

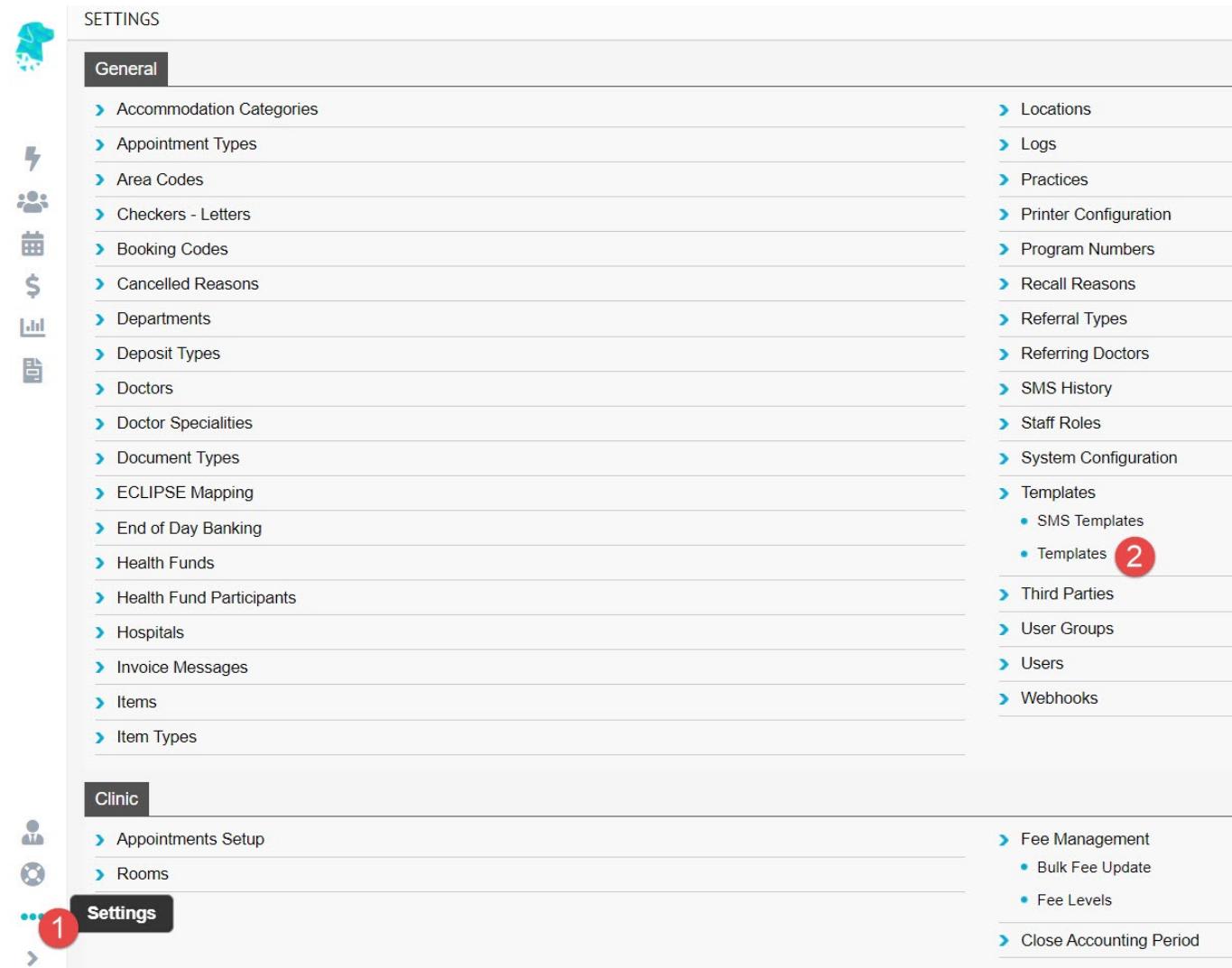
Uploading a Clinic Invoice Template

While you can create your own invoice templates from scratch in Microsoft Word, you may also contact FYDO support and request an invoice template be uploaded to your FYDO account, for you.

This template will allow you to print invoices right away. You may further customise this template as desired, should you choose to.

Uploading / editing clinic invoice templates

To upload or edit existing templates, you will need to go to **Settings > Templates**.



The screenshot shows the 'SETTINGS' menu in the FYDO software. The 'General' section is currently selected. On the left, there is a sidebar with icons for various settings categories: Accommodation Categories, Appointment Types, Area Codes, Checkers - Letters, Booking Codes, Cancelled Reasons, Departments, Deposit Types, Doctors, Doctor Specialities, Document Types, ECLIPSE Mapping, End of Day Banking, Health Funds, Health Fund Participants, Hospitals, Invoice Messages, Items, and Item Types. The 'Templates' section is located in the middle-right of the screen, under the 'General' heading. It contains a list of items: Locations, Logs, Practices, Printer Configuration, Program Numbers, Recall Reasons, Referral Types, Referring Doctors, SMS History, Staff Roles, System Configuration, Templates (with sub-items for SMS Templates and Templates), Third Parties, User Groups, Users, and Webhooks. A red circle with the number '2' is placed over the 'Templates' section. At the bottom of the screen, there is a navigation bar with icons for Clinic, Appointments Setup, Rooms, and Settings. The 'Settings' icon is highlighted with a red circle containing the number '1'.

