# MMEx User Manual

## Billing Administration

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# Billing Administration

## Prepare for Medicare Online Claiming

To integrate MMEx with Medicare Online Claiming, please contact the MMEx Helpdesk *(Ph: 1300 722 926)* to advise this.

Helpdesk will issue your organisation with a locationID (minorID).

- A location ID is eight characters long and will begin with the letters 'UWA' *(location IDs that start with 'PEN' will not work with MMEx).*
- Location IDs are not your postcode or name of your site.

Complete the following to send to Medicare:

- ARIF (Acceptable Referee Identification Form)
- Application for Public Key Infrastructure (PKI) Site Certificate
- Online Claiming Banking Details form
- Online Claiming for Medicare & DVA Provider Agreement (This form is only required if the provider has never submitted any electronic claims before. If you have submitted an electronic claim at a previous practice or using a different piece of software then this is not necessary for you to fill out.)
- Registered Medicare Australia Communities of Interest (CoI) Site Certificate.

For more information regarding these forms you can contact the Medicare help desk on 1800 700 199. Medicare will provide you (by mail) with a CD containing the certificate you ordered.

Send the following as an MMEx secure message to the Help Desk or as an email to help@mmex.net.au:

- files on this CD (labeled 'fac_encrypt.p12' and fac_sign.p12')
- the passcode for the certificate and
- a list of the providers listed on the 'Online Claiming Banking' form together with those provders' MMEx usernames

Click here to find out more about setting up your organisation for Medicare billing.

## Introduction to Billing Administration

# Video

**Bulk Billing Incentives**

If your organisation is eligible to claim Bulk Billing Incentives 10990, 10991 or 10992.

Check the box to enable automatic addition of incentives and select the relevant item number.

Additional validation of patient eligibility occurs at the time of billing. See here for details.

# Manage Ledgers

MMEx requires at least one Ledger to be setup. The recommended approach is a 1:1 relationship between ledger and bank account, so 1 ledger per bank account. However, you can have more than one ledger, depending upon your business rules and financial systems.

For example:

- 1 ledger per facility location (separate cost code per facility)
- 1 ledger for Medicare billing and 1 ledger for Non Medicare billing
- 1 ledger per provider ID

In the Organisation Centre, on the Billing Tab, click on **Manage Ledgers**

Billing Administration

**Org Centre: GP Test ISA Practice**

Users     Settings     Connect     Observation     Progr

Case Management     Referral     Reference Administratic

■ Manage Ledgers     ≣ Manage Billing Templates

You will see a table that contains all Ledgers that have been created at your organisation. This table can be sorted by Active and Archived ledgers and searched using keywords.
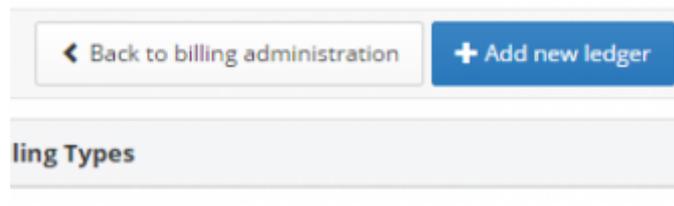
Ledgers

| Name ▼ | Edited By | Billing Types |
|--------|-----------|---------------|
| Test Ledger | Mr Daniel Reed | Bulk Billing, DVA, Patient Claim |
| GP Test ISA Practice | Mr Steven Hooper | Bulk Billing, DVA, Patient Claim |

To return to the Billing Tab, click on **Back to Billing Administration**

## Create a New Ledger

Click on the **Add new ledger** button at the right hand side of the screen.

‹ Back to billing administration     + Add new ledger

**ling Types**

- Give the ledger a name
- Select the Location Certificate for this ledger to enable Medicare claiming capability. *If the ledger will only be used for Private Billing, a Medicare Location Certificate will not be required.*
- Select the billing types that you want users if this ledger to be able to utilise.
  - Marking a billing type as the default will ensure that this billing type is preselected for all visits created
  - **NB: Individual billing settings will override the organisation default.**

- For each billing type selected, you can choose whether to allow users to select from:



  - MBS Items only
  - Template items only
  - Both

Click **Save** You will see a confirmation message advising that the ledger was saved, and the new ledger will appear in the table.



## Edit a Ledger

To edit a ledger, click on the ledger entry in the table and the properties page will open up.

# Managing access to ledgers

You can control access to your organisation's ledgers by adding specific users or organisations that you want to be able to record transactions against this ledger.

