

Deactivating a User

When users no longer require access to FYDO, they can be deactivated in the system.

1. Select **Settings**
2. Click **Users**

The screenshot shows the 'SETTINGS' page with the 'General' tab selected. On the left, there is a sidebar with various icons and a 'SD' label. A red arrow points from the 'SD' label to the gear icon in the sidebar. Another red arrow points from the gear icon to the 'Users' link in the main list, which is circled in red. The main list contains many other configuration items like 'Accommodation Categories', 'Appointment Types', 'Logs', etc.

3. Search for the required user and **Double Click** on their name

The screenshot shows the 'SETTINGS > USERS' page. It displays a table with one user record. The user has ID 8, Surname 'User', First Name 'Test', Email 'testuser@alturahealth.com.au', Group 'Super Users', SSO status checked, 2FA App status checked, Last Login '09/06/2024', and Status 'Active'. A red circle highlights the 'Active' status box. The top right of the page has a search bar with 'user' and a '3' in a red circle, and a 'Add User' button.

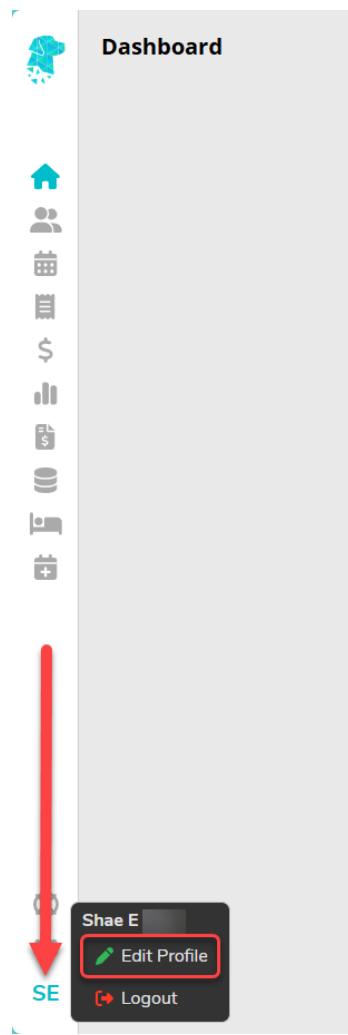
4. Click **Edit**
5. Untick the **Active** box
6. Click **Save**

7. Inactive users can always be viewed by utilising the **Show Inactive** option
8. Inactive users will be identified with an **Inactive Status**

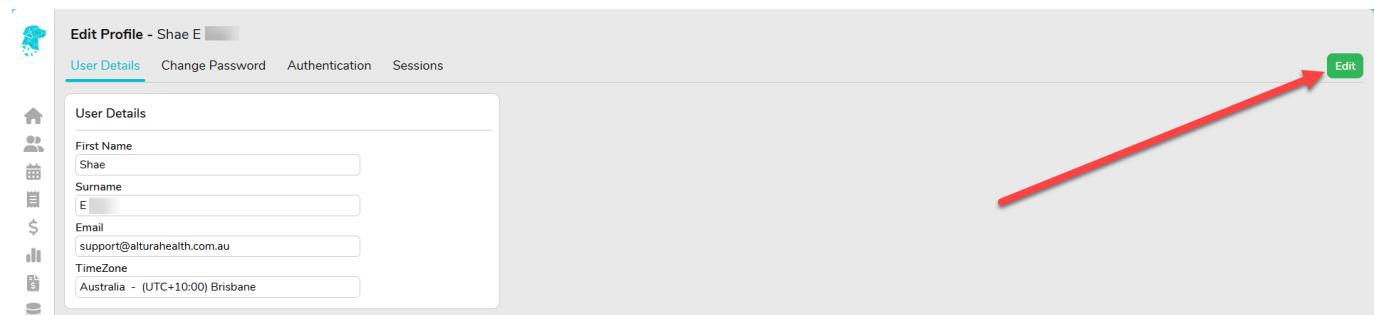
Updating a Username

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.

