MyPractice Services Setup Guide

Before you get started

You will require the following from your PHO before you can complete these instructions

- The **Description** of the Service Code(s) you are adding**.**
- An **xml** file containing the Service Code information

You should make sure that you have saved the **xml** file somewhere on your computer before proceeding.

Set-up the Account codes

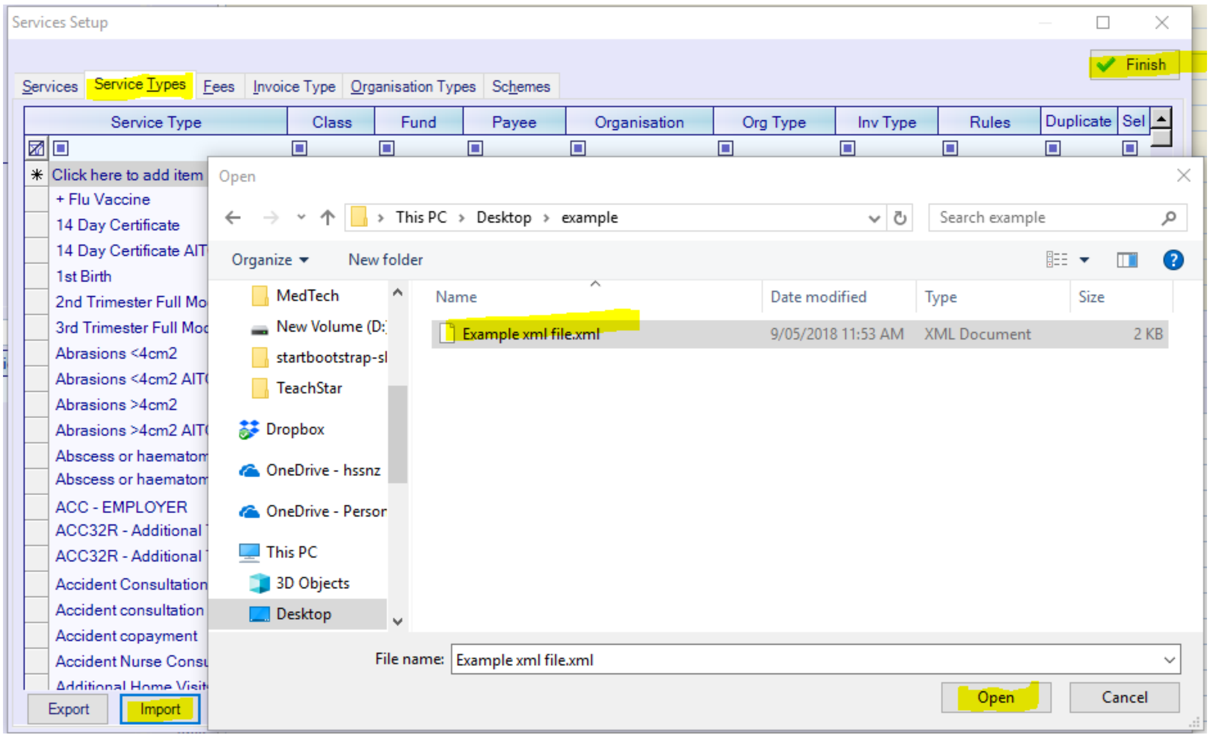
This will ensure that a record of the invoice is lodged against the PHO account in My Practice.

In My Practice,

1. Click **Accounts** -> **Accounts Setup**
2. Click the **Service Types** tab
3. Click the **Import** button

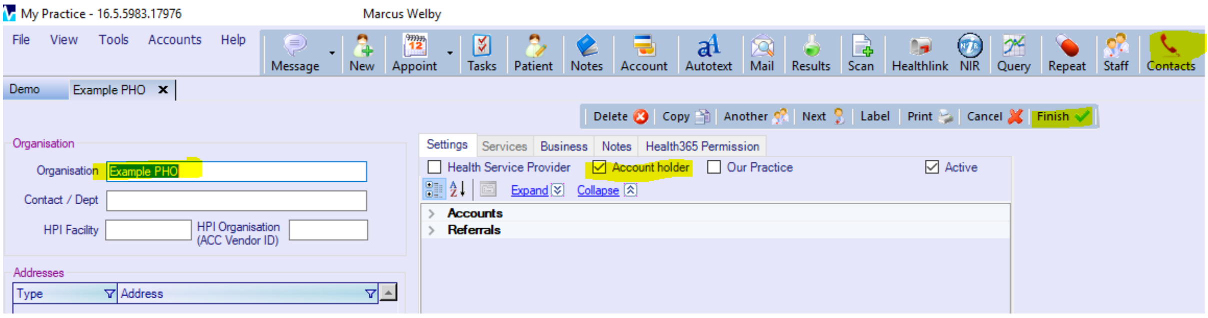
Note: It is important that you click the **Import** button on the **Service Types** tab, **NOT** the Import button on the **Services** tab, otherwise the accounts will not get set-up properly!

4. Browse to where you saved the **xml** supplied to you by the PHO.
5. Select the file, and click the **Open** button
6. Click the **Finish** button

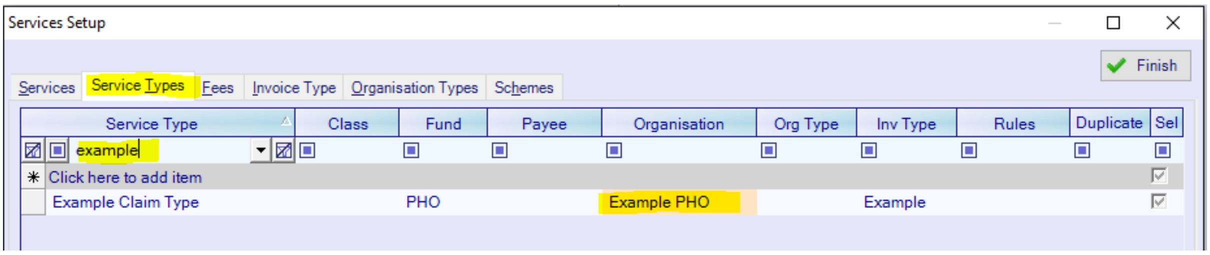


The relevant invoices will now be loaded into your accounting system. Follow the steps below to link them to the PHO account in your system.

7. Do you already have an account for the PHO set-up?
    a. **Yes**, skip to **Step 12**
    b. **No**, continue to **Step 8**
8. Click the **Contacts** button
9. Click the **New** button
10. Fill in the details for your PHO, making sure that you tick the **Account Holder** box
11. Click the **Finish** button



12. Click **Accounts** -> **Accounts Setup**
13. Click the **Service Types** tab
14. Filter the **Service Type** on the **Description** of the new claim type as advised by the PHO
15. Click on **Organisation** field for both records, and press the **Enter** button to locate the PHO account that you have already set-up and the click the **OK** button once you have selected it



16. Repeat Steps **14 – 15** for any other Service Type Descriptions advised by the PHO
17. Click the **Finish** button when done