stmt date" button. This will insert the statement date for the modalities just invoiced and thus marking them as "invoiced". A blank stmt date against a modality would mean that session had never been invoiced.

2.5.1 Report : New Statements

In normal use a statement run will be printed once or twice a month and you will want to produce statements for active clients for only those sessions for which they have not already been billed. Only active clients are printed because you clearly do not want to print statements for clients who were discharged and signed off 2 years ago. If a client has already been billed for a session then that session will also not appear on the new statements. You can mark a client as inactive even if they still owe you money – perhaps you've written off their debt.

Before doing your statement run first get all your data on treatment sessions up to date. Now click the "Report : New Statements" button and a menu pops up;



SelectionBox		
Client Selection for Printin New Statements	ng of Statements	Messages 📭 🚔
🔲 0067 Ackerman, Mev. M.	SASOLMED	Archived
🔽 0589 🛛 Ahlers, Heinrich Johann	MEDIHELP	
📃 0208 🛛 Alberts, Amanda - Leatitia	BESTMED	Archived
🔲 0210 Alberts, Hendrik Willem	BESTMED	Archived
🔲 0387 Alexander, Retana	DISCOVERY	Archived
🔲 0106 Amorim, Alvaro Mr.	DISCOVERY	Archived
🔽 0726 Ampofo-Anti, Naalamkai	CSIR	
🔲 0160 Anderson, Adrian	DISCOVERY	Archived
Select the clients to print Select all active clients	Select the statement	date to apply —
Select this medical aid >>	29/08/20	06
Deselect all		
Selected records: 157		
Pre	view Now !	
		✓

Figure 19 : Client selection for printing of statements

If you wish to print all active clients then click the button "Select all active clients" and a tick will appear next to the name of every active client. If you wish to print all active clients except 0367 then find his/her name and click the tickbox off. If you wish to print one client only then click "Deselect all" to clear all the tickmarks, find the one client you want and click their tickbox on. If you wish to print clients from one medical aid only then choose the medical aid from the combo box and click the "Select this medical aid >>" button. If you wish to add a message to the statement click on the "Messages" button in the top right corner. Message centre is detailed further in section 2.5.1.1.

Enter the statement date and click "Preview Now !". If you get a blank statement it will be because you have no active clients with new sessions to bill. If all looks in order then print your statements. When you close the preview window a box will pop up reminding you to update the statement date; this will be dealt with in section 2.5.1.2 below.

2.5.1.1 Message Center

Figure 20 below shows the message control center which you can use to add messages to your statements. Type your message in the box and depending on who you wish to send the message to choose one of the three "Go !" buttons.



MessageControl
Message Control Center
Use this dialog box if you wish to send messages to clients or medical aids printed on their statements
Type your message below:
1 Type your message here
Apply this message to
Active clients
One particular medical aid
One particular client Go !
ClientRef StmtDate Message
3 The message is submitted to the database and appears listed here

Figure 20 : Message control center

2.5.1.2 Updating the statement date

When you close the window a reminder will advise you to not forget to update the statement date for the sessions/modalities you have just billed. By doing this you will cause the statement date to be automatically filled in to the table for all the sessions you

have just printed. This is important because it is whether or not this field is blank in the table that determines if a session has been billed to the client or not. Only press this button after you have printed your accounts and are sure that there are no errors.



When you click the update button the window shown in Figure 21 below will open. The same clients that were selected when you printed the statements will still be selected. Check that the statement date is what you want and click "Update Now". If you originally only selected one client to print then that same one client will be selected to update.

I did not make the statement date update at the same time as you print the statements for the simple reason that often when the statements are previewed a mistake is discovered that you wish to correct. The updating of the statement date should therefore only be done when you are happy that there are no mistakes.



