

## Hospital Appointment Screen Custom Views - Weekly View

**FYDO gives users the ability to customise the Appointments Screen to allow them to view the information that is important to their role. This assists in workflow & efficiency & allows users to view different information depending on the task that they are undertaking.**

All custom views that are created for each facility are available to all users. Each user is then able to select their favourite view to open as their default. These instructions will provide ideas for different views & the set up required to accomplish them. For further details on how to create custom views please see the page on [Creating Custom Views](#)

Included below are examples of **Weekly View** ideas. Please see our other pages on **Individual & All View** ideas for those view types.

## Administration View

[illegible]

APPOINTMENT > BOOKING VIEW

Edit

Edit View

LocationAll Locations

DepartmentAll Departments

Doctors/TheatresAll Doctors/Theatres

Select which fields you want to see in your hospital list

FieldsSelect Field

Add Field

Field Name	Percentage of column width
Time	20
Patient Name	60
Excess	20 X
	100

View NameAdministration Weekly

Layout☐ All ☐ Individual ☒ Weekly

Scroll type☐ Individual Scroll ☒ Unified Scroll

Hospital State Type☒ Appointment ☐ Status ☐ Booking Code 1 ☐ Booking Code 2

Administration - Weekly - Custom View Example Set Up

# Confirmed View

Search

NUMBER OF APPOINTMENTS 6 | TOTAL MINUTES 120 of 2500 Mins

ALL

INDIVIDUAL

WEEKLY

LIST

THEATRE 1

THEATRE 2

THEATRE 3

Confirmed - Weekly - Custom View Example

Mon 10/04			Tue 11/04			Wed 12/04			Thu 13/04			Fri 14/04		
Time	Name	C	Time	Name	C	Time	Name	C	Time	Name	C	Time	Name	C
08:00			08:00			08:00			08:00			08:00		
08:20			08:20			08:20			08:20			08:20		
08:40			08:40			08:40			08:40			08:40		
09:00			09:00			09:00	DAY, Doris	✓	09:00			09:00		
09:20			09:20			09:20	DEAN, James	✓	09:20			09:20		
09:40			09:40			09:40	STEWART, Alfred	✓	09:40			09:40		
10:00			10:00			10:00			10:00			10:00		
10:20			10:20			10:20			10:20			10:20		
10:40			10:40			10:40			10:40			10:40		
11:00			11:00			11:00			11:00			11:00		
11:20			11:20			11:20			11:20			11:20		
11:40			11:40			11:40			11:40			11:40		
12:00			12:00			12:00			12:00			12:00		
12:20			12:20			12:20			12:20			12:20		
12:40			12:40			12:40			12:40			12:40		
13:00			13:00			13:00	JACKSON, Michael	✓	13:00			13:00		
13:20			13:20			13:20	SMITH, John	✓	13:20			13:20		
13:40			13:40			13:40	HAYNES, Cornell		13:40			13:40		
14:00			14:00			14:00			14:00			14:00		
14:20			14:20			14:20			14:20			14:20		
14:40			14:40			14:40			14:40			14:40		
15:00			15:00			15:00			15:00			15:00		

APPOINTMENT > BOOKING VIEW

Edit View

Location

All Locations

Department

All Departments

Doctors/Theatres

All Doctors/Theatres

View Name

Confirmed Weekly

Layout

All

Individual

Weekly

Scroll type

Individual Scroll

Unified Scroll

Hospital State Type

Appointment

Status

Booking Code 1

Booking Code 2

Select which fields you want to see in your hospital list

Fields

Select Field

Add Field

Field Name	Percentage of column width
Time	25
Patient Name	55
Confirmed	20
	100

Confirmed - Weekly - Custom View Example Set Up

# Coding View

Search

NUMBER OF APPOINTMENTS 6 | TOTAL MINUTES 120 of 2500 Mins

ALL

INDIVIDUAL

WEEKLY

LIST

THEATRE 1

THEATRE 2

THEATRE 3

Coding - Weekly - Custom View Example

Mon 10/04			Tue 11/04			Wed 12/04			Thu 13/04			Fri 14/04		
Time	Name	C	Time	Name	C	Time	Name	C	Time	Name	C	Time	Name	C
08:00			08:00			08:00			08:00			08:00		
08:20			08:20			08:20			08:20			08:20		
08:40			08:40			08:40			08:40			08:40		
09:00			09:00			09:00	DAY, Doris	C	09:00			09:00		
09:20			09:20			09:20	DEAN, James		09:20			09:20		
09:40			09:40			09:40	STEWART, Alfred		09:40			09:40		
10:00			10:00			10:00			10:00			10:00		
10:20			10:20			10:20			10:20			10:20		
10:40			10:40			10:40			10:40			10:40		
11:00			11:00			11:00			11:00			11:00		
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11:40			11:40			11:40			11:40			11:40		
12:00			12:00			12:00			12:00			12:00		
12:20			12:20			12:20			12:20			12:20		
12:40			12:40			12:40			12:40			12:40		
13:00			13:00			13:00	JACKSON, Michael		13:00			13:00		
13:20			13:20			13:20	SMITH, John		13:20			13:20		
13:40			13:40			13:40	HAYNES, Cornell		13:40			13:40		
14:00			14:00			14:00			14:00			14:00		
14:20			14:20			14:20			14:20			14:20		
14:40			14:40			14:40			14:40			14:40		
15:00			15:00			15:00			15:00			15:00		

APPOINTMENT > BOOKING VIEW

Edit

Edit View

LocationAll Locations

DepartmentAll Departments

Doctors/TheatresAll Doctors/Theatres

Select which fields you want to see in your hospital list

FieldsSelect Field

Add Field

Field Name	Percentage of column width
Time	25
Patient Name	55
Coding Status	20
	100

View NameCoding View

LayoutAllIndividualWeekly

Scroll typeIndividual ScrollUnified Scroll

Hospital State TypeAppointmentStatusBooking Code 1Booking Code 2

Coding - Weekly - Custom View Example Set Up

## List Re-Ordering Feature (Session Priority)

FYDO allows users the ability to re-order lists with a fabulous feature that resembles the SimDay function **Session Priority**. This feature allows users to easily re-order patients', move all patients' appointments up at once (*in the case of a cancellation*) and set appointment times according to each appointment length.

This feature will work from the admission time of the **FIRST** patient on the list. It will then slot all other patients' into their corresponding admission times, according to the appointment lengths. The difference with using the List Re-Ordering feature is that it allows users to easily move a patients' appointment up or down the list **& will shuffle the other patients' admission times to accommodate**. Whereas other methods of moving appointments do not impact the admission times of any other patients.

Today

Jul 2024

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31

Locations

All Locations

Departments

All Departments

Doctors/Theatres

All Doctors/Theatres

Filter

All Appointments Inc Cancelled

Action

Walk Patient In

Find Available Appointment

Select an action

Send Bulk SMS

Print List

List Re-ordering

ADMISSIONS DAY PROGRAM THEATRE 1

Time	Name
08:00	
08:30	
09:00	
09:30	
09:30	<u>JOE, Blow</u>
09:30	<u>SPRATT, Jack</u>
09:30	<u>MUNRO, Marilyn</u>
10:00	
10:30	
11:00	<u>DEAN, James</u>
11:15	<u>BLACK, Isaac</u>
11:30	<u>STEWART, Alfred</u>
11:45	<u>HARD, Work</u>
12:00	<u>JACKSON, Michael</u>
12:15	<u>HOLLY, Charles</u>
12:30	<u>HAYNES, Cornell</u>
12:45	<u>BRANSON, Richard</u>
13:00	<u>BOND, Mary</u>
13:15	
13:30	<u>DUMPTY, Humpty</u>
13:45	<u>SAYS, Simon</u>
14:25	
14:30	
15:00	

To utilise this function, navigate to the **Appointments Screen** and locate the list that you wish to change.

