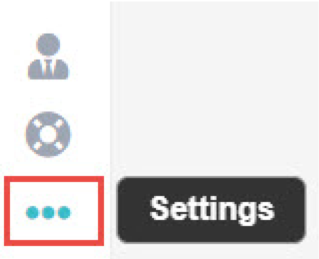
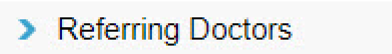
Referring Doctors

To access a list of the referring doctors you have added into Fydo simply follow the below steps:

1. Click on **Settings**

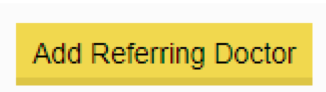


2. Then, **Referring Doctors**



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

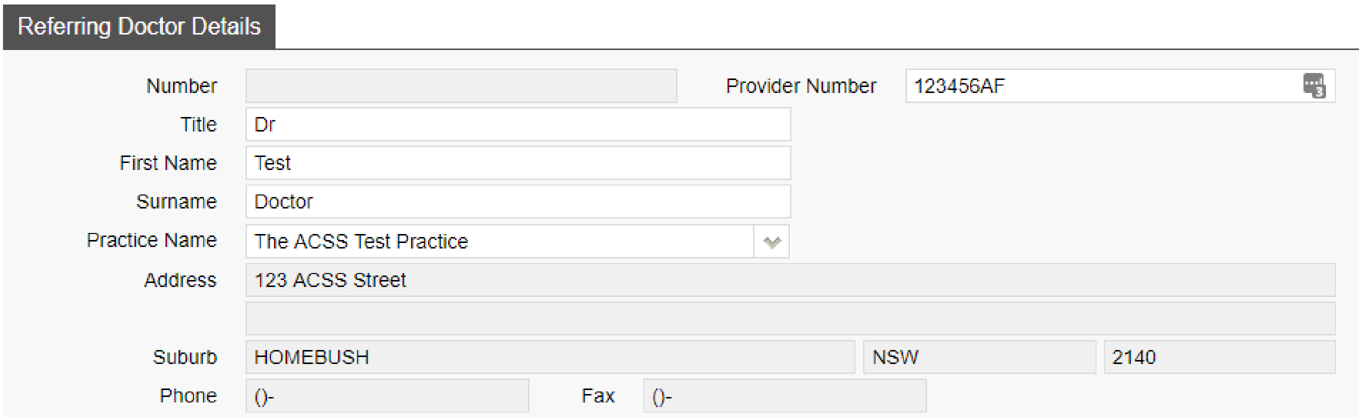
To **add** a referring doctor, click the yellow **Add Referring Doctor** button on the top right hand corner of your screen:

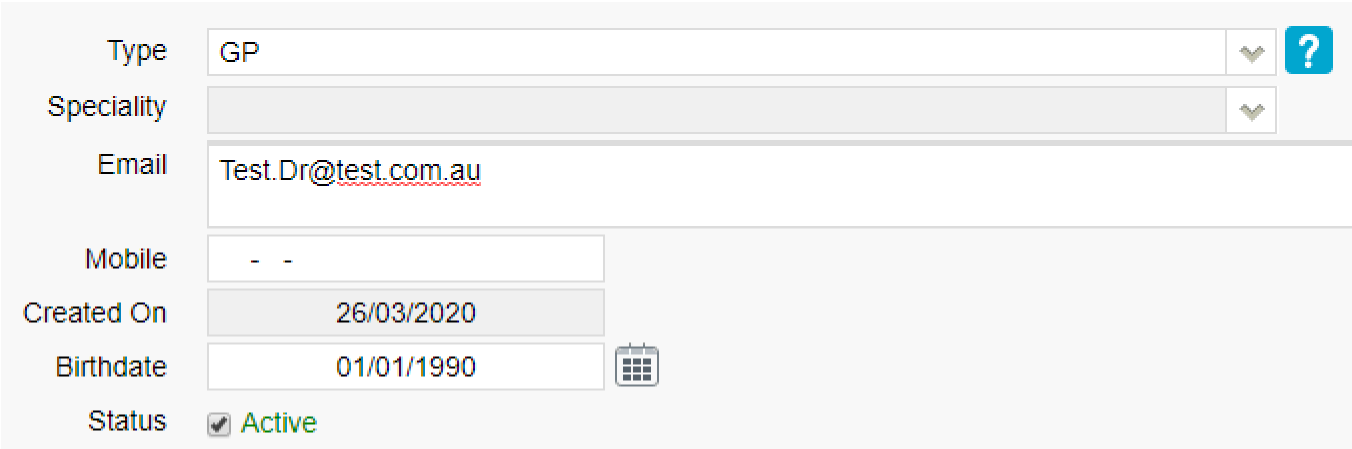


To **Edit** the details of an existing doctor, simply click **anywhere** along the row for that doctor, and you will be taken to the edit screen:

To get started editing, click on the **Edit** button on the top right hand corner of the page.

Whether you decided to **Add** a new Referring Doctor, or **Edit** an existing one, you will be met with the same screen:





Simply fill out, or change the fields as needed.

Remember, the required fields for a referring doctor are:

- **Provider Number – You can put a 0 if you do not have the number. Please note that you will need to enter it before submitting your claims, or you will run into rejections.**
- **First Name and Surname**
- **Type (GP or Specialist) – This affects the length of the referral, GP: 12 months, Specialist: 3 months.**
- **Speciality (If Specialist is selected)**

While there are a few other fields, they are optional.

Once you are happy with your changes, click the green **Save** button to lock them in.

You are also able to **Create** and **Edit** referrals from within the **Patient Details**, should you wish to do so, please see our [**Creating a Patient**] wiki page.

Eclipse Clinic Billing

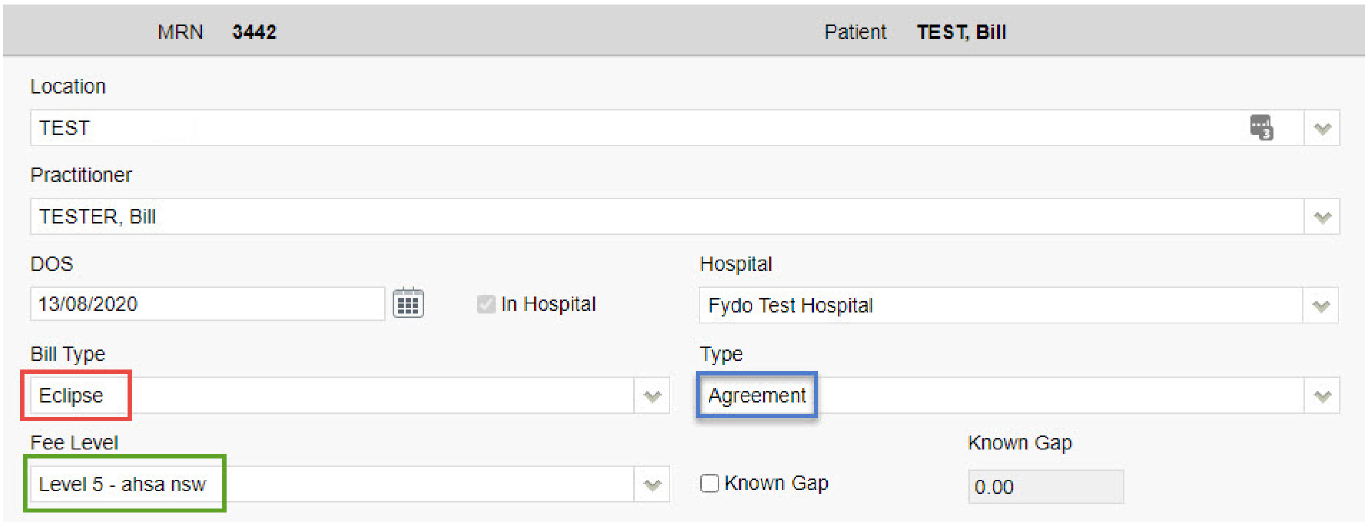
Set up your patient and ready to bill? Read ahead to find out how to submit claims to **Health Funds** via **Eclipse.**

Important Note: *If you have not submitted an* ***Online Patient Verification (OPV)*** *yet for your patient, or you do not know how, see our wiki page* ***here!***

To get started, from the **Patient Record**, we are going to click on the **Bill Patient** button.

You can also use the hotkey 'B'!

This will take you to the **Clinical Billing** page



While you may notice that there are more fields than shown above, for **Eclipse** we will only be focusing on a few.

Please note that most of these fields are drop down menus.

- **Location:** The Location the service took place. If you only have one it will be defaulted.
- **Practitioner:** The Practitioner who performed the service.
- **DOS:** The Date of Service.
- **In Hospital:** A tick-box to indicate if this service was performed in a Hospital, this is required for **Eclipse**

The main fields to ensure are correct for **Eclipse** are the highlighted ones above, and outlined below:

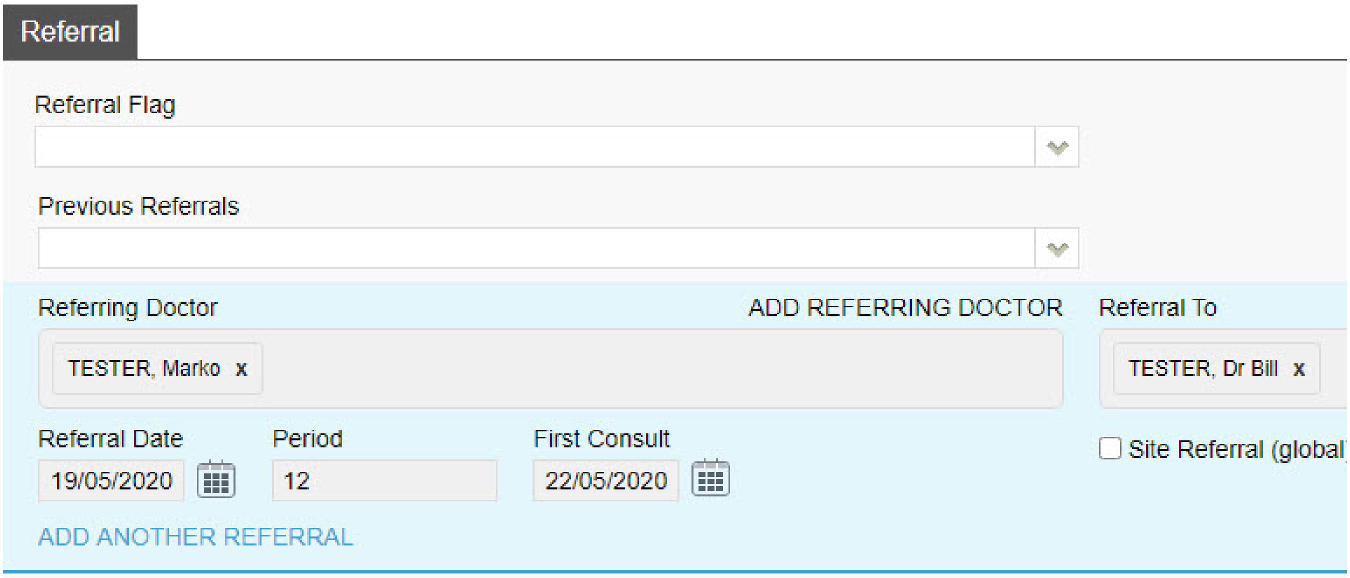
- **Bill Type:** The type of billing; be sure to select **Eclipse**

- **Fee Level:** Which fees this billing will use. Will default based on the patients record.
- **Type:** Needs to be set to either **Agreement** or **Scheme** depending on the fund.