SelectionBox							
CI	Client Selection for Printing of Statements 🛛 🛛 📭 📥						
	0361	Rosenberg, Michelle	DISCOVERY				
	0362	Hale, Jennifer Ruby	DISCOVERY				
	0363	Wagenaar, Corlia	PRIVATE				
	0364	Koevort, Alicia (Lee)	TOPMED				
	0365	Engelbrecht, Jan Daniel (Deon)	PRIVATE				
	0366	Fourie, Fiona	MEDIHELP				
	0367	Koch, Heinrich	PRIVATE				
	0368	Mokone, Lucas	CSIR				
	0369	Botha, Abrahamina Wilhelmina (V	CSIR				
	0370	Smith, Marie, Joan	MEDIHELP				
	0371	Serfontein, Nicolaas Francois	DISCOVERY				
	0372	Mehlape, Teresa	DISCOVERY				
	0373	Van Heerden, Johanna Magdaler	DISCOVERY				
s	elect the	clients to print		Select the statement date to apply			
	Select	all active clients					
9	Select thi	s medical aid >>	-	07/01/2006			
II F	D	eselect all					
Sele	Selected records: 5						
				1			
		Up	date Now !				

Figure 21 : Updating the statement date

2.5.1.3 ICD Codes on the Statements

The ICD codes appear on each line of the statement, excluding the text description, and a summary list appears at the top of the statement which includes the text description. If you do not wish for this summary list to appear you can switch it on or off for all clients via the Setup screen or for individual clients via the Client Details screen – I think it's actually illegal anyway to show the ICD10 description. An example of what the statement looks like with the summary list included is shown below with the ICD codes highlighted.



- for	>		Existin	19997-2006 1979- 1979-1979 1979-1979	Physicalian missic finanti missici		-		108.000 9979	rija Stradi Nietkoon Otitic
Å			194	01/1400/71		8181				
Mire Mi Mireatio Mireatio Protoci Critic	erin Wal rikeen 14 key in	iar C27			Client Ref. No. Client Name : Client ID No : Medical Aid : Medical Aid No Principal Memb Med Aid Auth N	: .: er: lo:	(2112) Lafter, Wilatie SCP II SCIDECCIDO RUVARTE HVARTE HVARTE HVARTE MULTIER	0.08.	1.3499/413	85
					Referred By: Pr.No.: Hospital:	008	r, Calue Waxa 200627 Web Crement Mice	és gélek, Proko	fin	
Statement Date : ICD10's on this S	03 3tmt: S7 S7	/07/20 2:Fem 2.00//	06 ur fracture V19.0/Z50.1:Fracture	e of neck of fem	nur, dosed					
Date	Code		Description			Dia	ignosis	Debi	ts	Credits
	Baland	e brou	ght forward							
Thu 13/04/2006	72901	Tre	atment at a nursing h	nome : Relevan	t f	S7:	2	42.3	30	0.00
Thu 13/04/2006	72701	Eva	luation/counselling a	t the first visi		S7:	2	63.4	10	0.00
Thu 13/04/2006	72901	Tre	atment at a nursing h	nome : Relevan	t f	S7:	2.00/W19.0/Z50	.1 42.3	30	0.00
Thu 13/04/2006	72701	EVa	iuation/counselling a	t the first Visi	a sal	S7.	2.00/0019.0/250	.1 63.4	+U 20	0.00
1 nu 13/04/2006	72305	-97 	education of moveme	enue xercises (exu	37.	2.00///19.0/250	42.3		0.00
Sat 15/04/2006	72901	Ire	armentata nursing h	ome : Kelevan Hetion - Helevan	C T	S7.	2	42.3	5U TO	0.00
Sat 15/04/2006	72501	0000	Aner nours-renabl	manon where the	ne patriology requi	1 37. * 97	2 2 00 MA(40 07750	158./	15	0.00

Figure 22 : Example of statement (personal items have been blurred to protect privacy)

2.5.2 Report : Reproduce Previous Statement

Sometimes you will need to reprint a statement that was issued in the past to a client. So long as you know the date on which that statement was produced and the clients reference number just click the button and fill in the dialog box.

2.5.3 Report : Total Account History

You may, in answer to a query from a client, need to give them a complete account history. Click the button and select the clients reference number. If you wish to produce a complete history leave the "All" radio button selected. If you wish to produce a history between certain dates only then click the "Between dates" radio button; fill in the dates and then "Preview Now".

2.5.4 E-Mailing Statements

There are a number of potential ways that this could be done:-

 Exporting the reports (statements) in .snp (snapshot) format. Good quality output, but this requires the user to have the full Access installation and the recipient to have a Snapshot reader (available free at <u>http://www.microsoft.com/downloads/details.aspx?FamilyId=B73DF33F-6D74-423D-</u> 8274-8B7E6313EDFB&displaylang=en). To use this method choose File>Export



when previewing the statements and then attach the resulting file to your email as normal.

