

Frequently Asked Questions

Medtech Evolution 10.4.5 Build 6206

Frequently Asked Questions – Download and Upgrade Information

Q: What does Include GST checkbox represent in the Print Activity Report and Print Service Analysis Report screens?

A: The **Include GST** checkbox in the Print Activity Report and Print Service Analysis Report screens indicates whether or not to include the GST amount for the services in the report output. If the user has selected the 'Include GST' checkbox, then the GST value will be added in the amount section on the report. Else, it will not be displayed in the amount section on the report.

Q: Is there an option in the Print Activity Report to generate the report based on Service Provider and Income Provider?

A: Yes, selecting the Service Provider or Income Provider radio buttons in the Print Activity Report screen will print the report based on the either of the two selected radio buttons.

If the 'Service Provider' radio button is selected, then the Activity Report will print the report based on the Service Provider for a transaction. If the 'Income Provider' radio button is selected, then the Activity Report will print the report based on the Income Provider for a transaction.

Q: Does the Transfer Amount of the Deposit Supplement Report display in the Transaction Report?

A: Yes, from Medtech Evolution 10.4.5 Build 6206 onwards, the transfer amount of the Deposit Supplement Report will display in the 'Transfer' column in the Transaction Report page.

If a payment is linked to 2 invoices with different providers, then the transfer amount will be displayed for the 2nd Invoice Provider in the Deposit Supplement.

Q: Can I remove Inactive Providers in the Aged Balanced Summary Report?

A: Yes, selecting the **Include Inactive Service Provider** checkbox in Print Aged Balance Summary screen will include the Inactive Service Providers. If **Include Inactive Service Provider** check box is not selected, then the inactive service providers will be removed while printing the Aged Balanced Summary report.

Q: Can I view the total number of services and the total number of invoices count in Transaction Report?

A: Yes, the total number of services and the total number of invoices are now displayed in the Transaction Report in Medtech Evolution from 10.4.5 Build 6206. A new checkbox 'Print Invoice Transactions Only' has been introduced to print only the Invoices available for the selected criteria in the Transaction Report.

Q: How do I generate the report for a certain period recursively?

A: A report can be generated recursively for a specified date range for a Query in the Query Builder i.e. users can now run the query without changing the dates and generate the report. The steps involved in generating the report recursively are described below:

- Recursive checkboxes have been introduced under the Query Builder Condition screen for 'Between', 'From' and 'To'.

- Between drop-down:** When recursive checkboxes are ticked, then the date selected in the 'Value' and 'and' fields will change based on the date when the query is run. When the 'Value' field Recursive checkbox is unticked and 'and' field Recursive checkbox is ticked, then the date selected in the 'Value' field will always remain the same and the date selected in the 'and' field will change based on the date when the is run.

If the 'Value' field Recursive checkbox is ticked and 'and' field Recursive checkbox is unticked, then the date selected in the 'Value' field will change based on the date when the query is run and the date selected in the 'and' field remains the same.
- For the 'To' drop-down:** A 'Recursive' checkbox next to the 'Value' date field has been introduced. When the 'Value' field Recursive checkbox is ticked the date selected in the 'Value' field will change based on the date when the query is run. On ticking the Recursive' checkbox next to the 'Value' field and saving the Query Builder Condition, the query will be saved with dynamic dates, i.e. Current Date. Running the query then will return the report until the date when the query was run.
- For the 'From' drop-down:** A 'Recursive' checkbox next to the 'Value' date field has been introduced. If the 'Value' field Recursive checkbox is ticked, the date selected in the 'Value' field will change based on the date when the query is run. On ticking the 'Recursive' checkbox next to the 'Value' field and saving the Query Builder Condition, the query will be saved with dynamic date. Running the query will return the report from past dates till today

Q: How do I generate or export a Query Builder from the Windows Task Scheduler?