The last step before we can begin our billing is to enter any needed referral information. If this does not apply to you, skip to the next section: **Adding Items**

Otherwise, simply fill out the **Referral** section as seen below. If you only have one referring doctor for this patient, they will be automatically selected here (provided it has not expired)

If you don't see a **Referral** you have added, be sure to check the **Previous Referrals** drop down menu!



Once you are done with the above segments, click on the green **Add Items** button in the bottom right hand corner of your screen.

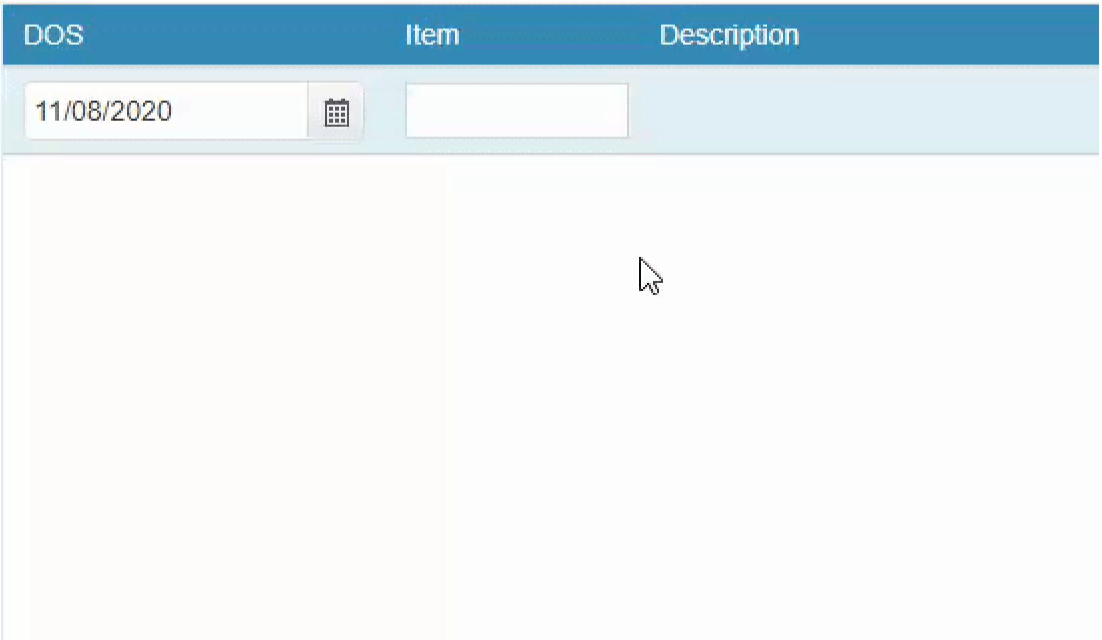
Clinic Billing

You will arrive at the **Clinic Billing** page. Here we can see a brief overview of previous information for the patient, and where we can bill an invoice.

Billing is as easy as typing in the item you need and selecting it. There are two different ways to search for the item as shown below:

- **Search for the item number itself.**
- **Search for a word in the description. This can either be at the start, or anywhere within the description!**

Don't forget, for **Eclipse** you can easily change the Date of Service within the invoice by using the handy calendar!



Once you have entered all your items as desired, click on the **Review Charges** button to proceed to the final page of billing.

Clinic Review Charges

You may notice that this page looks nearly identical to the previous **Clinic Billing** page. The only real difference is that you can no longer add or change items, and there are additional buttons at the bottom.

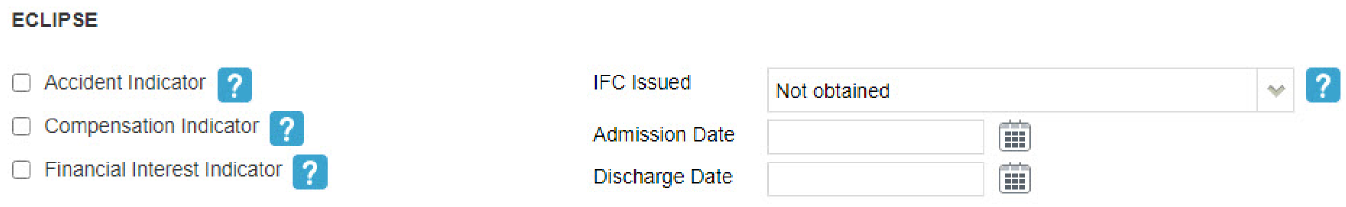
You will also be able to see the **Total Charges** for the items you have billed like so:

Total Charges	**$94.75**	**Total GST**	**$0.00**
Total Rebate	**$94.75**	Out of Pocket	**$0.00**

There are a few different options on this screen:

- **Edit Item And Charges:** Realised you have made a mistake? click this button to go back to the previous page and fix it up!
- **Cancel:** Cancel out of this billing, this will take you back to the **Patient Screen.**
- **Save:** Save this invoice, prompting the final confirmation before it is send to **Claiming – Medical**. If **Save & Print** is selected, it will also be printed.

Upon selecting one of the two save options, you will see the final stage of the billing, the **Claimant Screen.**



Please note that most of the fields are optional, so if you do not wish to fill them out, simply click on the green **Send Electronically** button.

Otherwise, you can fill them out accordingly, and select if an **IFC** was issued.

All done! A batch has now been created within **Claiming – Medical** and will be ready to send off.

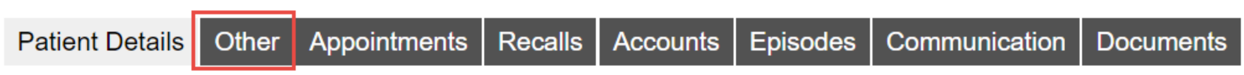
If you do not know how to send a batch, see our handy guide [here!]

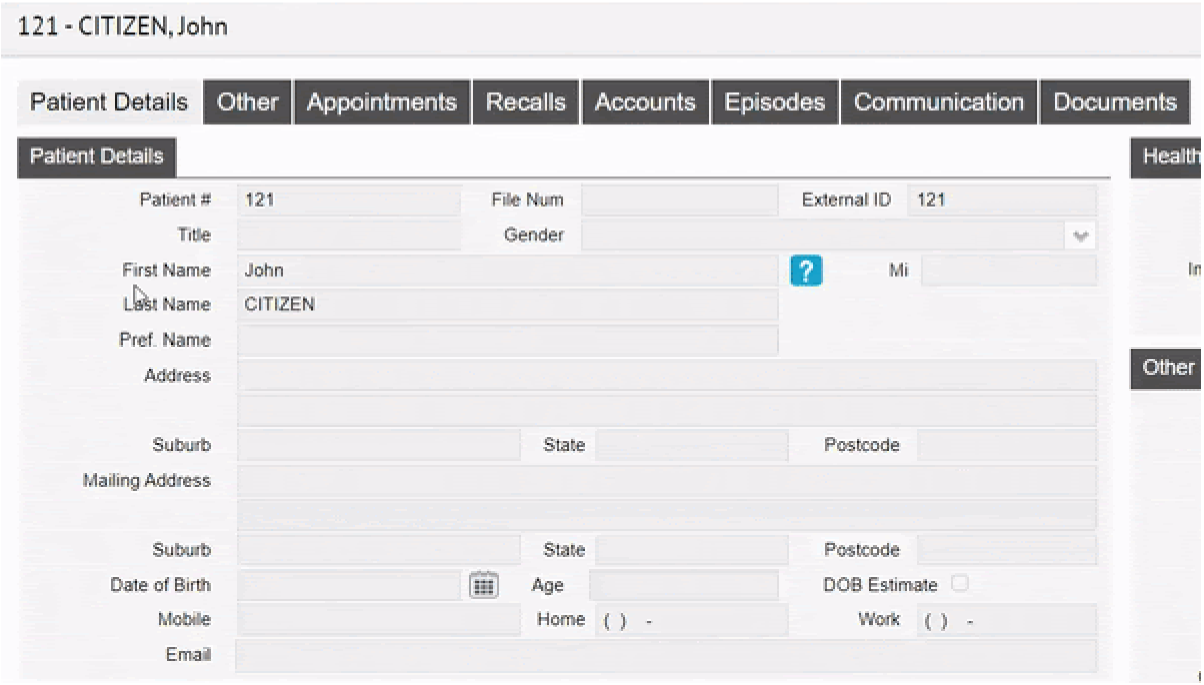
Billing DVA Community Nursing (Clinic)

So you're ready to bill DVA community nursing patients. Follow along to learn how.

It all starts with patients so click on the **Patients** tab and select a patient.

Next, before you bill, you will need to enter the dates for the 28 day cycle. Click on the **Other** tab on the patient's record and enter the **admission date** as well as the start date of the 28 day cycle.





Once finished, hit **Save**.

At this point, you are ready to bill.

However, it is a good idea to first run the **Online Patient Verification** to ensure the correct patient details are entered, as they are known to DVA.

To learn more about the Online Patient Verification, Click here

When you’re ready to bill, click on the **Bill Patient** button ***or hit ‘B’ on your keyboard*** as a shortcut!

While you may notice that there are more fields than shown above, for **Community Nursing**, we will only be focusing on a few.

Please note that most of these fields are drop down menus.

