Reduce DOUBLE BOOKINGS and NO SHOWS GGM MEDEDI

Billing and Practice Management

CALENDAR & PATIENT INTAKE

TRAINING MANUAL

brought to you by CGN



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Introduction CGM MEDEDI Calendar

The key to a thriving private practice, CGM MEDEDI will have your Practice Manager balancing your practice and telehealth schedules like a pro. Schedule consultations, and send appointment confirmations and reminders with our integrated calendar; your patients will never miss an appointment again!

The CGM MEDEDI Calendar is an additional add-on plugin that can be downloaded free from our CGM MEDEDI portal <u>here</u>.

CGM MEDEDI CPS Calendar has also been integrated with other value-adds like Online Bookings, Patient Onboarding and Video Consults.

Steps to Install:

Step 1.

Open MEDEDI Portal by visiting <u>https://portal.cgmsa.co.za/</u> Step 2. Follow the link to the page updates and then select Product Updates Step 3. Select the button "Plugins" and look for the Calendar Plugin 2.8.0 or higher Step 4.

Select the Calendar Plugin 2.8.0 or higher and click on the download button

Step 5.

Once Downloaded double-click the downloaded plugin that will run the update manager and install the plugin.

First view of the Calendar

Opening MEDEDI after the installation of the latest Calendar Plugin 2.8.0 or higher, you will see a new button on the bottom of your MEDEDI CPS Application screen



Clicking on this new button will open the CGM MEDEDI Calendar screen for you

I 18 ECOMED PRODUCTION MediED (25 v47.5					
Company Company			View Appointment Book		RECOMEDPROD
Conversion	Appoir	ntments		S 🔍 🗇 🗉 🖞	View
View Appointment	0000		Fri, Deo 2		Go to Today
BOOK	All-Day				Day Week Month
Appointment		RECOMED, P	DOCTOR, I	DOCTOR, A	S December 2022
Find an Appointment					27 28 29 30 1 2 3
Refresh Online					4 5 6 7 8 9 10
Appointments					11 12 13 14 15 16 17
Register with RecoMed					18 19 20 21 22 23 24 25 26 27 28 29 30 31
Print Appointments List					1 2 3 4 5 6 7
					Calendars 🔅
	11 00				DOCTOR, A DOCTOR, B DOCTOR, C DOCTOR, C DOCTOR, C DOCTOR, C DOCTOR, C DOCTOR, F DOCTOR, I OOCTOR, I OOCTOR, I OOCTOR, K OOCTOR, M
🔶 Back	12 ⁰⁰				RECOMED, P
Exit	E 🚓	Ⅲ . • T&C's F3 F2 Z			Get help, or call 0861 633 334

The components of the Calendar Screen are as follows:

1.

3.

4.

5.

Navigation



- Create a New Appointment
- 2. Find an Appointment
 - Refresh Online Appointments
 - Register with RecoMed
 - Print Appointment List

Appointment View Area

Appoi	intments 🕥 🔾	- 🖶 EI
0000	Fri, Dec 2	
All-Day		
	DOCTOR, A	-
09 00		
1000		

In this view area you can double click on a time slot to create an appointment for the desired time.

Date Selector

View							
Go to Today							
Day	\sim	N	/eek		Mon	th	
<	D	ecen	nber :	2022		>	
Sun M	/lon 1	Tue V	Ved 1	Γhu	Fri	Sat	
27	28	29	30	1	2	3	
4	5	6	7	8	9	10	
11	12	13	14	15	16	17	
18	19	20	21	22	23	24	
25	26	27	28	29	30	31	
1	2	3	4	5	6	7	

1. Go to Today

Allows you to navigate to todays date from any date that you have selected

- Day / Week or Month View
 Change the View Area of the Calendar to display either Day/Week or Month view
- **3. Month and Year Selector** Allows you to change the date to a different month or year

Calendar Settings

C	Calendars
~	DOCTOR, A
	DOCTOR, B
	DOCTOR, C
	DOCTOR, D
	DOCTOR, E
	DOCTOR, F
	DOCTOR, G
	DOCTOR, H
	DOCTOR, I
	DOCTOR, J
	DOCTOR, K
	DOCTOR, L
	DOCTOR, M
	RECOMED, P

1. Global Calendar Settings

Calendars

Allowing you to change the settings for the entire Calendar like, Timeslots, Default Appointment Duration and Working hours

-



2. Doctor Selection Panel

By clicking on the selection box to the left of the Doctors Name allows you to display or hide the Doctor from the Appointment view area

3. Individual Doctor Settings

Hovering over an existing Doctor name will reveal the settings button for the Doctor specific



This allows you to setup custom working ours for a specific Doctor and also change the colour associated with this Doctor.

