User Guide
Medtech32

ACC eSchedule
(July 2016)

These release notes contain important information for Medtech32 users involved with ACC claiming. Please ensure that they are circulated amongst all relevant staff. We suggest that they are filed safely for future reference.

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Intended Audience

This document is targeted towards healthcare professionals involved with claiming for Accident Compensation Corporation (ACC) services, such as GPs, Nurses, Physiotherapists and Practice Managers, etc. This User Guide highlights the process of a new ACC claiming solution known as **ACC eSchedule** within Medtech32.

ACC eSchedule Functionality

Introduction

Currently ACC Invoice claims are being generated based on providers in the practice. This involves sending multiple claims to ACC based on providers and not the billing account for their organisation.

The claim files are sent via HealthLink's Electronic Data Capture (EDC) service. EDC can only accept one ACC Identifier (ACC Provider Number) per schedule/claim.

This User Guide highlights the **ACC eSchedule** solution, which has been developed in conjunction with ACC.

This new claiming solution will enable the generation of invoices based on the practice or organisation rather than the providers. This will provide a more flexible solution when submitting ACC 'invoice' claims, allowing multiple payees and contracts to be differentiated within a healthcare facility with the aim of streamline funding with ACC.

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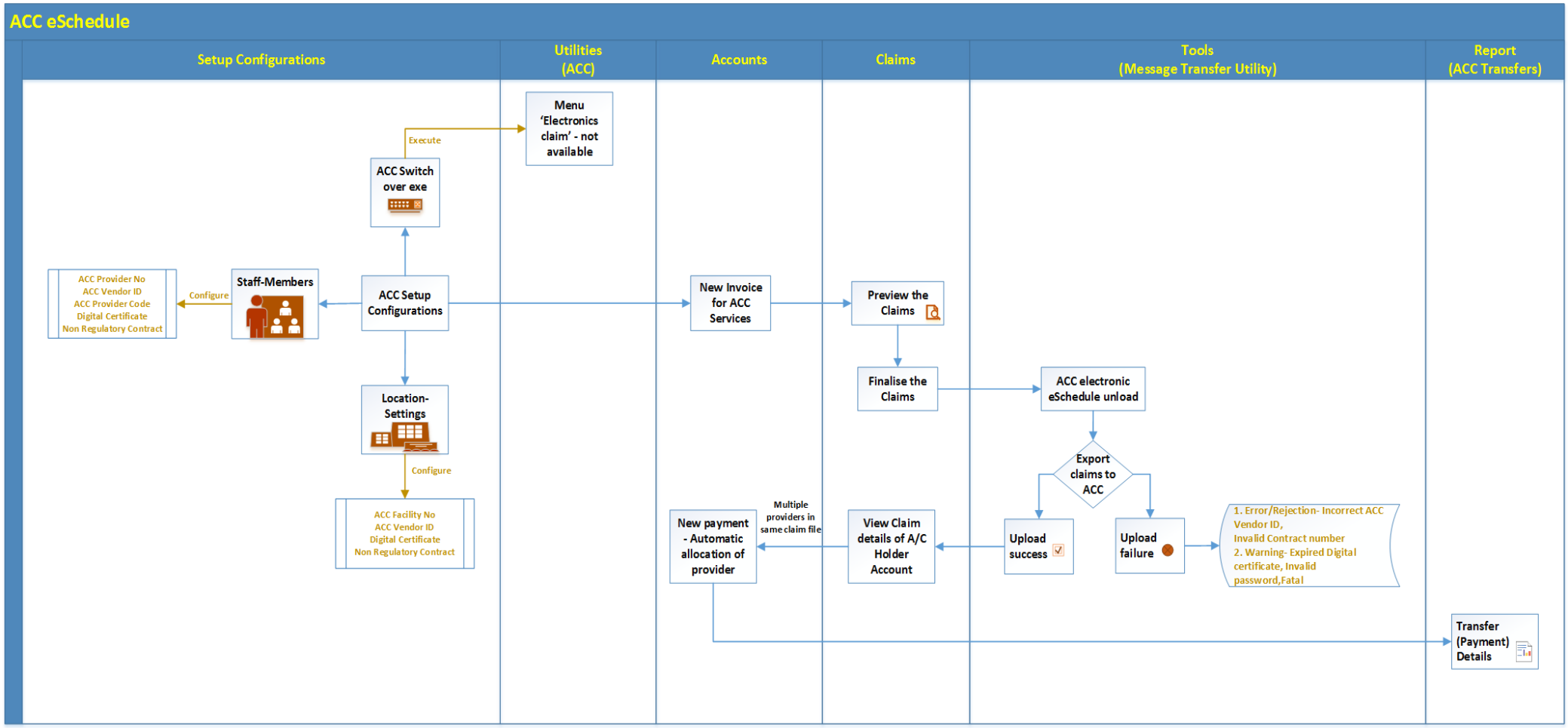
Workflow diagram



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ACC Setup Configurations

During the ACC eSchedule rollout, ACC will provide:

- The Digital Certificates via HealthLink
- Non-Regulatory Contract Numbers based on the contract your practice or staff has with ACC
- The correct ACC Vendor IDs for each Location (if there are multiple) at the practice
- The correct ACC Vendor IDs for individual staff at the practice (if they get paid for the ACC services directly)
- The ACC Facility No for the Location

There are three possible scenarios based on which the practice may receive the above information:

Scenario 1:
Some practices will only receive ACC Vendor IDs for individual staff. In such cases, configure the 'Staff Setup' and proceed with the ACC eSchedule functionality activation.

Scenario 2:
Some practices will receive an ACC Vendor ID for the whole organisation or each location within the organisation will receive different ACC Vendor IDs. In such cases, configure the 'Location Setup' and proceed with the ACC eSchedule functionality activation.

Scenario 3:
Some practices may receive both ACC Vendor IDs at the Staff and Location levels. In such cases, configure both the 'Staff Setup' and 'Location Setup' and proceed with the ACC eSchedule functionality activation.

The following steps explain how to configure the Staff and Location Setup screens.

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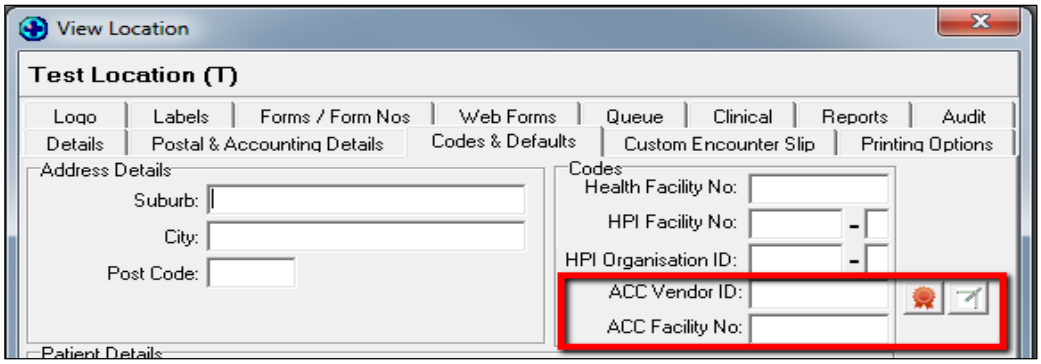
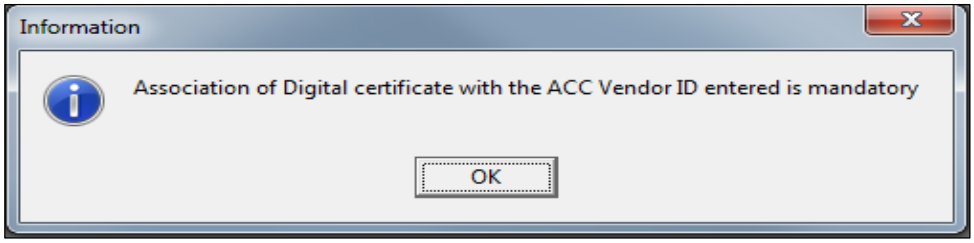
Location Setup Screen

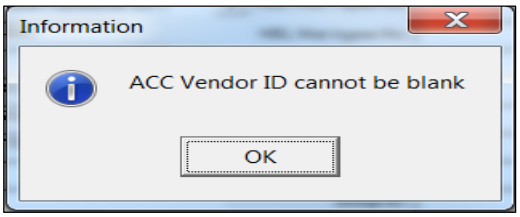
- Navigate to **Setup ► Location ► Location Settings ► Codes & Defaults** tab
- Enter the ACC Facility No provided
- Enter the ACC Vendor ID provided



- Each ACC Vendor ID must be associated with a unique Digital Certificate.
- If an ACC Vendor ID is entered without associating the Digital Certificate, then clicking the '**OK**' button will generate the following message:



- If the user tries to associate a Digital Certificate or enter a Non-Regulatory Contract number in the Contract screen without entering an ACC Vendor ID in the 'ACC Vendor ID' field, the following message will be displayed:



- After entering the ACC Vendor ID, click on the Digital Certificate icon to associate a Digital Certificate to the ACC Vendor ID provided for the Location. A Digital Certificate pop up screen will appear. Click the '**Browse**' button and select the associated Digital Certificate to be used for ACC eSchedule. Add the correct Pass Phrase for the certificate.

