

# How to check your Medicare billings using practice software

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If these instructions do **not** work for you it may be that you have not yet been given “permission” on the practice software to access these functions.

Please speak to your practice manager as they will be able to show you how to check your billings and grant permissions in the software if they are not already set up.

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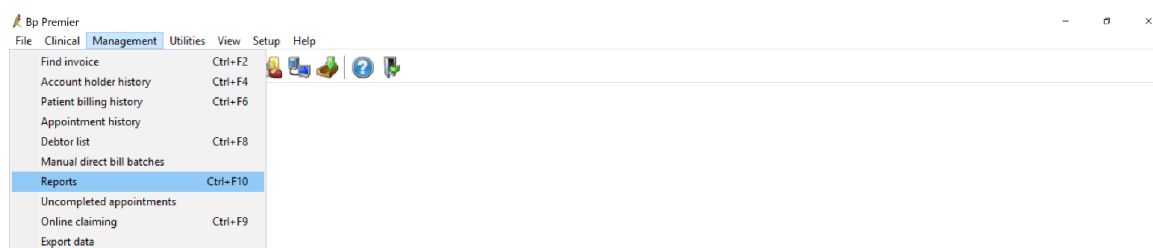
*This guide was written by GPEx Registrar Liaison Officers (RLOs), Dr Wissam Ghamrawi, Dr Natasha Nottingham, and Dr Xi Li.*

*This guide is provided as general guidance, specific questions should be directed to your practice manager or software vendor.*

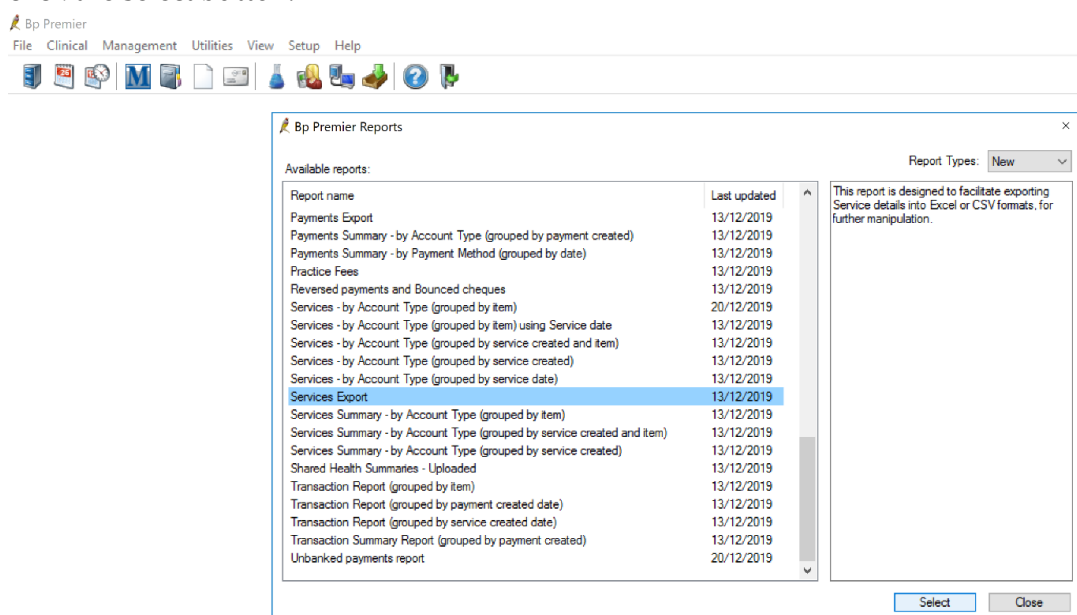
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# Best practice

1. Go to the main screen that is blank and click 'Management' then 'Reports'.



2. Scroll down in the list until you get to 'services export'. All of the services options will display billings in a different format. Preferred is 'services export' which displays billings grouped by patient. This is the easiest format to check billings as more than one item number may be billed to the one patient for the same attendance. Alternatively, selecting 'services by account type (grouped by item)' will show you services grouped by item number. Once you have highlighted your desired option click the select button.



