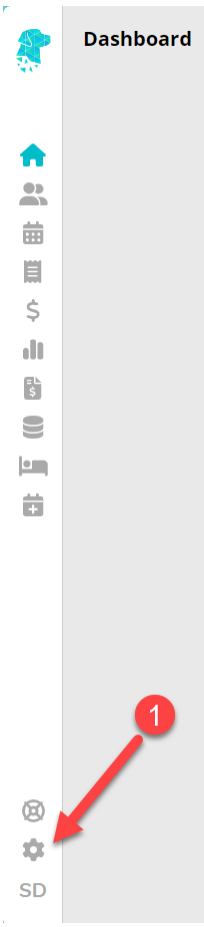
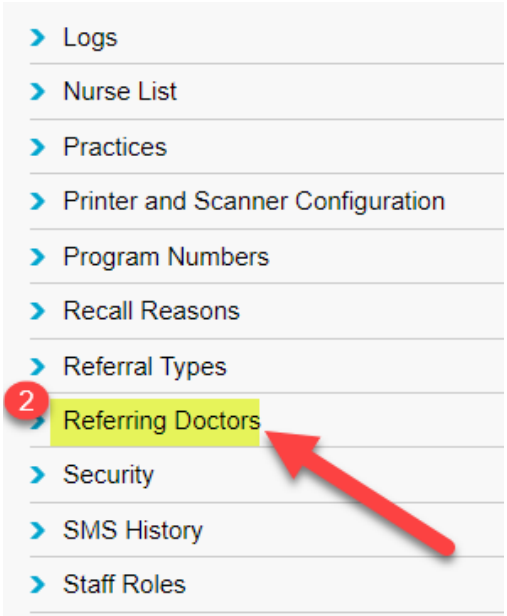
Exporting Referring Doctors/Practices

How to Export Referring Doctors:

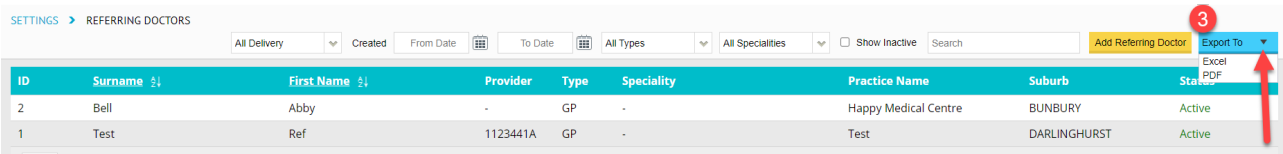
1. Click on **Settings**



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

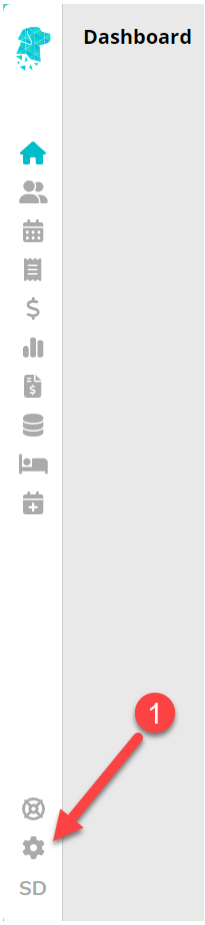


3. Click the **Export To** button and choose either **Excel** or **PDF**.

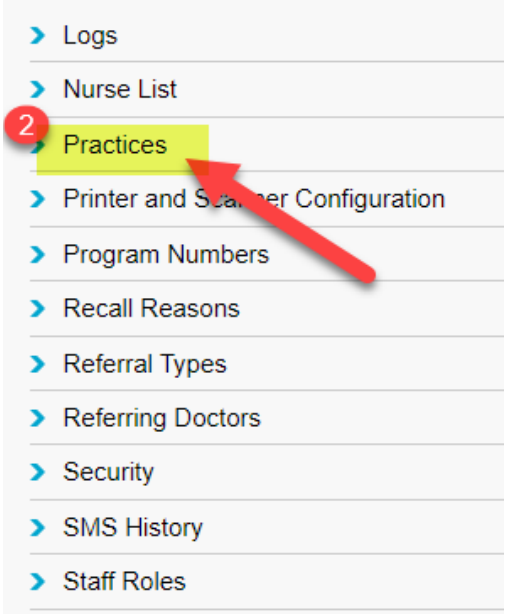


How to Export Practices:

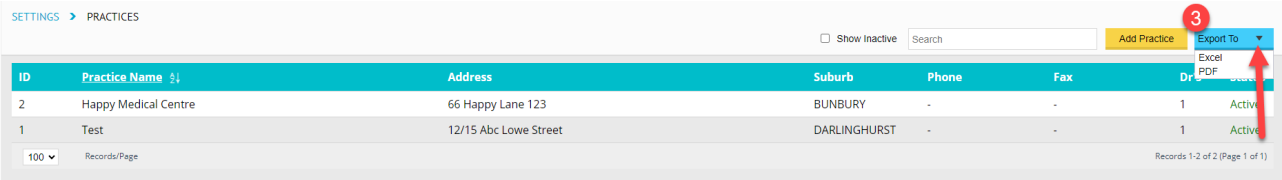
1. Click on **Settings**



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



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



Payments Report (Clinic)

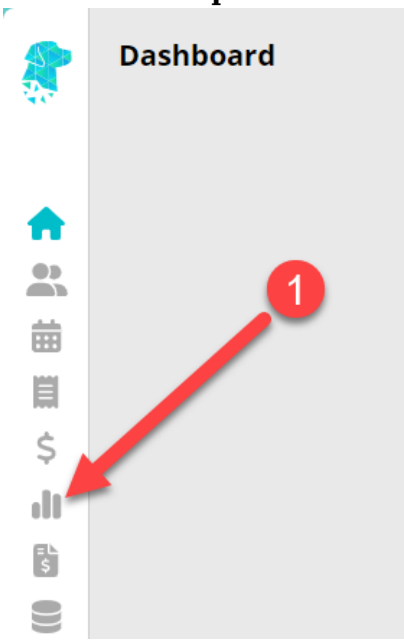
This report gives a list of all payments received in the selected date period either by Accounting Period, Audit Date or Date of Service. The data is able to be shown in formats such as Detailed, Summary and Summary Categories.

