# Completing SureMed forms in MyPractice

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# SureMed User Guide for MyPractice

## Introduction

Konnect's SureMed service enables fast, easy and confidential collection of medical information required in the insurance process. Doctors can now transfer Patient data securely to the Insurers using SureMed.

SureMed service has been integrated with the MyPractice PMS (Practice Management System) giving doctors the option to complete insurance requests electronically or on paper.

1) **Electronically**: SureMed service enables GP's to securely transfer encrypted Patient data directly from the Practice Management System to Insurers via the Healthlink system.

2) **Paper Request**: SureMed service also supports paper request where a practice is not setup for electronic system or GP prefers to continue working on paper.

### Use of this Guide

This guide will give you step by step instructions on how to complete a SureMed Request in MyPractice (both electronically and on paper).

### Types of SureMed Medical Forms

The SureMed request may combine one or more of the following elements:

- 👁 *SureMed PMAR Request (Personal Medical Attendant's Report)* - typically requested if your Patient is over a set age, or if they are seeking insurance over a certain dollar amount (age and amount thresholds are set by the Insurers).
- 👁 *SureMed Questionnaire* – requested where the Patient has identified that they have a pre-existing condition (e.g. Diabetes, Asthma, Epilepsy etc).
- 👁 SureMed Exam Own Doctor – typically requested where the Patient has not been seen by their doctor for a period of time, is over a set age, or are seeking Insurance over a certain dollar amount.
- 👁 SureMed Build Exam (BMP & BP) – a short build examination that can be completed by nursing staff.

### Support for SureMed forms

Please contact the Konnect Team on 0800 KONNECT (0800 566 632) for any queries related to SureMed.

# SureMed Electronic Service

SureMed service enables Doctors to send Patient data securely to Insurers using the _SureMed Insurance form_.

## Overall Process

This process begins with the Insurer placing a request using our SureMed system. A request is created and sent via the Healthlink system to the Doctor/Practice. The Doctor receiving this request matches this request to the particular Patient and completes the request by creating the SureMed Insurance Form on that Patient.

Once a request is completed, Doctor submits the request which sends the **ENCRPYTED DATA SECURELY** via the Healthlink system to the Insurer.
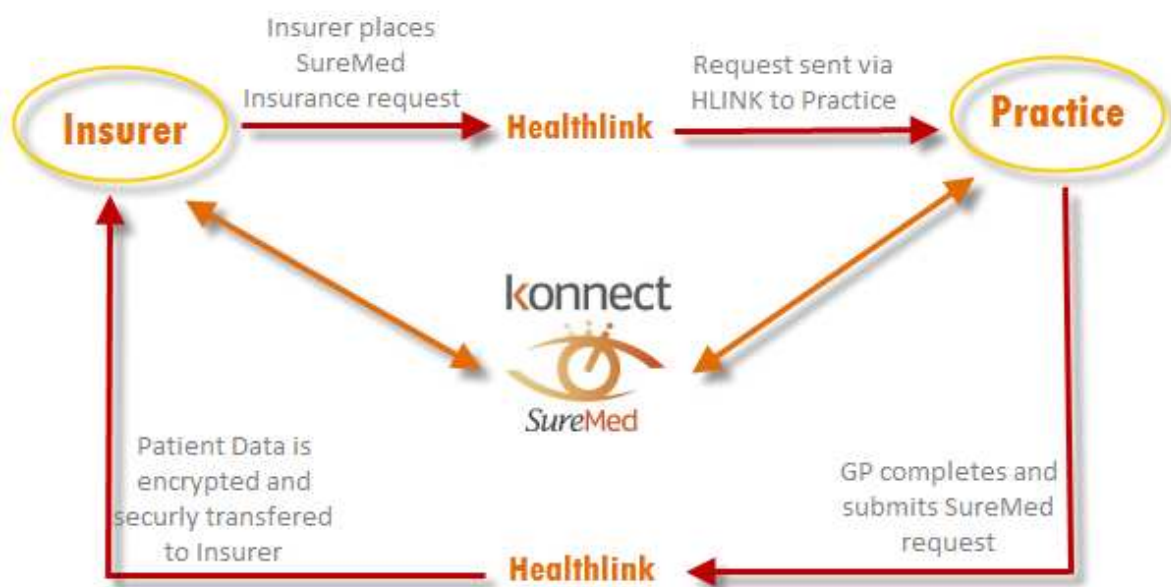


# SureMed Paper Service

SureMed Paper Service enables Doctors to complete insurance requests on paper in cases where a Practice has not been setup to use the SureMed service or the Practitioner prefers to continue with the paper process. Paper requests are received by Fax/Email depending on a Practice's preference.

