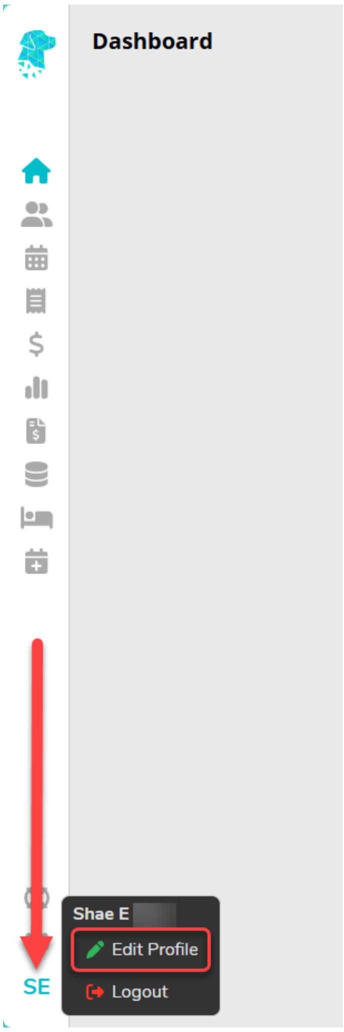
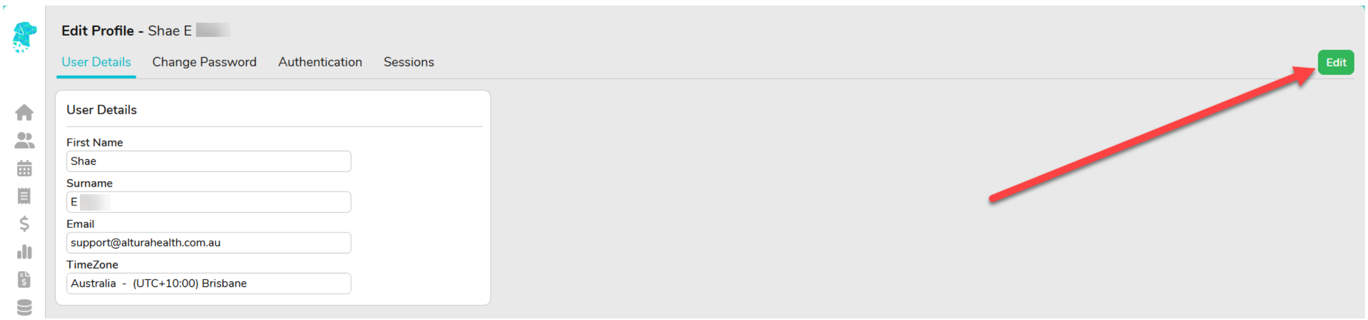
Updating a Username

There may be instances when a user needs to change their name in FYDO. This can be done by the user themselves, by following the steps below.
[redacted]

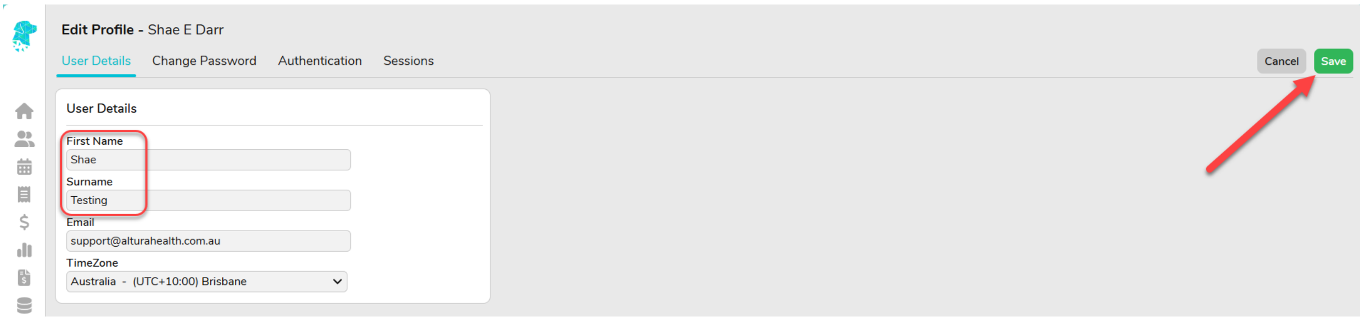
1. Hover over **User Profile** *(Your Initials)*
2. Select **Edit Profile**



