

## IES Medical: Overview

### Purpose

The purpose of this Document is to provide an introduction to the Medical System and also to introduce the other User Manuals.




### Introduction

The Medical Practice system is more than just Medical Billing and Patient records – in fact, it is a complete enterprise solution for Medical Practice Management. There is no need for a separate accounting product, since the Medical Billing system is supported by and fully integrated to the IES Accounting system, with some of the most flexible and powerful functions available for Inventory Management , Procurement (Purchase Orders), General Ledger, Budgets, Supplier Accounts (Payables), Customer Accounts (AR Debtors / Receivables), Cash Book(s) and a range of additional Business Modules, including a Report Warehouse that boasts standard Financial Statements in addition to a multitude of Application Reports.

The system is set up to cater for the exact needs of each Medical Practice, with Medical Aid claims automatically dealt with when needed, or not showing up when not needed. The Invoicing Catalog (called the Medical Retail Catalog) caters for international and varying requirements to process any range of Prices required (i.e. different Ratebooks for different Customer types), for Patient Excess over and above what can be claimed from Medical Aids, for automatic explosion of included Items in a standard charge (e.g. Bill-of-Materials detail that will automatically list Invoice Item detail for multiple Items on a single Charge Code), to automated Statement runs that can automatically e-mail Patient / Customer Statements by e-mail in PDF format, etc.

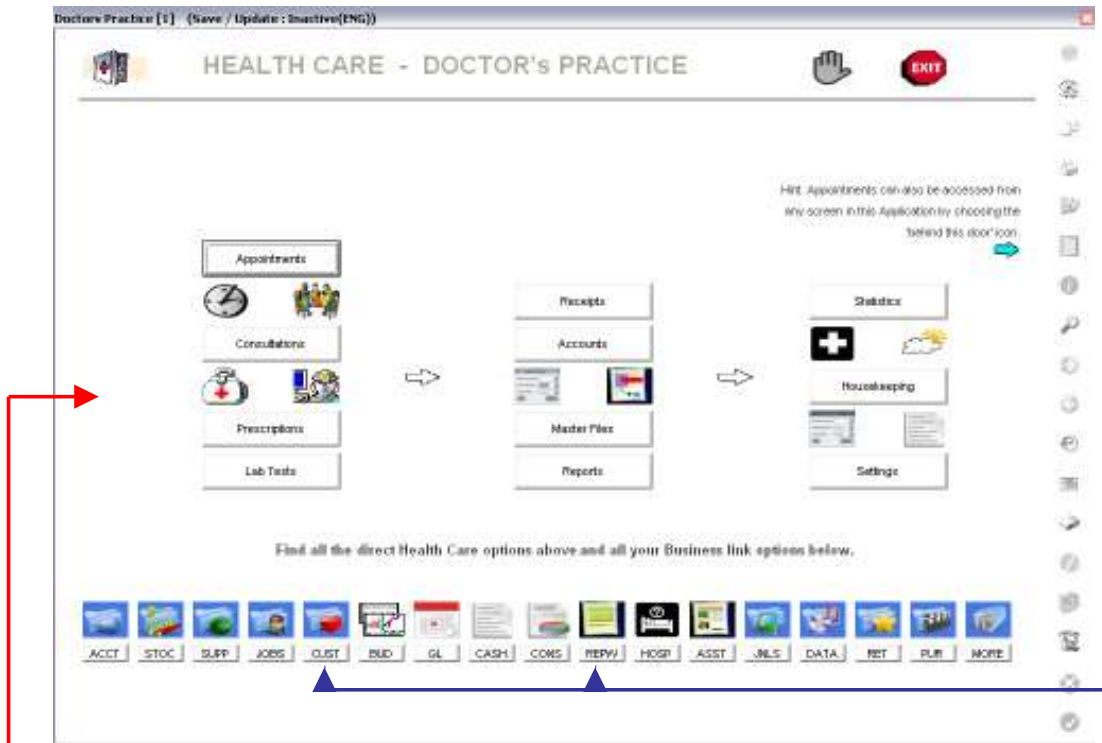
From Appointment Books where Appointments lead directly into auto-created Consultations, to on-line Prescriptions and Lab Test details, Consultation Notes and more, the system flows seamlessly through the functions and options needed to manage a Medical Practice, and automatically feeds through to the Accounting system behind the Medical module, and the system seamlessly reports Income flows per Doctor (i.e. to report Partnership Financials) on the Income Statement and other Management Reports.

The bottom line is simply that the system can be applied for any required need from simple billing (without all the bells and whistles) up to the management of a large and complex Medical Practice requiring sophisticated management and accounts, with regulated User Access Profiles, privacy controls on Patient Records and Consultation Notes, customized Invoicing and Financial Statements, Partnership and Consolidation Statements, Fixed Asset Management, etc.

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### Launching Medical System functions

The average user of the Medical system is auto set up to arrive at the Medical 'hub' of the system when logging on with a UserCode and Password. From here, the User can directly execute any and all functions in the Medical system, plus access all other parts of IES without fuss.