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

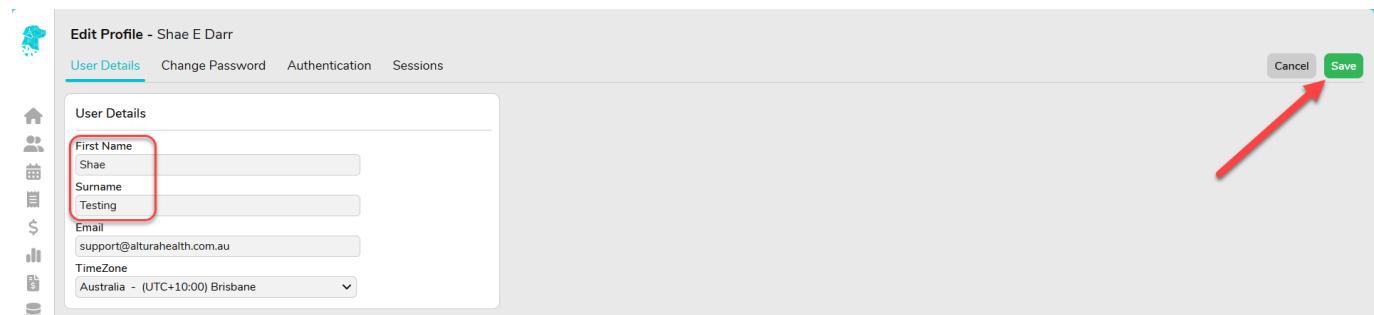


3. While on the **User Details** tab, select **Edit**



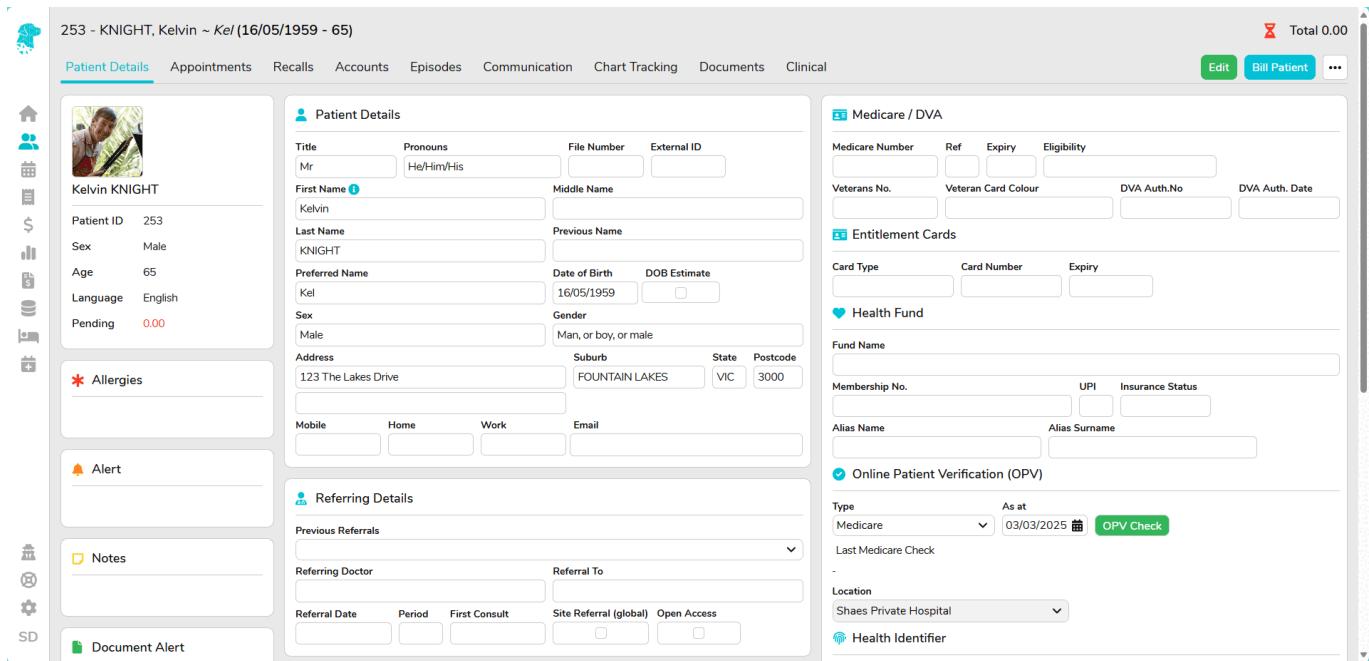
4. Amend the required **First Name** or **Surname** fields

5. Click **Save**



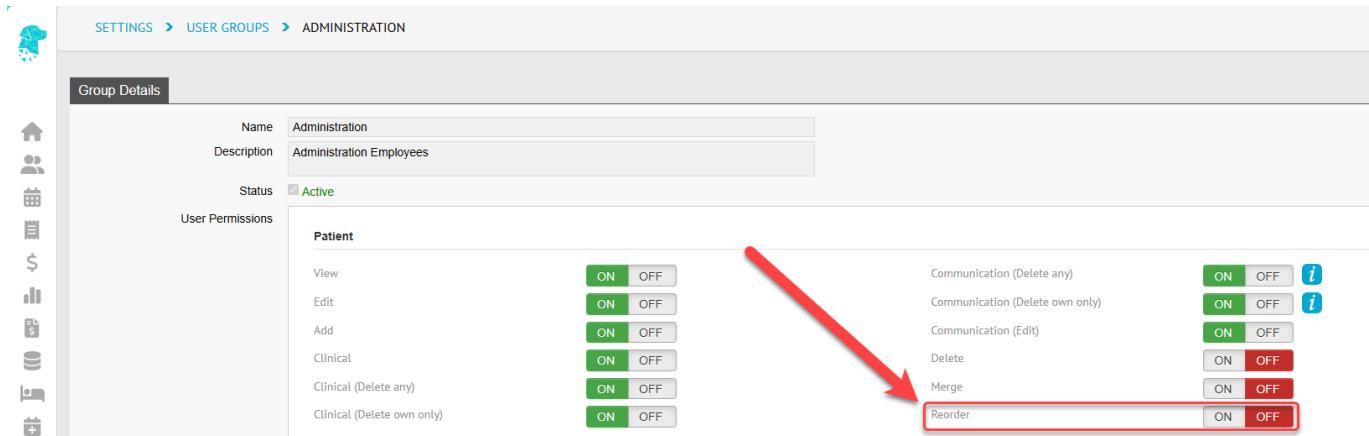
Re-Order Patient Screen

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



The screenshot shows a patient record for Kelvin Knight. The layout is customized with sections like 'Allergies' and 'Alert' on the left. The 'Patient Details' section includes fields for Title, Pronouns, First Name, Middle Name, Last Name, Preferred Name, Date of Birth, Sex, Address, Suburb, State, Postcode, Mobile, Home, Work, and Email. The 'Medicare / DVA' section contains fields for Medicare Number, Ref, Expiry, Eligibility, Veterans No., Veteran Card Colour, DVA Auth.No, and DVA Auth.Date. Other sections include 'Entitlement Cards', 'Health Fund', 'Online Patient Verification (OPV)', and 'Health Identifier'.