3. While on the **User Details** tab, select **Edit**

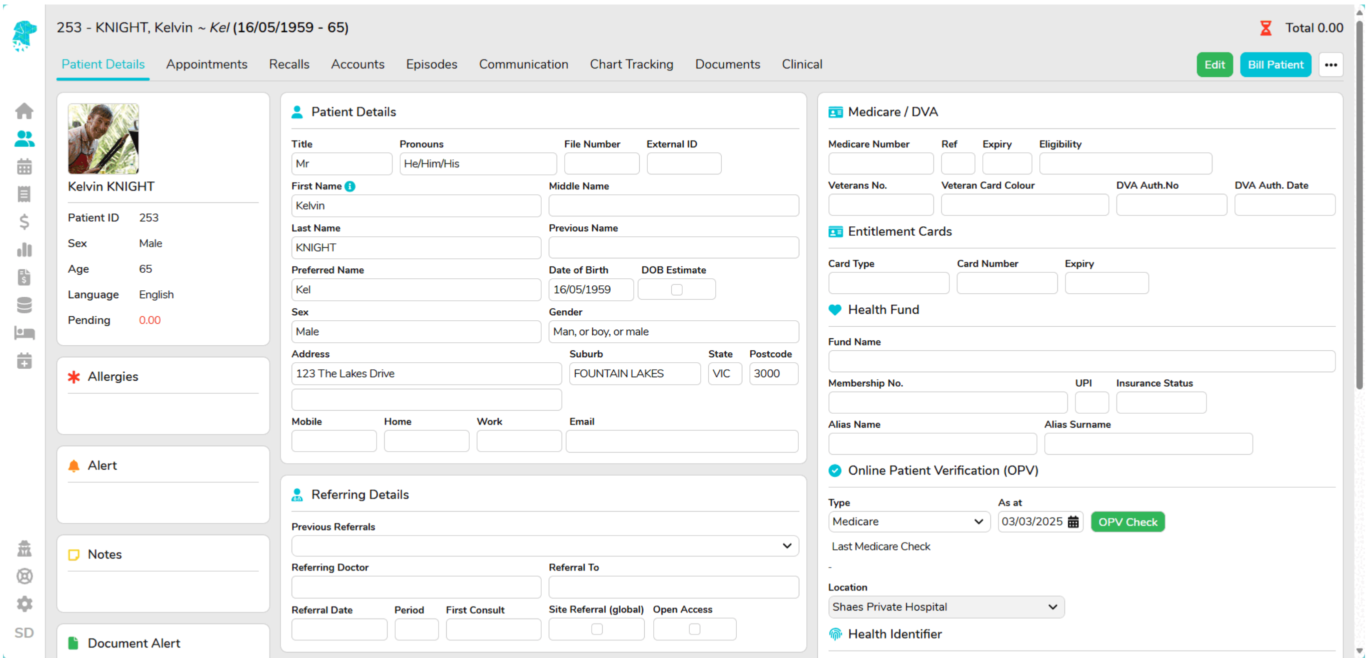


4. Amend the required **First Name** or **Surname** fields
5. Click **Save**

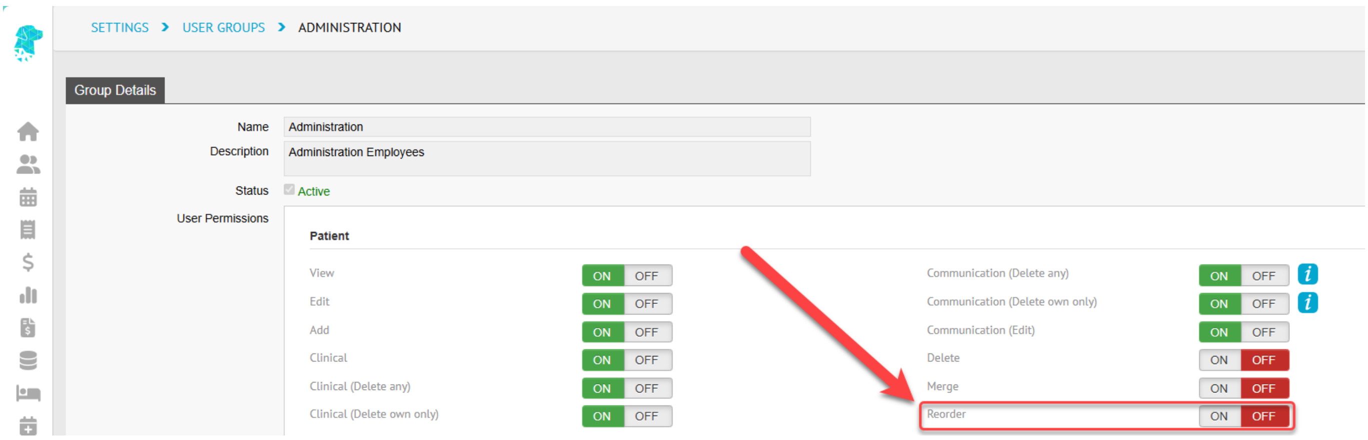


Re-Order Patient Screen

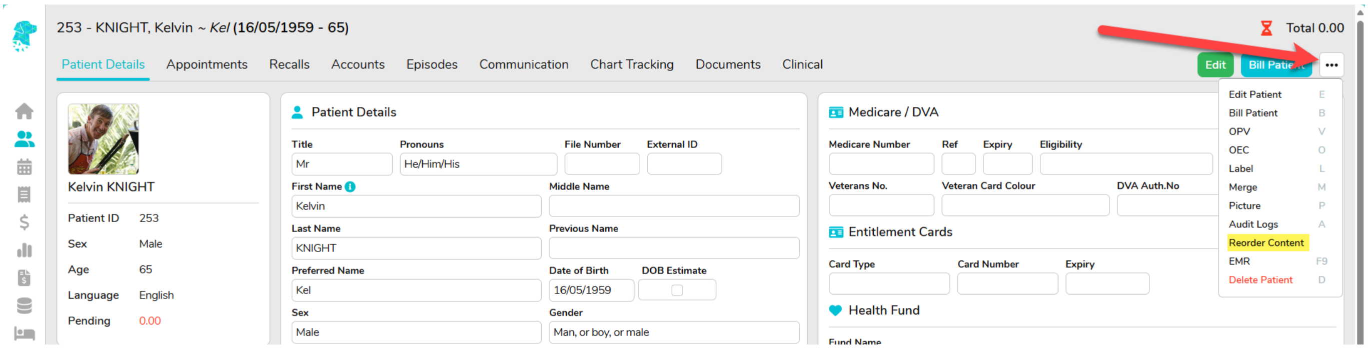
Users can customise the **Patient Screen** and display the details that are most relevant to them!



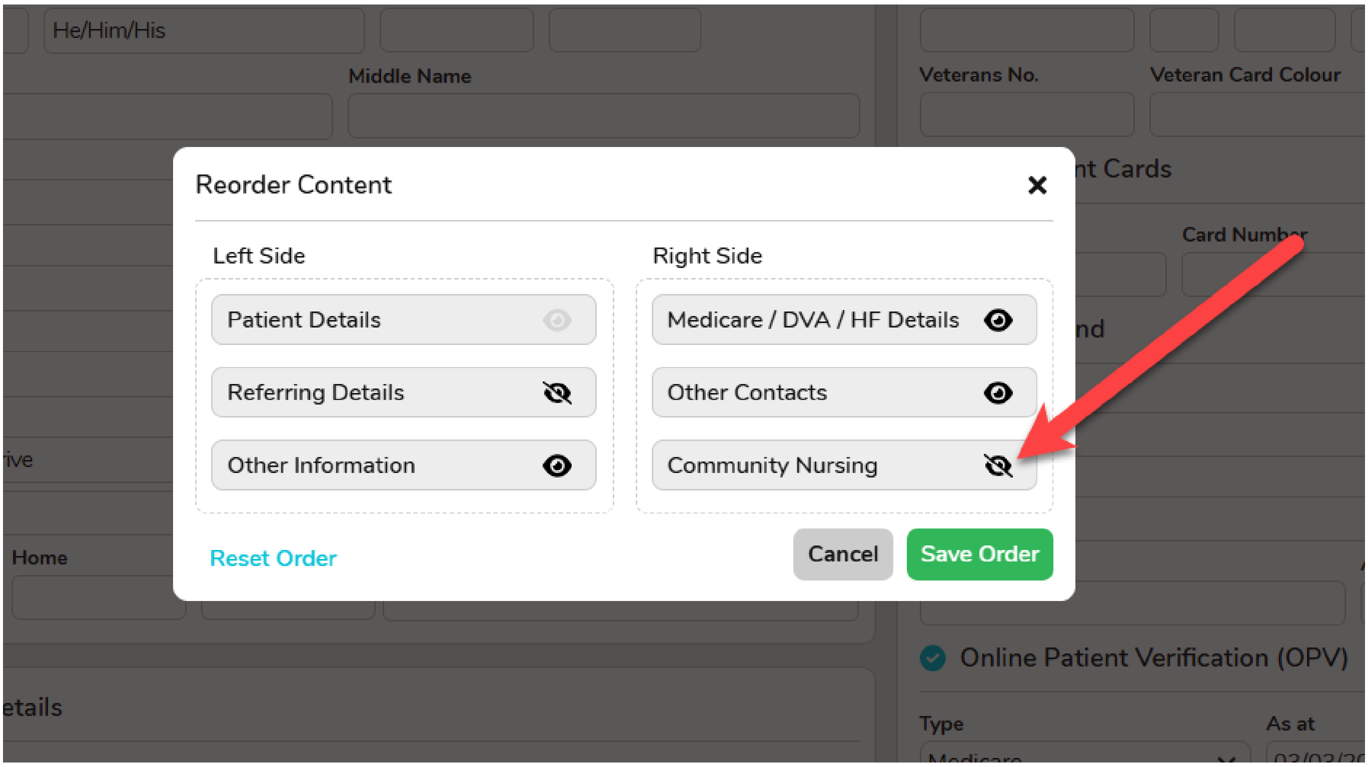
Access to this feature is managed at the User Group level, via **Settings > User Groups**, by amending the option under **Patient** for **Reorder.**



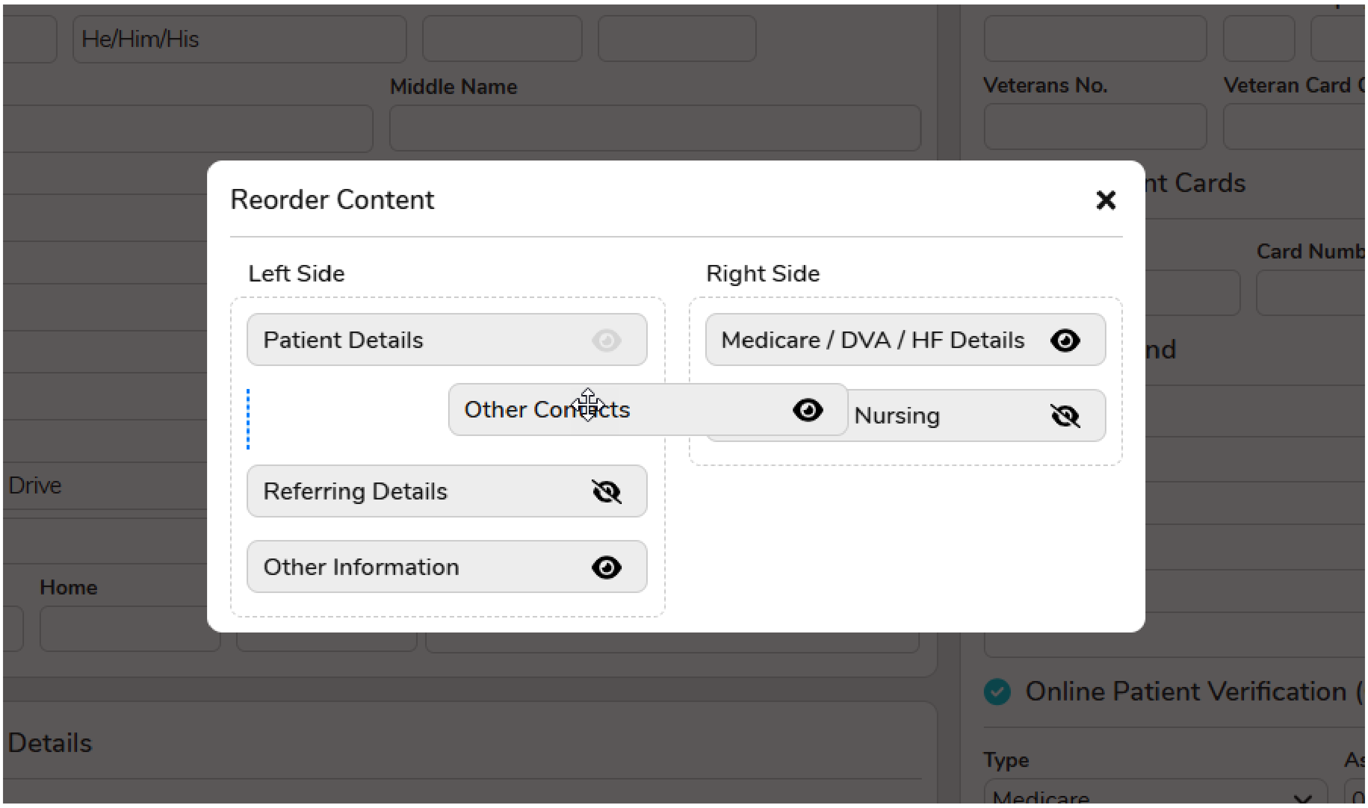
Users with the appropriate access levels can customise the layout of the patient screen by navigating to any patient and selecting **Reorder Content** from the **Menu** in the top-right corner.



