

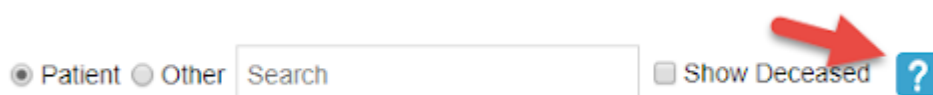
Searching for a Patient


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



☒ Patient ☐ Other ☐ 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 ☐ Show Deceased 

This will bring up a helpful menu like so:



☒ Patient ☐ Other 

Date of Birth : 19/11/1981
Name : Smith, Alan
MRN : 123

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

Patient:



☒ Patient ☐ Other 

Date of Birth : 19/11/1981
Name : Smith, Alan
MRN : 123

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:

☐ Patient ☒ Other Search

File # : 12345
Admission # : a:1001
Invoice # : Inv:123
Mobile : 0415 123 123
Medicare : 2111-11111-1

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**

Patient Details	Other	Appointments	Recalls	Account	Episodes	Communications
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 #**

Inv# ↑	Date of Service	Doctor
12573	25/08/2014	

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**

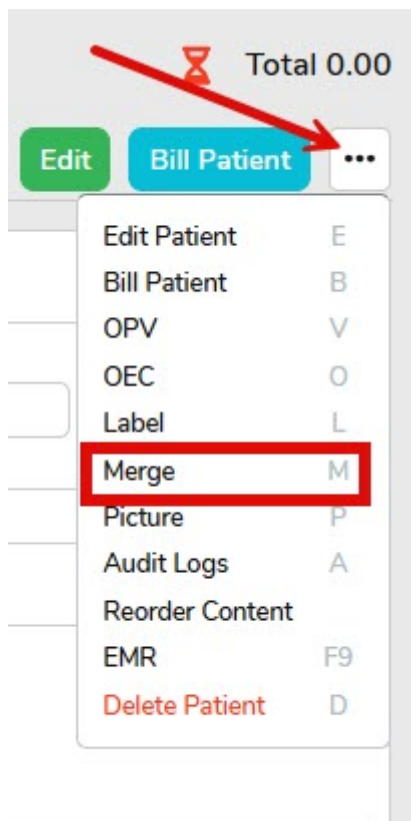
If you enter just the first and last name, it will not try to find similar patients, you do need to enter the date of birth for the check to occur.

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.

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

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

CancelMerge 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

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**

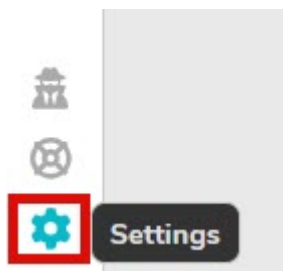
OK

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

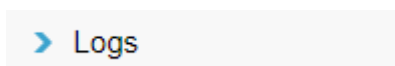
The Audit Log

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	

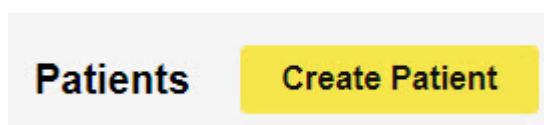
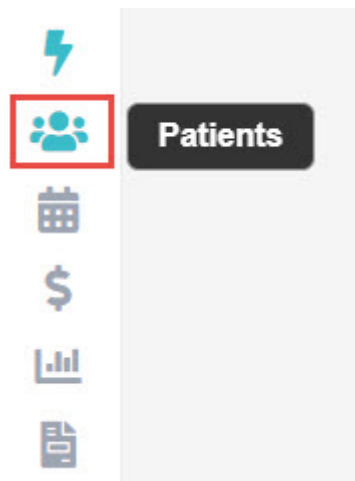
This screen shows us some important information such as:

- **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.

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		External ID	
Title	Mr	Gender	Male		
First Name	John			Mi	
Last Name	SMITH				
Pref. Name					
Address	123 ACSS Street				
Suburb	HOME BUSH	State	NSW	Postcode	2140
Mailing Address					
Suburb		State		Postcode	
Date of Birth	01/01/1990	Age	30	DOB Estimate	<input type="checkbox"/>
Mobile	0412-345-678	Home	(02)1234-5678	Work	() -
Email	John.Smith@test.com.au				

Medicare/DVA Details

Medicare Number	2111-11111-1	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
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
ADD REFERRING DOCTOR	
Referral Date	03/05/2020
Referral To	Search for a Referral To
<input type="checkbox"/> Site Referral (global) <input checked="" type="checkbox"/> Active	
ADD ANOTHER REFERRAL EDIT REFERRAL	

