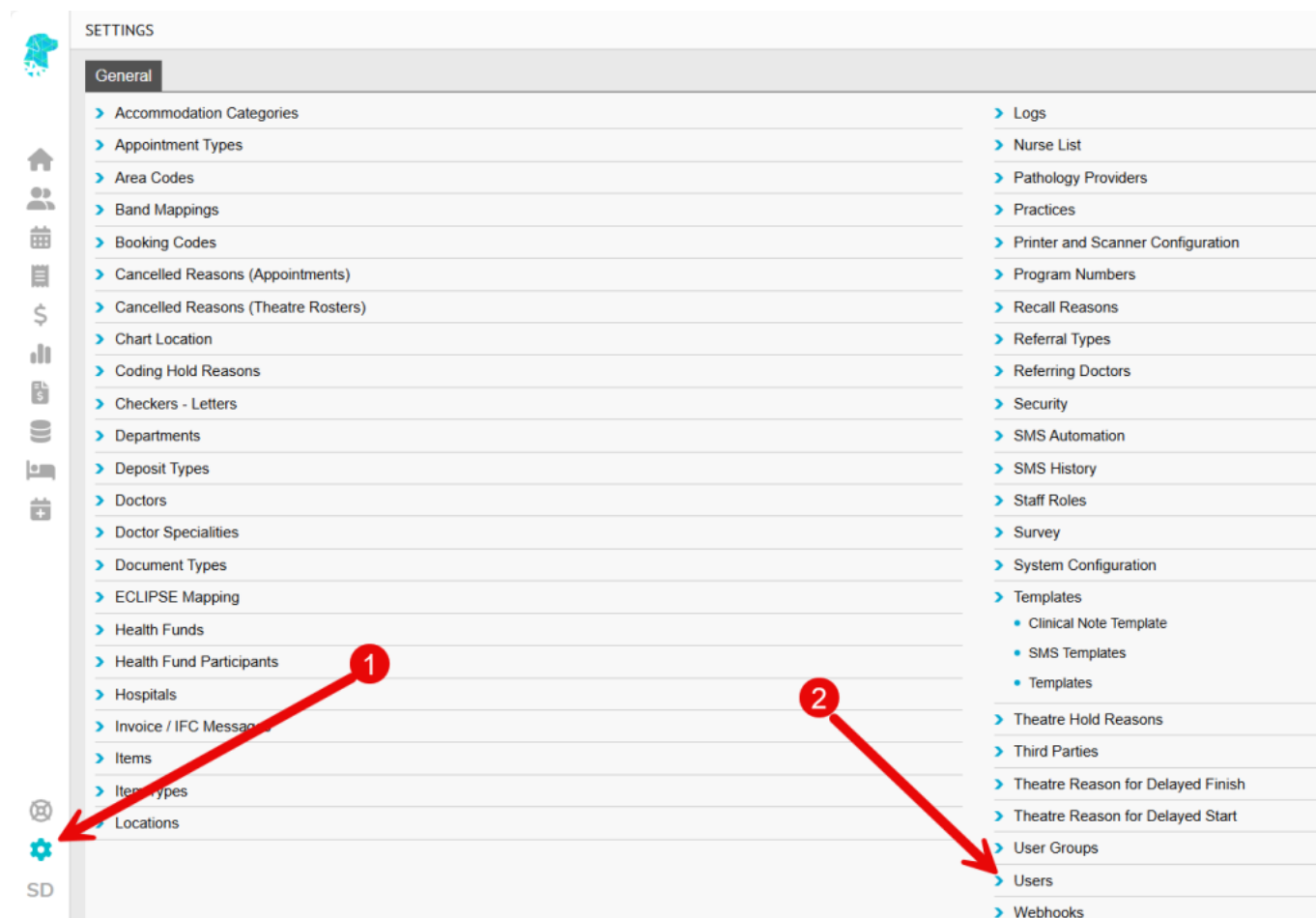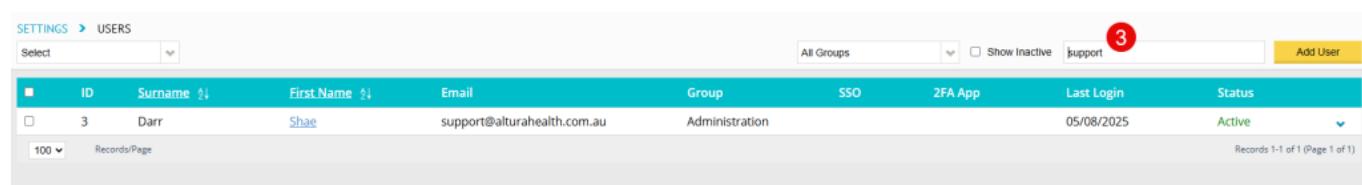# Deactivating a User

When users no longer require access to FYDO, they can be deactivated in the system.

1. Select **Settings**
2. Click **Users**

3. **Search** for the required user and **Double Click** on their name

4. Click **Edit**
5. Untick the **Active** box
6. Click **Save**

7. Inactive users can always be viewed by utilising the **Show Inactive** option

8. Inactive users will be identified with an **Inactive Status**

Adding Procedures and Procedure Defaults (Hospital)

Adding bookings into FYDO is quick and straightforward – particularly when **Procedure Notes Defaults** are set up correctly.
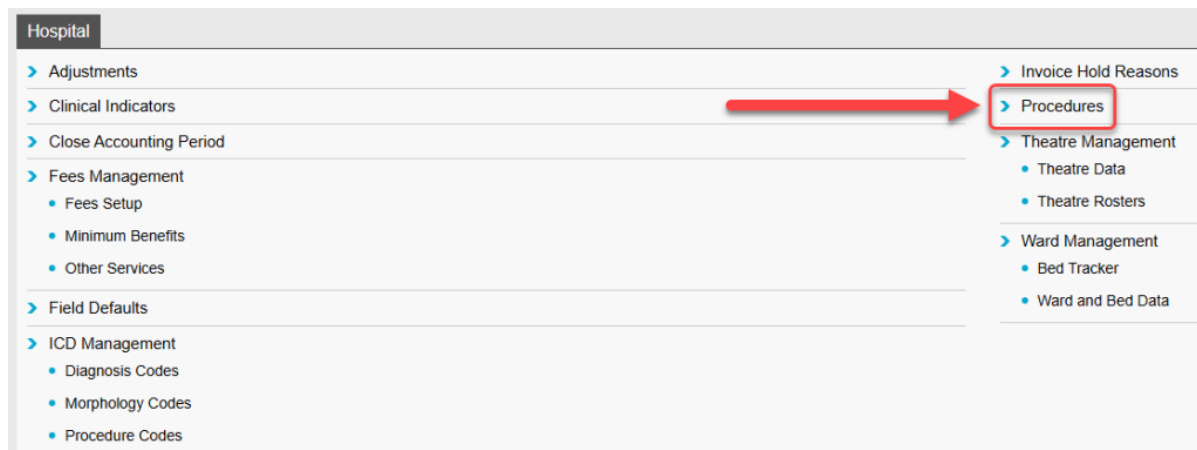
This feature enables facilities to automatically populate multiple fields on the **Edit Appointment Screen** based on the selected procedure.