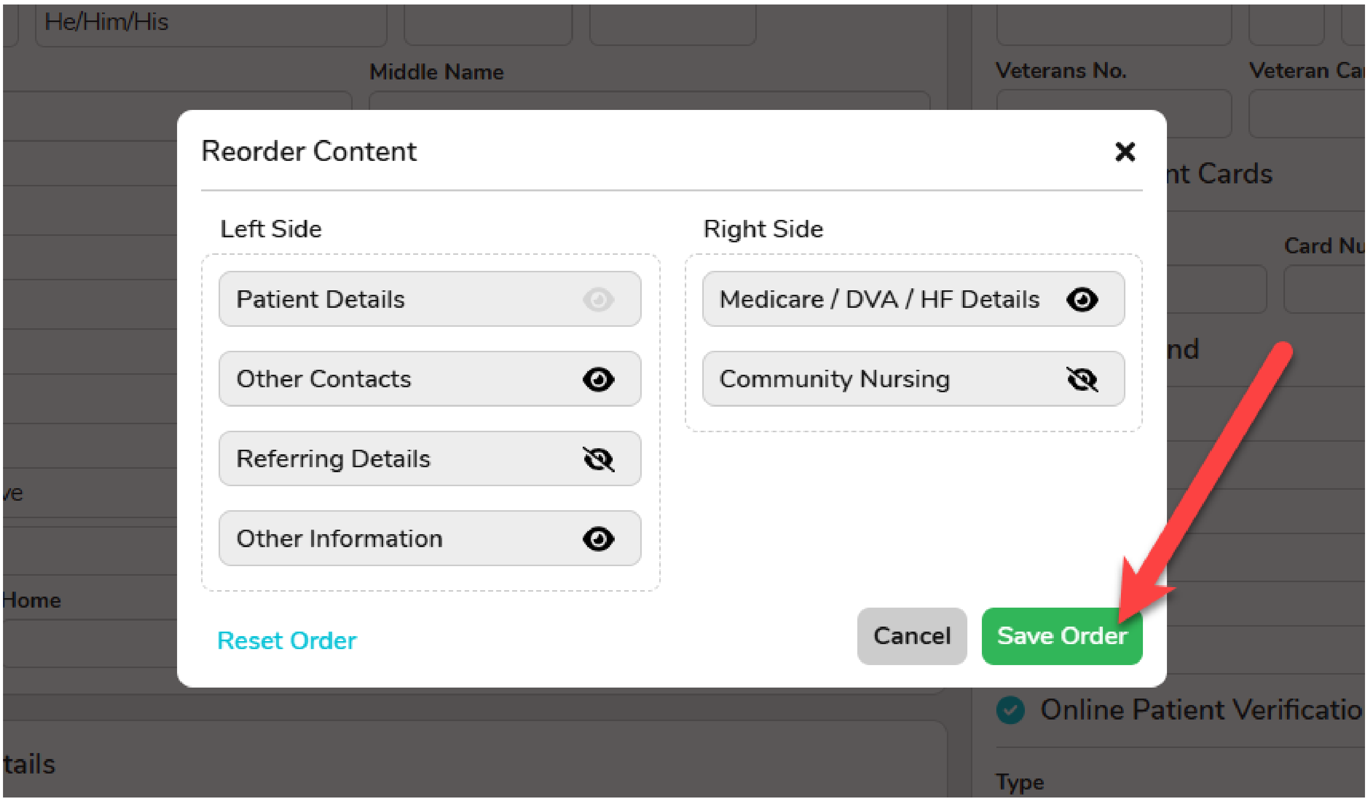
This allows users to choose which groups of information are visible and hide irrelevant details using the eye icon.



Information groups can also be **Reordered** by dragging them to the appropriate spot. The layout can be displayed across two columns or condense it into a single column if needed.



Once the desired order has been selected, click **Save Order** and the view will be displayed whenever the **Patient Screen** is opened.



SMS Automation in FYDO

Stay connected with your patients effortlessly with the new **Automated SMS** feature in FYDO!
This feature allows you to automatically send SMSs to patients before and after their admissions, at timeframes that work for you!
– Need to send patients their admission times? Done.
– Need to remind patients to complete their Admission Form? No problem.
– Want to send a Post-Discharge follow-up or request feedback via a Patient Survey? It's all possible!

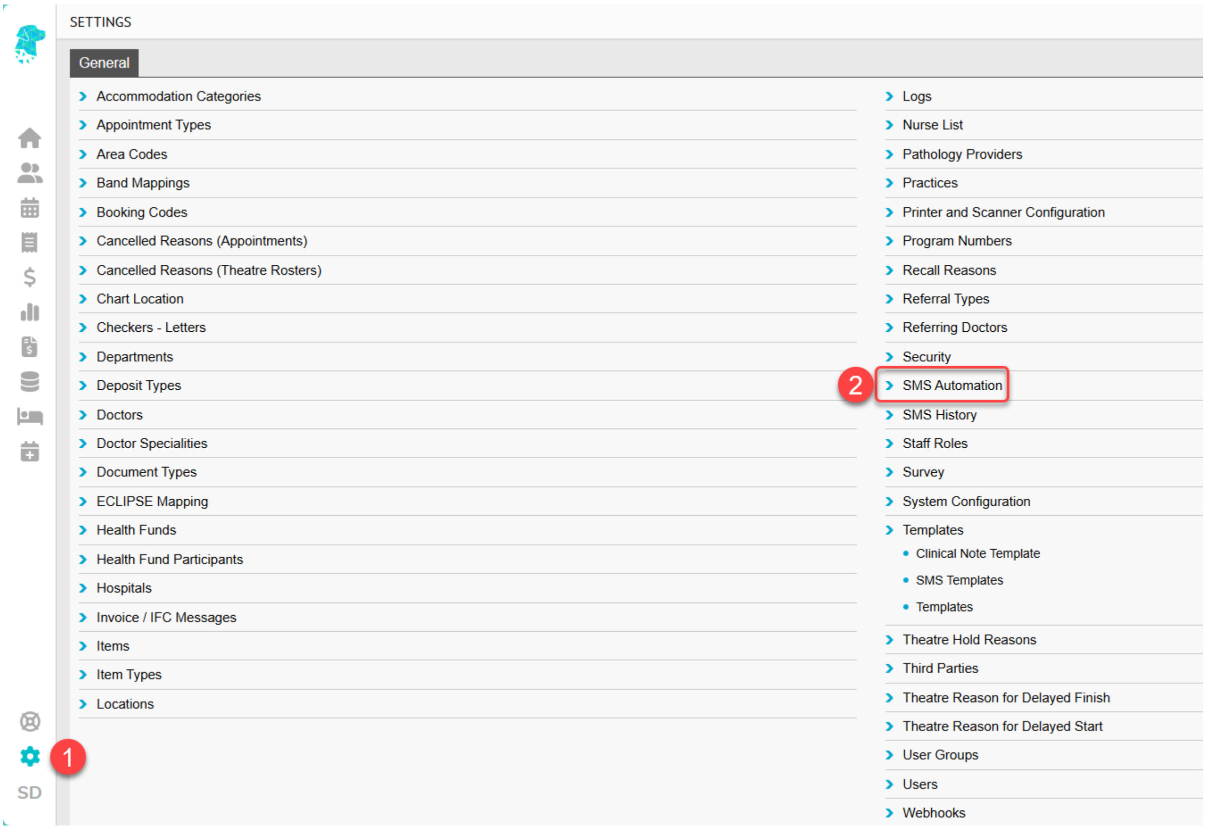
[redacted]

[redacted] **support@alturahealth.com.au**
[redacted]

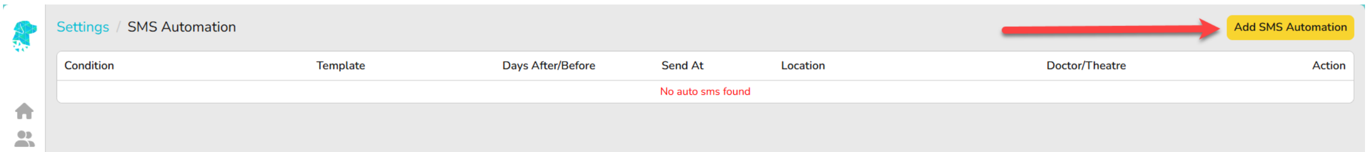
To start using the **Automated SMS** feature, here's what you'll need to have in place:

- **An SMS Account:** You'll need an SMS account set up in FYDO. If you're not sure whether you already have one, contact our team.
- **SMS Templates:** You'll need to set up SMS Templates. Detailed instructions are available on our Adding SMS templates – FYDO Wiki
- **SMS Automation:** Once your templates are ready, you'll need to set up SMS Automation in the FYDO Settings. Let's walk through that now!