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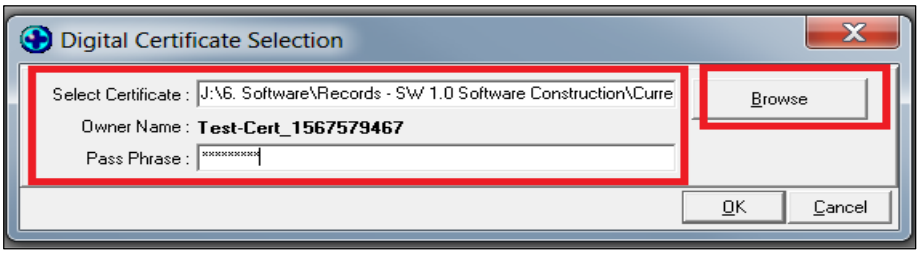
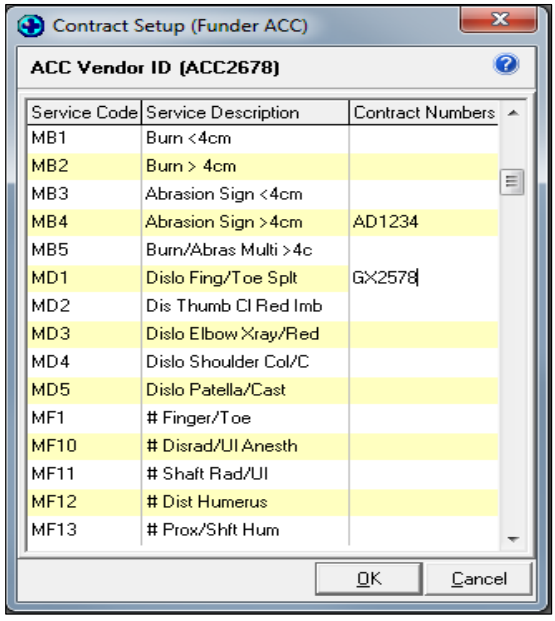


To associate Non-Regulatory Contracts for ACC services:

- Enter the ACC Vendor ID and click on the Contract Setup icon . The Contract Setup screen will display all ACC Services where the respective Non-Regulatory Contract numbers can be manually entered against each relevant service.



To associate Regulatory Contracts for ACC services:

- The system will read the ACC Provider Code configured under Staff Setup, which must be correctly assigned depending on the services performed by the provider.
- The Regulatory Contract numbers are derived based on the Income Provider who is invoicing for ACC services.
- The ACC Provider Code available under **Setup ► Staff ► Members ►Provider** tab will be used for associating Regulatory Contract numbers for each Income Provider who will claim for ACC services.

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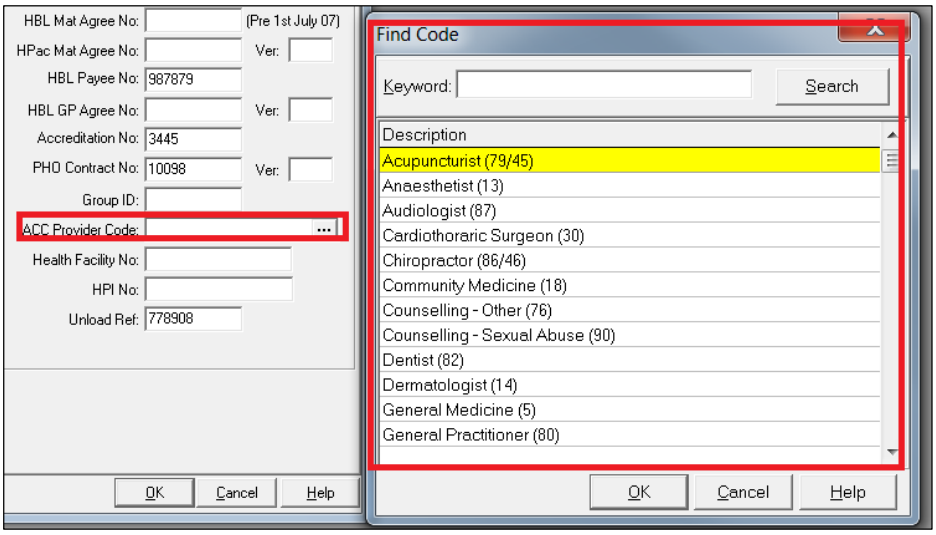
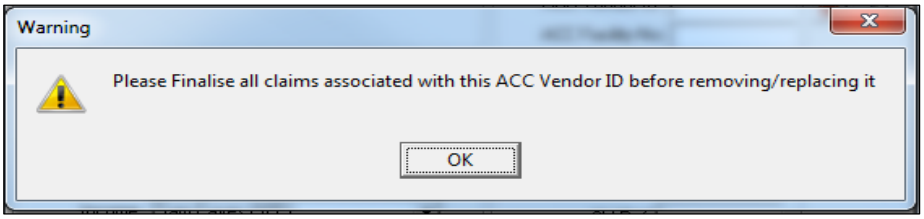


NOTE:

- The ACC Vendor ID must be entered under each Location Setup for systems with multiple locations.
- If the ACC Vendor ID is being deleted or replaced with a new ACC Vendor ID in the Location Setup or Staff Setup screens, then a warning pop up message will be displayed to highlight that claims should be finalised before making the change.



- If a staff member is assigned an ACC Vendor ID, then this will take precedence over the ACC Vendor ID at the Location level for all ACC services performed by the staff member when the ACC claim is being generated during invoicing.

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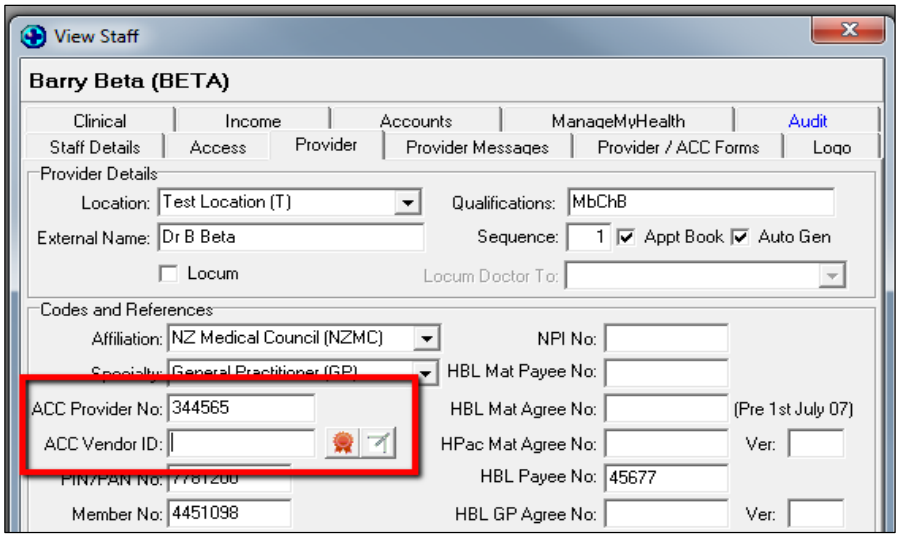
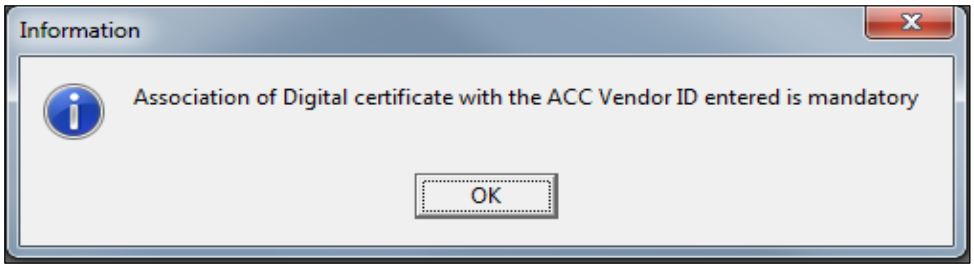
Staff Setup Screen