- When previewing statements clicking Tools>Office Links will produce an rtf file readable in Word or any other package, but the formatting gets messed up a bit. It's readable, but not pretty. The rtf file can also be attached to an email as normal. Also a feature only available if you have the full retail version of Access installed.
- My recommended solution is to create a pdf. You don't need to buy Adobe Acrobat for this, there are a number of free pdf creation tools available on the web such as PrimoPDF (<u>www.primopdf.com</u>) or PDFCreator (<u>http://sourceforge.net/projects/pdfcreator</u>) or BullZip (<u>http://www.bullzip.com/</u>)

2.6 LOOKUP TABLES

Lookup Tables are all about lists of treatment codes, modifiers, hospitals and locums that are needed to enter data for treatment modalities. If you wish to change any tariffs on the treatment codes, add a new hospital or add a new locum this where you do it. Generally speaking once you're set up and going these items will rarely change – hence they get their own tab.



Figure 23 : The Lookup Tables tab

2.6.1 Form : Edit list of treatment codes

When you click this button the following menu appears:-



Treatment	Codes
Treatm	ent Code Data Entry Form 🛛 📭 Delete New Refresh
TreatCode	72901 Active ✓ Treatment at a purging home : Relevant fee pl
Long Description	Treatment at a nursing nome : Relevant fee plus (to be charged only once per day and not with every hospital visit
	Use long description as a warning ?
Only the "Ad	tive" ticks can be changed on this sub-form
1	Payment by medical aid
2	Payment by client
3	Discount - enter to treatment details as a negative debit e.gR50.00
4	Write off debt owing. Enter to treat details as a negative debit.
72001	🔽 Infra-red, Radiant heat, Wax therapy Hot packs 🗸 🗸 🗸
Record:	

Figure 24 : Treatment code data entry form

This is where the Treatment Details form gets it's information from. The NHRPL data was imported from the NHRPL database when you set the application up in Section 2.3.1. The short description is what appears on the statement and the long description further clarifies the short description, but does not appear on the statements. In addition to the normal BHF codes (72001 etc) you will need to define some custom codes of your own as the need arises. See the sub-form at the bottom of Figure 24 for examples.

From time to time there may be unusual codes that, when you select them in the Treatment Details form, you need prompting about them. If you click the "Use long description as warning" box then when you select that code in the Treatment Details form the long description will pop up as a warning/notice/prompt.

Some practices may not use all the treatment codes in the list. Those which you do not use may be marked as inactive (i.e. not ticked as Active). Inactive codes will not appear in the picklist when entering treatment details. Conversely, only active codes will appear in the picklist – so if you don't see your codes in the picklists it may be because they are not ticked off as "Active". You can use the green tick button and the red cross button to mark all treatment codes as "Active" or "Inactive".

2.6.2 Form : Batch setup of treatment modalities

You may find that you frequently use certain groups of modalities and that it is tedious to enter them all one by one. To ease this burden the user may define a batch of frequently used modalities and submit them all in one go.

Start by giving the batch a meaningful name that you will recognize later and then add the modalities to that batch. Take careful note that each tariff structure has its own rates (Discovery is different from NHRPL) so when you set up a batch that batch must be for a specific tariff structure. You will therefore need to set up one batch for the NHRPL structure and exactly the same one for Discovery.

In terms of giving the batch a meaningful name, therefore, a recommended name would be "Spinal1@NHRPL: 72401, 72303/08, 72310/08, 72501" for the NHRPL tariff structure and "Spinal1@Discovery: 72401, 72303/08, 72310/08, 72501" for the Discovery tariff structure.



"Spinal1" is used in this example because you may have a "Spinal2" for a different batch of modalities. Call it whatever you want, you will just need to be able to recognize the name when you use it later.

See Section 2.4.4 for guidance on how to apply this feature.