This will reveal the templates currently in your FYDO account.

Note: an invoice template is necessary for each *type* of invoice; such as Medicare, DVA, and Private.

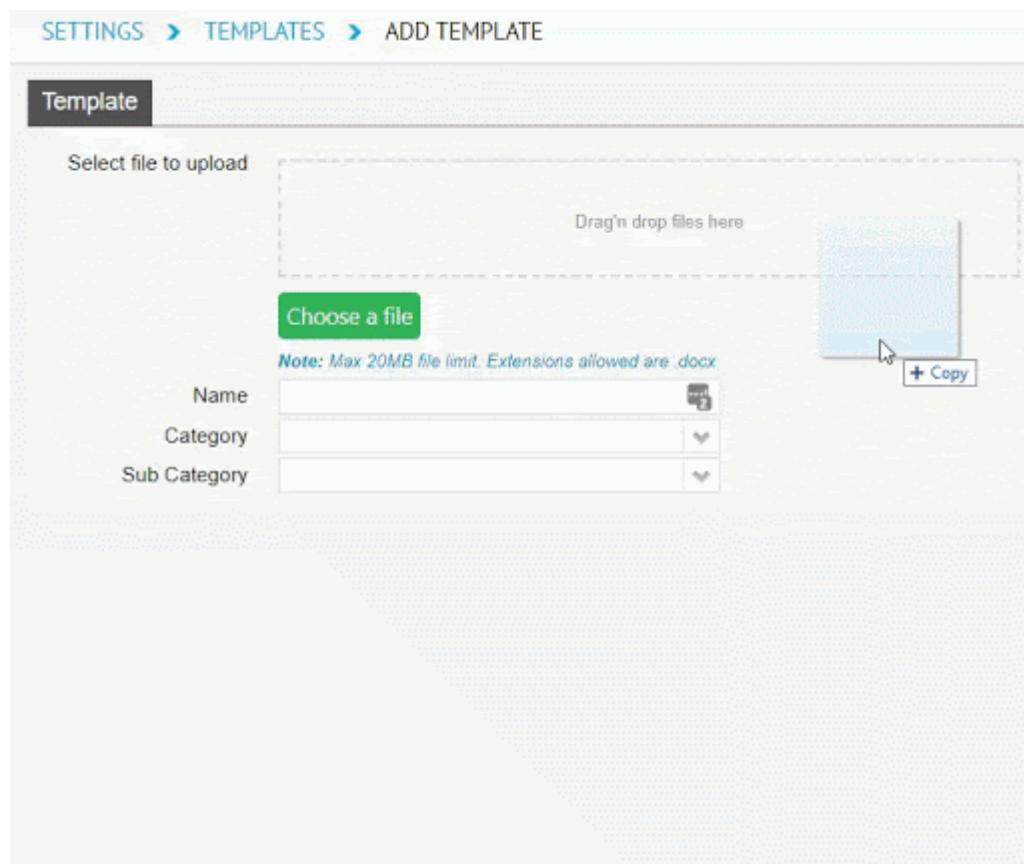
Adding a new template

So you may upload a template by clicking on the **Add Template button** to the top right corner of the screen.



Then, you will need to browse your computer for the template file or simply drag it in, as shown below.

Give it a **Name**, select a **Category** (invoices in this case) and a **Sub Category** (whether it is DVA, Medicare, Private, etc.).



The screenshot shows a web-based form for adding a new template. The top navigation bar includes "SETTINGS > TEMPLATES > ADD TEMPLATE". The main section is titled "Template". It features a "Select file to upload" area with a "Choose a file" button and a "Note: Max 20MB file limit. Extensions allowed are .docx" note. Below this are three dropdown menus for "Name", "Category", and "Sub Category". A "Copy" button is located in the bottom right corner of the upload area. The entire form is set against a light blue background with a dotted pattern.

Once you have entered the above details, hit the green **Save** button and you are all done!



You may also mark a given template as the **default template** for its *category and sub category*.

Document Name	Type	Category	SubCategory	Default
IFC	Master	Forms	IFC	<input checked="" type="checkbox"/>
Invoice	Master	Invoices	Invoice-Hospital	<input checked="" type="checkbox"/>
Statement	Master	Statements	Statement-Hospital	<input checked="" type="checkbox"/>
Invitation letter	Custom	Letters		<input checked="" type="checkbox"/>
My invoice template	Custom	Invoices	Invoice-Clinic	<input type="checkbox"/>
Medicare inv template	Custom	Invoices	Medicare	<input checked="" type="checkbox"/>

Editing an existing template

To make edits to existing templates, you will need to download the Word file by clicking on the **Download** button associated with the template.