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



The screenshot shows the 'Group Details' section for the 'Administration' user group. The 'Patient' permissions section includes checkboxes for View (ON), Edit (ON), Add (ON), Clinical (ON), Clinical (Delete any) (ON), Clinical (Delete own only) (ON), Communication (Delete any) (ON), Communication (Delete own only) (ON), Communication (Edit) (ON), Delete (ON), Merge (ON), and Reorder (ON). A red arrow points to the 'Reorder' permission.

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.

253 - KNIGHT, Kelvin ~ Kel/ (16/05/1959 - 65)

Patient Details Appointments Recalls Accounts Episodes Communication Chart Tracking Documents Clinical

Patient Details

First Name: Kelvin
Last Name: KNIGHT
Preferred Name: Kel
Sex: Male
Date of Birth: 16/05/1959
DOB Estimate:
Gender: Man, or boy, or male

Medicare / DVA

Medicare Number: Ref: Expiry: Eligibility:
Veterans No.: Veteran Card Colour: DVA Auth.No:

Entitlement Cards

Card Type: Card Number: Expiry:
Fund Name:

Health Fund

Edit Patient
Bill Patient: B
OPV: V
OEC: O
Label: L
Merge: M
Picture: P
Audit Logs: A
Reorder Content: F9
EMR: F9
Delete Patient: D