*Configuration examples:*

- *I want all users at my organisation to be able to see and use the same ledger*
  - Add your organisation name to the list of users
- *We have multiple clinics and each has it's own ledger. I want to have each of my clinic's ledgers visible and available for selection at all of my clinics.*
  - for each of the clinic ledgers that you want to share, add all of the other clinic names to the access list.
- *We have multiple clinics and each has it's own ledger. I want my clinics to only see their own ledger, but our finance and reporting team needs to see all of them so we have oversight*
  - Add the clinic name to the ledger, along with the users who will undertake activities such as reconciliation, reporting and oversight.
- *I want to have a ledger for each of my clinicians, that only they can see*
  - Create a ledger for each clinician and add only the individual user (and admin if required) to the user access list

In the Organisation centre, on the billing tab, click on **Manage Ledgers**.
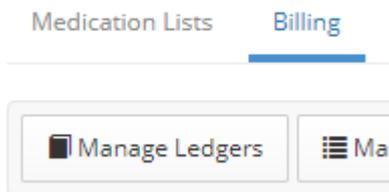


Select the ledger you wish to share In the User Access field, you will see you current clinic's name.



In the search box, type in the name of the clinic or user that you want to have access to this ledger. You will need to do the reciprocal sharing for the current clinic to see other clinic ledgers.

**NB: adding a clinic/organisation name, adds every user (who has access to billing) from that organisation.**

If the ledger is to be visible to selected individuals only, remove the organisation name and add the names of the individual users.

## Viewing different ledgers

In the billing module, you will see the list of ledgers that you have access to in the top right corner of the screen. It is important to ensure that you have the correct ledger selected. The default will be the ledger of the clinic that your current user account is linked to.
Select *Show all ledgers* to view information from multiple ledgers at once.
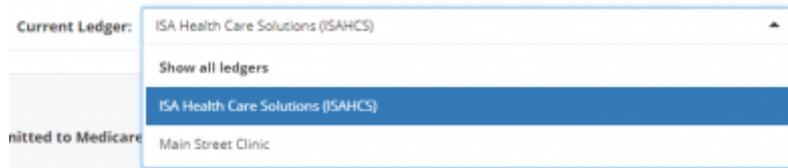
## Archiving a Ledger

To archive a ledger, on the Manage Ledgers page, select the ledger you wish to archive. Click on Archive. You will be asked to record a reason for archiving.
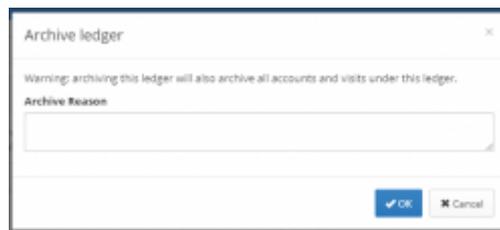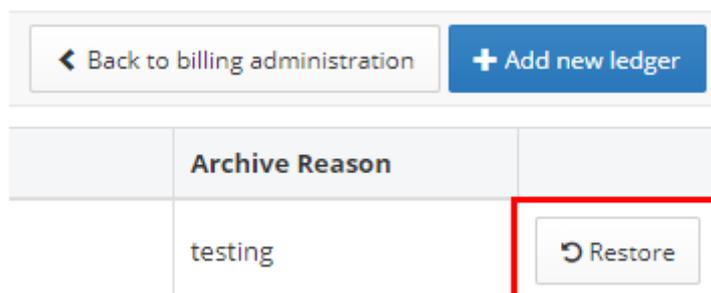
**NB: When you archive the ledger, all billing activity that took place on that ledger will no longer be visible in the patient record.**

To view archived ledgers, select *Show archived ledgers* in the drop down list on the ledgers page.
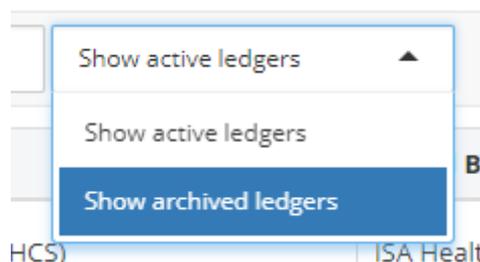
You will see a restore button for each archived ledger, click this to restore the ledger.
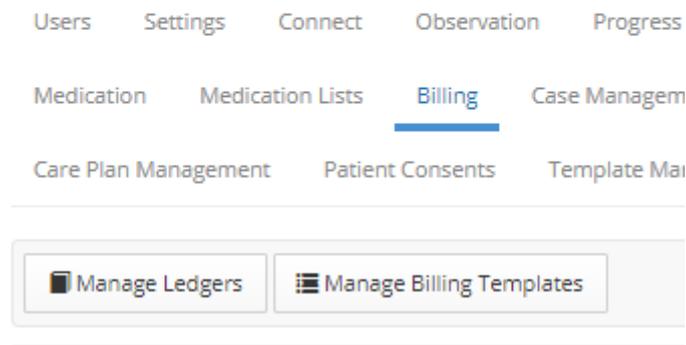
# Manage Billing Templates

Billing templates can be used to create a single custom billing item or to create groups of billing items that are frequently billed together. Users can then select templates for convenience and efficiency instead of adding one billing item at a time.