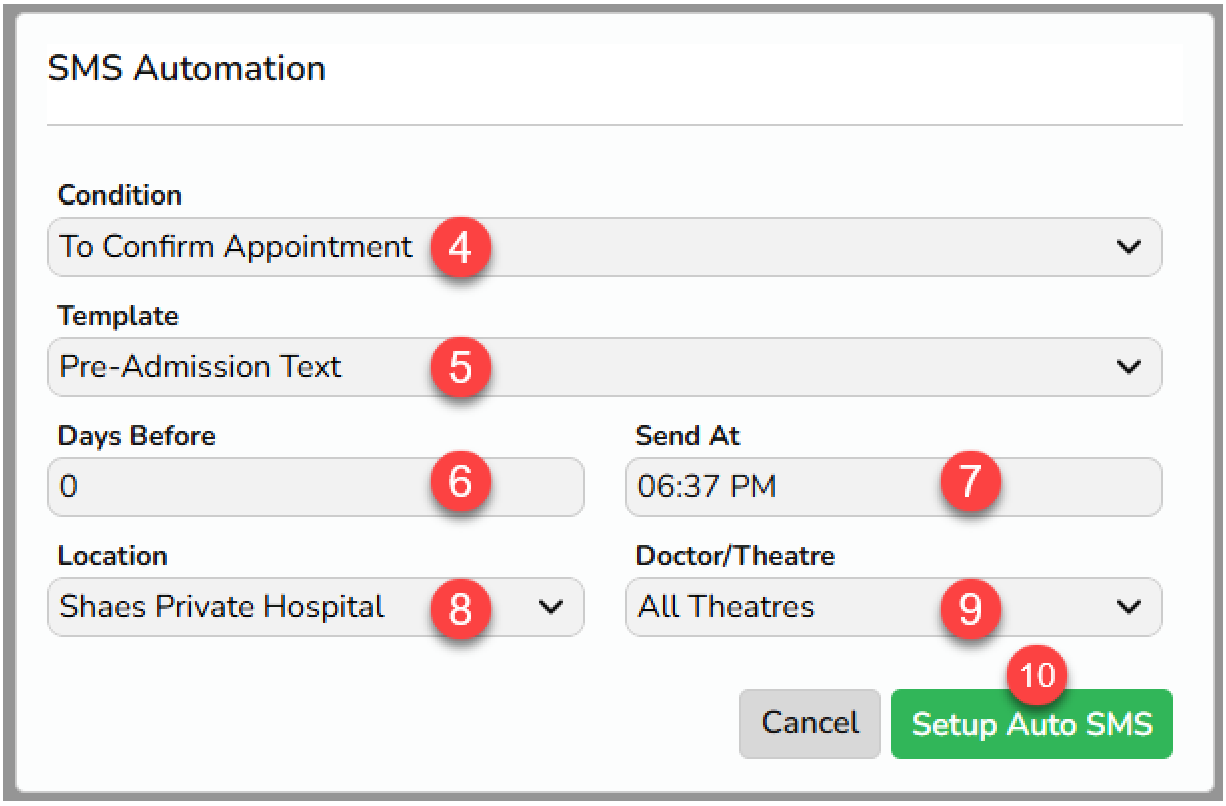
1. Navigate to **Settings**
2. Select **SMS Automation**



3. Click **Add SMS Automation**



4. Select the **Condition.** *(We will go into detail on each of the* ***Conditions*** *later in the instructions and explain what field in FYDO governs their status)*
5. Select the required **Template**
6. Select the **Number of Days Before** or **After** the episode that you'd like the SMS to be sent
7. Select the **Time** that you'd like the SMS sent
8. Select the **Location** for Multi-Location databases. *(Single location databases will not need to amend this field)*
9. Select the specific **Theatre** if this Automated SMS is only going to apply to one. Otherwise leave the selection as **All Theatres**
10. Click **Setup Auto SMS**

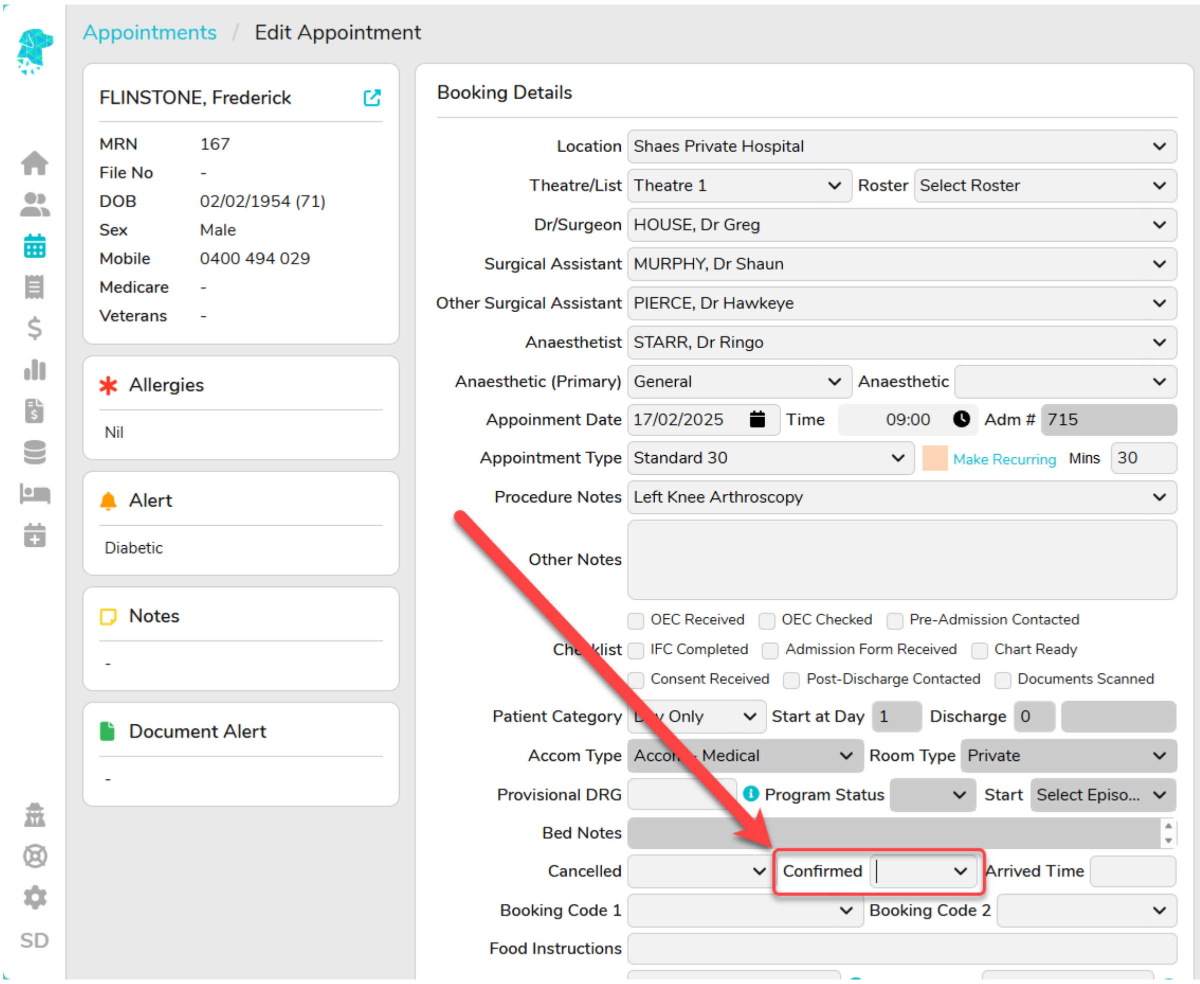


[redacted]

To Confirm Appointment

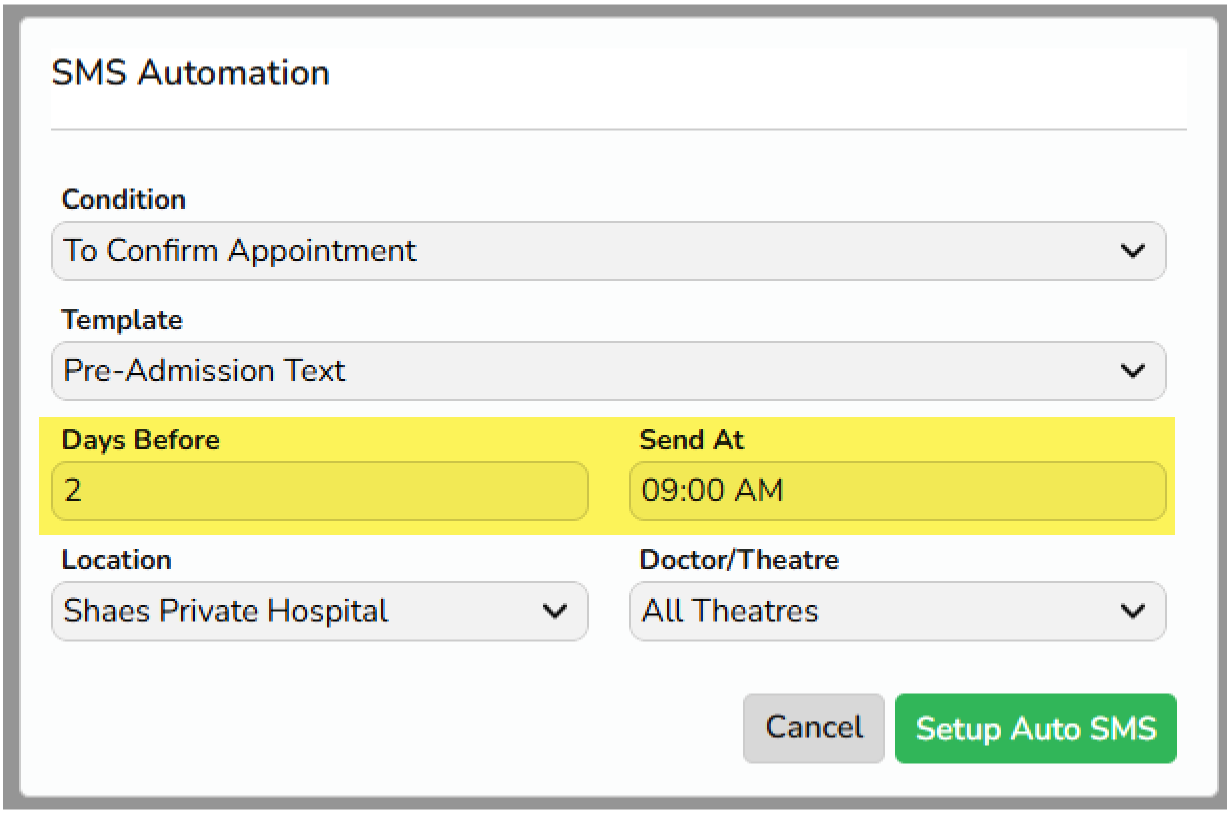
This type of SMS automation is triggered by the **Confirmed** field in the **Edit Appointment Screen** of each episode. When the Automated SMS Condition is set to **To Confirm Appointment** this field will be checked before sending, to ensure the message is only sent to appointments that haven't been confirmed yet.