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

Reorder Content

Left Side

- Patient Details
- Referring Details
- Other Information

Right Side

- Medicare / DVA / HF Details
- Other Contacts
- Community Nursing

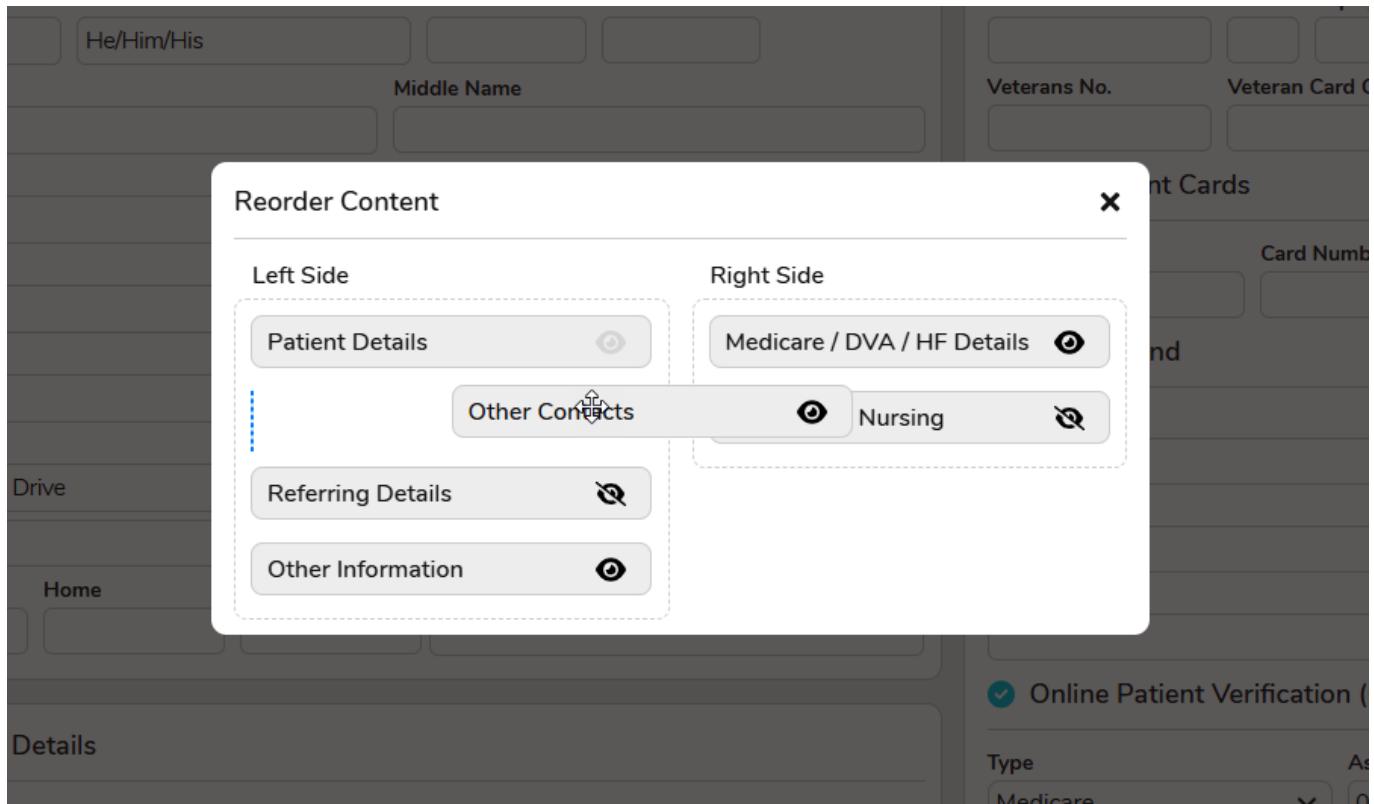
Buttons

- Reset Order
- Cancel
- Save Order

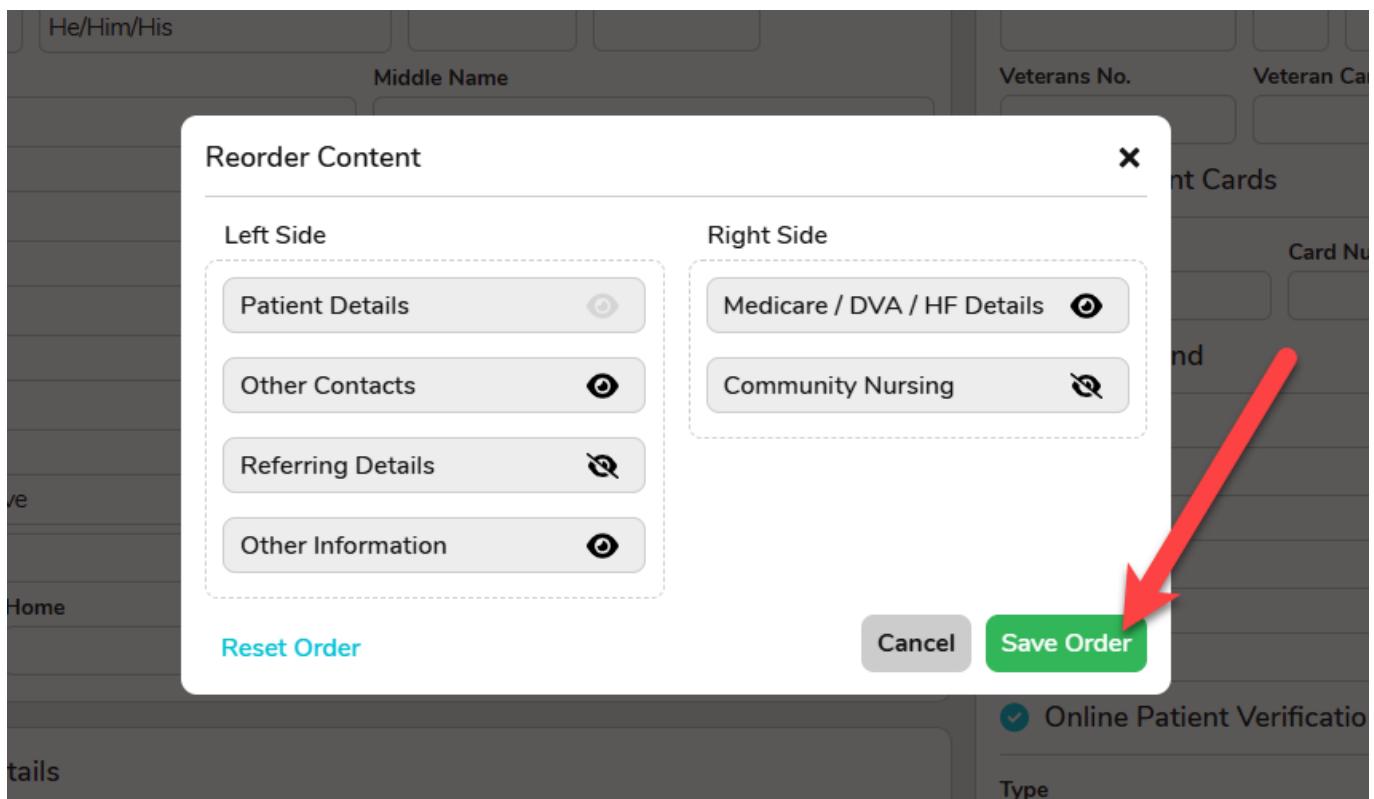
Checkboxes

- Online Patient Verification (OPV):
- Type: Medicare
- As at: 02/03/20

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!

support@alturahealth.com.au

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**

SETTINGS

General

- Accommodation Categories
- Appointment Types
- Area Codes
- Band Mappings
- Booking Codes
- Cancelled Reasons (Appointments)
- Cancelled Reasons (Theatre Rosters)
- Chart Location
- Checkers - Letters
- Departments
- Deposit Types
- Doctors
- Doctor Specialities
- Document Types
- ECLIPSE Mapping
- Health Funds
- Health Fund Participants
- Hospitals
- Invoice / IFC Messages
- Items
- Item Types
- Locations

- Logs
- Nurse List
- Pathology Providers
- Practices
- Printer and Scanner Configuration
- Program Numbers
- Recall Reasons
- Referral Types
- Referring Doctors
- Security
- **SMS Automation** (Red box and circle 2)
- SMS History
- Staff Roles
- Survey
- System Configuration
- Templates
 - Clinical Note Template
 - SMS Templates
 - Templates
- Theatre Hold Reasons
- Third Parties
- Theatre Reason for Delayed Finish
- Theatre Reason for Delayed Start
- User Groups
- Users
- Webhooks

3. Click Add SMS Automation

Settings / SMS Automation

Condition	Template	Days After/Before	Send At	Location	Doctor/Theatre	Action
No auto sms found						