3. A pop up window will appear that allows you to enter the date range, location and provider. Once you have selected the correct boxes and date range click 'view report'

Choose the Report Parameters

Date, Locations, Providers

Billing

Banking

Configuration

Dates:

☒ Range:

Start: 25/05/2020

End: 26/05/2020

☐ Period:

Select All

Deselect All

☒ Medical Centre

Providers:

Select All

Deselect All

☒ Dr Natasha

View Report

Cancel

4. Depending on the option you selected in step 2 one of the following screens will appear. The first is 'services export' which displays the information by patient and allows you to see all items billed to a particular patient. Note there is more information available in the table but for confidentiality only the column headers are included in the image below. 'Services export' is my preferred view. Alternatively, if you selected 'services by account type (grouped by item)' you will see the second table below which groups the services by item number. Patient details have been removed from the table for privacy.

Bp Report Viewer

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Services Export Report Report version: 1.15 Report Period: 25/05/2020 - 26/05/2020

Location	Provider	Schedule	Billed To	Patient Name	Patient Record No	Invoice No.	Service ID	Item No.	Description	Status	Service Created Date	Invoice Date	Service Date	Account Type	GST (\$)	Total Fee (\$ incl GST)
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Bp Report Viewer

1 of 2 Page Width Find Next

Services - byAccount Type (grouped by item)

Inv. No.	Inv. Date	Patient Name	Billed to				Account Type						GST in Total (\$)	Total Fee (\$ incl GST)
Item	Srv. ID	Srv. Date	Srv. Created	Service Details	Service Count	Status	Private (\$ excl GST)	Medicare (\$ excl GST)	DVA (\$ excl GST)	Workcover (\$ excl GST)	Other (\$ excl GST)			
<b>Medical Centre</b>					34		394.90	995.95	43.95	148.00	0.00	0.00	0.00	1,582.80
<b>Dr Natasha</b>					34		394.90	995.95	43.95	148.00	0.00	0.00	0.00	1,582.80
<b>Item 23 Surgery consultation, Level B</b>					6		143.00	152.80	0.00	0.00	0.00	0.00	0.00	295.80
Inv: 876622 25/05/2020					1		80.00							80.00
Inv: 876632 25/05/2020					1			38.20						38.20
Inv: 876641 25/05/2020					1			38.20						38.20
Inv: 876809 25/05/2020					1			38.20						38.20
Inv: 876868 25/05/2020					1		63.00							63.00
Inv: 876947 25/05/2020					1			38.20						38.20
<b>Item 36 Surgery consultation, Level C</b>					7		241.75	295.80	0.00	148.00	0.00	0.00	0.00	685.55
<b>Item 721 GP management plan</b>					1		0.00	146.55	0.00	0.00	0.00	0.00	0.00	146.55
<b>Item 732 Review of GP Management Plan or TeamCare Arr</b>					2		0.00	146.40	0.00	0.00	0.00	0.00	0.00	146.40
<b>Item 10981 Bulk billing incentive for patient at risk of</b>					0		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Item 10990 Bulk-Billing Incentive</b>					13		0.00	165.75	0.00	0.00	0.00	0.00	0.00	165.75
<b>Item 10997 Service provided to a person with a chronic d</b>					1		0.00	12.20	0.00	0.00	0.00	0.00	0.00	12.20
<b>Item 31361 Surgical excision of malignant skin lesion fro</b>					0		0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05
<b>Item 73806 Pregnancy test</b>					1		10.15	0.00	0.00	0.00	0.00	0.00	0.00	10.15
<b>Item 91809 Covid-19 GP Phone attendance less than 20 min</b>					3		0.00	76.40	43.95	0.00	0.00	0.00	0.00	120.35
<b>Dr Natasha percentage</b>							24.95%	62.92%	2.78%	9.35%	0.00%			
<b>Medical Centre percentage</b>							24.95%	62.92%	2.78%	9.35%	0.00%			
<b>Medical Services totals:</b>					34		394.90	995.95	43.95	148.00	0.00	0.00	0.00	1,582.80
<b>Percentage of Total:</b>							24.95%	62.92%	2.78%	9.35%	0.00%			