Pumpkin Software
Batch Data Entry Form
Use this form to set up a batch of modalities that are used regularly. Once you have set it up you can select the batch number when entering treatment details and all the modalities are submitted together in one go.
BatchID 1
Description Spinal1@NHRPL: 72401, 72303/08, 72310/08, 72501
Tariff NHRPL 🗸
Add treatment codes to the batch
TreatCode 72401 V Modifier(s) V V
Base rate R72.30 Multipliers 1.00 1.00 1.00 1.00
Description Spinal manipulation/mobilisation/immobilisation
Debits R72.30
🕅 TreatCode 72303 💌 Modifier(s) 0008 💌 🔍 🔍
Base rate R85.00 Multipliers 0.50 1.00 1.00 1.00
Description Myofacial release/soft tissue mobilisation
Debits R42.50
Record: I I I I I I I I I Record:

2.6.3 Form : Edit list of treatment code modifiers

The information about the modifiers came from the NHRPL database at setup time (Section 2.3.1). The "Factor", however, is not supplied in the NHRPL database and needs to be inserted by yourself. The default value is 1.00. See examples in the 4 figure below.





🗉 fTreatCodeModifiers 📃 🗖 🔀							
Treatm	ent Code Modifier Form 🛛 📭 Delete 🛛 N	ew Refresh					
Code	0003	1040					
Description	deducted where equipment used is not owned by the practitioner.	ases towned reduction : rate will ir 0003 this rule is					
Factor	0.85						
ModifierID	Description	Factor 🔺					
0001	Appointment not kept	1.00					
0003	15% of the relevant rate to be deducted where equipment used is no	0.85					
0006	1.50						
0008	0.50						
0009	0009 The full fee for the additional condition may be charged						
0010	Only 50% of the fee for the second condition may be charged	0.50 💌					
Record: 📕	2 ▶ ▶1 ▶* of 8						

Figure 25 : Treatment code modifier form

2.6.4 Form : Edit list of hospitals Not much to say here.

Hospi	ital Entry Form 🛛 🕸	Delete	New	Refresh
Hospital ID	:			
Hospital Na	ame: HospitalName, City			
Not editabl	e, for information only			
EM	Eugene Marais, Pretoria			
MM	Meulmed, Pretoria			
DE	Pretoria East Private Hospital			
ZA	Zuid Afrikaans, Pretoria			

Figure 26 : Hospital entry form

2.6.5 Form : Locums

If you use a locum or assistant this is where you add their details into the system. There are three payment choices: percentage, flat rate or hourly rate. In the example below if you click the flat rate radio button then the percentage or hourly rate box will disappear and the flat rate box will appear.



Pumpkin Software

fLocum					
Locum D	ata Entry Form	P +	Delete	New	Refresh
LocumName	Bloggs, Joe				7
Address	40 Milner St Belgravia Kimberley 8301		Paymer Per Flai Hou	nt Method ccentage t rate urly rate	50.0
Tel / Cell			🔽 Activ	/e?	
Record: 🚺 🖪	1 • • • • • • • • • • • • • • • • • • •	1			

Figure 27 : Locum data entry form

You are setting up the default values for a locum in this form. At actual treatment time when a locum does the work for you and you enter this information in the Treatment Details form you can override these default values and choose whatever you like.

2.6.6 Form : Tariffs

Here you enter the rates per treatment code per tariff structure. Each tariff structure is on a separate page. Examples of tariff structures are:-

- NHRPL the National Health Recommended Price List, the one that most practitioners use. This is the one that you can download from the Medical Schemes website.
- Discovery Discovery Health does not, currently, agree with the NHRPL rates and has drawn up it's own rates list. PumpkinPMS does not include the rates in this tariff structure, but you can enter them yourself if you wish.
- Private maybe you charge your own rates for certain, or all, treatment codes. Again, if you use private rates then enter the relevant tariffs yourself.
- COID Workman's Compensation last I heard WorkComp had agreed to go with the NHRPL structures, so you actually don't need a separate COID structure, but if they ever started using their own structure again you could put it in here.

Note that for a particular treatment code to be added to a tariff structure it must, of course already exist in the database.



Tariffs								
Tariff Data	Entry Fo	rm				Delete	e New	Refresh
Tariff Structure	NHRPL							
Comment								
Tariffs	Code	Units	Value Excl.	Value Incl.	Version	Comment		~
	72001 💌	5	R24.10	R21.10	2006.02			
	72005 💌	10	R48.20	R42.30	2006.02			
	72006 💌	15	R72.30	R63.40	2006.02			
	72007 💌	5	R24.10	R21.10	2006.02			
	72103 💌	10	R48.20	R42.30	2006.02			
You can only assign tariffs to codes that	72105 💌	12	R57.90	R50.80	2006.02			
already exist in the	72107 💌	10	R48.20	R42.30	2006.02			
does not yet exist click	72117 💌	0	R0.00	R0.00	2006.02			
here to add it.	72201 💌	5	R24.10	R21.10	2006.02			
Treat Codes	72203 💌	10	R48.20	R42.30	2006.02			
	72205 🗸	5	R24.10	R21.10	2006.02			~
Record: 14 4 2 • • • • • • • • • • • • • • • • •								