A: The ability to generate a Query Builder from the Windows Task Scheduler has been introduced in Medtech Evolution 10.4.5 Build 6206. The steps involved in generating the report are as follows:

To Export Query Builder reports:

- When a Query is created in the Designer View tab of Query Builder screen and saved with a name and then the query is run, which will populate results in the Datasheet view.
- From the datasheet view, the query can be exported as CSV file to a specified location. If the location is not specified, the output will be saved in the windows temp folder.

Configuring Windows Task Scheduler:

- Click on the task scheduler Library in the Windows Task Scheduler to view the list of Scheduled Tasks.
- Click on the **Create Task** link (on the right pane) to bring up the **Create Task** window. Various tabs will be displayed under the Create task window.

General tab

- Enter the name of the task to be displayed in the Task Scheduler window
- Ensure that the Author field shows <domain name>\Administrator
- Select the option 'Run whether user is logged on or not' to run the task even if the user is not logged on
- Select the checkbox option 'Run with highest privileges'

Trigger tab

This trigger causes the task to run according to a schedule, and the trigger settings allow the user to set the schedule.

1. Click on the New... button to bring up the New Trigger window.
2. Ensure that the option 'On a Schedule' is selected in the Begin the task field.
3. Select an appropriate schedule option from the Settings section and click Ok to create the trigger

Actions tab

1. Click on the New... button to bring up the New Action window.
2. Ensure that the option 'Start a Program' is selected in the Action field
3. In the Settings section, click on the Browse button and navigate to the Tools folder available under Medtech Evolution installed folder → Bin. By default, Medtech Evolution is installed in C:\Program Files\MedtechAUEvolution

NOTE: If you are uncertain where the Medtech Evolution databases are located, please contact your IT technician or service provider who has performed the Medtech Evolution installation and/or upgrade.

4. Select the file QBuilldwe.exe file
5. In the Add arguments field, add A, leave a space and then enter the name of the Query, leave a space and enter the provider code
For E.g. - A Appointment1 DR
If the name of query has any spaces in between then enter the name of query within double quotes
For E.g. - A "Daily Invoices Total for Doctor" DR
6. Clicking 'OK' button will display the file in the Action tab.

The Query Builder result will be saved based on the preferred export configured for the entered provider code. If there is no provider code added in the argument, then the result will be saved to **Report Manager** of the last logged-in staff.

Settings tab

1. Ensure that the options 'Allow task to be run on-demand' and 'Run task as soon as possible after a scheduled start is missed' are selected.
2. Tick the option 'If the task fails, restart every' and select an appropriate time interval from the dropdown list to restart the task if the task fails to run.
3. Ensure that the option 'If the running task does not end when requested, force it to stop' is selected. If this option is selected, the task will be forced to stop if the task does not respond to a request to stop.
4. Click on the **OK** button to create a Task. The **User Account Information** window will be displayed.
5. Enter the **Administrator Password** and then click on the **OK** button.
Highlight the task, right-click and select 'Run' to start the task. Once the task starts, the status will be changed to 'Running'.

The Windows Task Scheduler will run the query based on the configured time and export the result in the specified folder or save the report in the report manager based on the

configured arguments. When the specified query does not have any output then nothing will happen.

Q: Where can I view the address of the Referring Provider?

A: The address of the Provider can be viewed in the 'Address' column in the Patient Register and Patient Referral screen. The address column displays the current address of the Referring Provider.

Q: Can I view the address of the Referred Provider in a patient document?

A: Yes, when the Provider name is selected in the Patient Document screen, the address of the Referred Provider will be displayed.

Q: How do I view the hospital name for a referring provider in Address Book?

A: A textbox **Hospital** has been introduced in the New Address Book in Medtech Evolution 10.4.5 Build 6206 to enter the hospital name for the referring provider.

Q: What does the Messaging Type column represent in the Address Book screen?

A: The Messaging Type column in Address Book screen displays the message type based on HealthLink box or Argus email address.

When an Argus email is configured then the Messaging Type column will display Argus.
 When a Healthlink box is configured then the Messaging Type will display Healthlink.
 When both Argus email and Healthlink box are configured then Both will be displayed.
 When neither Argus email or nor the Healthlink box has been configured then the messaging type column in the address screen will be blank.