						Add Template
Type	Category	SubCategory	Default	Last Updated	Action	
Master	Forms	IFC	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download	
Master	Invoices	Invoice-Hospital	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download	
Master	Statements	Statement-Hospital	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download	
Custom	Letters		<input checked="" type="checkbox"/>	17/7/2020 2:36 PM	Download	Upload X
Custom	Invoices	Medicare	<input checked="" type="checkbox"/>	8/9/2020 9:05 AM	Download	Upload X

Once you have downloaded the file, go ahead and open it, make the desired edits and **save** the document.

You may type whatever you'd like in plain text or add '**tokens**' to print things onto the invoice that change from invoice to invoice like patient **names**, **medicare/ health fund card numbers**, **servicing doctor**, etc.

[Click here to view the list of tokens for clinic invoices](#), or

[Click here to view the list of tokens for hospital invoices](#)

Once the document has been updated with the desired edits, it is ready to be re-uploaded. You can do this by going back to where you downloaded the template at **Settings > Templates**, finding the template downloaded and hitting its associated **Upload** button.

[Add Template](#)

Type	Category	SubCategory	Default	Last Updated	Action	
Master	Forms	IFC	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download	
Master	Invoices	Invoice-Hospital	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download	
Master	Statements	Statement-Hospital	<input checked="" type="checkbox"/>	30/6/2020 5:18 PM	Download	
Custom	Letters		<input checked="" type="checkbox"/>	17/7/2020 2:36 PM	Download	Upload X
Custom	Invoices	Medicare	<input checked="" type="checkbox"/>	8/9/2020 9:05 AM	Download	Upload X

How to Delete Clinic Invoices

Needing to remove an invoice? As long as the invoice *does not* have a **payment associated** with it, and the **accounting period** is *not yet closed*, invoices can be deleted.

Not sure what the **accounting period** is? [Click here](#) to learn more.

There are two places where you could do so:

1. Via the **Patient's Record**, or
2. Via the **Batch** in **Claiming Medical**

Additionally, there are two use cases for deleting invoices:

1. Deleting the entire invoice (all items within the invoice)
2. Deleting a part of the invoice (1 or some items deleted, but not all items)

Let's take a closer look at both options.

Deleting through the Patient's Record

Begin by opening the patient's record and click on the **Accounts** button.

Patient Details Other Appointments Recalls Accounts Episodes Communication Documents

This button reveals a patient's billing/ treatment history where **each line is an invoice**:

Account Status	All	Service Type	All	From	To
Inv# ↑	Date of Service	Doctor	Service Type	Inv Amount	
4	25/08/2020	Chandra, Pete	Medicare	\$ 134.30	
3	25/08/2020	Chandra, Pete	Medicare	\$ 38.75	

From here, simply double click on the invoice you wish to delete.

Patient Details	Other	Appointments	Recalls	Accounts	Episodes	Communication	Documents
Account Status	All	Service Type	All	From	To		
Inv# ↑	Date of Service	Doctor	Service Type	Inv Amount			
4	25/08/2020	Chandra, Pete	Medicare	\$ 134.30			
3	25/08/2020	Chandra, Pete	Medicare	\$ 38.75			

This will open up the invoice, revealing the item numbers inside.

From here, you may simply right click on the desired item and hit **delete**, enter a reason, and hit **OK** to delete the item.

Invoice Details

Invoice Number	4	Location	Eccles (ID:1)							
Service Type	Medicare - Outpatient	Servicing Doctor	Chandra, Pete (ID: 3)							
Payor	Medicare	Billing Notes	-							
Status	Awaiting Payment (\$134.30)	Referring Doctor	-							
Invoiced	\$134.30	Batch ID	0							
		Batch #								
		Batch Status	Open							
Show voided transactions Print Invoice										
Date of Service	Acc Period	Item Code	Item Description	Unit Price	QTY	GST	Charge inc GST	Audit Date	User	Status
25/08/2020	25/08/2020	110	Professional attendance at consulting rooms or hospital, by ...	\$ 134.30	1	\$ 0.00	\$ 134.30	25/08/2020 02:03 PM	Amir Balouchi (ACSS)	

Alternatively, you can delete invoices from the **Claiming Medical** section of FYDO, found under the **Claiming** tab.

Deleting through the Claiming Medical

Important Note: **Private** and **WorkCover** invoices will not appear here as this screen is only for invoices that are to be sent electronically.

Private invoices are invoices with the *Bill Type* set to *Private* in the billing screen.

Put your mouse over the **Claiming** tab and select **Claiming Medical**.



Dashboard



1

Claiming

Claiming Medical

2

Claiming Hospital

Receive Files

Processing and Payment Reports

You will now see all your batches. So select the batch holding the invoice(s) you wish to delete.

Now, double click on the batch holding the desired invoice to be deleted.

You will now see the invoice(s) inside the batch.

Important note: Pay attention to the number of items in the invoice to be deleted.

- If you wish to delete all of the items within the invoice, simply right click on the invoice here, and select **Delete Invoice**
- Otherwise, if you wish to only delete a portion of the invoice (some items, but not all), simply double click on the invoice to open it up. Then right click on the items to be deleted and select **Move Item**

Moving items out

Medicare/ DVA claims

- Items go into the **current, open batch** of the same bill type (e.g. Medicare)
- If no open batch is present, a **new one will be created**

Eclipse claims

- Items always go into a **new, closed batch**

Next, you will need to find the moved item(s) in the newly created invoice in the open/ closed batch, at the top of the **Claiming Medical** screen and delete as desired.