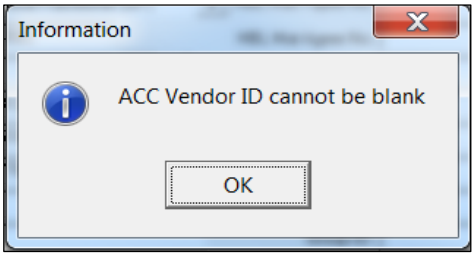
- Navigate to **Setup ► Staff ► Members ► Provider** tab
- Enter an ACC Provider No
- Enter the ACC Vendor ID provided to the staff member



- Each ACC Vendor ID must be associated with a unique Digital Certificate.
- If an ACC Vendor ID is entered without associating the Digital Certificate, then clicking the '**OK**' button will generate the following message:



- If the user tries to associate a Digital Certificate or enter a Non-Regulatory Contract number in the Contract screen without entering an ACC Vendor ID in the 'ACC Vendor ID' field, the following message will be displayed:



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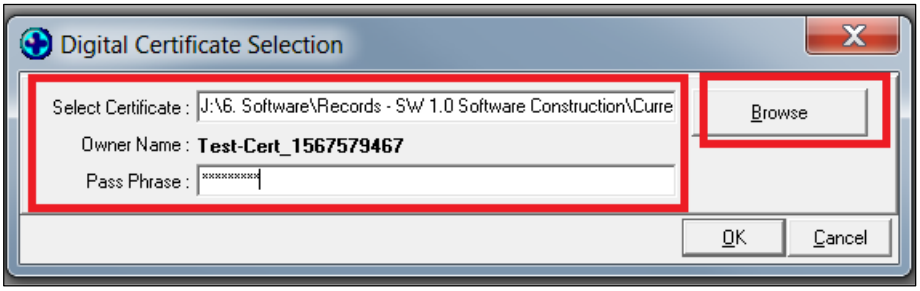
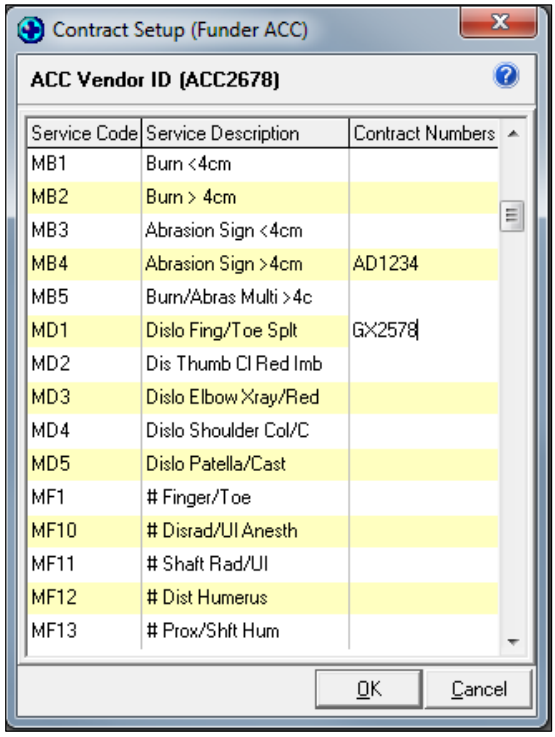
- After entering the ACC Vendor ID, click on the Digital Certificate icon to associate a Digital Certificate to the ACC Vendor ID provided for the staff member. A Digital Certificate pop up screen will appear. Click the '**Browse**' button and select the associated Digital Certificate to be used for ACC eSchedule. Add the correct Pass Phrase for the certificate.



To associate Non-Regulatory Contracts for ACC services:

- Enter the ACC Vendor ID and click on the Contract Setup icon . The Contract Setup screen will display all ACC Services and you can manually enter the respective Non-Regulatory Contract numbers against each service.



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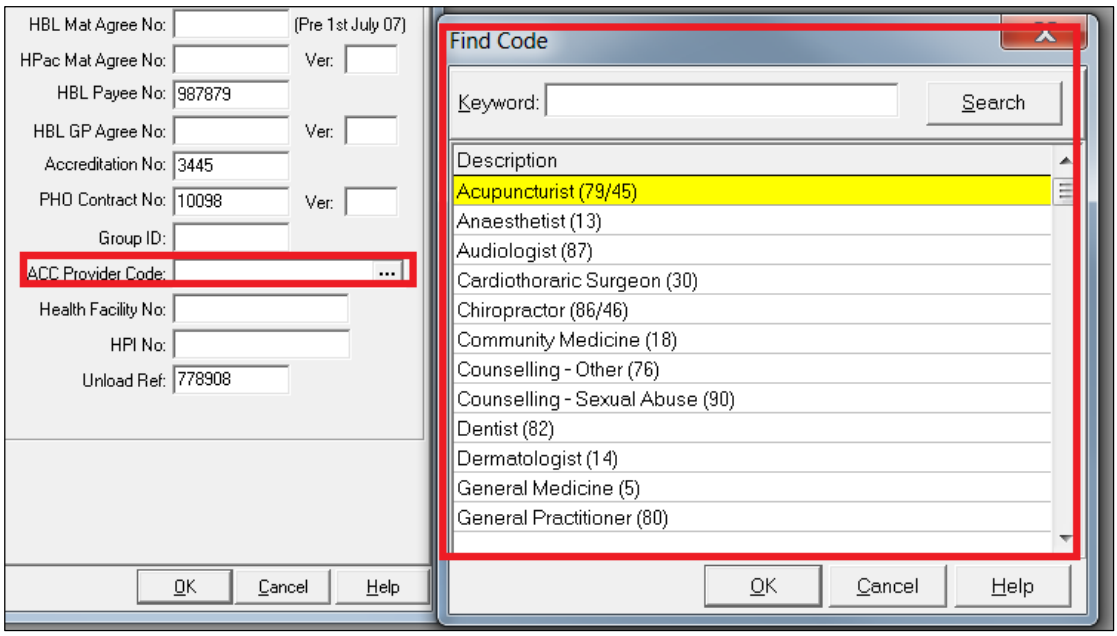
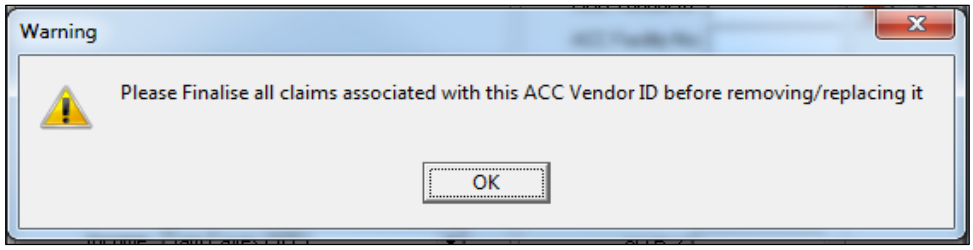
To associate Regulatory Contracts for ACC services:

- Click on the ACC Provider Code search button. Select a provider type along with the code. This ACC Provider Code will be associated when invoice is done for the ACC services.



NOTE:

- If multiple staff at the practice have contracts with ACC, then enter the ACC Vendor ID under each staff member's Setup screen and follow the same steps.
- When an ACC claim is generated, Non-Regulatory Contract numbers take precedence.
- If the ACC Vendor ID is being deleted or replaced with a new ACC Vendor ID in the Staff Setup screens, then a warning pop up message will be displayed to highlight that claims should be finalised before making the change.



ACC eSchedule Switchover Exe

Once the ACC eSchedule setup is completed, execute the ACC eSchedule Switchover exe that ACC has provided to your practice. You can copy and paste the ACC eSchedule Switchover exe into any location to execute it.

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ACC Main Application

This section describes how invoices are created for ACC services and how the corresponding claims are finalised and uploaded through the ACC eGateway.

Functions Involved:

1. Electronics Claim menu – Utilities
2. Invoice Creation
3. Claims – Preview and Finalise
4. Automated Setting up of ACC Account for a Vendor ID
5. Uploading the Claims through Message Transfer
6. Display of Status of Claims sent to ACC
7. Payment Allocation for Claims for Multiple Providers
8. Report Generation for ACC Transfers on New Payment Allocation

Electronic Claims menu – Utilities

- Once the ACC eSchedule Switchover exe has run, navigate to **Utilities ► ACC**
- The Electronic Claims menu should not appear.