Bp Report Viewer

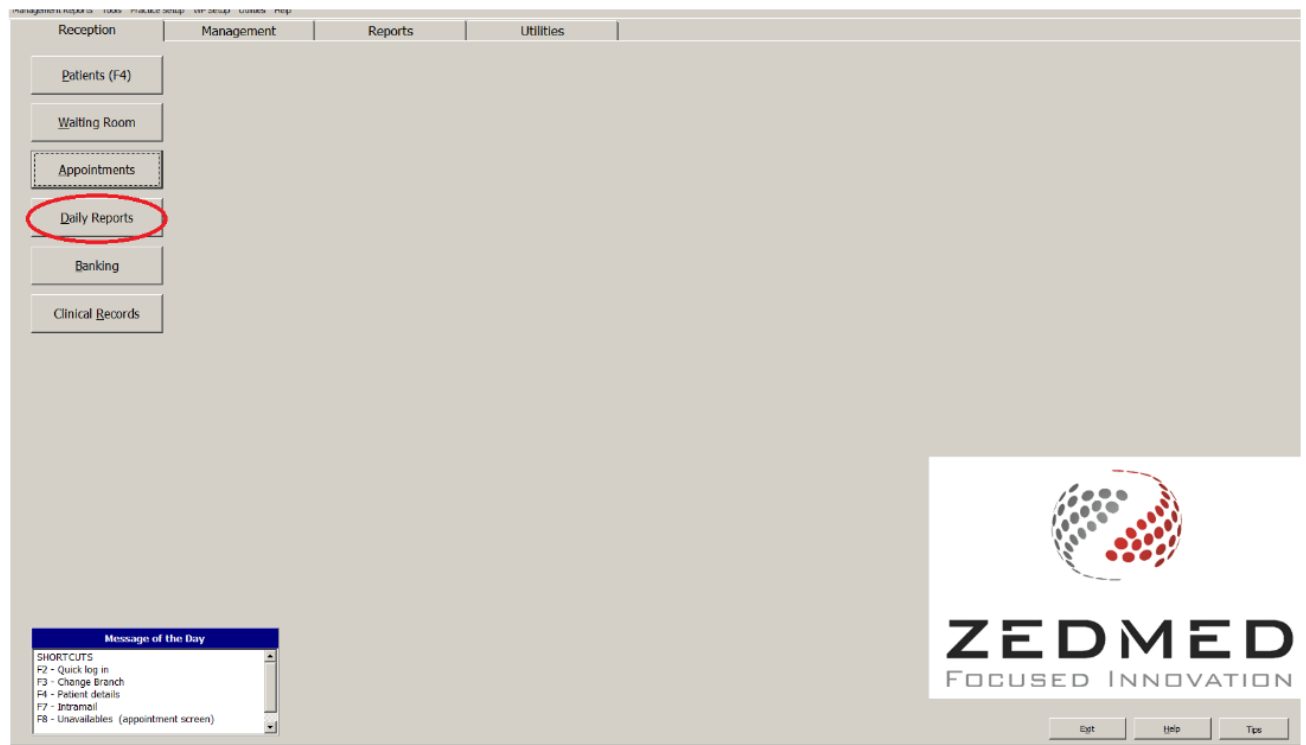
1 of 2 Page Width Find Next

Services Export Report Report version: 1.15 Report Period: 25/05/2020 - 26/05/2020