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**

SMS Automation

Condition
To Confirm Appointment 4

Template
Pre-Admission Text 5

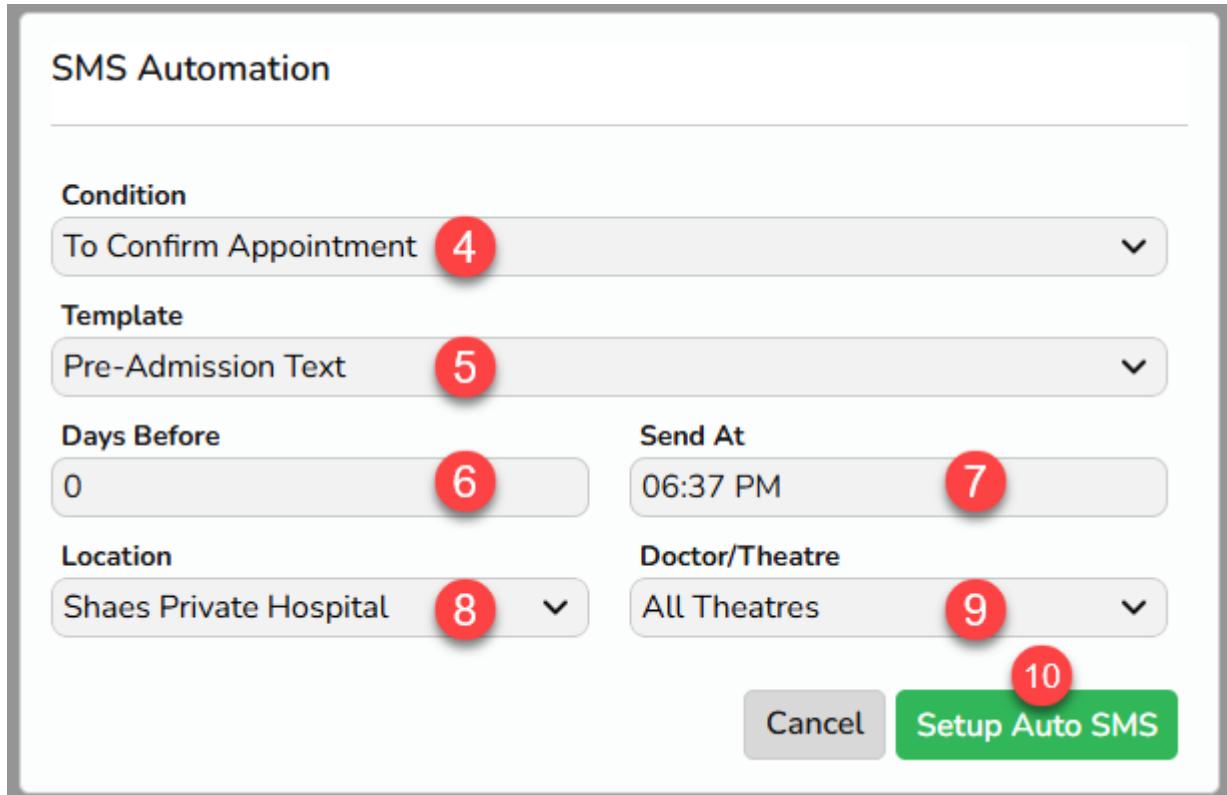
Days Before
0 6

Send At
06:37 PM 7

Location
Shaes Private Hospital 8

Doctor/Theatre
All Theatres 9

Cancel 10 Setup Auto SMS



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.

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.

SMS Automation

Condition
To Confirm Appointment

Template
Pre-Admission Text

Days Before 2	Send At 09:00 AM
-------------------------	----------------------------

Location
Shaes Private Hospital

Doctor/Theatre
All Theatres

Cancel **Setup Auto 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.

SMS Automation

Condition
Post Discharge

Template
Post-Operative Message

Days After 1	Send At 09:00 AM
------------------------	----------------------------

Location
Shaes Private Hospital

Doctor/Theatre
All Theatres

Cancel **Setup Auto SMS**

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.

SMS Automation

Condition
Admission Form Not Received

Template
Preadmit Paperwork Reminder

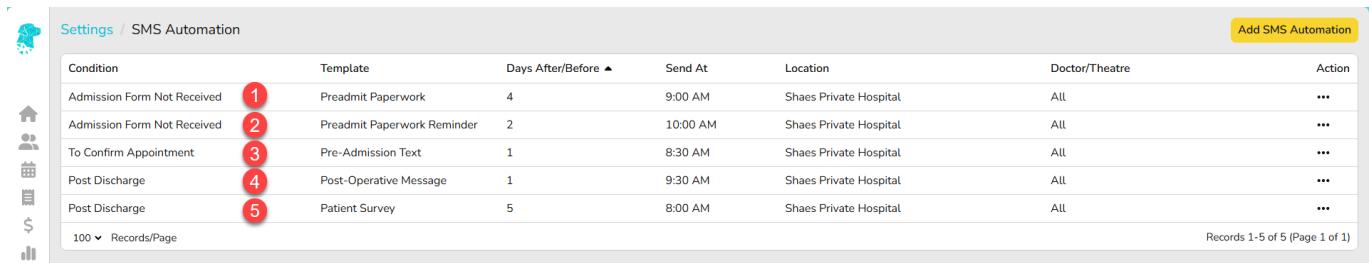
Days Before	Send At
1	08:00 AM
Location	Doctor/Theatre
Shaes Private Hospital	All Theatres

Cancel **Setup Auto SMS**

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!

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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	...

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)

