Aboriginal and Torres Strait Islander Health Practice
Chinese Medicine
Chiropractic
Dental
Medical
Medical Radiation Practice
Nursing and Midwifery

Occupational Therapy
Optometry
Osteopathy
Pharmacy
Physiotherapy
Podiatry
Psychology

AHPRA

Australian **Health Practitioner** Regulation Agency

Instructions for generating billing and appointment data

Information for practitioners

May 2018

Genie

The following applies to all versions of Genie except version 7. Most sites currently use version 8.

Reporting capability

Genie is able to create customised reports using the 'Quick Reports' functionality for billing and appointment data. For appointment data the report would routinely include date and time of appointment, patient name. For billing data the report would routinely include date of service, item code, and patient name. Both billing and appointment data can be reported for an individual practitioner. The Quick Report functionality will also allow gender and date of birth to be included in the reporting parameters.

Practitioners may create the Quick Report themselves. Alternatively practitioner may call the Genie customer support line to request a report be created. Genie can send the report to the practitioner can be imported into the system as a saved report allowing this report to be generated quickly. Usually this is included in the free support provided by Genie for users.

Exporting reports

Practitioners using Windows based computers should export reports created into an Excel format and then save as a PDF from Excel. This will ensure that the PDF is able to be readily uploaded into AHPRA systems.

Practitioners using Apple Mac systems may export reports created directly to Adobe PDF.

Best Practice

The following applies to the BP premier, BP VIP, BP Allied and BP Titanium products.

Reporting capability

For appointment data the report would routinely include date and time of appointment, patient name. For billing data the report would routinely include date of service, date of invoicing, item code, and patient name. Both billing and appointment data can be reported for an individual practitioner.

Exporting reports

Practitioners should export reports created into an Excel format and then save as a PDF from Excel. This will ensure that the PDF is able to be readily uploaded into AHPRA systems.

Instructions for generating reports

Instructions on the reports available for BP premier products are available at the following link.

http://kb.bpsoftware.net/au/bppremier/lava/Content/Management/Reports/UsingReportsToPayProviders.htm?Highlight=report

To run a report using BP premier go to the main screen and click the following:

Management>>Report>>Services / payments.

Medical Director

The following applies to Helix, PracSoft and Blue Chip products

Reporting capability

Medical Director products are able to generate standard appointment and billing reports. For appointment data the report would routinely include date and time of appointment, patient name, comments, type of appointment, length of appointment. For billing data the report would routinely include date of invoicing, item code, amount and patient name. Both billing and appointment data can be reported for an individual practitioner.

The PracSoft and Blue Chip products are able to create customised reports for billing data which include gender and date of birth to be included in the reporting parameters.

Practitioners may create the custom reports themselves using the Data Insights Tool (PracSoft) or custom reporting (Blue Chip) functionality.

Exporting reports

Practitioners using the Pracsoft and Blue Chip products should generate reports as PDF text files and can also export reports to other formats. Practitioners using the Helix product should export reports into an Excel format and then save as a PDF from Excel. This will ensure that the PDF is able to be readily uploaded into AHPRA systems.