Reduce

DOUBLE
BOOKINGS
and **NO SHOWS**

CGM MEDEDI

Billing and Practice Management

CALENDAR & PATIENT INTAKE
TRAINING MANUAL

brought to you by **CGM** CompuGroup Medical

Contents

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 here.

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 https://portal.cgmsa.co.za/

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
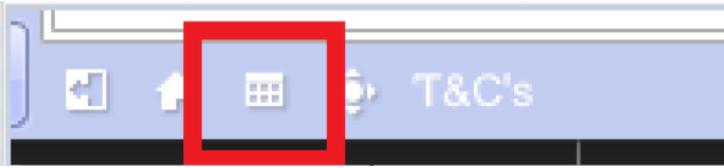
Clicking on this new button will open the CGM MEDEDI Calendar screen for you
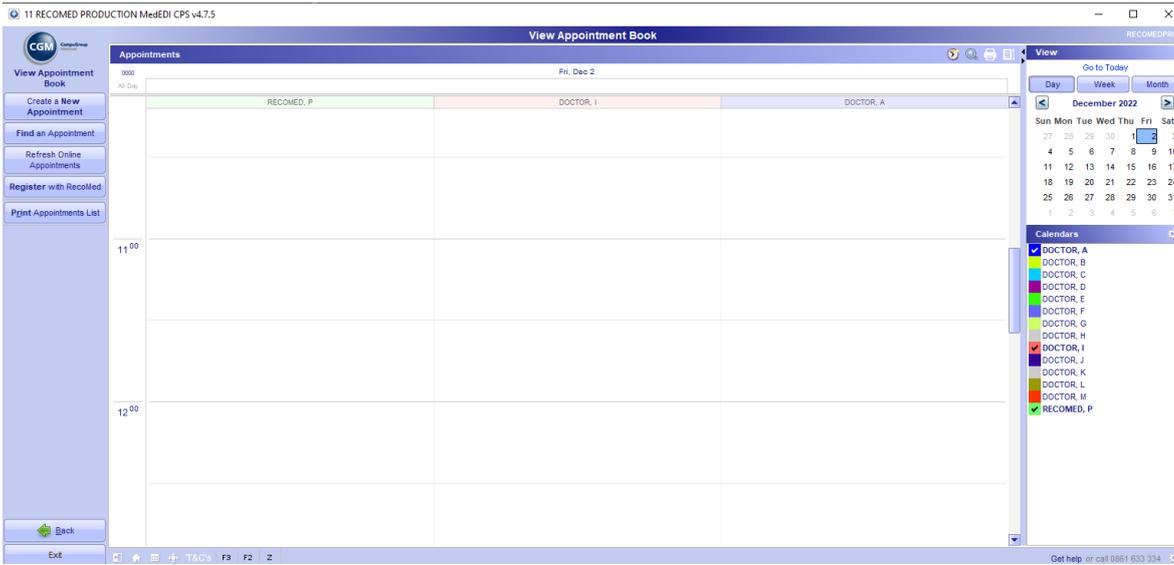
The components of the Calendar Screen are as follows:

Navigation

1.   Create a New Appointment
2.   Find an Appointment
3.   Refresh Online Appointments
4.   Register with RecoMed
5.   Print Appointment List

