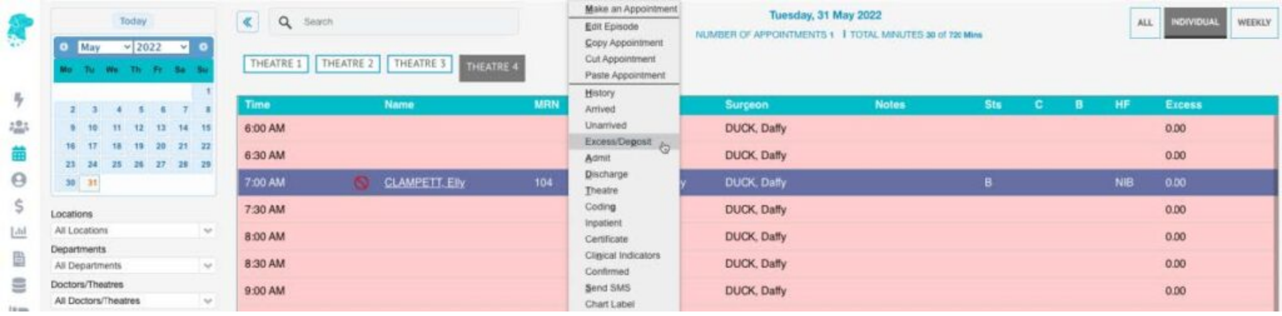
Receipt a Patient Payment (Hospital)

Receipting a patient payment on admission e.g., Excess payment, payment of account etc

1. Select required patient & **Right-Click** to expand menu
2. Select **Excess/Deposit**


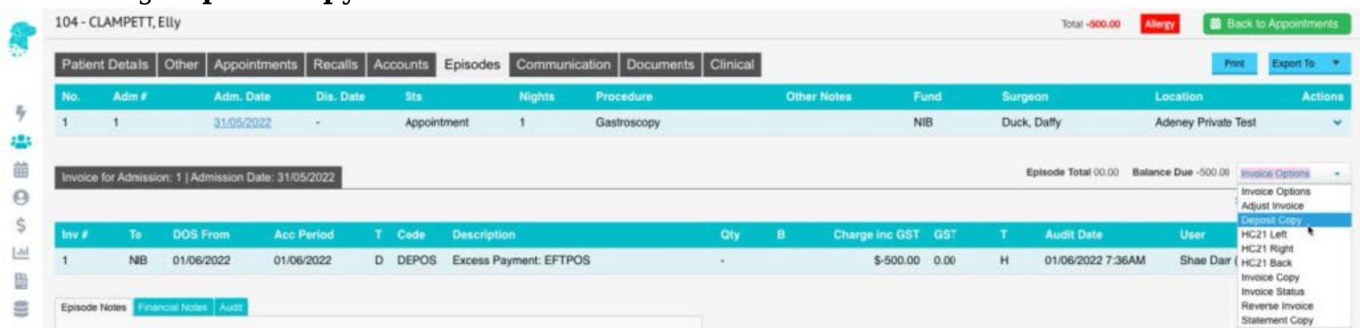
3. Complete required information
4. **Deposit type**
   a. **Fund Excess** for all excess payments or payments that are required to be applied to a health fund invoice
   b. **Patient Account Deposit** for all payments to go towards an uninsured invoice
5. **Transaction Date** will automatically populate with the current date
6. Select payment **Type** e.g., EFTPOS, Cash, Cheque etc
7. Enter the **Amount** that has been paid
8. Select the **Payment Description** relative to the payment being made. *NB. These descriptions are fully customisable & can be amended to suit the facility. This can be done in* ***Settings > Deposit Types***
9. Complete **Drawer, Reference, Bank & Branch** when payment is made via **Cheque**
10. Select **Save** or **Save & Print** to produce a printed copy of the receipt

Both Fund Excess & Patient Account Deposit receipts can be processes simultaneously to save the user following the above process twice.

These transactions can be found by selecting the required patient & using the **Right-Click** to display the menu and selecting **History**.

Select the required episode date from the list at the top of the screen.

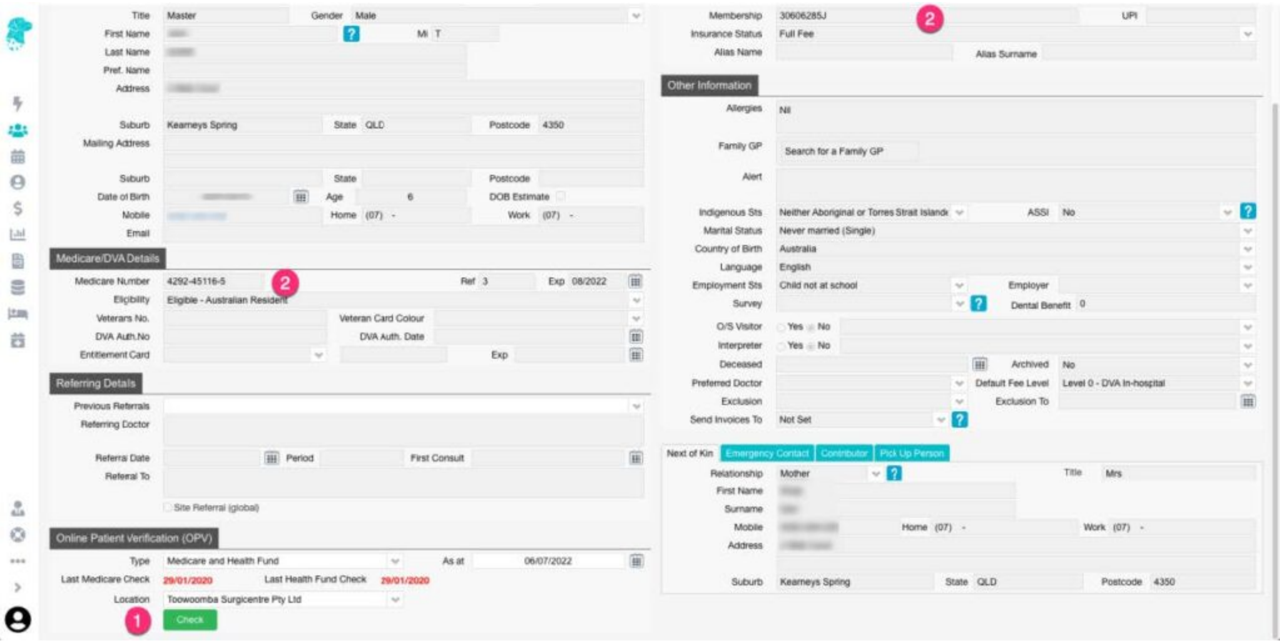
The receipt can then be re-printed by using the **Invoice Options** on the right of the **History** screen & selecting **Deposit Copy**.