Select an appointment in the required session & use the **Select an Action** dropdown & click on **List Re-Ordering**.

This will display a pop-up box that allows you to drag patients up or down the list.

List Re-Ordering

Patient Name	Procedure
BLACK, Isaac	Gastroscopy
HARD, Work	Colonoscopy
JACKSON, Michael	Colonoscopy & Gastroscopy
HOLLY, Charles	Gastroscopy
HAYNES, Cornell	Colonoscopy
BRANSON, Richard	Colonoscopy & Gastroscopy
BOND, Mary	Colonoscopy & Gastroscopy
SAYS, Simon	Colonoscopy & Gastroscopy

OK

Cancel

If you do not wish to change the order of the list, and only wish to move all patients up after a cancellation, then simply open the pop-up box & click OK. This will move all patient's appointment times up the list.

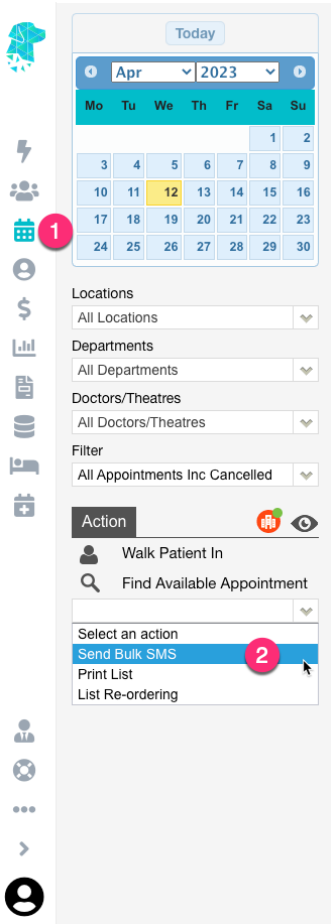
You will notice in the below video that we used the Procedure to sort the patients & once we clicked ok FYDO also filled in the gaps that were left from cancelled appointments.

[https://wiki.fydo.cloud/wp-content/uploads/2023/05/2023-05-01\\_15-09-26.mp4](https://wiki.fydo.cloud/wp-content/uploads/2023/05/2023-05-01_15-09-26.mp4)

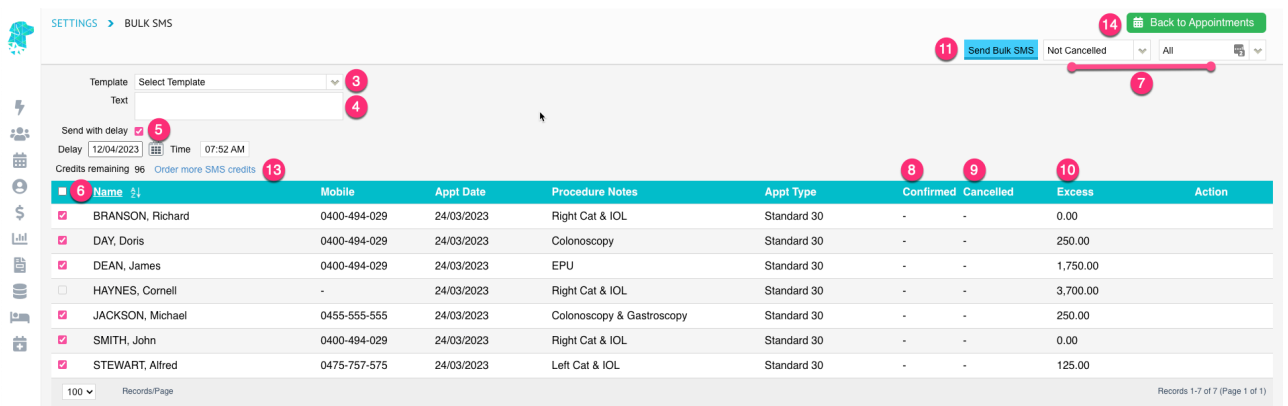
## [Sending Bulk SMSs](#)

**FYDO allows you to contact patients via SMS to assist in efficient workflow. These can be sent one at a time or to a whole list of patients. The system gives the ability to pre-populate the SMS with information regarding the admission/episode e.g., date of admission, time of admission, health fund excess amount etc**

Use these instructions if you would like to send a Bulk SMS to a **number of patients at once:**



1. Open the Appointments Screen & navigate to the required date & theatre
2. Use **Select an action** dropdown on the left of the screen to select **Send Bulk SMS**






3. Use the **Template** dropdown box to select from the preloaded SMS templates in your system  
(For help with customising these contact Altura Health or visit <https://wiki.fydo.cloud/sms-templates/>)
4. Or free type in the **Text** box to customise the text message
5. The **Send with delay** tick box allows the text to be scheduled for a later date & time. If this feature is being utilised enter the **Date & Time** that the text will be scheduled to send. However, there is no need to use this feature if the text is intended to be sent in real time
6. All patients with a valid mobile phone number will be selected by default. Use the **tick box** at the top of the column to easily select or de-select all patients' at once. Or use the tick box for each patient to individually select or de-select
7. Use the **drop-down boxes** in the top right to assist in filtering to the desired patient demographics
8. **Confirmed** gives information regarding previous SMSs sent. To assist in determining if they

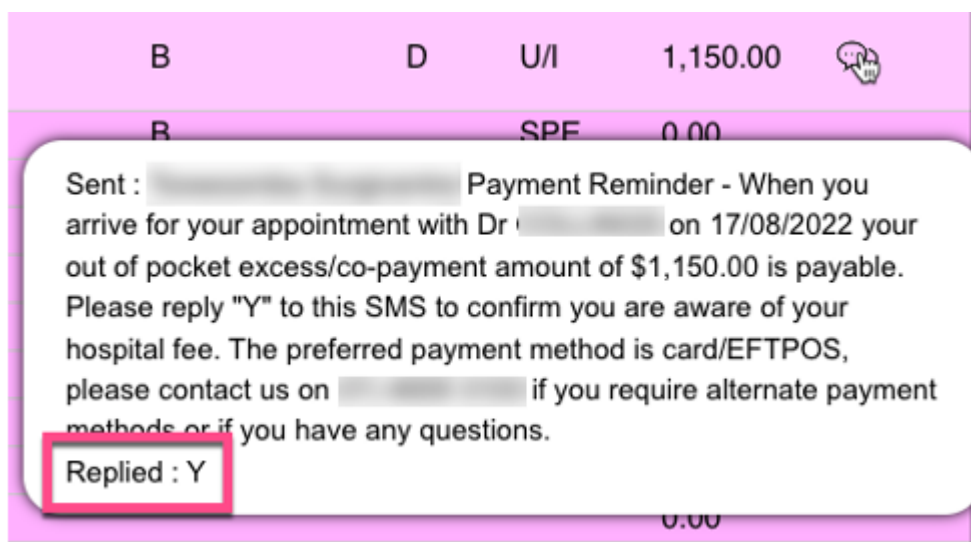
still require an SMS

9. **Cancelled** gives information regarding the patients' cancelled status. However, the screen opens to show **Not Cancelled** patients' only. This column is only relevant if the filter has been set to include the cancelled patients', using the drop-down boxes in #13
10. The **Excess** column displays the amount that has been entered into the Excess field of the patients episode
11. Once all relevant information has been completed, & all desired patients' have been selected, click **Send Bulk SMS**
12. You will be asked to confirm that you wish to send the SMS, click **Yes**
13. The **Credits Remaining** on the account are displayed on the screen & once the credits get low use the **Order more SMS credits** option on this screen to be re-directed to the **Order SMS Credits** screen where you can follow the prompts
14. **Back to Appointments** button returns the user to the appointments screen

Once the patient has been sent an SMS there will be a visual cue on the Appointments screen. The icon will change depending on the status of the SMS sent. The icons represent the following:

-  This icon will display once the SMS has been **sent** but not yet delivered to the recipient
-  This icon will display once the SMS has been **delivered**
-  This icon will display once the recipient has **replied**

Hover over each of these icons, in the appointments screen, to display the information that the SMS contained. Once a reply has been received it will also be displayed below the message.