CLAIM DETAILS > BATCH DETAILS

Location	Eccles (ID: 1)	Batch ID	0
Practitioner	CHANDRA, Pete (ID: 3)	Batch Number	
Provider		Date Closed	
Type	Medicare	Batch Status	Open
Category	Specialist		

Patient Name ↓	MRN	DOS ↓	Inv	KG	Claimed	Items
BOLD, Katie	118	25/08/2020	6		173.05	2
BOLD, Katie		28/08/2020	7		173.05	2

Right-click context menu:

- Delete Invoice (highlighted with a red box)
- Edit Invoice
- Move Invoice Out
- Patient Screen
- View Items

Closing the Accounting Period

Closing the '**Accounting Period**' refers to **locking down** your financial figures up to a **given date** (usually the end of the month) so that they **cannot be changed**.

We **do not** recommend closing the accounting period for the last month, on the first day of the current month. Rather, give yourself seven to ten days to get your figures to a point where you are happy. That is, after all rejections and adjustments are made.

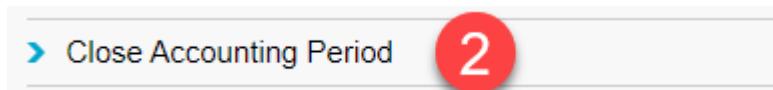
In other words, it ensures that the figures seen on your revenue report run out of FYDO match the figures seen on your bank account, to the cent. And that those figures then cannot be amended in FYDO.

So let's see where the accounting period is closed.

Start off by going over to settings.



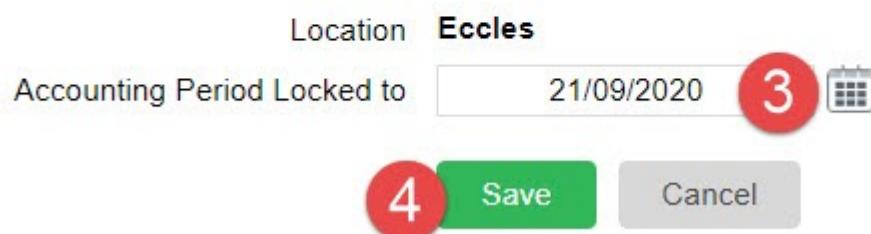
Then, click **Close Accounting Period**.



Enter the date you wish to **lock your figures** to and hit **Save**.



By locking the account period, transactions with an accounting period on or prior to the date below, will not be able to be modified nor deleted.



I should also mention that this action is recorded in FYDO's audit log, so you can see who closed the accounting period and when.

To view the audit log, go to **Settings**, then click on **Logs**.



SETTINGS



General

- Accommodation Categories
- Appointment Types
- Area Codes
- Booking Codes
- Cancelled Reasons
- Checkers - Letters
- Departments
- Deposit Types
- Doctors
- Doctor Specialities
- Document Types
- ECLIPSE Mapping
- End of Day Banking
- Health Funds
- Health Fund Participants
- Hospitals
- Invoice Messages
- Items
- Item Types

- Locations
- Logs 2
- Practices
- Printer Configuration
- Program Numbers
- Recall Reasons
- Referral Types
- Referring Doctors
- SMS History
- Staff Roles
- System Configuration
- Templates
 - SMS Templates
 - Templates
- Third Parties
- User Groups
- Users
- Webhooks

Clinic

- Appointments Setup
- Rooms

- Fee Management
 - Bulk Fee Update
 - Fee Levels
- Close Accounting Period



You will see a log similar to this when the accounting period is closed.

Amir Balouchi (ACSS)
(Backend)

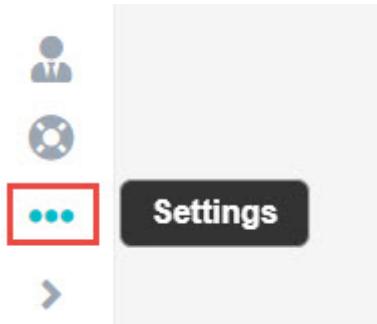
Accounting period closed for Eccles [ID - 1] - changed from 21/09/2020 to 30/09/2020

20/10/2020 5:22:54 PM

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	
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)

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**

➤ 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, click on **Edit** on the top right-hand corner of the page. Simply untick the **Active** box next to **Status** as shown below.

Number	3	Provider Number	Provider Number
Title	Dr	Specialty	Specialty
First Name	Howie	Email	Email
Surname	Dorough	Mobile	Mobile
Practice Name	Dorough	Alternate Phone1	Alternate Phone1
Address	Address	Created On	05/10/2022
Suburb	Suburb	Birthday	Birthday
Mailing Address	Mailing Address	Status	Active
Mailing Suburb	Mailing Suburb		
Practice Phone	Practice Phone		
Practice Email	Practice Email		

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

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

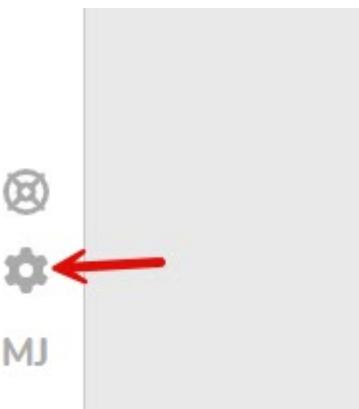
Show Inactive

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

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**

➤ [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:

[Add Referring Doctor](#)

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.