The following instructions will guide you through setting up procedures to streamline the booking process and reduce manual data entry, saving time and minimising the risk of errors.
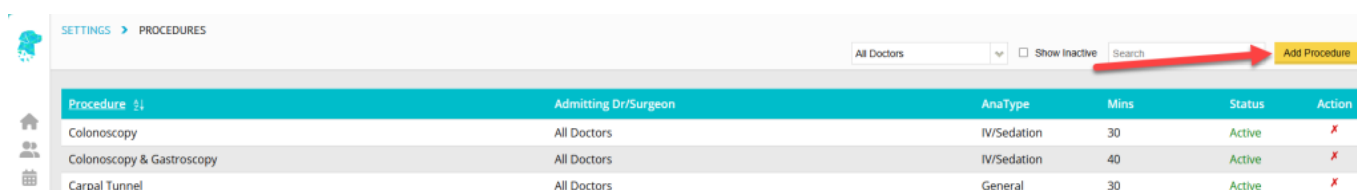
Go to **Settings**
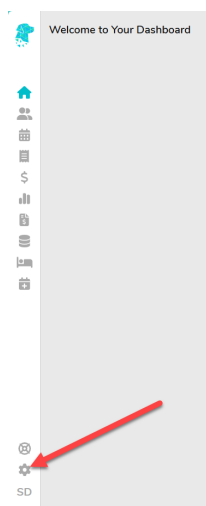
Select **Procedures**

Click **Add Procedure**

1. Complete the **Procedure Name** – This will appear in the **Procedure Notes** dropdown on the **Edit Appointment Screen.**

2. Select an **Anaesthetic Type –** Choose the anaesthetic type that applies to the procedure.
3. Enter the **Minutes** – This sets the default appointment length for the procedure.
4. Assign a **Doctor**– Select the doctor(s) who perform the procedure.

5. Select the **Booking Code 1** – Use this if you'd like to default the primary booking code, especially helpful for sites integrating with an EMR.
6. Select the **Booking Code 2** – Add a secondary booking code if required.
7. Add **Items** – As you add each item, a new line will appear to allow entry of multiple items relevant to the procedure.
8. Add **Other Services** – If the procedure involves protheses or other quotable services, enter them here. As with items above, a new line will display with each entry, allowing multiple codes to be added as needed.
