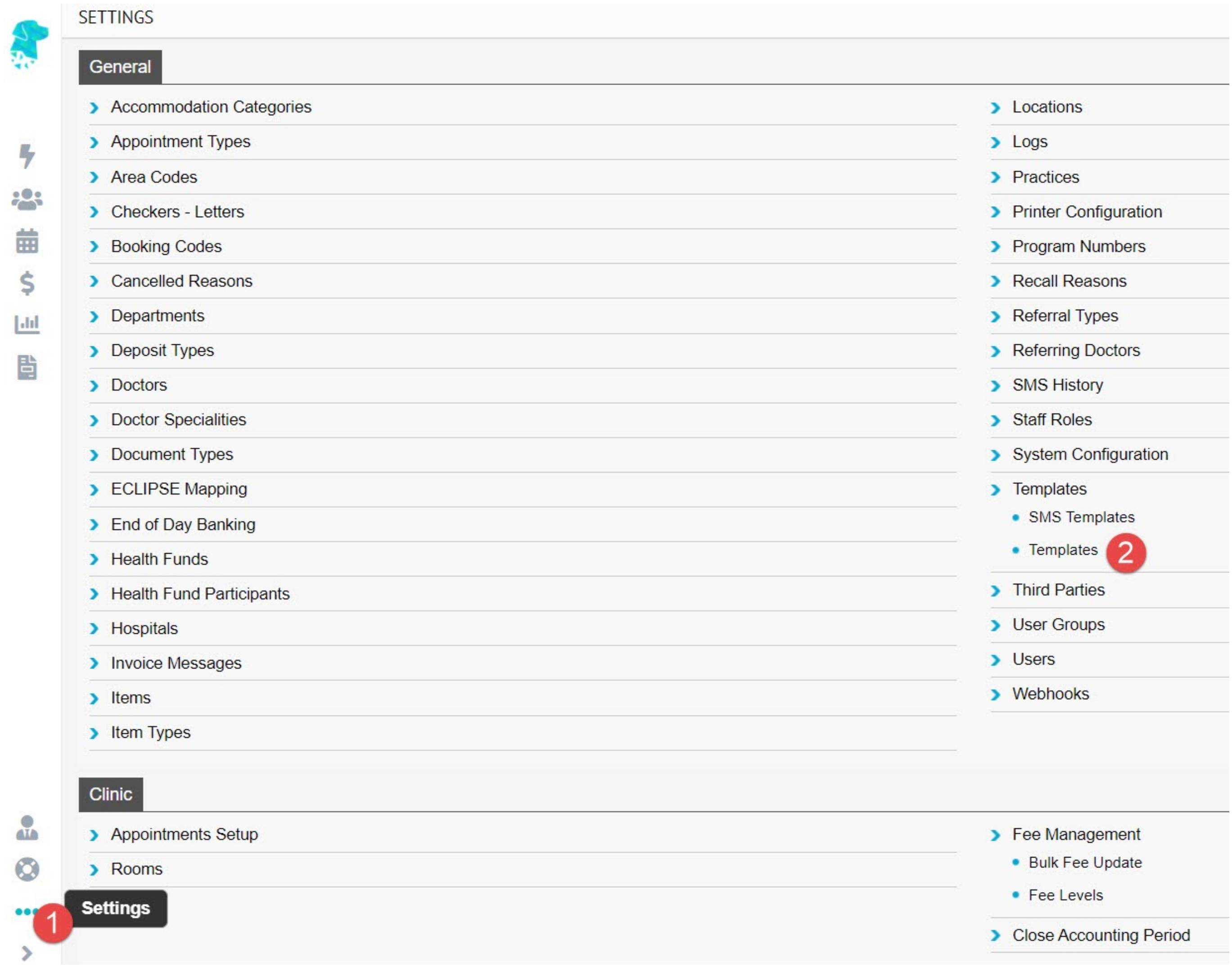
# Uploading a Clinic Invoice Template

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**.




This will reveal the templates currently in your FYDO account.

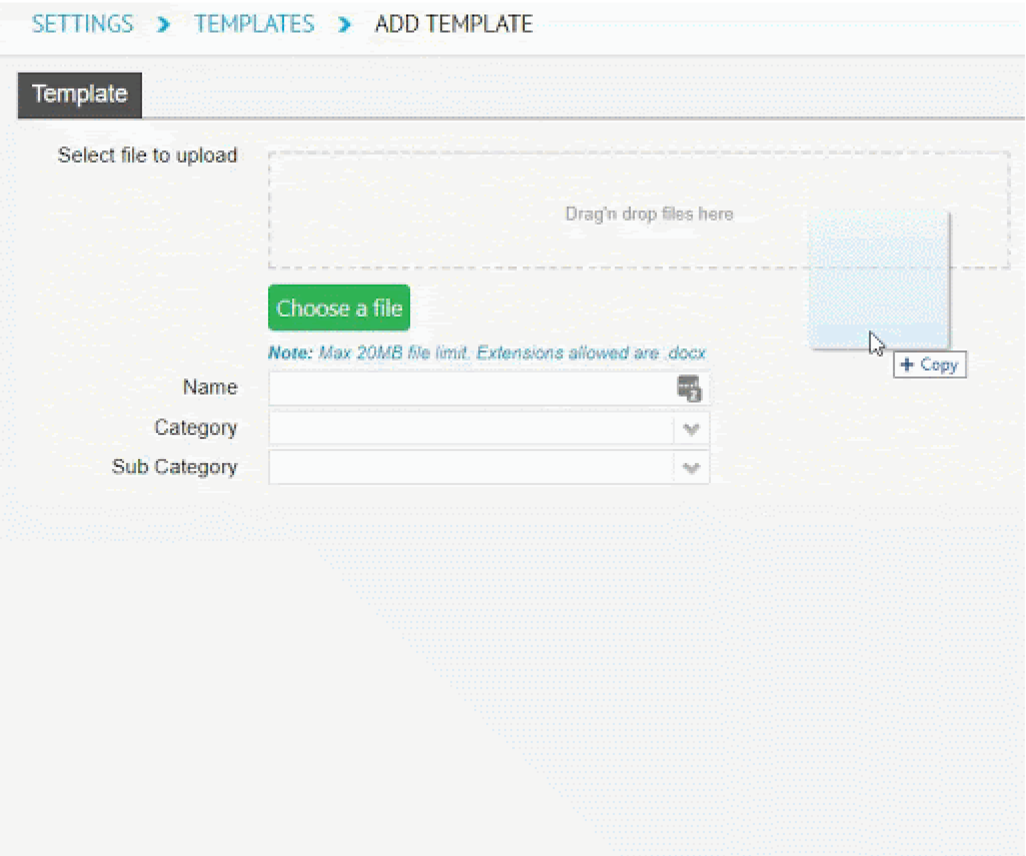
***Note:*** an invoice template is necessary for each *type* of invoice; such as Medicare, DVA, and Private.

### 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.

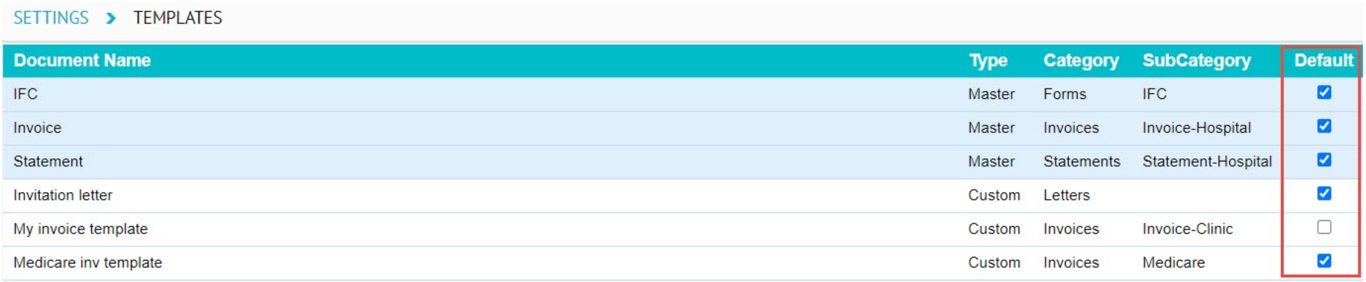

Then, you will need to browse your computer for the template file or simply drag it in, as shown below.

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




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*.