[Edit](#)

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

Referring Doctor Details

Number	123456AA
Title	Dr
First Name	Clark
Surname	Griswold
Practice Name	Dr Griswold's Medical Centre
Address	1 Long Street
Suburb	LEEDERVILLE
WA	6007
Mailing Address	
Mailing Suburb	
Practice Phone	(00)5555-6666
Practice Fax	()-
Practice Email	
Type	GP
Speciality	
Email	drgriswold@mypractise.com.au
Mobile	0400-111-222
Alternate Phone1	() -
Alternate Phone2	() -
Created On	11/11/2025
Birthdate	01/01/1990
Status	<input checked="" type="checkbox"/> Active

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. You can also upload any Doctors files that may be applicable such as APHRA, Drivers Licence, etc.

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

Save

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.

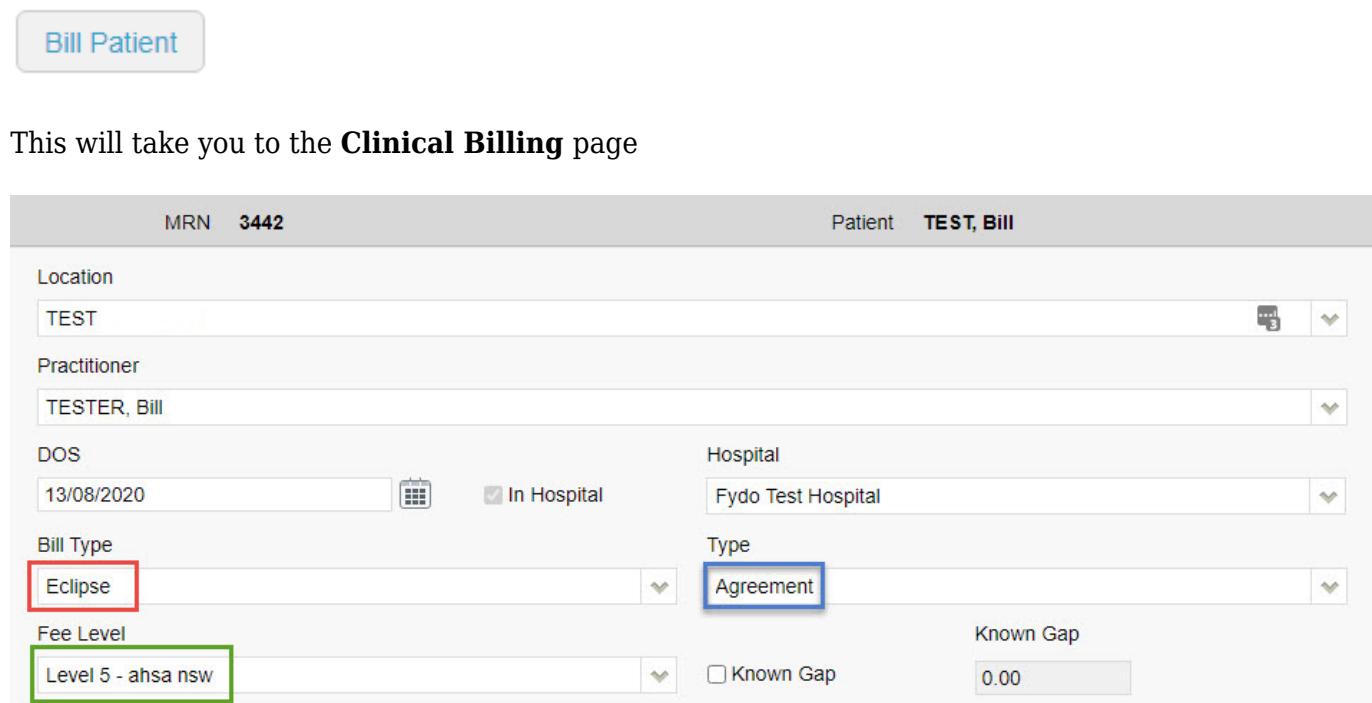
[Eclipse Clinic Billing](#)

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'!



MRN 3442 Patient TEST, Bill

Location TEST

Practitioner TESTER, Bill

DOS 13/08/2020 In Hospital Hospital Fydo Test Hospital

Bill Type Eclipse Type Agreement

Fee Level Level 5 - ahsa nsw Known Gap 0.00

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!

Referral

Referral Flag

Previous Referrals

Referring Doctor

ADD REFERRING DOCTOR

Referral To

TESTER, Marko x

TESTER, Dr Bill x

Referral Date: 19/05/2020

Period: 12

First Consult: 22/05/2020

Site Referral (global)

ADD ANOTHER REFERRAL

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

Add Items

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!