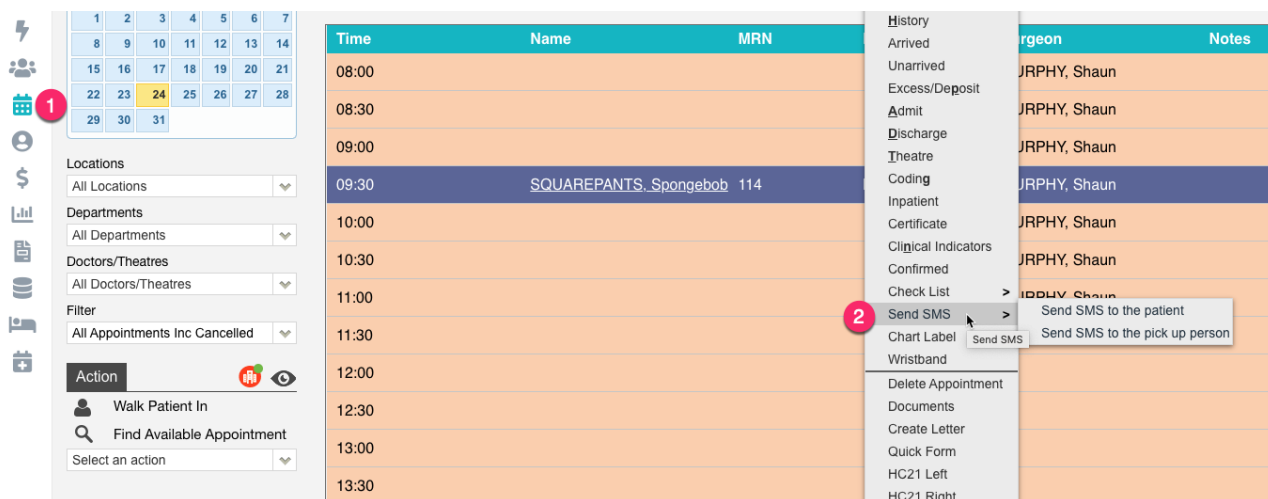
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## [Sending Individual SMSs \(Hospital\)](#)

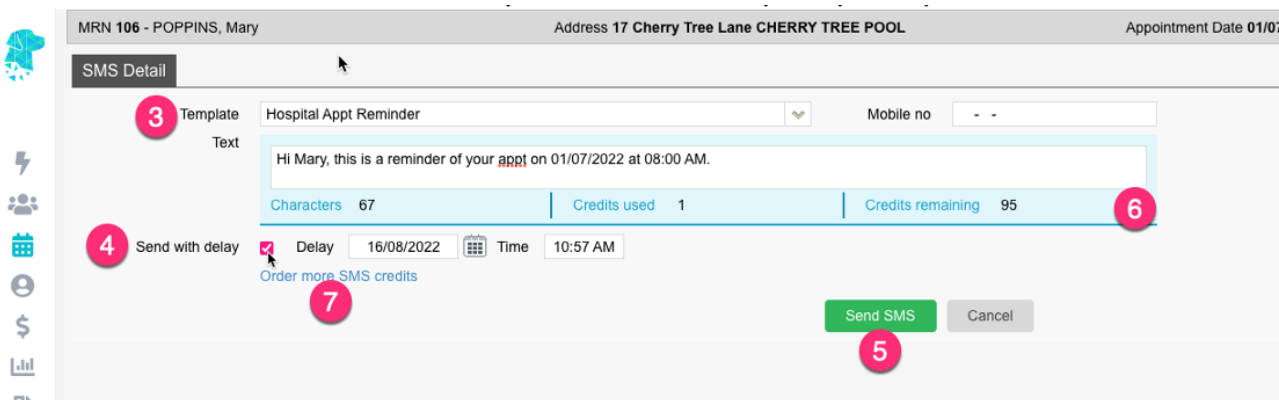
FYDO allows you to contact patients, and their pick up person, via SMS to assist in efficient workflow. These can be sent one at a time or to a whole list of patients. The system gives the ability to pre-populate the SMS with information regarding the admission/episode e.g., date of admission, time of admission, health fund excess amount etc

Use these instructions if you would like to send an SMS to an **Individual Patient** or to the patients **Pick Up Person**:

1. Navigate to the **Appointments Screen** & locate the required episode



2. Right-Click on the required episode & hover over **Send SMS** to show the 2 options to either **Send SMS to the Patient** or **Send SMS to the pick up Person** (Or use the shortcut key "S" after you have selected the required patient to send SMS to the patient)






3. Select the required **Template** or free type desired message in the **Text** box
4. Use the **Send with delay** tick box if the message is required to be sent at a specified time, as opposed to at the current time. If you are wanting to use this option, select the **Date & Time** that the message is to be sent
5. Once all details have been checked click **Send SMS**
6. The information included in Blue explains:
  - a. Characters** - The current length of the text message. Each individual text message is allowed to be 160 characters long. Once the length exceeds this amount, it will require more credits to be sent
  - b. Credits** - This shows the number of credits that will be used to send the message, depending on the length of the text
  - c. Credits remaining** - Shows how many credits are remaining on your FYDO account
7. Once the credits get low use the **Order more SMS credits** option on this screen to be re-

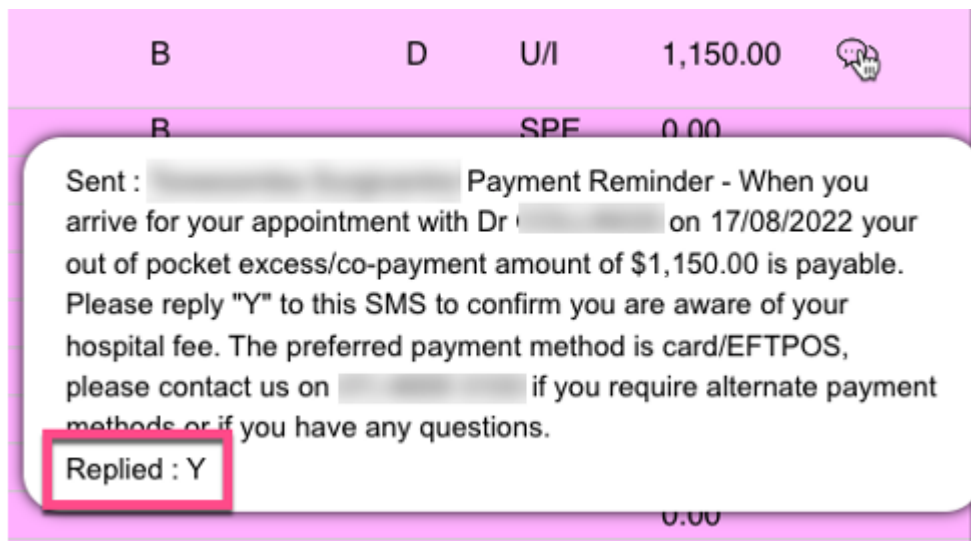


directed to the **Order SMS Credits** screen where you can follow the prompts to purchase more credits