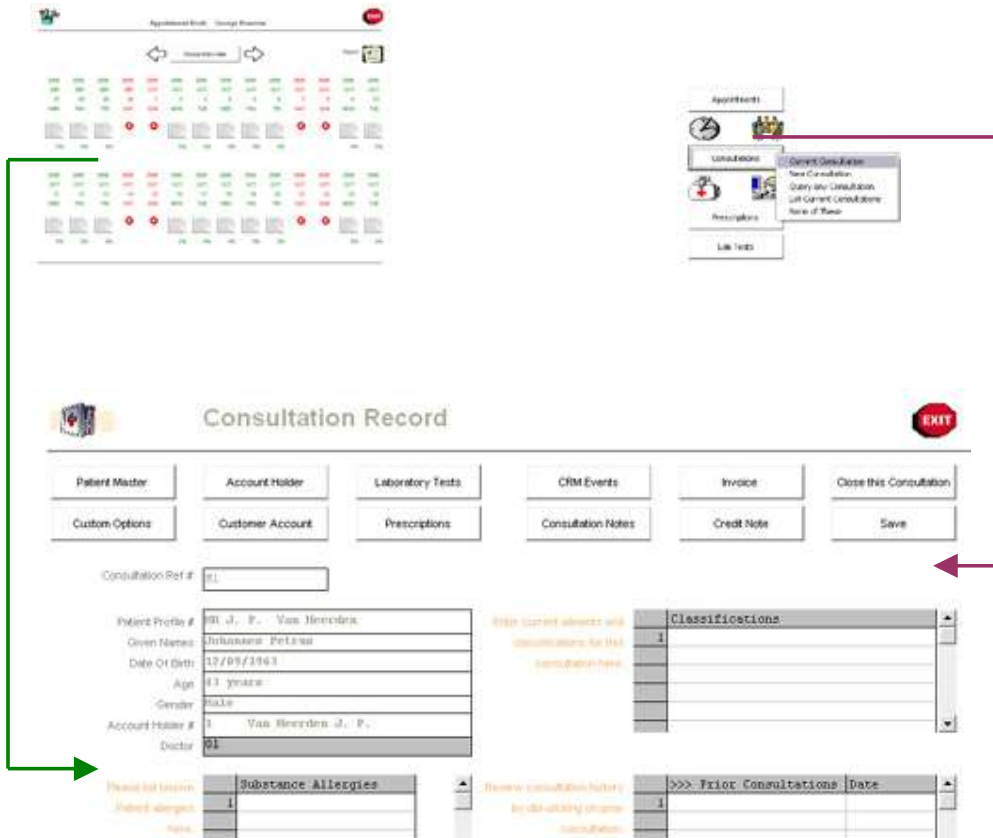
The Medical functions are easily selected by primary function, from Appointments to Consultations, Prescriptions and Lab Tests, to Receipts and Accounts, Master Files and Reports, Statistics, Housekeeping and primary Settings.

The Business links offered below the main Medical functions lead directly to other parts of the system, to use as required. For example, to produce any Financial Statements, just choose the Report Warehouse icon at the bottom, or to initiate a Patient Statement run at month end, just choose the Customer icon.

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### Consultations

Consultations represent the central event around which the Medical Practice revolves, and can be entered or opened straight from the Appointments in the Appointment Books, and / or from the CONSULTATIONS function on the main Medical launch screen.



Once a Consultation record is shown, it indicates critical Patient information, and offers links to the Patient Account, to Consultation Notes for this Patient, Invoices and Credit Notes for the Consultations, and Prescriptions and Lab Tests.

A Consultation may also be tagged with 1 or more 'classifications' that pertain to the consultation, which will be used when querying statistics in the system – for example, to ask the question, how many consultations in the last week were for 'flu', or, what percentage of consultations over the last year were 'medical check ups' ...

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### Invoices and Credit Notes

Invoices and Credit Notes are primarily accessed directly from the Consultation record, but can also be entered from the ACCOUNTS function, which also offer 'ad hoc invoices and credit notes', i.e. when the last consultation record for the Patient is already closed.

The screenshot shows two main windows. The top window is titled 'Consultation Record' and contains a menu with 'Accounts' highlighted. A red-bordered dropdown menu is open from 'Accounts', listing options such as 'Current Invoices and Credit Notes', 'List Current Invs and CRNs', 'Ad Hoc new Invoices and Credit Notes', 'Query or Report Invs and CRNs', 'De-link / Re-Link Patient Account', 'Invoice Payment Chase', 'Explain these Choices', and 'None of These'. A blue arrow points from the 'Accounts' menu in the 'Consultation Record' window to the 'Medical Invoice' window below. The 'Medical Invoice' window displays a summary of the invoice, including 'Total on this Invoice: 68.11', 'Rated Accr Excess: 523.49', and 'Invoice Total incl Tax: 523.49'. It also shows a 'Transaction Date' of 22/09/2006 and a 'My Links' section with buttons for 'Notes P5', 'More P5', 'CRM', 'Views P5', 'Drifts', 'Save P12', 'Close Inv P4', 'EXIT', 'Non-Stock', and 'Tax'. Below this is an 'ex Catalog' table with columns for Code, Store, Description, Price, Excess on Price, Qty, CRN, and Amount incl Tax.

Code	Store	Description	Price	Excess on Price	Qty	CRN	Amount incl Tax
1 853186006	00	ACCUPRIL tablet 40 mg	159.38	159.38	1.00		181.69
2 0190	*	New and established pa	300.00	300.00	1.00		342.00

Medical Invoices and Credit Notes are easy to execute, and include powerful auto-searches for charge Items on part code numbers and / or functions to locate the desired codes by typing keywords to search for.

The Invoices all have the capability to produce standard or customized Invoice layouts, and include an Excess view as well (e.g. Patient Excess over and above Medical Claim).

### Medical User Manuals


The primary Medical functions are documented in the Medical User Manuals. For example, Consultations, Invoices, etc.

For more understanding of how to use other parts of the system, e.g. Purchase Orders, Cash Book, Ledger and others, there is separate documentation (User Manuals) for each Business Module.

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