Group Invoicing and Reporting Changes

BUPA Invoice & Reporting Requirements

BUPA have recently introduced new changes to the information required on invoices submitted to them and also to the statistics that they may ask you to provide. Even if you do not work with BUPA, the new Group report works with other groups so will be a useful addition to your TM2.

To help make your life easier, we have added new functionality in the September 2009 TM2 update that will provide the correct information on your invoices to BUPA, and also make providing statistics quick and easy.

Obviously the information on invoices and the statistics generated by TM2 will be accurate providing the correct information is input and the system is set up properly, as set out below. ***So please read this carefully to ensure you set up TM2 properly, which will make this new functionality work smoothly.***

Due to the various different ways that our users have set up TM2, there are changes that YOU will need to make to your TM2 to ensure it works properly.

INVOICES

BUPA now require certain reference codes to appear on their invoices. TM2 now has a new invoice template which meets these requirements. Please refer to page 9 of the release notes to ensure the Customer Group you use for BUPA is set up to use this new template.

In addition, you will need to either create the following consultancy items and use them with your BUPA Customer group, OR update your existing consultancy items that you use with your BUPA group to include the following information in the **description field**. These descriptions are also used to classify treatments according to sub speciality, which is picked up by the new report that provides the BUPA statistics.

IF THESE CONSULTANCY ITEMS ARE NOT SET UP CORRECTLY, THE INVOICE AND REPORT WILL NOT WORK CORRECTLY, SO PLEASE ENSURE THIS IS SET UP WITHIN YOUR TM2, AND USED APPROPRIATELY WHEN BOOKING APPOINTMENTS. PLEASE REFER TO THE TM2 HELP FILES FOR HOW TO SET UP CONSULTANCY ITEMS FOR CUSTOMER GROUPS.

AA360 Initial Musculoskeletal Physiotherapy
AA361 Follow on Musculoskeletal Physiotherapy

AA350 Initial Vestibular Rehabilitation
AA351 Follow on Vestibular Rehabilitation

AA352 Initial Female Health Physiotherapy
AA353 Follow on Female Health Physiotherapy

AA354 Initial Neurology Physiotherapy
AA355 Follow on Neurology Physiotherapy

AA356 Initial Chest/Respiratory Physiotherapy
AA357 Follow on Chest/Respiratory Physiotherapy

AA358 Initial Hydrotherapy
AA359 Follow on Hydrotherapy

AA362 Initial Domiciliary
AA363 Follow on Domiciliary

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NEW CUSTOMER GROUP REPORT

There is a new report within TM2 called Practice Group Activity Stats which can be run for any group, however will provide the statistics required by BUPA. If you use multi location within TM2, this report will be found in the 'Central' reports folder. Alternatively if you do not use multi location it will be found in the 'Diary' folder.

This report is very powerful and comprehensive, giving an excellent summary of the work your clinic does on behalf of customer groups. As the report is providing a very detailed set of statistics, it is important to understand what the different figures mean, and how they are calculated. Some statistics do require the TM2 Touch module, which have been marked.

The report can be found under the 'Reports' section of TM2. If you have multi location it will be located under the 'Central' folder otherwise it will be found under the 'Diary' folder.

Below is an explanation of the different areas reported on and how the figures are calculated:

Appointments Breakdown

A breakdown of the number and types of COMPLETED appointments recorded in the TM2 Diary.
- Appointments of any other status (booked, arrived, DNA, cancelled) are not included.

Group Initial field
Appointments created as the 1st appointment of a New Case for the selected Group.

Group Follow-Up field
Appointments created as Follow-up appointments (ie: Appointment belongs to an existing Case) for the selected Group.

Group Total
Combined total of Group Initial field and Group Follow-Up field.

Location Total field
Total of all completed appointments in TM2 Diary for the Location.

Group % field
Group Total as a percentage of Location Total.

Case - Waiting Times

Displays the Minimum, Maximum, and Average Time in Days between Patient Referral Date and Case Admission Date.
- Note - If many case referral dates are the same as admission date, this can result in average wait time being 0

Total Case field
The total number of New Cases OPENED within the specified Date Range for the report, for patients who were linked to the selected Group at the time of Case creation. This uses the Admission Date of the case as the defining criteria.

Cases with Admission & Referral Dates field
The number of Cases from Total Case field that have a value for both Admission Date AND Referral Date (BOTH need to be populated) in the Case Notes.

Average Time between Referral & Admission field
The average time in DAYS between Referral and Admission dates for Cases matching the criteria of the Cases with Admission & Referral Dates field.

Case – Referrals

The number of Cases that have a Referrer set in the Case Notes (Referrer Field in TM2 Case).
The TM2 Referrer - This will be a Medical Contact that is stored in TM2, under Medical Contacts, the Referrer first needs to be added here before they are available in the Case Notes.

Total Cases field
Total Cases as in the Case - Waiting Times section.

Cases Referred field
Number of Cases, from Total Cases field, that have a Referrer selected in TM2.

Referred Cases % field
The Cases Referred field as a percentage of Total Cases field.

Referrals Breakdown

Of the Cases that have a Referrer set (Referred Cases field from Case - Referrals section), a percentage breakdown of whether the Case Referrer is a GP, Consultant or another Physician.
The Referrers status is recorded in the Medical Contact record for the Referrer, in the Medical Contacts Section of TM2, here there is a drop down menu called Category.
The options available from this drop down menu are customisable from the TM2 Options Menu (found under the Tools Menu), under LookUps & Labels - Medical Contact Types (From the Drop Down menu)

There are special requirements for what these values must be like in order for the report to pick them up correctly.
Any Referrer, who is to be classified as a GP, must have the words "General Practitioner" OR "GP" OR "G.P." in the category name.
Any Referrer, who is to be classified as a Consultant, must have the word "Consultant" in the category name.