Invoice Creation

- An Invoice needs to be created for two patients with two different providers. These providers must be of provider type 'General Practitioner' (configured under Staff Setup).
- Navigate to **Patient ► Search;** the Search Patient screen will appear.
- Enter name of the patient and click the '**Search**' button.
- The patient(s) will be listed in the result grid.
- Select the patient and make the patient available on the palette.
- Navigate to **Module ► Accounts ► New Invoice** or use the F9 key.
- The 'New Invoice' screen will appear; select the Income Provider from the Provider and Income drop down menus.
- Select an ACC service in the Services section and associate it to an accident as shown below:

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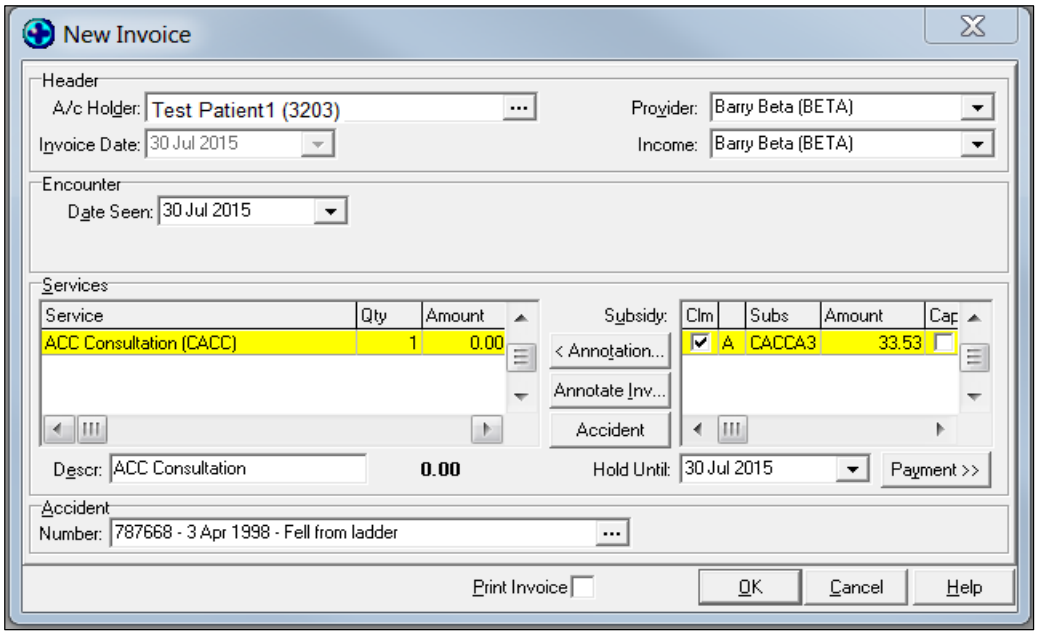
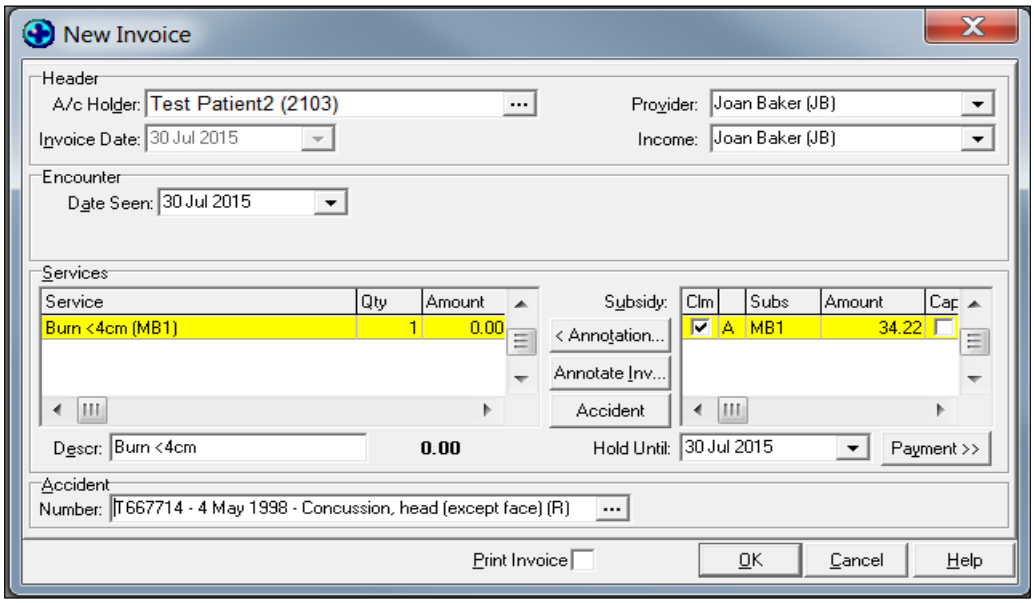


- Click the '**Annotate Invoice**' button.
- The 'Invoice Annotation' screen will pop up and will update to automatically include the ACC32 number associated with the accident against which the Invoice is being raised.
- Click the '**OK**' button and save the changes. The invoice will be created.
- The ACC Provider Code available under **Setup ► Staff ► Provider** tab will be used for associating Regulatory Contract numbers for the selected Income Provider claiming for ACC Services.
- Similarly, create an invoice for another patient with a different provider and associate an ACC service with an accident. Click '**OK**' to save the changes as shown below:



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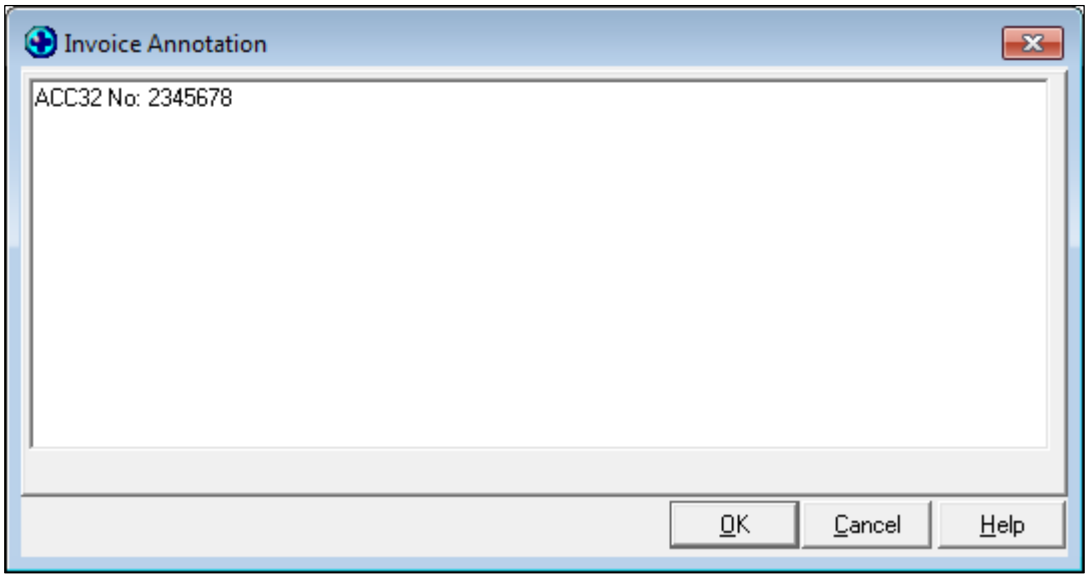
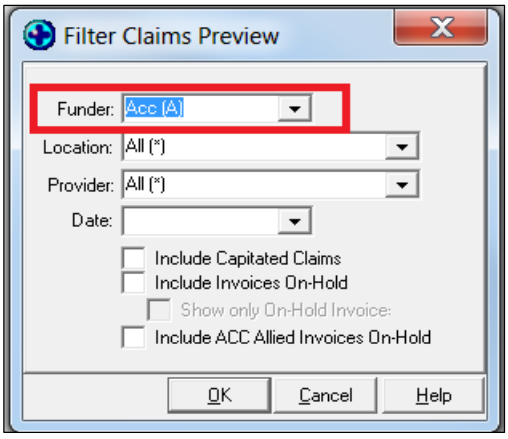
NOTE:

- The ACC32 number (purchase order number) can also be entered manually in the 'Invoice Annotation' screen.
- When entering an ACC32 number manually, it must be preceded with the words "ACC32 No" as shown below. This will enable ACC to easily identify the ACC32 number in the claim file sent to them.