9. Click **Save.**

Procedures will now be listed in the **Procedure Notes** on the **Make and Edit Appointment Screens.**
Procedures that are specifically linked to the doctor that is selected, will also be identified.

Once a selection is made, you will notice that all pre-set defaults will populate on the screen. Allowing staff to simply complete ONE field, instead of having to enter the data in to ALL THOSE FIELDS!

For assistance with setting up Procedures to better suit your facilities workflow, contact our friendly support staff:

Email: support@alturahealth.com.au
Phone: (02) 9632 0026

Updating a Username

There may be instances when a user needs to change their name in FYDO. This can be done by the user themselves, by following the steps below.

1. Hover over **User Profile** *(Your Initials)*
2. Select **Edit Profile**
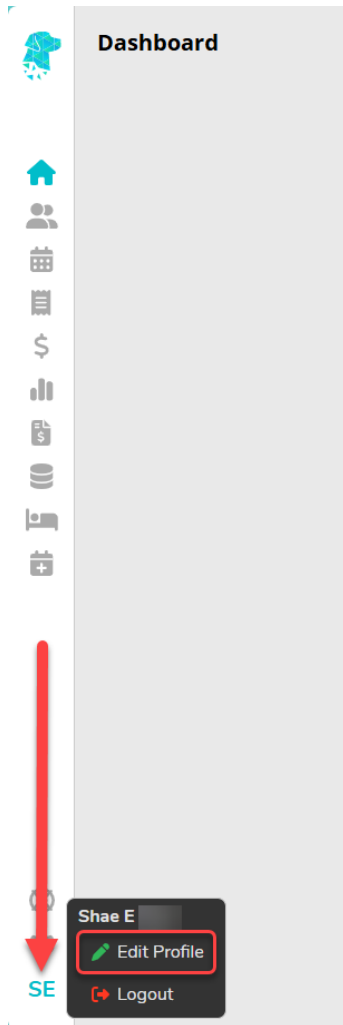
3. While on the **User Details** tab, select **Edit**
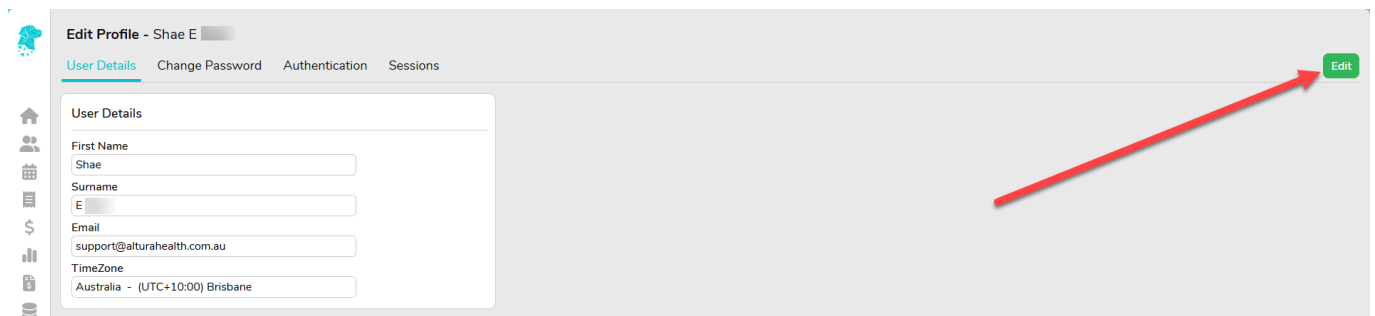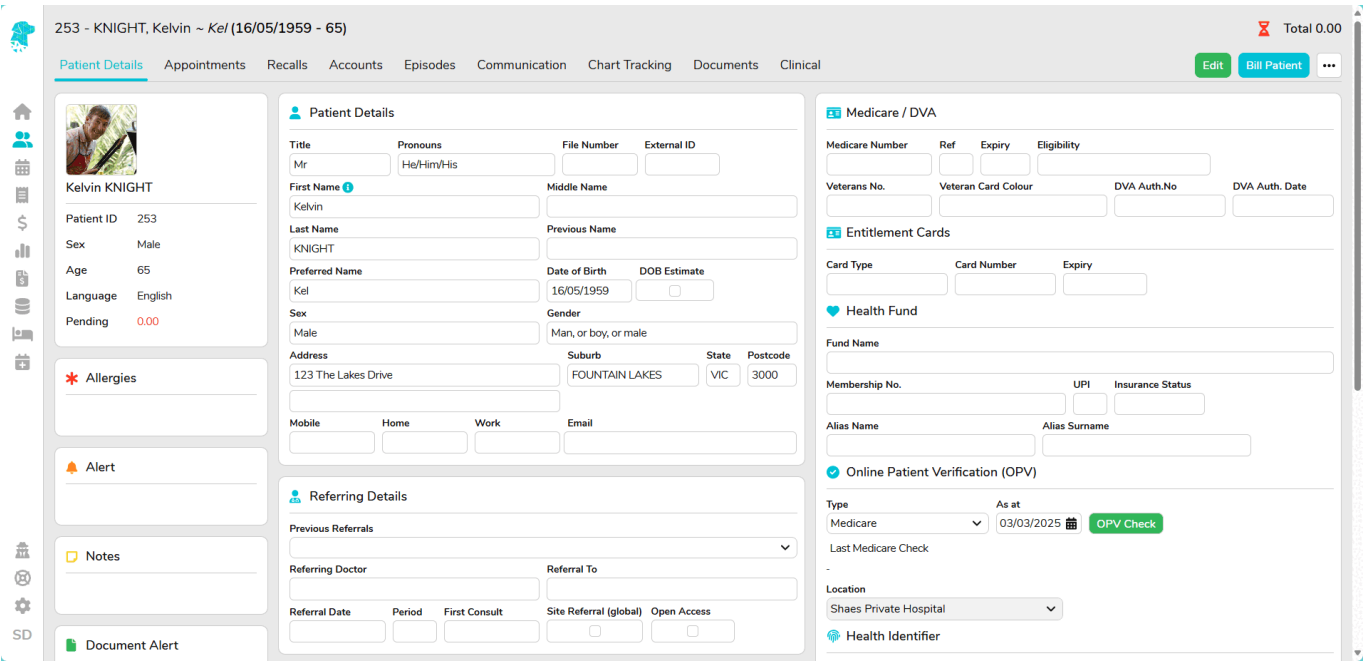
4. Amend the required **First Name** or **Surname** fields
5. Click **Save**
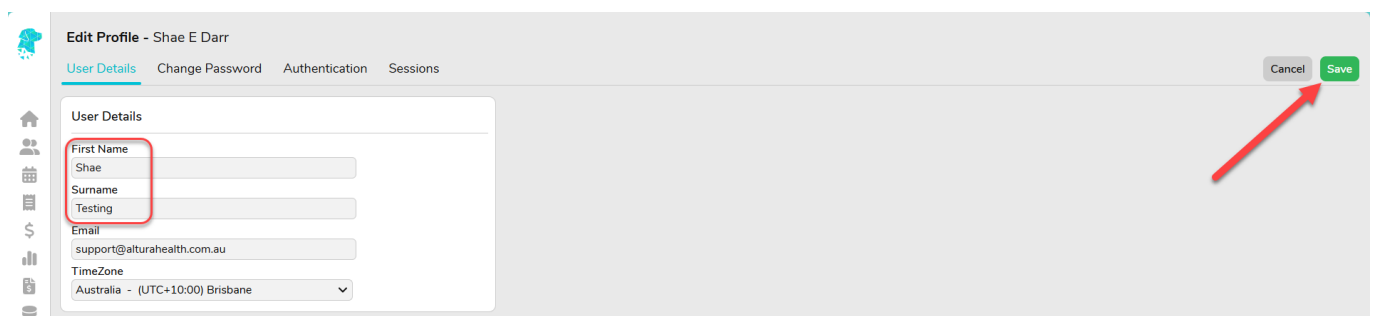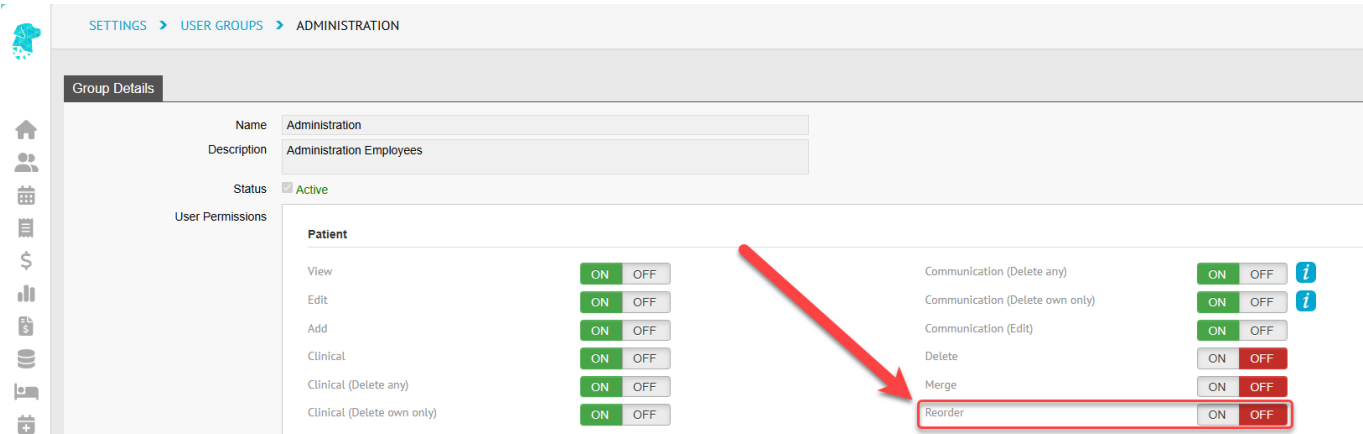
Re-Order Patient Screen

