

# Searching for a Patient

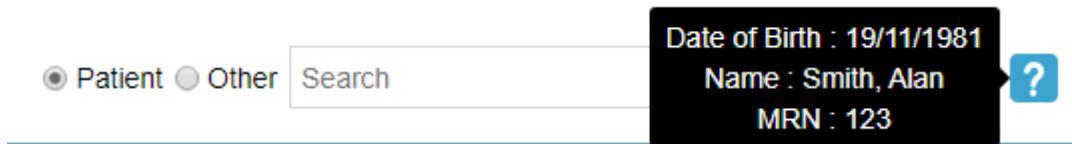
In Fydo, there are a few different ways we can search a patient.



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.

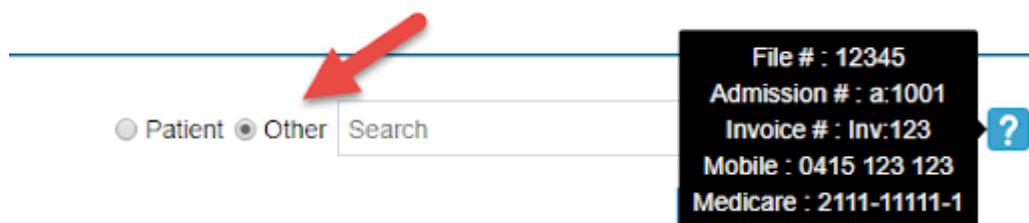
### MRN: A search by the patient's **Medical Record Number**

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.

### Other:



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

A screenshot of the 'Patient Details' screen. It shows a form with fields for Patient # (3444), Title (Mr), First Name (Alan), Last Name (SMITH), File Num (12345), Gender (Male), External ID (7210), and a dropdown menu. A red arrow points to the 'File Num' field. The 'Patient Details' tab is highlighted in the top navigation bar.

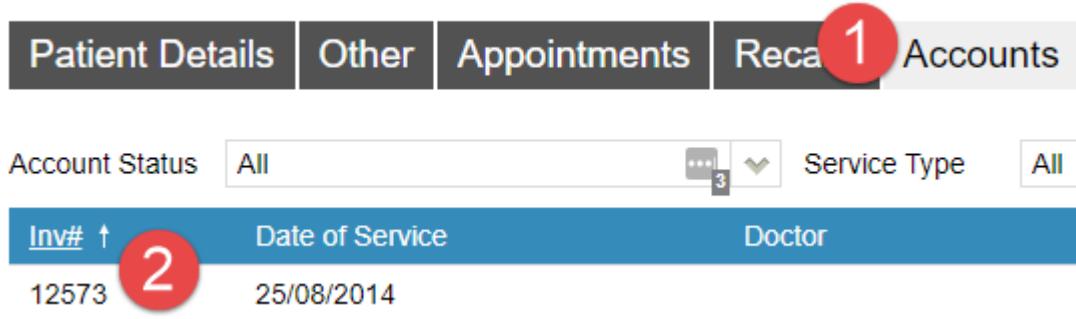
**Admission #:** Admission number for the patient (this is a number for patients that have Hospital episodes). Can be found in **Episodes**, from the **Patient Details** screen.

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

A screenshot of the 'Episodes' screen. It shows a table with columns: No., Adm #, Adm. Date, Dis. Date, Sts, and Nights. The table has three rows. The second row is highlighted with a red circle containing the number '2'. The data in the table is as follows:

No.	Adm #	Adm. Date	Dis. Date	Sts	Nights
3	1497	23/01/2019	23/01/2019	Discharged	D/O
2	1234	31/05/2018	31/05/2018	Discharged	D/O
1	1004	04/10/2017	04/10/2017	Discharged	D/O

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



The screenshot shows a navigation bar with tabs: Patient Details, Other, Appointments, Recall, Accounts. The Accounts tab is selected and has a red circle with the number 1. Below the navigation bar is a search bar with 'Account Status' set to 'All' and a dropdown with '3' items. To the right is a 'Service Type' dropdown set to 'All'. Below the search bar is a table with three columns: 'Inv#' (sorted by ascending order), 'Date of Service', and 'Doctor'. The first row shows '12573' in the 'Inv#' column, which is highlighted with a red circle and labeled with the number 2. The 'Date of Service' is '25/08/2014' and the 'Doctor' is 'Doctor'.