Once the patient has been sent an SMS there will be a visual cue on the Appointments screen. The icon will change depending on the status of the SMS sent. The icons represent the following:


-  SMS has been **sent** but not yet delivered to the recipient
-  SMS has been **delivered** to the recipient
-  Recipient has **replied** to the SMS

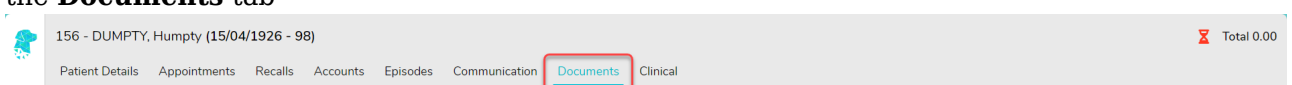
Hover over each of these icons, in the appointments screen, to display the information that the SMS contained. Once a reply has been received it will also be displayed below the message.



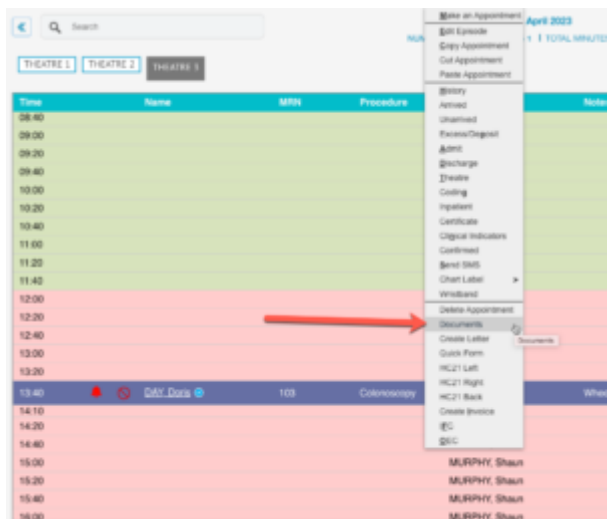
## [Emailing Documents from FYDO](#)

**FYDO facilitates emailing of documents, that are stored in the Documents tab, to the patients, doctors & referring doctors.**

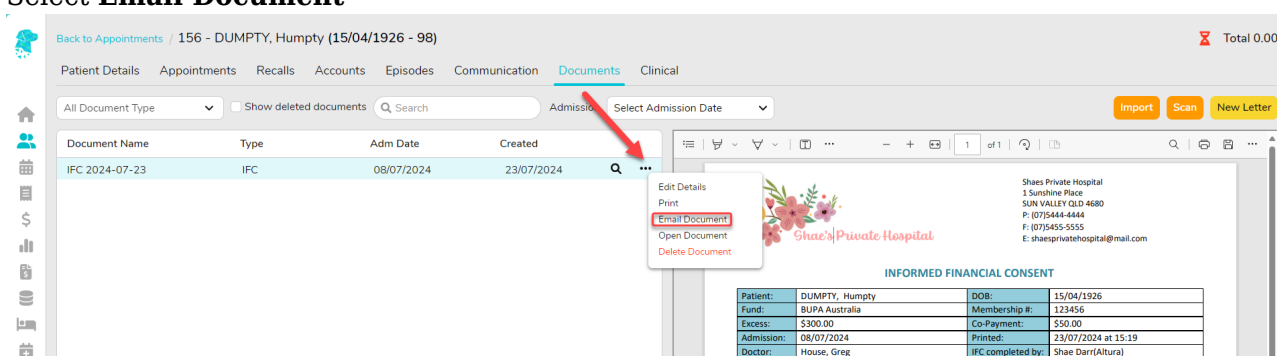
1. Navigate to the required patient, in the Patients  tab, and once the details are open select the **Documents** tab



2. Alternatively, locate the required episode and use the **Right Click** menu to select **Documents**



3. Select the document that you wish to email & use the three black dots, on the right of the document, to display the menu options
4. Select **Email Document**



5. The **Email Document** pop up box will be displayed & allow the user to choose who they want to email

### Email Document

☐ Patient Email
 ☐ Referring Doctor Email
 ☐ Doctor Email

Discard
Send Email

- **Patient Email** allows emails to be sent to the patient. The email address is automatically populated, from the Patient Screen, if it is entered
- **Referring Doctor Email** allows emails to be sent to the referring doctor. The email address will automatically populate if the document is linked to a particular admission, that admission has a referring doctor listed & the referring doctor has an email address added in FYDO. *(Referring Doctors emails can be added in **Settings > Referring Doctors**)*
- **Doctor Email** allows emails to be sent to the admitting doctor. The email address will automatically populate if the document is linked to a particular admission & the doctor has an email address added in FYDO. *(Doctors emails can be added in **Settings > Doctors**)*

*If no email address is on file, for any of the above options, the user can add the email manually into the relevant field*

6. Select who will be receiving the document via email by ticking the box to the left of their description
7. Check the email address listed is correct, or manually type the email address
8. Subject line will automatically populate however users are able to make changes if required
9. Body of the email will automatically populate however users are able to make changes if required
10. Once all fields have been complete, select **Send Email**
11. A log of all emails sent can be found in the **Communication** tab, along with all SMS history

Event	Type	Date	To	Message Body	Status	View
Send	Email	20/10/2020	doris@calamijane.com.au	Document 0000000126.pdf sent to doris@calamijane.com.au	Sent	View
Send	Email	20/10/2020	doris@calamijane.com.au	Document 0000000126.pdf sent to doris@calamijane.com.au	Sent	View
Send	Email	20/10/2020	doris@calamijane.com.au	Document 0000000126.pdf sent to doris@calamijane.com.au	Sent	View
Send	Email	20/10/2020	doris@calamijane.com.au	Document 0000000126.pdf sent to doris@calamijane.com.au	Sent	View

## [Creating Custom Hospital Views in the Appointments Screen](#)

The Appointments Screen in FYDO is completely customisable. Creating different views will assist in workflow & efficiency & allow different staff members to view information that is relevant to them.

The views that are created are available to all users on the database & each user can choose their own favourite default view by selecting the heart next to their chosen view.

Users are able to have a favourite custom view for each view type, eg. a favourite "Individual" view, a favourite "All" view & a favourite "Weekly" view.