Claims – Preview and Finalise

- Navigate to Module ► Claims ► Preview. The Filter Claims Preview screen will appear.



- Select the Funder as ACC and click the '**OK**' button. The Claims Preview screen will appear with the list of claims.

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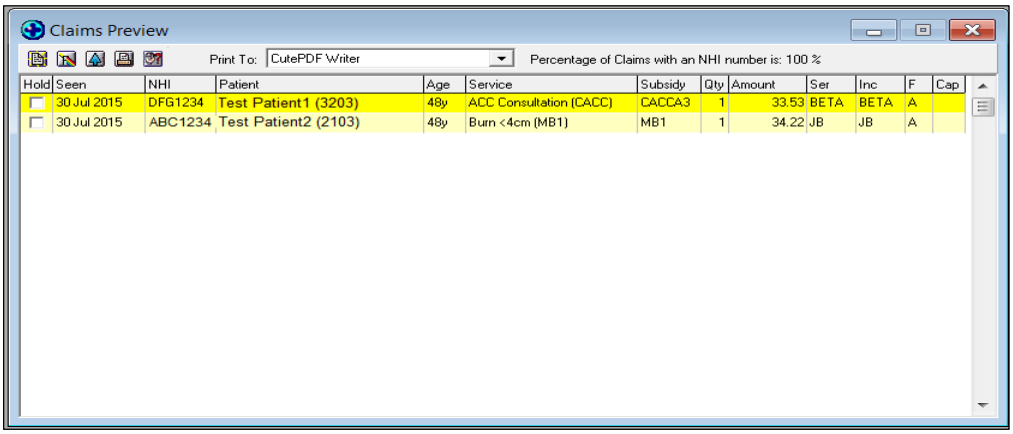
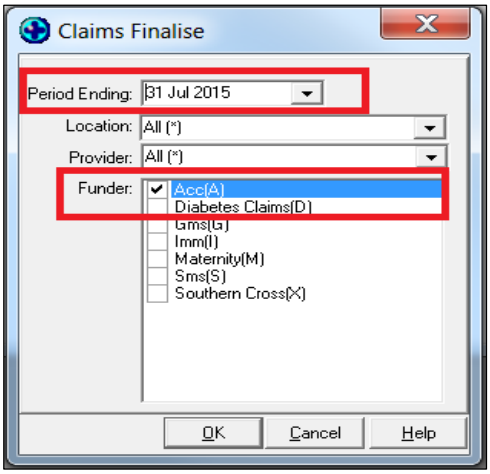
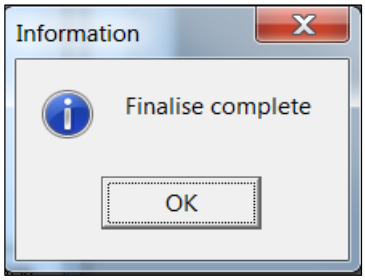


- Navigate to **Module ► Claims ► Finalise**.
- The Claims Finalise screen will appear.
- Filter the ACC Funder for the required 'Period Ending' and click '**OK**' to finalise the claims.



- Either single or multiple claims available for the specified condition will be finalised.
- Once the claims are finalised, the following information message will be displayed:



- The Claims Preview screen will appear blank, after the claims are finalised.

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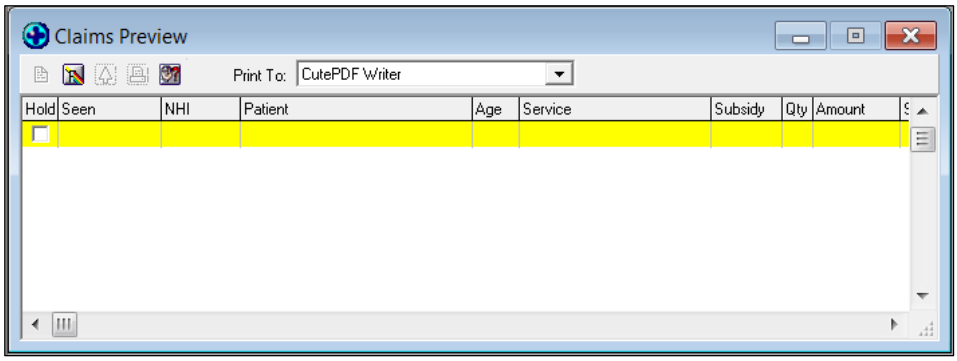
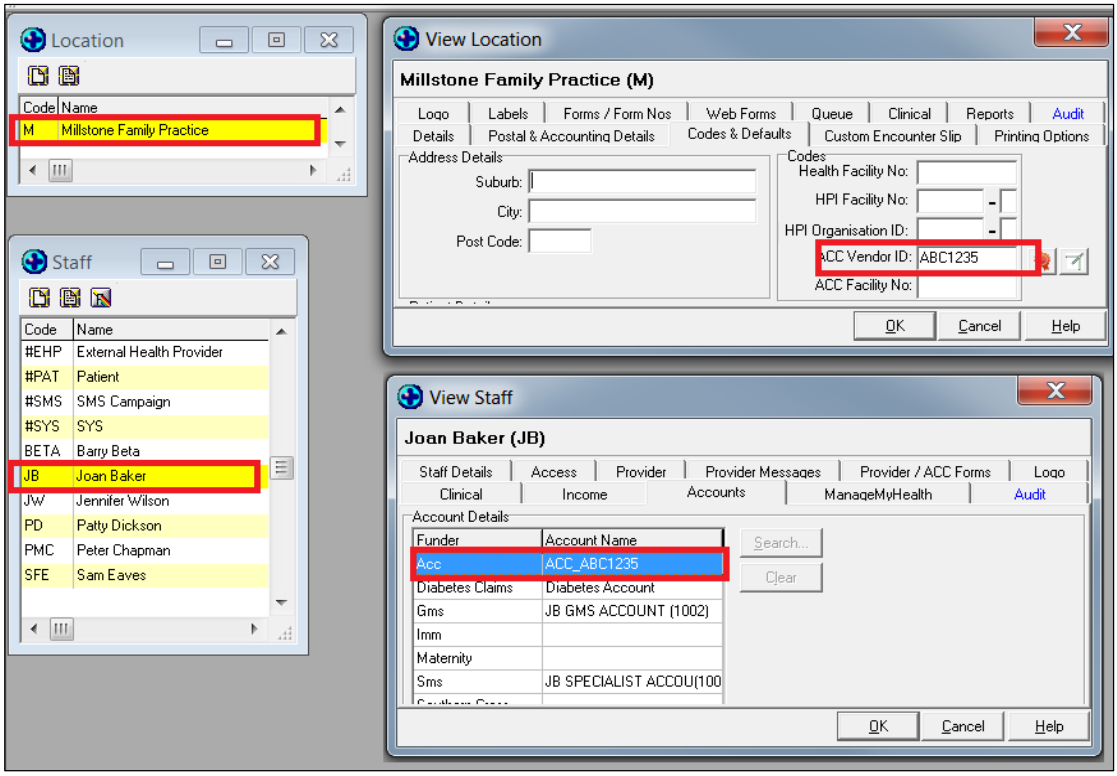


Automated Setting up of ACC Account for a Vendor ID

- An ACC Account will be created automatically for each ACC Vendor ID entered in Medtech32 (at the Location and Staff levels).
- If the ACC Vendor ID is entered under Location Setup, an ACC account will be created automatically for all the staff associated with the Location and added into **Setup ► Staff ► View Staff ► Accounts** tab.



- The ACC account created cannot be removed or modified.
- The ACC Account will be available as part of the patient list.
- Search for this account in the Patient Search screen and make it available on the palette.