Filter options include:

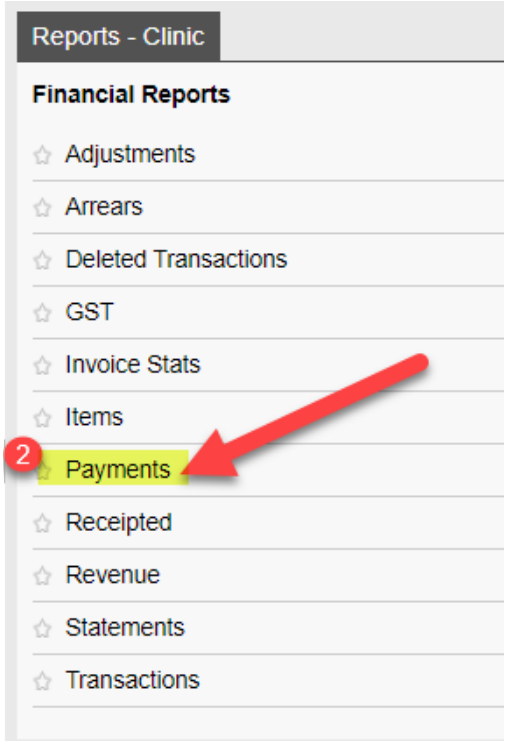
- Location
- Department
- Doctor
- Payment Type
- Group By options
- From and To Date Range

How to Print/Export the Payments Report:

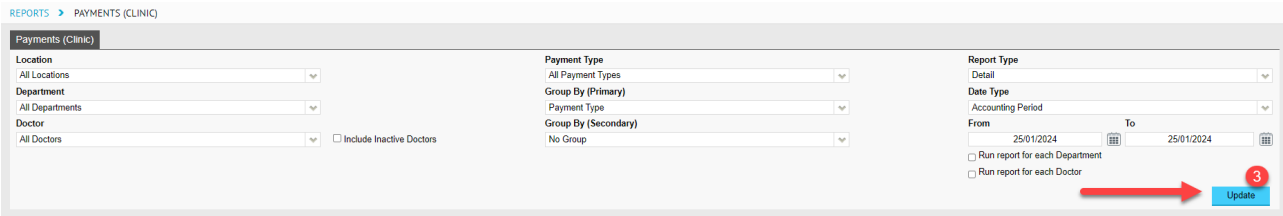
1. Click on the **Reports Icon**



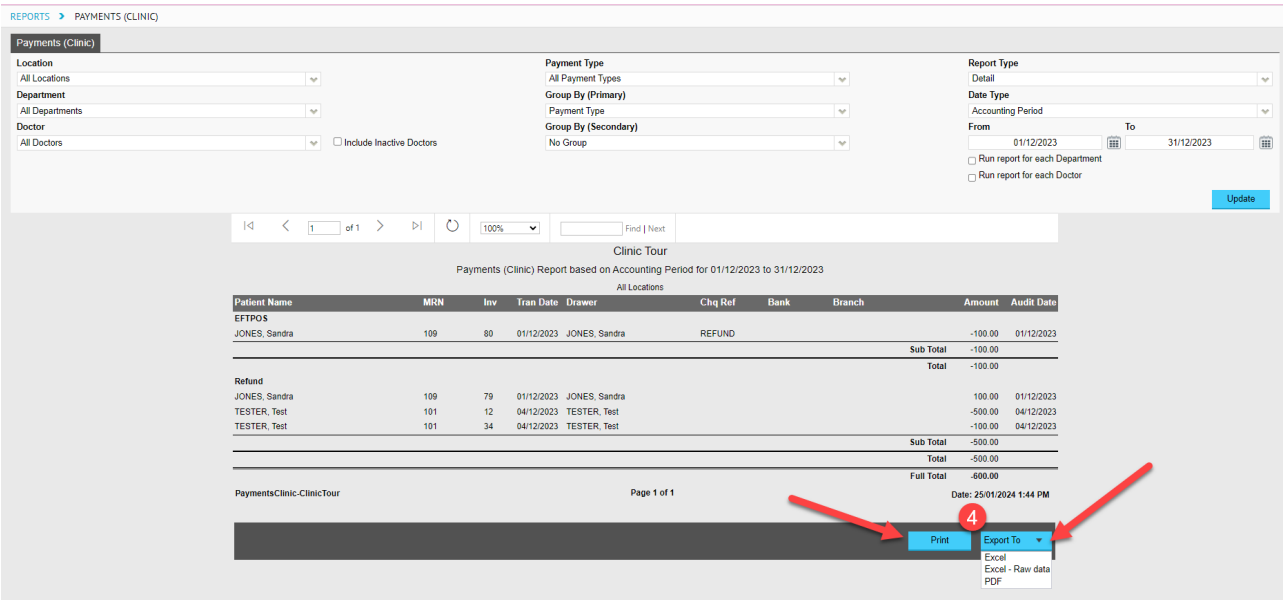
2. Under **Reports - Clinic**, Click on **Payments**



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**.