Once a paper request is completed and received by Konnect, this is securely transferred to the Insurer.
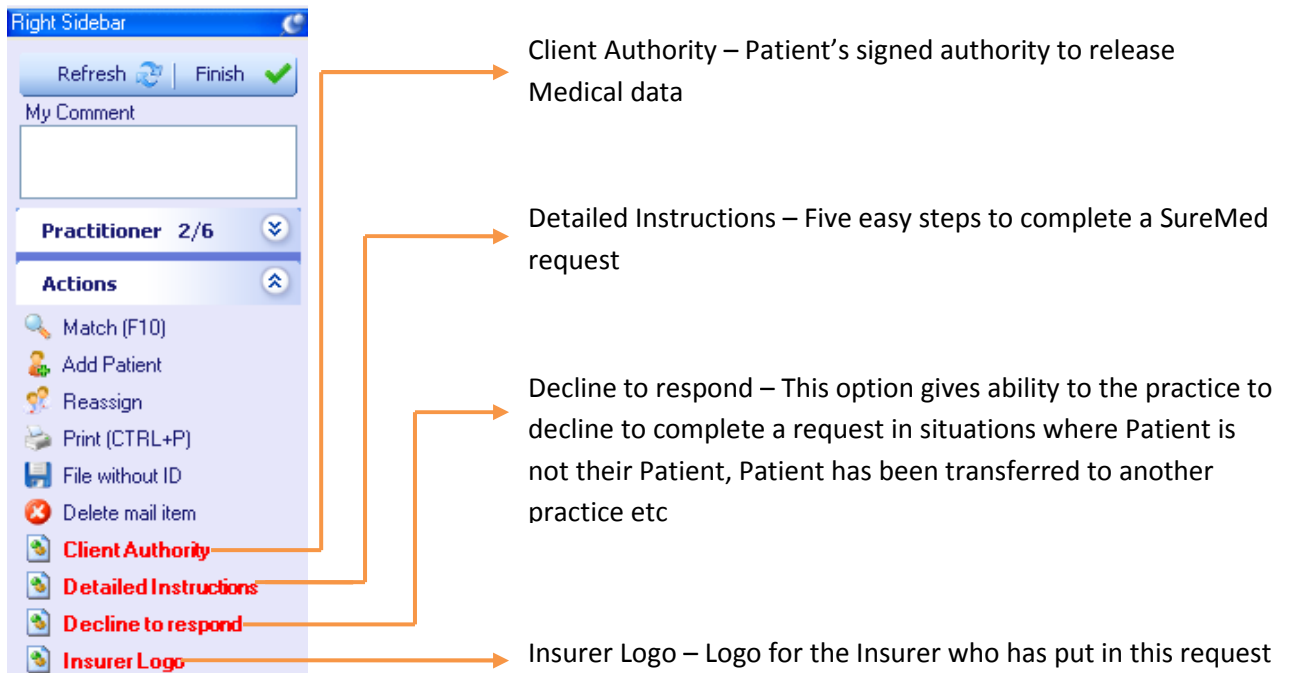
# SureMed Electronic Request in MyPractice

SureMed Insurance requests will appear in MyPractice alongside other mail delivered by Healthlink. SureMed messages will appear in the **Mail** screen for the Practitioner to whom the request was sent. The heading will display 'SureMed – Insurer – Request type'.



A summary of what the Insurer has requested will be displayed in the message as per below.
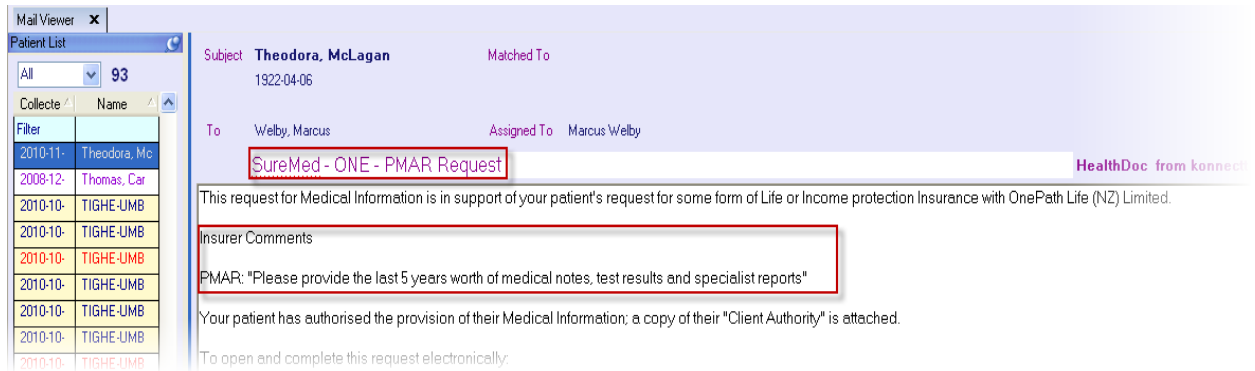


Attachments to the SureMed message will be displayed on the right hand side bar. These include Client Authority, Detailed Instructions, Decline to respond and Insurer Logo.



Client Authority – Patient's signed authority to release Medical data

Detailed Instructions – Five easy steps to complete a SureMed request

Decline to respond – This option gives ability to the practice to decline to complete a request in situations where Patient is not their Patient, Patient has been transferred to another practice etc

Insurer Logo – Logo for the Insurer who has put in this request

*HANDY TIP*: **Filter on Mail Viewer**

You can filter the Patient list on the Mail Viewer screen to display only SureMed requests.

Select 'Insurance' from the dropdown menu above the Patient list.
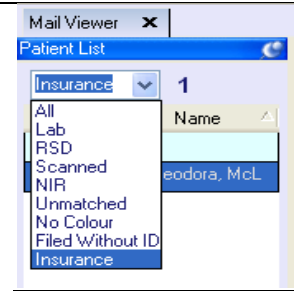
## Patient Matching

On the **Mail** screen, SureMed messages will automatically match the Practitioner in the same manner as lab results *however you will need to manually match the Patient.*

