# Single Sign On (SSO) with FYDO

At FYDO, we are committed to continuously enhancing the security and convenience of our platform for our valued customers. And because of that, we use Single Sign On (SSO) to FYDO! This feature will allow you to access FYDO using your existing credentials from Microsoft or Google, simplifying your login process while maintaining the highest level of security.

SSO is a secure authentication process that enables you to log in to multiple applications with a single set of credentials. By integrating SSO, we aim to provide you with a seamless and efficient log in experience.

When you log in, you will notice two buttons for Microsoft and Google account access, as pictured below.

If you are already logged into your browser with either a Google or Microsoft account, you can click on the applicable button to log in. This will take you directly to the FYDO dashboard or the Two-Step Verification Process via SMS, email, or an Authentication App as usual.

**Note**– The account you use must already be set up in FYDO to proceed.

If you are not already logged into your browser with an account, you will be prompted to **'Pick an account'** or **'Use another account'** as shown below. You will need to enter your password to proceed.

You may still use your email and password to log in unless your FYDO account subscriber has forced SSO to be used. In that case, you may receive a message at the top of the screen, as shown:

If you receive the message above, please try using the Microsoft or Google buttons. If you still have problems logging in, **contact your FYDO account subscriber** *(the person in charge of FYDO at your facility)* before reaching out to Altura Health Support.

**If you have forgotten your Microsoft or Google password, please contact your IT department. This issue is separate from FYDO and cannot be addressed by Altura Health Support.**

## How to enforce SSO in FYDO

SSO authentication can be enforced for all or selected users. Once SSO is enforced, an email invitation will be sent to the applicable user/s, advising them to activate their account via SSO. The user does not need to use the email invitation link; they can go directly to the FYDO website.

**Note:** Once a user is required to use SSO by their facility, their existing password will be deleted.

To enforce SSO for all users:

1. Go to **Settings > Security** and click **Edit**.

2. Tick the **SSO as Mandatory** tick box (as shown below) and click **Save**.

If, for any reason, some users are unable to authenticate using SSO, they can be reverted back to the standard email/password authentication method.

**To revert all users to email/password authentication:**

1. Simply untick the **SSO as Mandatory** box in **Settings > Security.**

**To revert specific users to email/password authentication:**

1. Go to **Settings > Users**
2. Double-click on required user
3. Click **Edit**
4. Untick **SSO Mandatory**
5. Click **Save**

Reverted users will receive another email invitation to set up their new password.

You can see which users have SSO enforced and whether they have successfully authenticated using SSO by going to **Settings > Users**.

- **SSO Blank:** User not forced to use SSO
- **SSO Red Cross:** User forced to use SSO but not activated
- **SSO Green Tick:** User has activated SSO

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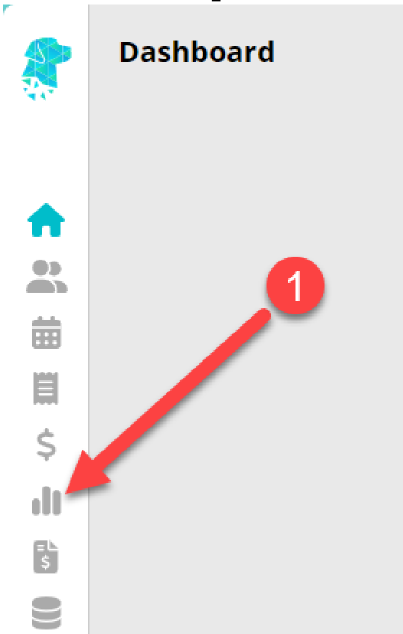
# Invoice Export Report

This report enables an Excel spreadsheet to be created of all invoice data for a selected date range.

### How to Export the Invoice Export Report:

1. Click on the **Reports Icon**


2. Under **Financial Reports**, Click on **Invoice Stats**
3. Change filters as required, or if you are wanting All Invoice Data for a specific date range, leave filters as the default filter options > Add the required **To** and **From Date Range** > Click **Export**
4. Report will be **Exported** as an **Excel–Raw** file.
By default, most computers will store downloads to your **Downloads** folder on your computer, or wherever you have set your browser to store your downloads on your computer.