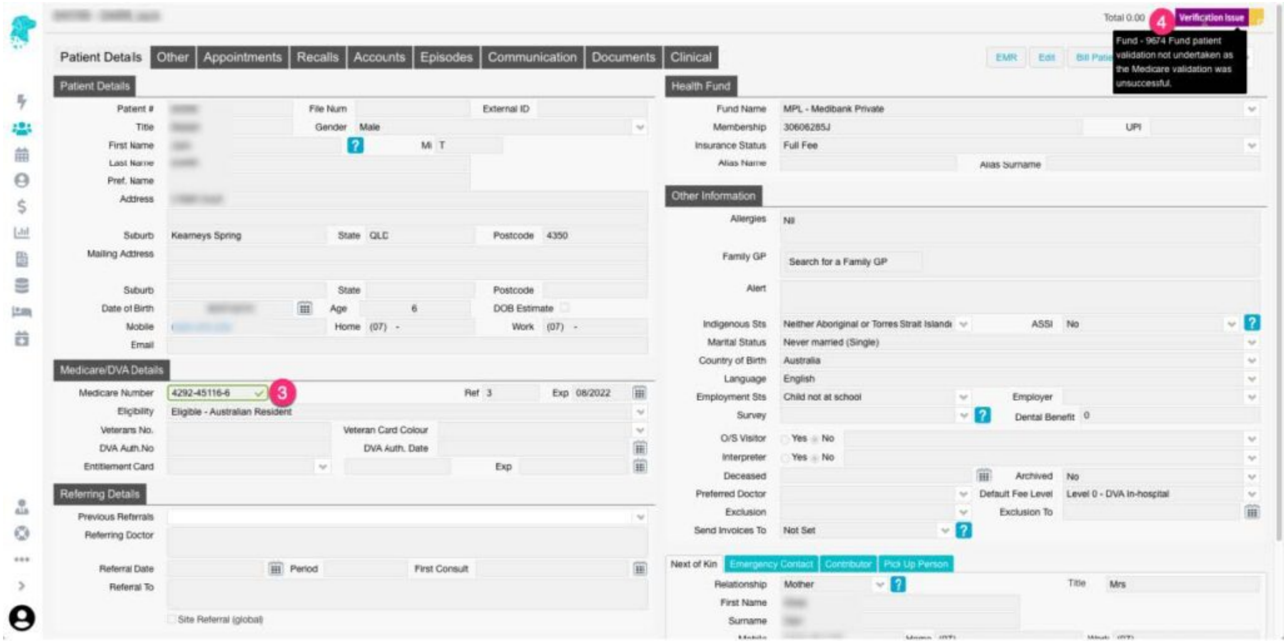
Online Patient Verification – OPV (Hospital)

Performing an Online Patient Verification check with Medicare & with the health fund helps to ensure the correct patient information is entered into the system & that the Online Eligibility Check (OEC) will be successfully transmitted

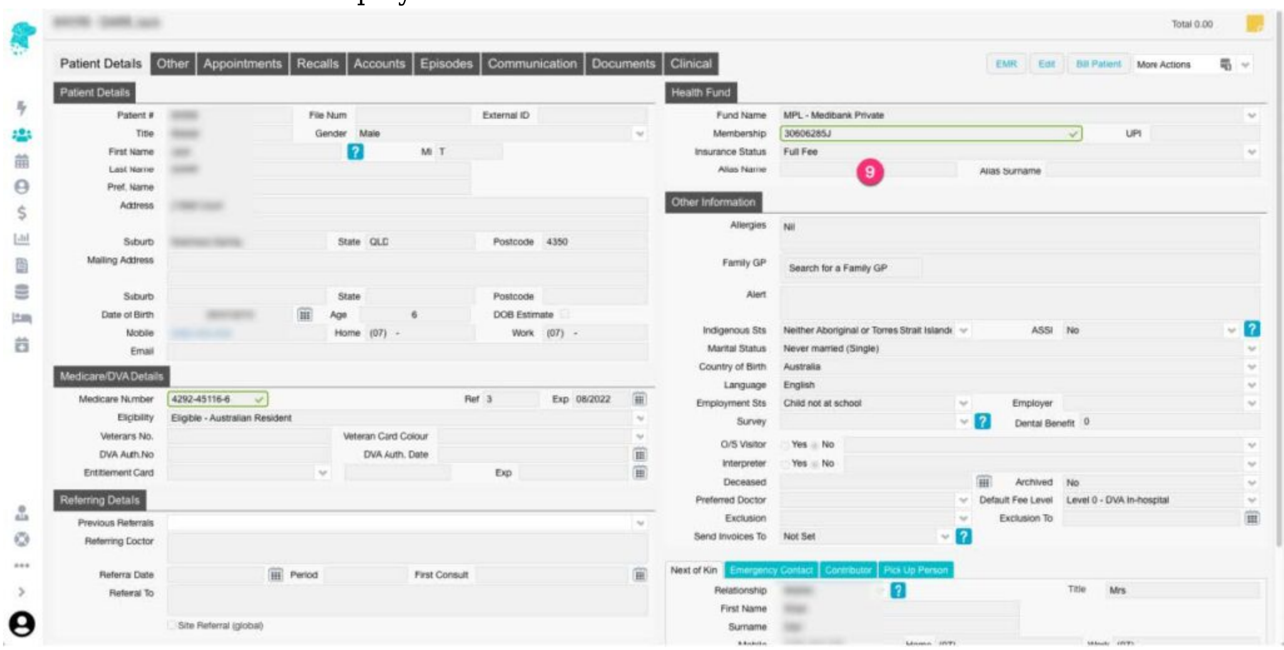
1. OPV checks can be performed from the patient information screen, down the bottom left corner, by clicking **Check**
2. Before the OPV is successful the Medicare Number field & the Health Fund Number field will appear the same as all other fields



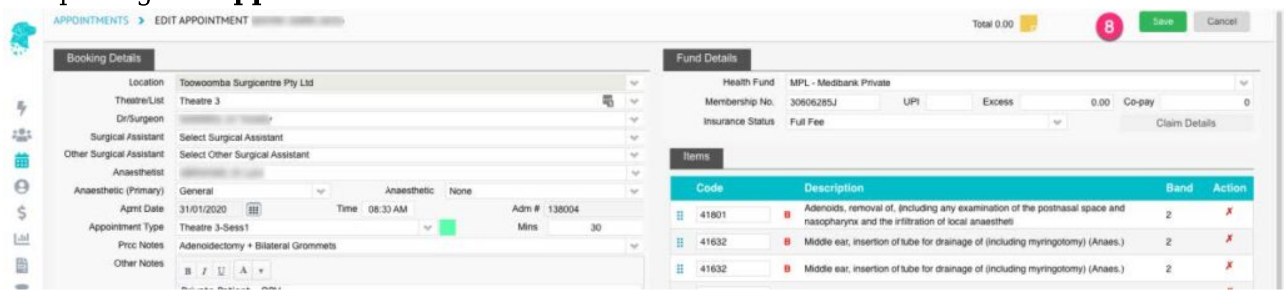
3. Once the information has been successfully verified it will appear with a **green border & tick**, to indicate the information matches the records held by Medicare or the Health Fund
4. If the information isn't able to be verified a visual alert will be displayed, in the top right corner, stating **Verification Issue**
5. Hover over this icon to display a reason for the unsuccessful verification
6. If the reason is as shown, in the below image, the fund wasn't able to be verified as the system was returning the Medicare information. Simply click **Check** again to check the health fund details



7. Once both Medicare & Health fund information has been successfully checked the **Green Border & Tick** will be displayed with both numbers



8. The OPV will automatically be performed when making a patient booking. As long as the relevant patient information is available, the check will run once you click **Save**, after completing the **Appointment Screen**



9. If the patients' name varies from Medicare to the Health fund, utilise the **Alias Name** field under the **Health Fund** section (*as shown in image above*). In order to successfully verify the details in this instance:
    a. Enter the patients name, as it is shown on the **Medicare Card**, in the **Patient Details** section as the patients real name
    b. Enter the patients name, as it is show on the **Health Fund Card**, in the **Alias**