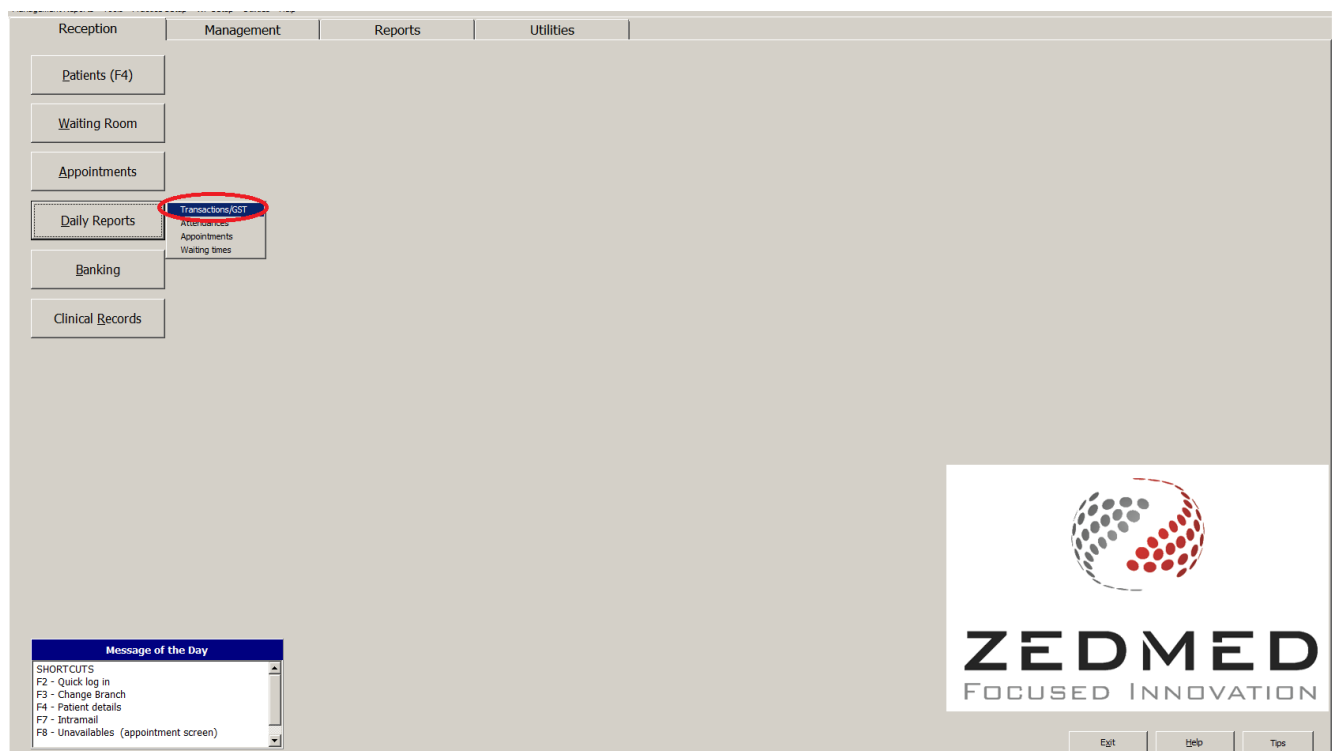
Location	Provider	Schedule	Billed To	Patient Name	Patient Record No	Invoice No.	Service ID	Item No.	Description	Status	Service Created Date	Invoice Date	Service Date	Account Type	GST (\$)	Total Fee (\$ incl GST)
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# ZedMed

1. Go to the main screen and click on Daily reports



2. Click transactions/GST



- Adjust the date period. Select treating doctor. You can sort item numbers using the item description box at the bottom of the screen. Once you are done select 'Screen'.
- This is what you should see:

Preview

Transaction GST Report

Page 1

Criteria	Style
Activity Date	26/05/2020 to 26/05/2020
Branch	All
Account Payer	All
Treating Doctor	All
User Group	All
Resource	All
Transaction Type	All
Transaction Status	All
Category	All
Item Group	All
Item Sub Group	All
Staff	All
Patient Type	All
Tax Code	All
Items	All Service Items
Group By	None
Order By	Invoice Number

