



**INDIGENOUS HEALTH**

**SERVICE ACCESS SCHEME**

**USER MANUAL**

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## Step 1 LOGGING IN

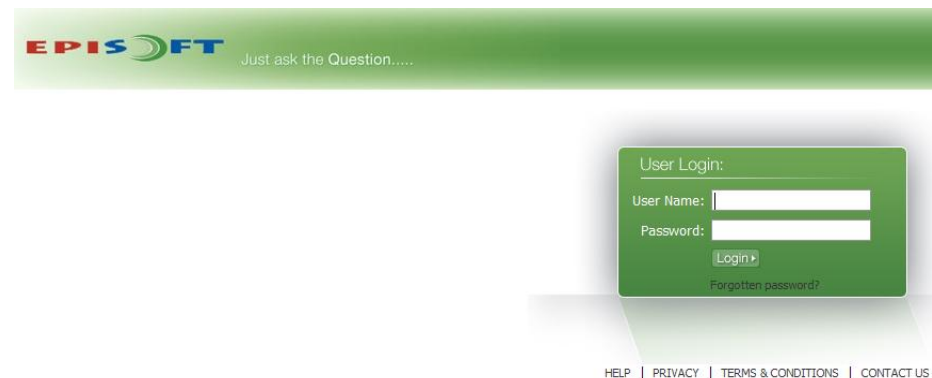
You can log in either by entering the URL of the website <https://www.episoft.com.au/epidir/login.aspx>.

**Please note if you do this you must start with https:// as the site has security set up to protect you and your patients.**

Alternatively you can go to [www.episoft.com.au](http://www.episoft.com.au) and click on the Login link in the top right hand corner:



You will then be presented with the login page:



Enter the details provided to you by SCDGP staff and click Login. On first login you will be asked to change your password. Your password must contain at least six characters and one numeral. You may also complete the 'challenge' questions/answers. These can be used at a later date if you forget your password.

## Step 2 LOCATING A PATIENT

### Step 2a A patient who has previously visited your practice

Your home page is the patient list for your practice. If a visit has been recorded for your patient, his/her name will appear in this list:

NCACCH ID	Patient Name	MRN #	Card No	Card Ext	Renewal Date	Card Status	Patient Status	Date of Birth	Total Visits	Visits since 1 March	Forms last month	Forms this month
1	Boswell, Mark	4545	1516	1	22/05/2007	Eligible	Eligible	01/01/1978	10	0	1	0
647	Harvey, Gordon	98300	720	1	04/06/2009	Eligible	Eligible	19/05/1971	0	0	0	0
142	Jones, Rona	34567	25	1	21/12/2009	Eligible	Eligible	01/05/1986	1	0	1	0
1449	Newell, Gary	3334	1992	2	18/02/2008	Eligible	Eligible	01/03/2003	1	0	1	0
2	Newell, William	3333	1514	1	29/05/2007	Eligible	Eligible	01/02/1970	0	0	0	0
2169	Watson, Ian	7834	5	2	06/11/2009	Eligible	Eligible	25/11/1974	3	0	3	0
2170	Watson, Joel	98303e	5	3	06/11/2009	Eligible	Eligible	02/03/2001	9	0	9	0
2170	Watson, Joel	98303e	720	2	04/06/2007	Eligible	Eligible	02/03/2001	9	0	9	0
1327	Watson, Tammy	983043	5	4	06/11/2007	Eligible	Eligible	31/10/2002	3	0	3	0
1327	Watson, Tammy	983043	720	3	04/06/2007	Eligible	Eligible	31/10/2002	3	0	3	0
139	Watson, Wendy	98742	5	1	06/11/2009	Eligible	Eligible	18/06/1978	1	0	1	0

You will see the list contains a number of details about your patient:

**NCACCH ID:** Unique identifier for each patient registered with NCACCH

**Card No:** Number written on the Health Access Card the patient will present to you when they visit

**Card Ext:** Number of the individual patient on the card (similar to Medicare)

**Renewal Date:** Date at which patient last renewed with NCACCH

**Patient Name:** As recorded with NCACCH

**MRN:** This is the identifier of the patient as contained in your own practice software

**Total Visits:** Every visit ever recorded by the patient at your practice

**Visits for year:** Under your contract terms patients are allowed a specific number of visits for year - this lists the number recorded in the current year

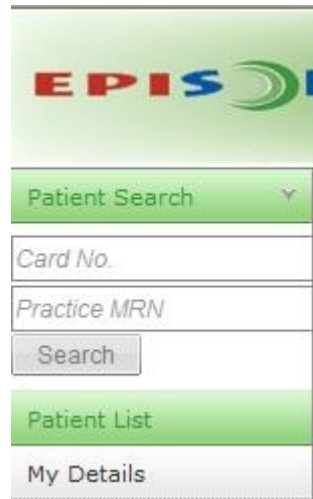
**Visits Last Month:** This number is provided to assist you with patient management

**Visit This Month:** This number is provided to assist you with patient management

This listing is ordered by the Card Number then the names of the patients appearing on the card. If patients appear on more than one card they will also appear more than once on your list. This is not a problem - you will just enter the visit once against the patient as all visits records are attached to patients not to card numbers. Click on the matching patient to proceed.