### To Match the Patient

👁 Click on the **Match** link from the right hand sidebar



👁 Patient List screen will open with the search results for that name
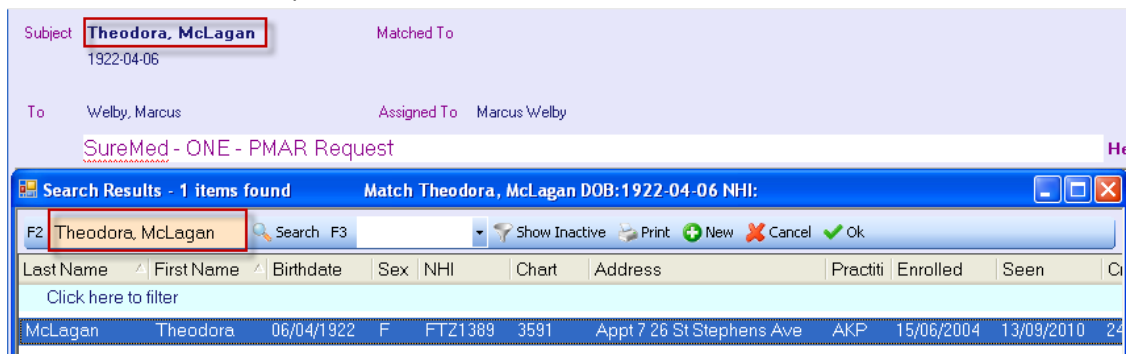


👁 Highlight the correct name and press enter or click on Ok



*NOTE*: *You need to 'File' the request against the Patient before you are be able to create the SureMed request*

## To File the request

👁 Click on the **File** link from the right hand sidebar



Filing the message will create a reminder task. Completing SureMed forms is discussed later under ***Completing SureMed forms*** section.

## *Practitioner Matching*

SureMed requests are matched to the Practitioner to whom the request is sent to. For any reason if this Practitioner is not available to complete the SureMed Insurance request, it can be re-assigned to another Practitioner in the **Mail** screen.

## Re-assign to another Practitioner

👁 Select the SureMed message and click on **Reassign** from the actions



👁 Select the Practitioner from Practitioner list and click on **OK** .
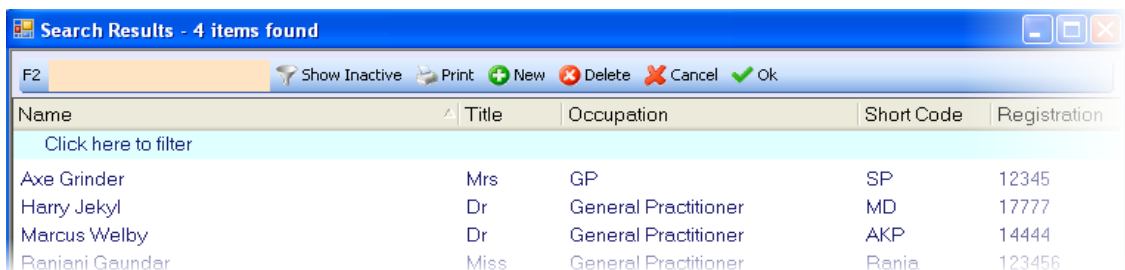
# Completing SureMed Forms

Once a SureMed request has been filed, a task is visible on the Practitioner's task list and within the Patient's Clinical Notes.
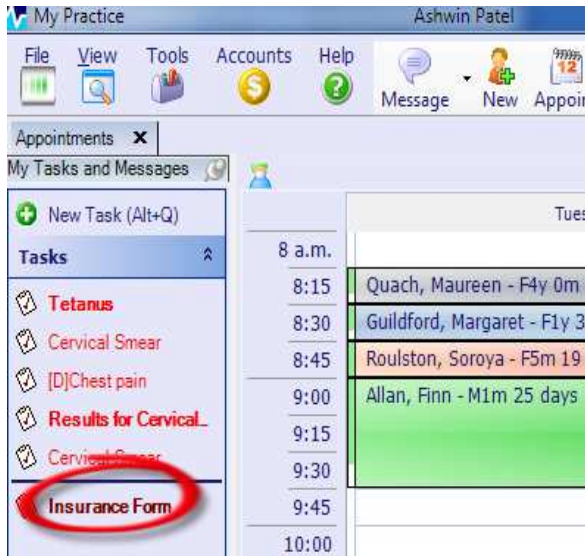


Once the Clinical Notes are opened, the task is visible in the Patient's task list.



Click on the task and select Open Form.
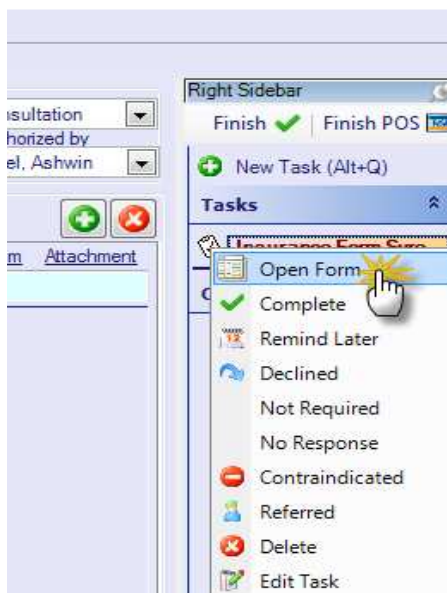
Note: Other attachments are viewable from the Notes Tab



Open the Note by clicking on the "+". Double click on attachments to view them



## Completing a SureMed form

### Filling in the Insurance form

👁 Select **Open Form** from the Insurance Form Task or double click on the **Insurance Form** in the old notes. The SureMed Insurance Form pre populated with the patient's data will open.