[redacted]



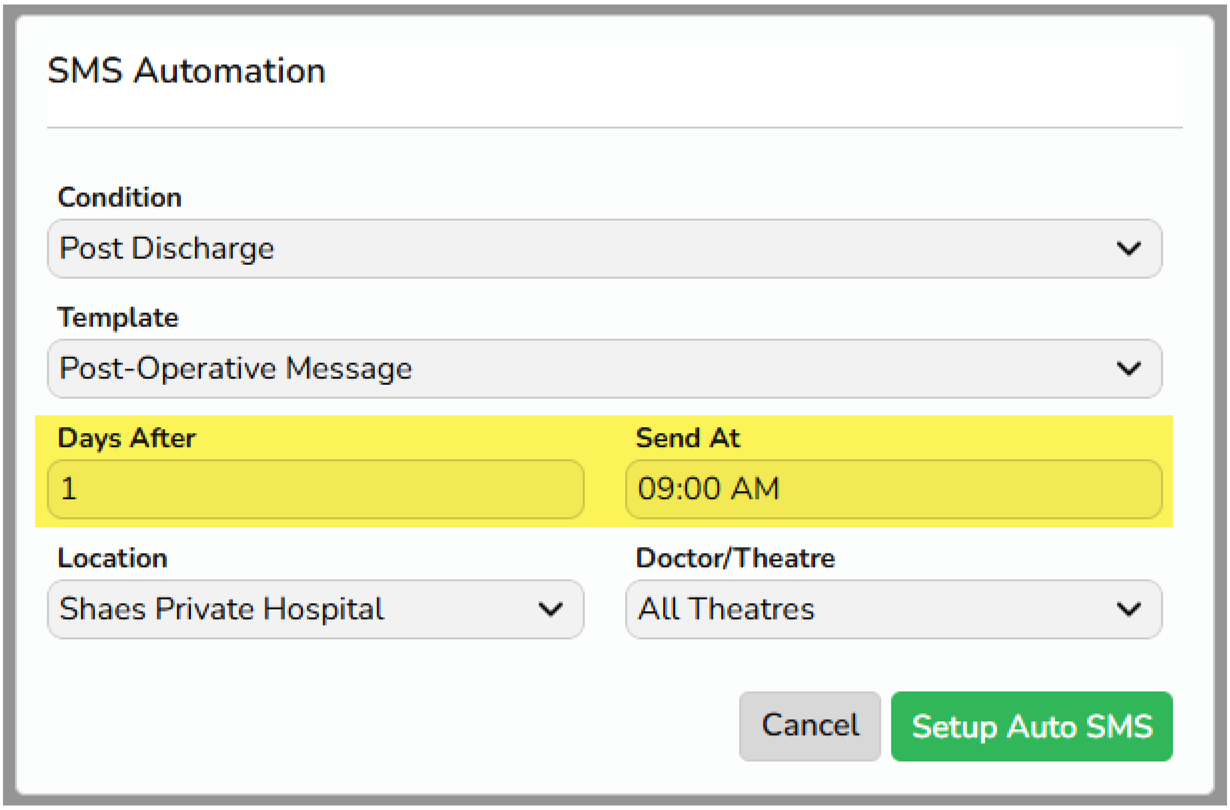
For example, the automated SMS feature will check for appointments scheduled in the next two days that haven't been confirmed. It will send the selected SMS template at 9am.
For the below example, let's say today is Monday:

- The system will check all appointments scheduled for Wednesday and send the SMS to those without an entry in the **Confirmed** field.
- FYDO will also scan for any late additions to appointments within the two-day window to ensure these patients also receive the SMS.



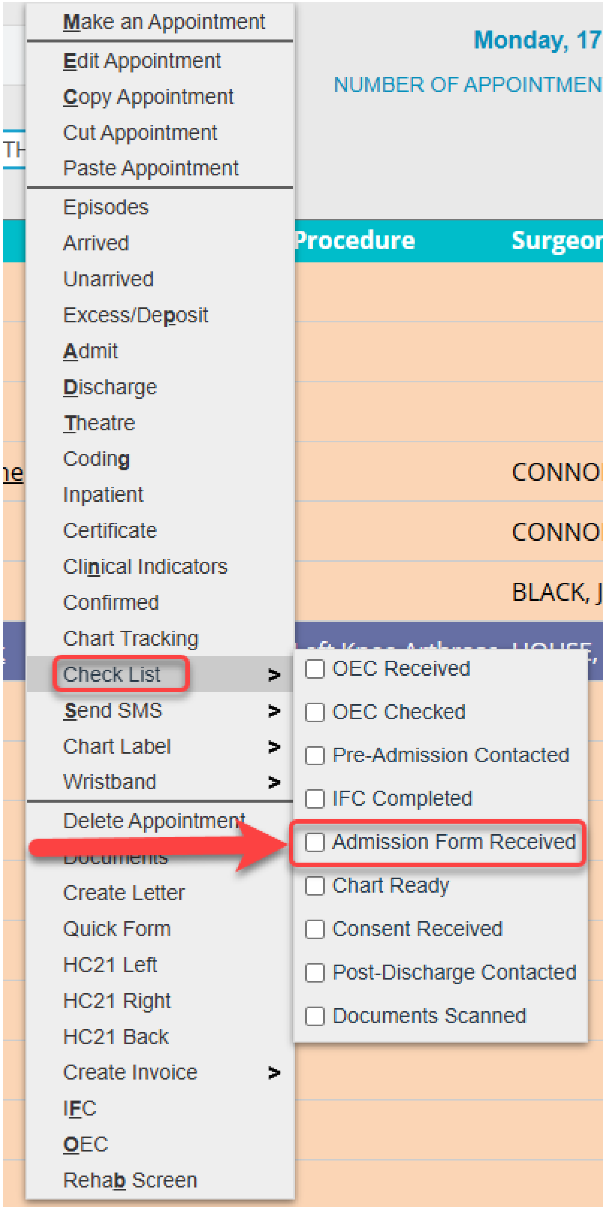
Post Discharge

This SMS automation is based on the **Discharge Date.** Once an episode is discharged, the SMS will be sent at the designated timeframe **after** the discharge date.
For example, if today is Monday and a patient is discharged at 1pm, they will receive the automated **Post Discharge SMS** one day after their discharge date. In this case, the SMS will be sent on Tuesday at 9am.