DOS	Item	Description
11/08/2020	<input type="button" value="Calendar"/>	<input type="text"/>
		

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

Review Charges

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](#)

Cancel

Save

Save & Print

- **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**.

ECLIPSE

<input type="checkbox"/> Accident Indicator ?	IFC Issued	<input type="text" value="Not obtained"/> ?
<input type="checkbox"/> Compensation Indicator ?	Admission Date	<input type="text"/> ?
<input type="checkbox"/> Financial Interest Indicator ?	Discharge Date	<input type="text"/> ?

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.

[Send electronically](#)

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!](#)

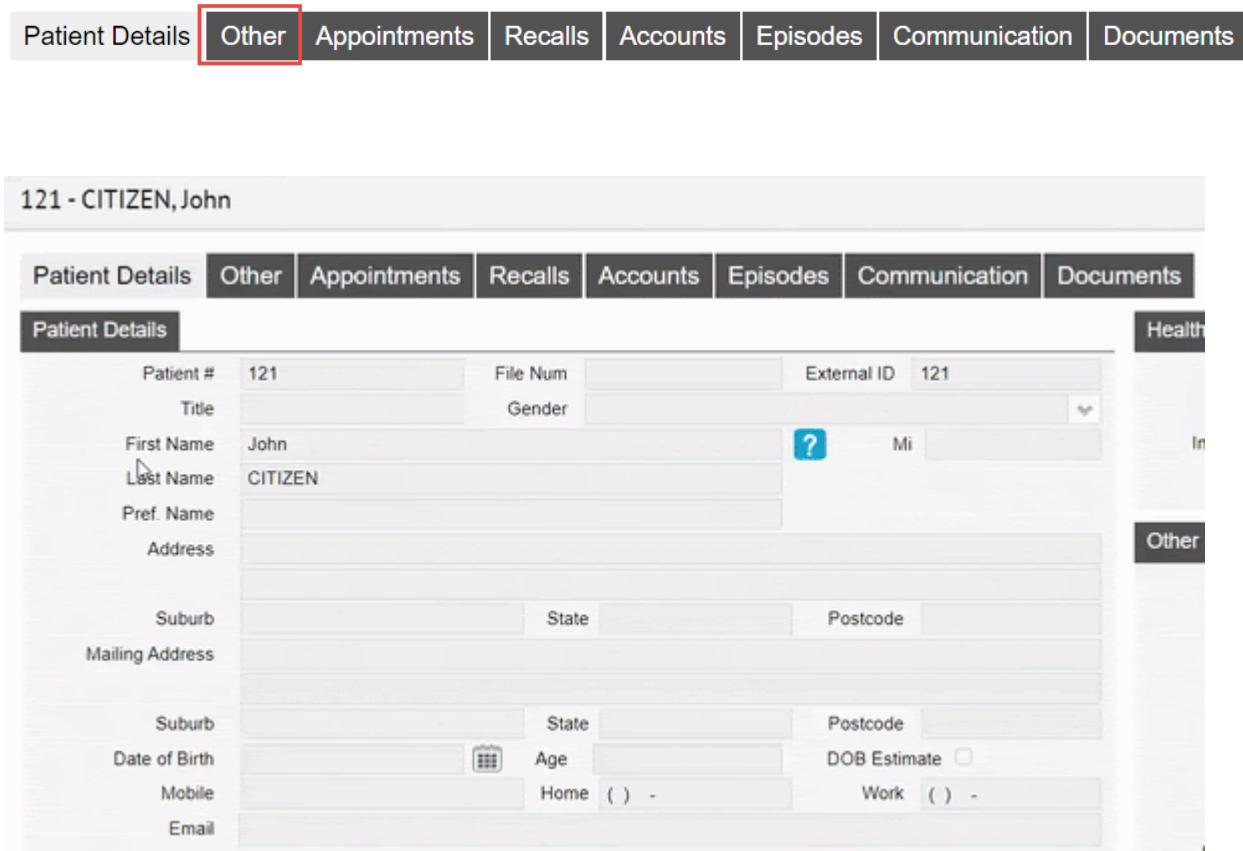
Billing DVA Community Nursing (Clinic)

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.



Patient Details **Other** Appointments Recalls Accounts Episodes Communication Documents

121 - CITIZEN, John

Patient Details

Patient #	121	File Num		External ID	121
Title		Gender			
First Name	John		?	Mi	
Last Name	CITIZEN				
Pref. Name					
Address					
Suburb		State		Postcode	
Mailing Address					
Suburb		State		Postcode	
Date of Birth	<input type="text"/>	Age	<input type="text"/>	DOB Estimate	<input type="checkbox"/>
Mobile	<input type="text"/>	Home	() -	Work	() -
Email					

Once finished, hit **Save**.