In the Organisation Centre, on the Billing Tab, click on **Manage Billing Templates**



You will see a table with all current templates listed by group.

**NB:** at the Initial implementation of the new billing module, all of your existing custom billing items will be in a group named "Imported Items". You will need to move them to billing groups if you wish to make searching for the items easier.

## Create a Billing Template Group

### In Manage Groups
Click on **Manage Groups** then, if you wish to create a new group, **Add new group**
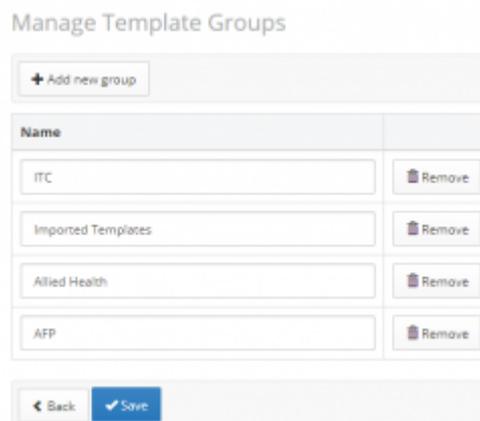


A new blank text field will open, enter the template group name here. To delete a template group, click the **Remove** button. To save your changes, click **Save**.

**In Templates**

You can also create a template group whilst adding a new template item by typing in a new template group name and clicking on the highlighted section under where you typed the name where "Add {entered group name}" is written. the new group name will only be saved when the billing template



is saved.

## Create a Billing Template

To create a new billing template click on **Add new template**.

Select the Billing Type that this template will be available for.

- Bulk Billing and DVA Billing will display MBS item selection options only.
- Private Billing and Patient Claim billing types will display both MBS items and the option to add new custom items

Complete all fields before saving the template. *NB: Validity dates may be left blank*



You may also create a new template group here by typing in a new template group name and clicking on the highlighted section under where you typed the name where "Add {entered group name}" is written. the new group name will only be saved when the billing template is saved.

**Group**



## Add MBS Items

The MBS item search field and the Advanced Search can be used to select an MBS item to add to the billing template. In the search field, type in the MBS code(s) you wish to add to the template.

## Add "Gap fee" Items

For a Private Billing item, select the MBS item you are billing for, modify the Amount and GST fields to reflect the amount charged above the MBS schedule fee.



## Custom Items

You may also define a custom item (an item that does not have an MBS code or price - for example: services delivered at a contracted price, orthotics, self-help books, nutritional supplements etc.
Click on **Add custom item**
Blank fields open up to allow you to define the item to your requirements.



# Set Billing Preference

## Patient Level
On the Patient Demographics page from the Billing Type drop down list, select the patient's default billing type.

When a visit is opened for the patient, this billing type will open automatically.

### Organisation Level

Billing preference can also be set at the Ledger level. Example: Organisations that only Bulk Bill can select this as the only billing type in the ledger they create. All visits created with this ledger will default to Bulk Billing.



# User Permissions

The following user permissions control access to the Billing module and it's features.

| Permission | What it does | Access Options |
|---|---|---|
| Billing Administrator | Allows users to manage billing settings including accounts, ledgers, templates as well as transfers | Allow, Deny |
| Access to Billing | Gives users access to the billing module in MMEx NB: Users MUST have this permission set to read or write in order for subsequent permissions to be effective | Read, Write, Deny |
| Billing Claims | Gives users the ability to view or update billing claims | Read, Write, Deny |
| Billing Invoices | Gives users the ability to view or update billing invoices | Read, Write, Deny |
| Billing Ledger Organisation View | This permission allows users to see all ledgers added to their organisation, instead of directly assigned to their user account | Allow, Deny |
| Billing Payments | Gives users the ability to view or update billing payments | Read, Write, Deny |
| Billing Quotes | Gives users the ability to view or update billing quotes | Read, Write, Deny |
| Billing Reports | Gives users the ability to view and export billing reports | Read, Write, Deny |
| Billing Visits | Gives users the ability to view or update billing visits | Read, Write, Deny |
| Delete Claims | Gives users the ability to delete claims before they are submitted | Allow, Deny |
| Void Payments | Gives users the ability to void payments | Allow, Deny |
| Write off Debt | Gives users the ability to write off invoice debt | Allow, Deny |