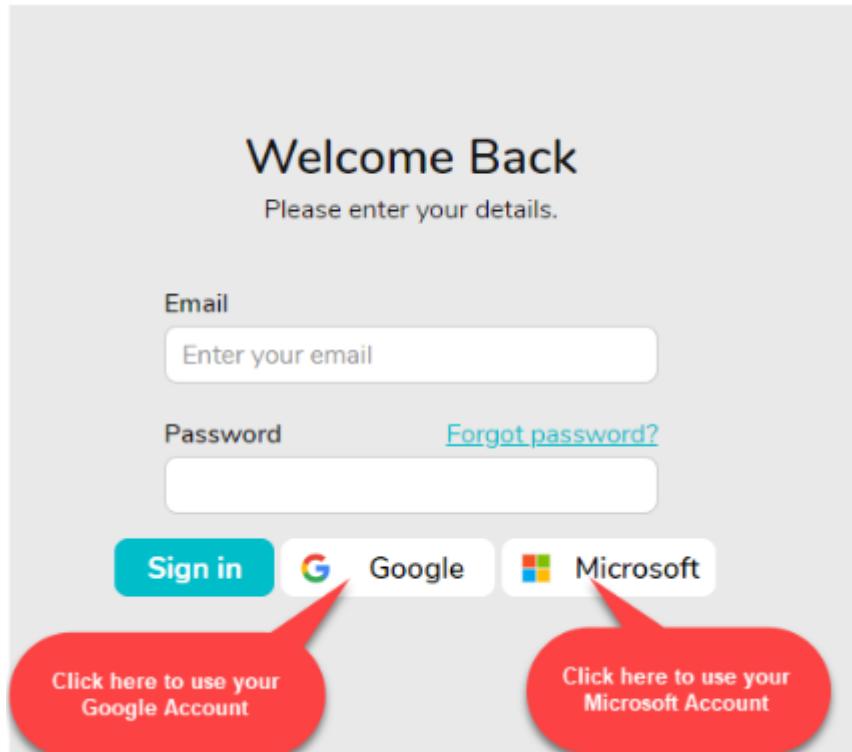
Asking for feedback via a patient survey is a great way to gather insights on their experience and identify any areas for improvement. Giving them a little time to settle into their recovery before asking for feedback might result in more thoughtful responses. Automating this follow up ensures all patients 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.



Pick an account

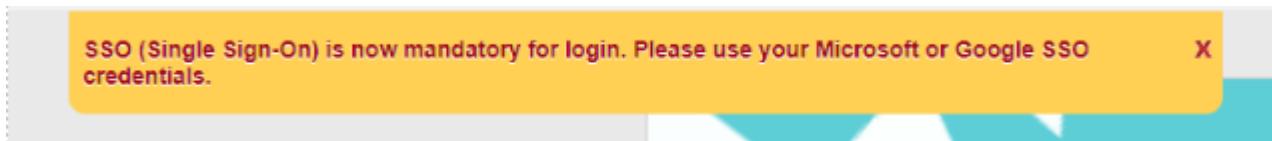


John Citizen
johncitizen@daysurgery.com.au
Connected to Windows



Use another account

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.

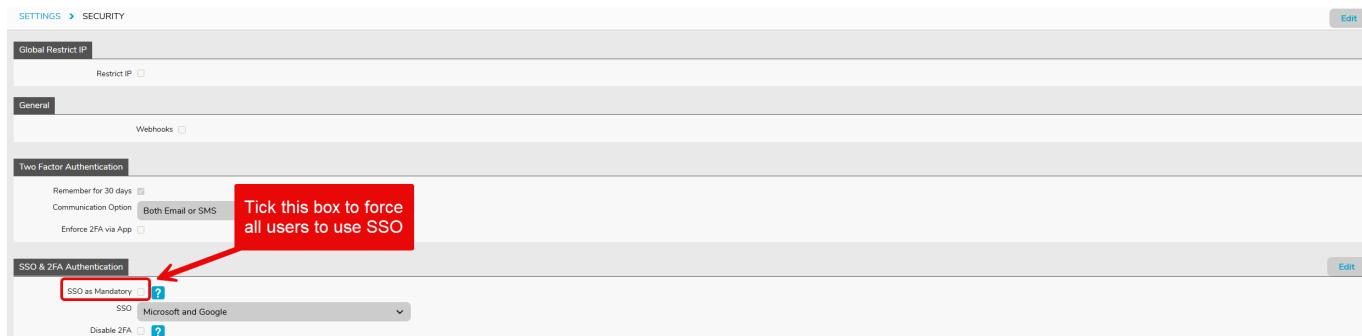
How to enforce SSO in FYDO

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**.

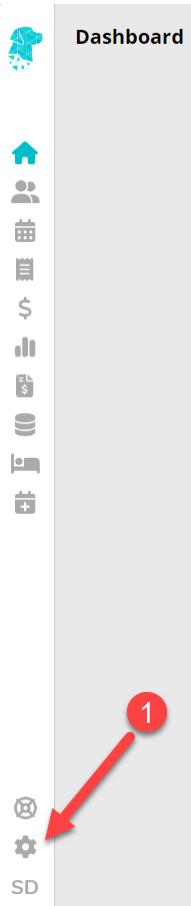
Group	SSO	2FA App	Last Login
Subscriber	✓		04/12/2025
Full Access	✓		22/10/2025
Admin Management	✓		03/12/2025
Administration	✓		04/12/2025
Administration	✓		04/12/2025
Administration	✓		09/09/2025
Full Access	✓		19/09/2025
Clinical Staff	✓		21/10/2025
Clinical Staff	✗		-
Clinical Staff	✓		01/12/2025
Clinical Staff	✓		04/12/2025
Clinical Staff	✓		02/12/2025
Clinical Staff	✓		02/12/2025
Clinical Staff	✗		-
Clinical Staff	✓		04/12/2025
Clinical Staff	✗		-
Clinical Staff	✓		03/12/2025
Clinical Staff	✓		29/08/2025
Clinical Staff	✗		-
Clinical Staff	✗		-
Clinical Staff	✓		03/10/2025
Clinical Staff	✗		-
Clinical Staff	✗		-
Clinical Staff	✗		-
Clinical Staff	✗		-