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

**Mobile:** Mobile number of the patient.

**Medicare:** Medicare number of the patient.

## Merging Duplicate Patients

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

### Patient Details

A similar patient was found in the database  
MRN - 176 Test PATIENT  
with DOB - 01/01/2000  
and Address - 123 Test Drive, REDCLIFFE, QLD, 4020

Do you still wish to save this patient or cancel?

**Yes**      **Cancel**

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

- **First Name and Last Name**
- **Date of Birth**

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

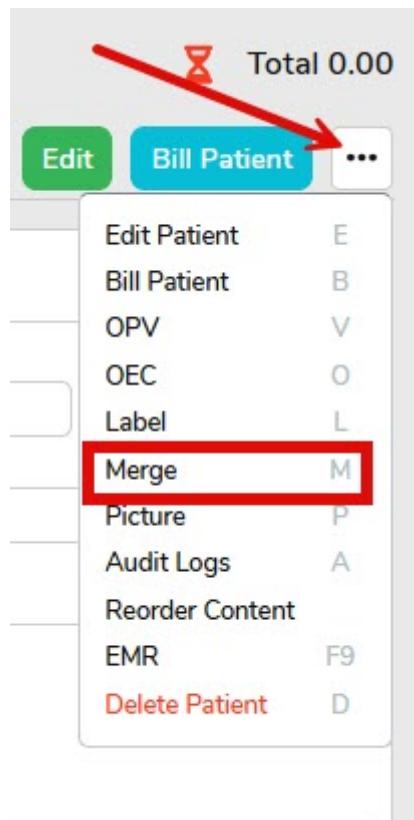
Despite this, you may realise at some point that you have a duplicate patient. If you run into this issue, read ahead to find out how to **merge** the patients together.

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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.

## Merge Patient



Search for patient....

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

### Merge Information

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

Cancel

Merge Patient

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

### Patient Lookup



Patient  Other  patient, test Search

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

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

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

## Merge Patient

 patient, test

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

### Merge Information

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

**Cancel**

**Merge Patient**

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

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

## Merge Patient

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

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

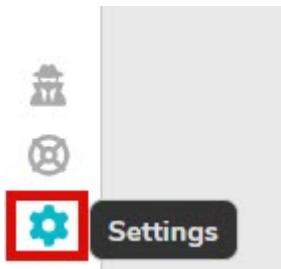
**OK**

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

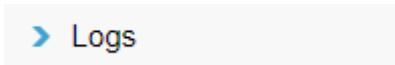
## The Audit Log

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

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



Then **Logs** from the menu



You will now see the **Audit Log**:

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

This screen shows us some important information such as:

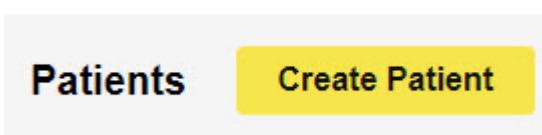
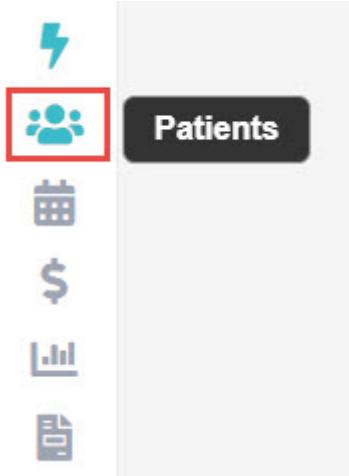
- **Username:** The user who performed the action
- **Message:** What happened, in the above case we have some logins and the patient that was merged.
- **Date created:** The date this action happened, as well as the time.