## Step 2b A patient who has not previously visited your practice

If you receive a visit from a patient registered with NCACCH but new to your practice you will need to find the patient and then provide them with your Medical Record Number (MRN). To find the patient you will need to search by their Card Number. This can be done using the left hand menu *Search* option.



The screenshot shows a web interface for patient search. At the top is the EPIS logo. Below it is a green header with 'Patient Search' and a dropdown arrow. Underneath are two input fields: 'Card No.' and 'Practice MRN'. A 'Search' button is positioned below the 'Practice MRN' field. At the bottom of the search area are two more options: 'Patient List' (highlighted in green) and 'My Details'.

If you type the number of the card into the corresponding field and click *Search* you will see a patient list with all patients appearing on the card. Click on the matching patient to proceed.

### Step 3 ENTERING VISIT DATA

If you are adding a new visit for patients who have already been to your practice please go to Step 3b.

#### Step 3a Filling in the MRN

If you are adding a visit for a new patient you see the following page. You will be required to enter 'Your Reference (MRN)' for the patient as contained in your software. (You will receive separate training on obtaining this number from your software.) Once entered click Save. Then click *New Visit* from the left hand menu.

Now go to Step 3c.

The screenshot shows the EPISOFT software interface for editing a patient record. The header includes the EPISOFT logo and the slogan "Just ask the Question.....". A "LOG OUT" button is in the top right. A navigation menu on the left lists options like "Patient Record", "Edit Patient", "New Visit", "Edit Visit", "Delete Visit", "Patient Search", "Patient List", "Reports", and "My Details". The main content area is titled "Edit Patient" and contains the following fields:

- Episoft ID: 2
- Surname: Newell, Given Name(s): William
- Date of Birth (format dd/mm/yyyy): 01/02/1970, Age (Years): 40
- Sex: Male (selected), Female, Unknown
- Your Reference (MRN#): 3333
- Address Details section (collapsed): Street Name, Suburb/Town, State/Province, Postal/Zip code
- Contact Details section (collapsed): Phone
- Ethnicity section (collapsed): Ethnic Background: Aboriginal

At the bottom right of the form are "Save" and "Cancel" buttons. The top right of the main area displays "Welcome to Emily Bronte EpiSCDGP-Excelsior Rd Medical Centre-GP".

### Step 3b Adding a new visit for an existing patient

If your patient has already attended your practice you will see a list of all visits. Click on New Visit from the left hand menu.

**Patient Record** ▼ Joel Watson **DOB** 02 Mar 2001 **MRN# ID** 2170 Welcome to Emily Bronte  
Service Access Scheme -Excelsior Rd Medical Centre-GP

#	Date	Reason for Visit	Visit Type	Clinician
3	Thu, 11/02/2010	Consultation	Child Visit	GP
2	Thu, 11/02/2010	Consultation	Child Visit	GP
1	Fri, 05/02/2010	Consultation	Child Visit	GP

**Visit Summary** | Visit Forms | Patient Reports | Patient Documents | Tasks | Authorise

Date of Visit	11/02/2010
Reason for Visit	Consultation
Visit Type	Child Visit
Clinician	Emily Bronte (GP)

### Step 3c Entering new visit details

The following page explains the components on this page. Whether you are entering a visit for a new or existing patient you will see a page something like this OR you will see a message explaining that the current patient is not eligible for a new visit. Reasons for visit prevention or rejection are consistent with your contract with SCDGP. They are listed on the final page of this document.

The screenshot shows a web application interface for entering patient visit details. At the top, a header bar displays patient information: "Joel Watson DOB 02 Mar 2001 MRN# ID 2170". Below this is a table of "Visit records" with columns for #, Date, Reason for Visit, Visit Type, and Clinician. The table contains three rows of visit data. Below the table is a "Visit Summary" form with fields for Date of Visit, Reason for Visit, Visit Type, and Clinician. Callouts point to specific elements: "Patient Details" points to the patient information header; "Visit records" points to the table; "Defaults to today's date" points to the Date of Visit field which shows "16/2/2010"; "Determined by patient's DOB" points to the Visit Type dropdown which is set to "Child Visit".