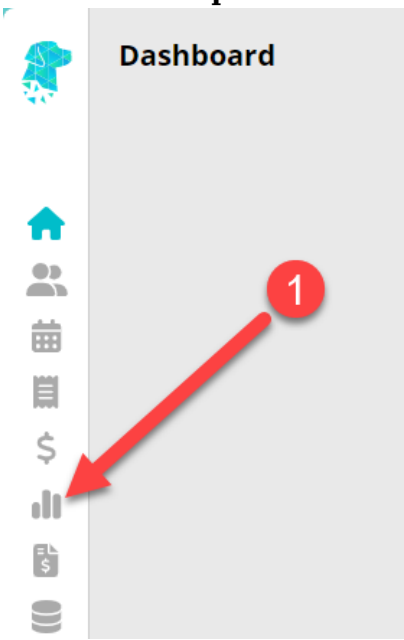
Patient Stats Report

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

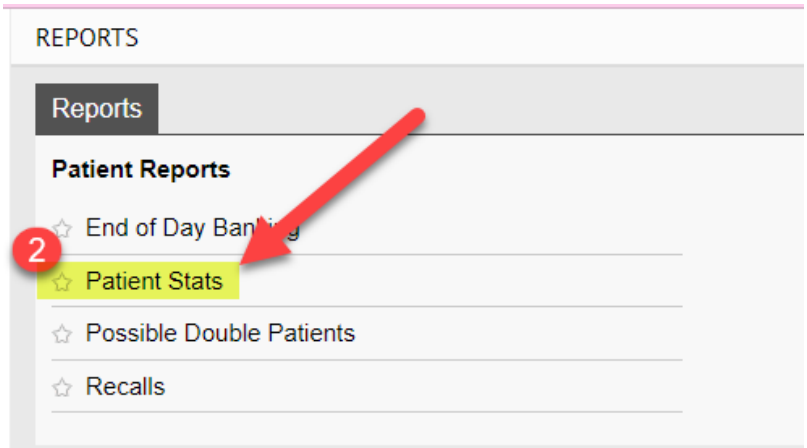
- Medicare Patients
- Deceased Patients
- Archived Patients
- DVA Patients
- Indigenous Status
- Referral Expired
- Preferred Doctor
- Health Fund
- Gender
- Surveys
- Ability to stipulate Birth date range
- Ability to stipulate Created range
- Ability to stipulate Postcode range
- Community Nursing Cycle
- Ability to stipulate Billed range
- Doctor

How to Print/Export the Patient Stats Report:

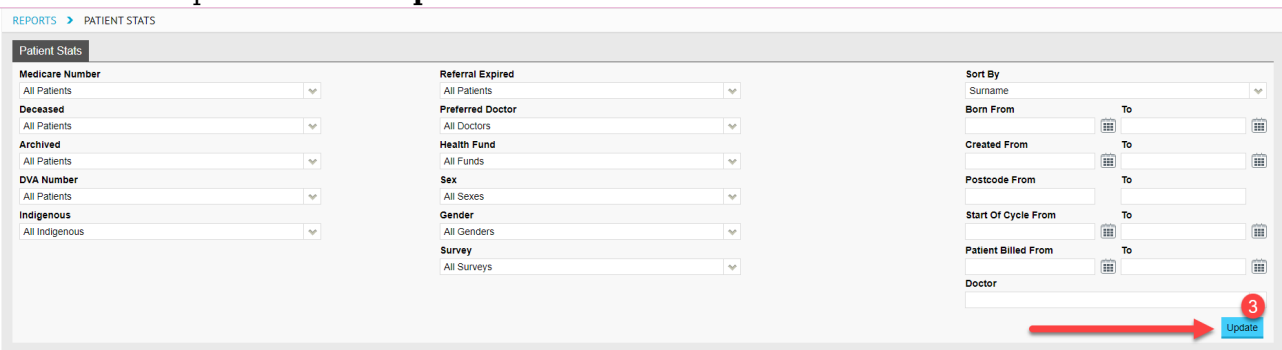
1. Click on the **Reports Icon**



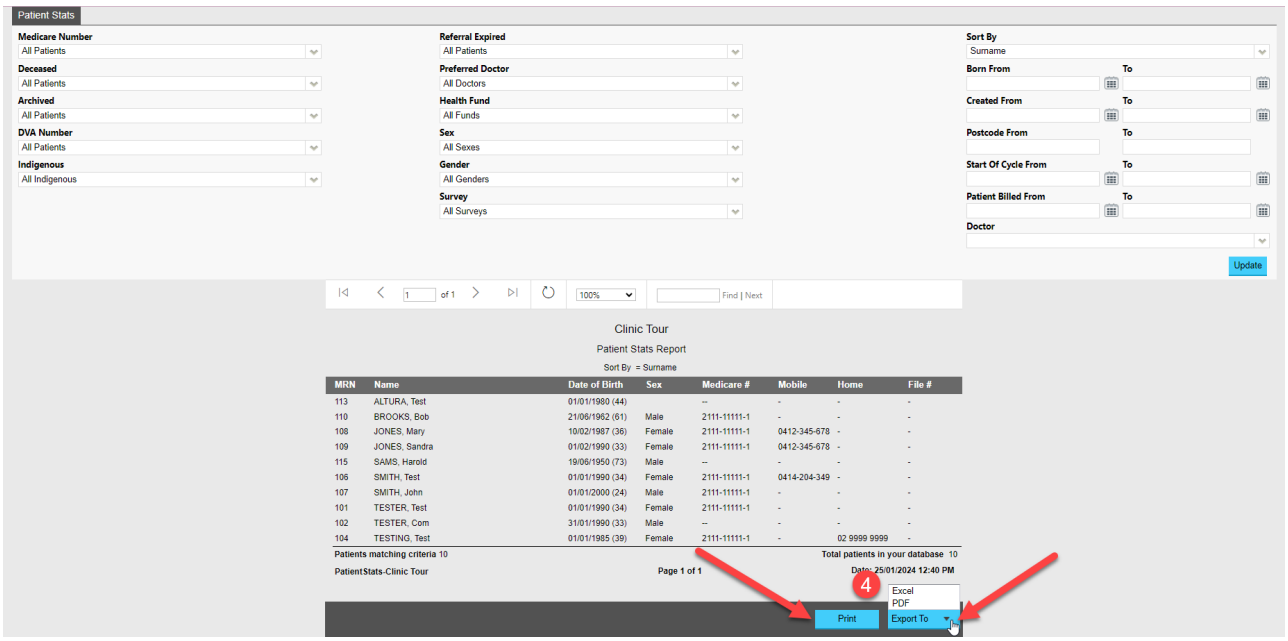
2. Under **Patient Reports**, Click on **Patients Stats**



3. Change filters as required, or if you are wanting <u>All Patient Demographics</u>, 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**.