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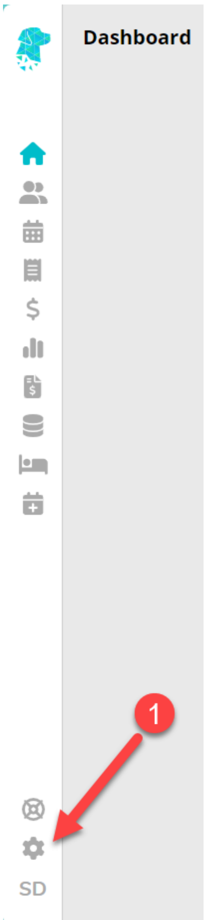
# Exporting Referring Doctors/Practices

### How to Export Referring Doctors:

1. Click on **Settings**




2. Under **General,** Click on **Referring Doctors**
3. Click the **Export To** button and choose either **Excel** or **PDF**.

## How to Export Practices:

1. Click on **Settings**


2. Under **General,** Click on **Practices**
3. Click the **Export To** button and choose either **Excel** or **PDF**.

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# Payments Report (Clinic)

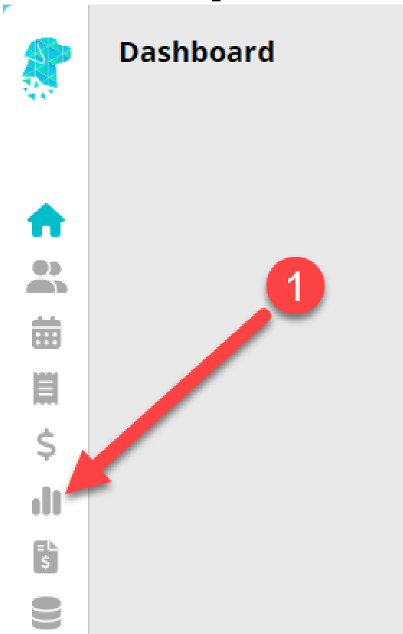
This report gives a list of all payments received in the selected date period either by Accounting Period, Audit Date or Date of Service. The data is able to be shown in formats such as Detailed, Summary and Summary Categories.

Filter options include:

- Location
- Department
- Doctor
- Payment Type
- Group By options
- From and To Date Range

### How to Print/Export the Payments Report:

1. Click on the **Reports Icon**




2. Under **Reports – Clinic**, Click on **Payments**
3. Change filters as required > Click **Update**
4. Report will generate below the filters section.
   To **Print** the report, Click the **Print** button.
   To **Export** the report, Click the **Export To** button and choose either **Excel**, **Excel – Raw Data** or **PDF**.

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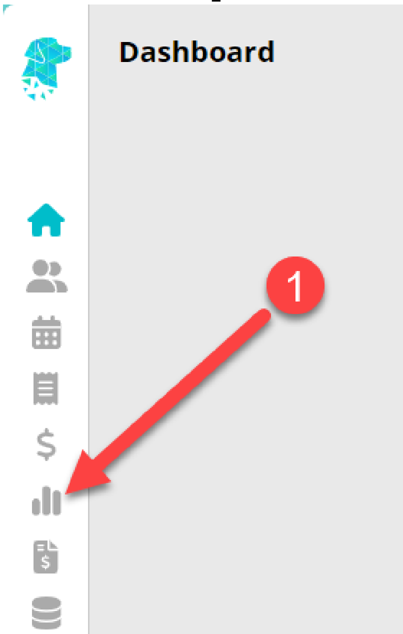
# [Patient Stats Report]

The **Patient Stats Report** gives the ability to obtain extensive patient demographics data.

- Medicare Patients
- Deceased Patients
- Archived Patients
- DVA Patients
- Indigenous Status
- Referral Expired
- Preferred Doctor
- Health Fund
- Gender

- Surveys
- Ability to stipulate Birth date range
- Ability to stipulate Created range
- Ability to stipulate Postcode range
- Community Nursing Cycle
- Ability to stipulate Billed range
- Doctor

### How to Print/Export the Patient Stats Report:

1. Click on the **Reports Icon**


2. Under **Patient Reports**, Click on **Patients Stats**
3. Change filters as required, or if you are wanting All Patient Demographics, leave filters as the default filter options > Click **Update**
4. Report will generate below the filters section.
To **Print** the report, Click the **Print** button.
To **Export** the report, Click the **Export To** button and choose either **Excel** or **PDF**.