Custom working hours S M T W T F S 07:00 07:00 07:00 07:00 08:00 Start 	Ch	oose a C	olor						
Custom working hours S M T W T F S 07:00 07:00 07:00 07:00 08:00 Start Lunch 18:00 18:00 18:00 18:00 13:00 End OK Cancel Choore a Color	D Ch	0058.3	olor	e					
Custom working hours S M T W T F S 07:00 07:00 07:00 07:00 08:00 Start Lunch End OK Cancel									
Custom working hours S M T W T F S 07:00 07:00 07:00 07:00 08:00 Start Lunch 18:00 18:00 18:00 13:00 End							ок	Cancel	
Custom working hours S M T W T F S 07:00 07:00 07:00 07:00 07:00 Start		18:00	18:00	18:00	18:00	18:00	13:00	End	
Custom working hours S M T W T F S 07:00 07:00 07:00 07:00 08:00 Start								Lunch	
Custom working hours		07:00	07:00	07:00	07:00	07:00	08:00	Start	
Custom working hours	S	M	T	W	T	F	S		
	Cust	om workin	g hours						
	-								

Creating a New Appointment

1. Double-click on the desired timeslot in the Calendar view area under the selected Doctor to create the appointment for the patient.

2. The "Create a new Appointment" screen will open

Computinue	Create a new Appointment
Madeal V	Attendees
View Appointment Book	Patient(s) None
Accept Changes	
💢 Discard Changes	Doctor(s) RECOMED, P
	Subject
	Type
	- 44
	Starts 02/12/2022 • 12:00 PM Al day event
	Ends 02/12/2022 • 12:30 PM 30 min
	Send a reminder
	Send online patient registration
	Venue
	Summary
	Notes B I U Dateg II 🔽 B

3. Start by typing in the patient name or surname, this will open a dialog box showing you the possible patients that is already on your Database, if the patient is in the list, simply select it.



4. If the patient is new and you need to add them, click on the "Quick Register" button.



5. This allows you to quickly capture the required data for the patient, Please note that using this method you will need to capture more details later like medical aid details and account information like demographics etc, in order to bill this patient.

6. You can also on the above dialogue box select the "Register New Patient" which will allow you to capture all information for this patient before you create the appointment.

		Patient Informa	tion
CGM Seeaso	Patient Information		
Register <u>N</u> ew Patient		ID Number Surname 8501015505081 STEVENS Full Names	Initials Title
Accept Changes		JOHN	J MR
Discard Changes		01/01/1985	M ENGLISH
Print Blank Registration Forme	Contact Information		
Registration <u>r</u> orms	Residential Address — Postal Address –	Next Of Kin Address	
	1 NOWHERE STREET		
	SOMEWHERE		
	SANDTON		
	2146		
	Home Tel (011) 1234567 Cell 0821112222	Kin Tel No	
	Work Tel Fax	Next Of Kin	
	email johnstevens@abccompany.co.za		
	Other		
	Referring Doctor Details	Employer Details	
	Ref. Doctor	Occupation FREELANCER	
	MP No.	Employer ABC COMPANY	
		Box / Street MAIN ROAD	
		City / Suburb SANDTON	
		Post Code 2146	

7. After clicking on "Accept Changes" you will be moved to the Medical Aid Details screen where you can capture the Medical Aid Details of the customer.

			Medical Aid Det	ails			RECOME	DPROD
CGM	MR JOHN STEVENS							
Register	Medical Aid Membership							
New Patient	Medical Aid Scheme	Membership No.						
Accept Changes	DISCOVERY	1234567890						
<u> </u>	Plan COMPREMENSIVE	Option						
	COMPRETENSIVE	000000						_
	Dependants							_
	Dep No MM D No	OTTO CHO	Surname	10111	Full Names	Title	DOB	M/F
	1 00 1 0501015505081	STEVENS		JOHN		MR	01/01/1905	10
								~
						😔 Check Member Detail:	3	N 2
Back						The checking of details are a	vailable for this	; fund.
						Note: This is a paid for servi	28	
Exit						Get help or c	all 0861 633 33	4 🛞

- 8. Please note that you have the option at this point to also perform a Membercheck for the patients' Medical Aid details on the bottom right of your CGM MEDEDI CPS screen if you have the Member Check plugin.
- 9. After again clicking on "Accept Changes" you will be moved to the final "Account Details" screen where you can complete all account information for the patient.

		Account Details	RECOMEDPROD					
CGM Seator	MR. JOHN STEVENS							
	Account Details							
New Patient	Account No Name Filing Reference VAT Nu	imber						
<u>Accept Changes</u>	STEVENS, J MR Address							
X Discard Changes	Box / Street 1 NOWHERE STREET e-mail ohnstevens@abccompany.co.za]						
Copy Medical Aid Dependants	SOMEWHERE Cell 0821112222 Post Code 7446 Fax 1000000000000000000000000000000000000							
Allergies	Settings							
	Status Normal 💌 Default Charge Rate (DEFAULT 💌 Type 💌 👽 Print Statements Consultation Code Consultation Fee							
	Members							
	LN # ID No Surname 1 8501015505081 STEVENS	Full Names JOHN	Title DOB M/F MR 01/01/1985 M					

10. Assign an account number to the patient's account manually or click on Accept Changes to have MEDEDI CPS automatically assign the next available account number to the patient.