- **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

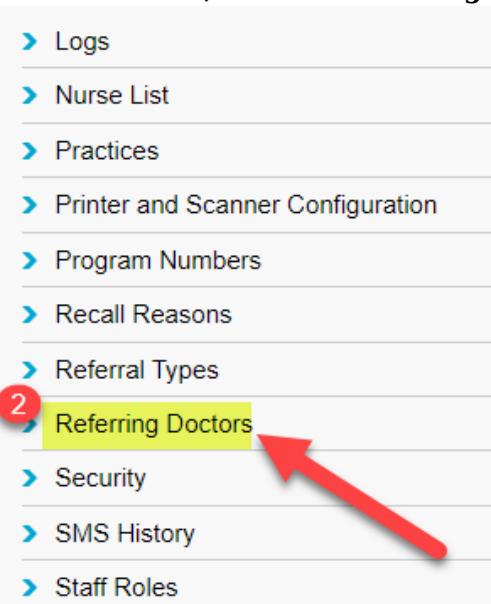
Exporting Referring Doctors/Practices

How to Export Referring Doctors:

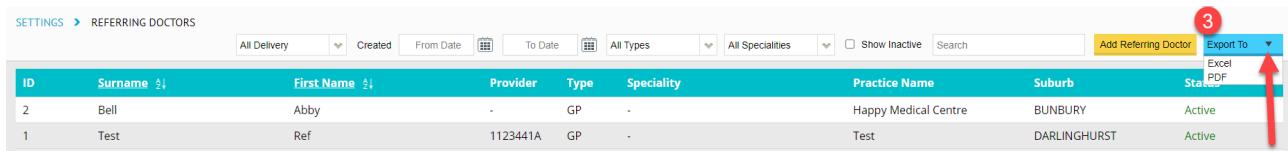
1. Click on **Settings**



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



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



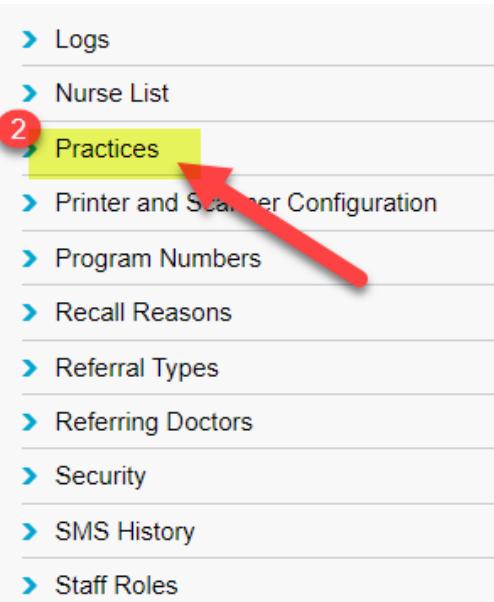
REFERRING DOCTORS								
ID	Surname	First Name	Provider	Type	Specialty	Practice Name	Suburb	Status
2	Bell	Abby	-	GP	-	Happy Medical Centre	BUNBURY	Active
1	Test	Ref	1123441A	GP	-	Test	DARLINGHURST	Active

How to Export Practices:

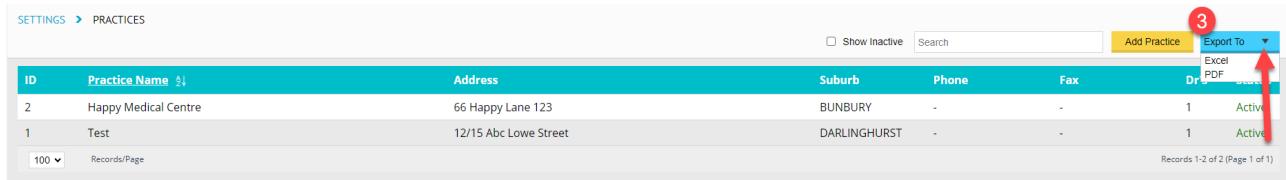
1. Click on **Settings**



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



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



ID	Practice Name	Address	Suburb	Phone	Fax	Dr	PDF
2	Happy Medical Centre	66 Happy Lane 123	BUNBURY	-	-	1	Active
1	Test	12/15 Abc Lowe Street	DARLINGHURST	-	-	1	Active

100 Records/Page

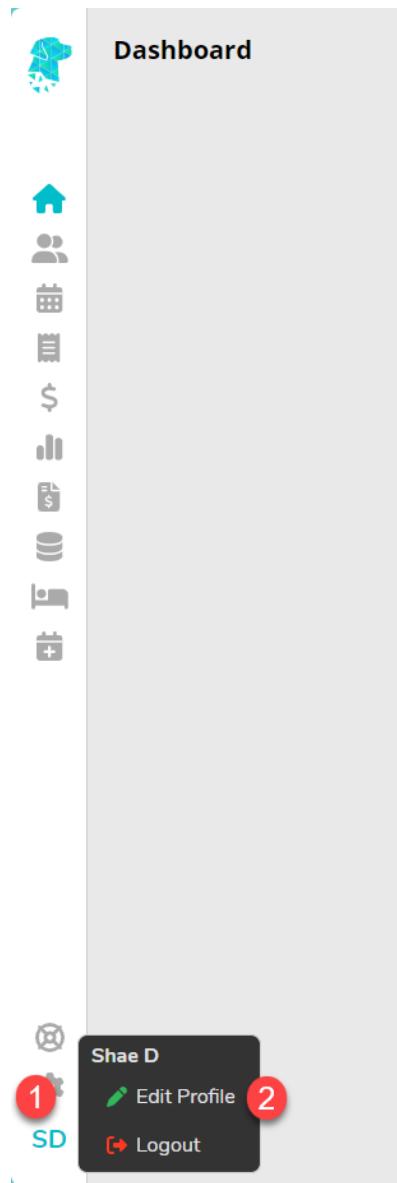
Records 1-2 of 2 (Page 1 of 1)

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**

A screenshot of the 'Edit Profile' page. The top navigation bar includes 'Edit Profile', 'User Details' (which is underlined in blue), 'Change Password', 'Authentication', and 'Sessions'. A red circle with the number '3' is on the 'Edit' button in the top right corner. The 'User Details' section contains fields for 'First Name' (with a gray placeholder), 'Surname' (with a gray placeholder), 'Email' (containing '@alturahealth.com.au' with a red circle '4' over it), and 'TimeZone' (set to 'Australia - (UTC+10:00) Brisbane').