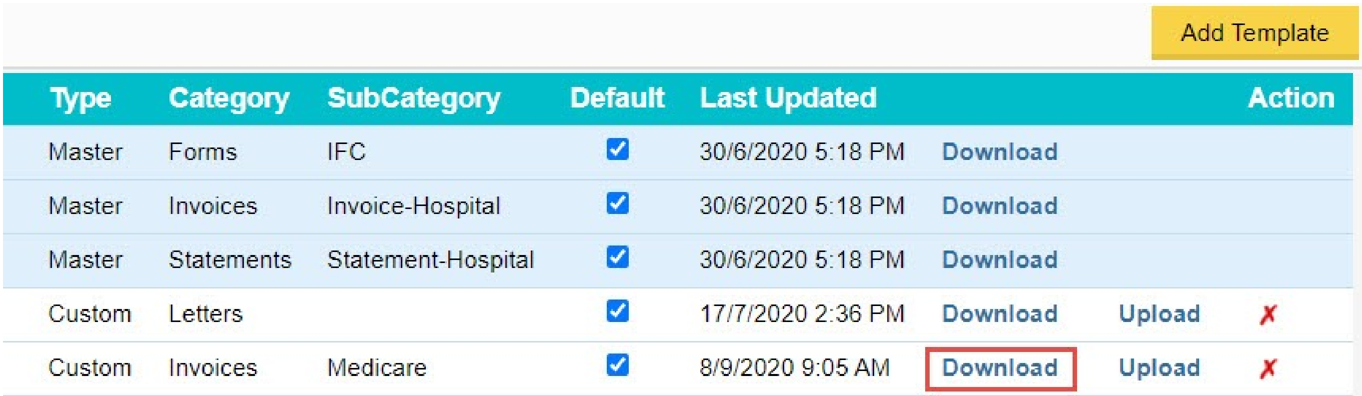


SETTINGS > TEMPLATES

| Document Name | Type | Category | SubCategory | Default |
|---|---|---|---|---|
| IFC | Master | Forms | IFC | ☑ |
| Invoice | Master | Invoices | Invoice-Hospital | ☑ |
| Statement | Master | Statements | Statement-Hospital | ☑ |
| Invitation letter | Custom | Letters | | ☑ |
| My invoice template | Custom | Invoices | Invoice-Clinic | ☐ |
| Medicare inv template | Custom | Invoices | Medicare | ☑ |

### 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 | ☑ | 30/6/2020 5:18 PM | Download | | |
| Master | Invoices | Invoice-Hospital | ☑ | 30/6/2020 5:18 PM | Download | | |
| Master | Statements | Statement-Hospital | ☑ | 30/6/2020 5:18 PM | Download | | |
| Custom | Letters | | ☑ | 17/7/2020 2:36 PM | Download | Upload | ✗ |
| Custom | Invoices | Medicare | ☑ | 8/9/2020 9:05 AM | Download | Upload | ✗ |

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 | ☑ | 30/6/2020 5:18 PM | Download | | |
| Master | Invoices | Invoice-Hospital | ☑ | 30/6/2020 5:18 PM | Download | | |
| Master | Statements | Statement-Hospital | ☑ | 30/6/2020 5:18 PM | Download | | |
| Custom | Letters | | ☑ | 17/7/2020 2:36 PM | Download | Upload | ✗ |
| Custom | Invoices | Medicare | ☑ | 8/9/2020 9:05 AM | Download | Upload | ✗ |

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# 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:

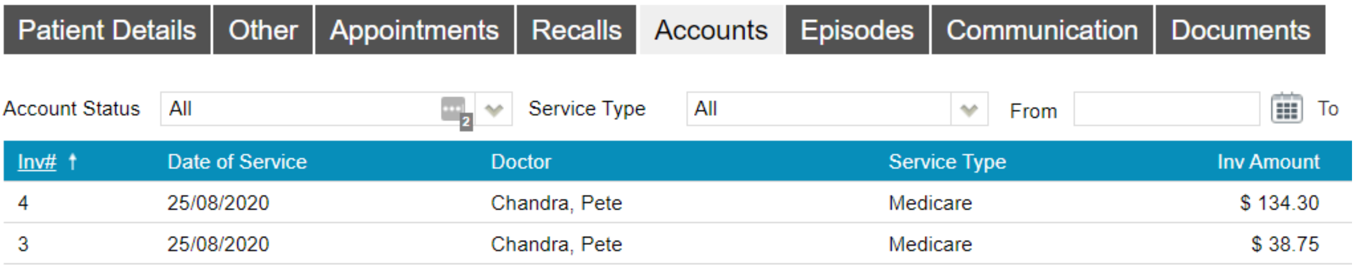
1. Deleting the entire invoice (all items within the invoice)
2. Deleting a part of the invoice (1 or some items deleted, but not all items)

Let's take a closer look at both options.

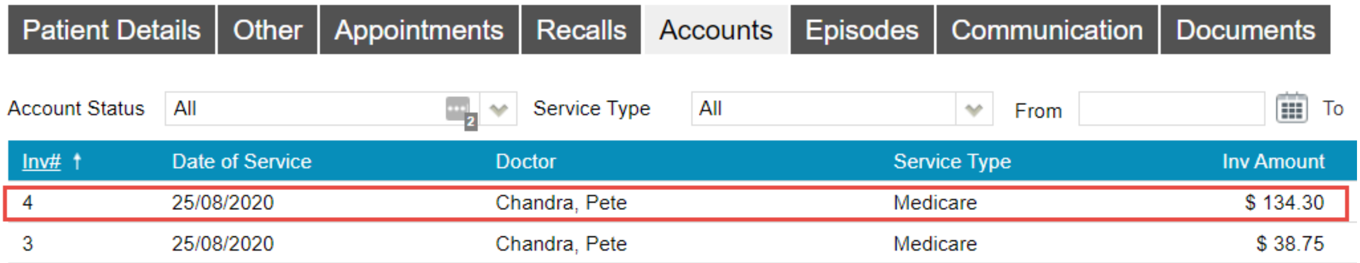
**Deleting through the Patient's Record**

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


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

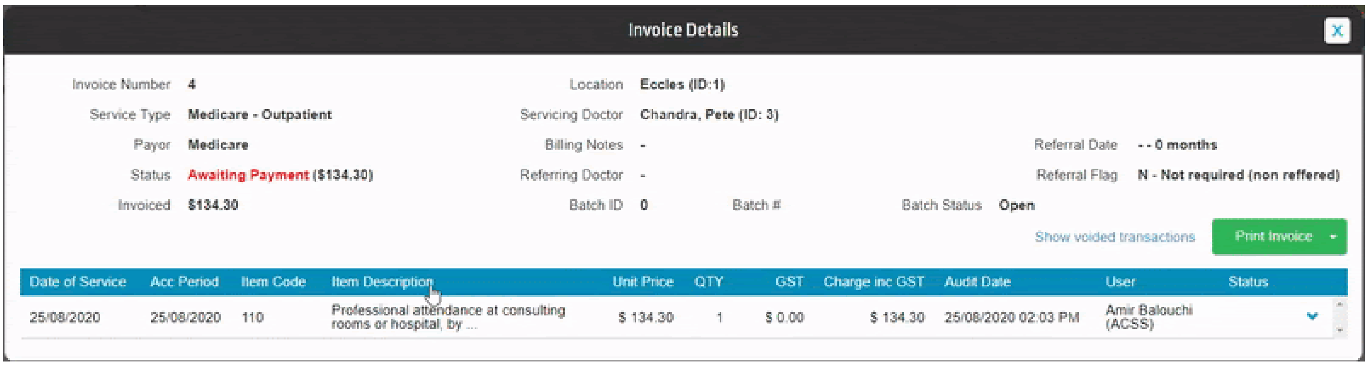



From here, simply double click on the invoice you wish to delete.




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.



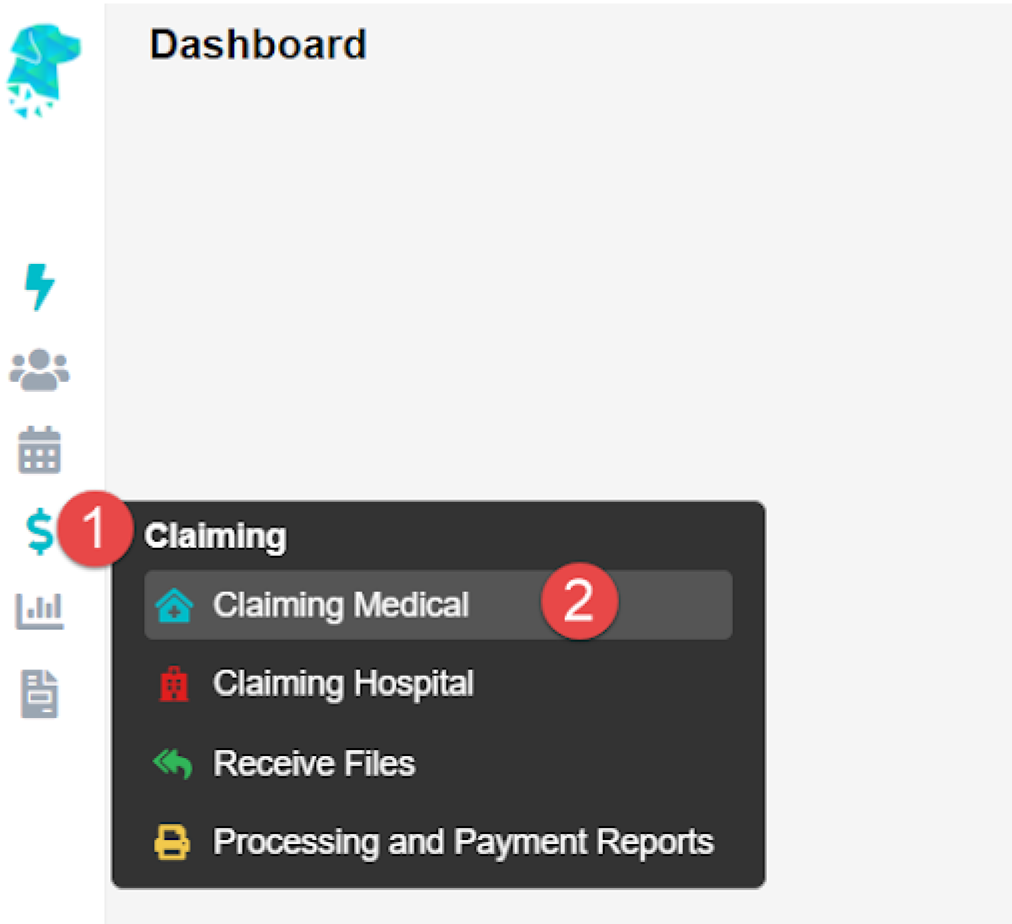

Alternatively, you can delete invoices from the **Claiming Medical** section of FYDO, found under the **Claiming** tab.