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](#)

MRN	121	Patient	CITIZEN, John
Location			
Eccles			
Practitioner			
ECCLES UNIT, Nursing			
DOS	21/08/2020 <input type="button" value="Calendar"/>	<input type="checkbox"/> In Hospital	Hospital
Bill Type	Veterans	Type	
Fee Level	Level 1 - MBS	Known Gap	<input type="checkbox"/> Known Gap 0.00

Referral			
<p>Referral Flag</p> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"></div>			
<p>Previous Referrals</p> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"></div>			
Referring Doctor	ADD REFERRING DOCTOR		Referral To
TEST, Test Dr x			
Referral Date 01/07/2020 <input type="button" value="Calendar"/>	Period 12	First Consult <input type="button" value="Calendar"/>	<input type="checkbox"/> Site Referral (global)
ADD ANOTHER REFERRAL			

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!

Save

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.

Community Nursing Information

Admission Date <input type="text" value="22/10/2018"/> <input type="button" value=""/>	Discharge Date <input type="text"/> <input type="button" value=""/>
Clinical Nurse Consultant (CNC)	
Hours <input type="text" value="0"/>	Visits <input type="text" value="0"/>
Minutes <input type="text" value="0"/>	
Nursing Support Staff (NSS)	
Hours <input type="text" value="0"/>	Visits <input type="text" value="0"/>
Minutes <input type="text" value="0"/>	
Registered Nurse (RN)	
Hours <input type="text" value="0"/>	Visits <input type="text" value="0"/>
Minutes <input type="text" value="0"/>	
Break in Episode	
Type <input type="text"/>	<input type="button" value=""/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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:

DOS	Item	Description
11/08/2020 <input type="button" value=""/>	<input type="text"/>	

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

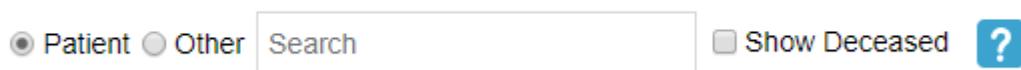
- **Review Charges**
- **Save**

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.



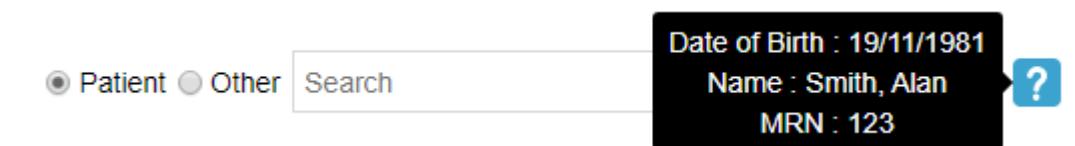
A screenshot of a search interface. It features two radio buttons: 'Patient' (selected) and 'Other'. To the right is a search bar with the placeholder 'Search'. Below the search bar is a checkbox labeled 'Show Deceased'. A blue question mark icon is located to the right of the checkbox.

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.



A screenshot of the same search interface as above, but with a red arrow pointing to the blue question mark icon. A tooltip box has appeared, containing patient details: 'Date of Birth : 19/11/1981', 'Name : Smith, Alan', and 'MRN : 123'.

This will bring up a helpful menu like so:



A screenshot of the search interface with the 'Patient' radio button selected. A tooltip box is displayed, showing the patient's details: 'Date of Birth : 19/11/1981', 'Name : Smith, Alan', and 'MRN : 123'. A blue question mark icon is also present in the tooltip box.

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

Patient:



A screenshot of the search interface with the 'Patient' radio button selected. A red arrow points to the 'Patient' radio button. A tooltip box is displayed, showing the patient's details: 'Date of Birth : 19/11/1981', 'Name : Smith, Alan', and 'MRN : 123'. A blue question mark icon is also present in the tooltip box.

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.

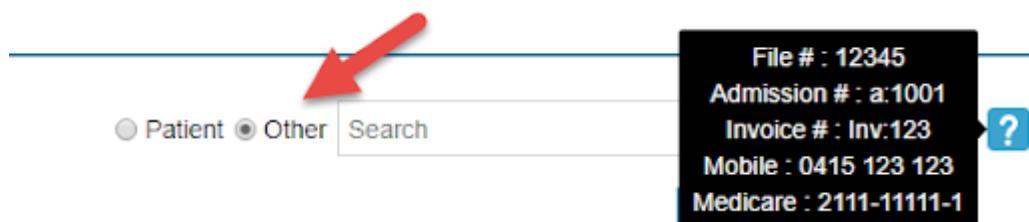
MRN: A search by the patient's **Medical Record Number**

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**.

A screenshot of the 'Patient Details' screen. The top bar is labeled 'Patient Details'. Below it is a table with the following data:

Patient #	3444	File Num	12345	External ID	7210
Title	Mr	Gender	Male		
First Name	Alan			?	Mi
Last Name	SMITH				

A red arrow points to the 'File Num' field, which contains the value '12345'.