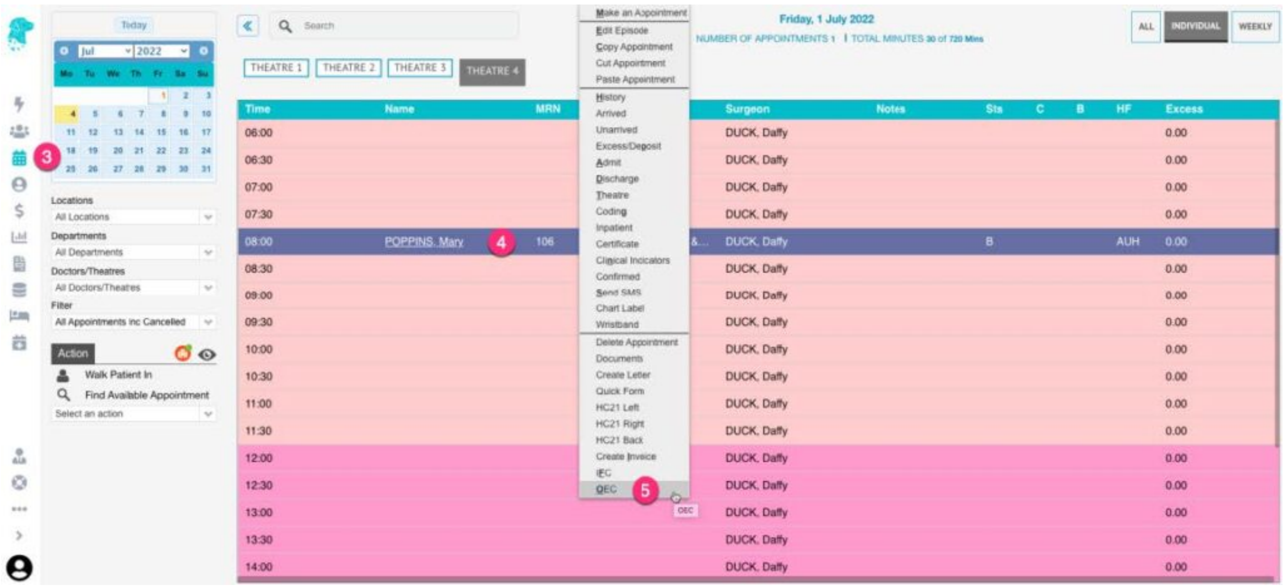
Name** field
c. Run **Check** again

10. In some instances, the OPV will be able to identify the patient, even if the details are slightly incorrect. If this happens the **Verification Issue** icon will become visible & you will be able to hover over it for information regarding the check. Some examples of this would be:
    a. Updating the last digit of the Medicare Card. E.g. From 5 to 6
    b. Updating the Medicare Reference Number. E.g. From 1 to 4
    c. Updating the patients' first name. E.g. From Sam to SAMUEL

Online Eligibility Check – OEC (Hospital)

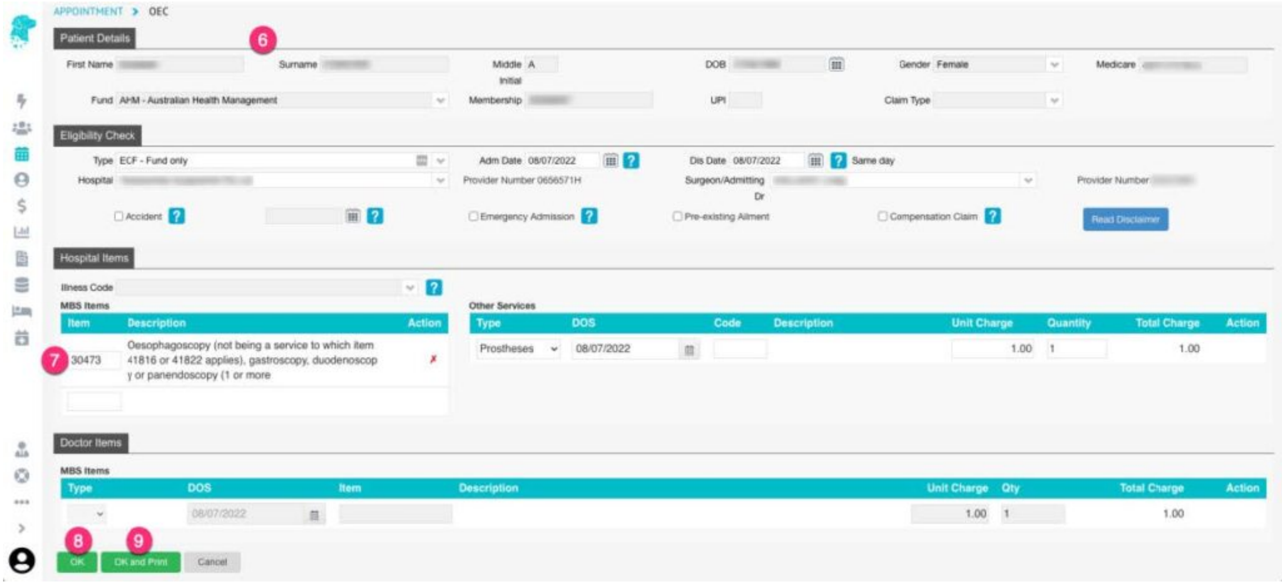
Performing an eligibility check with the patients' health fund to ensure they will be covered for their admission

1. Running an OEC from a booking ensures that all the episode information is carried into the OEC (*see "Making a Patient Booking" instructions to make an appointment*). OEC's can be done from the patient screen, however this will require more information to be entered & the excess & co-payment will not pre-populate as the OEC isn't linked to a particular episode.
2. It is also advised that the Online Patient Verification (OPV) be performed before the OEC (*see "OPV" instructions*)
3. Navigate to the Appointments screen and locate the patient you wish to perform the eligibility check for
4. Right click on the patient to expand the menu
5. Select **OEC**

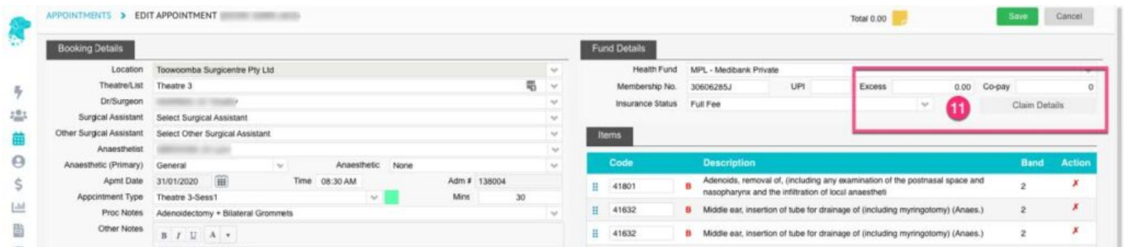


6. The OEC screen will open & the patient & appointment details will be populated with the information already entered into the system
7. If you have entered the predicted item numbers, when booking the patient, they will be carried over into the OEC screen & you will not need to enter them again
8. Click **OK** and a check will be performed on each item number that is entered. The check will be saved in the patient's **Documents**, when it is returned by the health fund, where it can be previewed & printed if required