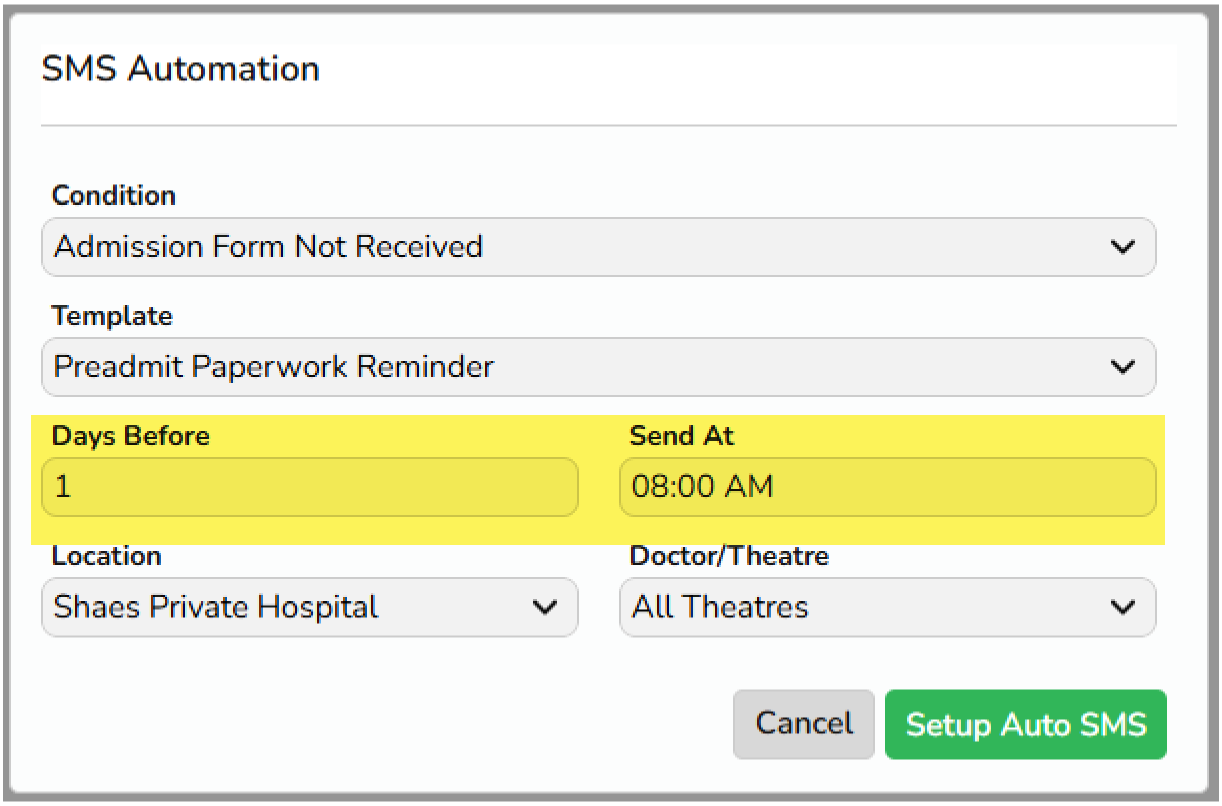
Admission Form Not Received

This automated SMS is triggered based on the **Admission Form Received** Check List item. If the checkbox is marked for a patient's admission, they will not receive the automated SMS. This means the SMS will only be sent to patients who have not yet completed their admission form!



With the check box now automatically ticked when patients completed Online Preadmit Paperwork is committed, following up with patients who still need to complete this task has never been easier!

For the below example, if a patient is booked for Monday, they will receive their **Admission Form Not Received** reminder on Sunday at 8am, the day before their scheduled admission.

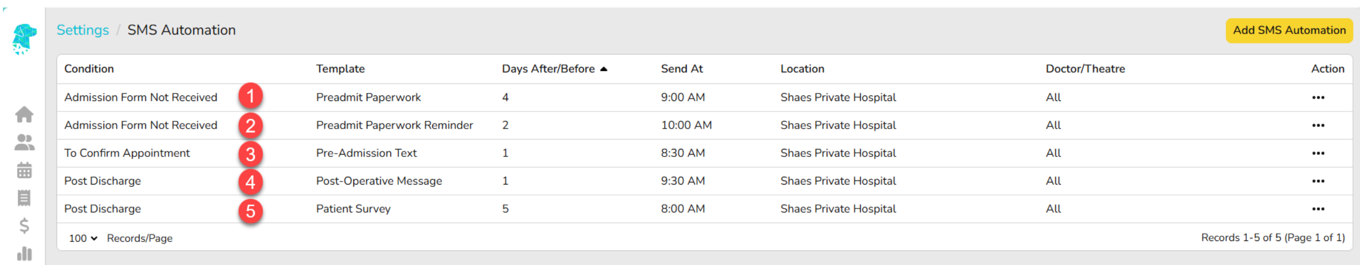


Keep in mind, you can set up **multiple SMS Automations**! So, if you want to remind patients every day until they submit their admission form, you can easily do that!

[redacted]

[redacted] support@alturahealth.com.au [redacted]

Let's look at a demo setup for streamlining patient communication! Automating these SMS reminders can really help improve patient engagement and reduce the administrative burden on staff. Here's an example of how it can work and why it's effective:



Condition	Template	Days After/Before	Send At	Location	Doctor/Theatre	Action
Admission Form Not Received 1	Preadmit Paperwork	4	9:00 AM	Shaes Private Hospital	All	•••
Admission Form Not Received 2	Preadmit Paperwork Reminder	2	10:00 AM	Shaes Private Hospital	All	•••
To Confirm Appointment 3	Pre-Admission Text	1	8:30 AM	Shaes Private Hospital	All	•••
Post Discharge 4	Post-Operative Message	1	9:30 AM	Shaes Private Hospital	All	•••
Post Discharge 5	Patient Survey	5	8:00 AM	Shaes Private Hospital	All	•••

100 Records/Page Records 1-5 of 5 (Page 1 of 1)

1. **Online Pre-Admission Form Link (4 days before admission)**
   This gives patients a head start in completing their required paperwork. The fact that it only contacts those who haven't already submitted the form is a great way to avoid unnecessary follow-ups and potential annoyance for patients who are already on top of their forms.
2. **Follow-Up Reminder for Admission Forms (2 days before admission)**
   A reminder just before the deadline to submit the form ensures that those who missed the first notification get another nudge, but again, it avoids bothering anyone who's already completed the form. A gentle follow-up can help improve compliance.

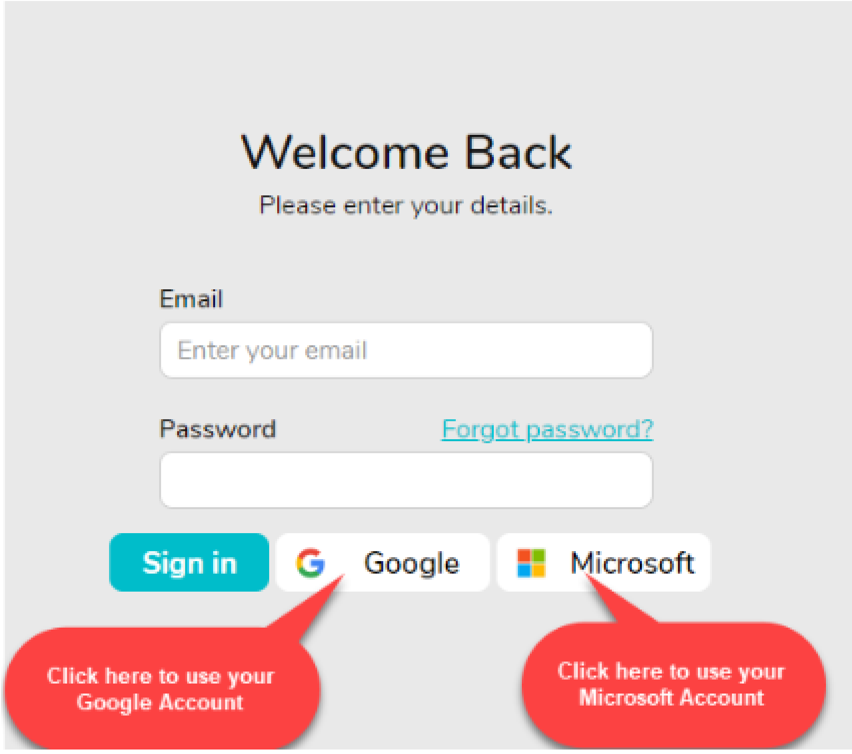
3. **Pre-Procedure Confirmation (1 day before admission)**
   This is crucial for making sure patients are prepared with all the details – admission time, fasting instructions, what to do when they arrive, and appointment confirmation. It helps patients feel more confident and organized the day before their procedure.
4. **Post-Discharge Check-In (1 day after discharge)**
   Checking in on patients after they leave the hospital can show that you care about their recovery, making them feel supported and giving you an opportunity to catch any concerns early. Helping you meet your post-discharge obligations.
5. **Patient Survey Link (5 days post-discharge)**
   Asking for feedback via a patient survey is a great way to gather insights on their experience and identify any areas for improvement. Giving them a little time to settle into their recovery before asking for feedback might result in more thoughtful responses. Automating this follow up ensures all patients are given the opportunity to participate in providing feedback.

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.

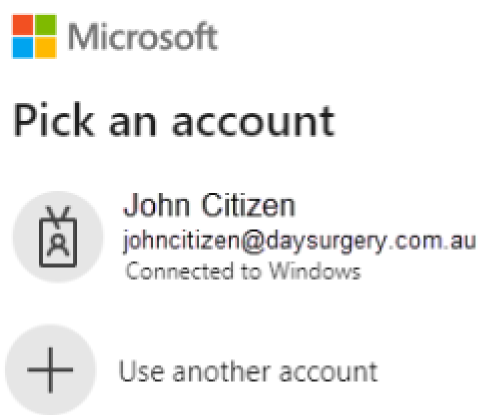
When you log in, you will notice two buttons for Microsoft and Google account access, as pictured below.