Figure 28: Tariff data entry form showing the NHRPL structure

Tariffs									
Tariff Data	Entry F	Forn	n				Pe De	lete New	Refresh
Tariff Structure	Custom								
Comment	This tariff str structure, bu	This tariff structure should not be deleted. You can delete individual items within the structure itself.							
Tariffs	Code		Units	Value Excl.	Value Incl.	Version	Comment		~
	1	~	0	R0.00	R0.00	2006.01			
	2	~	0	R0.00	R0.00	2006.01			
	X 3	~	0	R0.00	R0.00	2006.01			
	1	~	0	R0.00	R0.00	2006.01			
	×	~	0	R0.00	R0.00				
You can only assign tariffs to codes that already exist in the database. If the code does not yet exist click here to add it. Treat Codes		•		of 3					×

Figure 29: Tariff data entry form showing the Custom structure

Figure 29 above shows the Custom tariff structure. The Custom structure contains custom codes i.e. codes you (or I) have made up ourselves – the BHF did not make up these codes. These codes are used for things like payments, discounts, debt write-off or whatever else you care to invent. Although individual codes can be removed from the Custom structure you cannot delete the Custom structure itself – let me rephrase, if you do find a way to delete the Custom structure – don't.

2.6.7 Form : ICD10 Codes

Enter the ICD10 codes that you use in this list.



ICD10 Code	s		
ICD10	Code E	Entry Form 📭 Delete New Refresh	^
ICD10 Code	Z01.01	kihkikihki	
ICD10 Code	Z01.02	kikikihkih kihkf kikih	
ICD10 Code	Z01.03	kjikj ikjijkd ikji	
ICD10 Code			
			~

Figure 30: ICD10 Code data entry form

2.7 TRACKING

This section is used to keep a track of how things are going in your business.



Figure 31 : The Tracking tab

2.7.1 Report : View Chart of Debits and Credits per Month

This report is a simple bar chart showing the value of services rendered and income per month and is a simple visual way of tracking your practices performance. An example is shown below. A pop-up dialog box will ask for the range of dates you wish to include in your chart and whether or not you wish to include archived data.





Figure 32 : Bar chart showing value of services rendered and income per month

2.7.2 Report : Debits and credits per month per treat code

Produces both a text report and a 3D chart showing the value of the work you are doing every month per treatment code. You must select the date range and codes you wish to use.



Pumpkin Software



Figure 33 : 3D Bar Chart showing the value of services rendered per month per treatment code

Value of Services Rendered and Income Received Per Month per Treat Code					
Excludes	archived data.				
TreatCo	de		Services Rendered	Income	
72006	Laser beam				
		May 2006	63.40	0.00	
		January 2008	190.20	0.00	
		February 2008	63.40	0.00	
		Total	317.00	0.00	
72007	Cryotherapy				
		July 2008	46.80	0.00	
		Total	46.80	0.00	
		Grand Total	363.80	0.00	

Figure 34 : Report showing value of services rendered and income received per month per treatment code.



2.7.3 Report : Chart of new clients per month

Produces a bar chart similar to the one above, but shows the number of new clients per month. Also offers an option to include archived data (if there is any).

2.7.4 Report : Outstanding client balances

When you select this option the following menu will appear:-



Figure 35 : Outstanding balances - report options form

Three reports are available form this button:-

- "All clients" : a list of all clients, what they owe, whether they're active or inactive and the date of their last statement (Figure 36) plus some totals.
- "Active clients only" : as above, but for active clients only
- "Medical aid summary with account age" : a summary grouped by medical aid showing the outstanding balances, the account age and contact telephone numbers for the medical aid and the individual (Figure 37). Useful if you're chasing accounts.