11. After you click "Accept Changes" on the previous screen, CGM MEDEDI CPS will return you to the Calendar "Create a New Appointment" screen where you will now be able to go and select the new patient you created.

				Create a new Appointment
CGM Computeries	Attendees			
View Appointment Book		Patient(s)	None	
			STEVENS, JOHN, J	
Discard Changes		Doctor(s)	STEVENS, JOHN, J 8501015505081	
	Subject			
	Туре			
			Quick Register <u>New Patient</u>	
	Starts	02/12/20	22 • 12:00 PM All day event	

12. You can now complete the remaining Appointment information like Subject, Type, Start and End times, as well as Venue, Summary and any notes you might want to take down for this patient.

Completion		Create a new Appointment
	Attendees	
View Appointment Book	Patient(s) STEVENS, JOHN, J	
Accept Changes		
Discard Changes	Doctor(s) RECOMED, P	
	Subject Annual Physical Appointment	
	Type Doctors Rooms	
	Starts 02/12/2022 12:00 PM All day event	
	Ends 02/12/2022 💌 12:30 PM 30 🗧 min	
	Send a reminder	
	Send online patient registration	
	Venue Rooms	
	Summary Annual Physical Appointment	
	Notes 🗈 👉 B I 🖳 🎴 Arial 🔍 12 💌 B	
	Patients Company has requested Mr Stevens to do his Annual Physical Exar	nination

- 13. After you have completed all information needed click on Accept Changes.
- 14. Viewing the new appointment on the Calendar will show you some useful information.

1200	STEVENS, JOHN, J 12 oo Annual Physical Appointment	0

15. Right Clicking on the appointment you will be able to change the status of the appointment you will also be able to delete, edit, bill, SMS or email the patient, you will also be able to script the patient only and also view Patient, Account or transaction history (NEED REWRITE)



16. Left Clicking on the Appointment allows you to see important information about it and read notes quickly, it will also highlight any outstanding amount the patient owes in red.



17. Reminders can be sent when making an appointment. This can be sent on the day or the day before the appointment.

CGM Canada Canad	Attendees							
View Appointment Book	Patient(s) None							
Accept Changes								
Discard Changes	Doctor(s) None							
	8							
	Subject							
	Туре							
	Starts 25/11/2022 O2:05 PM All day event							
	Ends 25/11/2022 V 02:25 PM 20 min							
	Send a reminder The day before							
	Send online patient registration							

18. SMS can be sent from an appointment slot as well. This applies to sending an email as well



Billing the Patient from the Calendar

Once a patient has arrived and been seen by Doctor, you can select to Bill the patient directly from the Calendar, this allows you to save time and be sure you have selected the correct Patient to Bill.

1. Right Click on the Appointment that has now been completed and selects the option either to Bill Patient or Bill Patient Private.



2. This will bring up the Bill Details Screen with the Patient already selected and allow you to bill the patient by adding Diagnosis, procedures, consultation etc.

					в	ill Details						RECOME	DPROD
CGM Sector	Account	STEVENS, J MR			- 4	iled. Aid DISCOVERY (OMPREHENSIVE CLASS	SIC				1234567890	00
View Appointment Book	Patient	MR JOHN STEVENS		101122224	Def. Dr.	Sender M					DOB	01/01/1985	37 y
	Cho. Rate	DISC*		Bil Date 02/12/2022	Venue	Rooms					Auth		
Materials Used	Diagnoses -												
Procedures													
Performed	Bill Summ	ary	Code	Qty	Pr	ice	Diag	Levy	Disc.	Med, Aid		Pat.Due	
Script / Dispense Acute Medicines	Administre	on ation Fee	0147			315.10		0.00		315	.10		0.00
Script / Dispense Chronic Medicines													
Ana <u>e</u> sthetic Procedure													
Submit Bil													
Siscard Changes													
View Patient <u>H</u> istory													
View / Add Patient Notes													
😪 🍡 🌛 🎯													

- 3. Depending on whether you have selected to Bill the Patient or Bill the Patient Privately you can either Submit the Bill to the Medical Aid or select to Accept the Bill that will make the Patient Liable for the Payment.
- 4. Bill Patient, submitting to the Medical Aid Scheme will allow you to receive a Claim response from them advising the outcome of the claim, you will be able to also receive this Response on your Main Menu in the CGM MEDEDI CPS Notification area.
- 5. Billing the Patient as Private will allow you to complete the bill and make the Patient liable for the Outstanding amount, this will again provide you with a notification on your Main Menu in the CGM MEDEDI CPS Notification area with an entry "Collect Payment from Mr J STEVENS (Acc: 4)"