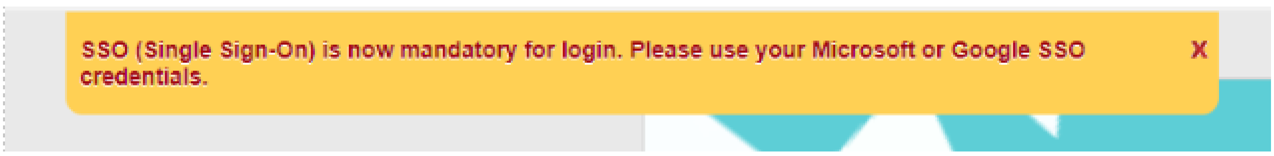
If you are already logged into your browser with either a Google or Microsoft account, you can click on the applicable button to log in. This will take you directly to the FYDO dashboard or the Two-Step Verification Process via SMS, email, or an Authentication App as usual.

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

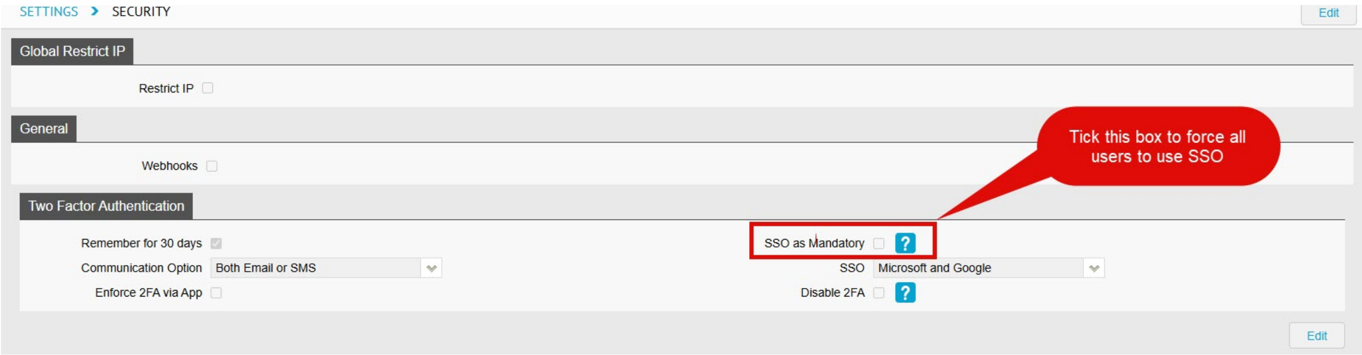
SSO authentication can be enforced for all or selected users. Once SSO is enforced, an email invitation will be sent to the applicable user/s, advising them to activate their account via SSO. The user does not need to use the email invitation link; they can go directly to the FYDO website.

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**.

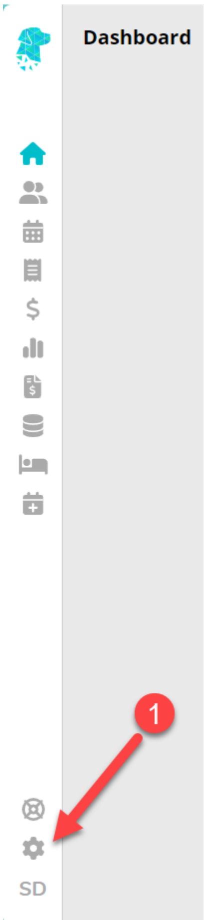
	Group	SSO	2FA App	Last Login
ealth.com	Subscriber			03/01/2024
@acsshealth.com	Test Group	✗		12/09/2023
@alturahealth.com.au	Full	✓		01/03/2024
:sshealth.com	Test Group	✗		-
ırahealth.com.au	Test Group	✓	✓	21/05/2024

- **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

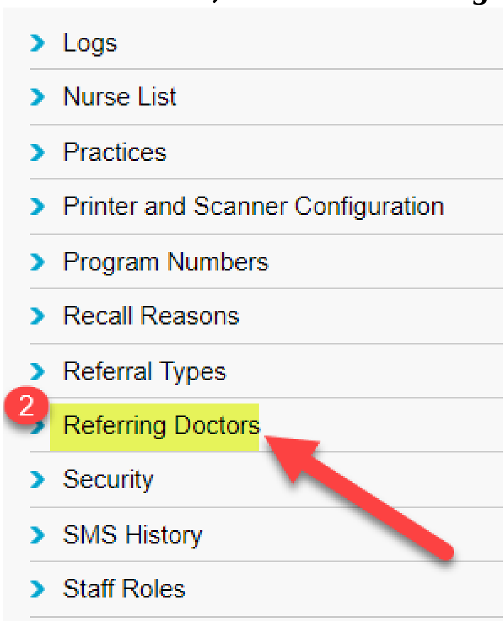
Exporting Referring Doctors/Practices

How to Export Referring Doctors:

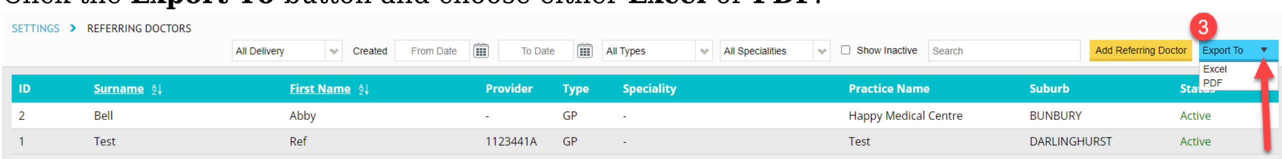
1. Click on **Settings**



2. Under **General,** Click on **Referring Doctors**

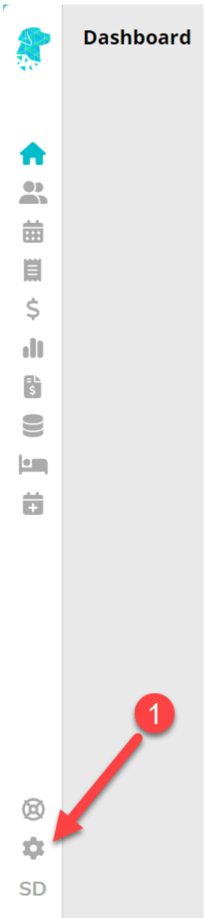


3. Click the **Export To** button and choose either **Excel** or **PDF**.

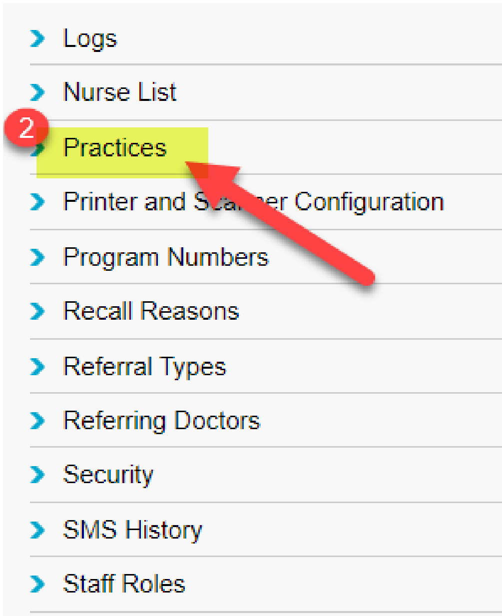


How to Export Practices:

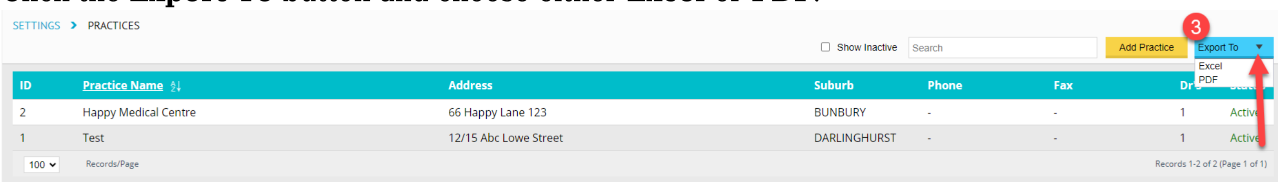
1. Click on **Settings**



2. Under **General,** Click on **Practices**



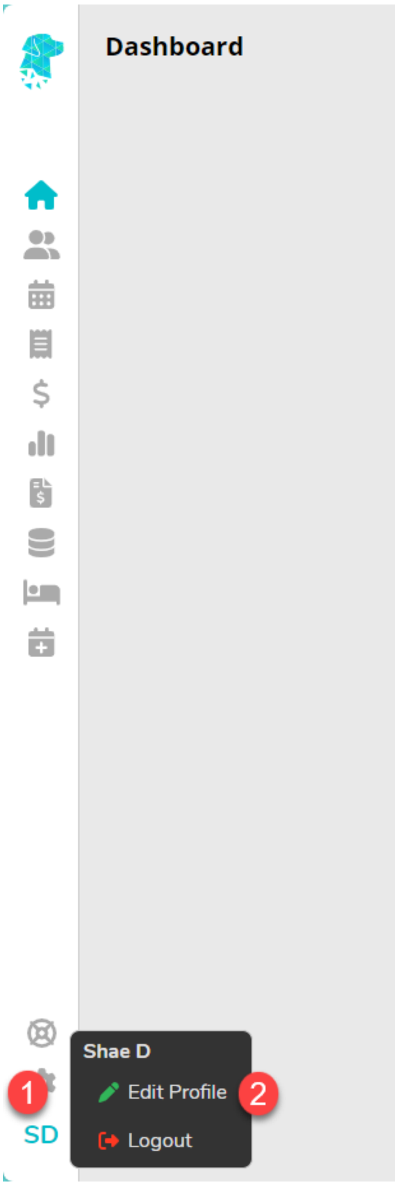
3. Click the **Export To** button and choose either **Excel** or **PDF**.