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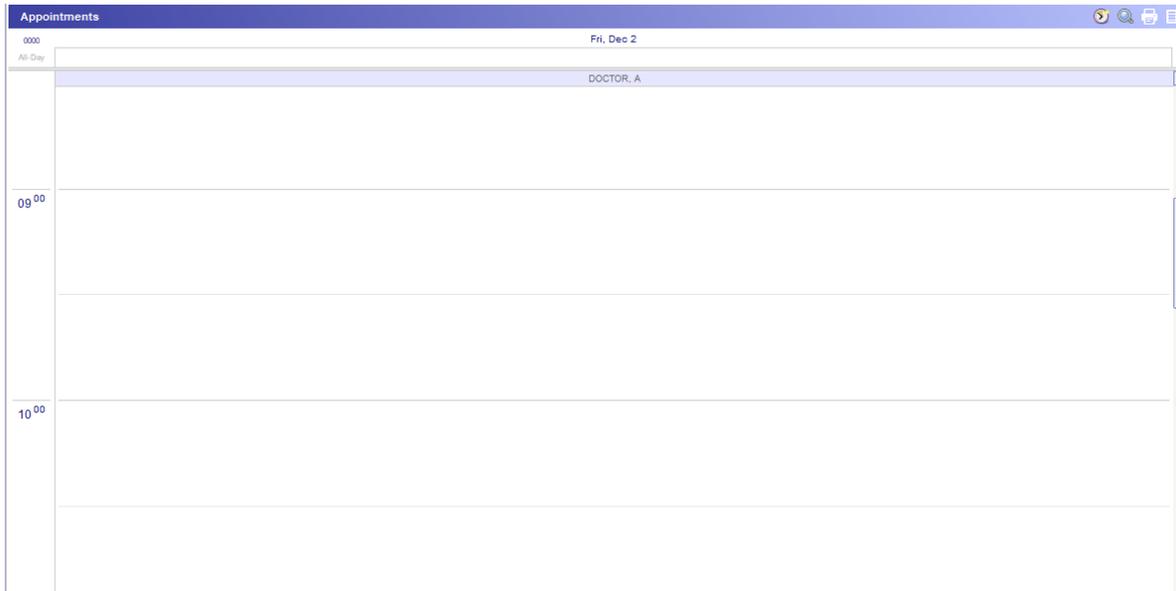
In this view area you can double click on a time slot to create an appointment for the desired time.

Date Selector
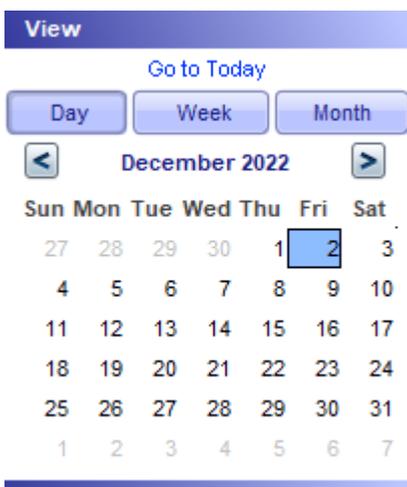
1. **Go to Today**
   Allows you to navigate to todays date from any date that you have selected
2. **Day / Week or Month View**
   Change the View Area of the Calendar to display either   Day/Week or Month view
3. **Month and Year Selector**
   Allows you to change the date to a different month or year

Calendar Settings

1. **Global Calendar Settings**

   Allowing you to change the settings for the entire Calendar like, Timeslots, Default Appointment Duration and Working hours
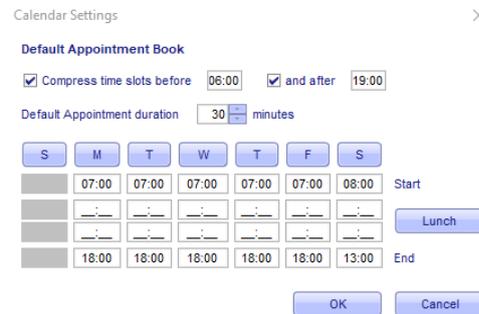
2. **Doctor Selection Panel**