### 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**.




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.

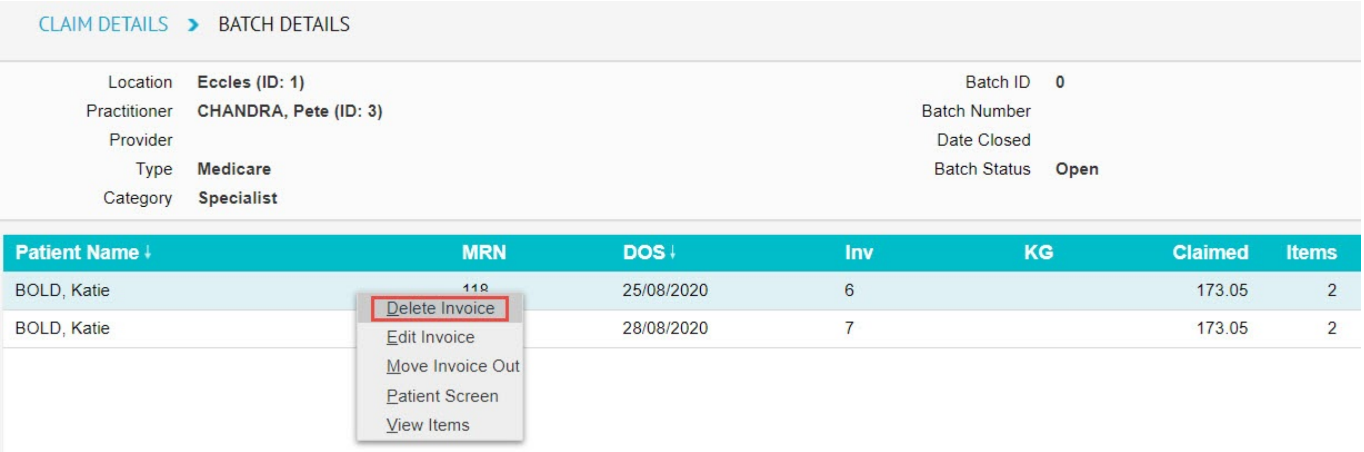
- If you wish to delete all of the items within the invoice, simply right click on the invoice here, and select **Delete Invoice**

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




# 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.

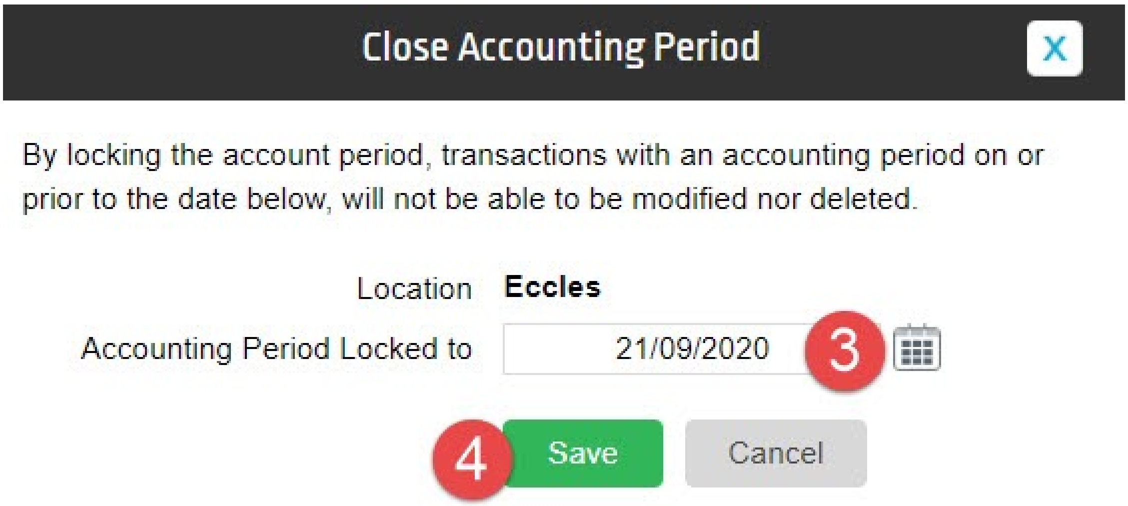
In other words, it ensures that the figures seen on your revenue report run out of FYDO match the figures seen on your bank account, to the cent. And that those figures then cannot be amended in FYDO.

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

Start off by going over to settings.

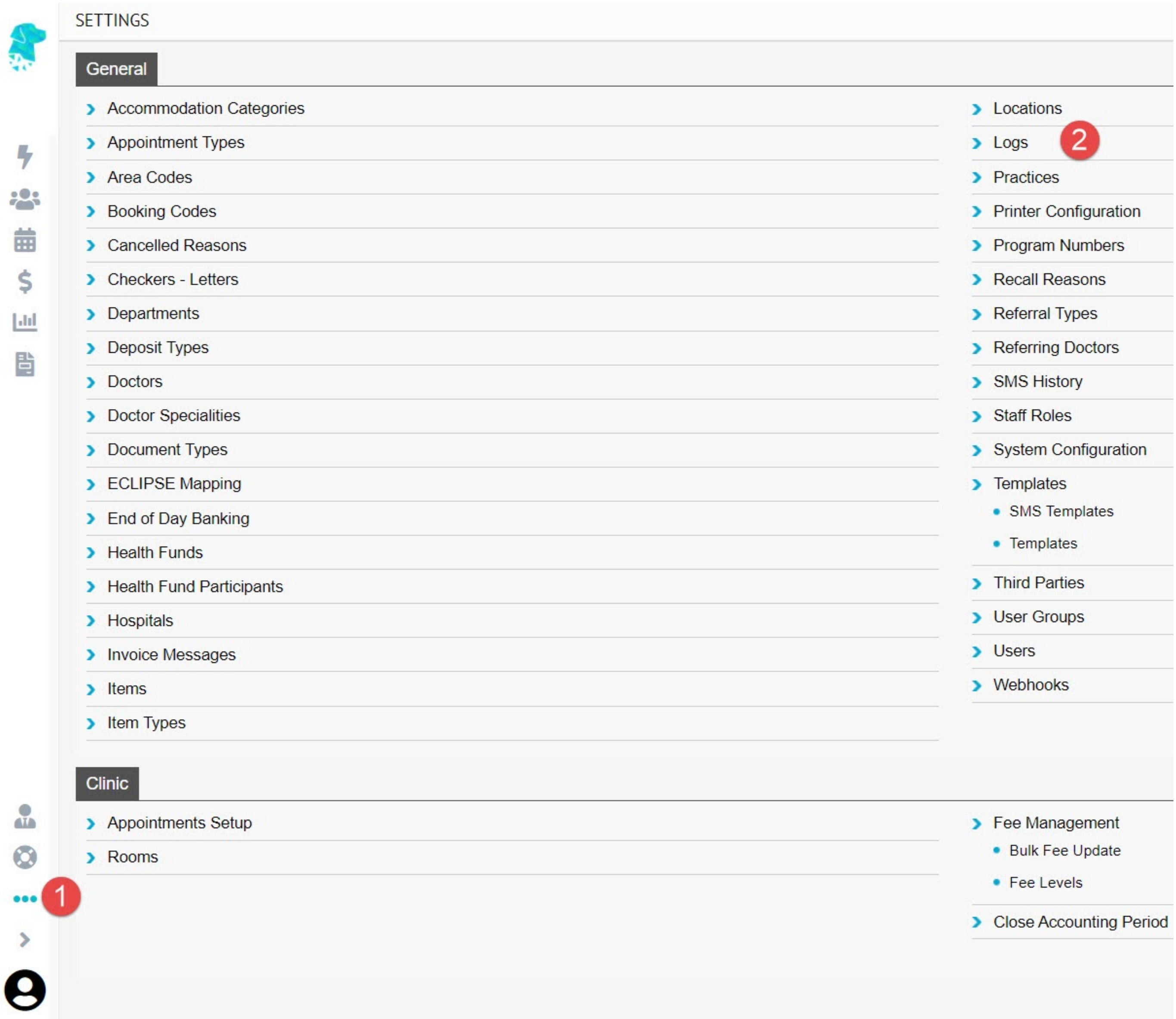
Then, click **Close Accounting Period**.


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




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**.




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 |

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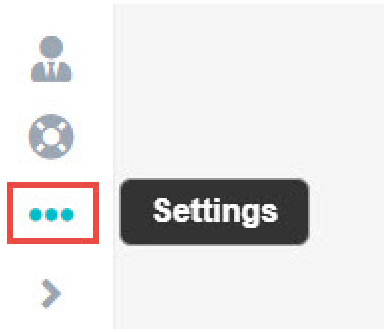
# [Adding MBS items – Clinic]

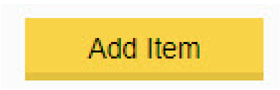
Want to know how to add items into Fydo? Follow the below steps and you'll be billing them in no time!