1. Custom views are created in the **Appointments Screen**
2. Hover over the eye icon & select **Add New View**

3. Select the **Location, Department & Doctors/Theatres** that you want the view to be available for. Or leave with **All** selected for the view to be available all the time
4. Add the **View Name** to identify the view that you are creating. E.g., Theatre, Recovery etc
5. Choose the **Layout** in which you would like the view to open. E.g., Individual theatres, all theatres or weekly view
6. Select the **Scroll type** based on how you would like to view the screen when you scroll.
  - Individual Scroll**- You will be required to hover over the theatre in which you would like to scroll up or down.
  - Unified Scroll**- This allows you to scroll anywhere on the page and all the theatres will scroll together
7. Select the **Hospital State Type**. You have the option to set the appointments to display by:
  - **Appointment Type**- This will colour code the bookings as per the Appointment Type in the booking
  - **Status**- Will colour code the bookings according to where they are in the facility
  - **Booking Code 1**- will colour code the appointments according to the booking code 1 that has been entered
  - **Booking Code 2**- will colour code the appointments according to the booking code 2 that has been entered

APPOINTMENT > BOOKING VIEW Save Cancel

Create View

3 Location All Locations  
 Department All Departments  
 Doctors/Theatres All Doctors/Theatres

4 View Name  
 5 Layout All Individual Weekly Number of Columns 5  
 6 Scroll type Individual Scroll Unified Scroll  
 7 Hospital State Type Appointment Status Booking Code 1 Booking Code 2

Select which fields you want to see in your hospital list

Fields Select Field Add Field

Field Name	Percentage of column width
Time	25
Patient Name	75
	100

Order of Doctors/Theatres

Name	
Theatre 1	Shaes Private Hospital X
Theatre 2	Shaes Private Hospital X
Theatre 3	Shaes Private Hospital X

Save Cancel

8. Use the **Fields** dropdown to select the type of information that will be added to the custom view
9. Click **Add Field** to add the selected field to the table below
10. Use the on the left of each line to sort fields into the required order
11. Use the **Percentage of column width** fields to determine the width of each column  
 N.B. the total of these columns always has to add up to 100.

Select which fields you want to see in your hospital list 9

Fields 8 Add Field

Field Name	Percentage of column width	
Time	10	
Patient Name	22	
Alert (Icon)	5	X
Allergy (Icon)	5	X
Proc Notes	25	X
Excess	8	X
IFC Completed	5	X
Anaesthetist	10	X
Surgeon Name	10	X
<span>10</span>	100	<span>11</span>

12. Click **Save** and the appointment screen, with the new custom view that was created, will be displayed.

Some examples of helpful views are:

#### Administration View

<<

Search

Monday, 6 March 2023

ALL

INDIVIDUAL

WEEKLY

LIST

NUMBER OF APPOINTMENTS 4 | TOTAL MINUTES 120 of 570 Mins

THEATRE 1

THEATRE 2

THEATRE 3

Time	Name	HF	OEC	OEC	Excess	Co-pay	IFC	PCR
08:00					0.00	0.00		
08:30					0.00	0.00		
09:00	DEAN, James	BUP	✓	✓	250.00	50.00	✓	✓
09:30	MUNRO, Marilyn	MPL	✓		500.00	0.00		
10:00	STEWART, Alfred	AUH			0.00	0.00		
10:30	HAYNES, Cornell	U/I	✓	✓	1,540.00	0.00		✓
11:00					0.00	0.00		
11:30					0.00	0.00		

Theatre View

<<

Search

Monday, 6 March 2023

ALL

INDIVIDUAL

WEEKLY

LIST

NUMBER OF APPOINTMENTS 4 | TOTAL MINUTES 120 of 570 Mins

THEATRE 1

THEATRE 2

THEATRE 3

Time	Name	PTIT	Procedure	Surgeon	Anaesthetist	Anaesthetic (1)
08:00				MURPHY, Shaun	Starr, Ringo	
08:30				MURPHY, Shaun	Starr, Ringo	
09:00	DEAN, James	10:00	Colonoscopy	MURPHY, Shaun	Starr, Ringo	General
09:30	MUNRO, Marilyn	10:20	Colonoscopy	MURPHY, Shaun	Starr, Ringo	General
10:00	STEWART, Alfred	10:45	Right Cat & IOL	MURPHY, Shaun	Starr, Ringo	IV/Sedation
10:30	HAYNES, Cornell	11:50	Right Knee Arthroscopy	MURPHY, Shaun	Starr, Ringo	General
11:00				MURPHY, Shaun	Starr, Ringo	
11:30				MURPHY, Shaun	Starr, Ringo	

Recovery View

<<

Search

Monday, 6 March 2023

ALL

INDIVIDUAL

WEEKLY

LIST

NUMBER OF APPOINTMENTS 4 | TOTAL MINUTES 120 of 570 Mins

THEATRE 1

THEATRE 2

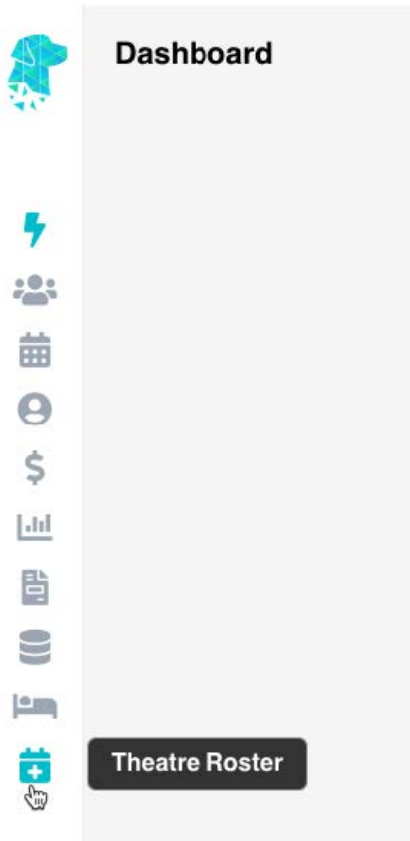
THEATRE 3

Time	Name	Alert (Text)	Allergy (Text)	Procedure	Dr	Anaesthetic (1)	Food
08:00					MS		
08:30					MS		
09:00	DEAN, James	Diabetic		Colonoscopy	MS	General	Gluten Free
09:30	MUNRO, Marilyn			Colonoscopy	MS	General	
10:00	STEWART, Alfred	NIDDM	Morphine & Codeine	Right Cat & IOL	MS	IV/Sedation	Nut Allergy
10:30	HAYNES, Cornell	Walking stick	Penicillin	Right Knee Arthroscopy	MS	General	
11:00					MS		
11:30					MS		
12:00					MS		
12:30					MS		

Theatre Roster

Creating Theatre Sessions

Select **Theatre Roster** from the left-hand menu



1. Select the way you would like to view the roster:
  - a. By **Day**
  - b. By **Week**
  - c. By **Month**
2. Navigate to the date that you require using the **Next** and **Previous** arrows, **Calendar** or **Today**
3. Utilise the **Filter** to customise the information on the screen  
**Print** allows for a screenshot of the current view to be converted to PDF for printing purposes
4. Find the correct theatre & **Right-Click** to expand the options menu
5. Select **Make Booking**

6. Select the required **Doctor/Surgeon** and **Anaesthetist**

7. Ensure correct **Week Starting Date** and **Session Times** are selected
8. **Notes** and **Appointment Notes** can be added to the booking if required
9. The **Repeat** feature gives the ability to produce a reoccurring booking for the selected surgeon
  - a. Use the **Every \_\_\_\_ week** option to enable weekly, fortnightly, monthly bookings etc.
  - b. Use the tick boxes to select the days of the week you require the booking to reoccur
10. Use the **Ends** field to set the date that the reoccurring booking will cease. *NB. This feature will produce an **individual booking** on each of the selected days for that surgeon. If this booking changes, each individual booking will need to be amended. Hence, it is not recommended to reproduce the booking for extended periods of time*
11. Add **Theatre Staff** (if your facility procedure requires)
12. Import **Files** that are related to the Theatre Booking
13. Click **Save**

This will create a theatre booking that can then be **Edited**, **Cancelled** or **Deleted** with a right-click (as per #4 in the above image).