With regards the "General Practitioner" and "Consultant" categories, you can have other words in the category if you wish, ie: General Practitioner - Males, General Practitioner - Females, Consultant - Neurologist, Consultant - Radiologist
But the common words "General Practitioner" or "Consultant" MUST be present, any Medical Contacts without these words in their category, will be classed as "Other".

NOTE - this is NOT the case for the other two GP categories, if you are using these as your category description the category MUST BE "GP" or "G.P." only, otherwise they will be classed as "Other"

NOTE - If you already have your GP or Consultant Categories setup for Medical Contacts, and they do not conform to the requirements outlined above, you will need to ADD NEW categories that conform,
AND update the Medical Contacts record in TM2 to reflect the New Category .
How to Do:
1. Tools Menu - TM2 Options - LookUps & Labels - From the Drop Down Menu Select Medical Contact Types - Add New Category
2. Open the Medical Contact Record and change the Category Drop Down Box to your New Category

% GP Referrals field
Number of Cases where Referrer has a (Medical Contact) category that CONTAINS the words "General Practitioner", OR the Category Value = "GP" OR the Category Value = "G.P.", as a percentage of Total Cases with Referrers.
ie: Cases Referred field from Case - Referrals section

% Consultant Referrals field
Number of Cases where Referrer has a (Medical Contact) category that CONTAINS the word "Consultant", as a percentage of Total Cases with Referrers.
ie: Cases Referred field from Case - Referrals section

% Other Referrals field
Number of Cases where Referrer has a (Medical Contact) category that DOES NOT CONTAIN the words "General Practitioner" OR the word "Consultant", AND the Category Value DOES NOT EQUAL "GP" AND the Category Value
DOES NOT EQUAL "G.P.", as a percentage of Total Cases with Referrers.
ie: Cases Referred field from Case - Referrals section

Financials

Group Billed field

Group Invoicing and Reporting Changes

A calculation of the total value of BILLING ITEMS created against the selected Group within the specified Date Range, based on Billing Item Date, this includes both invoiced AND uninvoiced billing items.

Group Income field
A calculation of the total value of PAYMENTS taken from the selected Group within the specified Date Range, based on Income Date.

Location Income field
A calculation of the total value of PAYMENTS taken at the Location as a whole within the specified Date Range, based on Income Date.

Group Income %
A Calculation of Group Income field as a percentage of Location Income field.

Case Auditing ** REQUIRES TM2 TOUCH**

Need to turn on case auditing in TM2 Options – advanced configuration – TM2 Touch – **Enable clinical auditing of cases – True.**
In diagnosis section of Case, open **Clinical Audit** section, check the "Case Audited" check box.
This enables the Close off Audit button that marks the case as audited – please refer to page 14 of the Release Notes for an explanation of how this should be used.

Standard Care Pathway Followed ** REQUIRES TM2 TOUCH**

Follow same steps as Case Auditing but also check the "Standard Pathway Followed" checkbox – please refer to page 14 of the Release Notes for an explanation of how this should be used.

Onward Referral

In the Discharge Section of case the **Discharge Status** will be either:
"Referral Back To Source" **OR** "Referred Back To GP/Consultant".
(These are standard default values that come with TM2 for this drop down)

Group Invoicing and Reporting Changes

Sessional Average by Sub-Speciality

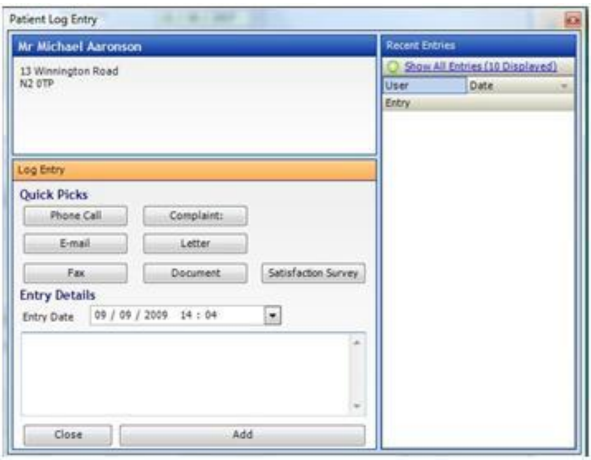
This is calculated by using the stock item description of the appointments linked to the case. See the Invoices section on page 1 for details of how to set up the appropriate stock items.

Satisfaction Survey Completion

Patients need to have had an appointment for the group (BUPA etc) within the date range selected and also have a record in their patient log that has the text "Satisfaction Survey".
To do this, click on the 'Patient Log' tab on the top right hand corner of the patient's record, click on 'Log Options' and then click on the 'Satisfaction Survey' quick pick. See Patient Log screenshot below.

Patient Complaints

Patients who have had an appointment for the group (BUPA etc) within the date range selected and also have an entry in their patient log that has the word "Complaint". The log entry date must also be within the report date range
To do this, click on the 'Patient Log' tab on the top right hand corner of the patient's record, click on 'Log Options' and then click on the 'Complaint' Quick Pick. See Patient Log screenshot below.



Patient Log with 'Satisfaction Survey' and 'Complaint' Quick Picks