Users can customise the **Patient Screen** and display the details that are most relevant to them!

Access to this feature is managed at the User Group level, via **Settings > User Groups**, by amending the option under **Patient** for **Reorder.**

Users with the appropriate access levels can customise the layout of the patient screen by navigating to any patient and selecting **Reorder Content** from the **Menu** in the top-right corner.

This allows users to choose which groups of information are visible and hide irrelevant details using the eye icon.

Information groups can also be **Reordered** by dragging them to the appropriate spot. The layout can be displayed across two columns or condense it into a single column if needed.
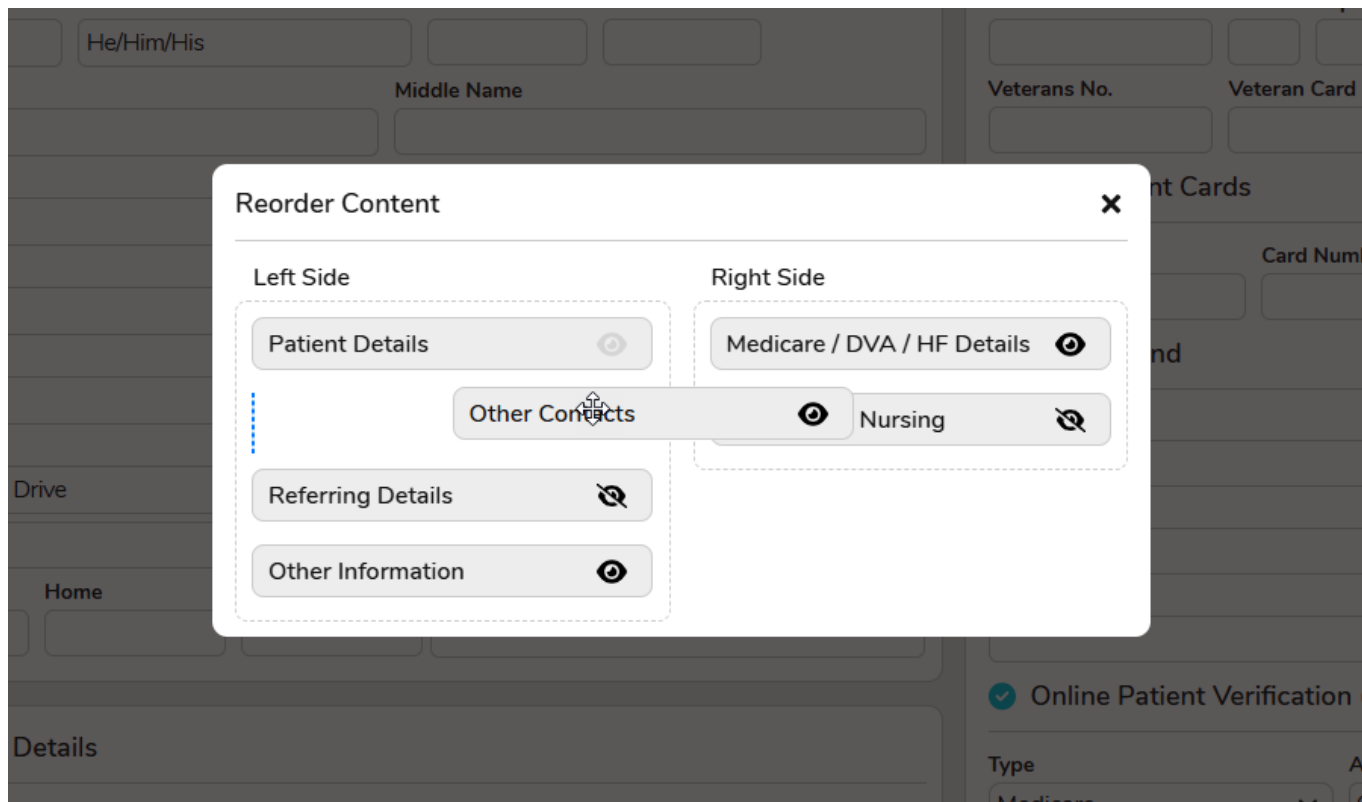
Once the desired order has been selected, click **Save Order** and the view will be displayed whenever the **Patient Screen** is opened.
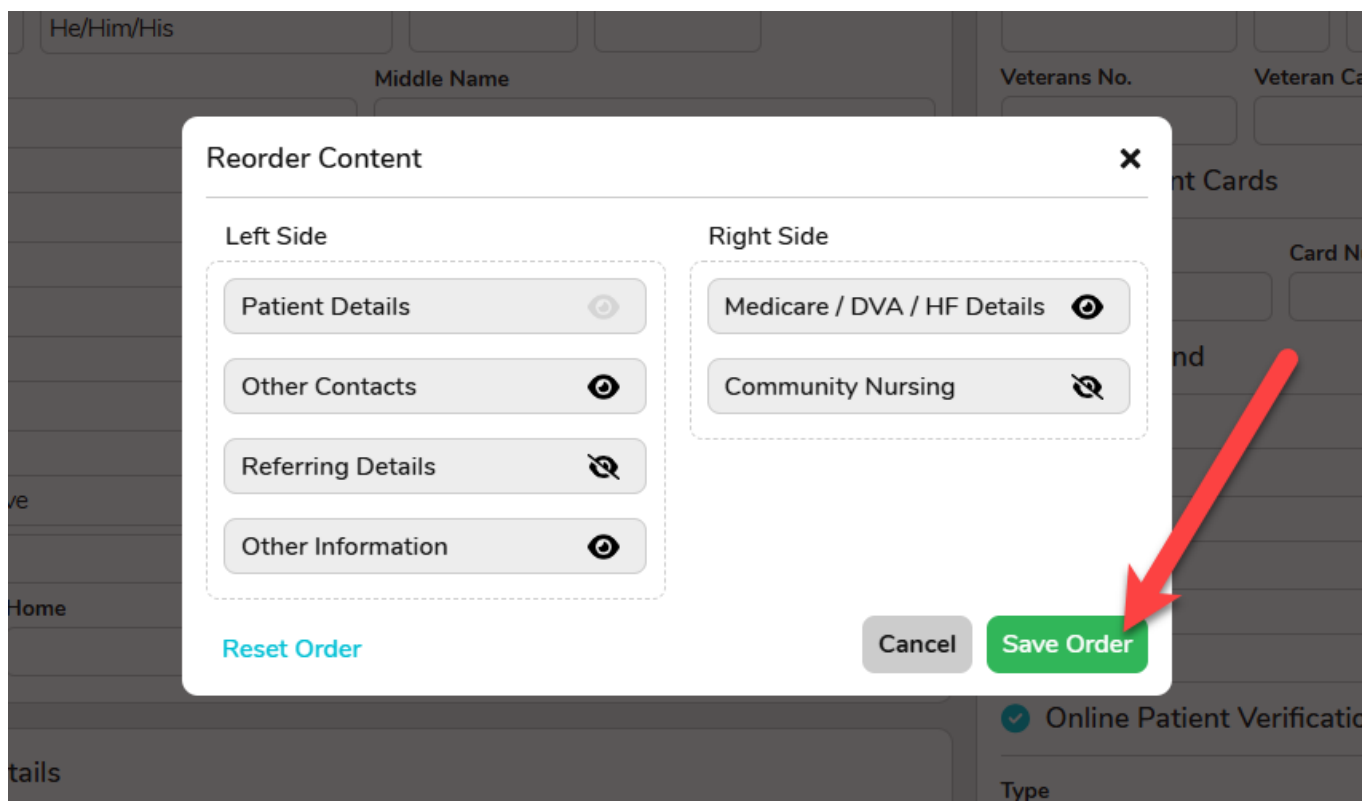
Adding or Editing Doctors – Hospital

Adding Doctors or Surgeons to FYDO can be easily done by a user that has the required access level.