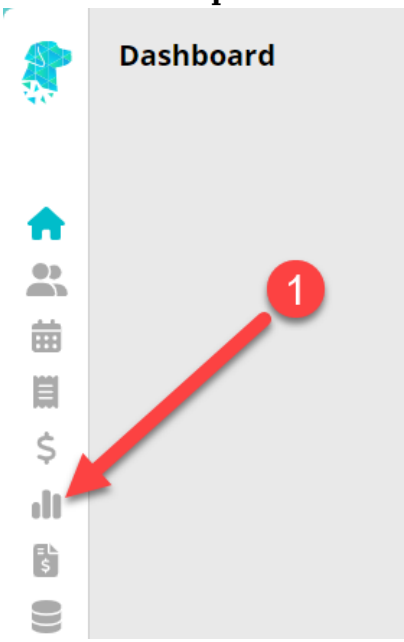
Arrears Report (Clinic)

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:

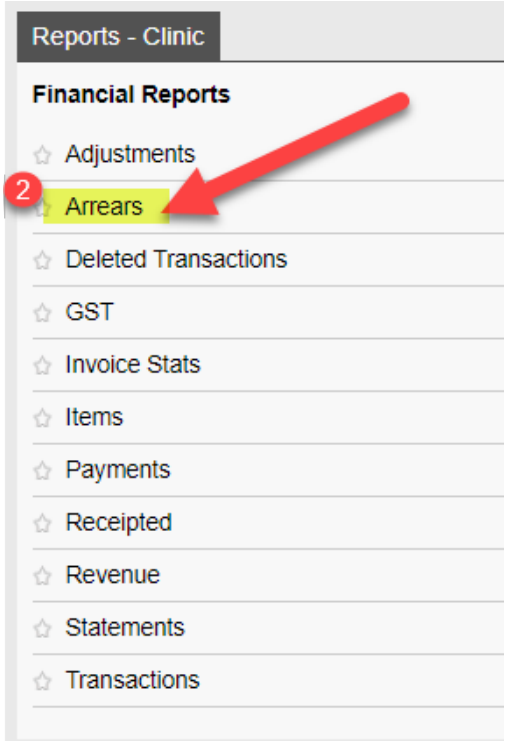
1. **Detail** – Showing every patient and the balance
2. **Summary** – Showing each bill type and the balance
3. **Interactive** – Enabling follow up dates and notes to be accessible, to facilitate efficient workflow in debt recovery

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

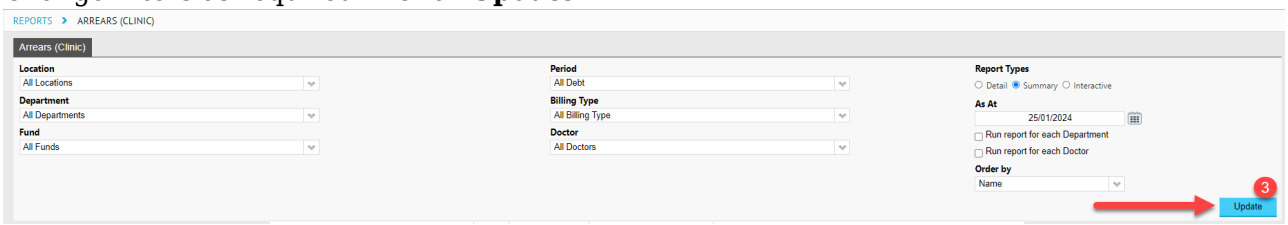
1. Click on the **Reports Icon**



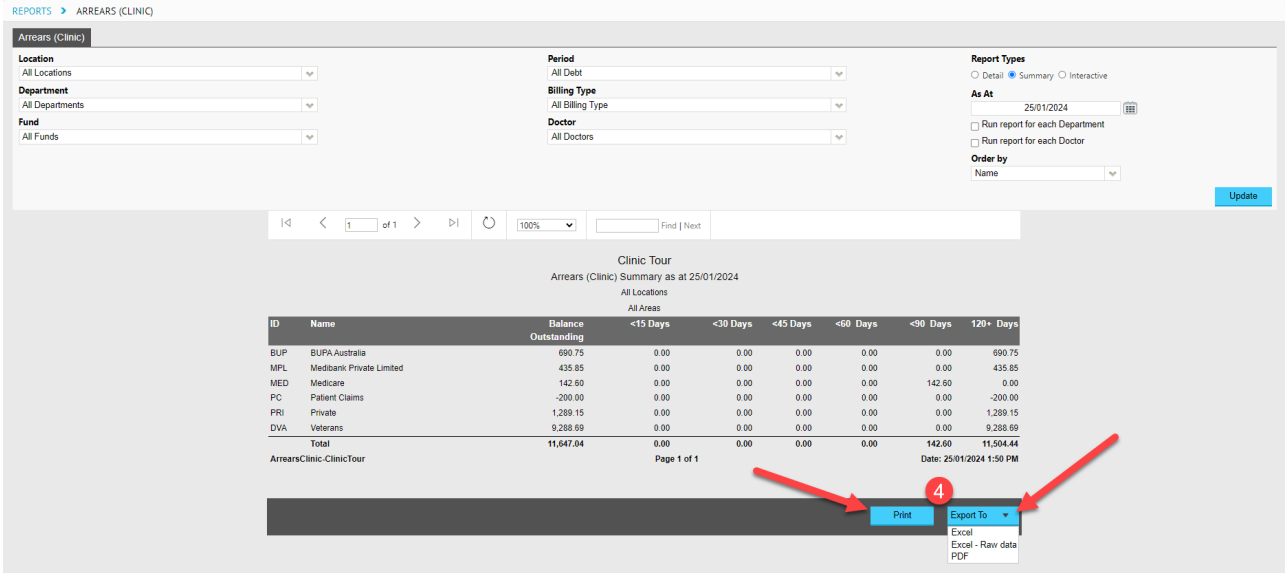
2. Under **Reports – Clinic**, Click on **Arrears**