   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.
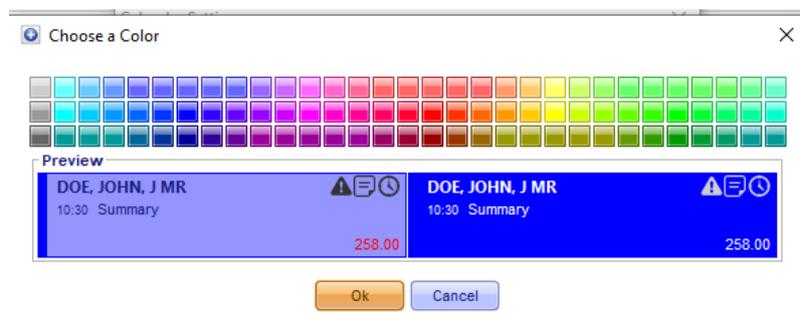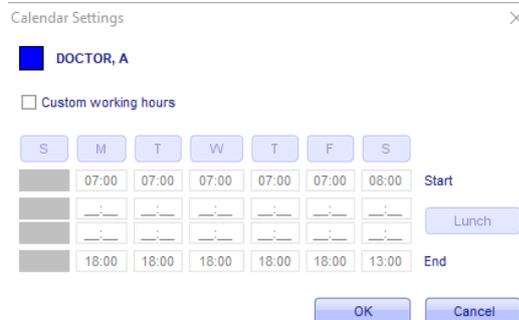
Creating a New Appointment

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
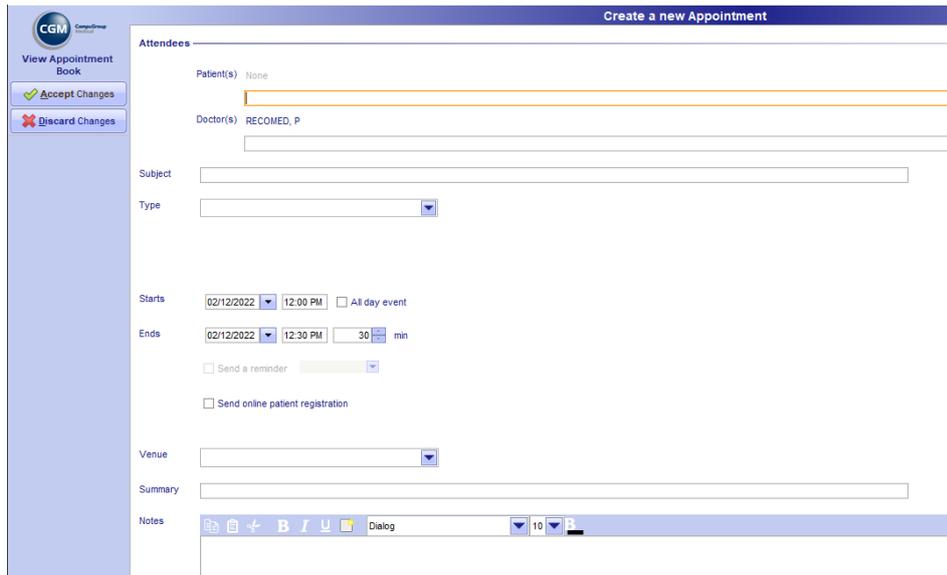
3. Start by typing in the patient name or surname, this will open a dialog box showing you the possible patients that is already on your Database, if the patient is in the list, simply select it.
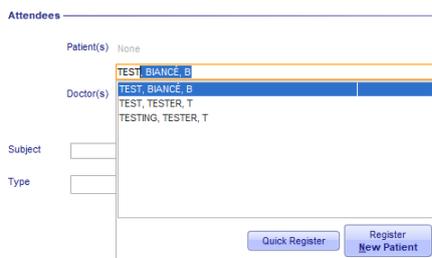
4. If the patient is new and you need to add them, click on the "Quick Register" button.

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.

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.

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.

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.

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.

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.