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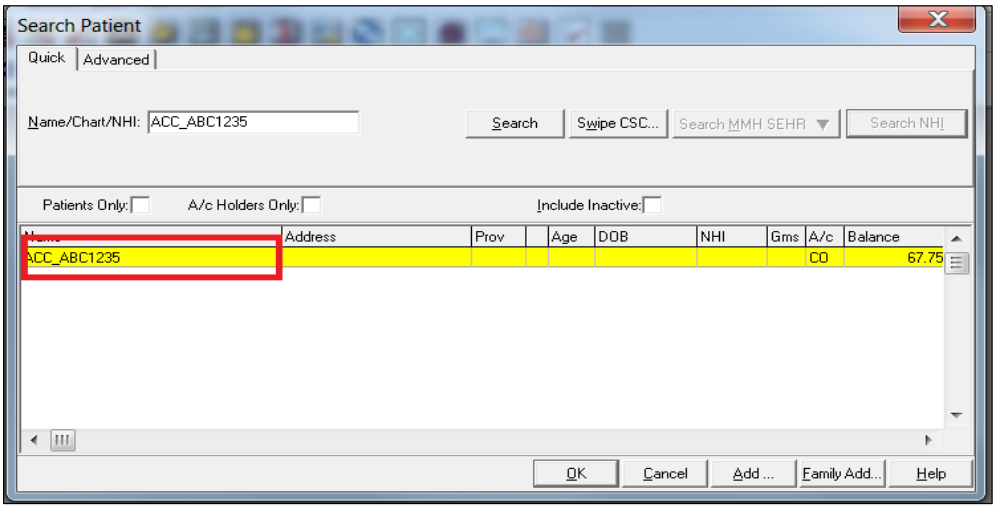
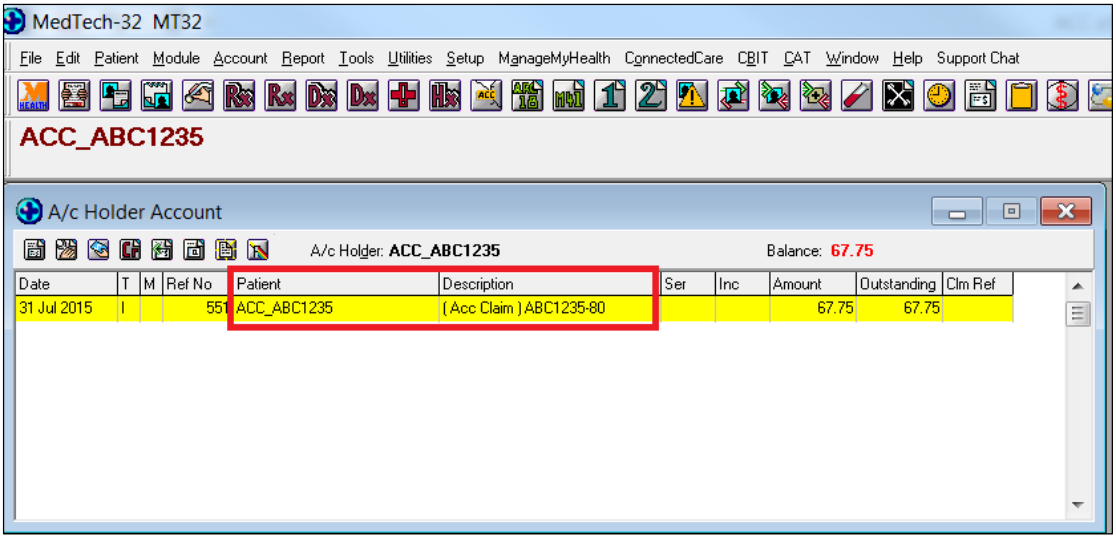


- Navigate to **Module ► Accounts ► A/c Holder Account** or enter **Shift +F9** key.
- The A/c Holder Account screen will appear with the claim grouped under this ACC account.



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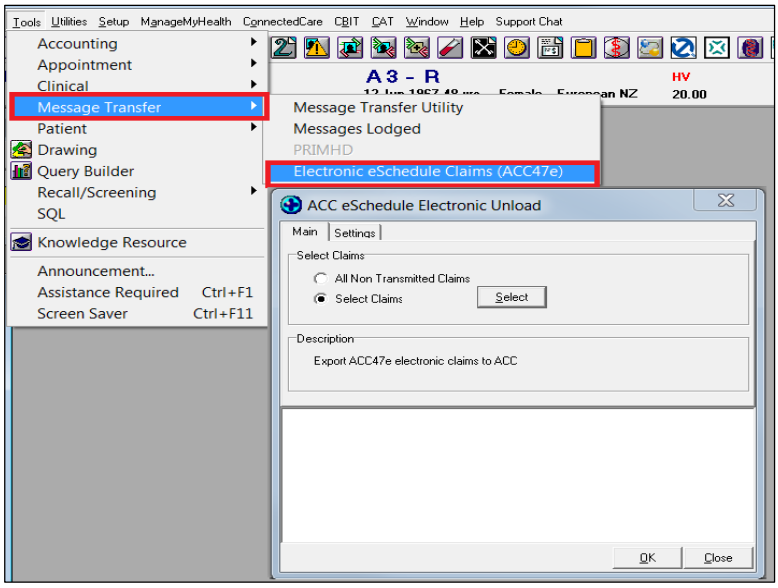
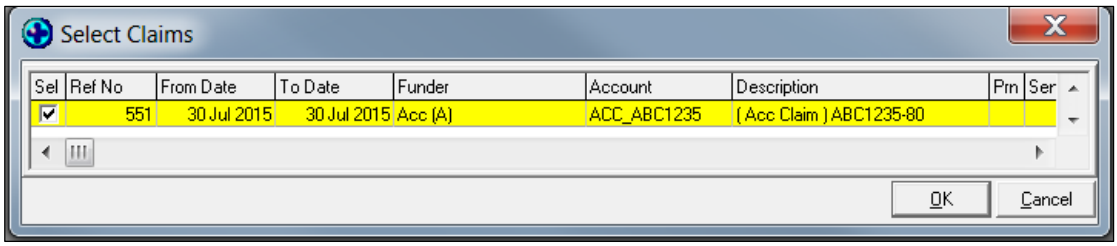
Uploading the Claims through Message Transfer

- The finalised claims can now be transferred through the ACC eGateway.
- Navigate to **Tools ► Message Transfer ► Electronic eSchedule Claims (ACC47e)**.
- The 'ACC eSchedule Electronic Unload' screen will appear as shown below:



- Click on the '**Select Claims**' radio button and then click the '**Select**' button.
- The 'Select Claims' screen will appear with a list of finalised claims.
- The two claims that are finalised will be grouped under the ACC Vendor ID and Contract number combination and displayed as shown below:



- Select the claim and click the '**OK**' button. The selection will be made and the 'Select Claims' screen will close.
- Again, click the '**OK**' button in the 'ACC eSchedule Electronic Unload' screen to start the file transfer process for the selected claims.
- If the ACC eGateway is down while the claim files are processed, the following warning prompt will be displayed.

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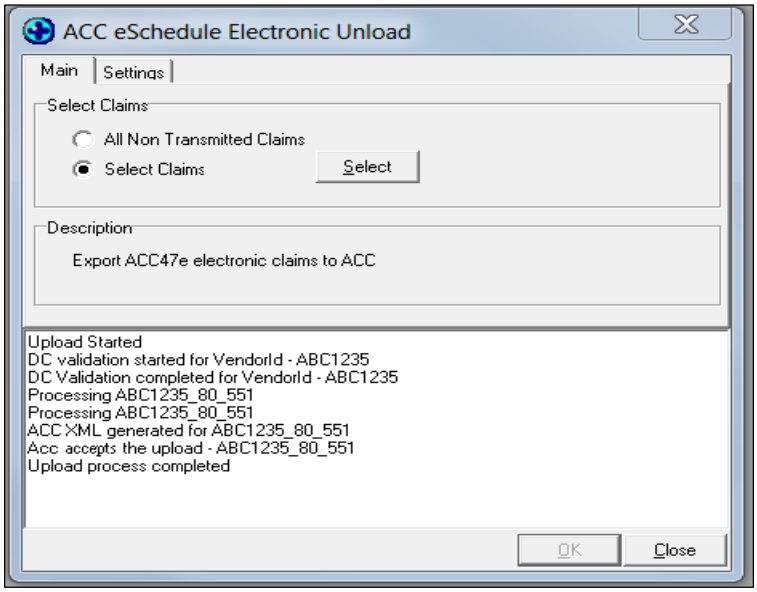
- Once the claims are successfully sent to the ACC eGateway, the process will indicate it has been completed (see below):

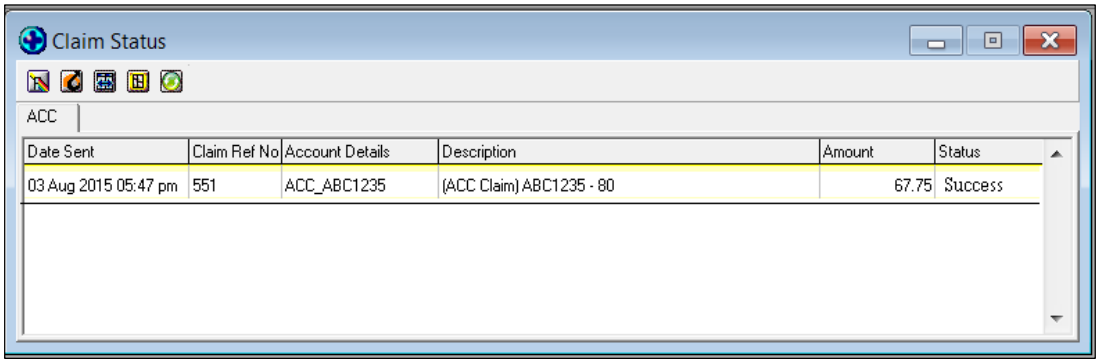


NOTE: While processing the claims:

  - If the Digital Certificate is not valid or has expired, the validation will fail and the appropriate error message will appear.
  - If ACC rejects the claims, a rejected status will be displayed.