- **Location:** the location where the service took place. If you only have one, it will be defaulted
- **Practitioner:** the practitioner who performed the service. If you only have one, it will be defaulted
- **DOS:** date of service

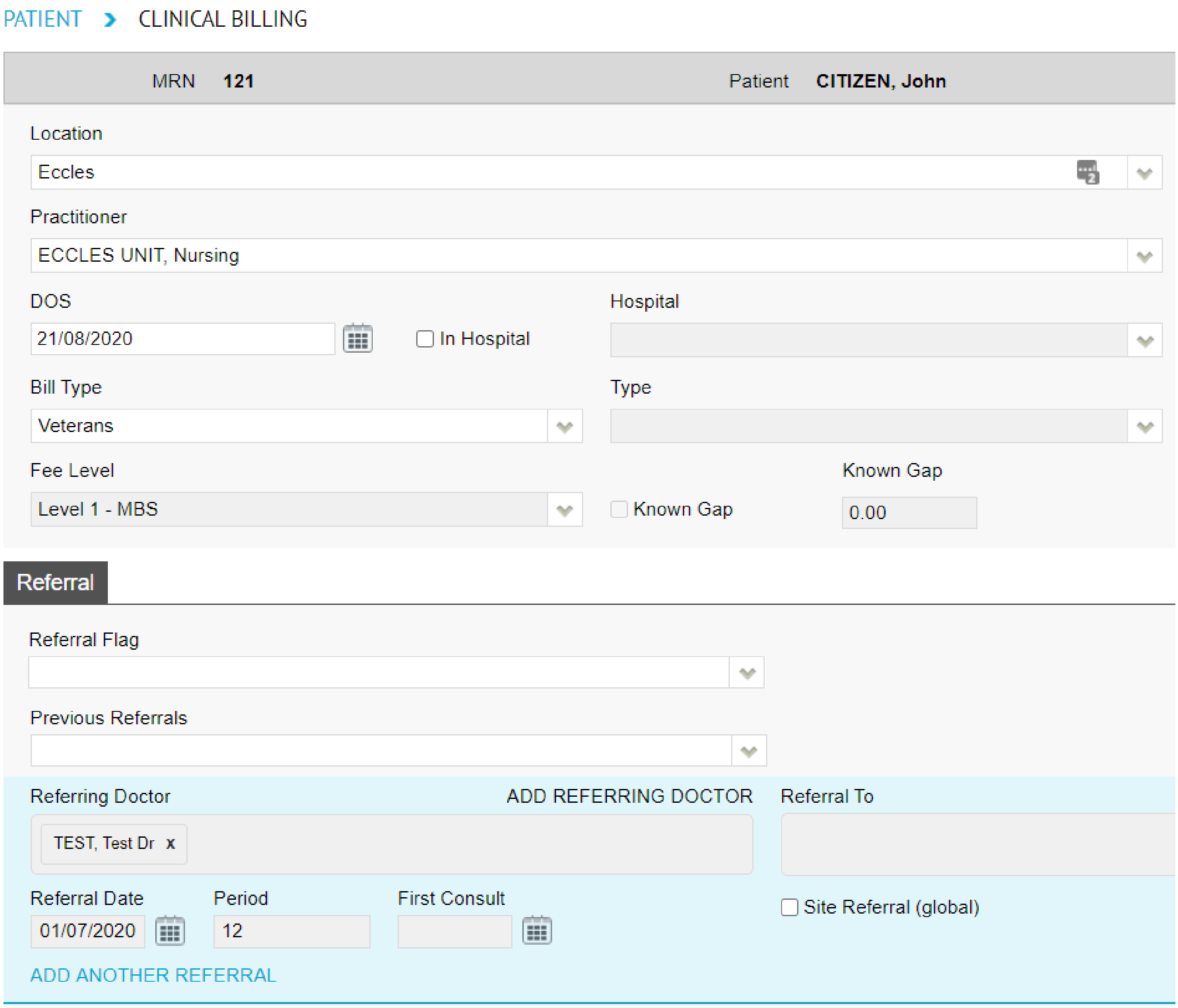
- **Referring Doctor**

Note: The **Bill Type** will automatically be selected as **Veterans**, given the patient has a veterans card number on their record.

Additionally, If you only have one location and practitioner setup in the system, these too will automatically be selected. This is usually the case for most community nursing organisations.

So, all you need to enter is the **Date of Service** (DOS). The date in this field will always be prefilled as *today's date*. Therefore, in almost all cases, you will need to change this date. The date of service should be the *first day* of the 28 day claiming cycle.

For more information on this, click here to read more on the DVA website



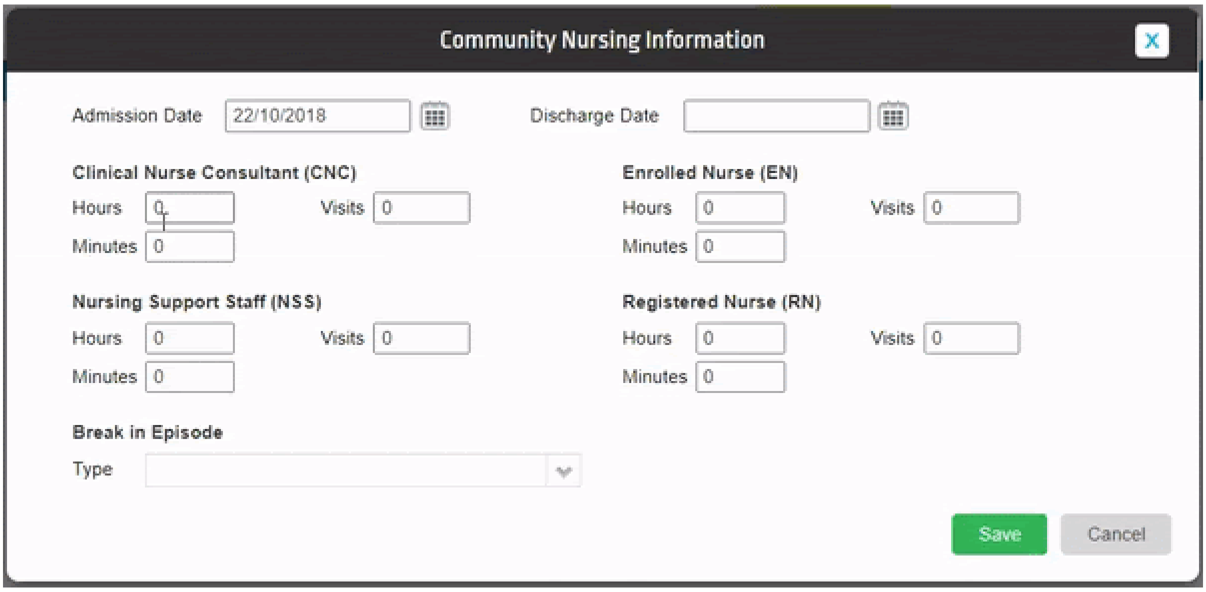
Conditional: if you have entered a referral on the patient's record and do not see it in the billing screen, you may click on the ‘**Previous Referrals**’ drop down to view all previous entered referrals and select the desired one.

Once you have filled in the above fields, click on the **Add Items** button. You’re nearly done!

You will now be presented with a pop up asking you to enter the nursing hours for this period of care (current 28 day cycle). Enter your nursing hours and hit ‘**Save**’.

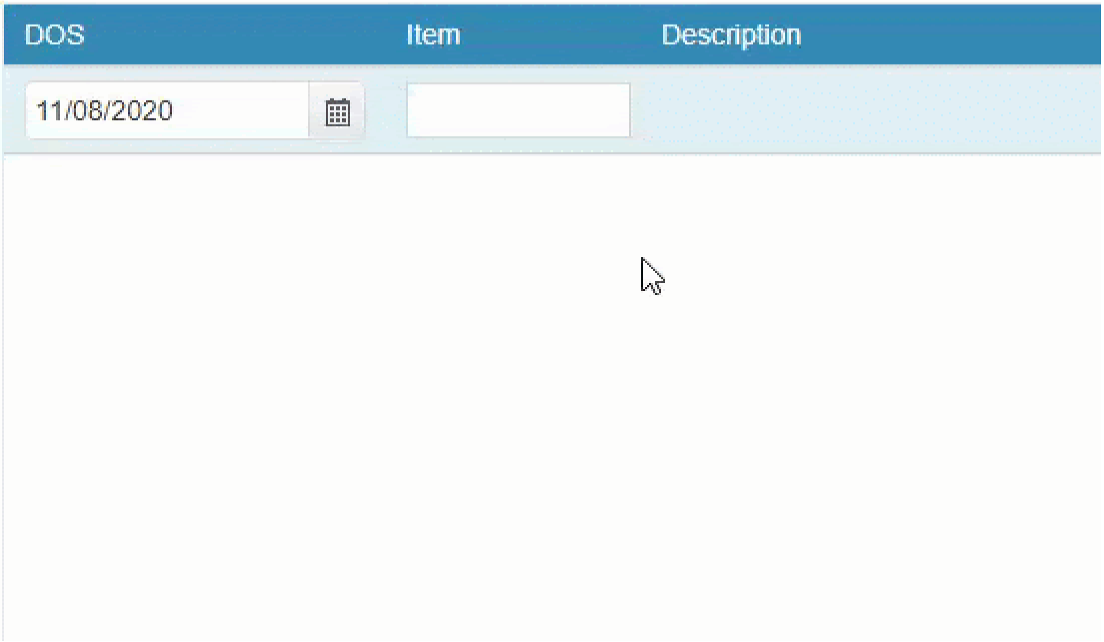
Note: hours are only required to be reported when *core items* are billed. They are not required if you are billing *consumables* only.

That said, if you are **not** billing your core items with the consumables, you will need to bill the core items *first*, before billing the consumables to avoid rejections.



Forgotten to add some hours, or want to check what you’ve entered? You can invoke the nursing hours pop up again by hitting the ‘**CN Info**’ button.

Next, go ahead and enter your desired item(s) in the below field:



Once you have entered all your desired items, click on:

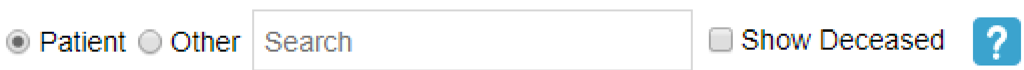
- **Review Charges**
- **Save**

All done! A batch has now been created within **Claiming – Medical** and will be ready to send off.

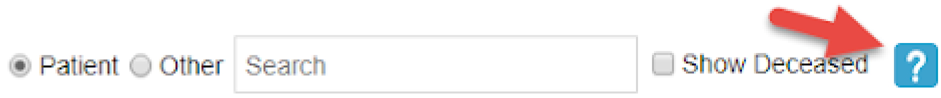
If you do not know how to send a batch, see our handy guide here!

Searching for a Patient

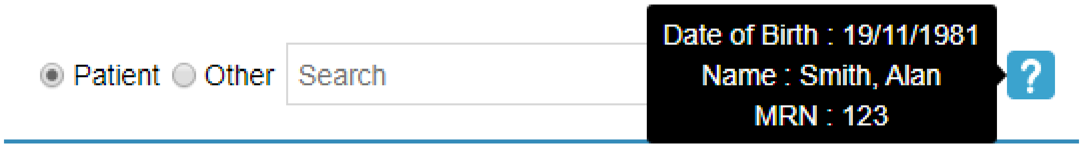
In Fydo, there are a few different ways we can search a patient.



Depending on if we have **Patient** or **Other** selected, there are different filters available. An easy way to see this, is to hover your mouse over the blue question mark.

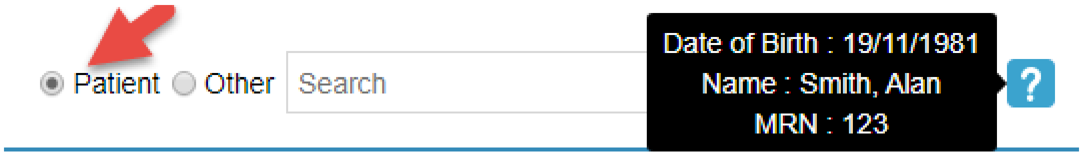


This will bring up a helpful menu like so:



Lets go over the two ways to search, and the filters associated with them.