3. Change filters as required > Click **Update**

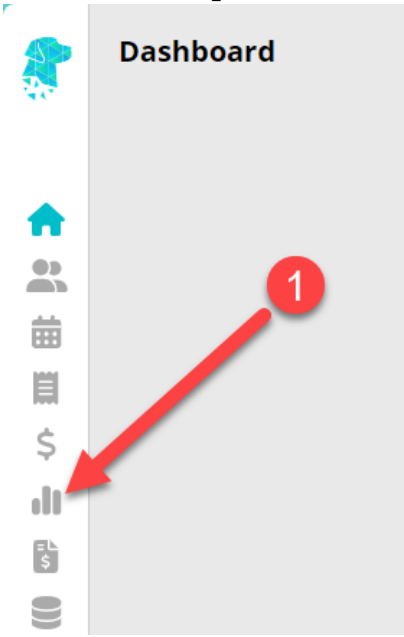


4. Report will generate below the filters section.
   To **Print** the report, Click the **Print** button.
   To **Export** the report, Click the **Export To** button and choose either **Excel**, **Excel - Raw Data** or **PDF**.

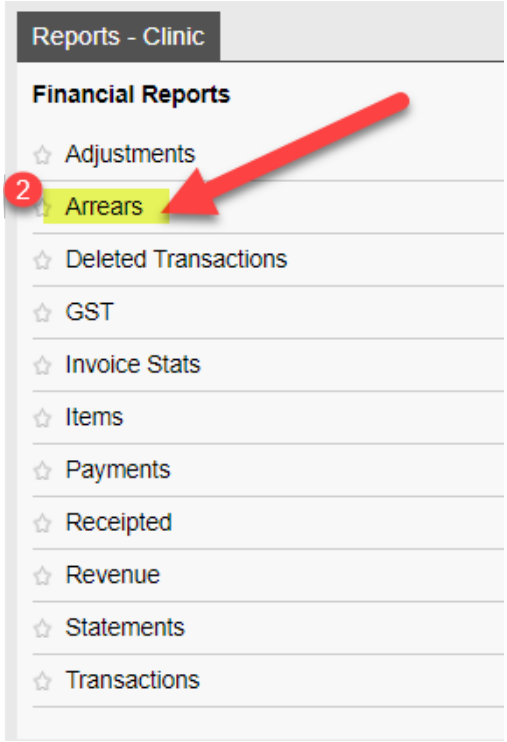


How to Export the Arrears Report *(Interactive)*:

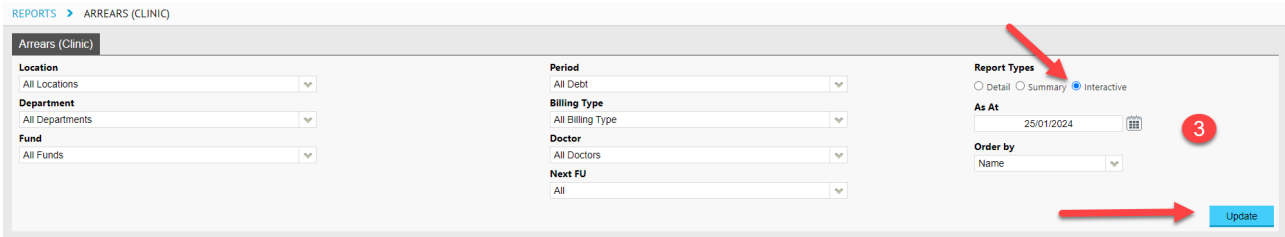
1. Click on the **Reports Icon**



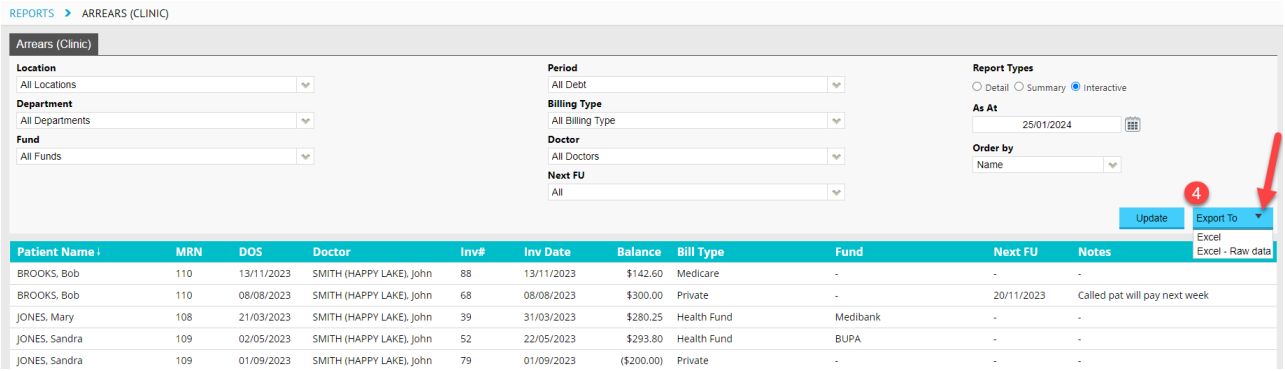
2. Under **Reports – Clinic**, Click on **Arrears**