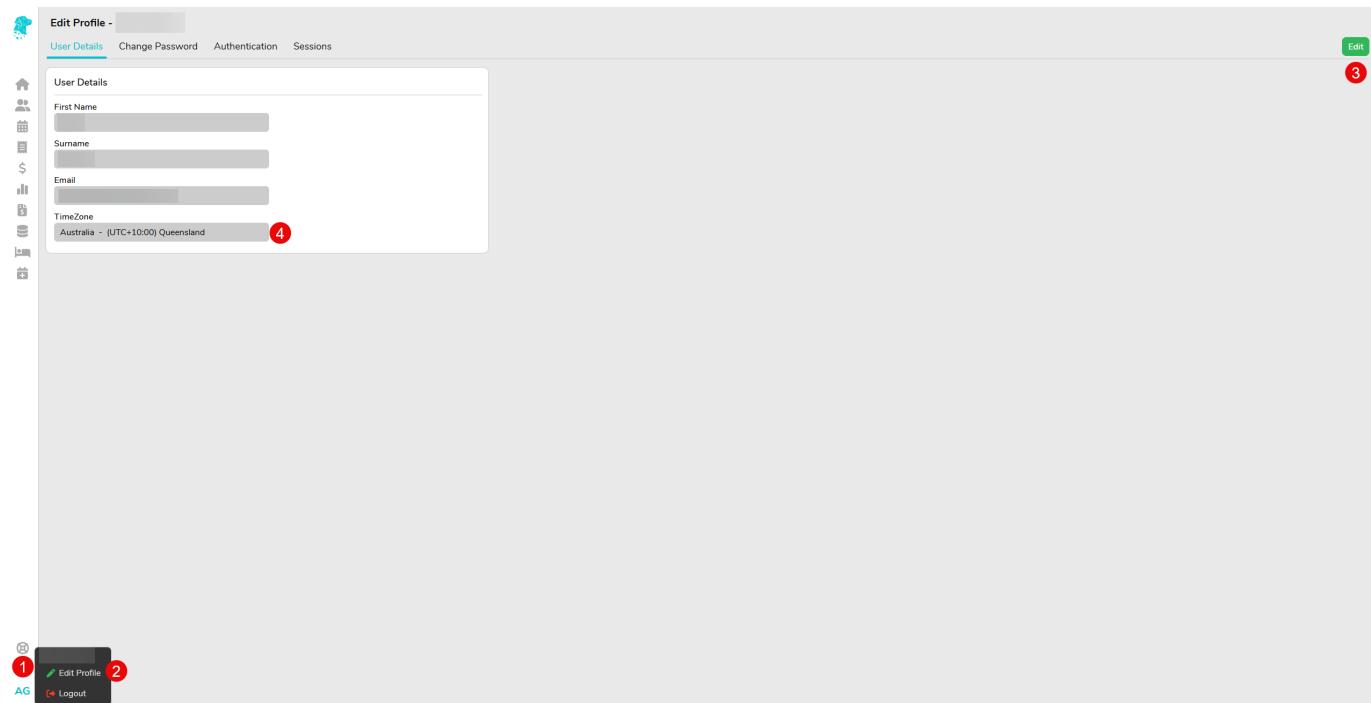
The new email address will need to be used for log ins from there on.

How to change user's timezone

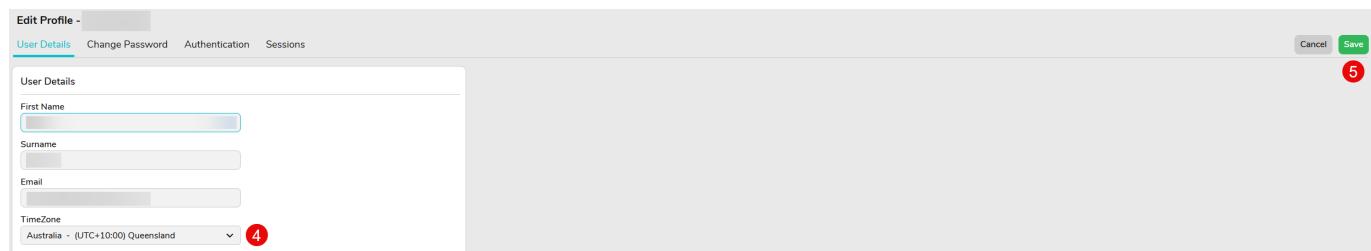
Need to change your timezone? Read on to learn how!

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.

Add SMS Template

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

ID	4
Type	Appointments
Name	Appointment Reminder
Description	Hi <<patfirstn>>, this is a reminder of your appointment at the <<ListLocName>> breast screening clinic on <<listdate>> at <<listtime12h>>.

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.

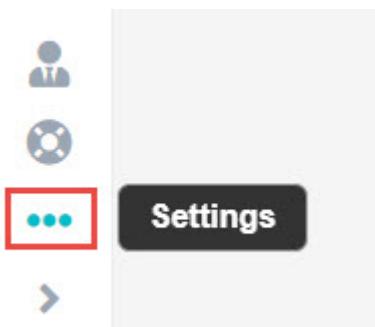
Save

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.

Add Item

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

Item Details	
Number	1
Procedure Name	
Notes	I
Link Procedures	

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

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

Save

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)