Patient:



Date of Birth: Search by Date of Birth

Name: A search by **Last Name**,**First Name**

There are a few different ways to use this filter, here are some examples of how I can search for the patient Alan Smith.

- **Last Name Only:** Smith,
- **First Name Only:** ,Alan
- **Partial Search:** Sm,Al
- **Full Name:** Smith,Alan

While there are a few different ways to search for a patient, some searches will narrow the results greatly compared to others, try out a few to see what works best for you.

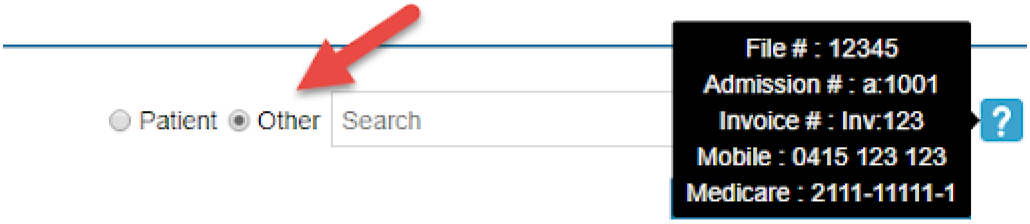
MRN: A search by the patient's **Medical Record Number**

Please note that you can search for a **partial** number. In the case of Alan Smith and his **MRN** of **123**; we can search a few different ways.

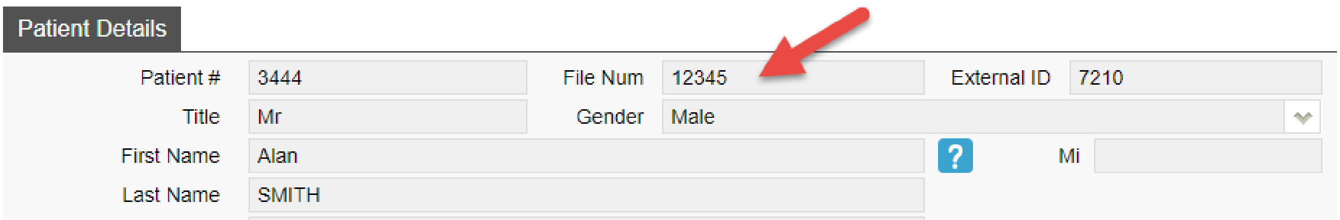
- **Full Number: 123**
- **Partial Number**: **23 or 12**

Searching for the full number will narrow your results down compared to a partial search.

Other:

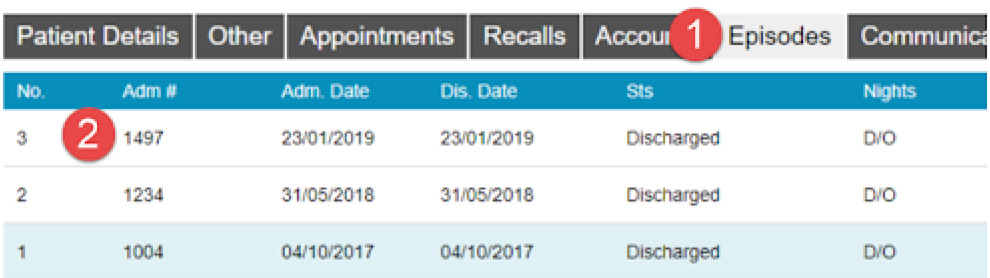


File #: The file number of the patient. Can be set in the **Patient Details.**

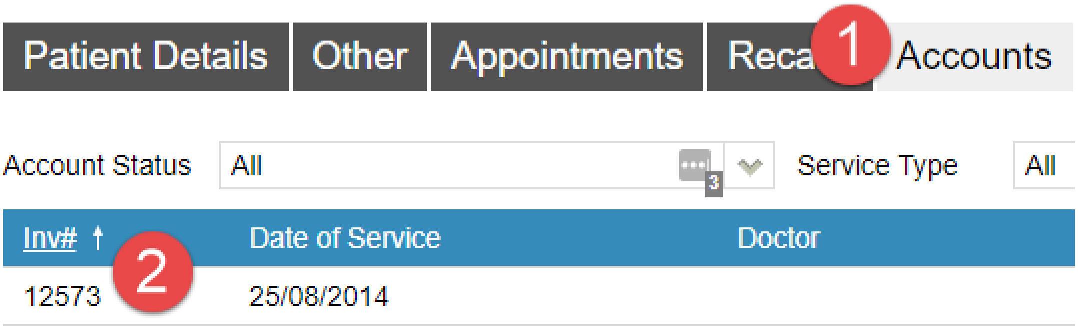


Admission #: Admission number for the patient (this is a number for patients that have Hospital episodes). Can be found in **Episodes,** from the **Patient Details** screen.

To search for the below **Admission,** I would have to search: **a:1497**



Invoice #: If the patient has been billed, you can search by an **Invoice Number**. This can be found in **Accounts**, from the **Patient Details** screen if you are a **Medical Practice**. For **Hospitals,** this can be found in **Episodes,** similar to the **Admission #**



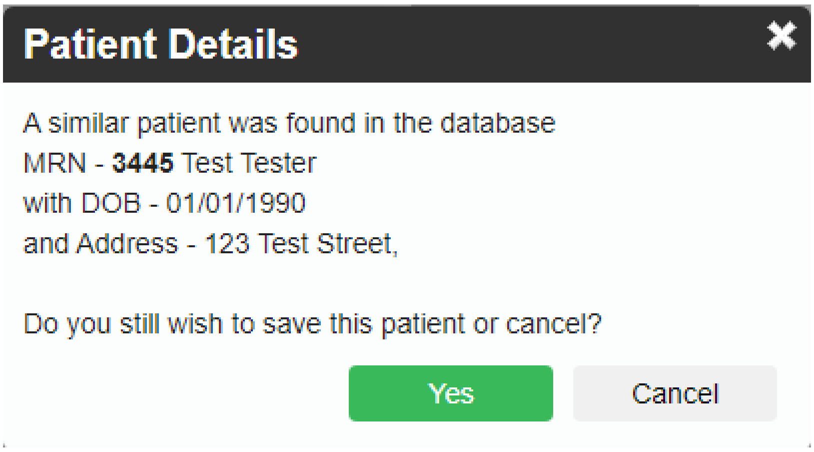
To search for the above **Invoice**, I would have to search: **Inv:12573**

Mobile: Mobile number of the patient.

Medicare: Medicare number of the patient.

[Merging Duplicate Patients]

When creating a patient, if the details are similar enough to a patient already in Fydo, you will receive the following message.



This message is Fydo taking measures to ensure you do not create duplicate patients. As you can see in this example, it is letting me know a similar patient was found. For Fydo to try to match existing patients, you will need to enter a minimum of:

- **First Name and Last Name**
- **Date of Birth**

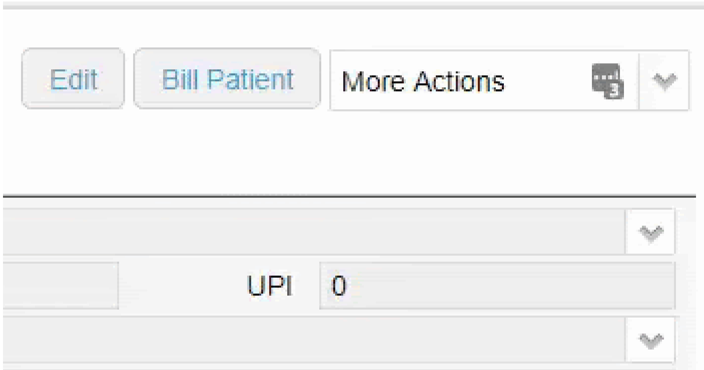
If you enter just the first and last name, it will not try to find similar patients, you do need to enter the date of birth for the check to occur.

Despite this, you may realise at some point that you have a duplicate patient. If you run into this issue, read ahead to find out how to **merge** the patients together.

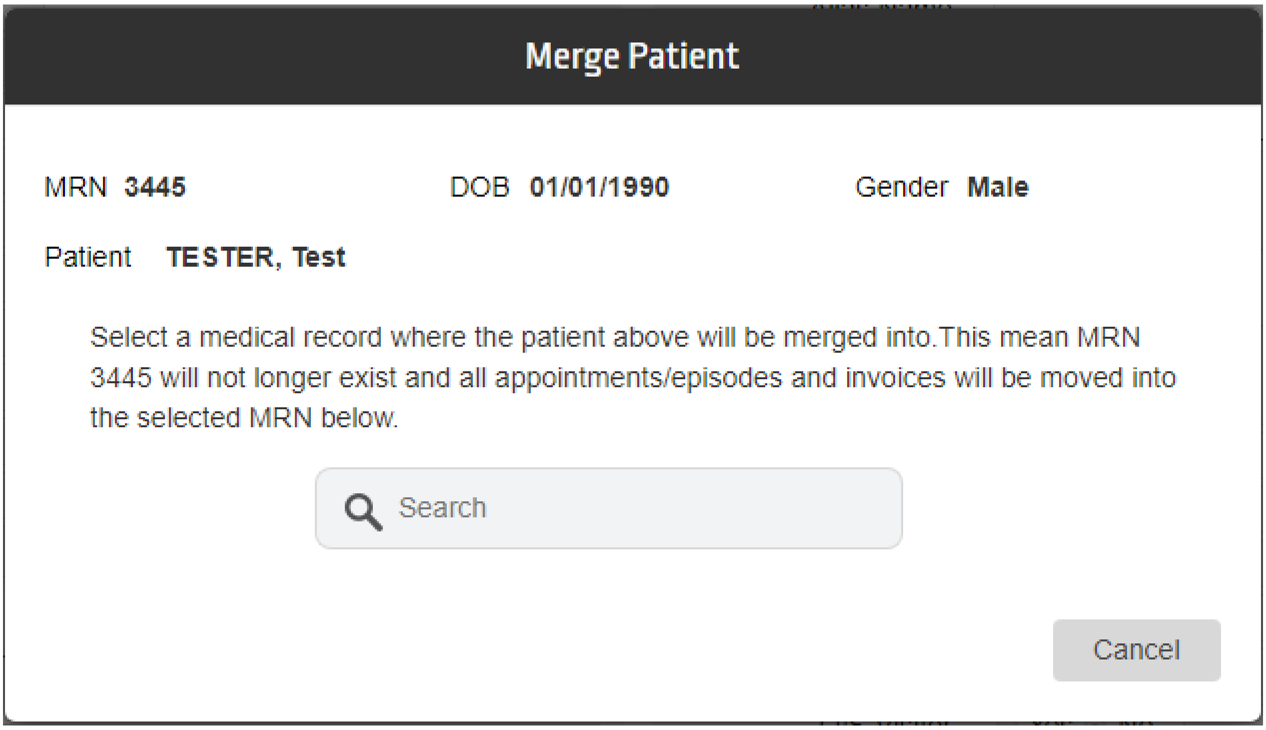
How to Merge Patients

First search the patient/MRN that will become obsolete, after this process, & open their Patient Info Screen.