Ref	Name	Debits	Credits	Balance	Active	Last Stmt
0361	Rosenberg, Michelle	1,010.04	0.00	1,010.04	Yes	01-Jun-02
0362	Hale, Jennifer Ruby	2,177.53	0.00	2,177.53	Yes	01-Jun-02
0363	Wagenaar, Corlia	3,126.44	1,638.32	1,488.12	No	01-Jun-02
0364	Koevort, Alicia (Lee)	4,308.85	0.00	4,308.85	Yes	01-Jun-02
0365	Engelbrecht, Jan Daniel (De	5,768.55	2,716.64	3,051.91	Yes	29-Jun-02
0366	Fourie, Fiona	2,323.89	0.00	2,323.89	Yes	01-Jun-02
0367	Koch, Heinrich	1,813.84	2,446.56	-632.72	Yes	01-Jun-02
0368	Mokone, Lucas	1,097.04	0.00	1,097.04	Yes	01-Jun-02
0369	Botha, Abrahamina Wilhelm	7,379.97	0.00	7,379.97	Yes	01-Jan-06
0370	Smith, Marie, Joan	3,667.20	483.84	3,183.36	Yes	20-Jun-02
0371	Serfontein, Nicolaas Franco	2,508.50	0.00	2,508.50	Yes	02-Jan-06
0372	Mehlape, Teresa	9,634.40	0.00	9,634.40	Yes	29-Jun-02
0373	Van Heerden, Johanna Mag	3,292.00	0.00	3,292.00	Yes	29-Jun-02
0374	Lotter, Jaco	12,158.80	0.00	12,158.80	Yes	02-Jan-06
0375	Lebelo, Moses	7,580.06	0.00	7,580.06	Yes	02-Jan-06
0376	du Plessis, Andrina Gertuid	1,534.30	0.00	1,534.30	Yes	29-Jun-02
0377	Wehmeyer, Suzanne Marie	2,580.40	560.16	2,020.24	Yes	29-Jun-02
0378	Wehmeyer, An <i>a</i> toli Suante	2,885.40	560.16	2,325.24	Yes	29-Jun-02
0379	Eloff, Elizabeth	2,102.60	0.00	2,102.60	Yes	29-Jun-02
8888	Krug, Jennifer	3,627.20	0.00	3,627.20	Yes	02-Jan-06
9999	Krug, Mark	2,470.00	704.40	1,765.60	Yes	02-Jan-06
	Totals	83,047.01	9,110.08	73,936.93		

Outstanding Balances : All Clients

Unpaid debt 89.0%

Active clients = 20

In active clients = 1

Total clients = 21

Figure 36 : Outstanding balances report

Outstanding Balances

Listed by medical aid for active clients with non-zero balance

Ref	Name			1	Total Debits	Total Credits	Balance
Discover	y Health						R18,622.47
Tel : (011) 88	1 2999 / 0860 44	55 66 op tb i 3 Fax	:				
C361 Med Aid No:	Rosenberg, 134462340	Michelle	Fal • WI/012°	841 3652	1,010.04 Cell 072 125 12	0.00	1,010.04
180 + Daγs 10 10.0 4	150 Days 120 0.00	αγκΟΟΘ 2γκΟ 00.0 00.0	60 Daγs 0.00	30 Days 0.00	Current 0.00	3	months plus
0362 Med Aid No:	Hale, Jenni 052313110	fer Ruby	Гal ⋅ H /0.12\	361-1/29 1	2,177.53	0.00	2,177.53
180+ Days 1478.23	150 Days 120 0.00	, αγκΟ ΟΡ 2γκΟ Ο.ΟΟ Ο.ΟΟ	60 Daγs 0.00	30 Daγs 0.00	Curren1 699.30		months plus
0371 Med Aid No:	Serfontein, 00297 1500	Nicolaas Franc	cois Nati HaΩ18∖	381 6051	2,508.50 W /018 810 50	0.00 0 Cel 082 5547 690	2,508.50
180 + Daγs 2151.70	150 Days 120 0.00	Days 90 Days 0.00 0.00	60 Daγs 0.00	30 Daγs 0.00	Cureu1 356.80	3	months plus
0372 Med Aid No:	Mehlape, T	eresa	Cal - 101 /01/2	841 2091	9,634.40 Cell083.958.42	0.00	9,634.40
180+ Days 9634.40	150 Days 120 0.00	, αγε 90 Daγs 0.00 0.00	60 Daγs 0.00	30 Days 0.00	Curren1 0.00	3	months plus
0373 Med Aid No.:	Van Helerde 040992630	en, Johannia Ma T	agdalena (Føl:Wi(012)	841 3480 0	3,292.00 Cell082 4541 62	0.00	3,292.00
180+ Days 3292.00	150 Days 120 0.00	Days 90 Days 0.00 0.00	60 Daγs 0.00	30 Daγs 0.00	Curren1 0.00	3	months plus
5	Totals				18.622.47	0.00	18.622.47

Figure 37 : Medical aid summary report

2.7.5 Report : Tax Summary

This report provides a simple summary of total value of services rendered and income received for the tax years ending February.



