Results of an OEC

If you have not submitted an OEC yet, please see our guide found <u>here</u>

To find your **OEC**, first access the **Documents** from that patients record.

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You will see a list of all the recorded documents for this patient. The **OEC's** that were returned will have the **Name** and **Type** of **OEC**. Select one to view a preview. These documents can be printed or saved as needed, but will always be kept here within the patient record.

×

The first part of your **OEC** contains some patient information, as well as the **Medicare** and **Fund** status on the check. It will also show the **Explanation**, on our **OEC** below we can see that the patient is eligible, but subject to conditions:

Health Fund Assessment

The next part of the **OEC** details exactly what the patient is eligible for. We can see any **Excess or Co Payments**, as well as a description of each of what the patients cover is limited to. Any **Excess** shown here will be automatically updated in the **Appointments** screen for this patient.

×

Just below the excess and co payment information, you will find the final details of the **OEC**. The fund will detail the members cover and the description will mention services that are excluded. There is also space for **Benefit Limitations** and **Exclusions**, if your **OEC** shows the patient as not having cover, these fields will detail what the exclusions are and why the patient is not covered.

×

Finally, there is a field for any **Other Services** that were checked, such as **Prosthesis** items.

×

Searching for a Patient

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

Patient Other Search Show Deceased

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.

Patient Other	Search	Show Deceased	?

This will bring up a helpful menu like so:

		Date of Birth : 19/11/1981
Patient Other	Search	Name : Smith, Alan 🛛 💡
		MRN : 123

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



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.



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

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

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

Pat	ient Details	Other Appointme	ents Recalls	Accour 1 Episo	odes Communica
No.	Adm #	Adm. Date	Dis. Date	Sts	Nights
3	2 1497	23/01/2019	23/01/2019	Discharged	D/O
2	1234	31/05/2018	31/05/2018	Discharged	D/O
1	1004	04/10/2017	04/10/2017	Discharged	D/O

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



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

Mobile: Mobile number of the patient.

Medicare: Medicare number of the patient.

Merging Duplicate Patients

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



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

- First Name and Last Name
- Date of Birth

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

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

How to Merge Patients

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

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



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

	Merge Patient	
MRN 3445 Patient TESTER, Te	DOB 01/01/1990	Gender Male
Select a medical re 3445 will not longe the selected MRN	ecord where the patient above will b er exist and all appointments/episod below.	be merged into.This mean MRN les and invoices will be moved into
	Q Search	
		Cancel

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

			Patient	Lookup			x
	® F	Patient	er <mark>?</mark> t	est Search			
Sumame	Firstname	MRN	FileNo	Address	DOB	Age	
Malatesta	CARL	2151.0		9/20-22 Loch Street CAMPSIE	14/09/1927	92	^
Tester	Test	3445		123 Test Street	01/01/1990	30	
Tester	Test	3446		123 Test Street	01/01/1990	30	-

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

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

	Merge Patient	
MRN 3445 Patient TESTER Te	DOB 01/01/1990	Gender Male
Select a medical r 3445 will not longe the selected MRN	ecord where the patient above will b er exist and all appointments/episode below.	e merged into.This mean MRN es and invoices will be moved into
	Q test	
	Merge into	
MRN 3446	DOB 01/01/1990	Gender Male
Patient TESTER, Te	st	
		Merge Cancel

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

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

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



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

The Audit Log

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

To access the Audit Log, first select Settings



Then Logs from the menu

Logs

You will now see the Audit Log:

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

This screen shows us some important information such as:

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

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

How to Create a Patient

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



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

NEW PATIENT BEING CREATED

Patient Details	Other							
Patient Details								
Patient #		File	Num		1	External ID		
Title	Mr	G	ender	Male				~
First Name	John				<u>ا</u>	? М	li	
Last Name	SMITH							
Pref. Name								
Address	123 ACSS Street							
Suburb	HOMEBUSH		State	NSW		Postcode	2140	
Mailing Address								
Suburb			State			Postcode		
Date of Birth	01/01/1990		Age	30		DOB Estim	ate 🗆	
Mobile	0412-345-678		Home	(02)1234-5678		Work	() -	
Email	John.Smith@test.com.au							
Medicare/DVA Details	5							
Medicare Number	2111-1111-1				F	Ref 1	Exp 05/2025	
Eligibility								~
Veterans No.			Vete	eran Card Colour				~
DVA Auth.No				DVA Auth. Date				
Entitlement Card		4	×			Exp		
Health Fund								
Fund Name	BUP - BUPA Australia							~
Membership	123456					UPI		
Insurance Status	Full Fee							~
Alias Name				Alias Surname				

Referring Details

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

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

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

Previous Referrals						~
Referring Doctor	Search for a Refer	ring Doct	or			
	ADD REFERRING DO	CTOR				
Referral Date	03/05/2020	Î	Period	12	First Consult	Î
Referral To	Search for a Refer	ral To				
	Site Referral (glob	al)		Active		
	ADD ANOTHER RE	FERRA	L EDI	TREFERRAL		

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

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

Adding a Referring Doctor

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

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

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

Referring Doctor [Details	
Numb	ber Provider Number 1	23456AF
Tit	Title Dr	
First Nan	ame Test	
Surnan	ame Doctor	
Practice Nan	The ACSS Test Practice	
Addre	ress 123 ACSS Street	
2 .1.1		0140
Subu	NSW NSW	2140
FIIO		
Туре	GP	× ?
Speciality		~
Email	Test Dr@test.com.au	
	rest.Di@itest.com.au	
Mobile		
0	00/00/0000	
Created On	26/03/2020	
Birthdate	01/01/1990	
Status	✓ Active	

When you are done, click the green Save button.



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

Save

All done! We have created our first patient.

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

Deleting a Patient

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

Edit	Bill Patient	More Actions	•
			~
	UPI	0	
			~

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



Done! The patient has now been deleted.

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



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

- Outstanding Hospital Episodes
- Appointments
- Outstanding Invoices

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

The Audit Log

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

To access the Audit Log, first select Settings then Logs

This will take us to the Audit Log.

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

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

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

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

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

Online Patient Verification - OPV

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

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

How to perform an OPV

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

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

×

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

Simply select the following:

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

×

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

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

×

Alternatively, you may also use a shortcut on your keyboard: $oldsymbol{V}$

Outcomes of an Online Patient Verification

There are three main outcomes of an OPV.

1. Successful

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

××

2. Successful with a Verification Issue

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

Verification Issue

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

Total (Total 0.00	Verification Issue		
	Edit	Bill Patient	More Actions	s 🖷	~
					*
		UPI			

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

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

3. Failing an OPV

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

However, this message is different:



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