In the top right hand corner of the **Patient Details** screen you will see a drop down menu called **More Actions**.

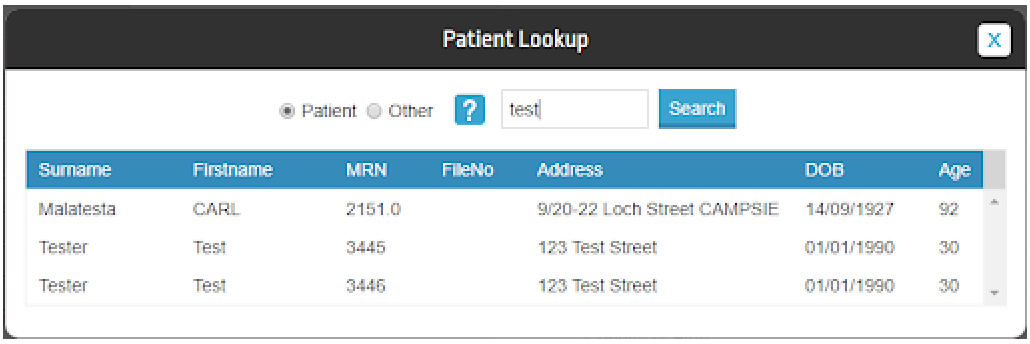


You will now see a screen with the patient's details and a search bar.



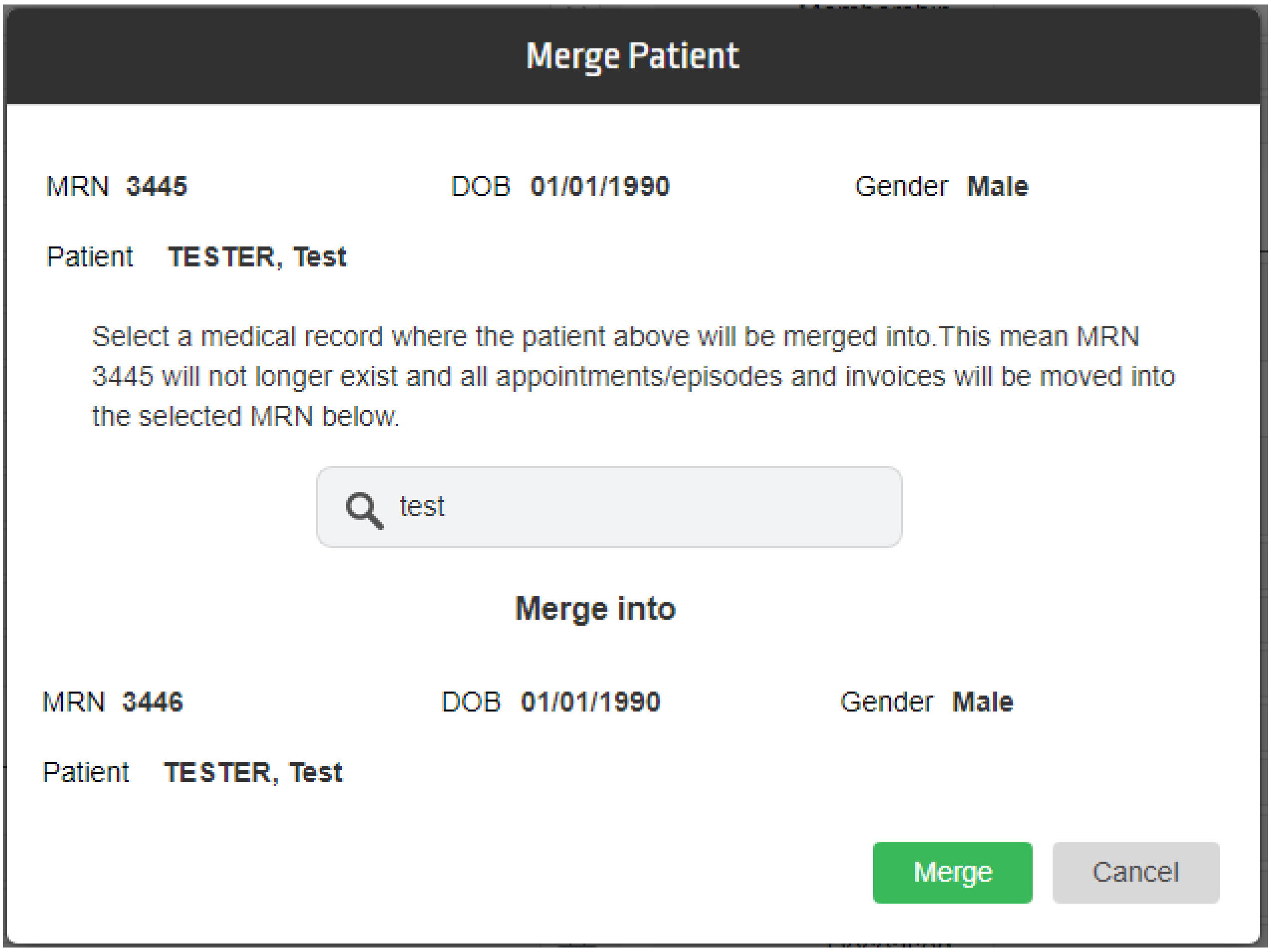
Simply search for the patient you wish to merge the current one with. You will see the **Patient**

Lookup box, containing any patients found.



The **Patient Lookup** menu also has all the regular ways to search for a patient.

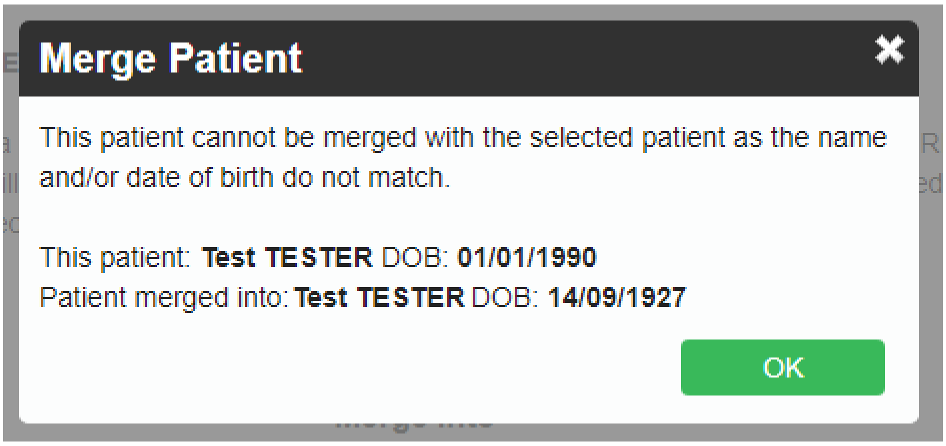
Select the patient you wish to merge the current one with and you will now see the previous **Merge Patient** screen with additional details of the patients to be merged



Ensure the patients being merged are correct, as this process cannot be undone if an error is made.

Now click the green **Merge** button, and you are all done! The patients have now been merged.

Should you try to **merge** two patients with **differing** details, Fydo will stop you with the following error message.

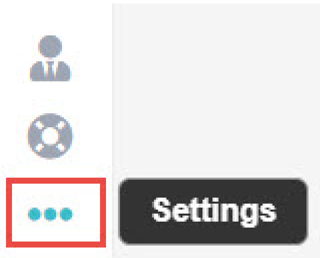


As you can see, the patients here have differing **Date of Births**, so Fydo will not let me merge them.

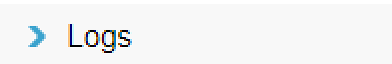
The Audit Log

The **Audit Log**, is a log Fydo stores to keep track of which user has performed which action. In the case of merging, we will be able to see which user has performed the merge, as well as the details of said merge.

To access the **Audit Log,** first select **Settings**



Then **Logs** from the menu



You will now see the **Audit Log:**

Username	Message	Date Created
Michelle Romero	Login – Michelle Romero	08/05/2020 1:34:44 PM
Michelle Romero	Patient Merge - Test TESTER - MRN: 3445 merged into MRN: 3446. MRN: 3445 will no longer exist.	07/05/2020 4:23:30 PM
Michelle Romero	Login – Michelle Romero	07/05/2020 1:25:55 PM

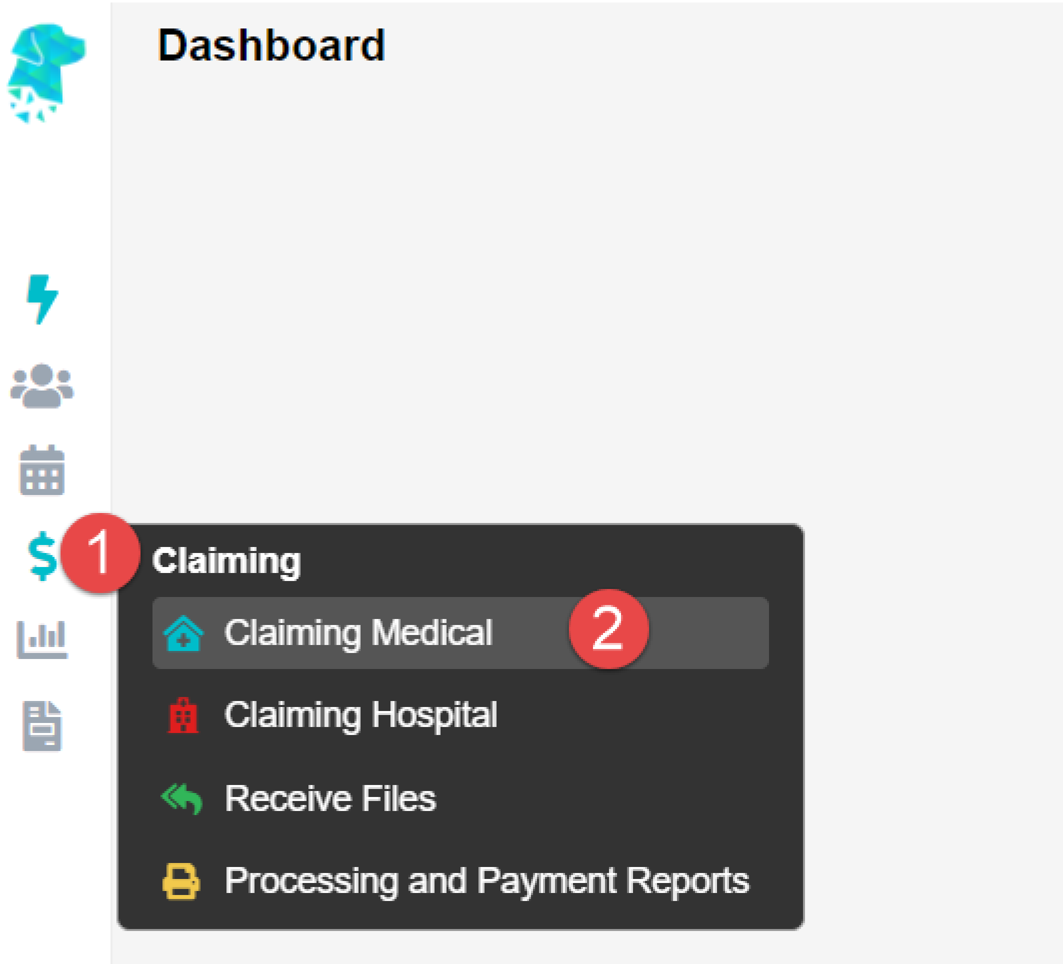
This screen shows us some important information such as:

- **Username: The user who performed the action**
- **Message: What happened, in the above case we have some logins and the patient that was merged.**
- **Date created: The date this action happened, as well as the time.**

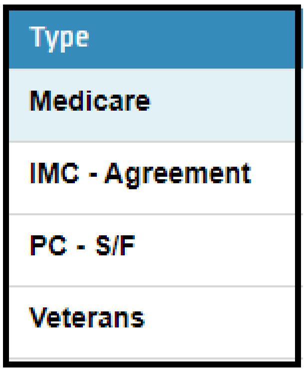
If you ever need to confirm what has happened in Fydo, the Audit Log is the perfect place to check.