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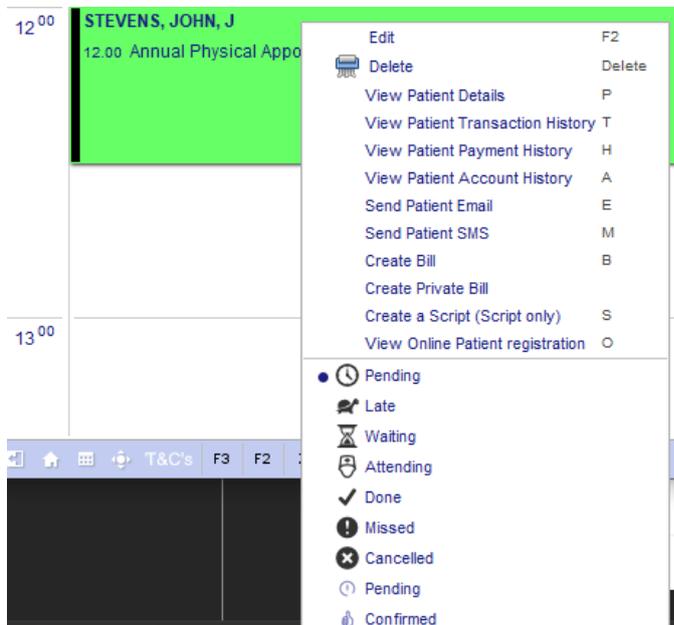
16. Left Clicking on the Appointment allows you to see important information about it and read notes quickly, it will also highlight any outstanding amount the patient owes in red.

17. Reminders can be sent when making an appointment. This can be sent on the day or the day before the appointment.
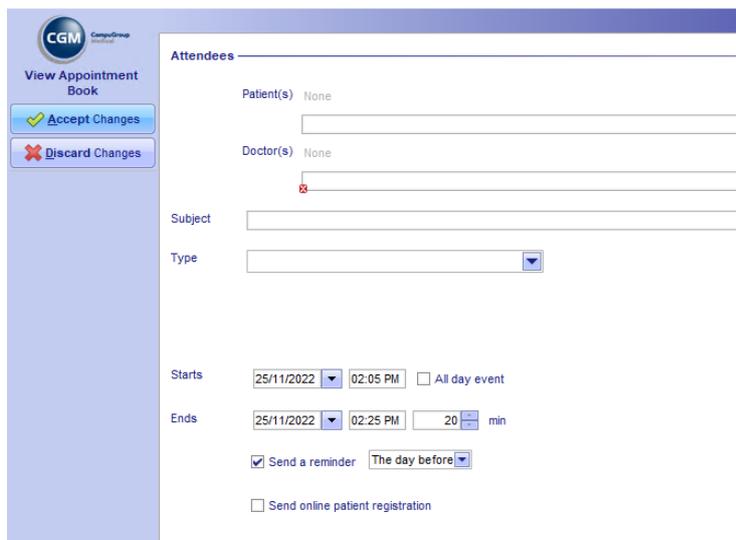
18. SMS can be sent from an appointment slot as well. This applies to sending an email as well

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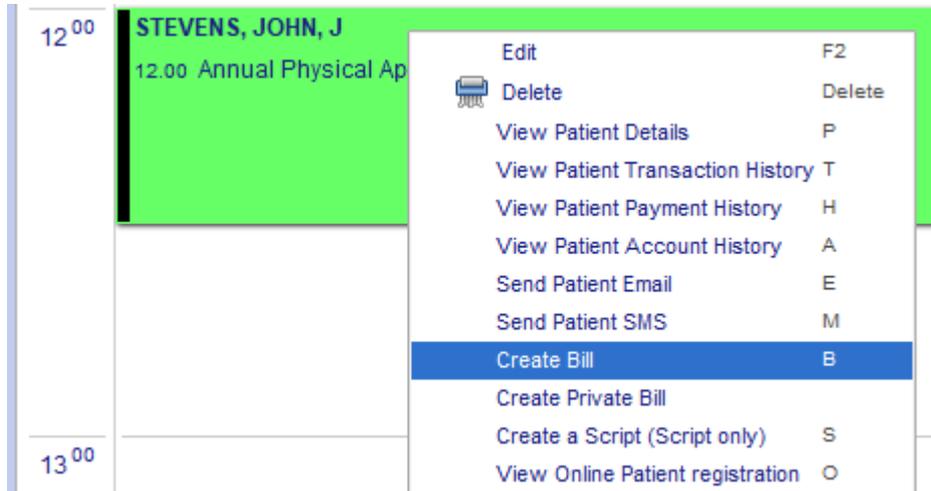
2. This will bring up the Bill Details Screen with the Patient already selected and allow you to bill the patient by adding Diagnosis, procedures, consultation etc.

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)"