File #	Patient	Payer	Date	Bm	Doc	Stf	Inv #	Item	Service Date	Type	GST	Amount
95962		GP/ND	26/05/2020	DS			246000	3	26/05/2020	Payment	-1.59	-17.50
88955		Medicare	26/05/2020	DS			255932	91810	22/05/2020	Payment		-73.95
		Medicare	26/05/2020	DS			255963	10990	22/05/2020	Payment		-12.75
		Medicare	26/05/2020	DS			255963	91809	22/05/2020	Payment		-38.20
		Medicare	26/05/2020	DS			255979	91809	22/05/2020	Payment		-38.20
62461		Medicare	26/05/2020	DS			256029	10990	22/05/2020	Payment		-12.75
62461		Medicare	26/05/2020	DS			256029	23	26/05/2020	Payment		-38.20
		Medicare	26/05/2020	DS			256034	23	22/05/2020	Payment		-38.20
		Medicare	26/05/2020	DS			256045	10990	22/05/2020	Payment		-12.75
		Medicare	26/05/2020	DS			256045	23	22/05/2020	Payment		-38.20
		Medicare	26/05/2020	DS			256048	10990	22/05/2020	Payment		-12.75
		Medicare	26/05/2020	DS			256048	3	22/05/2020	Payment		-17.50
98987		Medicare	26/05/2020	DS			256229	23	26/05/2020	Service		38.20
98987		Medicare	26/05/2020	DS			256229	23	26/05/2020	Quick Receipt		-38.20
98986		Medicare	26/05/2020	DS			256230	23	26/05/2020	Service		38.20
98986		Medicare	26/05/2020	DS			256230	23	26/05/2020	Quick Receipt		-38.20
		Medicare	26/05/2020	DS			256265	10981	26/05/2020	Service		12.75
		Medicare	26/05/2020	DS			256265	91809	26/05/2020	Service		38.20
97397		GP/SHC	26/05/2020	DS			256269	10981	26/05/2020	Service		12.75
97397		GP/SHC	26/05/2020	DS			256269	91809	26/05/2020	Service		38.20
98989		Medicare	26/05/2020	DS			256313	10990	26/05/2020	Service		12.75
98989		Medicare	26/05/2020	DS			256313	36	26/05/2020	Service		73.95
98990		Medicare	26/05/2020	DS			256315	10990	26/05/2020	Service		12.75
98990		Medicare	26/05/2020	DS			256315	23	26/05/2020	Service		38.20
88001		GP/SHC	26/05/2020	DS			256322	2713	26/05/2020	Service		72.85

No. of billings for  
the day

Total billings  
earned

Billing	Count	Value	Service	Increase	+	Void	=	Gross Bill	- Billing GST	=	Net Bill	+ Discount	+ Bad Debt	=	Net Adj	GST Credit
	11	388.80	388.80	0.00	0.00	0.00		388.80	0.00		388.80	0.00	0.00		388.80	0.00
REPORT TOTAL																
Receipts	Payment	14	-427.35	0.00	0.00			-427.35	-1.59		-425.76	388.80	-427.35		0.00	-38.55