### Buttons on the form

**Collapse All/Expand All** – Allows sections within the form to be hidden/shown

**Close** – Closes the form without sending it to SureMed
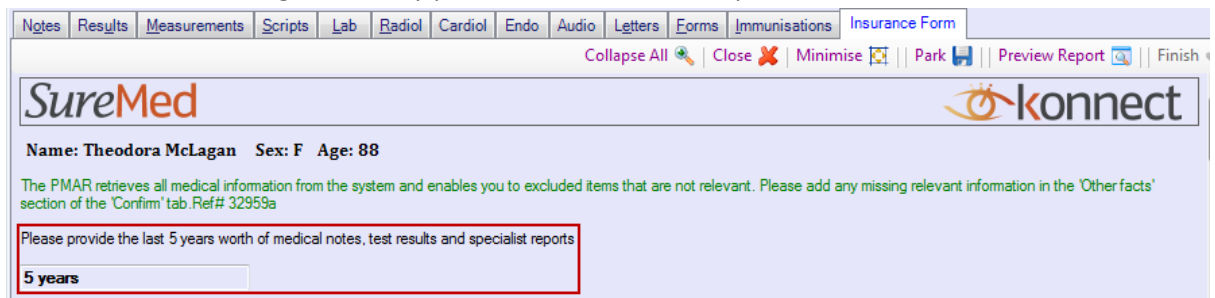
**Minimise/Maximise** – Minimises and Maximises form size

**Park** – Saves any changes to a partially completed form. These changes will be present when the form is reopened

**Preview Report** - View the document as it will be seen by the insurers (PDF Format)

**Finish** – The 'Finish' button cannot be selected until all mandatory sections are complete. Once pressed, the PDF report will be sent to SureMed via Healthlink.

👁 **Header section:** This section displays what the request is for including the comments from the Insurer and showing the history period of Patient data requested.
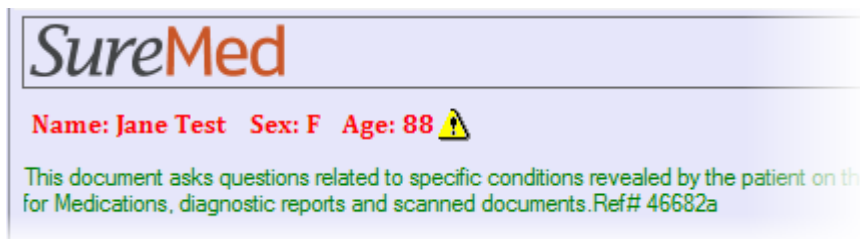


You can see the Patient's details as sent by the Insurer with the form. If the current Patient's details do not match exactly, this  be highlighted in **red** with an alert ( ⚠ ) symbol next to it.
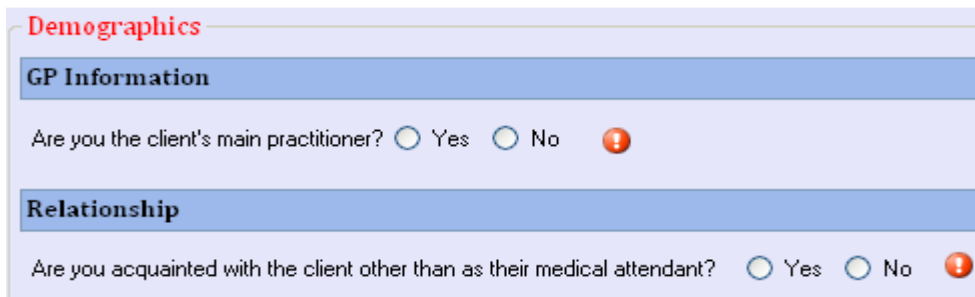


👁 **Demographics section:** This section has questions about GP information and Relationship both being compulsory questions.
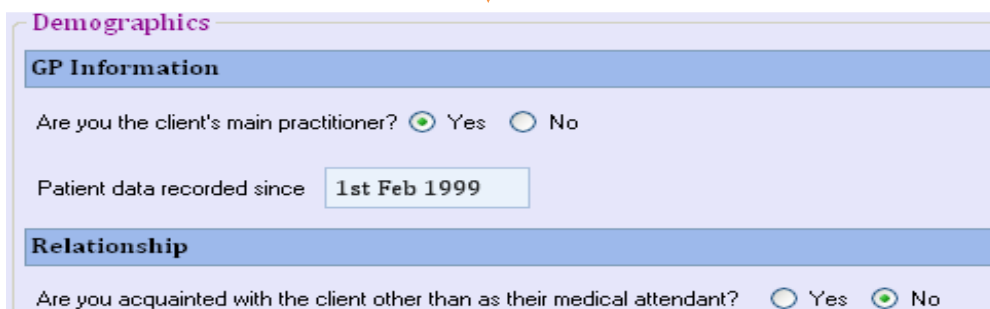


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*NOTE: Compulsory questions will have a red exclamation mark* 🔴 *,this mark  will disappear as the question is answered. Further questions can appear in response to answers to other  questions. If a section contains unanswered compulsory questions, heading of that section would be displayed in* **Red** *(e.g. Demographics heading in the first image).*

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 **Medical History section:** This section contains pre-populated Patient's clinical data for Current Problems, Accidents, Consultation Notes and Screening Terms (Measurements/Observations).

 Collapsed look for Medical History sections.

Click on Underlined text to expand/collapse sections.