Sending Batches - Claiming Medical

All done billing? Great! The next step is to send these batches off. To get started head to **Claiming**, then select **Claiming Medical.**



There are a few different **Types** that a batch can have, depending on what has been billed.

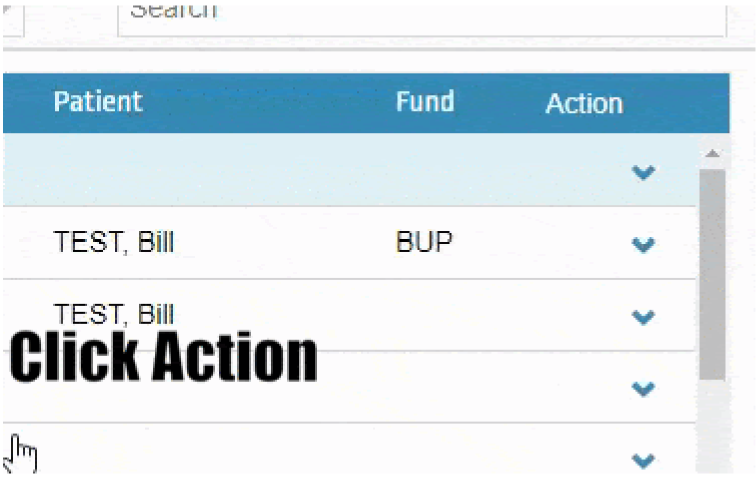


- **Medicare**
- **Veterans**
- **IMC (Inpatient Medical Claims) – Scheme or Agreement**
- **PC (Patient Claims) – Store and Forward or Real Time**

No matter the type of batch, they all follow the same simple process to be sent off.

Actions Menu

Before we get started on sending the batch, here is a handy guide to accessing the options for a batch. This will be used at all stages of the batches life cycle, from **Open** to **Payment Received.**



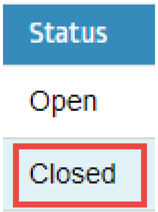
As shown above, there are two ways to access this menu:

1. Left click on the downward arrow in the **Action** column.
2. Right click **anywhere** on the batch line itself.

Both of these methods will display the same menu.

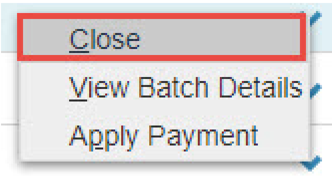
Sending a Batch

To send a batch; first the batch must have the status of **Closed**, this can be seen in the **Status** column**.**

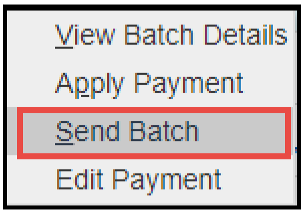


In the case of a **Medicare** or **Veterans** batch, the status may be **Open.** An **Open** batch means that if you bill any more invoices of the same type, they will be added to this batch.
A **Medicare** or **Veterans** batch can hold up to 80 invoices before it will automatically **Close.**

In a case like this, you will have to access the **Actions Menu** as seen above, and select **Close.**



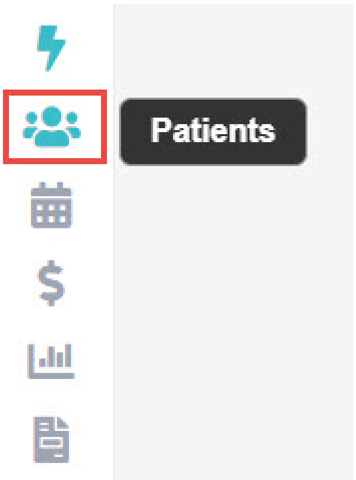
Once a batch is **Closed**, simply access the **Actions Menu** once more and select **Send Batch**.

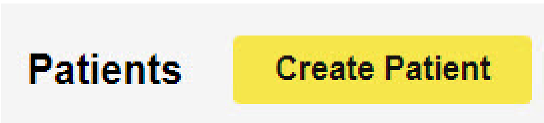


All done! You will notice the status of your batch will first change to **Queued** as it is getting ready to go. Then it will become **Sent** should you refresh the page or come back to it a bit later.

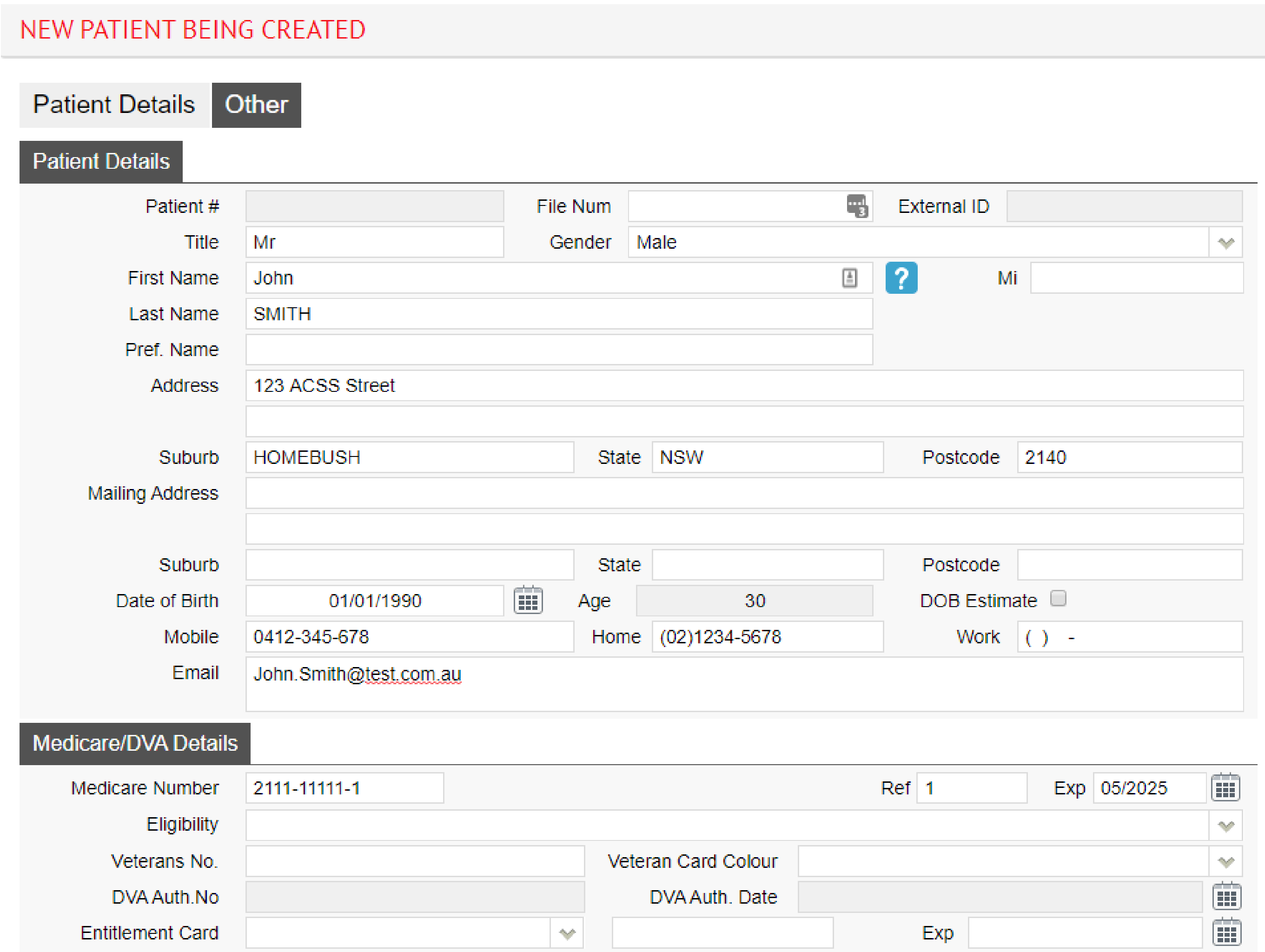
How to Create a Patient

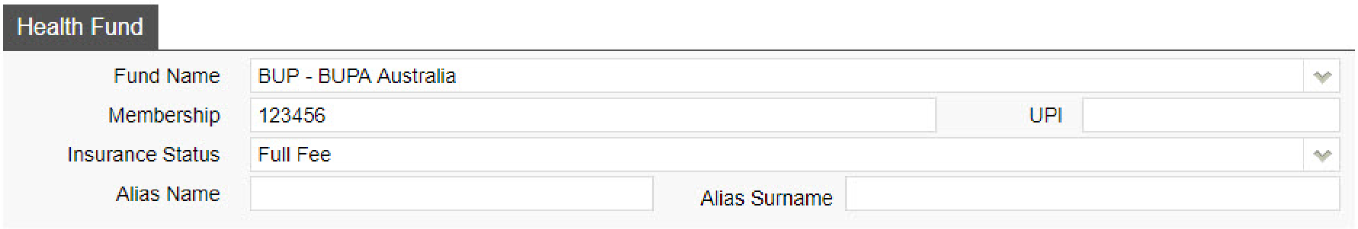
To get started, head to the **Patient** menu, and click **'Create Patient'**





You will see the **Patient Details** screen, here we can enter relevant information such as: **Name**, **Gender**, **Date of Birth**, **Address**, **Contact details**, **Medicare/DVA Numbers** and **Health Fund Membership**.