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

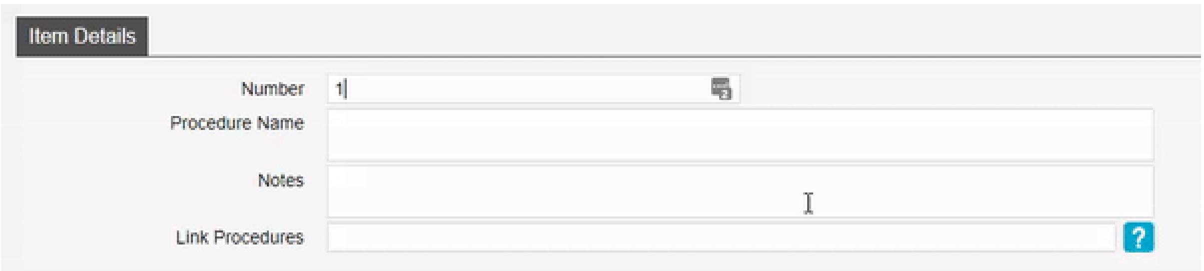



Then select **Items,** this will display a list of all your current items.

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




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




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

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


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

Things such as:

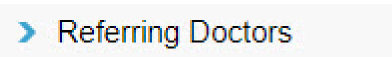
- Fees (Medicare and DVA rates)
- Description
- Rule (If it has one e.g Surgical step down)

# Making a Referring Doctor Inactive

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

1.Click on **Settings**

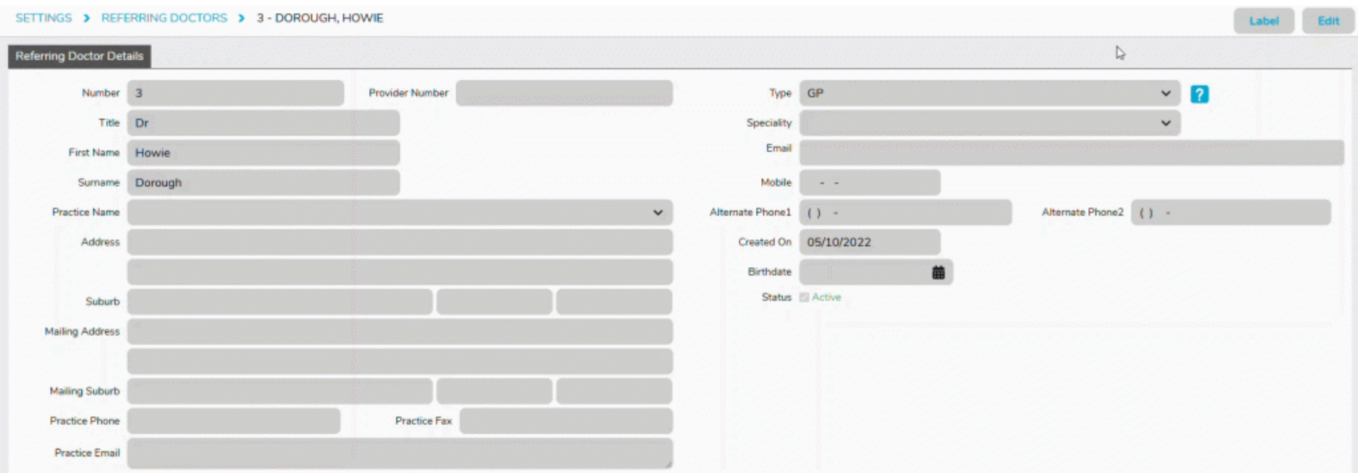

2. Then, **Referring Doctors**




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

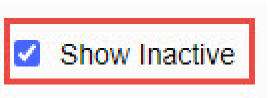
3. Select the doctor you wish to make **Inactive** by clicking anywhere on their row in the list of doctors.

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




Now the doctor has been made **Inactive**; 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.




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

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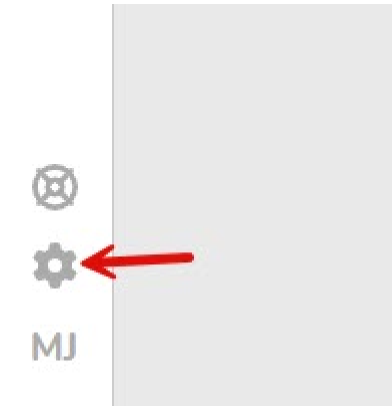
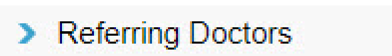
# Referring Doctors

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

1. Click on **Settings**

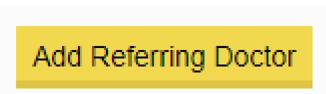



2. Then, **Referring Doctors**




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

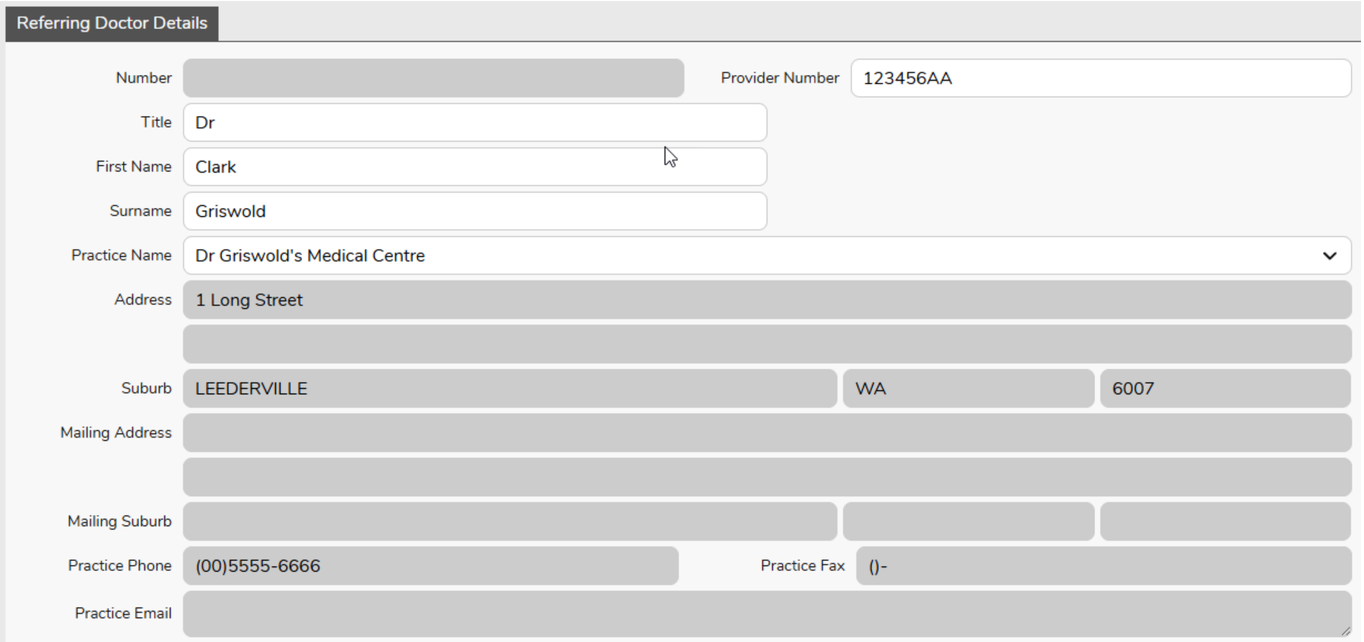
To **add** a referring doctor, click the yellow **Add Referring Doctor** button on the top right hand corner of your screen:

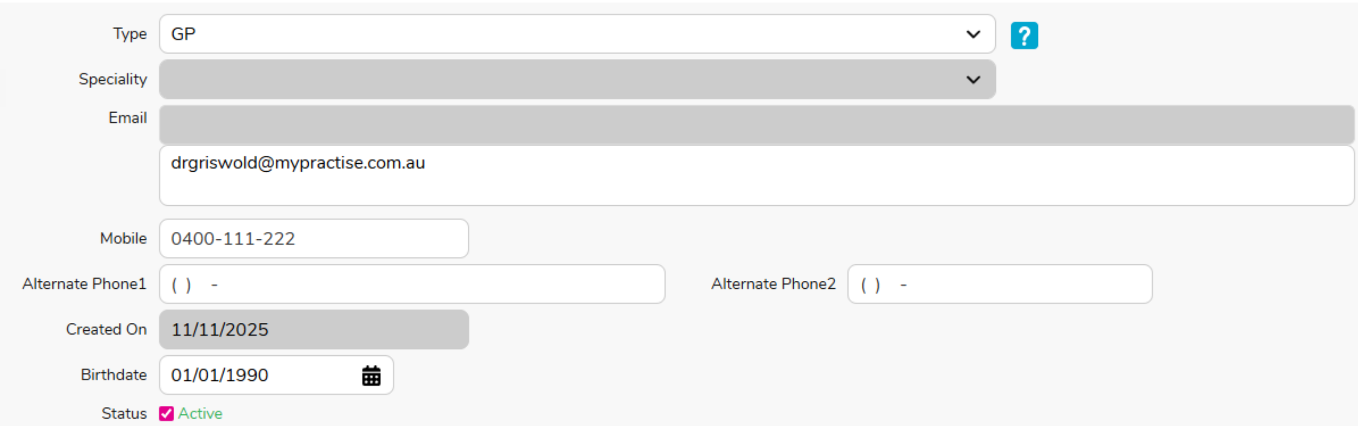



To **Edit** the details of an existing doctor, simply click **anywhere** along the row for that doctor, and you will be taken to the edit screen:

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. 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.