If you do not wish to include an item in the report, un-tick the box besides that item. Click on <u>Include</u> to tick/untick all items in a list
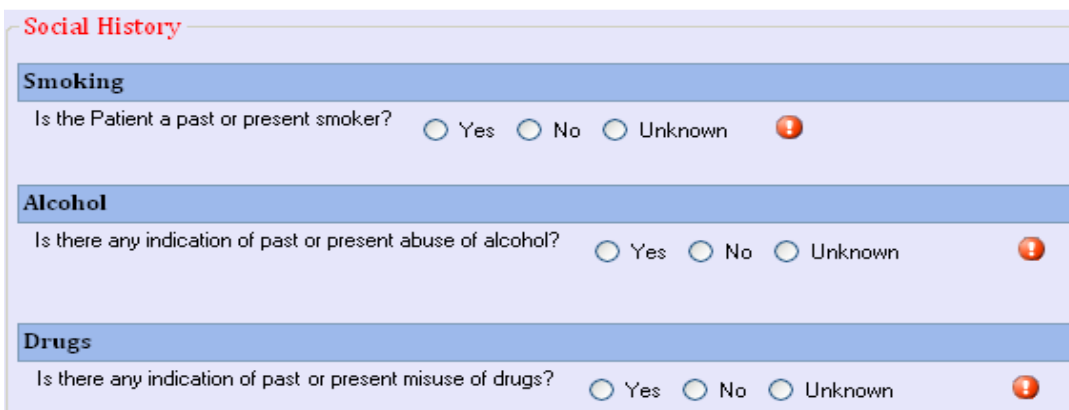


Consultation Notes can be edited on the form if necessary however these changes will not be saved back to MyPractice and will not be Parked.

 **Family History section**



 **Social History section**:

👁 **Medications section**: Patient's prescribed and regular prescriptions.

| Medications | | | | | |
|---|---|---|---|---|---|
| **Prescriptions** | | | | | |
| Date | Name | Quantity | Instructions | Comments | Include |
| 09/10/2009 | Aspirin 100mg | 90 | 1 tablet daily | | ☑ |
| **Regular Medications** | | | | | |
| Date | Name | Quantity | Instructions | Comments | Include |
| 05/04/2011 | Elocon Lotn 0.1% 50 ml | 2 | apply thinly once daily,stop after one week and | | ☑ |
| 05/04/2011 | Vesicare Tab 5 mg | 28 | one daily | | ☑ |

👁 **Documents and Reports section:** This section contains labs/radiology reports and attachments such as diagrams, photos or, images.

| Documents and Reports | | | |
|---|---|---|---|
| **Lab / Radiology Reports** | | | |
| Date | Title | Result | Include |
| 09/07/2009 | X-RAY | 2186834  For PATEL, A (13615)  Ordere… | ☑ |
| 03/07/2009 | Complete blood count | 0925293582540100  For PATEL, ASHWI… | ☑ |
| 21/05/2009 | Liver | 0925320033101000  For PATEL, ASHWI… | ☑ |
| 21/05/2009 | Renal and Electrolytes | 0925320033105800  For PATEL, ASHWI… | ☑ |
| 21/05/2009 | Complete blood count | 0925320033540100  For PATEL, ASHWI… | ☑ |
| 21/05/2009 | Proteins | 0925320033107000  For PATEL, ASHWI… | ☑ |
| 09/01/2009 | Complete blood count | 0912246982540100  For PATEL, ASHWI… | ☑ |
| 24/11/2008 | Renal and Electrolytes | 0812247062105800  For PATEL, ASHWI… | ☑ |
| 24/11/2008 | Complete blood count | 0812247062540100  For PATEL, ASHWI… | ☑ |
| 29/10/2008 | Proteins | 0812246360107000  For PATEL, ASHWI… | ☑ |
| **Attachments** | | | |
| Date | Title | | Include |
| 26/08/2010 | RSD:Patient Discharge | | ☑ |
| 08/08/2010 | Operation Note Orthopaedics PDF | | ☑ |

👁 **Confirm Section:**

**Confirm**

**Other Factors**

Is there anything else regarding this Patient that you would like to make the insurer aware of, not already covered elsewhere in your response?

◯ Yes  ◯ No       ❗

Does the electronic record cover the last 5 years?    ◯ Yes  ◯ No    ❗

**Payment Details**

| Service | Amount |
|---|---|
| PMAR | |
| Total | |

*Payment amount depends on type of request*

Deselect below for manual invoicing

☑ Standard payment terms:  On submission of this form, a confirmation email will be sent to your practice nominated address, and payment for the total above will automatically be made to your nominated account by Konnect Net Limited.

**Submitted By**

| Details | | Address | |
|---|---|---|---|
| Name | Marcus Welby | Street | 52 Gladstone Rd |
| Qualification | MB ChB, Dip Obst, MRNZCGP (Dist) | Suburb | Parnell |

**Other Factors e**nables you to add comments and confirm the duration of the data provided.

- Payment details section displays the invoice amount which will be payable on completion of this form. This amount is determined by the request type.

- Submitted By section displays the Practitioners details who is completing the form.

Leave "Standard payment terms" ticked to automatically generate an invoice on finishing this form.

*NOTE***:**  If you want to invoice manually, untick *the Standard Payment terms. Create your own invoice in the POS screen after finishing the form and closing the Clinical Notes*