1. Navigate to **Settings**
2. Select **Doctors**
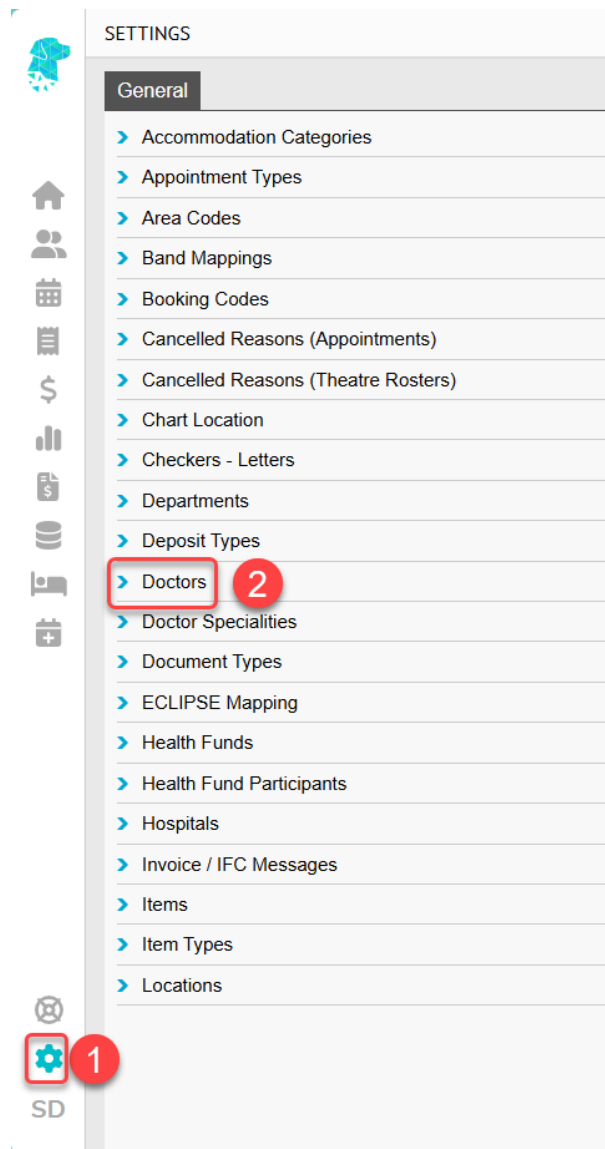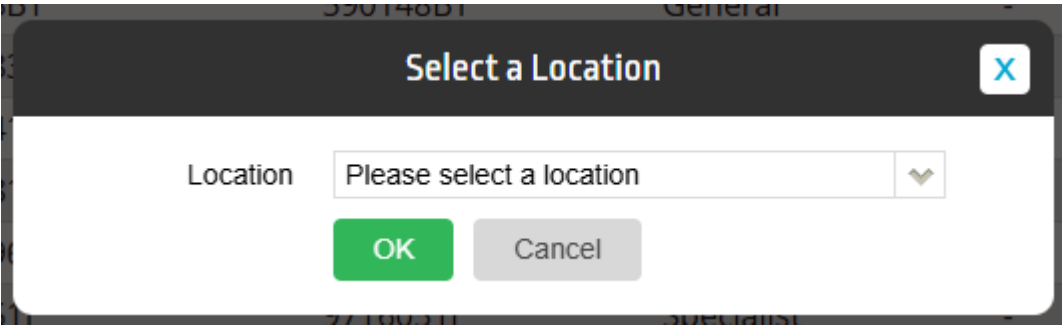
3. Use the **Search** field to find a specific doctor
4. To **Edit** a doctor already entered, simply **double click** on their line
5. To **Add** a new doctor select **Add Doctor**
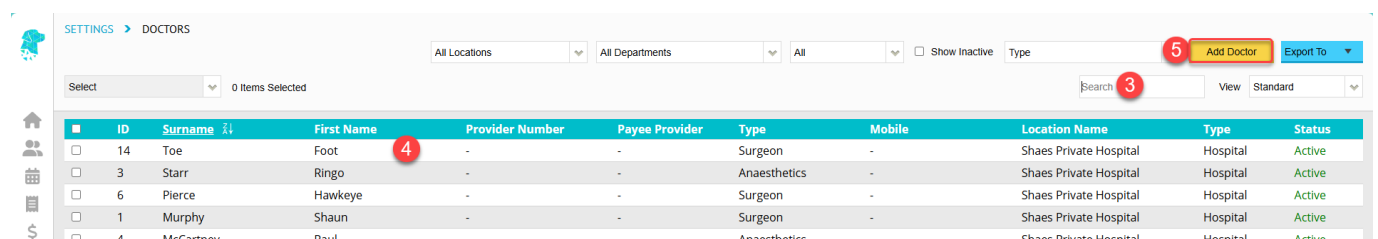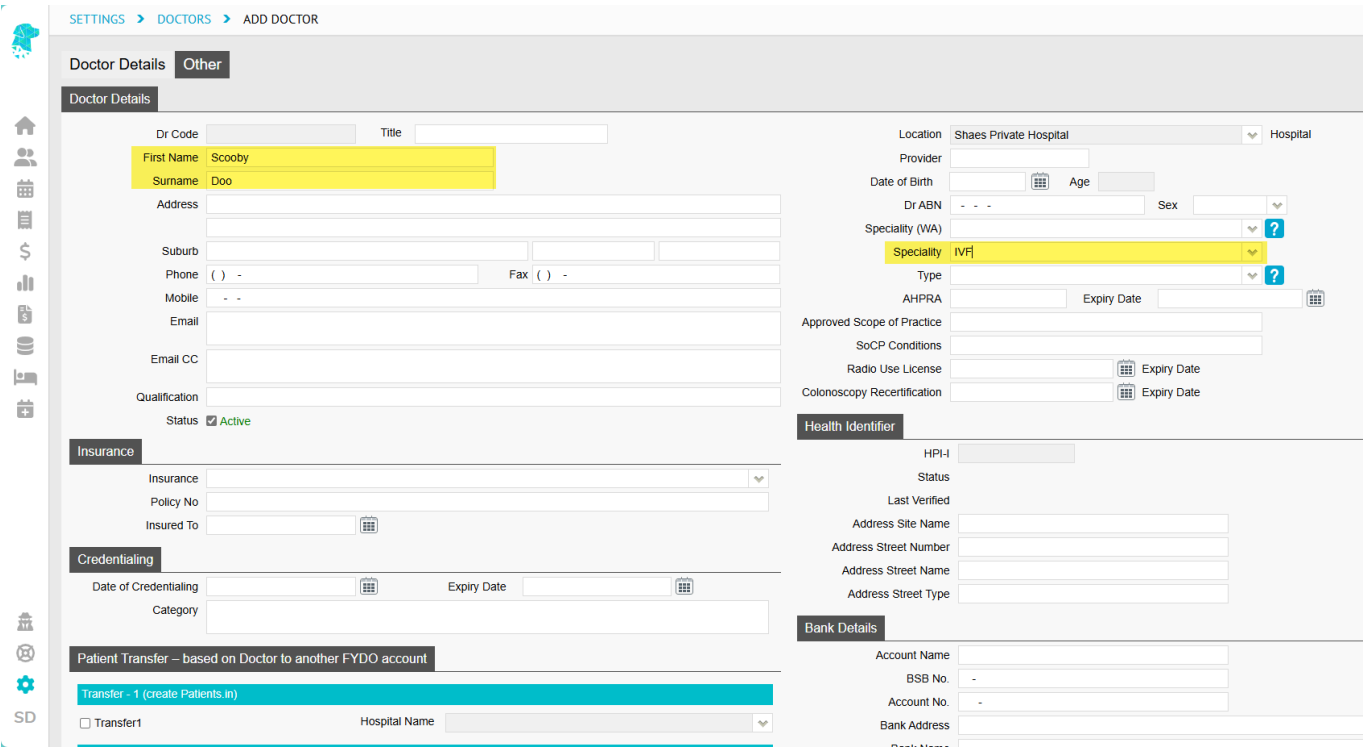
6. For **multi-location** databases, you will be required to select the **Location** that the doctor is to be

added to.
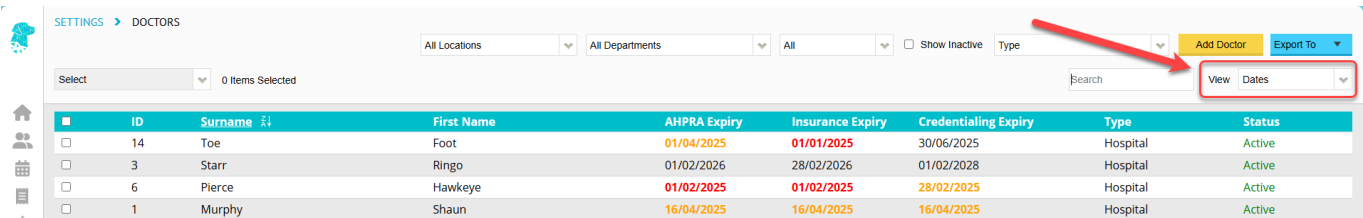
7. Minimum details required to add a doctor are **First Name, Surname** and **Speciality.**

8. Add in as much information as you would like. *Provider numbers can be required for data extract and claiming purposes.*

9. Doctors assigned the **Speciality** of **Anaesthetics** will be displayed in the **Anaesthetist** field throughout FYDO and won't be admitting doctors.