Display of Status of Claims sent to ACC

- The status of claims uploaded to ACC can be viewed in the 'Claim Status' screen.
- Navigate to **Module ► Claims ► Claims Status.**
- The 'Claim Status' screen will appear as shown below. The response message from the ACC eGateway states if uploading of the claims was Successful or Rejected. This will be displayed in the **Status** column.



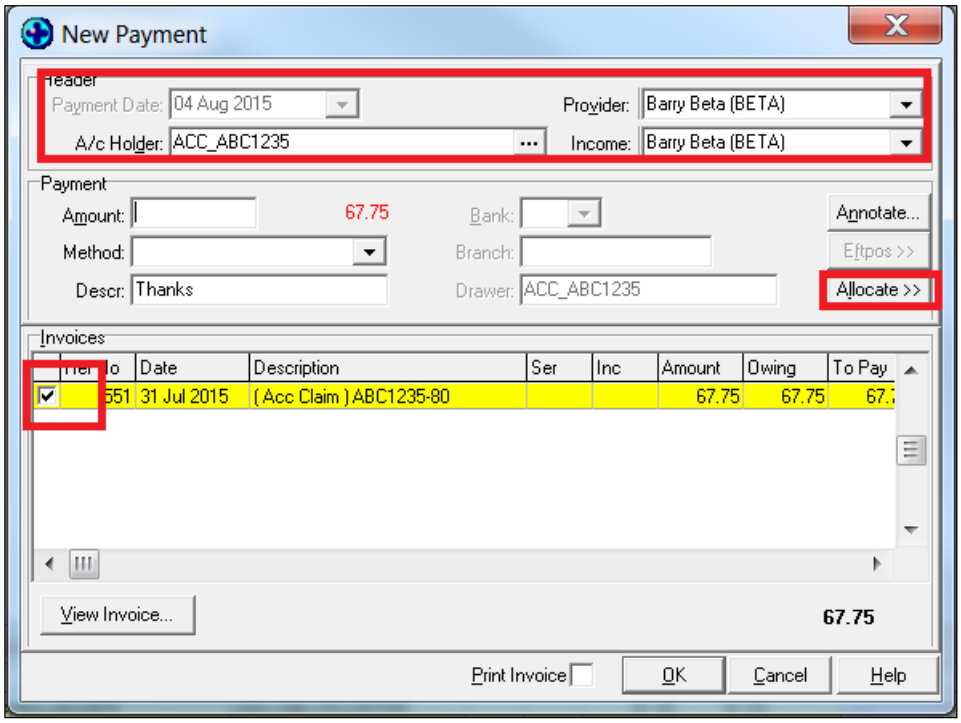
- If a claims submission is rejected, clicking the 'Auto Preview Error Details' icon will provide the reasons for rejection, which must be corrected before resubmitting.

Payment Allocation for Claims for Multiple Providers

To allocate the correct amount to the correct provider, the preferred method for payment allocation will be based on selecting the income provider in the Provider and Income drop down menus in the 'New Payment' screen.

Payment allocation for individual provider:

- Search for the ACC Account in the Patient Search screen and make it available on the palette.
- Navigate to **Module ► Accounts ► New Payment**.
- The 'New Payment' screen will appear.
- In the 'Header' section, choose the Service Provider and Income Provider from Provider and Income drop down menus.
- Click the '**Allocate**' button in the 'Payment' section.
- It will display the list of ACC Claims under the Invoices section.



- Select the claim for which the payment must be made and click the '**View Invoice**' button.
- The 'View Claim' screen will appear with a list of invoices under that claim.
- Select all the paid invoices for the provider selected in the Income Provider drop down menu and click '**OK**'. The total amount for the selected invoices will be displayed in the bottom of the 'View Claims' screen.

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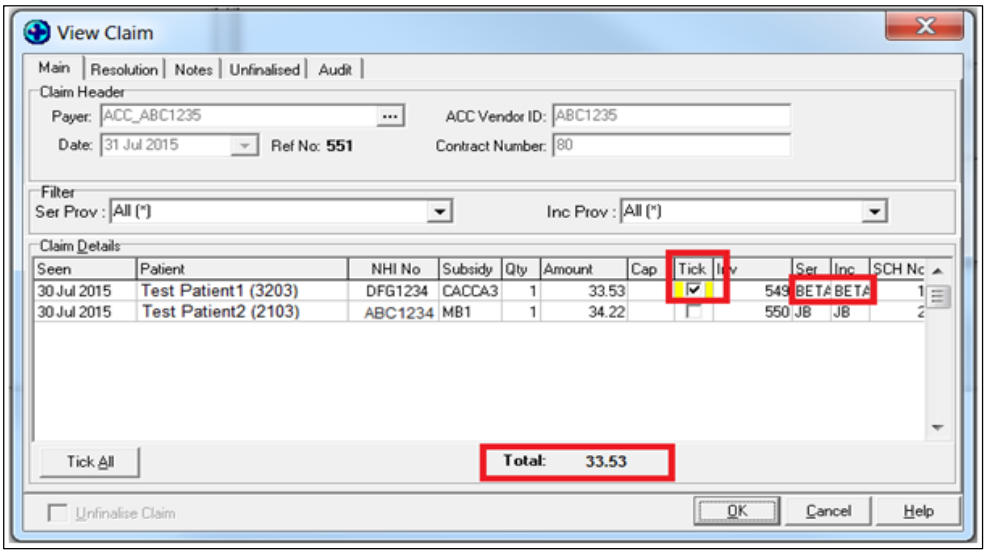
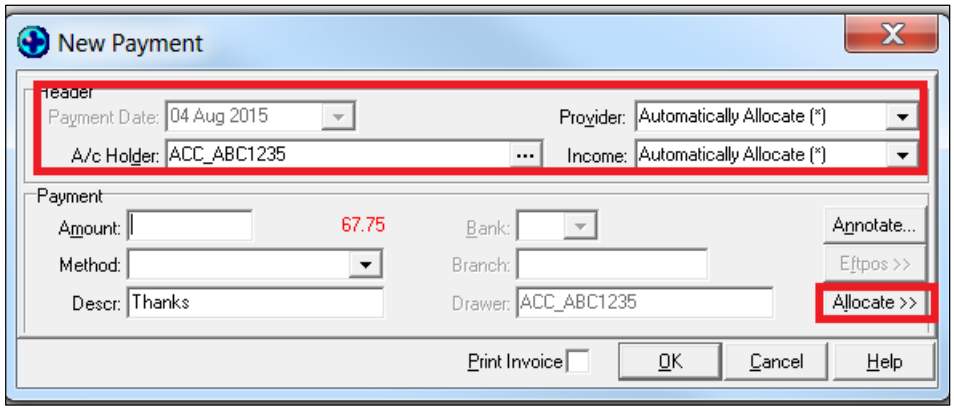


- In the 'Payment' section enter the total amount paid, select the payment type and click '**OK**'.
- The above steps need to be repeated to allocate the payment for all the other providers.

Automatic payment allocation for multiple providers:

- Navigate to **Module ► Accounts ► New Payment**.
- The New Payment screen will appear.
- The Income and Provider drop down menus will default to the 'Automatically Allocate (*)' option.
- Click the '**Allocate**' button in the 'Payment' section.



- It will display the list of ACC Claims under the Invoices section.
- Select the claim for which the payment must be made and click the '**View Invoice**' button.
- The total amount for the selected invoices will be displayed in the bottom of the 'View Claims' screen.
- In the Payment section enter the Total amount paid, select the payment type and click '**OK**'.