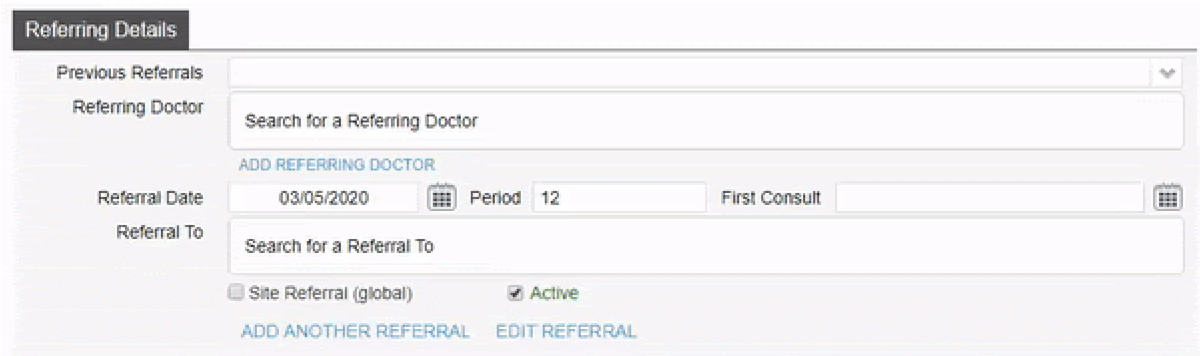


Referring Details

The **Referring Details** section gives us a few options.

1. Select a previous referral for this patient.
2. Search for an existing doctor in Fydo to use.
3. Create a new doctor.

Begin by searching for the doctor, either by **Name** or by **Provider Number.**



Select the doctor you need as the referral, then the date of the referral, and you are all set!

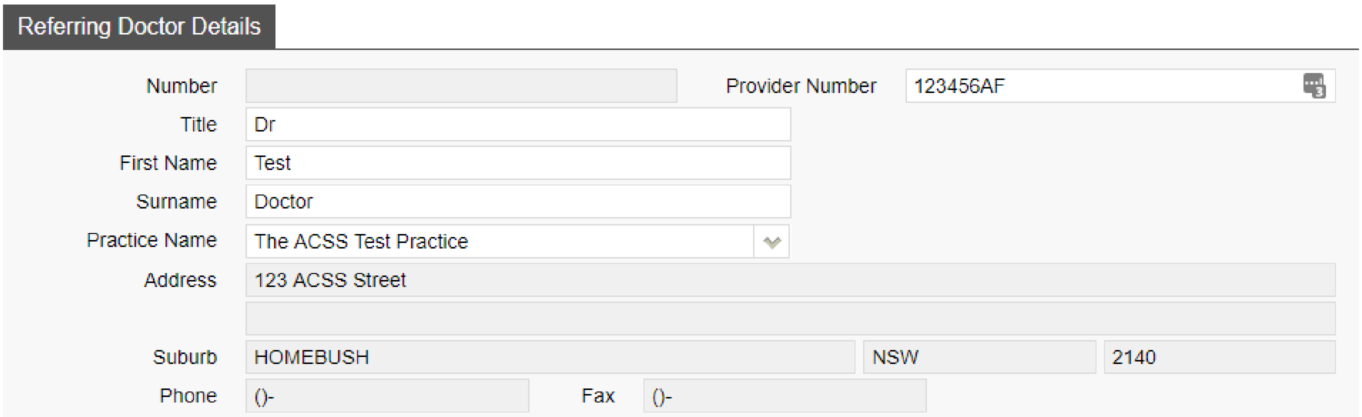
Don't have the referring doctor in your system? Read below to see how to add them.

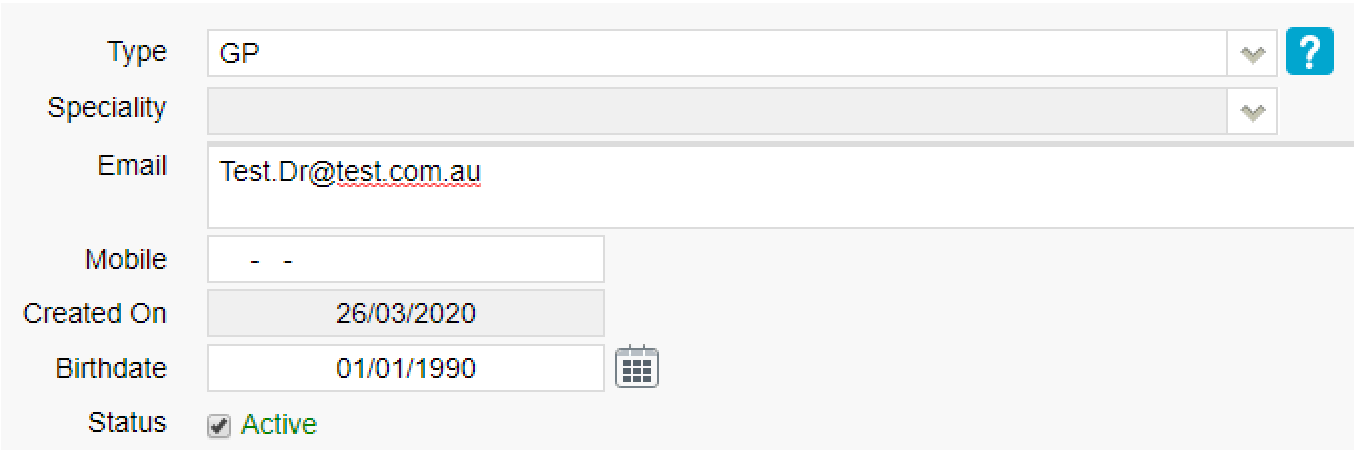
Adding a Referring Doctor

Click on the '**Add Referring Doctor'** button to be taken to the doctor creation page.

Here we can enter any relevant details for the doctor. Things such as their:

- **Provider Number**
- **Name**
- **Practice Name (Optional)**
- **Speciality**
- **Contact Details (Optional)**





When you are done, click the green **Save** button.

When you are done creating your patient, again click the green **Save** button.

All done! We have created our first patient.

*To understand the importance of an **Online Patient Verification**, and how to do one yourself:* ***Click Here***

Clinic Bulk Billing

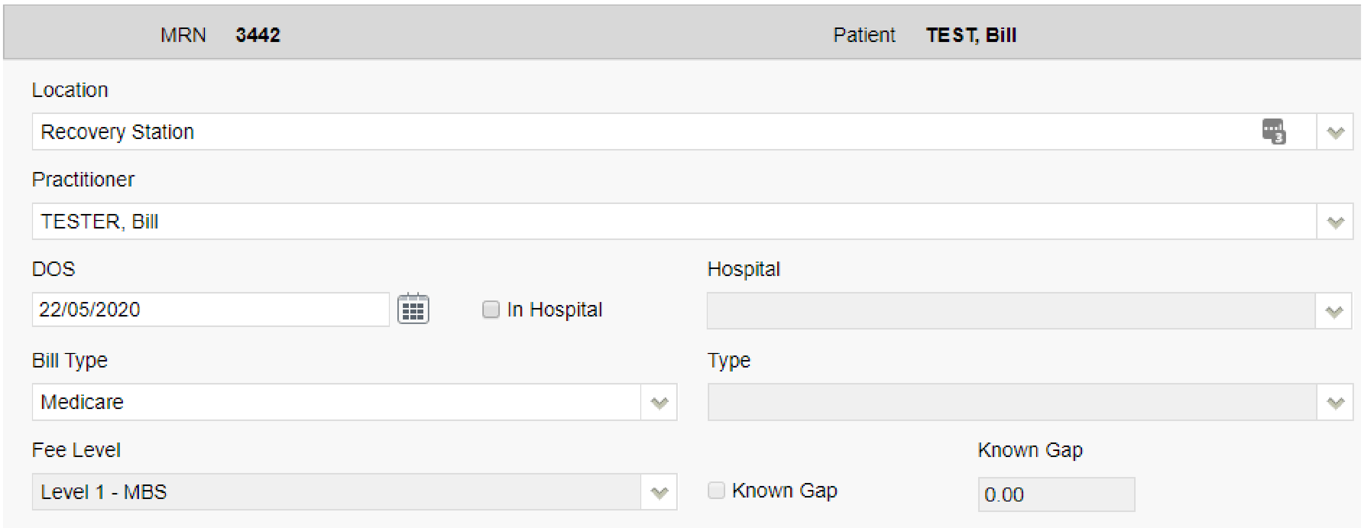
Set up your patient and ready to bill? Read ahead to find out how to submit claims to **Medicare** via **Bulk Billing.**

Important Note: *If you have not submitted an* ***Online Patient Verification (OPV)*** *yet for your patient, or you do not know how, see our wiki page* ***here!***

To get started, from the **Patient Record**, we are going to click on the **Bill Patient** button.

You can also use the hotkey 'B'! 

This will take you to the **Clinical Billing** page



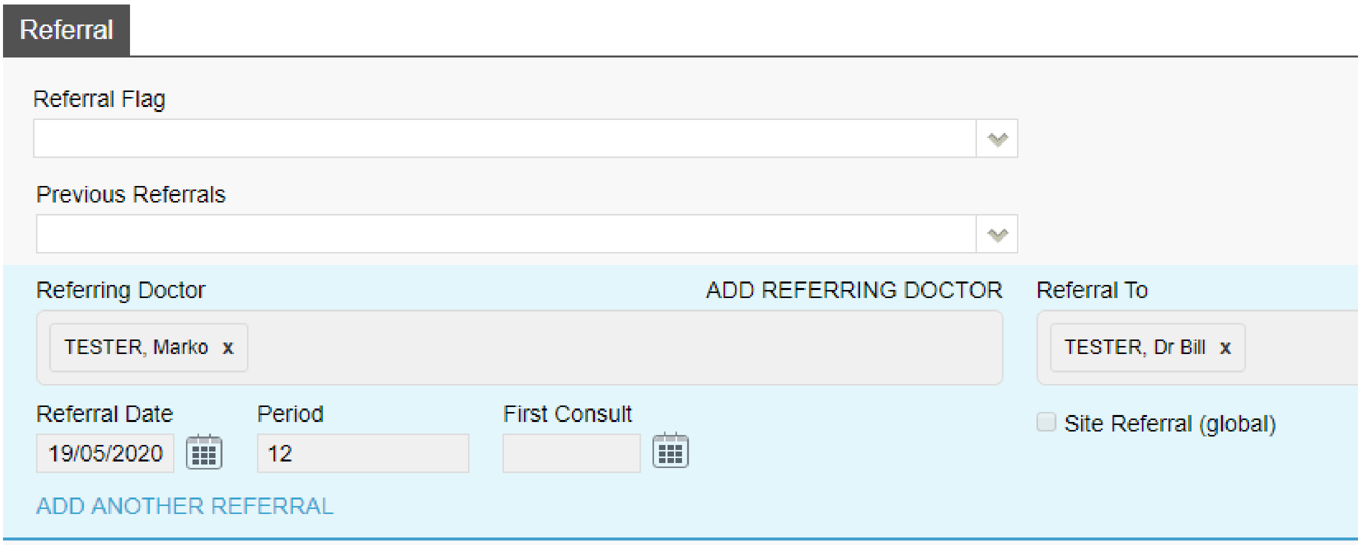
While you notice that there are more fields than shown above, for **Bulk Billing** we will only be focusing on a few.