9. Click **OK and Print** to have the health fund check appear on the screen to preview straight away & print if required. (*NB this function will only work if the health fund returns the information in a timely manner. Otherwise, it will be filed in the patients' Documents when it is returned*)



10. Information returned will include:
    a. Patient Information
    b. Assessment & Explanation
    c. Admission details as entered to perform check
    d. Financial Status of the cover
    e. Pre-Existing status of the cover
    f. Illness code/Item number that check was performed for
    g. Excess amount
    h. Co-Payment amount
    i. Level of cover name
    j. Level of cover description
    k. Benefit limitations
    l. Exclusions
11. Excess amount & Co-Payment amount will automatically populate in the patient appointment, as long as it has been returned in the correct format from the health fund. If the information hasn't automatically populated, & needs to be manually entered, this can be done by:
    a. *Selecting the required booking*
    b. *Right click & select Edit Episode*
    c. *Fill in the required amounts in the Excess & Co-Pay fields in the top right of the screen*
    d. *Click* ***Save***

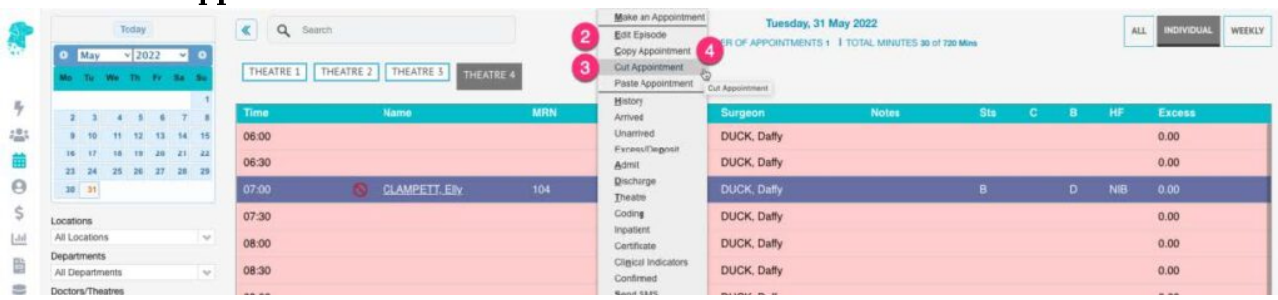


12. Carefully read all information returned by the fund to determine eligibility for admission. Including descriptions, benefit limitations & exclusions

[Move a Patient Appointment Time (Hospital)]

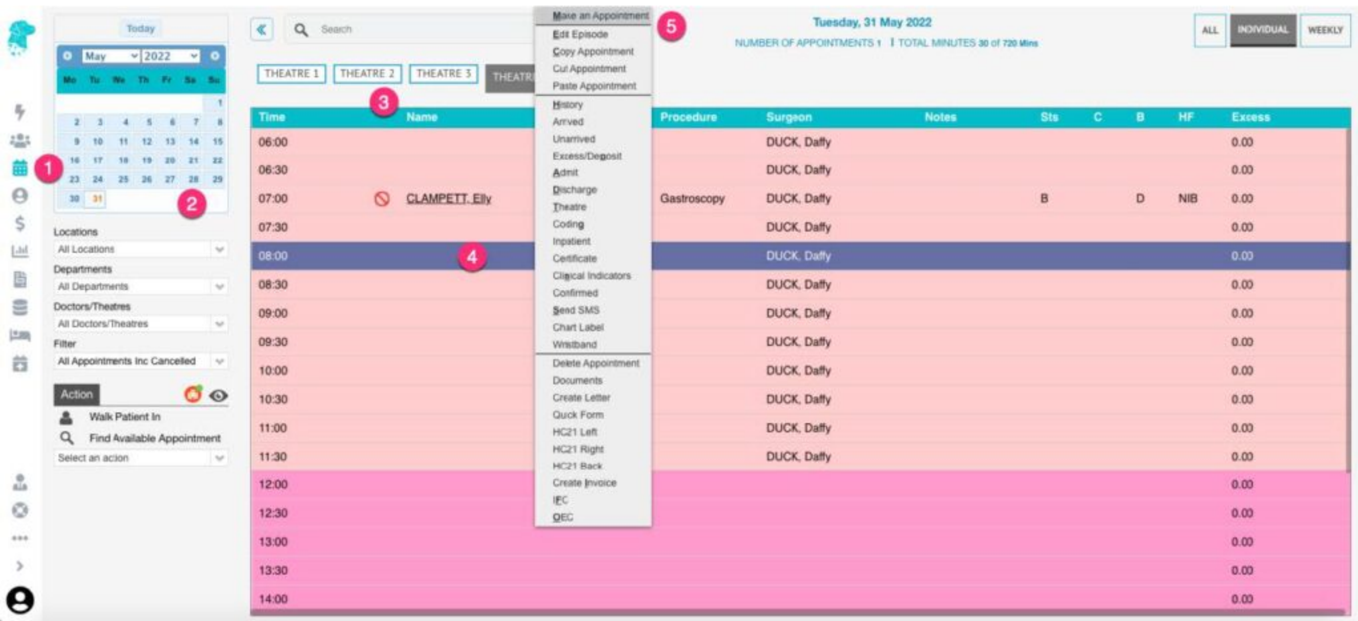
If a patients admission time changes, there are numerous ways to amend. Any one of the below options will work (you do not have to do ALL of these options in order)

1. Select the patient, **click, hold & drag** their booking to the new admission time
2. **Right-Click** and select **Edit Episode**. Type the new appointment time in the **Time** field & click **Save**
3. **Right-Click** and select **Cut Appointment**. Click on the new appointment time, **Right-Click** and select **Paste Appointment**
4. To copy a booking select the appropriate booking, **Right-Click** and select **Copy Appointment**. Select the desired appointment date & time for the duplicate, **Right-Click** and select **Paste Appointment**

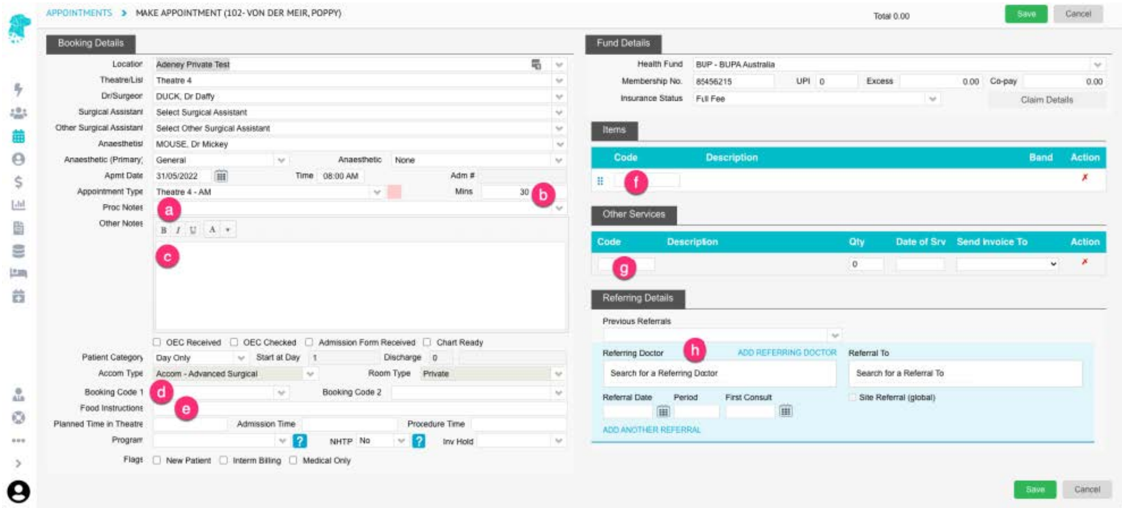


[Making a Patient Hospital Booking]

After creating a Theatre Roster patients can be booked.



