

ENABLING THE SPREADSHEET:

The Spreadsheet contains a small amount of code to enable the tick boxes, sort, check, print and clear the form. To make this code work, Excel asks you to enable macros. When using the form for the first time, you might have to change your macro security:

Excel 2007:

- icon, click on:
 - ◆ [Excel Options]
 - ◆ [Trust Center]
 - ◆ [Trust Center Settings]
 - ◆ Macro Settings
 - ◆ ☉ Disable all macros with notification
 - ◆ [OK] [OK] – **Close and reopen the spreadsheet**
 - ◆ Or enable macros each time you open excel:
 - ◆ A Security Warning will appear if you do not change your Trust settings: “Security Warning Some Content has been disabled”
 - ◆ [Options] ☉ Enable this content
- **If using Excel .xlsx, the Spreadsheet should be saved as an .xlsm document.**

Excel 2002 – 2003:

- From the Toolbar, click on:
 - ◆ Tools
 - ◆ Options
- From the Message choose:
 - ◆ [Security]
 - ◆ [Macro Security]
 - ◆ [Security Level] ☉ Low (*no warnings*)
 - ◆ [OK] [OK] – **Close and reopen the spreadsheet**
 - ◆ Or enable macros each time you open excel:
 - ◆ [Security Level] ☉ Medium

ENTERING PATIENTS ONTO THE SPREADSHEET:

Patients are entered in the **PATIENT DETAILS** section. Enter the data according to the columns.

- ◆ *An existing patient list can be transferred from excel or similar providing the column sizes are the same.*
- ◆ The patient name should be entered firstname then surname (as usually appears on the claim form)

N.B.: Patients entered/changed will automatically be sorted in alphabetical order (firstname then surname). This avoids a previous bug on the spreadsheet.

- ◆ Type an X for either male or female
- ◆ The GP’s name should be entered as initial and surname
- ◆ If the GP’s provider number is less than 8 characters, prefix with a 0.

Non current patients can be highlighted by changing their colour or font. Alternatively, you can delete or overwrite the patient details.

ENTERING SESSION DETAILS:

Once the Organisation and Mental Health Nurse details have been completed – you will not need to do this again. **You need only complete the yellow highlighted sections:**

- Fill in the Session information:
 - ◆ Type in the time
 - ◆ Tick either the AM or PM box
 - ◆ The session number will be your session number for that week, i.e. between 1 and 10
 - ◆ Type in the date of session
 - ◆ Type in the suburb
 - ◆ Type in the postcode
- ◆ Assuming the patient details have been entered, you can either use the drop-down box to find the patient or you can type in the patient’s full name. If the patient’s name is not typed correctly, you will see a message box.
 - ◆ Either click [Retry] and type in the name again, or [Cancel] and pick from the drop-down list (click to select). The patient details will then be populated along the line.
 - ◆ If the patient name does not fit the column, right click and format the cell – tick Shrink to fit.
 - ◆ Click on either Yes or No in the Face to Face consult column.

CHECK FORM:

After completing the session and patients details, please click on the [CHECK FORM] button. This will sort the patient details and check for any session and patient details not completed. If something has been missed, a message box will appear with the error, i.e. the face to face tick box has not been ticked. Please continue checking until you get the message “Data entry OK – Please go ahead and Print/Save”

PRINT FORM: (Save to .pdf)

Click on the [PRINT FORM] button and the Print Options box will appear. Choose your default printer if you want to print the form to hard copy. Choose the .pdf printer to ‘Save’ the form, choose where you would like to save it, and give the form an appropriate name, ie “MedicareForm_date_session”

Excel 2007 - .pdf: Click on the [Microsoft Icon] then the arrow after [Save As ►] and choose [PDF or XPS], the Save As box should be .pdf, save as above.

SAVING / EMAILING THE SPREADSHEET:

If you want to email the spreadsheet, you will need a .pdf writer as Excel will not save as a Word document. Excel 2007 has a .pdf writer built in, but otherwise one can be downloaded free from the internet, which will install as a printer. You can of course save to Excel.

CLEAR FORM:

Click on the [CLEAR FORM] button to clear the session and patient details from the form. To clear one patient’s details, click on the drop-down box and scroll down to a blank line and click.

HONOS:

Enter the date of referral under [Date]. The 3 month review date will appear in the [HoNOS] column. When this date is reached “Overdue’ will appear in the [Overdue] column. The [Date] can be reset again once the review has taken place by retyping the [Date].

QUICK GUIDE

- **Enable macros:**
 - Every time on open (unless you have changed your macro settings)
- **Organisation Details and**
- **Nurse Information**
 - Only needs completing once
- **Entering/Editing Patients:**
 - Click [Patient Details] or navigate to
 - Add in Patient details
- **Session Information:**
 - Complete highlighted yellow areas
 - Tick if face to face, or not
- **[CHECK FORM]**
 - Click before printing and correct any messages until “Data entry OK”
- **[PRINT FORM]**
 - Print to your usual printer
- **[SAVE FORM] – FOR EMAIL**
 - Save/Print to .pdf
 - If saving – use a useful name, i.e. [MHNurse]_[date]_[session]
- **[CLEAR FORM]**
 - Clears the form
- **HELP**
 - Toggle between Medicare Form and Help Form by clicking on bottom left tabs
- **IF ALL ELSE FAILS – READ THE FULL INSTRUCTIONS**

The Mental Health Nurse Incentive Excel spreadsheet is provided by Rose Burns and PGNP, and may be freely distributed, provided that no charge is made, and that the disclaimer below is always attached to it.

The spreadsheet is provided as is without any guarantees or warranty.

Although the author has attempted to find and correct any bugs in the spreadsheet, the author is not responsible for any damage or losses of any kind caused by the use or misuse of the program.

The author is under no obligation to provide support, service, corrections, or upgrades to the program.

However, if you have any suggestions or do find an error, please email: r.burns@pgpn.org.au

N.B. Medicare approves the use of PGNP's template.

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MENTAL HEALTH NURSE INCENTIVE PROGRAM



A GUIDE TO USING THE EXCEL MEDICARE CLAIM FORM