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**

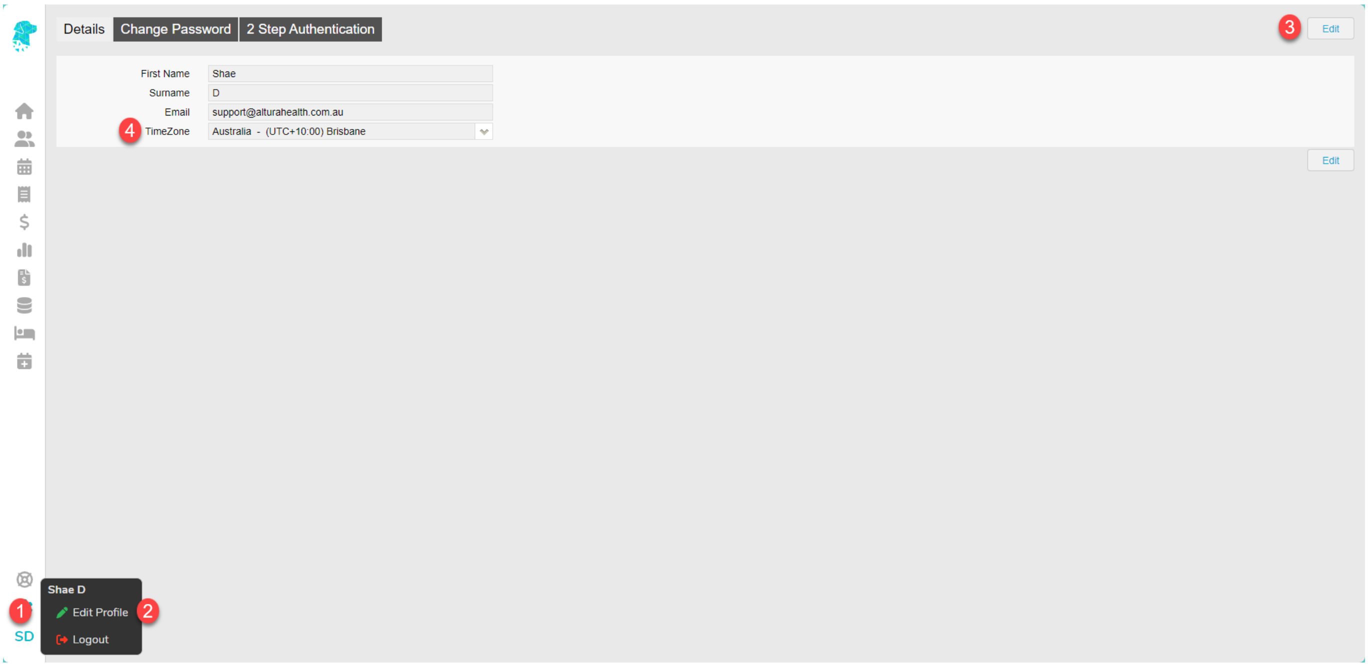
The new email address will need to be used for log ins from there on.

How to change user's timezone

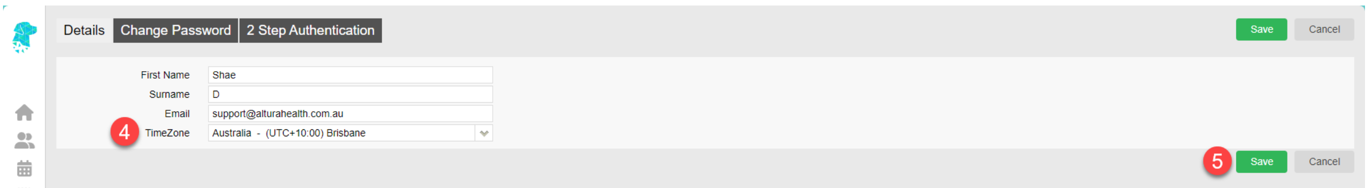
Need to change your timezone? Read on to learn how!

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**.



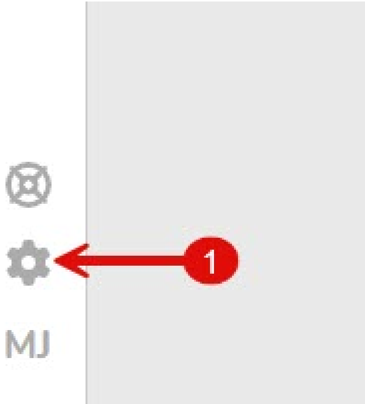
Click **Save** and you're all done! You have successfully updated your TimeZone on ***this profile.***



Adding SMS templates

Do you regularly SMS patients? If so, you can create custom SMS templates to save time typing up the message every time and to send tailored messages, complete with the patient's name, appointment time, serving doctor, and more.

To begin, first go to **Settings**.



Then click on **SMS Templates** under the templates menu.

This reveals the SMS templates currently available. By default, an **Appointment Reminder** template will be available to you.

Adding a new SMS template

To add a new SMS template, click on the **Add SMS Template** button.

Then, select the SMS **Type**, enter the template **Name**, and type out the SMS content in the **Description** field.

SMS Tokens

You can use 'SMS tokens' which are commands that look like: <<*patfirstn*>> to send tailored SMS messages. The aforementioned token for instance dynamically pulls the patient's first name.

There are SMS tokens for patient details, appointment details, doctor/ practice details, referral details, and more.

For a full list of tokens, click the link below:

https://wiki.fydo.cloud/?s=tokens

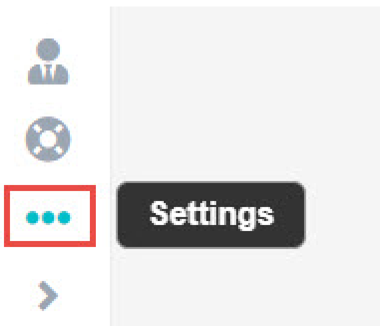
Once you're happy with the contents of your SMS template, click **Save** and you're done! Your new SMS template will be available next time you wish to send a custom SMS message.

For some SMS Template ideas see our helpful wiki page https://wiki.fydo.cloud/sms-template-examples/

[Adding MBS items – Clinic]()

Want to know how to add items into Fydo? Follow the below steps and you'll be billing them in no time!

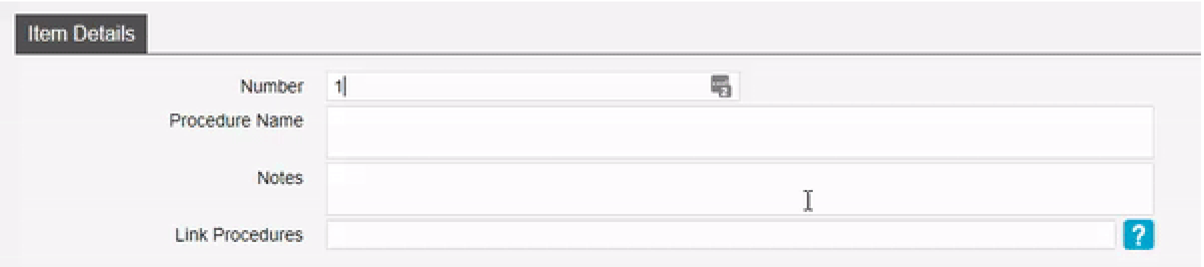
First, lets head to **Settings**, located in the lower left hand corner of Fydo.



Then select **Items,** this will display a list of all your current items.

To add a new item, lets click the yellow **Add Item** button.

Simply enter the item you need in the **Number** field as below, found under the **Item Details.**



You will see the **Procedure name** be automatically filled.

Now just click on the green **Save** button.

All done! The rest of the information regarding the item will automatically be added from information via the **Medicare Benefits Schedule** online Website.

Things such as:

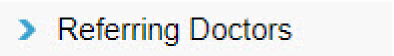
- Fees (Medicare and DVA rates)
- Description
- Rule (If it has one e.g Surgical step down)

Making a Referring Doctor Inactive

Need to delete or remove an existing referring doctor? Read ahead to find out how we can make them **Inactive.**

1. Click on **Settings**

2. Then, **Referring Doctors**



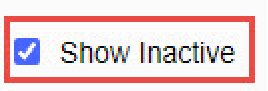
This will display a list of all the referring doctors you currently have.

3. Select the doctor you wish to make **Inactive** by clicking anywhere on their row in the list of doctors.

4. You will now see the details for this doctor, now click on **Edit** on the top right hand corner of the page. Simply untick the **Active** box next to **Status** as shown below.

Now the doctor has been made **Inactive**; you will not find them when searching for them, and they will not appear on the list of **Referring Doctors**.

If you wish to view the doctor again, or make them **Active** again, simply tick the **Show Inactive** box from the **Referring Doctors** screen.



You will now be able to see the doctor, and you can edit them as per normal, including making them **Active** again.