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

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## 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
<b>Patient Details</b>		
Patient #	File Num	External ID
Title	Mr	Gender
First Name	John	Mi
Last Name	SMITH	
Pref. Name		
Address	123 ACSS Street	
Suburb	HOMEBUSH	State NSW Postcode 2140
Mailing Address		
Suburb		Postcode
Date of Birth	01/01/1990	Age 30 DOB Estimate
Mobile	0412-345-678	Home (02)1234-5678 Work ( ) -
Email	John.Smith@test.com.au	
<b>Medicare/DVA Details</b>		
Medicare Number	Ref 1	Exp 05/2025
Eligibility		
Veterans No.	Veteran Card Colour	
DVA Auth. No	DVA Auth. Date	
Entitlement Card	Exp	

Health Fund

Fund Name	BUP - BUPA Australia	UPI
Membership	123456	
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**.

Referring Details

Previous Referrals	
Referring Doctor	Search for a Referring Doctor
<a href="#">ADD REFERRING DOCTOR</a>	
Referral Date	03/05/2020 <input type="button" value="Period"/> 12 <input type="button" value="First Consult"/>
Referral To	Search for a Referral To
<input type="checkbox"/> Site Referral (global) <input checked="" type="checkbox"/> Active	
<a href="#">ADD ANOTHER REFERRAL</a> <a href="#">EDIT REFERRAL</a>	

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

Number	<input type="text"/>	Provider Number	123456AF	
Title	Dr			
First Name	Test			
Surname	Doctor			
Practice Name	The ACSS Test Practice			
Address	123 ACSS Street			
Suburb	HOMEBUS	NSW	2140	
Phone	(0-	Fax	(0-	

Type	GP		
Speciality			
Email	Test.Dr@test.com.au		
Mobile	- - -		
Created On	26/03/2020		
Birthdate	01/01/1990		
Status	<input checked="" type="checkbox"/> Active		

When you are done, click the green **Save** button.

**Save**

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

**Save**

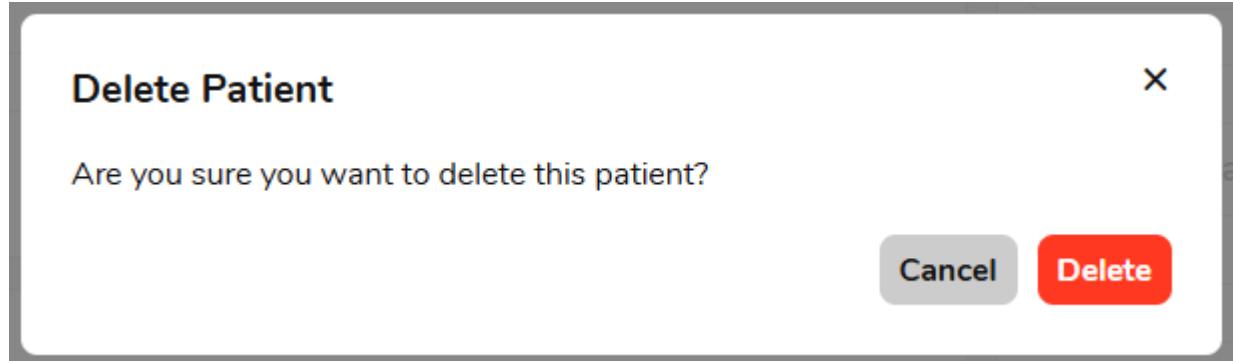
All done! We have created our first patient.

*To understand the importance of an **Online Patient Verification**, and how to do one yourself:  
[Click Here](#)*

# Deleting a Patient

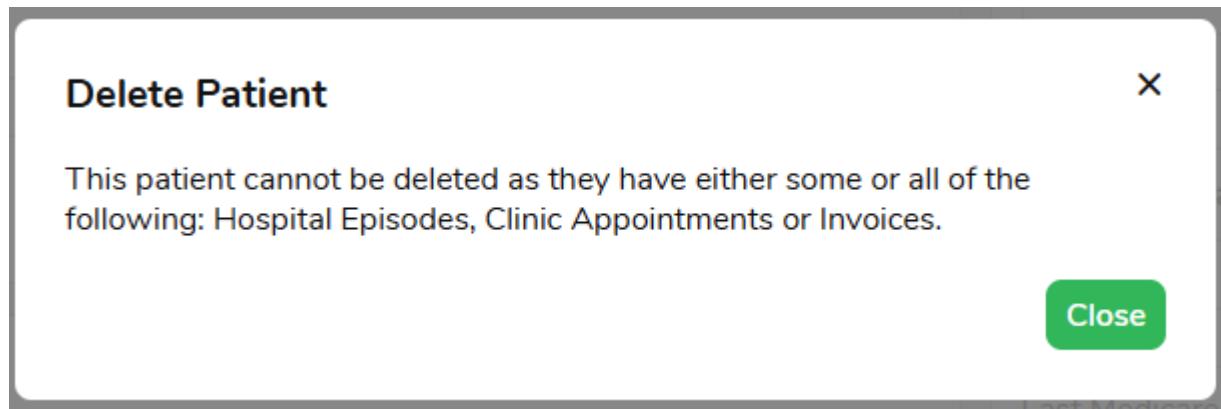
From the **Patient Screen**, select the more actions drop down, then **Delete Patient**