There is a detailed **Audit trail** of changes made located inside the booking (right-click & Edit Roster)

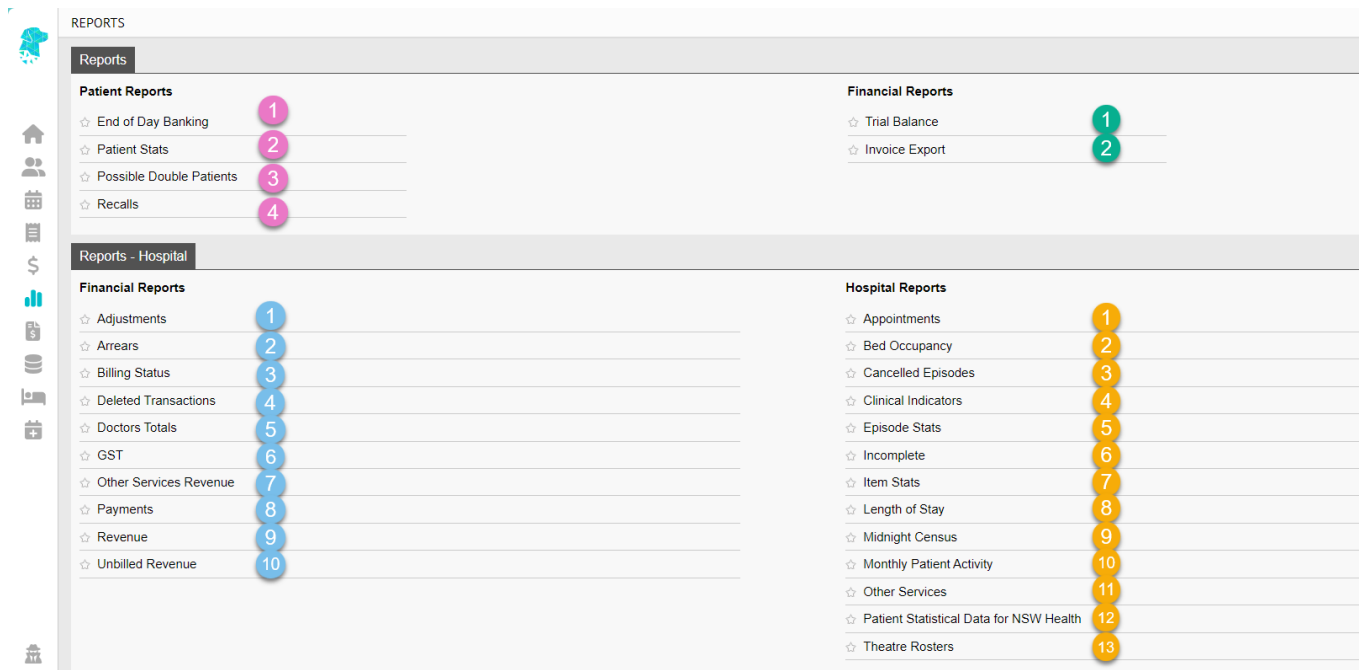
## **FYDO Hospital Reports**

This document gives a description of all FYDO reports & information obtainable from them. Reports can all be printed directly from FYDO or exported to PDF, Excel Spreadsheet or Raw Data (which is the most detailed option in collating data).

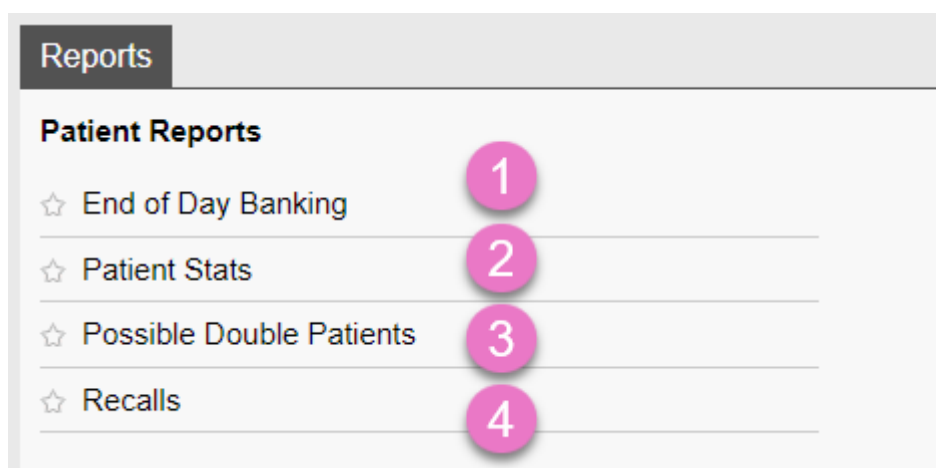
**Reports** also gives the option to **Star** ☐ your favourite reports. The reports that you have identified as your favourite, by clicking the star next to them, will be available on a Quick Menu that opens when you simply hover over the Reports tab in the main menu.

**For the full list of reports the user will need to click once on the Reports icon.**





## Patient Reports



1. **End of Day Banking** - Gives the ability to re-print any End of Day Banking Reports that have been previously completed. *NB. To initially perform the End of Day Banking for the day go to Settings, End of Day Banking.* Users are also able to reset the banking from this report, if they have made an error when initially processing the End of Day Banking.
2. **Patient Stats** - Gives the ability to obtain extensive patient demographics data. Including:
  - a. Medicare Eligibility Status
  - b. Deceased Patients
  - c. Archived Patients
  - d. DVA Patients
  - e. Indigenous Status
  - f. Referral Expired
  - g. Preferred Doctor
  - h. Health Fund
  - i. Gender
  - j. Surveys
  - k. Ability to stipulate birth date range
  - l. Ability to stipulate created range
  - m. Ability to stipulate post code range

3. **Possible Double Patients** - Provides a list of all patients that share similar information. There are several options to base the report on, enabling easy identification of patients that have been entered into FYDO more than once.
4. **Recalls** - Gives the ability to send bulk recalls to patients. Options to sort by recall date, gender, postcode etc. are all available.

## Financial Reports

Financial Reports	
☆ Trial Balance	1
☆ Invoice Export	2

1. **Trial Balance** - Shows a snapshot of the balances of all categories listed in FYDO for the date range selected.
2. **Invoice Export** - Enables an Excel spreadsheet to be created of all invoices raised for the selected date range and data type.

## Hospital - Financial Reports

Reports - Hospital	
Financial Reports	
☆ Adjustments	1
☆ Arrears	2
☆ Billing Status	3
☆ Deleted Transactions	4
☆ Doctors Totals	5
☆ GST	6
☆ Other Services Revenue	7
☆ Payments	8
☆ Revenue	9
☆ Unbilled Revenue	10

1. **Adjustments** - Shows a list of adjustments. Can be sorted by adjustment type, doctor & date range.
2. **Arrears** - Shows all invoices without a zero-dollar balance. It can be run by Doctor, Fund & Period that the account has been outstanding for (e.g., 30 days & over). It can be run as:
  - a. **Detail** - Showing every patient & the balance
  - b. **Summary** - Showing each health fund & the balance