#	Date	Reason for Visit	Visit Type	Clinician
3	Thu, 11/02/2010	Consultation	Child Visit	GP
2	Thu, 11/02/2010	Consultation	Child Visit	GP
1	Fri, 05/02/2010	Consultation	Child Visit	GP

**Visit Summary**

Date of Visit: 16/2/2010

Reason for Visit: Consultation

Visit Type: Child Visit

Clinician: Emily Bronte (GP)

Buttons: Save, Cancel

To enter a new record you need to complete the information under the grey horizontal menu bar that has *Visit Summary* highlighted in bold as follows:

Date of Visit: Enter date the visit occurred

Reason for Visit: Can be left at Consultation

Visit Type: This will default to either Child or Adult depending on the patient's age. This can be altered in the rare event that the patient has moved from child to adult since they visited and you are entering the visit details after the event

Clinician: This will be a dropdown list of GPs participating at your practice

Once complete click Save.

## Step 4 ENTERING CLINICAL DATA FOR A VISIT

### Step 4a Displaying the list of available forms

Once your new visit has been saved other menu options in the horizontal menu bar will become available. Click on the *Visit Forms* link next to the Visit Summary:

The screenshot shows a patient record for Joel Watson (DOB 02 Mar 2001, MRN# ID 2170). A message at the top states "Successfully Saved the Patient Visit Record". Below this is a table of visits:

#	Date	Reason for Visit	Visit Type	Clinician
4	Tue, 16/02/2010	Consultation	Child Visit	GP
3	Thu, 11/02/2010	Consultation	Child Visit	GP
2	Thu, 11/02/2010	Consultation	Child Visit	GP

Below the table is a horizontal menu bar with the following options: Visit Summary, Visit Forms (highlighted with a red circle), Patient Reports, Patient Documents, Tasks, and Authorise. Below the menu bar is a summary table:

Date of Visit	16/02/2010
Reason for Visit	Consultation
Visit Type	Child Visit
Clinician	Emily Bronte (GP)

### Step 4b Open the clinical form

Click on the link for the visit form. In this case it is a Child Visit.

The screenshot shows the same patient record as above. The horizontal menu bar now includes a 'Child Visit' link, which is highlighted with a red circle. Below the menu bar is a table with the following columns: Date Created, Date Last Modified, Modified By, Complete, and Print Report. The 'Complete' column contains a checkbox and the text 'No Data'. At the bottom right, there is a checkbox labeled 'Complete All'.

### Step 4c Enter the data

Following is the child visit form which will be opened in either a new window or a new tab. There are two mandatory sections on the form - ear examination and the remaining elements. You need to make one selection for the ear examination question and tick at least one of the other boxes.

### Child Visit

Joel Watson DOB 02 Mar 2001 UR# ID 2170

CLINICAL INFORMATION	CHILD HEALTH
Result of ear examination <i>N.B: This question <u>must</u> be completed</i>	<input type="radio"/> Normal <input type="radio"/> Abnormal <input type="radio"/> N/A
<i>Tick all boxes below relevant to the patient's presentation</i>	
Cardiac	<input type="checkbox"/>
Dermatology	<input type="checkbox"/>
Endocrine	<input type="checkbox"/>
ENT	<input type="checkbox"/>
Gastrointestinal	<input type="checkbox"/>
Mental Health	<input type="checkbox"/>
Musculo-skeletal	<input type="checkbox"/>
Renal	<input type="checkbox"/>
Respiratory	<input type="checkbox"/>
Reproductive / Sexual Health	<input type="checkbox"/>
Other (please state)	<input type="checkbox"/>

If you select the tick box for other you will see a text box. You will need to enter data in here if *Other* is selected

Other (please state)

Once complete click *Save*.

Then click *Close*.

If you are entering an Adult Health Visit the form will look like this:

### Adult Visit

Ian Watson DOB 25 Nov 1974 UR# ID 2169

CLINICAL INFORMATION	ADULT HEALTH
Is the patient a smoker? <i>N.B: This question <b>must</b> be completed</i>	<input type="radio"/> Yes <input type="radio"/> No
<i>Tick all boxes below relevant to the patient's presentation</i>	
Cardiac	<input type="checkbox"/>
Dermatology	<input type="checkbox"/>
Endocrine	<input type="checkbox"/>
ENT	<input type="checkbox"/>
Gastrointestinal	<input type="checkbox"/>
Mental Health	<input type="checkbox"/>
Musculo-skeletal	<input type="checkbox"/>
Renal	<input type="checkbox"/>
Respiratory	<input type="checkbox"/>
Reproductive / Sexual Health	<input type="checkbox"/>
Other (please state)	<input type="checkbox"/>
Pregnancy (optional)	<input type="checkbox"/>

The form operates in a similar way to the Child Health Visit form. You must enter a response to the Smoking question and at least one of the other boxes must be ticked. A text box will appear if you click *Other*.