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

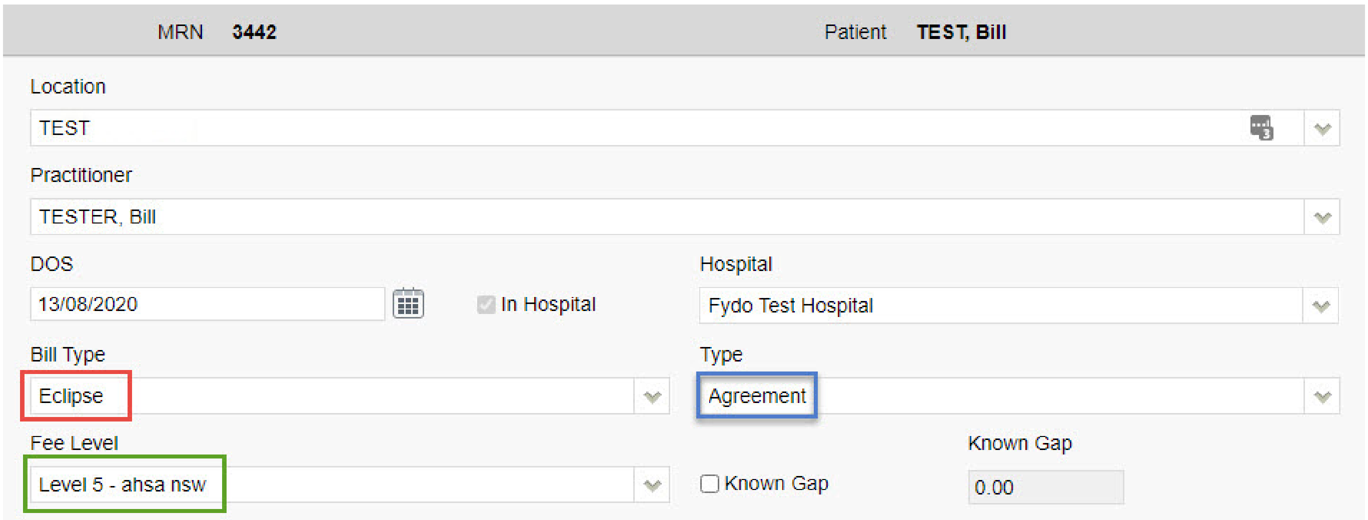
Set up your patient and ready to bill? Read ahead to find out how to submit claims to **Health Funds** via **Eclipse.**

***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**

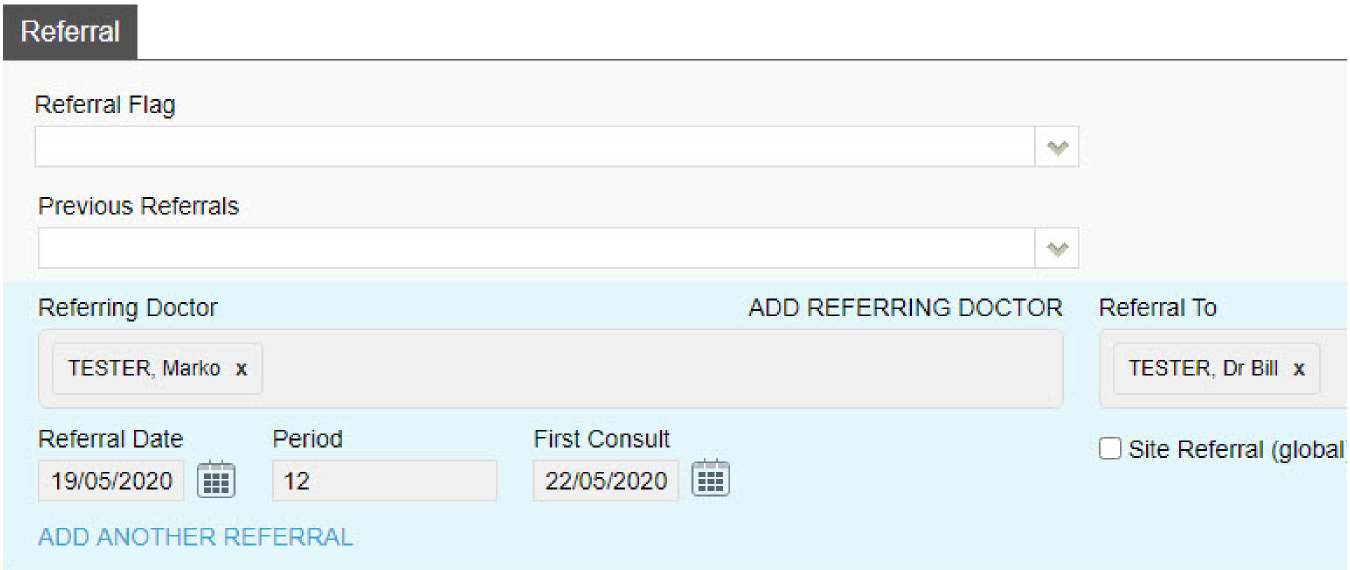
The main fields to ensure are correct for **Eclipse** are the highlighted ones above, and outlined below:

- **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.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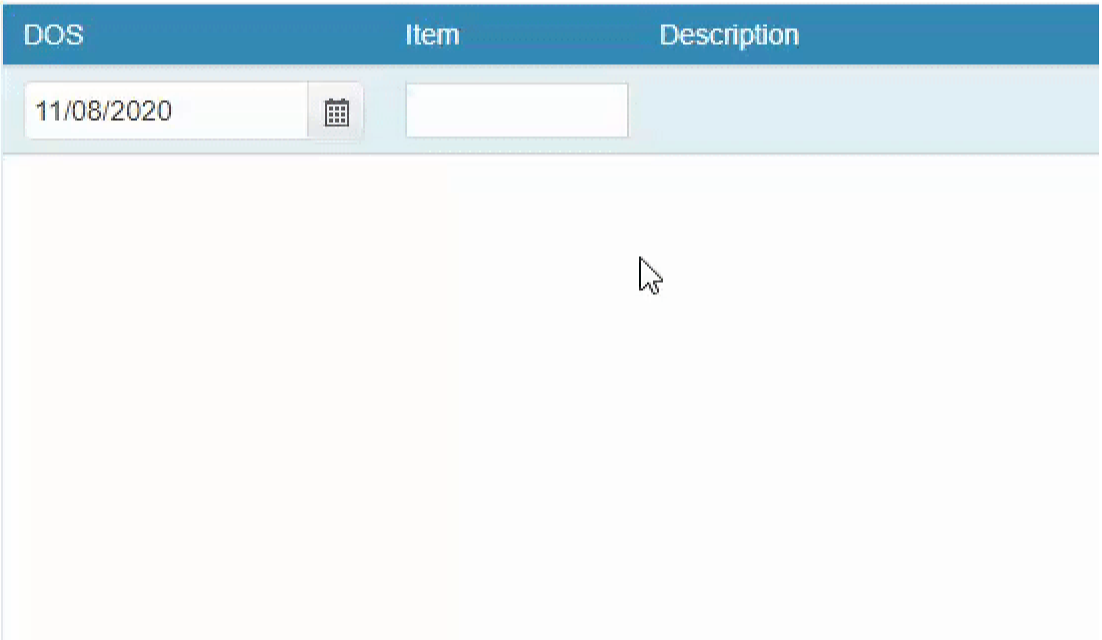
**Clinic Billing**

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.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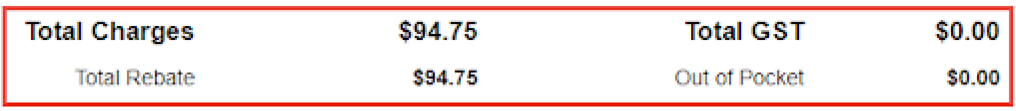
**Clinic Review Charges**

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.

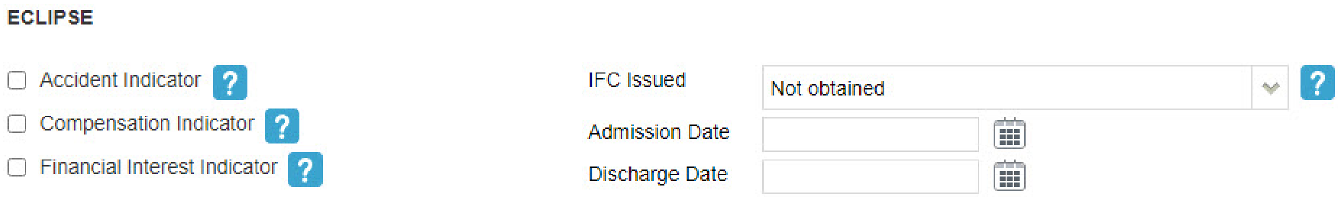
You will also be able to see the **Total Charges** for the items you have billed like so:



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, 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!](#)*