1. Select **Appointments** from the main menu
2. Select **Date** that the booking is required to be made
3. Select **Theatre** where booking will be made
4. Select **Time** the booking will be made. Then **Right-Click** on this time slot to display options
5. Select **Make an Appointment** from the menu
6. The **Patient Lookup** screen will be displayed to search for the required patient
7. Select a patient from the list displayed, or click **Create New Patient** if the patient isn't shown
8. If **Create New Patient** was selected, input all known data & click Save
9. If a patient was selected in Step 7 (or after the new patient details have been saved) the **Make Appointment** screen will automatically open
10. Information relating to the theatre, surgeon, anaesthetist, appointment time etc will pre-populate if they have already been entered into the system
11. Add information required **according to your facility work instructions**. For example:
    a. Procedure Notes
    b. Length of Booking
    c. Other Notes
    d. Booking Code 1
    e. Food Instructions
    f. Item Numbers
    g. Other Services Codes
    h. Referring Doctor



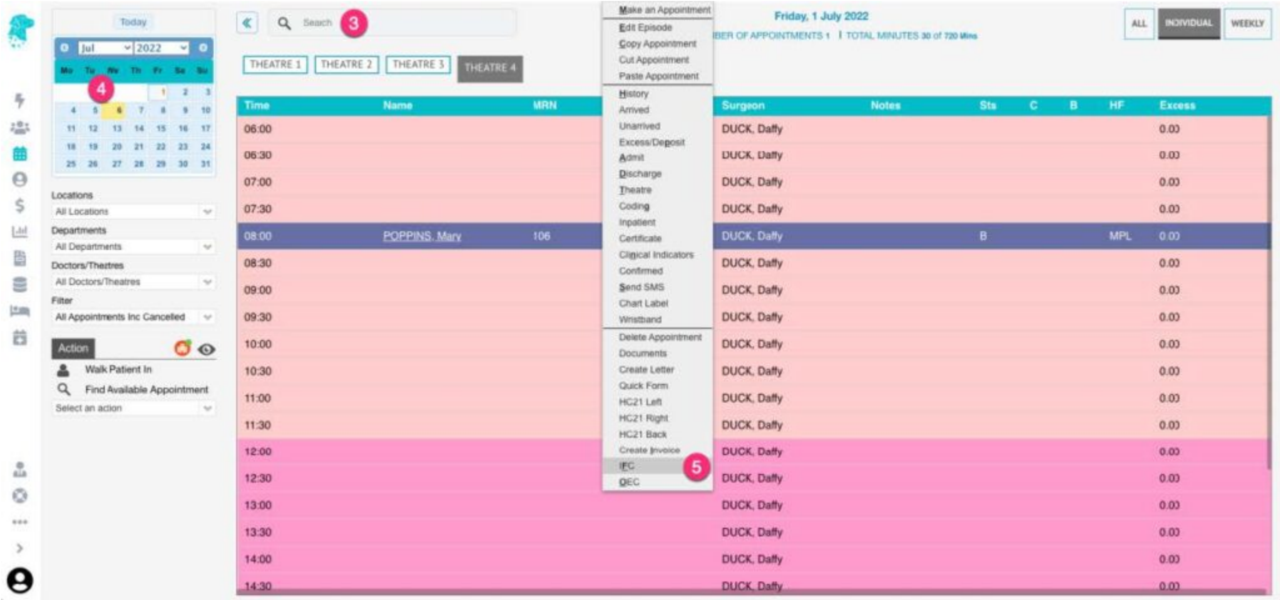
12. Click **Save**

Informed Financial Consent – IFC (Hospital)

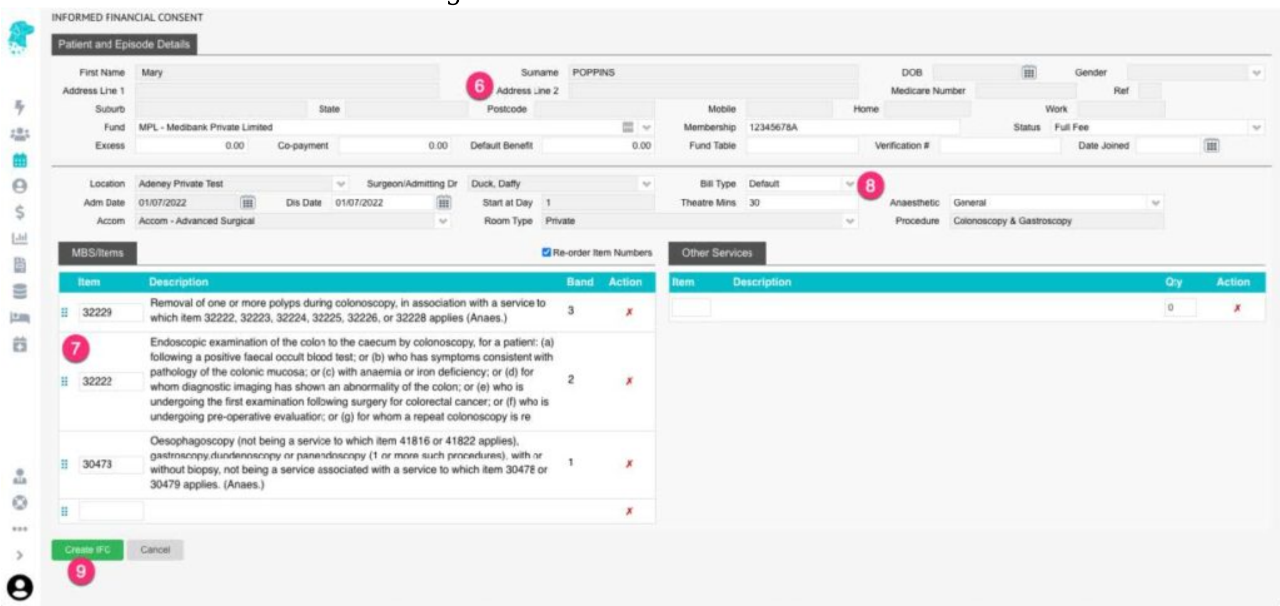
To provide patients' with information they can understand regarding the costs involved with their admission/episode

1. Before an IFC is generated it is advised to run an Online Eligibility Check (OEC) to obtain the out-of-pocket expense for the patient (*see "OEC – Online Eligibility Check" instructions*)
2. Once the out-of-pocket cost is known, the IFC can be generated from the **Appointments Screen**
3. Search for the required patient or

4. Navigate to the admission date, theatre & time to locate
5. Right click to expand the options & select IFC



6. Patient details & admission details will be pre-populated into the IFC screen
7. If Item numbers were entered at the time of booking, they will be pre-populated into the IFC screen. Otherwise add them under the **MBS/Items** heading
8. Leaving the **Bill Type** set to **Default** will allow FYDO to decide how the fees need to be raise, in accordance with the health fund contracts entered into the system
9. Click **Create IFC** to see the charges raised for each item



10. Contracted fees will be displayed
11. Patient out of pocket will be displayed
12. **IFC Message** gives the ability to add a customised message. Use the dropdown to select **Custom Message** & type the message in the field below
13. The **Template** field allows you to choose from the available IFC templates in your FYDO database.