26/05/2020 4:08:49 PM

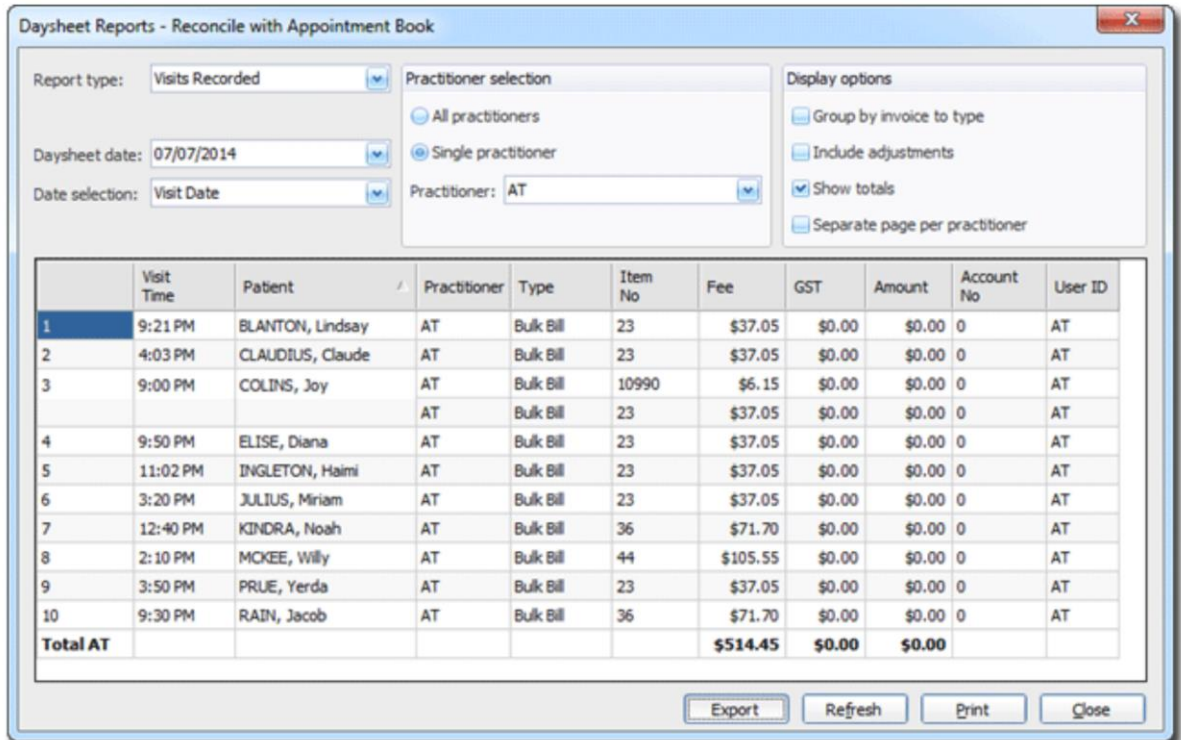
Zedmed 31.2.0.9691

# Medical director using PracSoft appointment software

A Daysheet report is for reconciling the day's transactions. This includes visits, receipts and adjustments.

1. From the Waiting Room window, click the Daysheets  button.

*(N.B. the below patient names are **not** real, this image was taken from the software guide)*



Daysheet Reports - Reconcile with Appointment Book

Report type:  Practitioner selection: ☐ All practitioners ☒ Single practitioner  
Daysheet date: 07/07/2014  
Date selection:  Practitioner:   
Display options: ☐ Group by invoice to type ☐ Include adjustments ☒ Show totals ☐ Separate page per practitioner

	Visit Time	Patient	Practitioner	Type	Item No	Fee	GST	Amount	Account No	User ID
1	9:21 PM	BLANTON, Lindsay	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
2	4:03 PM	CLAUDIUS, Claude	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
3	9:00 PM	COLINS, Joy	AT	Bulk Bill	10990	\$6.15	\$0.00	\$0.00	0	AT
			AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
4	9:50 PM	ELISE, Diana	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
5	11:02 PM	INGLETON, Haimi	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
6	3:20 PM	JULIUS, Miriam	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
7	12:40 PM	KINDRA, Noah	AT	Bulk Bill	36	\$71.70	\$0.00	\$0.00	0	AT
8	2:10 PM	MCKEE, Willy	AT	Bulk Bill	44	\$105.55	\$0.00	\$0.00	0	AT
9	3:50 PM	PRUE, Yelda	AT	Bulk Bill	23	\$37.05	\$0.00	\$0.00	0	AT
10	9:30 PM	RAIN, Jacob	AT	Bulk Bill	36	\$71.70	\$0.00	\$0.00	0	AT
Total AT						\$514.45	\$0.00	\$0.00		

2. Select the 'Report Type' from the drop-down list, options include:
  - o Visits Recorded
  - o Receipts Issued
  - o Till Summary
  - o Receipt Allocations
  - o Adjustments
3. Choose either today's date or select from the calendar.
4. Select the 'Date Selection' from the drop-down list, options include:
  - o Visit Date
  - o Entry Date
  - o Report Date

5. Select the correct single practitioner
6. Set the display options, which include 'Group by invoice type', 'Include adjustments' 'Show Totals'
7. The daysheet results will update dynamically as you make adjustments to the settings and you will be able to use this on the screen. You can also print the daysheet using the print button at the bottom of the page.