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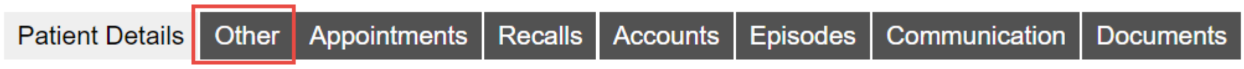
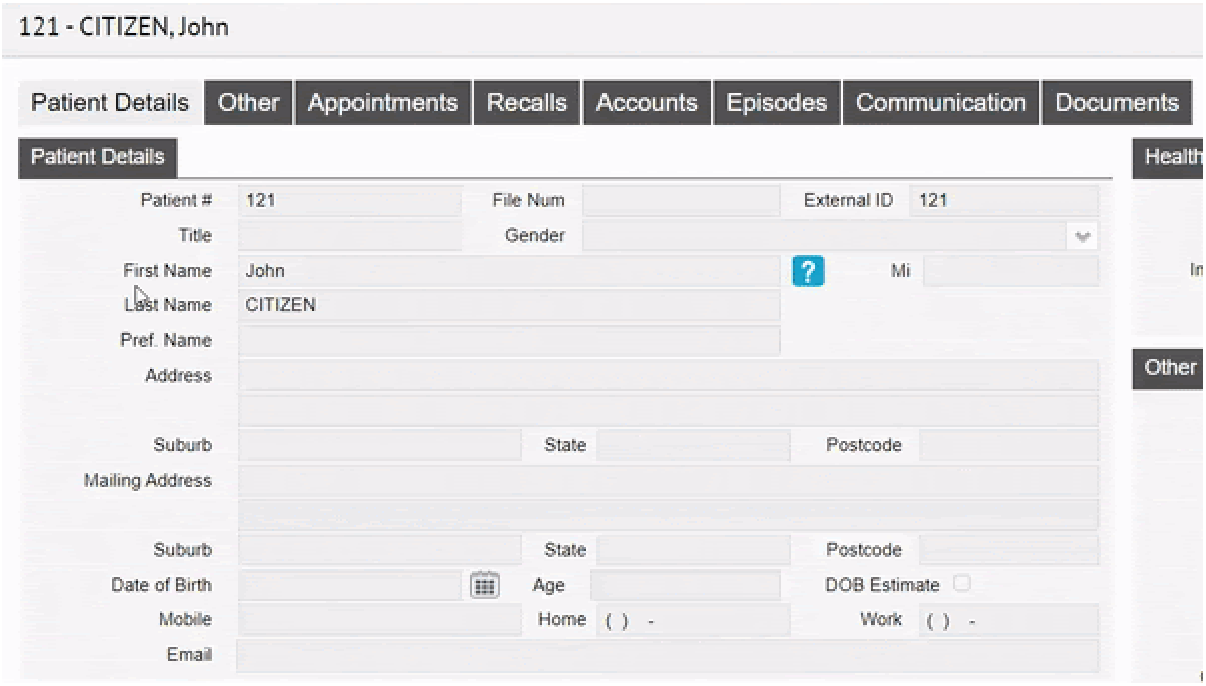
# [Billing DVA Community Nursing (Clinic)](#)

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.

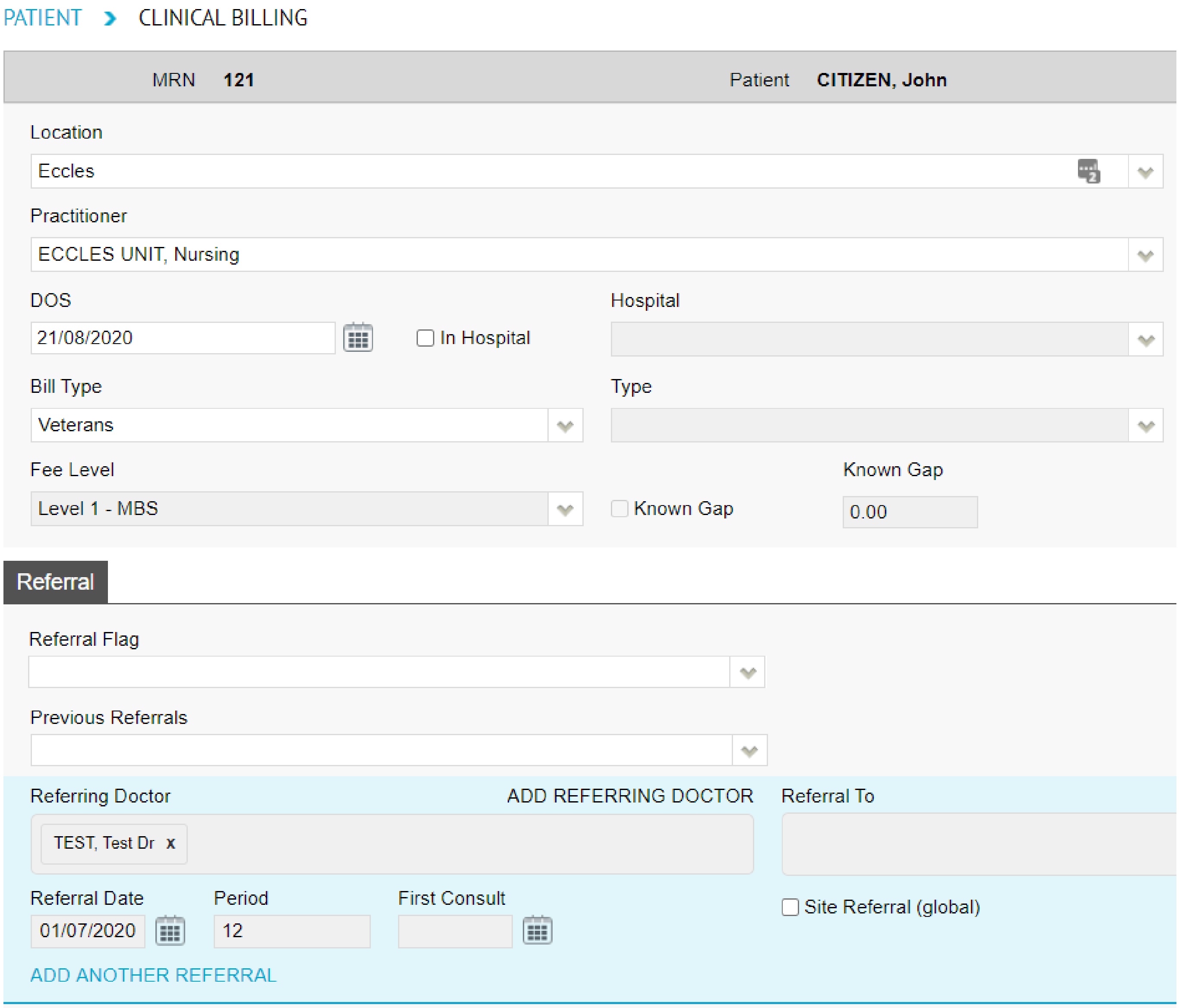
- **Location:** the location where the service took place. If you only have one, it will be defaulted
- **Practitioner:** the practitioner who performed the service. If you only have one, it will be defaulted
- **DOS:** date of service
- **Referring Doctor**

***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*



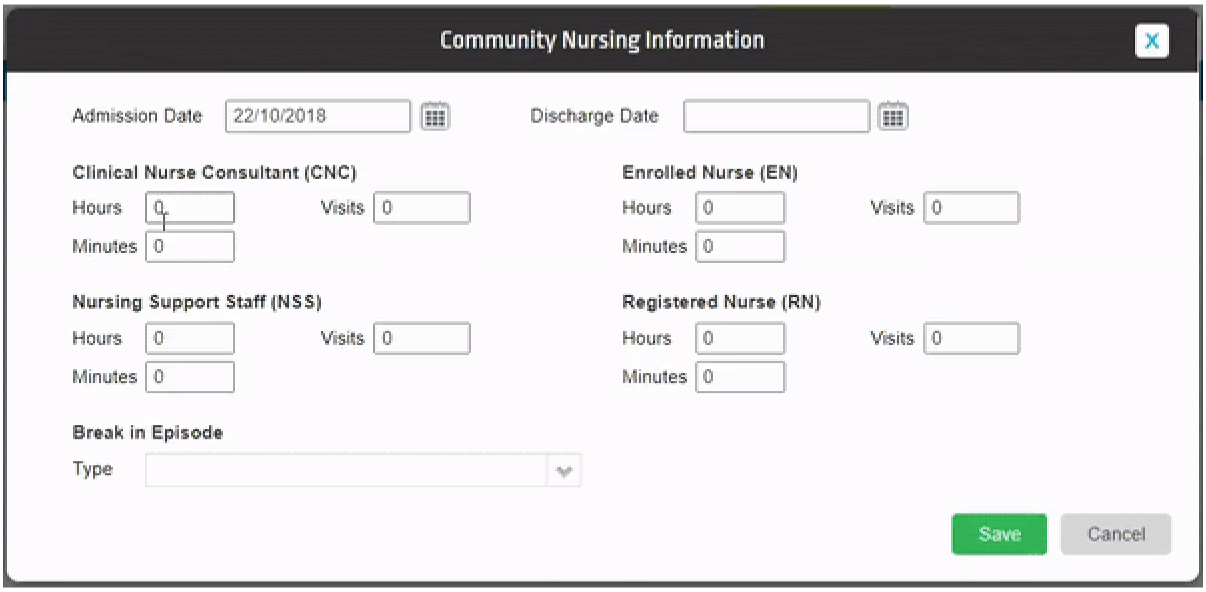

***Conditional:*** if you have entered a referral on the patient's record and do not see it in the billing screen, you may click on the '**Previous Referrals**' drop down to view all previous entered referrals and select the desired one.

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**'.