3. Select **Interactive** > Change filters as required > Click **Update**



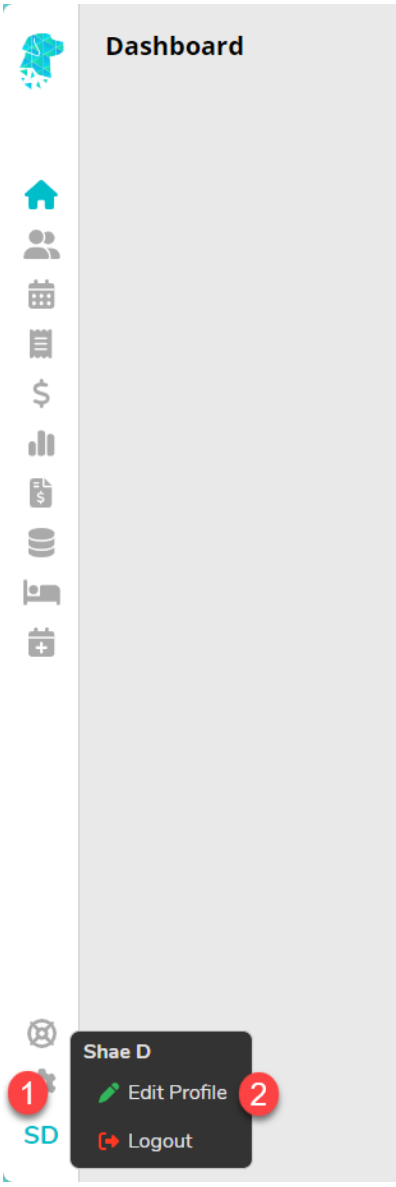
4. Report will generate below the filters section.
   Click the **Export To** button and choose either **Excel** or **Excel – Raw Data**.



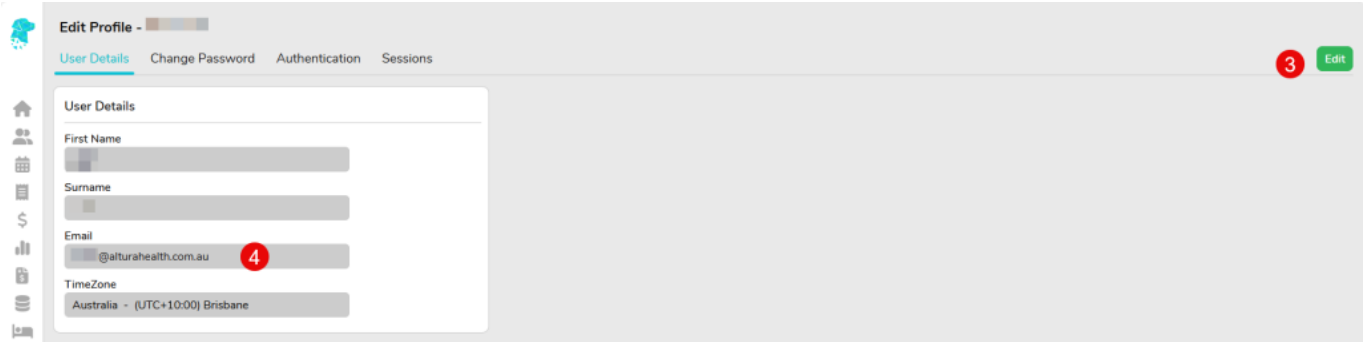
Amending a User's Email Address

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**



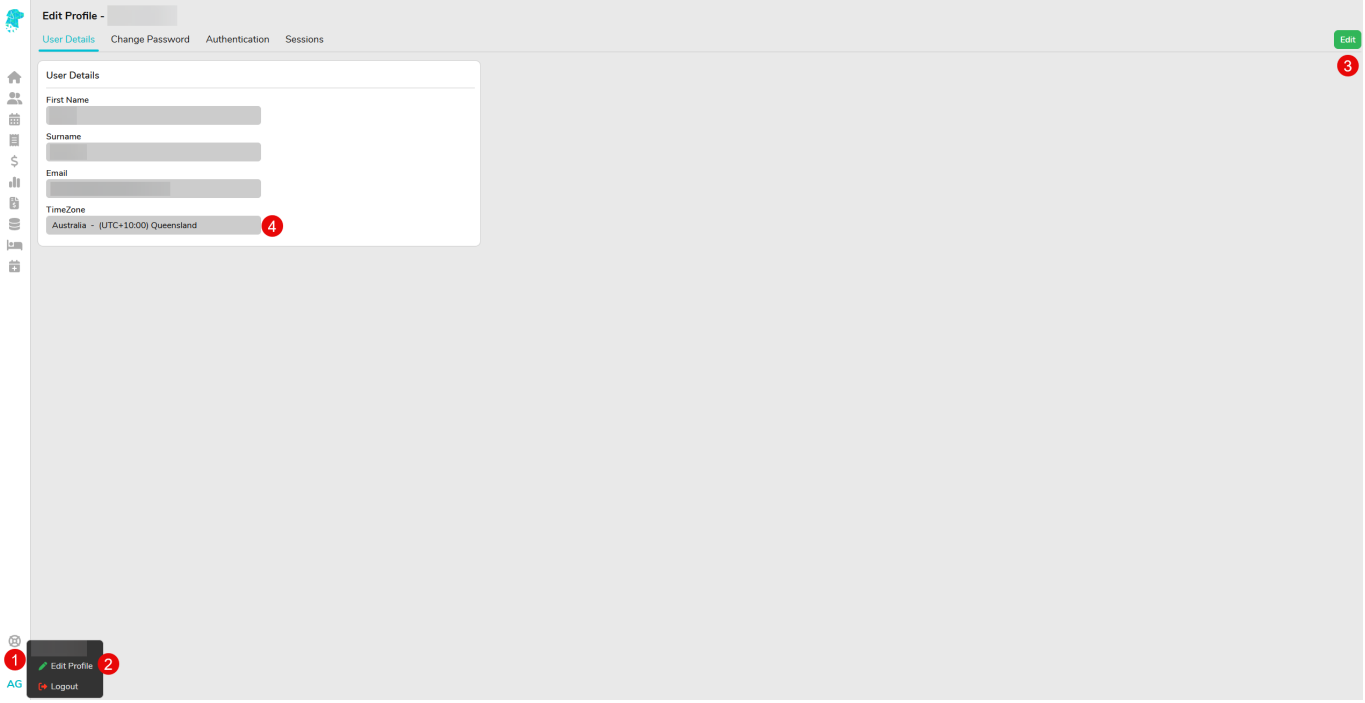
The new email address will need to be used for log ins from there on.