Pregnancy is not included in the mandatory list.

## EXCEPTION CASES

In keeping with the terms of your contract, certain conditions need to be fulfilled for you to be able to create new visits and to enter clinical data. The patient list displays the critical data for your patients which indicates whether you can add new visits or visit forms. If the following conditions occur you will see the listed message when you attempt to add a new visit or visit form OR if the patient is new to your practice, when you select the patient from the list.

**You will not be able to add a new visit and the patient should be directed to NCACCH.**

### Case 1: Card has not been renewed

NCACCH ID	Patient Name	MRN #	Card No	Card Ext	Renewal Date	Card Status	Patient Status	Date of Birth	Total Visits	Visits since 1 March	Forms last month	Forms this month
142	Jones, Rona	34567	25	1		Eligible	Eligible	01/05/1986	1	0	1	0

Cards need to be renewed from time to time. Renewed cards will have a date listed under 'Renewal Date'. If there is no date the card is not current. In future some renewal dates will be too far in the past to qualify. In these cases you will see the message:

**This patient does not have a current card. Please ask patient to contact NCACCH on 5443 3599.**

### Case 2: The card has been deactivated at NCACCH

NCACCH ID	Patient Name	MRN #	Card No	Card Ext	Renewal Date	Card Status	Patient Status	Date of Birth	Total Visits	Visits since 1 March	Forms last month	Forms this month
647	Harvey, Gordon	98300	720	1	04/06/2009	Ineligible	Eligible	19/05/1971	0	0	0	0

Although a patient may have a card, they card may have been deactivated by NCACCH since the patient received it (for example if they have left the Sunshine Coast). The way you can see if this has occurred is if the 'Card Status' has been set to *Ineligible*. In this case you will see the message:

**This Health Access Card is not active. Please ask patient to contact NCACCH on 5443 3599.**

### Case 3: The patient has been deactivated at NCACCH or is no longer listed on the card

NCACCH ID	Patient Name	MRN #	Card No	Card Ext	Renewal Date	Card Status	Patient Status	Date of Birth	Total Visits	Visits since 1 March	Forms last month	Forms this month
2169	Watson, Ian	7834	5	2	06/11/2009	Eligible	Ineligible	25/11/1974	3	0	3	0

Patients may have been deactivated at the discretion of NCACCH OR the patient may no longer be listed on the presented card. In these circumstances the 'Patient Status' will be listed as *Ineligible* and you will see the following message:

**This patient is not active or not active on this card. Please ask patient to contact NCACCH on 5443 3599.**

**Case 4: The patient has already had 36 visits recorded in the current NCACCH billing year**

NCACCH ID	Patient Name	MRN #	Card No	Card Ext	Renewal Date	Card Status	Patient Status	Date of Birth	Total Visits	Visits since 1 March	Forms last month	Forms this month
647	Harvey, Gordon	98300	720	1	04/06/2009	Ineligible	Eligible	19/05/1971	0	36	4	4

Under the terms of the contract each practice is allowed payment for 36 visits for a patient in a billing year. At the time of writing the billing year runs from the 1<sup>st</sup> day of March to the last day of February the following year. If you have already recorded 36 visits for a patient you will not be able to enter any more until the following year. You will see the message:

**Sorry you have already recorded 36 visits for this patient. No further visits can be claimed under this scheme till the next billing year.**

**Case 5: The patient has already had four adult / child visit forms entered in the calendar month of the new visit date**

NCACCH ID	Patient Name	MRN #	Card No	Card Ext	Renewal Date	Card Status	Patient Status	Date of Birth	Total Visits	Visits since 1 March	Forms last month	Forms this month
647	Harvey, Gordon	98300	720	1	04/06/2009	Ineligible	Eligible	19/05/1971	0	36	4	4

Your contract states that only four adult and or child visit forms can be completed for a patient in a calendar month. If you have already recorded four visit forms you will receive the following message when you attempt to add a new form (not a new visit).

**Sorry this patient has already reached the maximum four adult and / or child visit reports this month.**

**Case 6: The patient already has a visit recorded on the new visit date**

If you have already recorded a visit for a patient on a particular date you will not be able to enter another visit for that date.

**Sorry you are allowed only one visit for a patient on any given day.**

**Case 7: The date of the new visit is prior to the first date of the previous calendar month**

Visit data will only be accepted for visits occurring within the current or the previous calendar month. So for example, if in March 2010 you attempt to enter a visit that occurred before February 2010 you will see the following message.

**Sorry the date you have entered is prior to the first day of the last calendar month.**