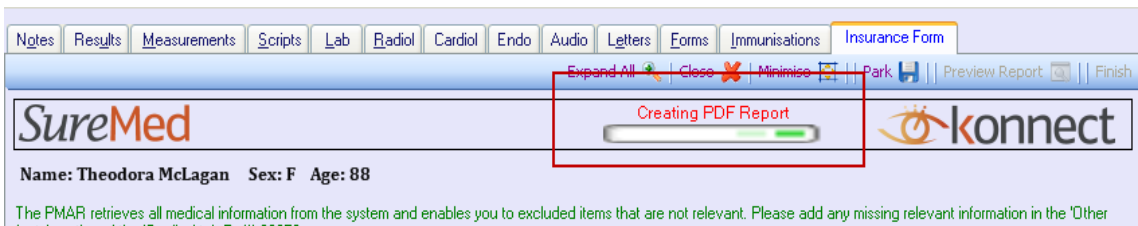## Previewing Report before Submission

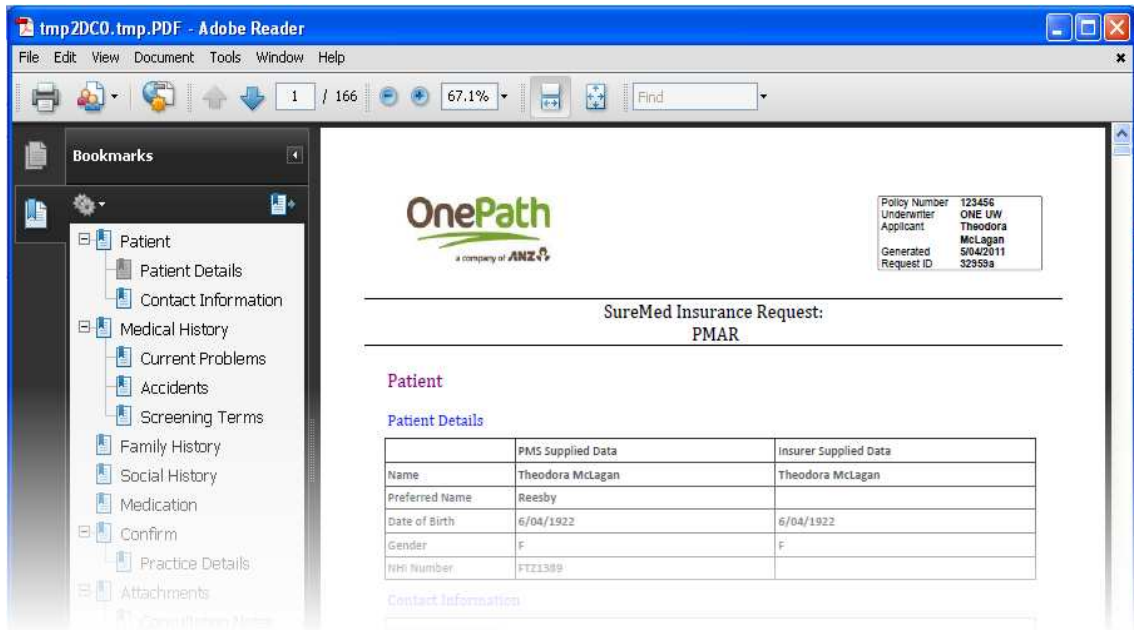Preview Reports at any time to see how the form will appear to the Insurers. To Preview report:

👁 Click on Preview Report button.

👁 A progress bar will be displayed at the top of the form however you have the option to continue working on the form.

👁 Once the report generation is completed, a preview of the report would open in a PDF format.

Continue editing the Form until satisfied, proceed to the submission process.

## Submitting the Form

Once all compulsory questions are answered the **Finish** button is enabled.



👁 Clicking on the **Finish** button opens the **Insurer Comments**. This is another reminder of what the Insurer has requested for on the Insurance request.
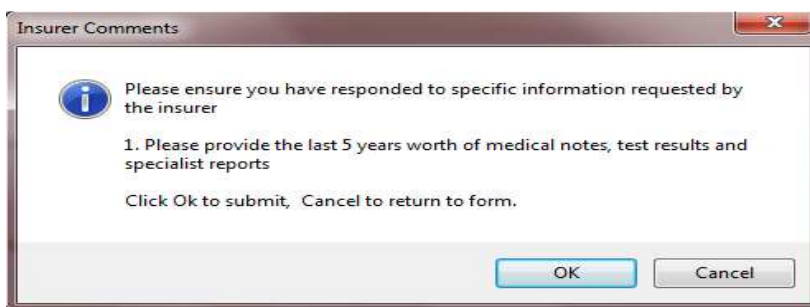


👁 If you have provided everything that the Insurer has requested for, click on **OK** button to continue with the submission process.

Submission of the SureMed forms will start. You may continue using MyPractice.

**Cancel** button will put you back on the form.

👁 A report is generated and saved to Patient notes once submission has been completed. Refer to the Completed SureMed report section below.

## Completed SureMed Report

Once Submission has been completed, a report is generated and is saved into the Patient notes as 'Submitted Insurance Form'.
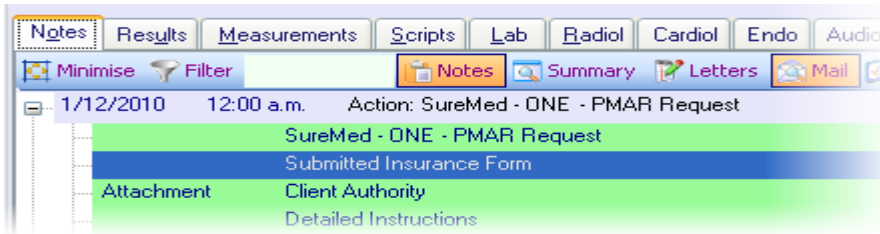