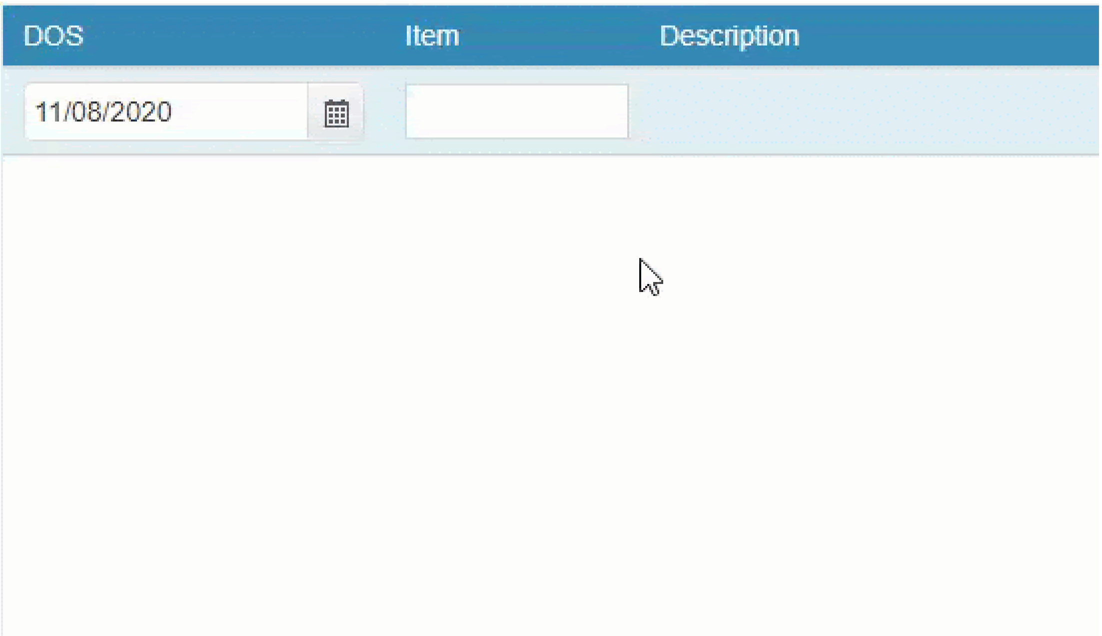
***Note:*** hours are only required to be reported when *core items* are billed. They are not required if you are billing *consumables* only.

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!]*

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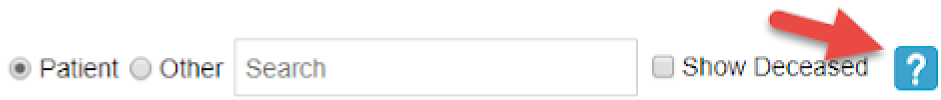
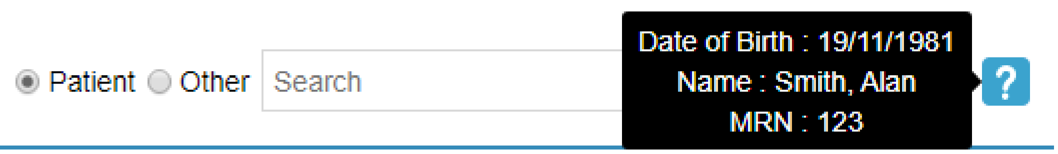
# Searching for a Patient

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.

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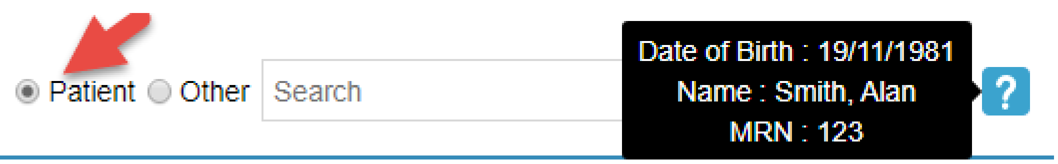
**Patient:**



**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.

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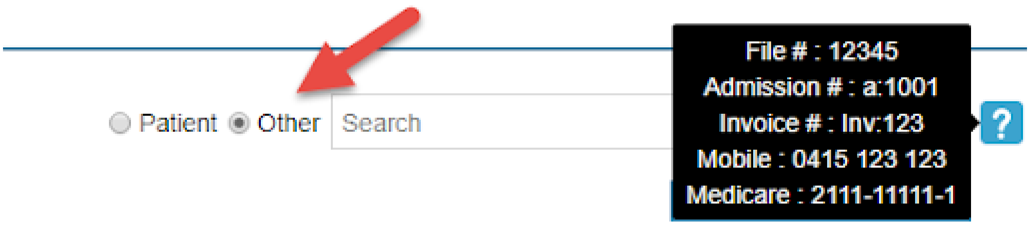
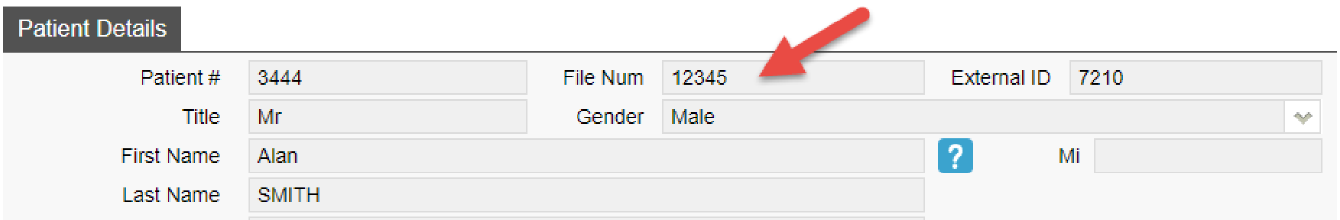
**Other:**

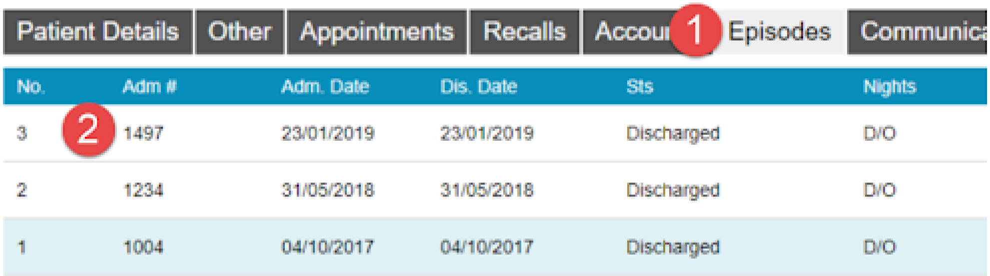



**File #:** The file number of the patient. Can be set in the **Patient Details.**

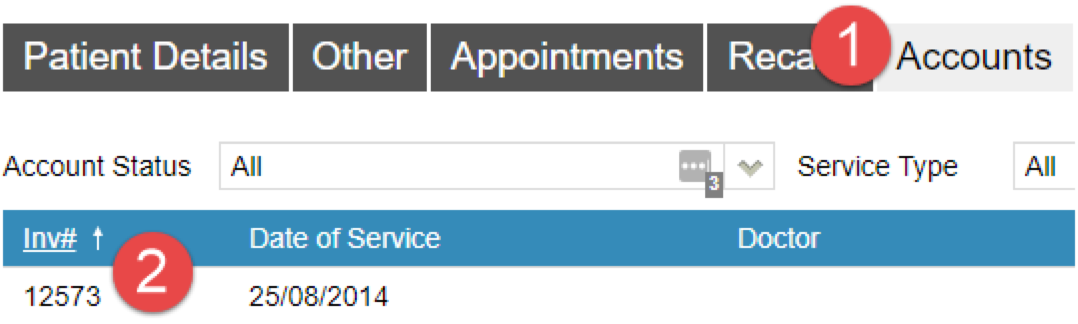



**Admission #:** Admission number for the patient (this is a number for patients that have Hospital episodes). Can be found in **Episodes,** from the **Patient Details** screen.

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.

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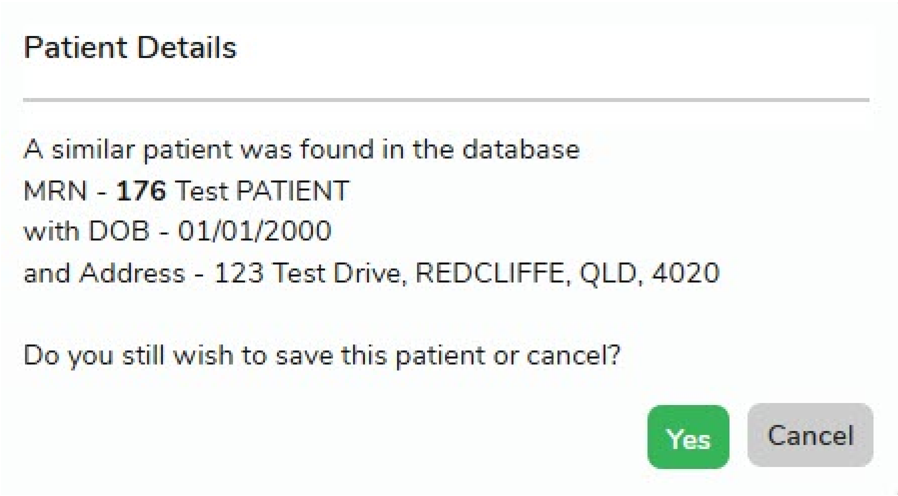
# Merging Duplicate Patients

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.