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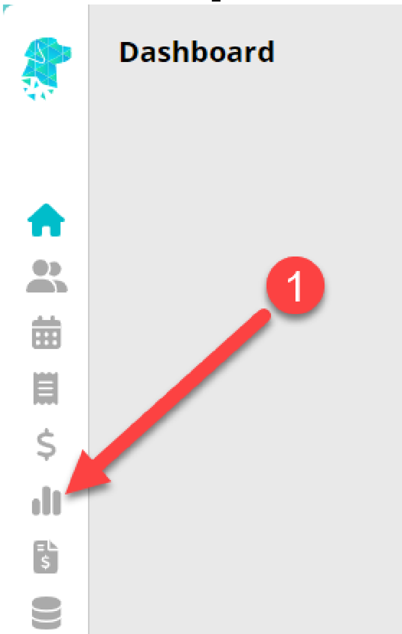
# Arrears Report (Clinic)

This shows all invoices without a zero-dollar balance. It can be run by Location, Department, Fund, Bill Type, Doctor, Period that the account has been outstanding for *(e.g. 30 days & over)*. It can be run as the following Report Types:

1. **Detail** – Showing every patient and the balance
2. **Summary** – Showing each bill type and the balance
3. **Interactive** – Enabling follow up dates and notes to be accessible, to facilitate efficient workflow in debt recovery

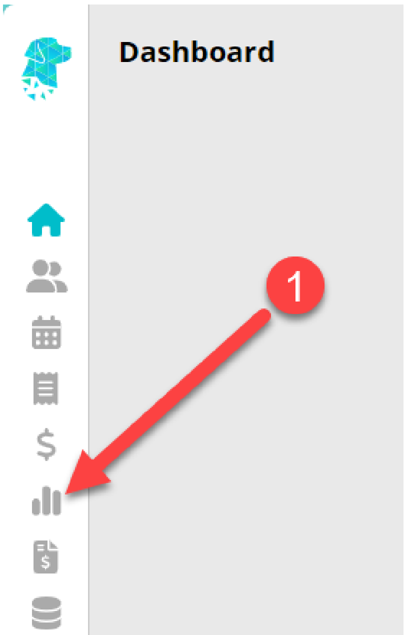
## How to Print/Export the Arrears Report *(Summary and Detail)*:

1. Click on the **Reports Icon**


2. Under **Reports – Clinic**, Click on **Arrears**
3. Change filters as required > Click **Update**
4. Report will generate below the filters section.
   To **Print** the report, Click the **Print** button.
   To **Export** the report, Click the **Export To** button and choose either **Excel**, **Excel – Raw Data** or **PDF**.

## How to Export the Arrears Report *(Interactive)*:

1. Click on the **Reports Icon**




2. Under **Reports – Clinic**, Click on **Arrears**
3. Select **Interactive** > Change filters as required > Click **Update**
4. Report will generate below the filters section.
   Click the **Export To** button and choose either **Excel** or **Excel – Raw Data**.

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# Amending a User’s Email Address

**There may be instances when a user needs to change their FYDO log in email address. This can be done by the user themselves by following the steps below.**
**The only exception is the Subscriber who is unable to change their email address themselves & will need to contact FYDO Support if amendments need to be made.**

1. Hover over **User Profile** *(Your Initials)*
2. Select **Edit Profile**
3. Select **Edit**
4. Amend **Email**
5. Click **Save**

The new email address will need to be used for log ins from there on.

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# How to change user’s timezone

Need to change your timezone? Read on to learn how!

*Note: This setting is unique to the user. Therefore, each user will need to check their own timezone settings.*

1. Hover over the **profile icon** *(Your Initials)*
2. Click on **Edit Profile**.
3. Select **Edit**
4. Select the desired **TimeZone**.

Click **Save** and you’re all done! You have successfully updated your TimeZone on ***this profile.***

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# How to Find Your Minor ID

The minor ID, also referred to as the Location ID, will sometimes be required by Medicare. It is the same as your ADV client number. Here’s how to find it in FYDO:

1. Hover over the **Support** icon
2. Your **Minor ID** will be displayed in the heading

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# Tokens – Mailing Label

| Token Name | Data | Notes |
|---|---|---|
| <<PracticeName>> | Practice Name | |
| <<Title>> | Title | |
| <<FirstName>> | First Name | |
| <<LastName>> | Surname | |
| <<MailingAdd1>> | Location Address 1 | |
| <<MailingAdd2>> | Location Address 2 | |
| <<MailingAdd3>> | Location Address 3 | |