Double clicking on the 'Submitted Insurance Form' will open the report that has been sent to the Insurer.
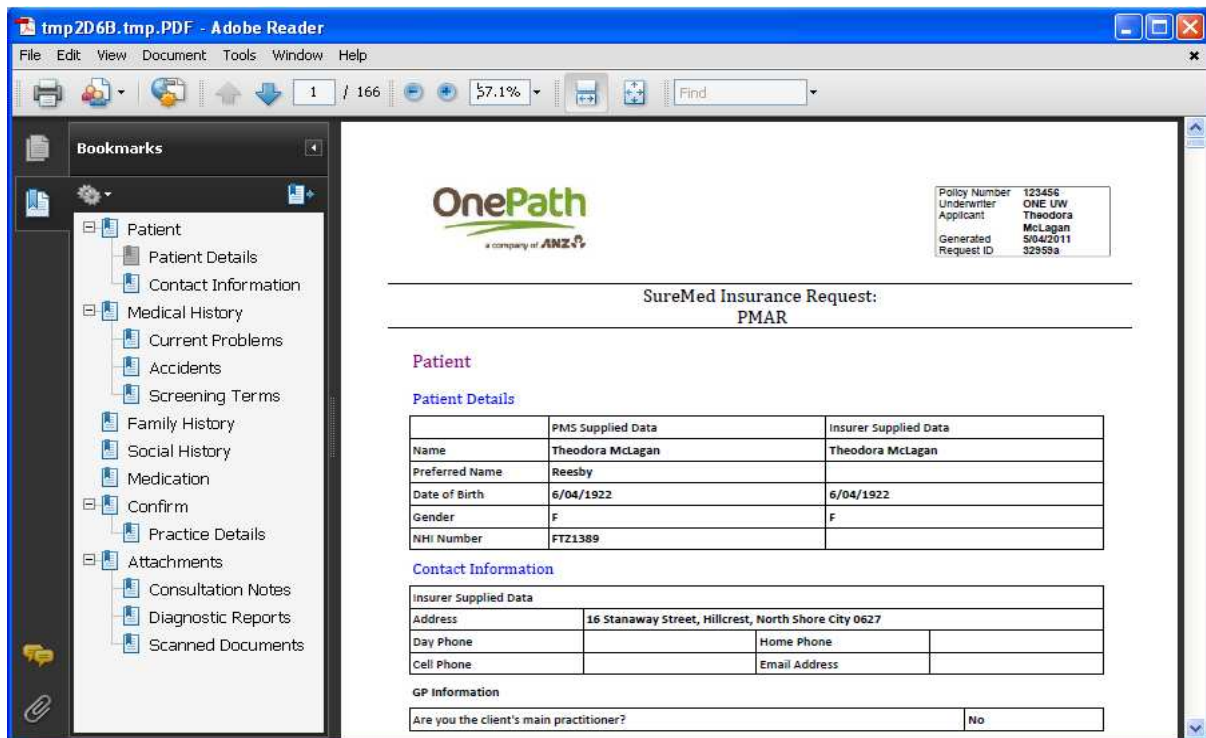


## *Parking SureMed forms*

With SureMed forms, you have the ability to save a partially completed form. Form gets saved to the Patient's Clinical Notes under **Notes** tab and will be displayed with a text of '**Parked Insurance Form**'. A task will be created to remind you of this parked form.

> HANDY TIP: **Dynamic forms**
>
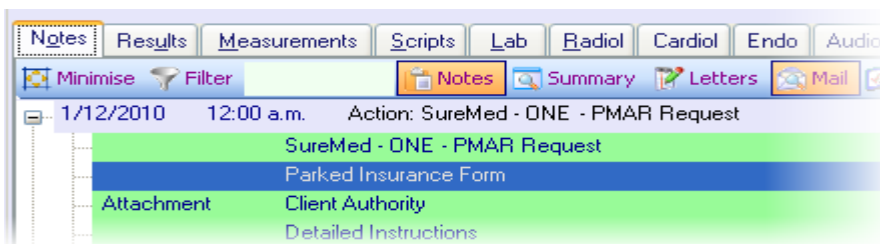> SureMed forms are dynamic forms. This means that after an Insurance form has been parked if new data is entered on Patient notes, this will be picked up when the Parked Insurance Form is re-opened.

# Insurance Task Reminders

For each Insurance request received and **Filed** against a Patient, an Insurance Task is generated. You can access the Tasks screen by clicking on the **Tasks** icon from the top menu.
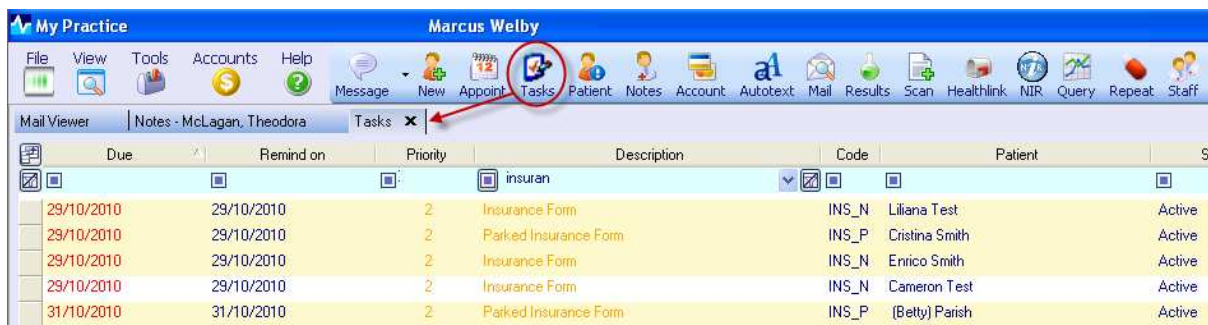


These tasks would update according to the status of the requests i.e. tasks description will be displayed as:

- Insurance Form – When the Insurance form is still pending to be worked on
- Parked Insurance Form – When an Insurance form is partially worked on and is parked to be completed later.
- Submitted Insurance Form – Task will be automatically completed after a successful form submission.