How to change user’s timezone

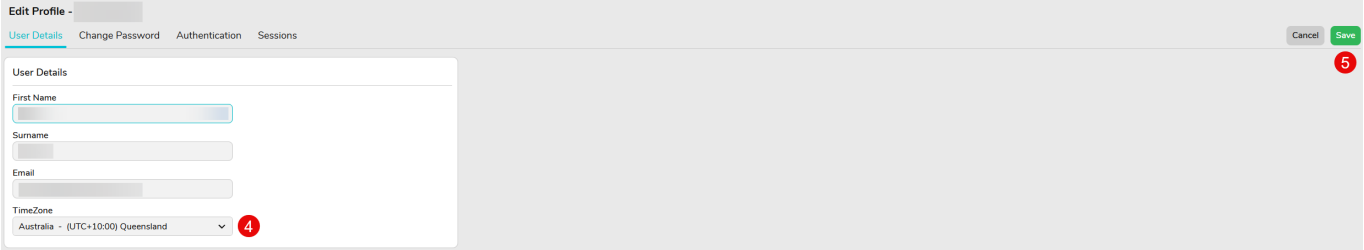
Need to change your timezone? Read on to learn how!

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.***



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

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	

Tokens – Documents & Letters

Token Name	Data	Notes
<<DocFullName>>	Doctor Full Name	eg. SMITH, John
<<DocFirstname>>	Doctor First Name	eg. John
<<DocSurname>>	Doctor Second Initial	eg. SMITH
<<DocTitle>>	Doctor Title	
<<DocID>>	Doctor ID	
<<DocAdd1>>	Doctor Address 1	
<<DocAdd2>>	If Address Line 2 is empty, this will show Suburb State Postcode otherwise it will show Address Line 2	
<<DocAdd3>>	If Address Line 2 is empty, this will show nothing otherwise it will show Suburb State Postcode	
<<DocSuburb>>	Doctor Suburb	UPPERCASE
<<DocState>>	Doctor State	UPPERCASE
<<DocPC>>	Doctor Post Code	
<<DocMob>>	Doctor Mobile	9999 999 999
<<DocPh>>	Doctor Phone	99 9999 9999
<<DocFax>>	Doctor Fax	99 9999 9999
<<DocEmail>>	Doctor Email	

<<DocQualif>>	Doctor Qualification	
<<DocLoc>>	Doctor Location	
<<DocProv>>	Doctor Provider Number	
<<DocABN>>	Doctor ABN	
<<DocInvAs>>	Invoice As for Clinic	
<<DocAccName>>	Doctor Account Name	
<<DocBSB>>	Doctor BSB	
<<DocAccNum>>	Doctor Account Number	
<<DocBankAdd>>	Doctor Bank Address	
<<DocBank>>	Doctor Bank Name	
<<RefFullName>>	Referring Doctor Full Name	eg. SMITH, John
<<RefFirstName>>	Referring Doctor First Name	eg. John
<<RefSurname>>	Referring Doctor Surname	eg. SMITH
<<RefTitle>>	Referring Doctor Title	
<<RefID>>	Referring Doctor ID	
<<RefPractice>>	Referring Doctor Practice	
<<RefPracId>>	Referring Doctor Practice ID	
<<RefAdd1>>	Referring Doctor Address 1	
<<RefAdd2>>	If Address Line 2 is empty, this will show Suburb State Postcode otherwise it will show Address Line 2	
<<RefAdd3>>	If Address Line 2 is empty, this will show Suburb State Postcode otherwise it will show Address Line 2	
<<RefSuburb>>	Referring Doctor Suburb	UPPERCASE
<<RefState>>	Referring Doctor State	UPPERCASE
<<RefPC>>	Referring Doctor Postcode	
<<RefMob>>	Referring Doctor Mobile	9999 999 999
<<RefPh>>	Referring Doctor Phone	99 9999 9999
<<RefFax>>	Referring Doctor Fax	99 9999 9999
<<RefEmail>>	Referring Doctor Email	
<<RefQualif>>	Referring Doctor Qualification	
<<RefSpecID>>	Referring Dr Speciality ID	
<<RefSpec>>	Referring Dr Speciality Description	
<<RefLoc>>	Referring Doctor Location	
<<RefProv>>	Referring Doctor Provider Number	

Manually Updating Clinic Health Fund Fees

Whether it is Medicare, DVA, or Health Funds, FYDO keeps your item fees up to date, automatically.