- c. **Interactive** – Enabling follow up dates & notes to be accessible, to facilitate efficient workflow in debt recovery
  - d. **Minimum Balance** – Allowing for a dollar value to be entered & report run to show accounts over that dollar value. (*Handy to exclude accounts with credits from the report*)
  - e. **Show accounts requiring a refund only** – Enables the ability to see only the accounts that are in credit, once they have been invoiced, & require a possible refund
3. **Billing Status** – Details information on all episodes billed & unbilled. Reports can be run by doctor & date range & can be filtered to show:
- a. **Show all - inv summary** – Lists all patients that have been invoiced with a summary of charges
  - b. **Show all - inv detail** – Lists all patients that have been invoiced, documenting each line of the invoiced charges separately
  - c. **Show not billed only** – Is an interactive report that lists all episodes that have not been billed and allows the user to raise the invoice right from this screen! Showing details of the coding status & theatre complete status to assist with efficient workflow. Also providing a column for the Cancelled reason for users to decide if a charge needs to be raised for the episode. When ‘Show not billed only’ is selected, the user is given another option to **Don’t show patients’ billed \$0** if that is required, and to **Exclude cancelled episodes** if they wish to.
  - d. **Not billed in same period** – Shows invoices billed in the following accounting period
4. **Deleted Transaction** – Lists any transaction that has been deleted/voided from the selected period. Dates can be selected for deleted dates, accounting period or date of service.
5. **Doctors Totals** – gives a detailed view of revenue generated by each doctor. There is the ability to filter by doctor, or if all doctors are selected it will show a page per doctor. Clicking on the next page arrow > will show the next doctor in alphabetical order by surname.
6. **GST Report** – Allows users to obtain figures for GST on a Cash Basis or an Accrual Basis.
7. **Other Services Revenue** – Lists revenue from all other services that have been billed. E.g., prosthesis, surcharges etc. Report can be filtered by doctor, fund, theatre, type or patient category. Then there is the option to obtain data based on Accounting Period or Discharge Date for the date range selected.
8. **Payments** – Gives a list of all payments received in the selected date period either by Accounting Period, Audit Date or Date of Service. Filters are available by Doctor & payment type & data is able to be shown in formats such as Detailed, Summary, Audit date different to Accounting Period or Amount is negative.
9. **Revenue** – Retrieves revenue information by Accounting Period or Discharge Date. Can be displayed in Detail (shows revenue totals) or Summary (showing revenue generated by each category e.g., accommodation, theatre etc). Filters can be applied to show data for a particular doctor, fund, category, theatre etc. Information can then be grouped by various means also (Health fund, Indigenous Status, Postcode etc)
10. **Unbilled Revenue** – Generates a virtual invoice for all unbilled episodes, based on the item numbers entered in the theatre screen. Due to the nature of the information this report obtains, it can take a little longer to generate than other reports. It is designed to show all episodes that are not billing in real time. If the predicted item numbers are not entered in the Theatre Screen, at the time the report is run, it will be unable to calculate an accurate estimate of revenue for the episode. It will not look at dates that an invoice was billed if the “As at Date” is changed to a date prior to the current date, as it is designed to be a running tally.

## Hospital Reports

Hospital Reports	
☆ Appointments	1
☆ Bed Occupancy	2
☆ Cancelled Episodes	3
☆ Clinical Indicators	4
☆ Episode Stats	5
☆ Incomplete	6
☆ Item Stats	7
☆ Length of Stay	8
☆ Midnight Census	9
☆ Monthly Patient Activity	10
☆ Other Services	11
☆ Patient Statistical Data for NSW Health	12
☆ Theatre Rosters	13

1. **Appointments** – Gives a list of all bookings, including those that are yet to be admitted.
2. **Bed Occupancy** – Gives an overview of bed occupancy for the selected month. Also giving total number of beds, days, bed days available, bed days occupied & the percentage of occupancy.
3. **Cancelled Episodes** – Lists all episodes that have been cancelled with their corresponding reason. It can be filtered by Cancelled Reason to obtain more specific data for the date range selected. Cancelled Reasons can also be customised (Settings > Cancelled Reasons) to assist facilities in collating the data they require.
4. **Clinical Indicators** – Shows all indicators entered & the number that have been answered Yes or No during the date range selected. It can be filtered by Doctor or Theatre & is available in Summary & Detailed. Once the Detailed option is selected there are other fields that display, to ensure the exact information required is obtainable.
5. **Episode Stats** – Allows for an extremely broad range of information to be obtained. There is the option to show the data in a Detailed or Summary format & can filter by a range of options. The report can be generated by Admission Date or Discharge Date. Some examples of information that can be generated from this report, for the selected period, are:
  - a. **All episodes**
  - b. Episodes for a particular **Health Fund**
  - c. Episodes for a certain **Anaesthetist**
  - d. Episodes for a certain **Anaesthetic Type**
  - e. Episodes in a particular **Theatre**
  - f. Episodes for a particular **Specialty**
  - g. Episodes relating to a particular **Booking Code**

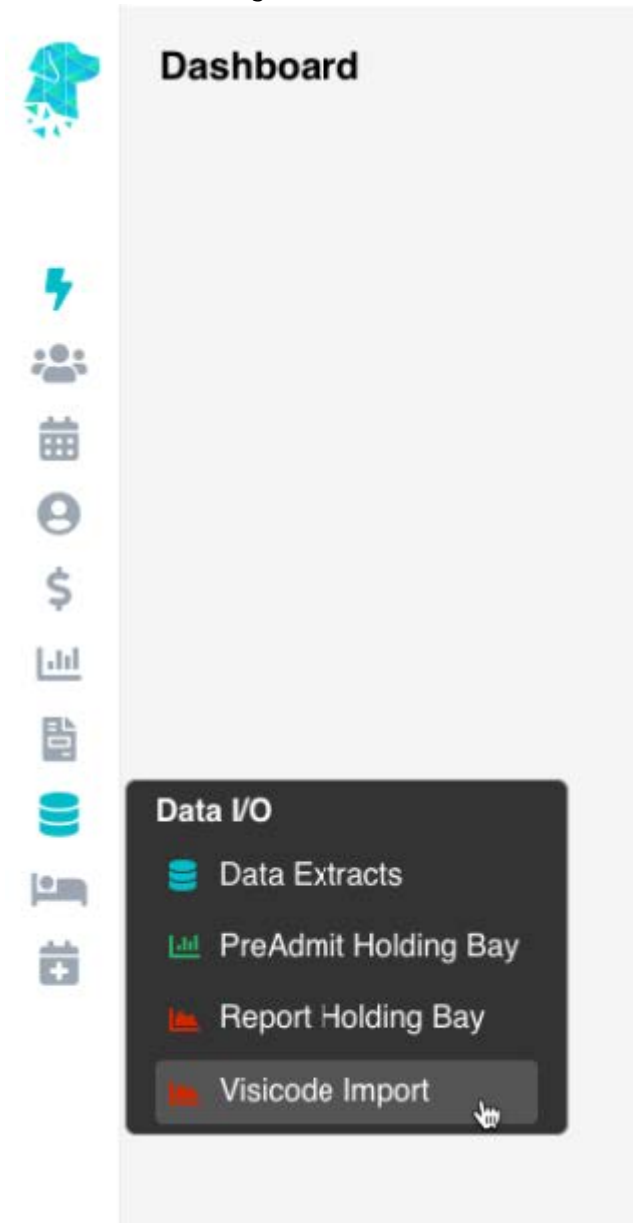
- h. Episodes for a particular **Sex**
  - i. **Indigenous Status** or **ATSI** demographic report
  - j. **Age Group** selection available
  - k. **Item numbers**
  - l. **Diagnosis codes**
  - m. **Procedure codes**
  - n. **DRG's**
  - o. **Referring Doctor**
6. **Incomplete** - Gives the option to show episodes, for a selected date range, that have not been coded, have not been discharged, have not had clinical indicators entered, have not been grouped etc. It also shows the Cancelled reason to enable the user to determine if the episode requires further attention. The **Uncoded Episodes** and **Ungrouped Episodes** reports are both Interactive, meaning the coder can easily and efficiently code all episodes from one screen!
7. **Item Stats** - Gives item number information for primary and subsequent procedures.
8. **Length of Stay** - gives statistical data regarding the time a patient spends in certain areas of the facility. It can be filtered by several different ways & is able to give the following data for the date range selected:
- a. **Pre-operative**
    - i. **Admission Time to Time in Theatre**
    - ii. **Booking Time to Time in Theatre**
    - iii. **Booking Time to Anaesthetic Start Time**
    - iv. **Pre-Op Time to Time in Theatre**
    - v. **Admission Time to Pre-Op Time**
    - vi. **Admission Time to Pre-Op time or Anaesthetic Start Time** *if pre-op time isn't entered*
  - b. **Intra-Operative**
    - i. **Time in Theatre to Time out of Theatre**
    - ii. **Procedure Start Time to Procedure Finish Time**
  - c. **Post-Operative**
    - i. **Time out of Theatre to Discharge Time**
  - d. **Total**
    - i. **Admission Time to Discharge Time**
    - ii. **Admission Time to Ready for Discharge**
    - iii. **Booking Time to Discharge Time**
    - iv. **Booking Time to Ready for Discharge**
  - e. **Comparison**
    - i. **Planned Time in Theatre with Actual Time in Theatre**
    - ii. **Booking Length with Actual Minutes in Theatre**
9. **Midnight Census** - will show patients that were admitted, but not yet discharged at the "As At" date selected.
10. **Monthly Patient Activity** - Gives an overview of all admissions, broken down into each day of the month. Giving the number of Total Patient Days, resulting in percentage averages for bed occupancy.
11. **Other Services** - Gives a list of all the other services that have been entered into the episodes. It can be filtered by suppliers for any given date range.
12. **Patient Statistical Data for NSW Health** - assists New South Wales hospitals with submitting their statistical data with ease.
13. **Theatre Rosters** - shows all booked theatre sessions & all cancelled theatre sessions grouped by surgeon or theatre. Also shows theatre utilisation minutes and percentages.