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**

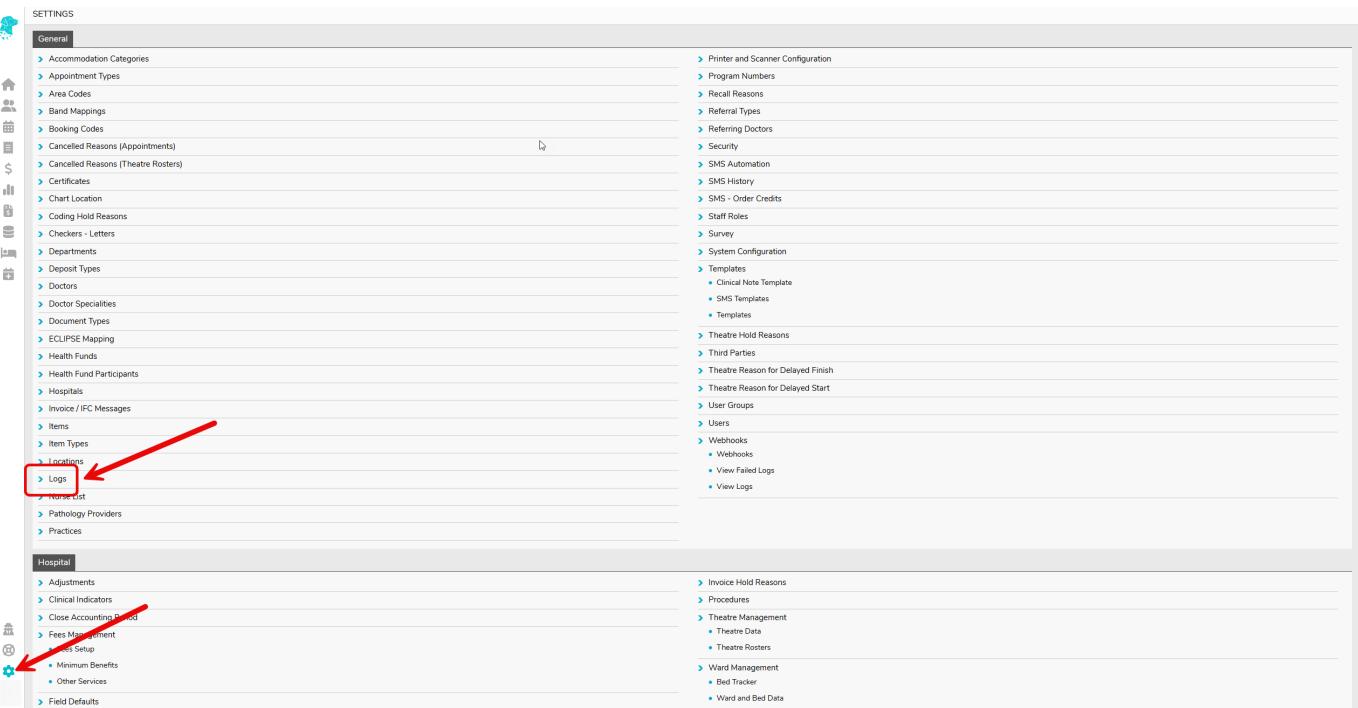
If you wish to delete this patient, you will have to resolve any of the above issues first.

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## **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.