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

Type	<input type="text" value="GP"/>		
Speciality	<input type="text"/>		
Email	<input type="text" value="Test.Dr@test.com.au"/>		
Mobile	<input type="text" value="- -"/>		
Created On	<input type="text" value="26/03/2020"/>		
Birthdate	<input type="text" value="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

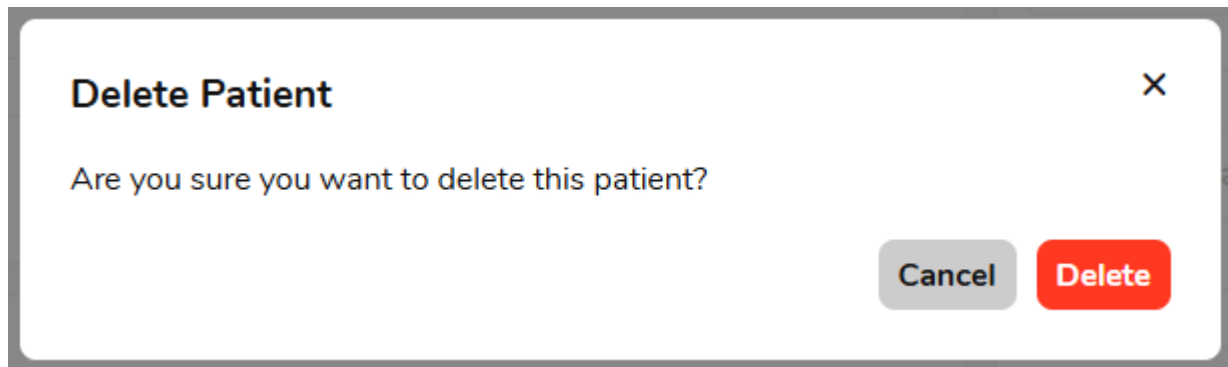
All done! We have created our first patient.

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

Deleting a Patient

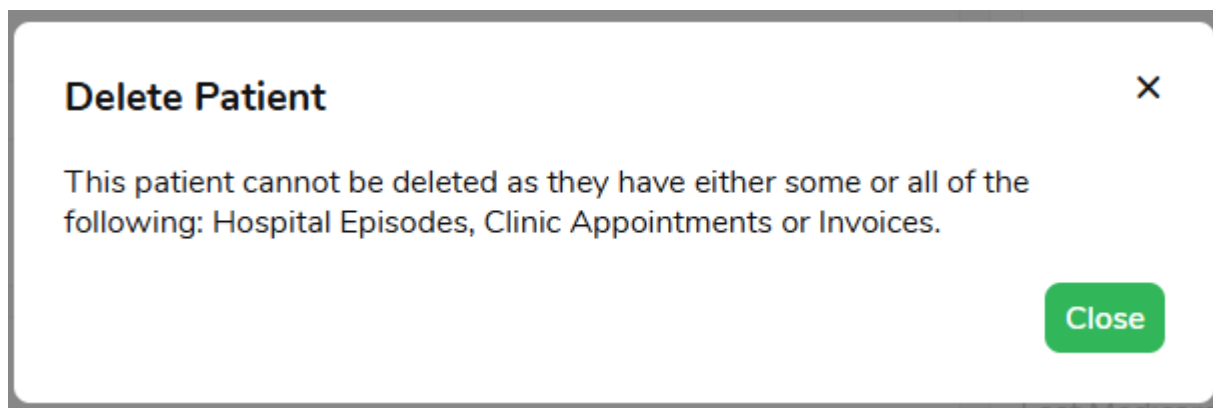
From the **Patient Screen**, select the more actions drop down, then **Delete Patient**

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:

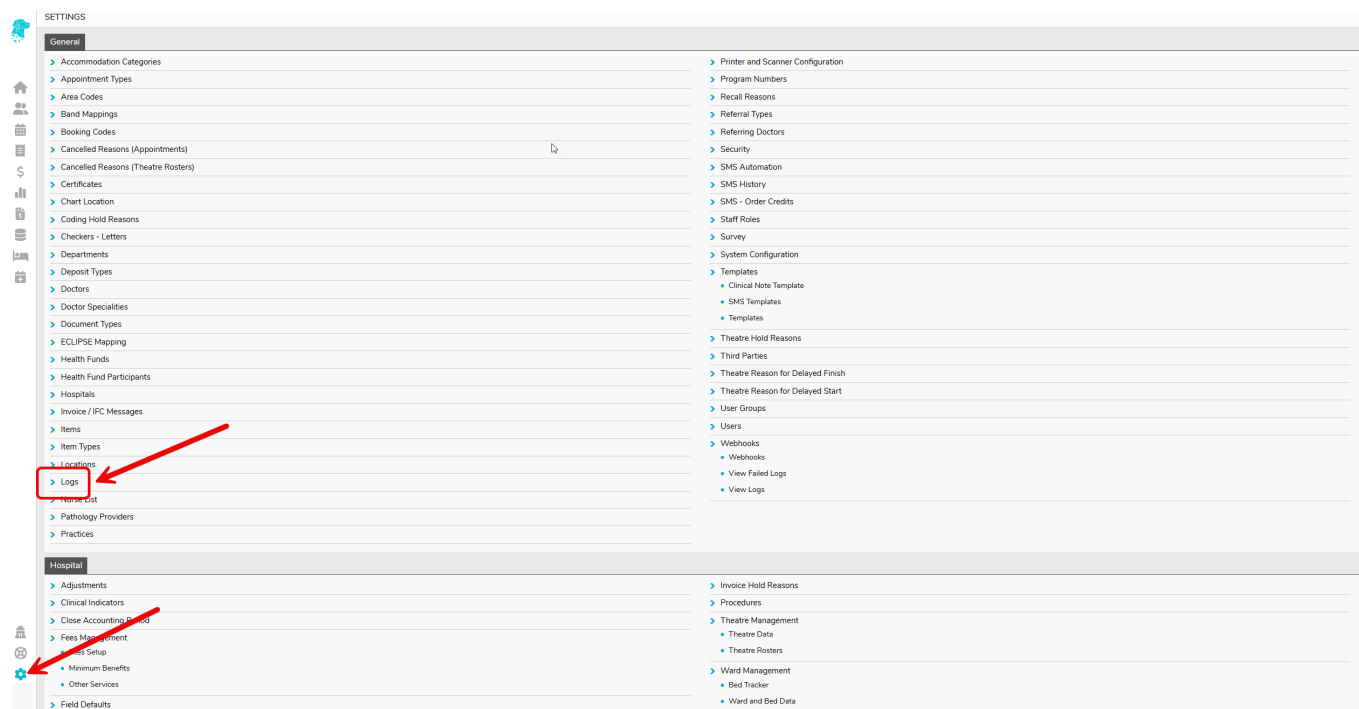
- **Outstanding Hospital Episodes**
- **Appointments**
- **Outstanding Invoices**

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

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
	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 screenshot shows the 'Eligibility Screen' form. It has a title bar 'Eligibility Screen'. Below it, there are two main sections. The first section has a 'Type' dropdown menu set to 'Medicare and Health Fund', an 'As at' date field set to '21/04/2020', and a calendar icon. The second section has two date fields: 'Last Medicare Check' and 'Last Health Fund Check', both showing a red date '30/12/2019'. Below these fields is 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:

The screenshot shows a dropdown menu with the following options: Concession Entitlement (CEV), Health Fund (PVF), Medicare (PVM), Medicare and Health Fund (OPV), Veterans – Card Number (PVV), and Veterans – Personal Details (PVP). The 'Health Fund' option is currently selected and highlighted in blue. Below the list is a search bar containing the text 'Medicare and Health Fund' and a dropdown arrow.

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!

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 0.00	Verification Issue	
Edit	Bill Patient	More Actions
UPI		

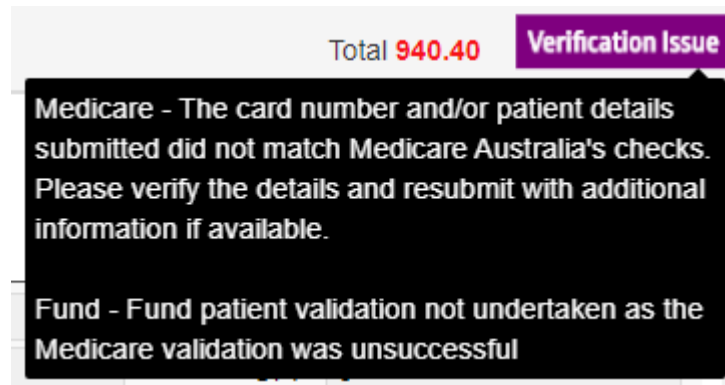
An issue like this means that the data Fydo has submitted to medicare was close enough to the correct details, that Medicare has gone ahead and provided us with the correct information.

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.