Q: How do I change the status of Outbox Documents?

A: Select a single or multiple documents in the Provider Outbox list, then right-click and select the required status (Mark as In-Progress, Mark as Completed, Mark as Authorized, Mark as Sent).

Q: Can I send Non-Medicare items in an invoice through the Tyro Easy-claim process?

A: No, only Medicare items claimed through the Easy claim for private invoice will be sent. When an invoice contains Medicare as well as Non-Medicare items, the claim will be done only for the Medicare item and not for the Non-Medicare item.

When a claim containing all Non-Medicare items is sent, an information message '**At least one Medicare Service must be included in the invoice to process the claim**' will be displayed.

Q: How do I send a SMS to the patient through the Patient and Provider inbox?

A: SMS can be sent through the Patient Inbox as well as Provider Inbox. The various steps involved in sending the SMS through the Patient and Provider inbox are described below:

- Tick the checkbox 'Inbox' under the SMS tab of Staff → Member as well as the Location settings.
- Click the 'Send SMS' button introduced in Patient and Provider inbox which will be enabled only when the 'Inbox' checkbox is ticked configured under the SMS tab of Staff → Member as well as the Location settings.
- Clicking the 'Send SMS' button will open the 'SMS Compose' screen where the SMS will be sent to the patient. When a different patient has been selected and if the SMS button and Mobile number is configured for that patient, then clicking 'Send SMS' button will redirect to SMS Compose screen displaying the selected Patient name as the SMS recipient.

- When the SMS has been composed, the status of the message (sent or received) will be seen in SMS Text Message Service under Manage My Health.

Q: Can I view the payment from Medicare under 'Medicare (EFT)' payment method?

A: Yes, the Medicare payments for a Bulk bill and REPAT displaying under the 'Cheque' payment method in the Banking screen will be now displayed as 'Medicare (EFT)' payment method.

Q: How can I use the merge symbol for Invoiced Services for a Patient?

A:

- Select the merge symbol [**Patient Invoiced Services (FRN_INV_SERV:365)**] for an Outbox Document template or Front-Page template.
- When the merge symbol is selected, the services (that will include all the invoice types) added for the last 365 days will be displayed. The number can be modified to display the Invoiced services for the required date range.
- If the merge symbol is included in an Outbox document or Front-Page template, then invoiced services will be displayed in the Outbox document or Front-Page screen.
- The Invoiced services will be displayed in the below format:
 <<Date of Service>> <<Payment Level Code> <<Invoice Reference No/Assignment No>> <<Service Item Code – Service Short description>>

Q: Can I inactivate the patient when the deceased date is entered?

A: Yes, in the Status field of Name tab under Patient Register screen when 'Deceased' option is selected from the drop-down and the 'Date Deceased' for the patient is entered, a confirmation message '**Deceased Date is entered for the patient. Do you wish to inactivate the patient?**' with a '**Yes**' or '**No**' option will be displayed'.

Clicking '**Yes**' in the confirmation message will inactivate the patient. Clicking '**No**' in the confirmation message will save the changes in the Patient Register without Inactivating the Patient.

Q: Can I view the Health Fund Name and Number details in IMC Invoice Print Invoice Report?

A: Yes, the **Health Fund name, membership number, UPI and Expiry Date** configured under the Patient Register screen → Account tab will be displayed in the IMC Invoice 'Print Invoice' report.

Q: How do I include the notes for the clinical records in the Patient Medical History Report?

A: The steps to include the notes for the clinical records in the Patient Medical History Report is described below:

- 'Include Notes' textbox has been introduced in the Advanced tab of Medical History Report screen.
- When for e.g. 'Print Immunisations', 'Print Classifications', and 'Print Medical Warnings' under the Quick tab will be selected, the selected checkboxes will be populated under the 'Include Notes' textbox section.

The notes will be printed only for the selected checkboxes under 'Include Notes' textbox section.

Q: What are the different screens where I can see the Item Code number in front of the Service Description?