The screenshot shows the 'SETTINGS' menu in Fydo. The 'General' section is expanded, showing various configuration items like 'Accommodation Categories', 'Appointment Types', and 'Area Codes'. The 'Logs' item under 'Locations' is highlighted with a red box and a red arrow pointing to it. The 'Hospital' section is also visible, with a red arrow pointing to the gear icon, indicating the path to Settings.

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
[REDACTED]	Patient Delete - Daisy DUCK - MRN: 101 has been deleted

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

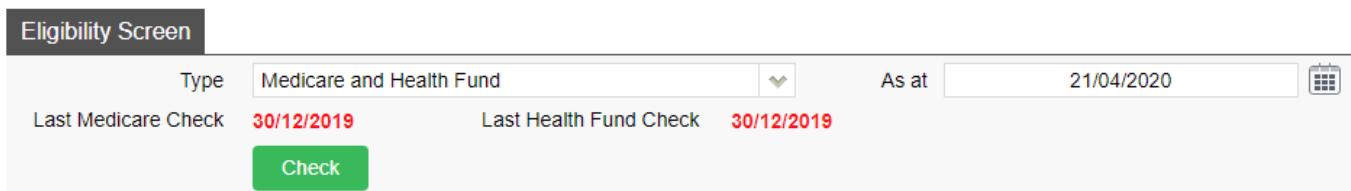
An Online Patient Verification (**OPV**) is a check you should perform before billing a patient, to avoid potential rejections. This function will check the details you have entered against the records Medicare, DVA or a Health Fund have on their system.

**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.



The image shows the 'Eligibility Screen' interface. At the top, it says 'Eligibility Screen'. Below that, there are fields for 'Type' (set to 'Medicare and Health Fund'), 'Last Medicare Check' (set to '30/12/2019'), 'Last Health Fund Check' (set to '30/12/2019'), 'As at' (set to '21/04/2020'), and a green 'Check' button.

**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:

Concession Entitlement	CEV
Health Fund	PVF
Medicare	PVM
Medicare and Health Fund	OPV
Veterans – Card Number	PVV
Veterans – Personal Details	PVP
Medicare and Health Fund	

**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.

Check

Alternatively, you may also use a shortcut on your keyboard: **V**

## Outcomes of an Online Patient Verification

There are three main outcomes of an OPV.

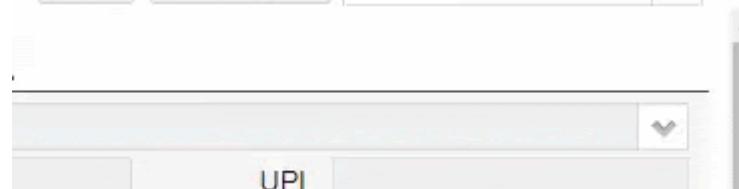
### 1. Successful

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

Medicare/DVA Details	
Medicare Number	2111-11111-1 ✓
Ref	1
Exp	
Health Fund	
Fund Name	NIB - NIB Health Funds Limited
Membership	123456789 ✓
UPI	0

### 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!

Total 0.00	Verification Issue
<a href="#">Edit</a> <a href="#">Bill Patient</a> <a href="#">More Actions</a>  	
	

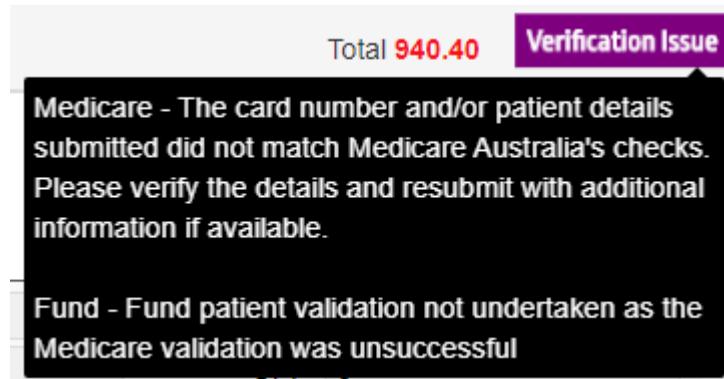
An issue like this means that the data Fydo has submitted to medicare was close enough to the correct details, that Medicare has gone ahead and provided us with the correct information.

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.