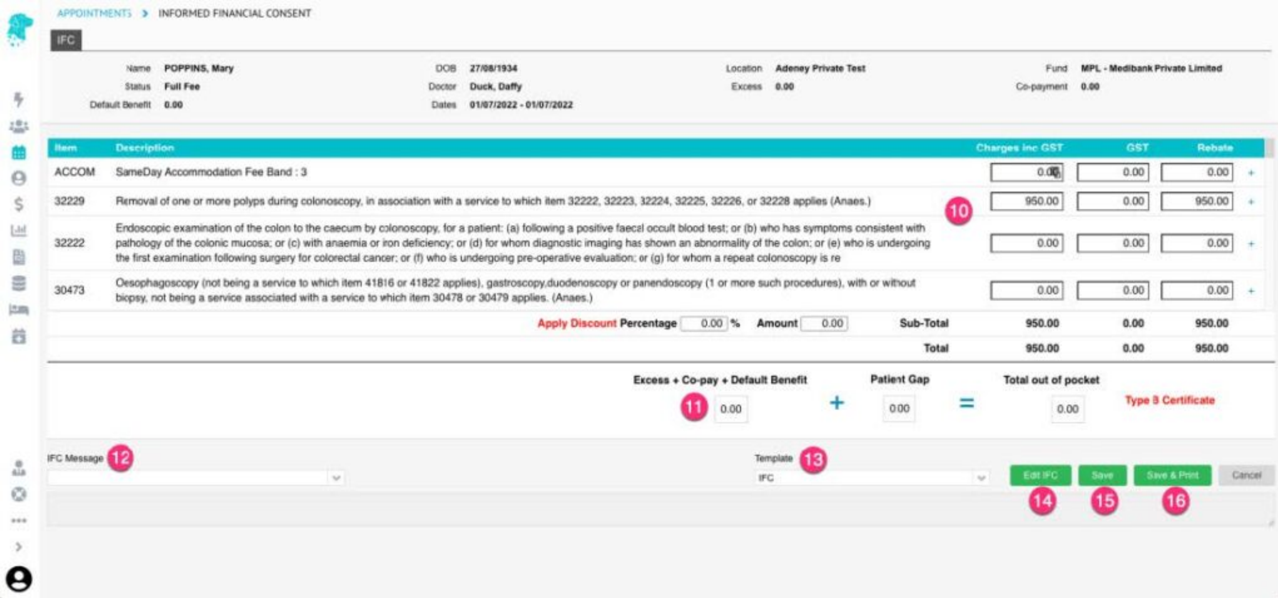
    FYDO enables hospitals to set a default IFC template for both **insured** and **uninsured** admissions. AS a result, the **Template** dropdown will display options based on the patient's health fund.

    – If the **patient has a health fund**, the Template dropdown will show the **insured templates** available in FYDO.

    – If the **patient is uninsured –** or if their health fund is categorised as **uninsured** in the

FYDO database – the Template dropdown will display the **uninsured templates** added to FYDO.

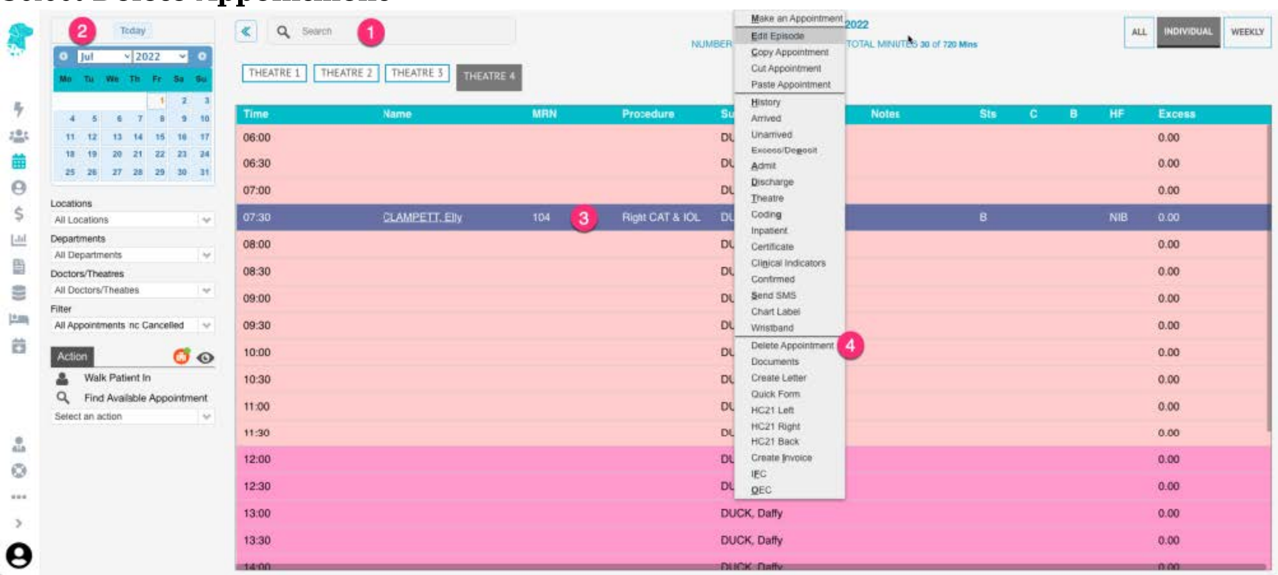
14. **Edit IFC** allows you to return to the previous screen to make any changes require to the item numbers etc.
15. **Save** will generate the IFC & save a copy in the patient **Documents**
16. **Save & Print** will generate the IFC & make it immediately available to view & print. This option will also save a copy in the patients' Documents



Delete a Hospital Booking

If an appointment is required to be removed from the system

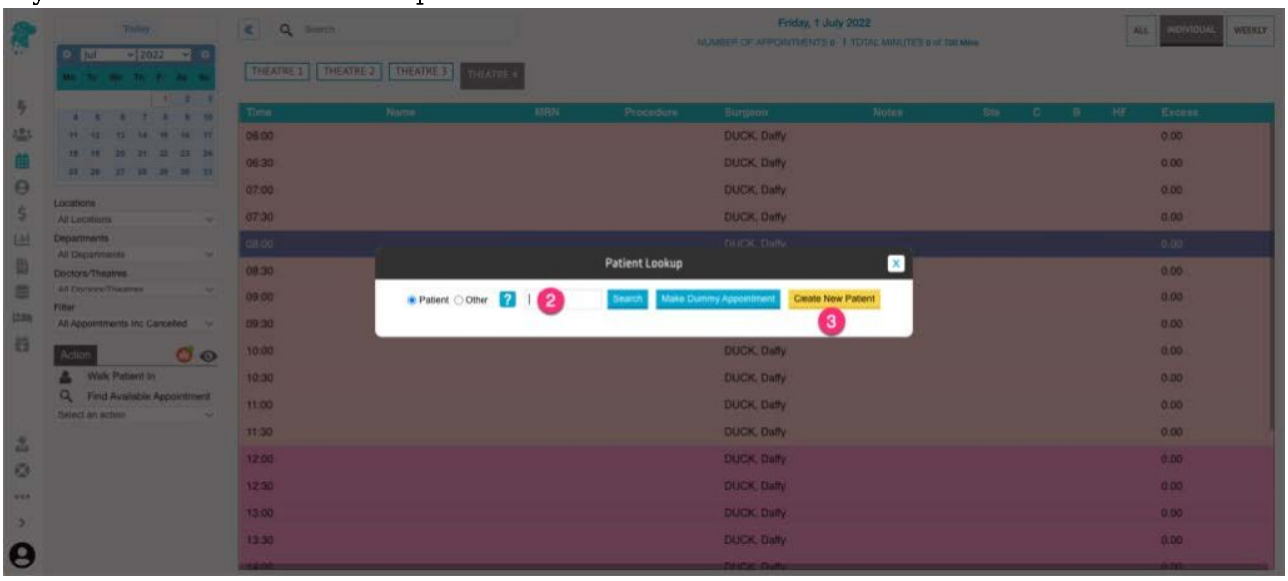
1. Search for the patient **OR**
2. Navigate to the date & theatre that the patient is booked for
3. Select the patient & right click to open menu
4. Select **Delete Appointment**