A: The Service Item number will now be displayed in front of the Service Item Description, from Medtech Evolution 10.4.5 Build 6206 onwards, in the below screens:

- New/View/Modify Invoice → Service Item label, Service Combo box, Service Grid Combo
- New/View/Modify IMC Invoice → Service Item label, Service Combo box, Service Grid Combo
- New/View Group Invoice → Service Item label, Service Combo box, Service Grid Combo
- Modify Held Services → Service Grid Combo
- Derived Fee → Service item label
- New/View Quick Bill → Services to Invoice combo box, Services grid
- New Refund → Service grid column in Service level grid
- View IMC Batch → Service grid column in Service level grid
- New/View Location → Default Standard Hours Service (Postal & Accounting Details tab) and Default After Hours Service (Practice Hours)
- New/View Staff → Default Service combo box (Provider tab)
- Default Service Items → Standard Item, Rural Item combo box under MBS, Diagnostic and Pathology group box
- New/View Service Mapping → Select Service Items

Q: How do I get confirmation that my Health Care Card, Seniors Health Card, Pension Card have expired?

A: A confirmation message '**The Concessional Card details entered for this patient is expired. Do you wish to update the Patient Register or proceed with Invoicing?**' has been introduced to assist in the identification of expired cards at the time of Invoicing.

In the patient register the various scenarios that can be applied to process the invoice with respect to the Health Care Card, Seniors Health Card, Pension Card are listed below:

- When the card (Health Care Card, Seniors Health Card, Pension Card) details are not specified and the Expiry date is not specified, then the Invoice will be generated without any confirmation message.
- When the card (Health Care Card, Seniors Health Card, Pension Card) details are specified but the Expiry date is not specified, then the Invoice will be generated without any confirmation message.
- When the card (Health Care Card, Seniors Health Card, Pension Card) details are specified and the Expiry date is also specified (card has not expired yet) then the Invoice will be generated without any confirmation message.
- When the card (Health Care Card, Seniors Health Card, Pension Card) details are specified and the Expiry date is also specified (card has expired) then the Invoice will be generated with a confirmation message.
- If the card (Health Care Card, Seniors Health Card, Pension Card) details are specified and the Expiry date is also specified (card has expired) in the Patient Register screen then the Invoice will be generated with a confirmation message "**The Concessional Card details entered for this patient is expired. Do you wish to update the Patient Register or proceed with Invoicing?**".
- Clicking the Update button will redirect to the Patient Register screen to update the details for the specific card. Clicking the Continue button will redirect to process the invoice without updating the details.

Q: Can I configure separate Invoice and Remittance message for each location?

A: Yes, from Medtech 10.4.5 Build 6206 onwards, Invoice and Remittance message can be configured for each location under the New/View Account Group screen. All the active locations will be displayed in the New/View Account Group screen.

The steps involved in configuring separate invoice and remittance message for each location is described below:

- A grid column has been introduced to display the Invoice Message and Remittance Message for each Location with the Column Code, Location Name, Invoice Message, and Remittance Message. The two fields 'Invoice Message' and 'Remittance Message' have been introduced to save the footer message for each Location.
- Clicking the Invoice Message or Remittance Message text field area, the respective new memo box will be opened where the message will be entered in the text field provided and clicking the OK button will save the message.
- The invoice and remittance messages will be displayed on the Invoice screen based on the messages configured for the Location in accounts group screen grid.

While we appreciate that you may have questions regarding the functionality changes in Evolution after upgrading, we advise you to search our Insight Customer Portal Knowledge Base, Webinars, FAQ's, or refer to our Release Documentation to avoid delays while reaching our helpdesk.

We thank you for your patience and understanding.

If you require more information or assistance, please contact Medtech Support via:

- **Insight:** Register for the Insight Customer Portal and Log a Support Ticket at <https://insight.medtechglobal.com/>
- **Online Chat:** www.medtechglobal.com
- **Email:** supportau@medtechglobal.com
- **Phone:** 1800 148 165 Option 1

Kind Regards,

Medtech Customer Care Team