Please note that most of these fields are drop down menus.

- **Location:** The Location the service took place. If you only have one it will be defaulted.
- **Practitioner:** The Practitioner who performed the service.
- **DOS:** The Date of Service.
- **In Hospital:** A tick-box to indicate if this service was performed in a Hospital. If you select this the **Hospital** drop down menu becomes active, allowing you to select the Hospital.

The last step before we can begin our billing is to enter any needed referral information. If this does not apply to you, skip to the next section: **Adding Items**

Otherwise, simply fill out the **Referral** section as seen below. If you only have one referring doctor for this patient, they will be automatically selected here (provided it has not expired)



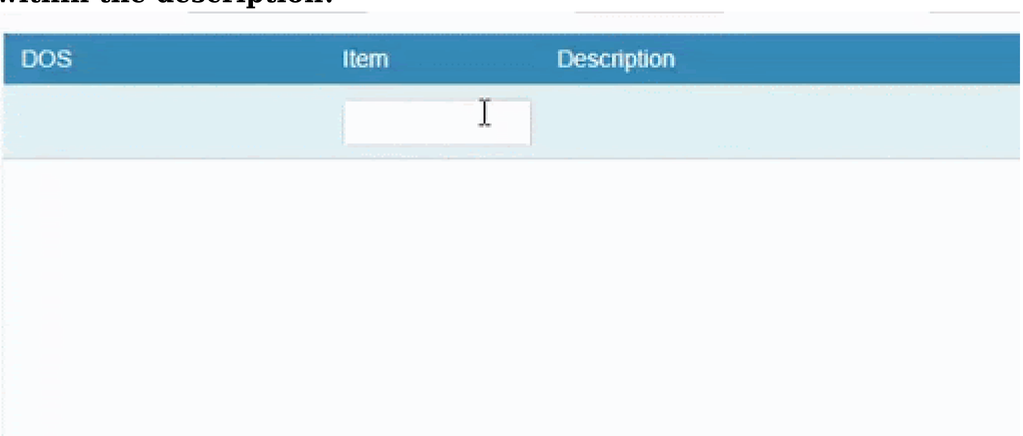
Once you are done with the above segments, click on the green **Add Items** button in the bottom right hand corner of your screen. 

Clinic Billing

You will arrive at the **Clinic Billing** page. Here we can see a brief overview of previous information for the patient, and where we can bill an invoice.

Billing is as easy as typing in the item you need and selecting it. There are two different ways to search for the item as shown below:

- **Search for the item number itself.**
- **Search for a word in the description. This can either be at the start, or anywhere within the description!**



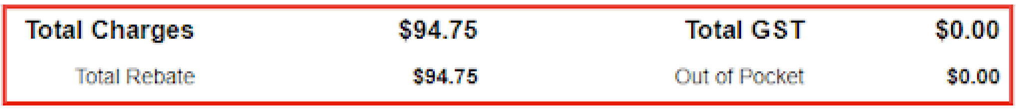
*Remember for **Bulk Billing** the **Date of Service (DOS)** cannot be changed in an invoice.*

Once you have entered all your items as desired, click on the **Review Charges** button to proceed to the final page of billing.

Clinic Review Charges

You may notice that this page looks nearly identical to the previous **Clinic Billing** page. The only real difference is that you can no longer add or change items, and there are additional buttons at the bottom.

You will also be able to see the **Total Charges** for the items you have billed like so:



There are a few different options on this screen:

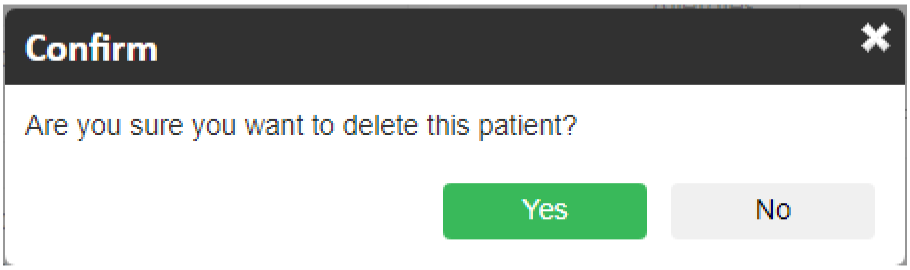
- **Edit Item And Charges:** Realised you have made a mistake? click this button to go back to the previous page and fix it up!
- **Cancel:** Cancel out of this billing, this will take you back to the **Patient Screen.**
- **Save:** Save this invoice, send it to the **Claiming Medical** section, ready to send. If **Save & Print** is selected, it will also be printed.

All done! The invoice has now been saved within a **Batch** and is now ready to be sent.

Deleting a Patient

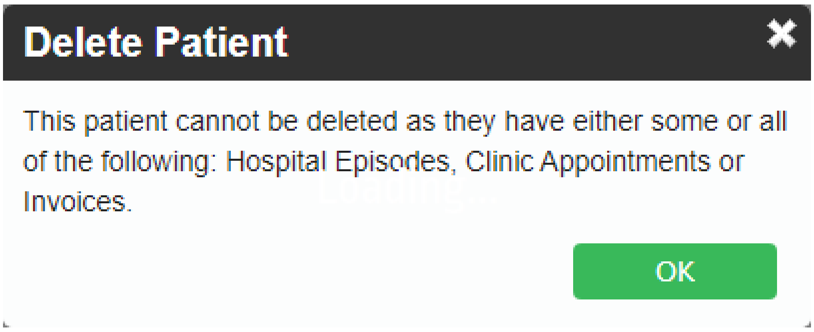
From the **Patient Details,** select the more actions drop down, then **Delete Patient**

You will see the confirmation box. If you wish to proceed, click **Yes**



Done! The patient has now been deleted.

You might also run into the following message when trying to delete a patient:



As the message states the patient may have one or more things stopping the deletion; things such as:

- **Outstanding Hospital Episodes**
- **Appointments**
- **Outstanding Invoices**

If you wish to delete this patient, you will have to resolve any of the above issues first.

The Audit Log

The **Audit Log**, is a log that Fydo stores to keep track of which user has performed which action. In the case of a patient being deleted, we will be able to see which user has deleted the patient, as well as the patient's details.

To access the **Audit Log,** first select **Settings** then **Logs**

This will take us to the **Audit Log.**

Here we will be able to see what has happened within **Fydo.**

Username	Message	Date Created
Michelle Romero	Patient Delete - Test TESTER - MRN: 3446 has been deleted	11/05/2020 3:09:07 PM

In the above example, we can see the log on a patient that was deleted. This log shows us key information such as:

- **Username:** The User who performed the action
- **Message:** What happened, above we can see the patient was deleted; it displays the patients name and MRN
- **Date created:** The date this action happened, including the time

If you ever need to confirm what has happened in Fydo, the **Audit Log** is the perfect place to check.

Online Patient Verification – OPV

An Online Patient Verification (**OPV**) is a check you should perform before billing a patient, to avoid potential rejections. This function will check the details you have entered against the records Medicare, DVA or a Health Fund have on their system.

Please Note: *A passing OPV does not mean the claim will be paid. It merely means the patient has, or had a membership at the date of the OPV.*

How to perform an OPV

FYDO will automatically run an OPV check, if all the correct information is entered, when an appointment is saved. However the OPV can also be done manually if required.

First, head to the **Patient Details**. At the bottom of the record you will see the **Eligibility Screen** as shown below.

Please Note: *If the Last Medicare and Health Fund Check fields have a red date, this means the last check was more than 3 months ago. If they have a green date, it was done in the past 3 months.*

Simply select the following:

1. Type: There are a few different types of verifications that can be performed, depending on what is needed. The image below outlines those options:

2. Date: The date of an OPV is quite important, by default it begins at the current date. It is possible a patient may fail an OPV at the current date, but at the Date of Service, they were passing. This could be the case if a patient is deceased, or has since changed their membership.

Now simply click the green **Check** button, and you have started the verification.

Alternatively, you may also use a shortcut on your keyboard: ***V***

Outcomes of an Online Patient Verification

There are three main outcomes of an OPV.

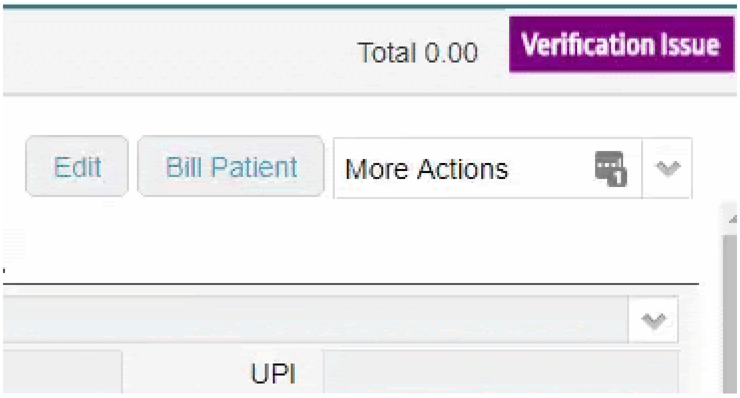
1. Successful

If the OPV is successful, you will see the fields that were validated highlighted in green, like so.

2. Successful with a Verification Issue

You may perform an OPV, and the fields you verified are outlined in green, however you may notice a blinking purple button signifying a Verification Issue!

If you notice this button, Fydo has run into an issue during the verification. Simply hover your mouse over it to see the results.



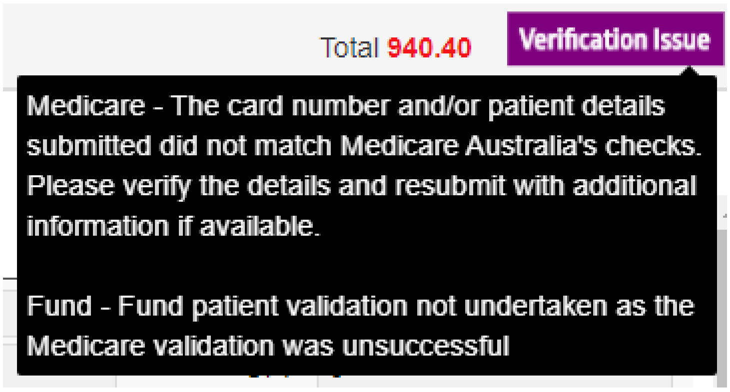
An issue like this means that the data Fydo has submitted to medicare was close enough to the correct details, that Medicare has gone ahead and provided us with the correct information.

We recommend running the OPV again, to confirm if it will pass without issue.

3. Failing an OPV

As above, you may again notice the blinking Verification Issue button.

However, this message is different:



This usually occurs when the details you have do not match what Medicare or the Health Fund have on record. You should double check the details you have, and possibly follow up with the patient.