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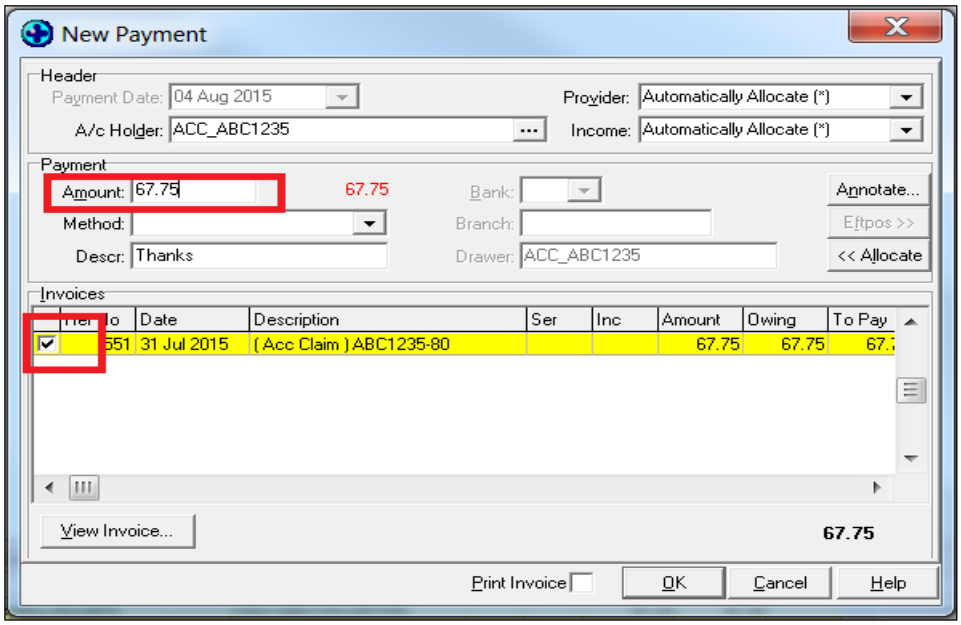
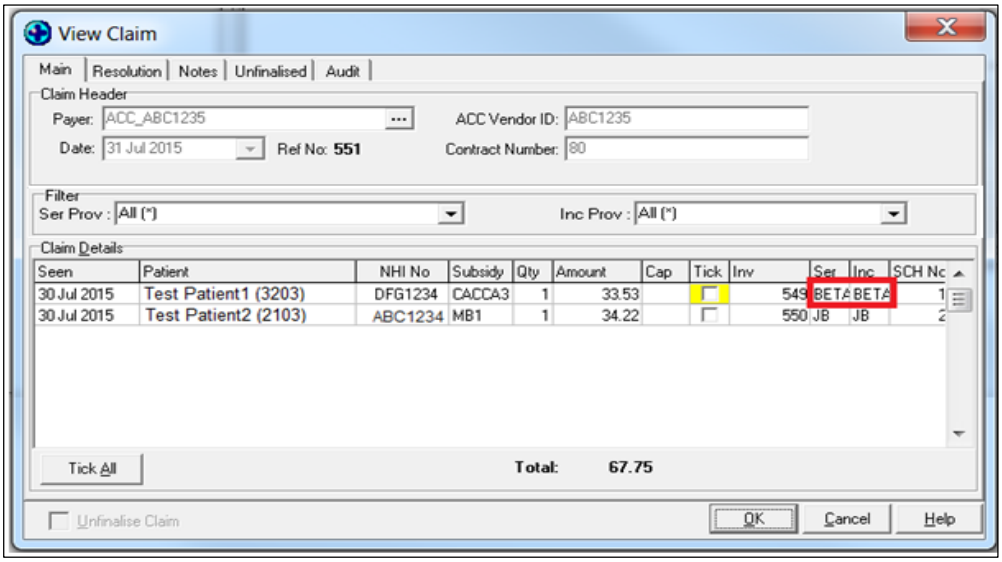


- The total amount will be allocated to the latest provider (i.e. provider displayed in the first line of the grid [Sch No 1]) available in the 'Claim Details' section of the 'View Claim' screen. For example, the total amount will be allocated to Provider 'Beta' and later Beta will have to pay the corresponding amount to JB.



- The details of how much money the provider who received the allocated full amount would have to transfer to each provider in the claim file will be provided under a new ACC Specific Transfer Report.

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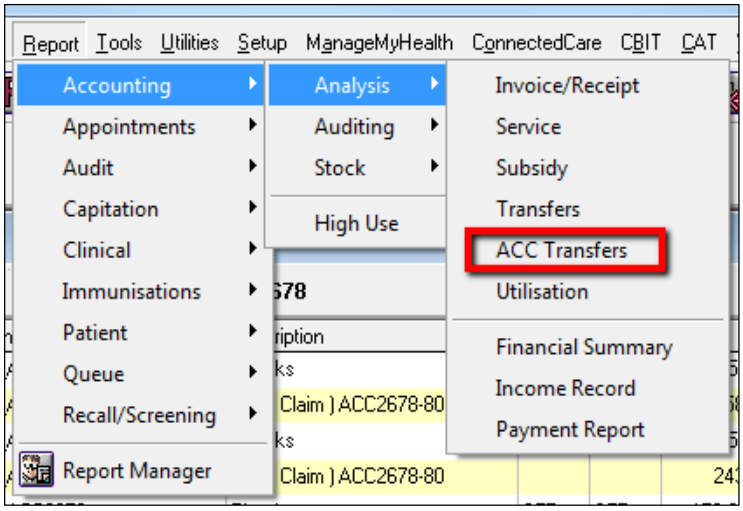
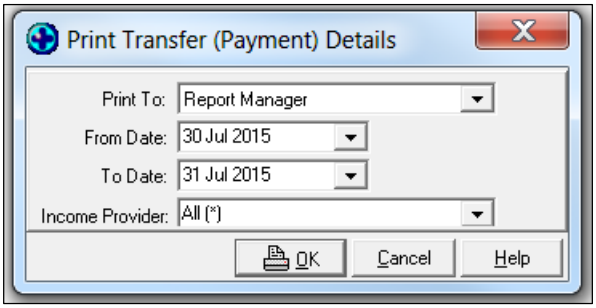
Report generation for ACC transfers on new payment allocation

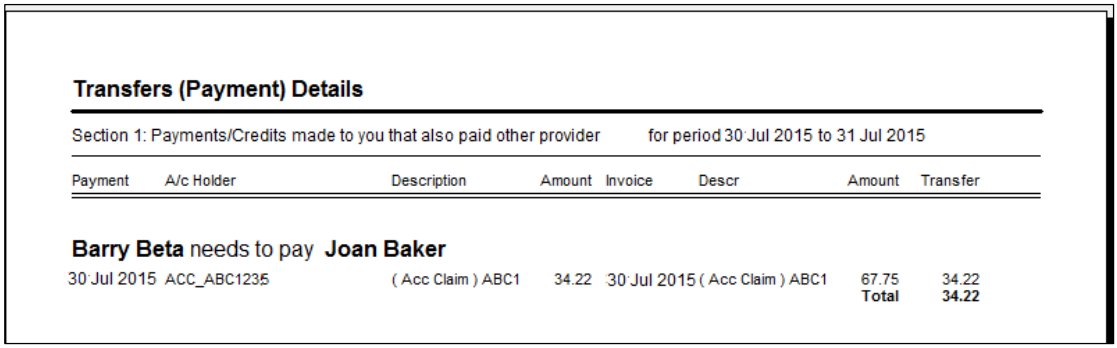
- To generate a Transfer Report of ACC claims, navigate to **Report ► Accounting ► Analysis ► ACC Transfers**.



- The 'Print Transfer (Payment) Details' screen will appear. Enter the required details and click the '**OK**' button.



- The transfer report will be generated and is available under the **Report ► Report Manager**. For example, the Transfer Report below displays how much money the provider 'Beta' (who received the allocated full amount as detailed in the previous section) has to transfer to provider 'JB' as part of the claim file.



Transfers (Payment) Details

Section 1: Payments/Credits made to you that also paid other provider for period 30 Jul 2015 to 31 Jul 2015

Payment	A/c Holder	Description	Amount	Invoice	Descr	Amount	Transfer
Barry Beta needs to pay **Joan Baker**							
30 Jul 2015	ACC_ABC1235	(Acc Claim) ABC1	34.22	30 Jul 2015	(Acc Claim) ABC1	67.75	34.22
						Total	**34.22**

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- Online Chat: www.medtechglobal.com
- Email: support@medtechglobal.com
- Phone: **0800 2 MEDTECH (633 832)**

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