10. All other Specialties *(including customised ones, added by the facility)* will be included in the **Doctor/Surgeon** dropdowns in FYDO.
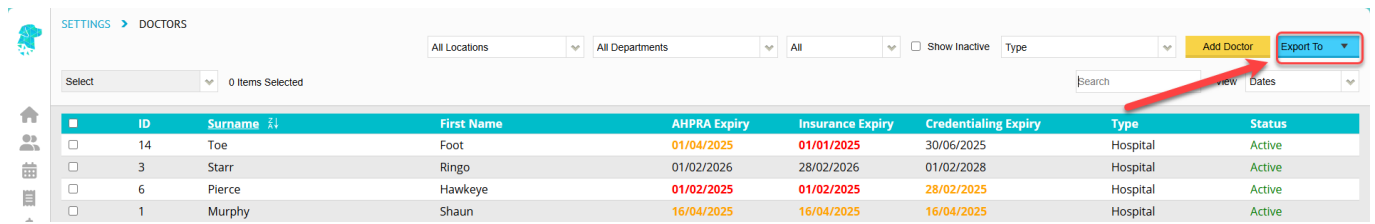
FYDO gives the option to view all the doctors expiry dates for **AHPRA, Insurance** and **Credentailing**. These dates can by displayed by selecting **View > Dates.** These dates are colour coded to allow easy identification if they are expiring soon:

–

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– Black Date > Not due to expire for over 3 months

Users are able to export the Doctors List to Excel or PDF if required.

SMS Automation in FYDO

Stay connected with your patients effortlessly with the new **Automated SMS** feature in FYDO!
This feature allows you to automatically send SMSs to patients before and after their admissions, at timeframes that work for you!
– Need to send patients their admission times? Done.
– Need to remind patients to complete their Admission Form? No problem.
– Want to send a Post-Discharge follow-up or request feedback via a Patient Survey? It's all possible!

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To start using the **Automated SMS** feature, here's what you'll need to have in place:

- **An SMS Account:** You'll need an SMS account set up in FYDO. If you're not sure whether you already have one, contact our team.
- **SMS Templates:** You'll need to set up SMS Templates. Detailed instructions are available on our Adding SMS templates – FYDO Wiki
- **SMS Automation:** Once your templates are ready, you'll need to set up SMS Automation in the FYDO Settings. Let's walk through that now!

1. Navigate to **Settings**
2. Select **SMS Automation**
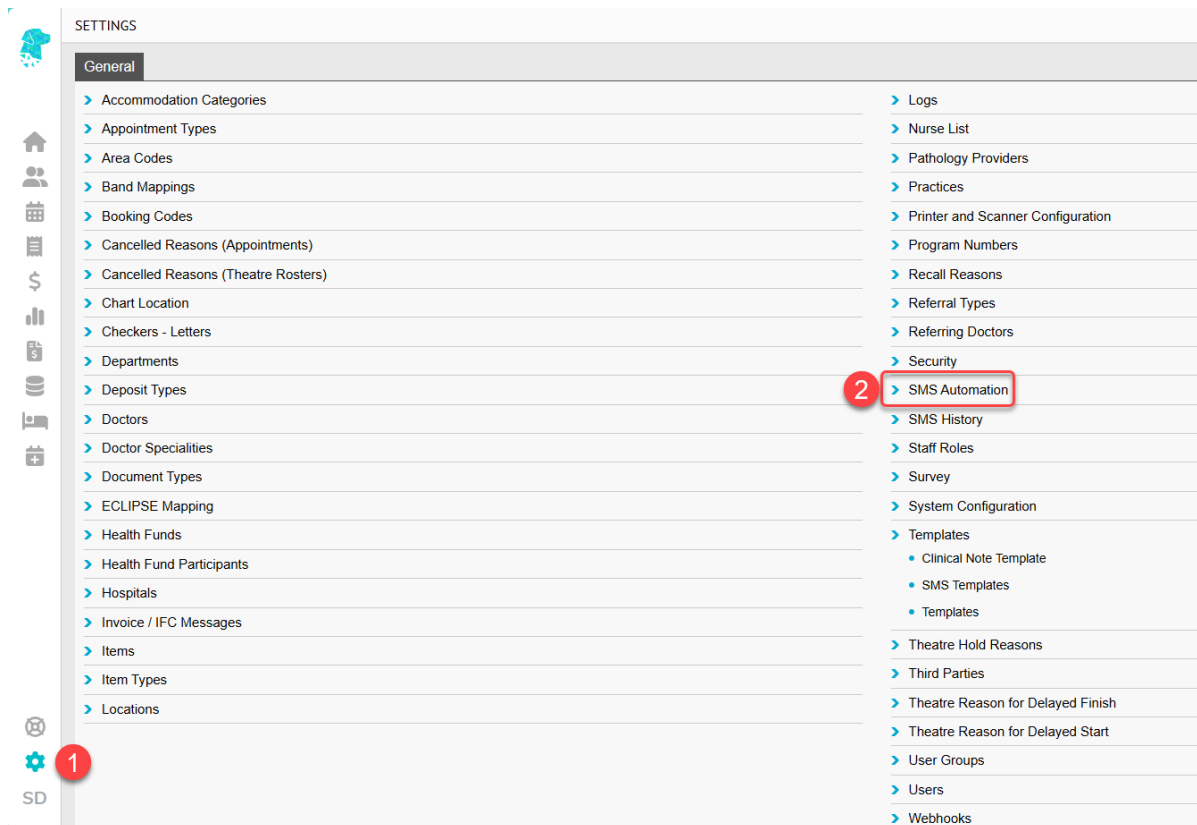
3. Click **Add SMS Automation**
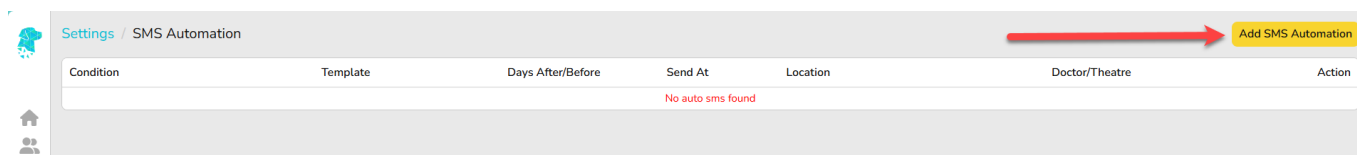
4. Select the **Condition.** *(We will go into detail on each of the **Conditions** later in the instructions and explain what field in FYDO governs their status)*

5. Select the required **Template**

6. Select the **Number of Days Before** or **After** the episode that you'd like the SMS to be sent

7. Select the **Time** that you'd like the SMS sent

8. Select the **Location** for Multi-Location databases. *(Single location databases will not need to amend this field)*

9. Select the specific **Theatre** if this Automated SMS is only going to apply to one. Otherwise leave the selection as **All Theatres**

10. Click **Setup Auto SMS**

To Confirm Appointment

This type of SMS automation is triggered by the **Confirmed** field in the **Edit Appointment Screen** of each episode. When the Automated SMS Condition is set to **To Confirm Appointment** this field will be checked before sending, to ensure the message is only sent to appointments that haven't been confirmed yet.

For example, the automated SMS feature will check for appointments scheduled in the next two days that haven't been confirmed. It will send the selected SMS template at 9am.

For the below example, let's say today is Monday:

- The system will check all appointments scheduled for Wednesday and send the SMS to those without an entry in the **Confirmed** field.
- FYDO will also scan for any late additions to appointments within the two-day window to ensure these patients also receive the SMS.

Post Discharge

This SMS automation is based on the **Discharge Date.** Once an episode is discharged, the SMS will be sent at the designated timeframe **after** the discharge date.

For example, if today is Monday and a patient is discharged at 1pm, they will receive the automated **Post Discharge SMS** one day after their discharge date. In this case, the SMS will be sent on Tuesday at 9am.