5. You will be prompted to **confirm** that you are sure you want to delete the appointment
6. Click **Yes**
7. This action is permanent & is not advised if you are required to collate data on cancelled bookings. If statistical information on the cancellation is required then please see instructions on how to **Cancel a Booking** at https://wiki.fydo.cloud/cancel-a-booking/

[Create a New Patient (Hospital)]()

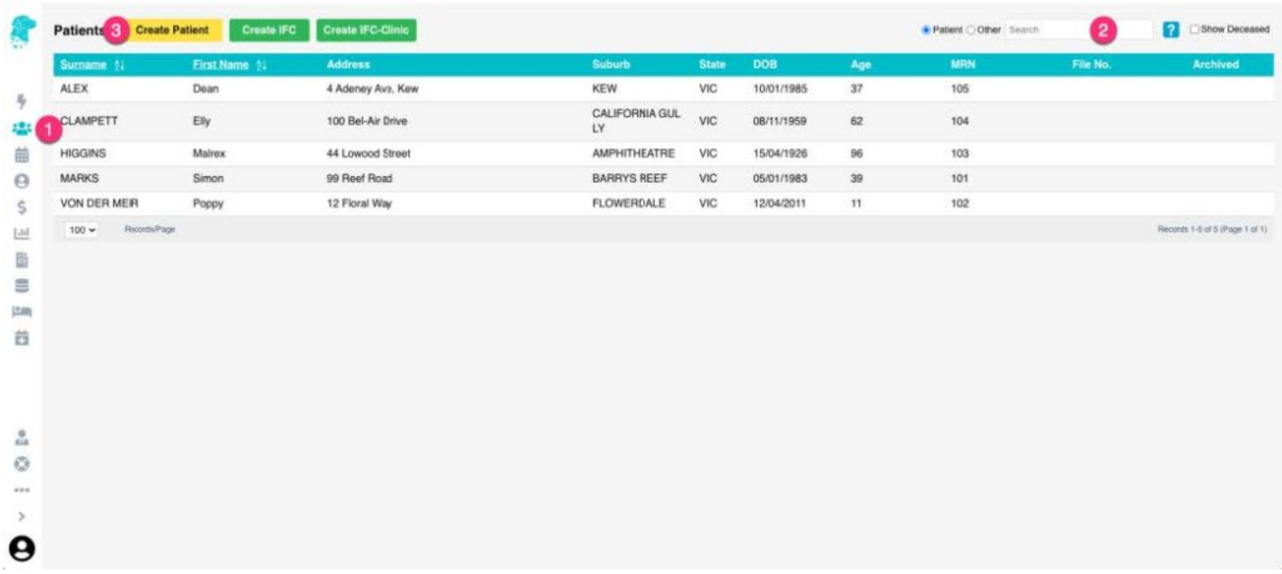
There are a number of ways this can be done. Most commonly it would be done while making an appointment.

1. Once you have navigated to the date & time for the appointment, right click & select **Make an Appointment**
2. This will open up the **Patient Lookup** box where you are able to search for the desired patient
3. If you are unable to locate the patient click the **Create New Patient** button


4. You are required to add a minimum of **First & Last Name** and all other fields are optional when initially adding a patient (*but be aware that certain fields may be required, once the patient is admitted, for reporting purposes*)
5. Once all desired information is entered click **Save**
6. The appointment screen will then open to add all required information for that particular booking

Patients are also able to be added without having an appointment scheduled.

1. Select the **Patients** tab from the left main menu
2. **Search** to see if the patient is already entered into the system
3. If they have not previously been added, click **Create Patient**

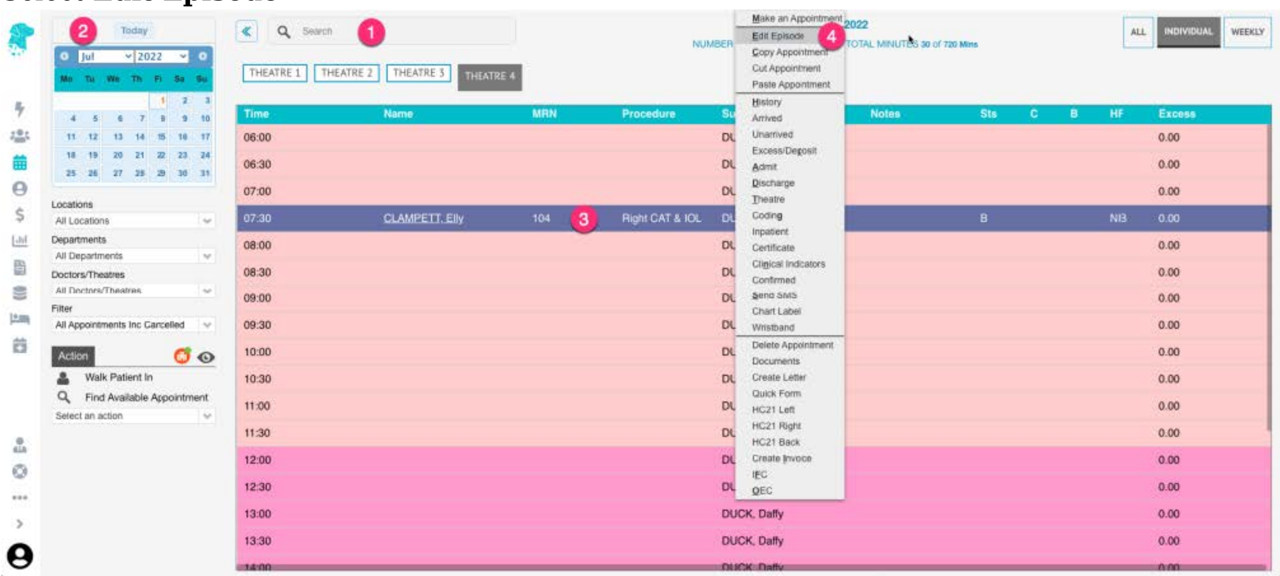


4. You are required to add a minimum of **First & Last Name** and all other fields are optional when initially adding a patient (*but be aware that certain fields may be required, once the patient is admitted, for reporting purposes*)
5. Once all desired information is entered click **Save**