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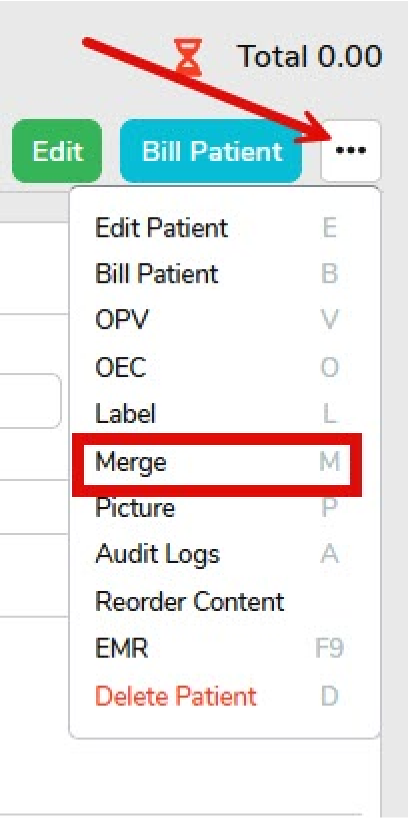
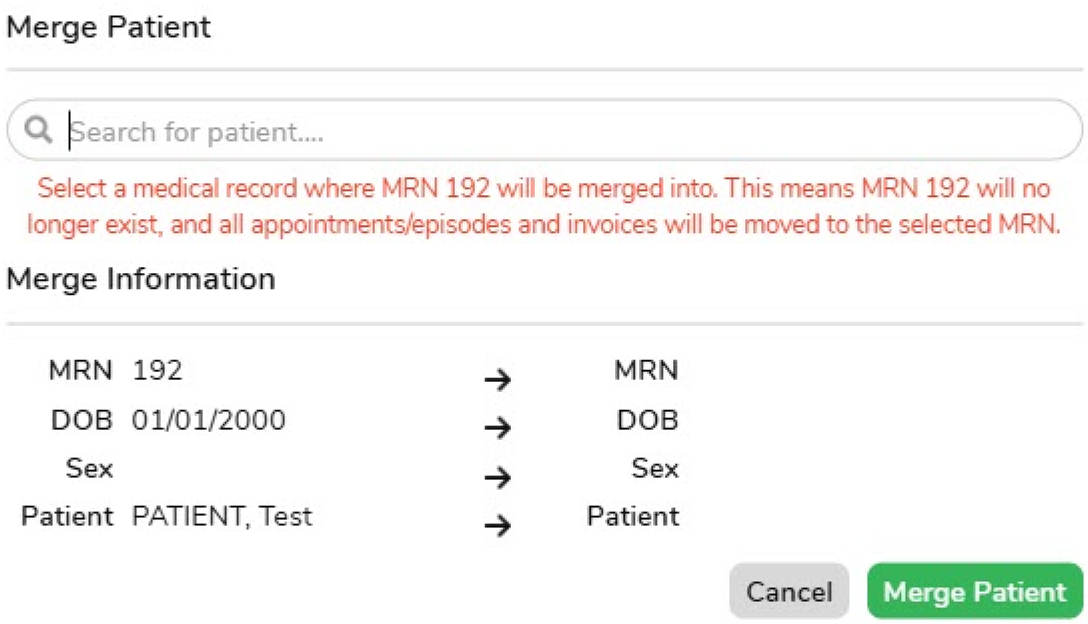
**How to Merge Patients**

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

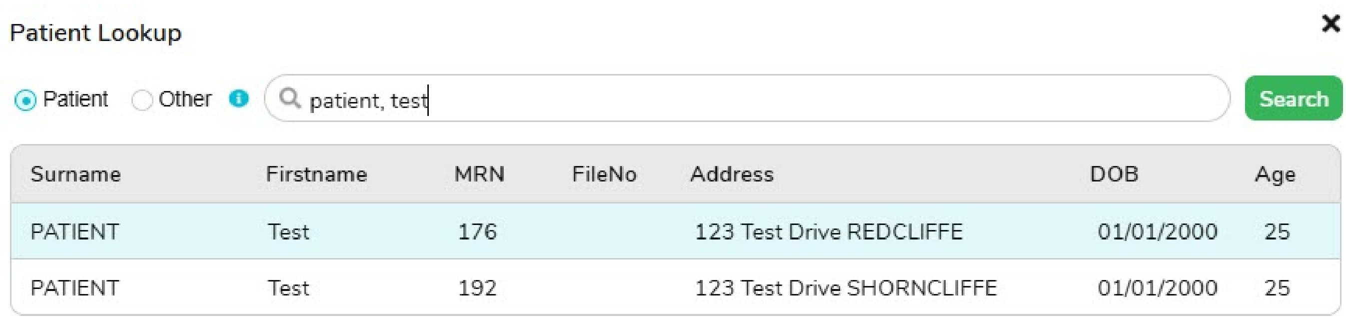
In the top right hand corner of the **Patient Details** screen you will see 3 dots which will display a drop-down menu with a Merge option.




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

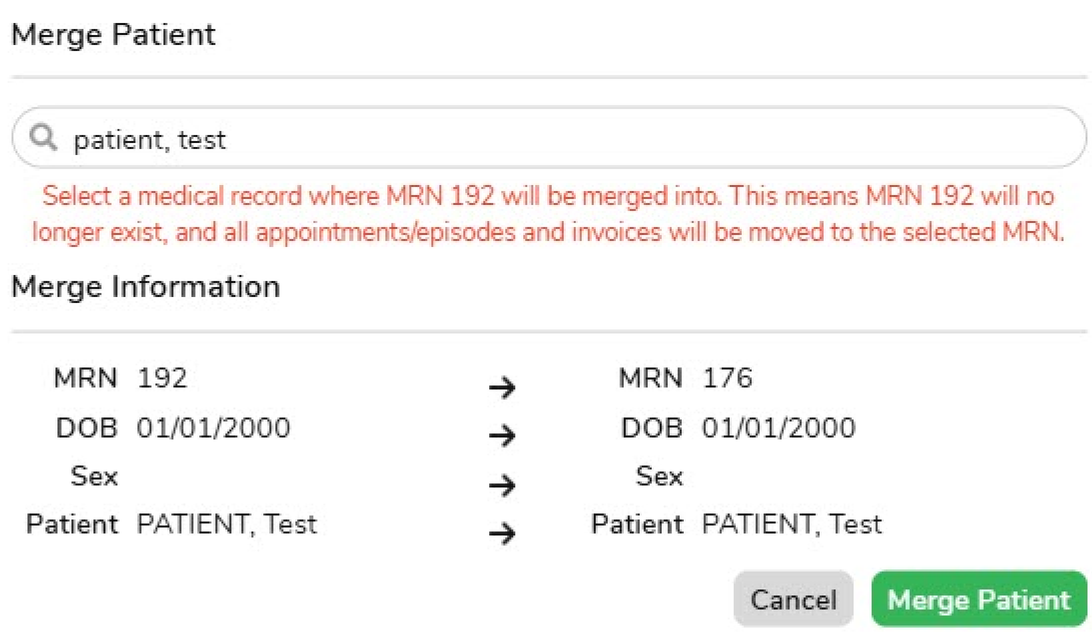



Simply search for the patient you wish to merge the current one with. You will see the **Patient Lookup** box, containing any patients found.



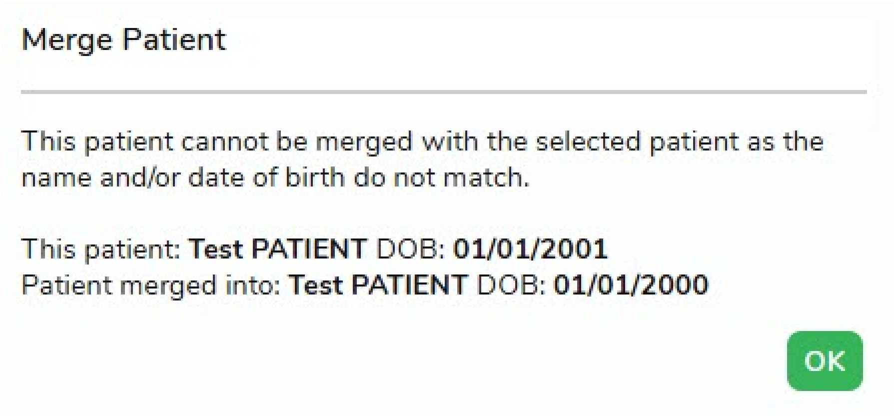

The **Patient Lookup** menu also has all the regular ways to search for a patient.

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




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.

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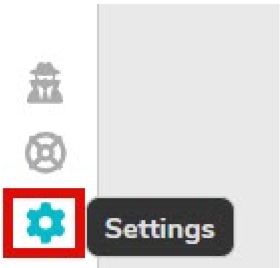
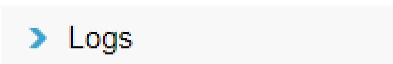
**The Audit Log**

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.

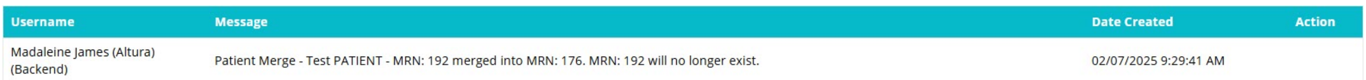
To access the **Audit Log,** first select **Settings**




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.