Admission Form Not Received

This automated SMS is triggered based on the **Admission Form Received** Check List item. If the checkbox is marked for a patient's admission, they will not receive the automated SMS. This means the SMS will only be sent to patients who have not yet completed their admission form!

With the check box now automatically ticked when patients completed Online Preadmit Paperwork is committed, following up with patients who still need to complete this task has never been easier!

For the below example, if a patient is booked for Monday, they will receive their **Admission Form Not Received** reminder on Sunday at 8am, the day before their scheduled admission.

Keep in mind, you can set up **multiple SMS Automations**! So, if you want to remind patients every day until they submit their admission form, you can easily do that!

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Let's look at a demo setup for streamlining patient communication! Automating these SMS reminders can really help improve patient engagement and reduce the administrative burden on staff. Here's an example of how it can work and why it's effective:

1. **Online Pre-Admission Form Link (4 days before admission)**
   This gives patients a head start in completing their required paperwork. The fact that it only contacts those who haven't already submitted the form is a great way to avoid unnecessary follow-ups and potential annoyance for patients who are already on top of their forms.
2. **Follow-Up Reminder for Admission Forms (2 days before admission)**
   A reminder just before the deadline to submit the form ensures that those who missed the first notification get another nudge, but again, it avoids bothering anyone who's already completed the form. A gentle follow-up can help improve compliance.

3. **Pre-Procedure Confirmation (1 day before admission)**
   This is crucial for making sure patients are prepared with all the details – admission time, fasting instructions, what to do when they arrive, and appointment confirmation. It helps patients feel more confident and organized the day before their procedure.
4. **Post-Discharge Check-In (1 day after discharge)**
   Checking in on patients after they leave the hospital can show that you care about their recovery, making them feel supported and giving you an opportunity to catch any concerns early. Helping you meet your post-discharge obligations.
5. **Patient Survey Link (5 days post-discharge)**
   Asking for feedback via a patient survey is a great way to gather insights on their experience and identify any areas for improvement. Giving them a little time to settle into their recovery before asking for feedback might result in more thoughtful responses. Automating this follow up ensures all patients are given the opportunity to participate in providing feedback.
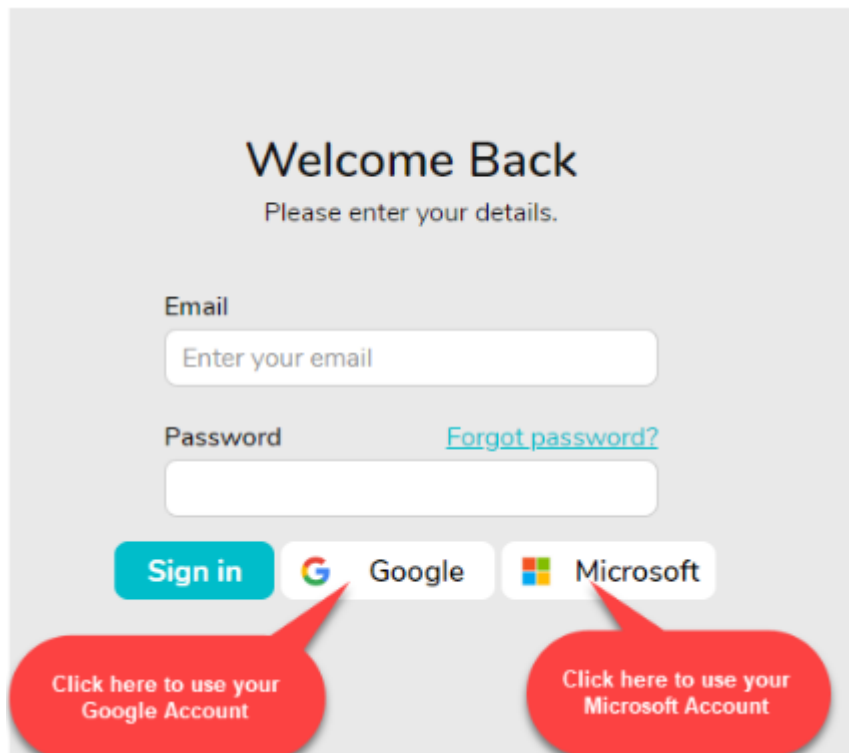
Single Sign On (SSO) with FYDO

At FYDO, we are committed to continuously enhancing the security and convenience of our platform for our valued customers. And because of that, we use Single Sign On (SSO) to FYDO! This feature will allow you to access FYDO using your existing credentials from Microsoft or Google, simplifying your login process while maintaining the highest level of security.

SSO is a secure authentication process that enables you to log in to multiple applications with a single set of credentials. By integrating SSO, we aim to provide you with a seamless and efficient log in experience.

When you log in, you will notice two buttons for Microsoft and Google account access, as pictured below.

If you are already logged into your browser with either a Google or Microsoft account, you can click on the applicable button to log in. This will take you directly to the FYDO dashboard or the Two-Step Verification Process via SMS, email, or an Authentication App as usual.

Note– The account you use must already be set up in FYDO to proceed.

If you are not already logged into your browser with an account, you will be prompted to **'Pick an account'** or **'Use another account'** as shown below. You will need to enter your password to proceed.
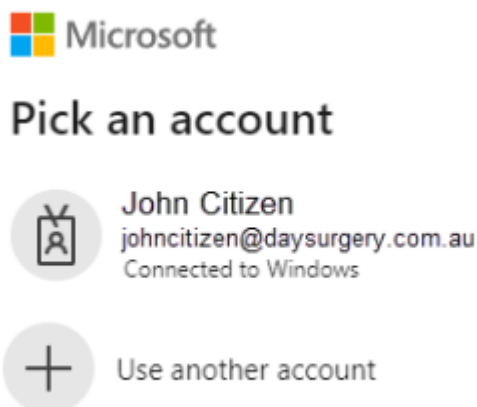
You may still use your email and password to log in unless your FYDO account subscriber has forced SSO to be used. In that case, you may receive a message at the top of the screen, as shown:
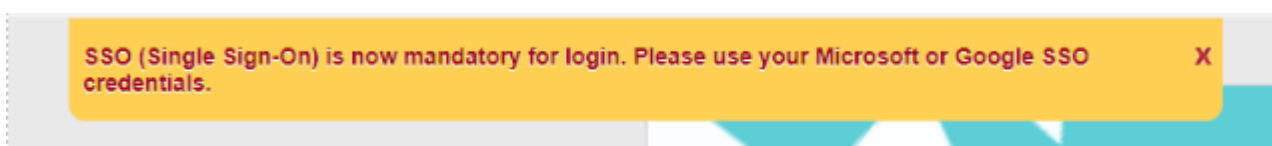
If you receive the message above, please try using the Microsoft or Google buttons. If you still have

problems logging in, **contact your FYDO account subscriber** *(the person in charge of FYDO at your facility)* before reaching out to Altura Health Support.

If you have forgotten your Microsoft or Google password, please contact your IT department. This issue is separate from FYDO and cannot be addressed by Altura Health Support.