2.8 LOCUM

paid out to the locum.

Locum statements can be accessed from this tab. Locums are understood to include assistants as well. A social worker, for instance, may make use of an assistant during group therapies. When a locum does work for you, you will still enter all the sessions they covered into the Treatment Details form, but remembering to select their name(s) as the covering locum or assistant (section 2.4.4). This information combined with the payment method selected in section 2.6.5 allows statements for the locum to be calculated and printed. You print the statement, attach your cheque to the locum and mail it off. As for the Statements tab you can print new, previous or full history statements. As before remember that after you have printed NEW statements for the locum you must insert the statement date. This tells the application that this session has been



fMainMenu : Form	
Main Menu	Setup About
	Data input Statements Lookup Tables Tracking Locum Utilities Report: New statements Report: Reproduce previous statement Report: Total account history for one locum Update: Fill in blank StmtDate Image: Quit Quit Image: Quit Image: Quit

Figure 38 : The Locum tab

2.9 UTILITIES

In normal use this tab would not be used.

If you are testing the functionality of the database you can put in a whole lot of junk data and then delete it all in preparation for real use by using the first button. This deletes all records in all tables except for Medical Aids and custom Treatment Codes (remember custom treatment codes have 3 characters or less).

When you annually import the new NHRPL tariffs/modifiers into PumpkinPMS all the old "tTreatCodes_old" tariffs/modifiers will called be copied to а table "tTreatCodeModifiers old" before they're cleared out and replaced with the new tariffs. If for some reason you want to revert back to your old codes before the import then use the appropriate buttons on this tab. To see what's in the old tables before restoring them just click on the "View" buttons.



2.9.1 Archiving of Old Data

A special word about archiving. Archiving is done when you feel that the application is slowing down due to the large volume of data. Only treatment details are archived, nothing else. When you create an archive any client whose last statement was more than three whole tax years ago gets all their treatment details archived. Archiving involves moving the data from PumpkinPMS_data.mdb to PumpkinPMS_archive.mdb. In order for this to work the system must first know where the archive is. If it's in the default location (C:\Program Files\Pumpkin) then there is no problem, but if it's somewhere else then you need to tell the system where it is. To do this click Setup>Archive Connect.

You can un-archive old data if you wish (bring the data back) by clicking on the relevant button.



Figure 39: The Utilities tab



3 SUMMARY GUIDE TO GETTING STARTED

- 1. Fill in the registration form and email it to me. Enter the licence number when I send it back to you.
- 2. While you're waiting for a licence key download the latest NHRPL database (if you use these rates).
- 3. Fill in your bank details by using Setup.
- 4. Connect to the NHRPL database by using Setup (skip this step if you've put the NHRPL database in the default location C:\Program Files\Pumpkin).
- 5. Import the NHRPL tariffs for your practice type.
- 6. Fill in your practice details using the Setup>My Practice Details form.
- 7. Get your first batch of treatments in order and identify referring doctors, medical aids, client details, hospitals and any locums involved.
- 8. On the Data Input tab enter any new referring doctors and medical aids if they're not already there.
- 9. On the Lookup Tables tab enter any treatment codes, modifiers, hospitals, ICD10 codes and locums you need (the treatment codes and modifiers will already be there and should not need modification unless you want to charge different rates, the Modifier Factor will need to be changed by yourself see Section 2.6.2). Make sure that the treatment codes you use are marked as active.
- 10. Now fill in the Clients Details on the Data Input tab.
- 11. Once all the above is done you can start with the routine of entering treatment details. It's a bit of a schlep to get started having to enter all the setup data, but thereafter it's easy
- 12. Produce your statements monthly from the Statements tab.
- 13. Pay your locums through the Locums tab.
- 14. Keep a track of how things are going with the Tracking tab.