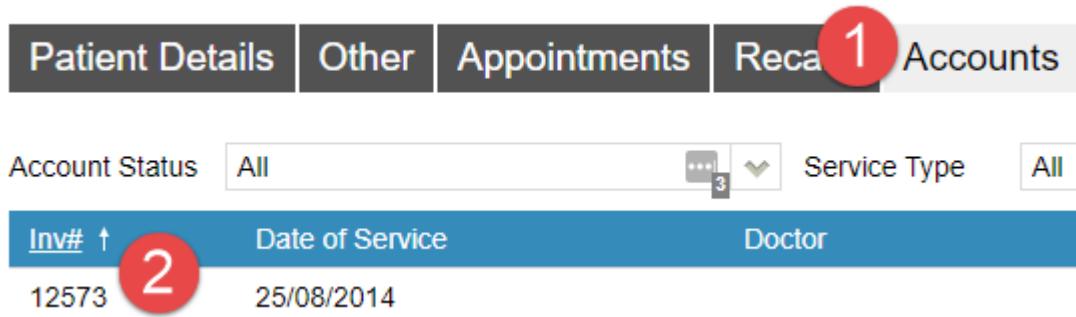
Admission #: Admission number for the patient (this is a number for patients that have Hospital episodes). Can be found in **Episodes**, from the **Patient Details** screen.

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



Patient Details	Other	Appointments	Recalls	Accounts	Episodes	Communications
No.	Adm #	Adm. Date	Dis. Date	Sts	Nights	
3	1497	23/01/2019	23/01/2019	Discharged	D/O	
2	1234	31/05/2018	31/05/2018	Discharged	D/O	
1	1004	04/10/2017	04/10/2017	Discharged	D/O	

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 #**



Patient Details	Other	Appointments	Recalls	1 Accounts
Account Status	All	3	Service Type	All
Inv# ↑	Date of Service	Doctor		
12573	25/08/2014	Doctor		

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.

Patient Details

A similar patient was found in the database

MRN - **176** Test PATIENT

with DOB - 01/01/2000

and Address - 123 Test Drive, REDCLIFFE, QLD, 4020

Do you still wish to save this patient or cancel?



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**

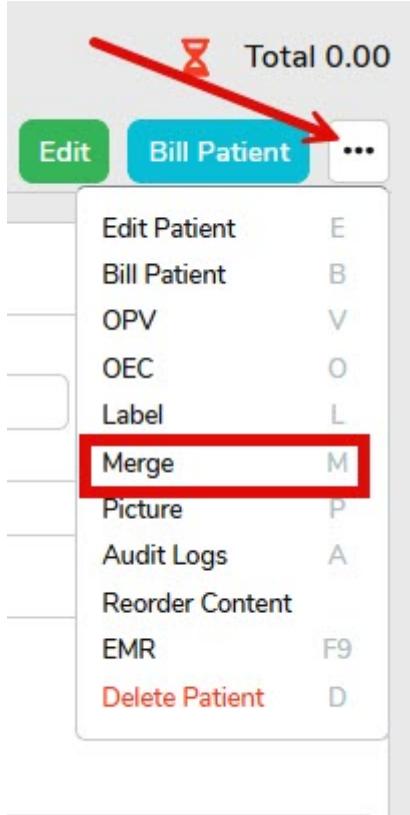
If you enter just the first and last name, it will not try to find similar patients, you do need to enter the date of birth for the check to occur.

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 3 dots which will display a drop-down menu with a Merge option.



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

Merge Patient

 Search for patient....

Select a medical record where MRN 192 will be merged into. This means MRN 192 will no longer exist, and all appointments/episodes and invoices will be moved to the selected MRN.

Merge Information

MRN 192	→	MRN
DOB 01/01/2000	→	DOB
Sex	→	Sex
Patient PATIENT, Test	→	Patient

[Cancel](#)

[Merge Patient](#)

Simply search for the patient you wish to merge the current one with. You will see the **Patient Lookup** box, containing any patients found.

Patient Lookup



Patient Other patient, test Search

Surname	Firstname	MRN	FileNo	Address	DOB	Age
PATIENT	Test	176		123 Test Drive REDCLIFFE	01/01/2000	25
PATIENT	Test	192		123 Test Drive SHORNCLIFFE	01/01/2000	25

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

Merge Patient

patient, test

Select a medical record where MRN 192 will be merged into. This means MRN 192 will no longer exist, and all appointments/episodes and invoices will be moved to the selected MRN.

Merge Information

MRN 192	→	MRN 176
DOB 01/01/2000	→	DOB 01/01/2000
Sex	→	Sex
Patient PATIENT, Test	→	Patient PATIENT, Test

Cancel

Merge Patient

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.

Merge Patient

This patient cannot be merged with the selected patient as the name and/or date of birth do not match.

This patient: **Test PATIENT** DOB: **01/01/2001**
Patient merged into: **Test PATIENT** DOB: **01/01/2000**

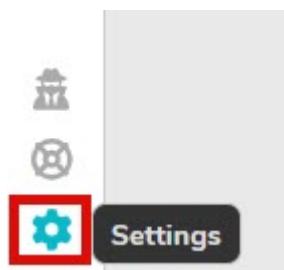
OK

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

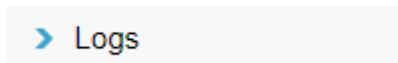
The Audit Log

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	Action
Madaleine James (Altura) (Backend)	Patient Merge - Test PATIENT - MRN: 192 merged into MRN: 176. MRN: 192 will no longer exist.	02/07/2025 9:29:41 AM	

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.