How to enforce SSO in FYDO

SSO authentication can be enforced for all or selected users. Once SSO is enforced, an email invitation will be sent to the applicable user/s,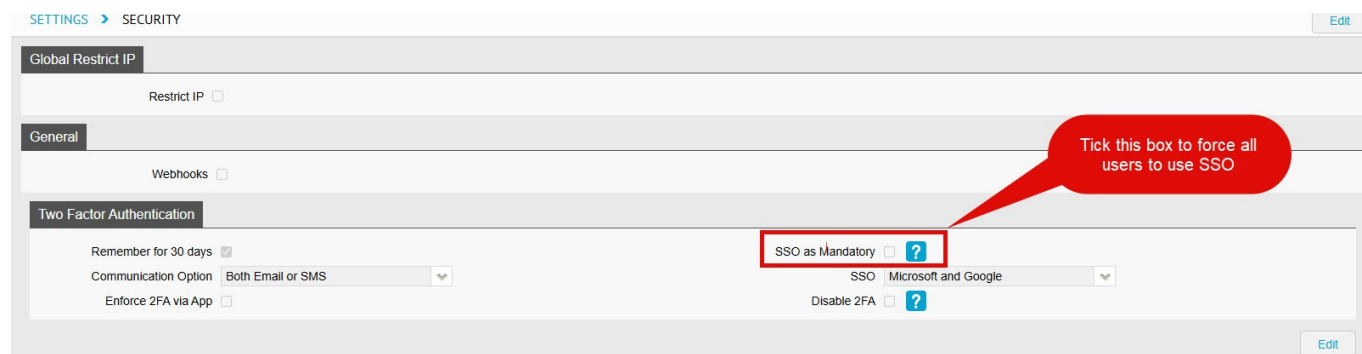 advising them to activate their account via SSO. The user does not need to use the email invitation link; they can go directly to the FYDO website.

Note: Once a user is required to use SSO by their facility, their existing password will be deleted.

To enforce SSO for all users:

1. Go to **Settings > Security** and click **Edit**.

2. Tick the **SSO as Mandatory** tick box (as shown below) and click **Save**.

If, for any reason, some users are unable to authenticate using SSO, they can be reverted back to the standard email/password authentication method.

To revert all users to email/password authentication:

1. Simply untick the **SSO as Mandatory** box in **Settings > Security.**

To revert specific users to email/password authentication:

1. Go to **Settings > Users**
2. Double-click on required user
3. Click **Edit**
4. Untick **SSO Mandatory**

5. Click **Save**

Reverted users will receive another email invitation to set up their new password.

You can see which users have SSO enforced and whether they have successfully authenticated using SSO by going to **Settings > Users**.

|	Group	SSO	2FA App	Last Login
ealth.com	Subscriber			03/01/2024
@acsshealth.com	Test Group	✖		12/09/2023
@alturahealth.com.au	Full	✔		01/03/2024
:sshealth.com	Test Group	✖		-
urahealth.com.au	Test Group	✔	✔	21/05/2024

- **SSO Blank:** User not forced to use SSO
- **SSO Red Cross:** User forced to use SSO but not activated
- **SSO Green Tick:** User has activated SSO

Amending a User's Email Address

There may be instances when a user needs to change their FYDO log in email address. This can be done by the user themselves by following the steps below.
The only exception is the Subscriber who is unable to change their email address themselves & will need to contact FYDO Support if amendments need to be made.

1. Hover over **User Profile** *(Your Initials)*
2. Select **Edit Profile**
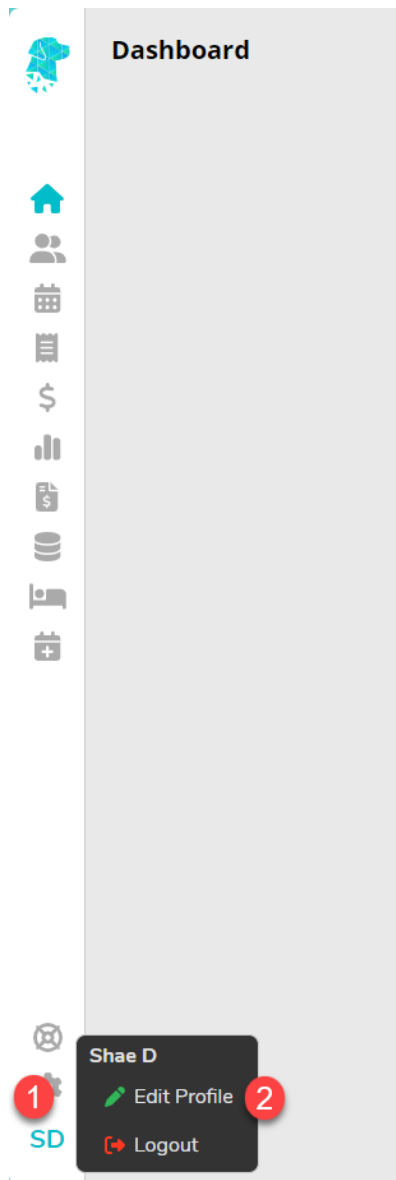
3. Select **Edit**
4. Amend **Email**
5. Click **Save**
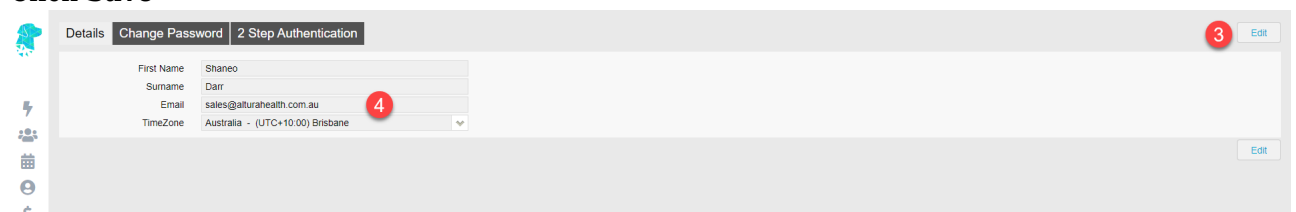
The new email address will need to be used for log ins from there on.

How to change user's timezone

Need to change your timezone? Read on to learn how!

Note: This setting is unique to the user. Therefore, each user will need to check their own timezone

settings.

1. Hover over the **profile icon** *(Your Initials)*
2. Click on **Edit Profile**.
3. Select **Edit**
4. Select the desired **TimeZone**.

Click **Save** and you're all done! You have successfully updated your TimeZone on *this profile*.

Resetting a Users Mobile Number

If a user needs to amend the mobile number, that is used for 2 step authentication, they can follow the instructions below.

Using the email option for 2 Step Authentication will allow you to received the code via email to be able to log in without the old mobile number. Once logged in you will be able to:
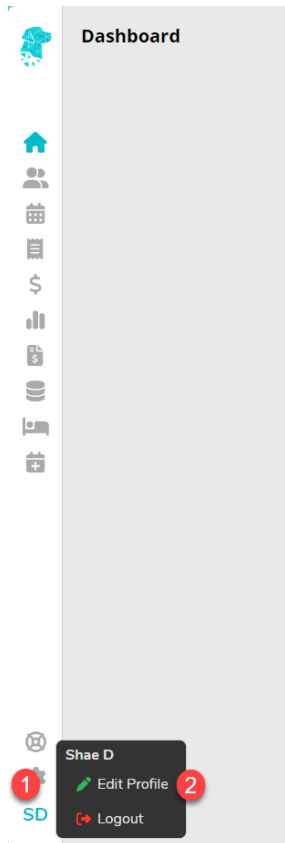
1. Hover over the **User** icon *(Your Initials)*
2. Select **Edit Profile**
3. Select **2 Step Authentication** tab
4. Click **Edit**
5. Select **Yes** to the question **Would you like to reset mobile?**
6. Click **Save**

The next time you log in you will be prompted to set a new mobile number.