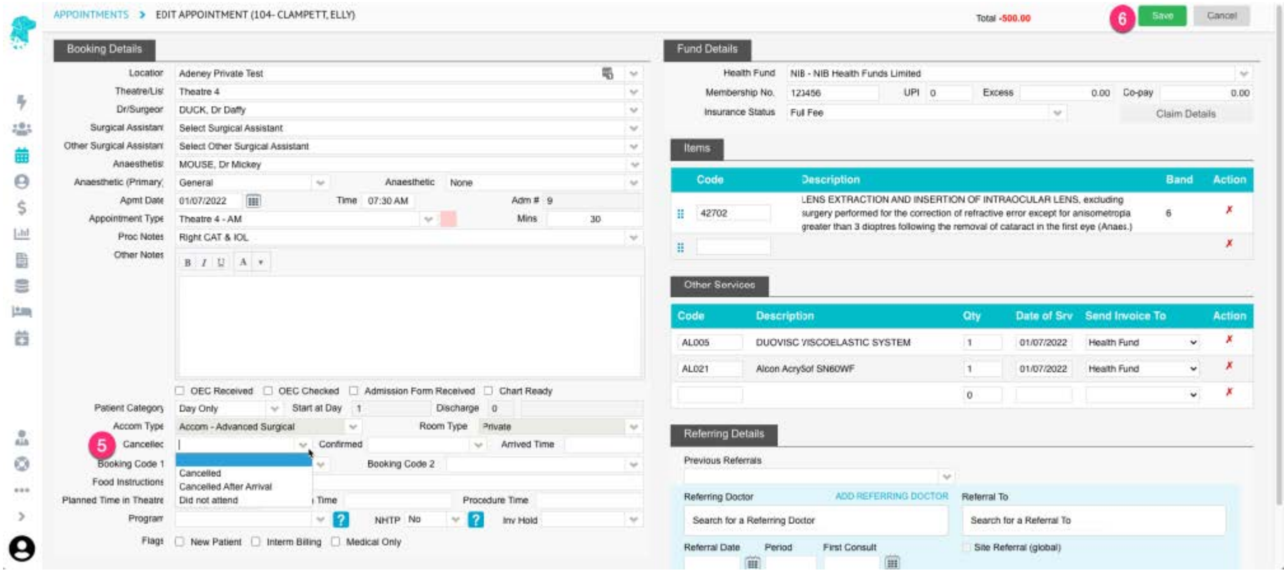
Cancel a Hospital Booking

If a patient cancels their appointment

1. Search for the patient **OR**
2. Navigate to the date & theatre that the patient is booked for
3. Select the patient & **right click** to open menu
4. Select **Edit Episode**



5. Use the **Cancelled** drop down to select a reason for cancellation (*N.B these cancelled reasons are fully customisable & can be added or edited in **Setting** under the **Cancelled Reasons** option to assist facilities obtain the cancellation data that they require*)
6. Click **Save**



7. The patient will now be displayed with a strikethrough & the appointment time will be available to book another patient
8. To view your screen without the cancelled patients, use the **Filter Dropdown** and select **All Appointments Exc Cancelled**

9. To view the cancelled patients ensure you select **All Appointments Inc Cancelled** from the **Filter Dropdown**
10. To reinstate an appointment, follow the above steps **1 > 4** and **remove** the cancellation reason from the episode before clicking **Save**

[redacted]

Depending on how far a patient is along their journey, there are different ways to handle a cancelled episode. For example, a patient who cancels before arriving at the facility will need to be handled differently than one who cancelled after admission.
The facility should determine the most appropriate option for each individual scenario. Below are a few options for processing these cases in FYDO:

[redacted]

If the patient **did not arrive at the facility** and was **not admitted**, the standard cancellation instructions above will apply. The episode will not be admitted and will simply be cancelled.

If the patient **did arrive** and was **admitted but did not proceed**, the facility can choose to revert the **episode back to a booking** by **Un-discharging** and **Un-admitting** the episode. Again, this will be up to the facility to decide if this is require depending on how far the patient journey progressed. This can be done via the **Episodes Screen** by utilising the **Right-Click Menu.**

The patient may need to be **refunded** any moneys paid, or the facility may choose to keep it and apply to another admission down the track.

[redacted]

If the patient was admitted and progressed partway through their journey, the more appropriate option may be to **complete the episode** by **admitting** and **discharging** them.
Depending on how far they progressed, you may need to populate the **Visit to Theatre** field with **No Theatre Procedure Performed** when discharging the episode.

As every discharged patient is reported to the Department of Health, a **principal diagnosis code is mandatory**. If the facility opts to admit and discharge the episode, it will need to be **coded.**
Please confirm the correct process with your coder. However, as an example, there would typically be a **primary diagnosis code**, and an additional diagnosis code explaining why the procedure was cancelled.

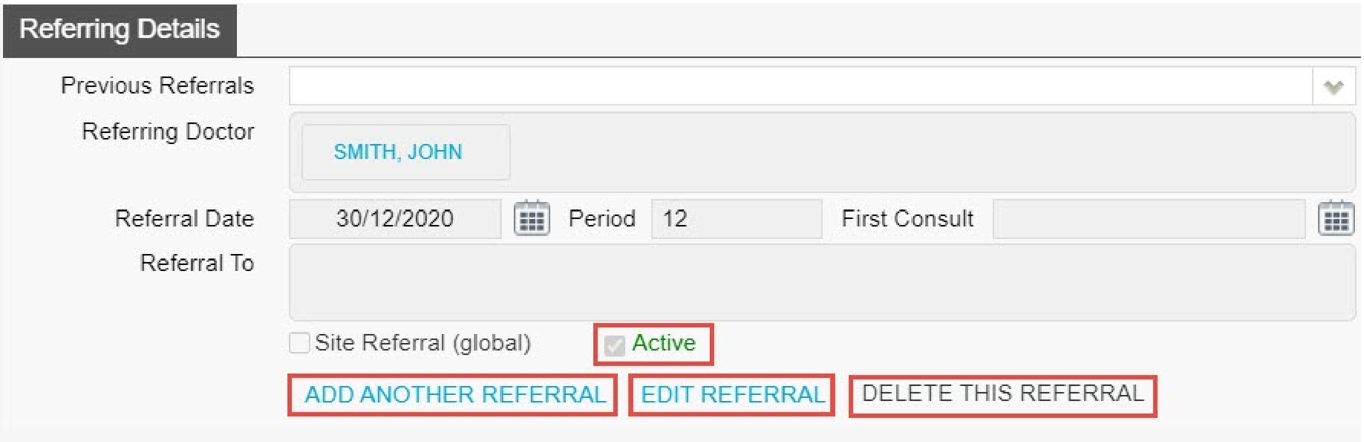
[redacted]

When raising an invoice, please be aware that if an **accommodation band** is billed, it is implied to the health fund that the patient received an anaesthetic. In this instance, an **anaesthetic procedure code** must also be included in the coding screen.
Facilities will need to check their individual health fund contracts in order to decide if they can raise a charge for the particular admission.

Editing, deleting, and inactivating referrals

Made a mistake when creating the referral? No problem. Read on to see how to edit or delete referrals.

Start off by opening a patient’s record. Below is an example of the referral section of a patient’s record.



- **Add another referral**: FYDO allows you to have multiple referrals for a given patient. Use this button to add another referral
- **Edit referral**: this button allows you to make changes to any of the data fields of a given referral
- **Delete this referral**: this button will remove the referral
- **Active**: untick this checkbox to make the referral inactive