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# Importing Visicode Data

## After the data has been exported from Visicode

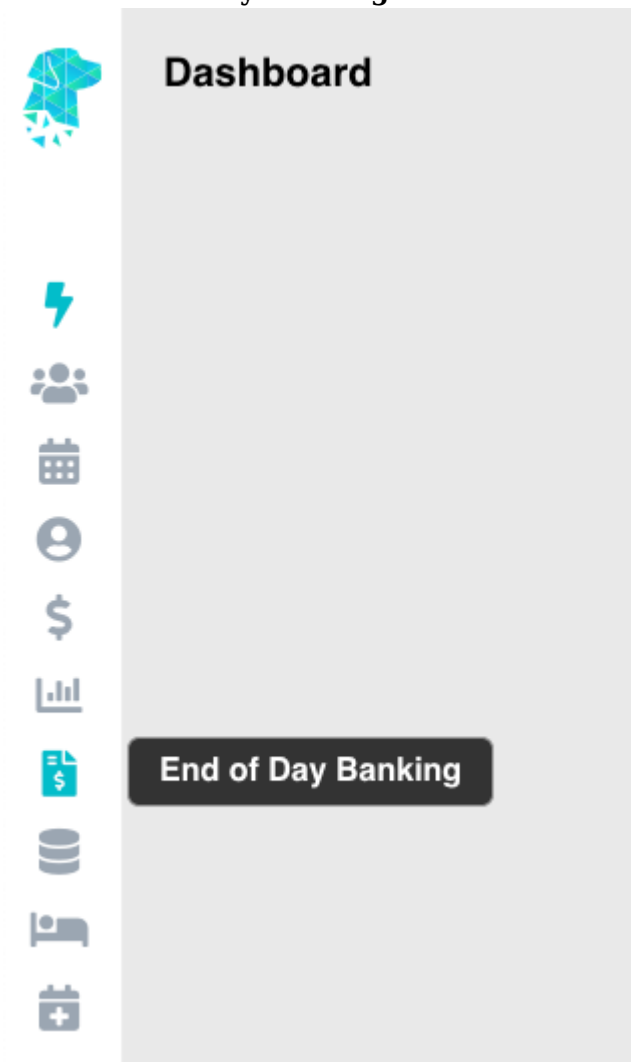
1. In the main menu go to **Data I/O** and select **Visicode Import**



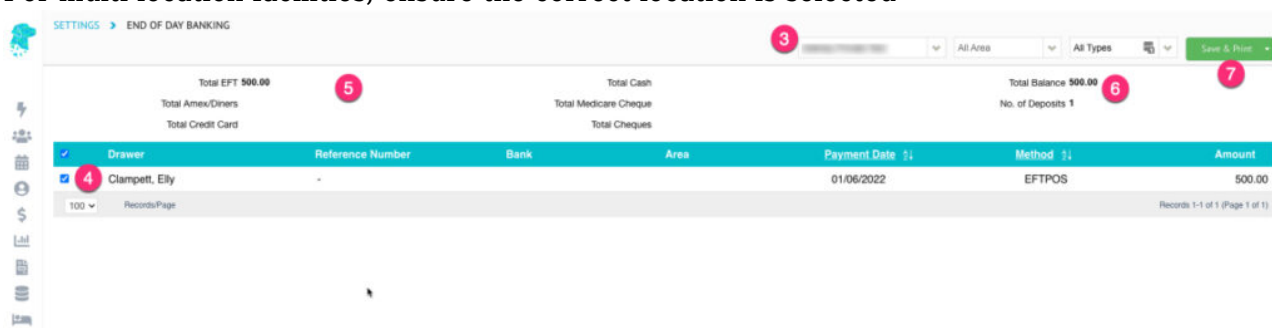
2. Select the **Location**
3. Click **Choose a file**
4. NB. File must be in a **.txt** format to be imported. Other file formats will not work
5. This will produce a list of all the patient information found in the file
6. Click **Import**
7. This will automatically update the **Coding** & run the **Grouper**
8. There will be an Excel spreadsheet download for information purposes. This file will show if any of the data imported was unsuccessful.

# End of Day Banking (Hospital)

1. Select **End of Day Banking** from the main menu



2. This will open the screen where the user can perform the End of Day Banking
3. For multi-location facilities, ensure the correct location is selected



4. Check each payment off as it is compared with corresponding data for accuracy
5. Ensure **Totals** match the EFTPOS settlement & cash/cheques taken
6. **Total Balance** of all revenue received will be shown
7. Click **Save & Print**
8. You will be prompted to confirm that you want to clear the transactions.
9. Once confirmed with **Yes** the **End of Day Banking Report** will be available for printing

## Re-Printing End of Day Banking Report

1. Select **Reports** from the main menu
2. Select **End of Day Banking**

REPORTS > END OF DAY BANKING

End of Day Banking

Location: Adeney Private Test (3)

Date: 01/06/2022 (4) Select Time

Reset

Last 50 bank deposits: Select one (5)

Update (6)

3. For multi-location facilities, ensure correct location is selected
4. Select the **Date & Time** for the required report **OR**
5. Select from the list of **Last 50 bank deposits**
6. Click **Update** and the selected report will be displayed on the screen
7. It can then be **Printed** or **Exported** using the corresponding blue buttons at the bottom right of the screen