> HANDY TIP: **Insurance Task**
>
> Task screen will have all tasks from MyPractice. You can filter Insurance task by typing '**Insurance Form'** or by selecting '**Insurance Form**' from the dropdown in the **Description** filter to only search for Insurance forms tasks.
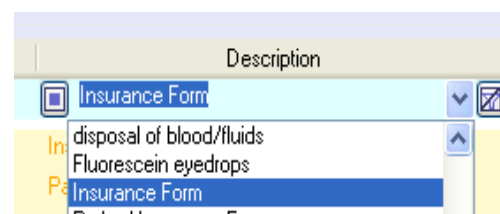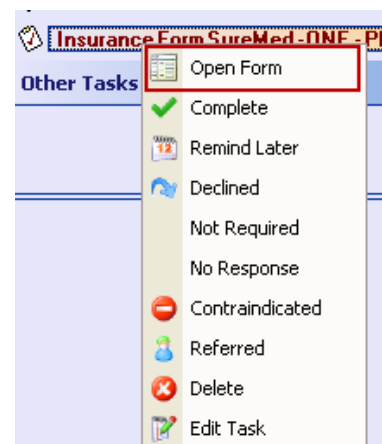


## Insurance Task on sidebar

Insurance Task can be viewed for the active patient on the Right hand side bar as well. Status of the task will reflect the progress of the form.
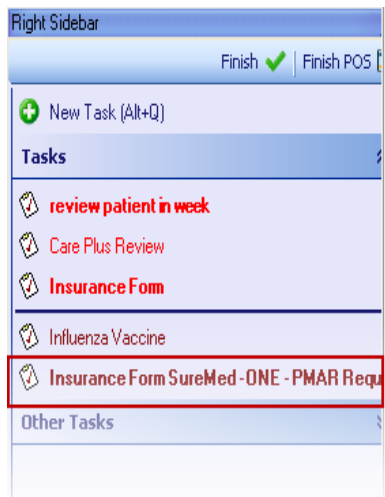
HANDY TIP: **Opening Insurance Form from Task**

Task on the right hand side bar can be used to open the form by right clicking on the task, and selecting **Open Form**

# Declining a Request Electronically

A SureMed Insurance Request can be declined electronically on cases where Patient is not a Patient at the practice or the practice does not have any Medical Information for the requested Patient.

This can be done at the very beginning when a request reaches MyPractice from the Mail Viewer screen or later from the Patient Clinical Notes if the request has already been filed.
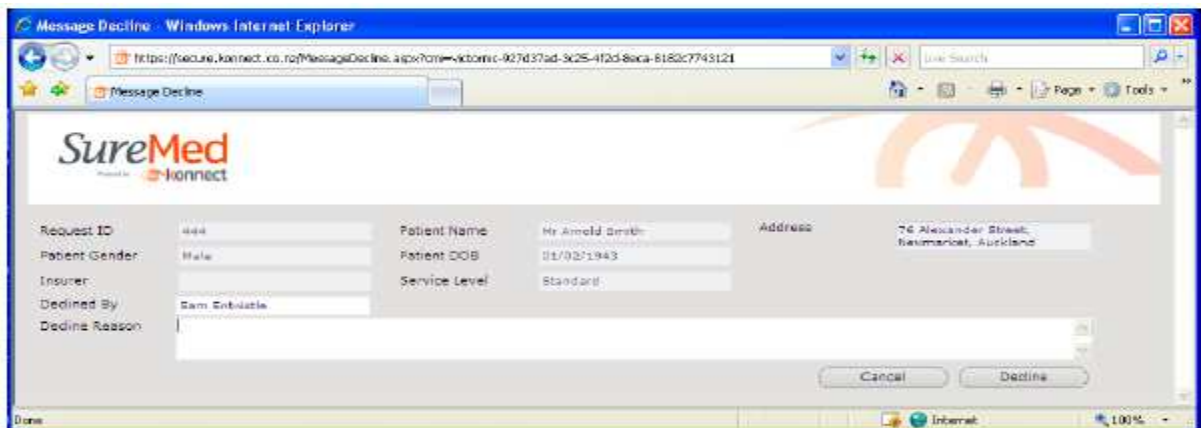
## Declining from Mail Viewer

- On the Mail Viewer screen, select the request you would like to decline.

- From the right hand side bar, click on the 'Decline to Respond' attachment

This will navigate to Konnect's decline webpage.

👁 Enter a '**Decline Reason'** and click on the '**Decline**' button.



## Declining from Patient Notes

Even when a request has been filed to a Patient, a Practitioner can decline to do the request from **Patients Clinical Notes**.

👁 From the **Notes** tab, click once on the Action item for SureMed request to open the message.

👁 Click on '**Decline to respond'** attachment. This will navigate to Konnect's decline request page.



👁 Enter a '**Decline Reason'** and click on the '**Decline**' button.

# Billing and Payment

All accounting items for Billing and Payment for SureMed service (Both Electronic and Paper service) are handled by Konnect. Once a request is completed, the invoice is received by Konnect and payment is made to the Practice by Konnect.

## *Billing*

👁 For SureMed Electronic service

i) Auto Billing - A Practitioner accepts the guideline price when doing the SureMed Insurance form by leaving the tick in '**Standard Payment terms'**.



With this type of Billing, an invoice will automatically be generated within MyPractice (under Accounts) and is *automatically sent to Konnect electronically*. A confirmation email for this will be sent to the Practice email confirming that the completed request and invoice has been received.



ii) Manual Billing – In a scenario where Practitioner has worked longer on a particular request or does not agree to the guideline price, the Practitioner has the option not to accept the '**Standard Payment Terms**' by un-ticking this.  *You will need generate a manual invoice in MyPractice and send it to Konnect either by post or secure fax*.

For SureMed Paper service

All paper requests will require manual invoices generated within MyPractice, printed and sent to Konnect along with the completed paper Insurance request.

# *Payments*

Payments for completed SureMed Insurance requests (Both electronic and paper) are done by Konnect Net Ltd.

For electronic requests where Practitioner has accepted the Standard Payment Terms, an invoice is electronically received and payment is done promptly.

For manual invoicing, payments made to practices when completed requests are received and processed.