Note: *Your FYDO system maintains the latest Medicare/ DVA fees by default. To enable automatic fee updates for the Health Funds, click on the link below:*

https://wiki.fydo.cloud/Health-Fund-Fees

Manually updating health fund fees

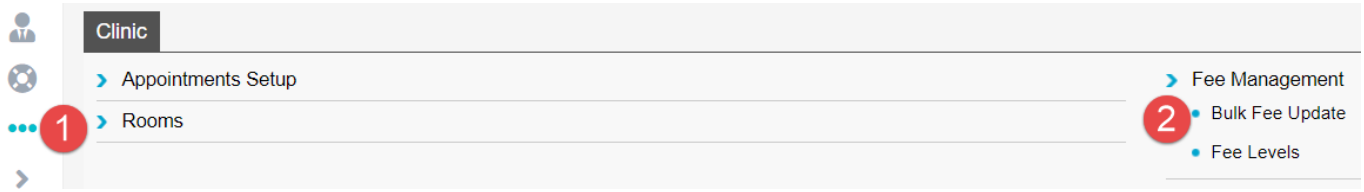
The manual procedure can only update fees for items that have already been added to your FYDO system. So, to prevent having to re-run the update for a given health fund, we recommend that you add all the items you need to bill *before* running the update.

Not sure how to add items? Click on the link below to learn how:

https://wiki.fydo.cloud/adding-mbs-items/

Ready to manually update your health funds fees? Let's get started!

First, go to **Settings** > **Bulk Fee Update**



You will now see the **Bulk Fee Update** screen where you will need to update *two* sets of fees for *each* health fund. The first set are the "Old fees/ codes" and the second set are the "Current fees/ code" (**To be updated in that order**).

1. The Old Fees are what will be charged for services where the *Date of Service* is prior to the introduction date of *new* fees for a given item.
2. The Current Fees are the **latest fees** and will be charged for services where the *Date of Service* is on or after when new fees were introduced for a given item.

SETTINGS > ITEMS > 110 - PROFESSIONAL ATTENDANCE AT CONSULT

Item Details

Number: 110
Procedure Name: Professional attendance at consult
Notes:
Link Procedures:
Category: 1 | Group: A4 | Sub
Item Type: | Qty on Hand: 0
Modal:
Rule: Dummy | 100% rebate | R
Active | Stock Item | A

Classifications - Hospital

Theatre Band (National):
Theatre Band (State):
Day Type:
Patient Class:
DVA Accommodation:
Same Day Accom Band 1 Override | Accom Item
Eclipse Code Mapping
ADA Code
Timebase

"Current fees" - Fee **after** threshold date of 01/02/2021

"Old fees" - Fee **prior to** threshold date of 01/02/2021

Fees Schedules - Clinic

		Current		Threshold	Old
Level	**Level Name**	**Fee ex GST**	**GST**	**Date**	**Fee ex GST**
0	DVA In-hospital	$ 217.95		01/02/2021	$ 217.95
1	MBS 100%	$ 157.95		01/02/2021	$ 157.95
2	Workers Comp	$ 0.00		01/01/2020	$ 0.00
3	Private Fee 3	$ 0.00		01/01/2020	$ 0.00
4	AHSA	$ 185.70		01/11/2020	$ 185.70
5	BUPA	$ 189.60		01/11/2020	$ 189.60
6	HCF	$ 189.90		01/11/2020	$ 189.90

In other words, every item has two fees – the current fee and the last fee before the current. Therefore, before we can update the current fees, we need to push them to the old fees.

Updating the old fees

There are a number of ways to update fees:

- Importing an Excel file – update fees from excel file
- Percentage – update fees as a percentage of the old or current fees
- Pricing – update fees by dollar amount

This blog post recommends using the percentage option. So, as shown in the screenshot below:

1. Set the *Update Fee Level* to: **the health fund** you wish to update fees for,
2. Set the *Codes* to: **Old Codes**,
3. Set the *Change Fee By*: to **Percentage**
4. Set the *Base Fee Level* to: **the same health fund** chosen in **step 1**
5. Set the *Percentage* to: **100.00**

FEES SETUP > BULK FEE UPDATE

Bulk Fee Update

Update Fee Level: 5 - BUPA
Codes: Old Codes
Change Fee By: Percentage
Base Fee Level: 5 - BUPA
Codes: Old Codes
Percentage (%): 100.00

Then, click the **Save** button

Save

This will replace the Old fees of all items for the selected health fund with the current value of the current fees.

Updating the current fees

Next, we must update the current fees; and we do this on the same screen as above. We will be updating the health funds fees by importing an Excel sheet.

As shown in the screenshot below:

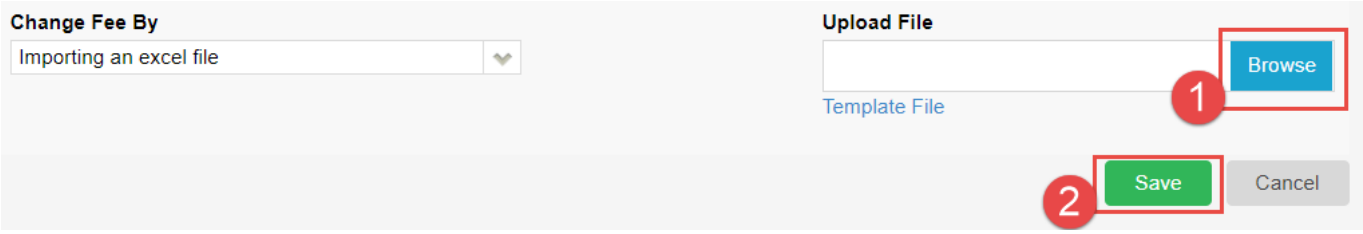
1. Set the *Update Fee level* to: **the health fund** you wish to update fees for,
2. Set the *Codes* to: **Current Codes**,
3. Set the *Change Fee By* to: **Importing an excel file**

Next, you'll need to download the excel file containing the fees for that health fund from our website at the link below:

https://au.acsshealth.com/healthfundfees/

Note: *Be sure to download the appropriate file based on your state (if applicable) and Gap or No Gap (if applicable).*

Once downloaded, browse for the file using the **Browse** button, select the file, and hit **Save**.



This will replace the Current fees of all items for the selected health fund with the latest fees released by the health fund, from the Excel sheet uploaded.

That's it! You have successfully updated the fees for the health fund. Repeat the process for as many funds as necessary.