

Institutions (Other than HIC Online)

The following instructions are for running Medicare or DVA manually.

During the course of day, Accounts are raised per Patient for items being Bulk-Billed by way of the '**Charge To**' column to Institutions or Third Party companies. These might be companies that you supply safety specs to, or do visual screening. To do this, you simply select the Institution in the '**Charge To**' field on the account.

If you intend to "Batch" the Institution data, ensure that the correct **Optometrist** and **Branch** are showing on the Account. DVA and Medicare are done like this, but most other institutions will be handled differently (see section below). If you are Batching, you can only batch by Branch and Optometrist, and Optomate uses the details on the Account to match up when batching. Most Institutions are not suited to Batching. For these, you can print an Invoice at the time of the sale, and a Statement at the end of the month.



Step A – Batching Method

Go to the Institutions screen by clicking on the icon on the main screen.

1. Click on the [Preview Batch] button at the top of the screen. Select the correct **Institution**, **Optometrist** and **Branch**, and then click on Preview. Check that the list on screen is correct.

If you have anything incorrect on the list, cancel the report and return to the Patients' file and correct the corresponding Account or Patient details.

Preview the Batch again to ensure everything is correct. Once you are happy, print and keep with DB4 forms or Account printouts, which you retain in the practice for future Auditing/history purposes.

2. Click on the [Create Batch] button at the top of the screen. Select the correct **Institution**, **Optometrist** and **Branch**. A Claim Number will be allocated, or overwrite this number with an alternate number, such as the one given from your Healthpoint unit (if alternatively used in your practice) or the number on the orange Medicare Summary form. Click [OK] and the Batch will be created.

Step B – Receiving Payment for a Batch

1. Click on the [Receive Batch Payment] button at the top of the screen. Enter the Batch number and click [OK].
 - ▶ If you have the full payment without alterations, select correct payment type (eg. Eftpos) and click on [Receive Full Payment], answer "Yes" to pay and "Yes" if you want the payment to appear on today's Banking.
 - ▶ If you need to alter a batch, select correct payment type (e.g. Eftpos) then select Make Adjustments. Highlight the entry that needs changing, and click the [Part Pay] button at the top of the screen.

Change to the correct item code and amount, then click [OK].

When the totals are correct, click [Receive Batch] then "Yes" to update banking if you want the payment to appear on today's Banking Deposit Slip.

Modifying a batch after creation, but before payment received

The first step is to remove an item from a Batch to enable you to modify the account for re-submission. When this step is performed, the Patients' Account will become an 'Outstanding Institution Record' along with any other un-batched items for the day.

Note: If you want this item out on its own (i.e. for re-entry back into the original Batch) do step 3 AFTER creating today's batches, and BEFORE any new Accounts for consultations are raised.

1. Click on the [Adjust Batch] button at the top of the screen. Enter the Claim Number and click [OK]. Select any item that needs removing from the current Batch then click [Remove]. Once you are done, click [Save] then answer 'Yes' to "Are you sure you want to make the adjustments to the Claim". You can now go the Account and make the necessary changes.
2. If re-submitting in a new batch, simply follow **Step A** above. It will now appear updated on today's list along with any other batches ready to be claimed.
3. If re-inserting into an existing Batch, click on the [Create Batch] button at the top of the screen. Again select the correct **Institution**, **Optometrist** and **Branch**, but now enter the Claim Number originally used. Optomate will prompt you to confirm, then select [OK] and the original Batch will be updated with the new addition.
4. If you would like an updated report of the Batch, go to: **Reports > Institutions > Batch Report**.