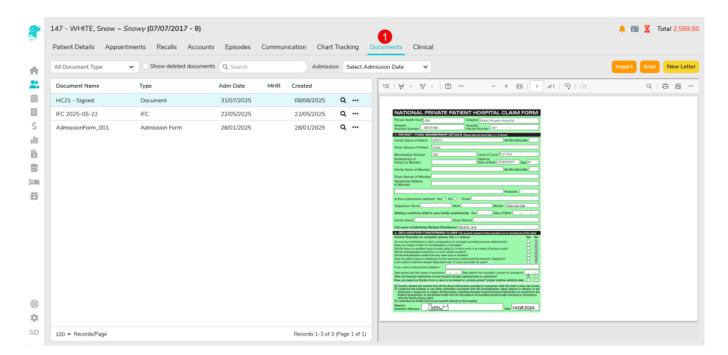
Combine Invoice & HC21 in One PDF

Have you ever needed to produce a single PDF for a health fund that includes the **Invoice**, **HC21 Left** signed by the patient AND **HC21 Right** signed by the hospital representative?

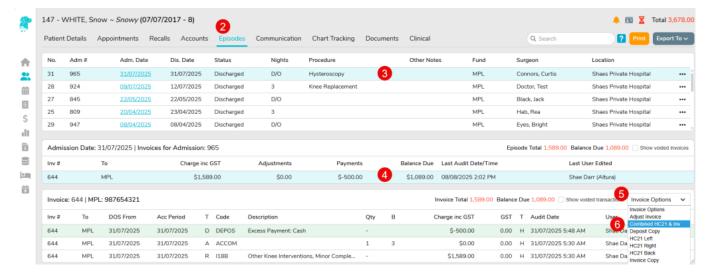
Maybe you even need to add a **Type C Certificate** into the file!

FYDO has made this process easy, with a feature that does it all for you! Follow the steps below to learn how.

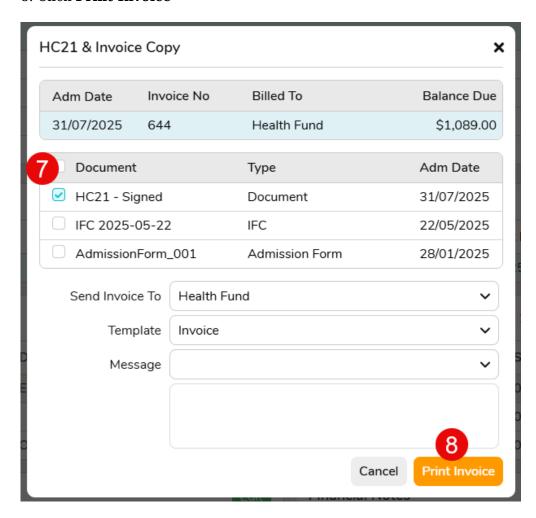
1. Upload a **completed HC21 Left** document to the patients **Documents** (or any document that needs to be included. e.g. Type C or Acute Care Certificate)



- 2. Navigate to **Episodes**
- 3. Ensure the correct **Episode** is selected
- 4. Ensure the correct **Invoice** is selected
- 5. Utilise the **Invoice Options** dropdown
- 6. Select Combined HC21 & Inv



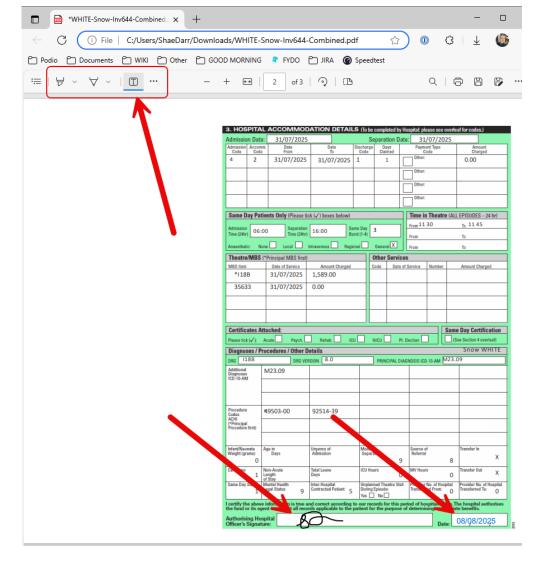
- 7. Select the **HC21 Left** document that you had previously loaded into the patients **Documents** in step 1. And any certificate that also need to be included in the single PDF file.
- 8. Click Print Invoice



FYDO will produce a **single PDF** that includes:

- Invoice
- HC21 Right
- **Documents** that were selected

The **HC21 Right** will need to have the **Authorising Hospital Officer's Signature** and **Date** added. Most PDF programs will allow this electronically.

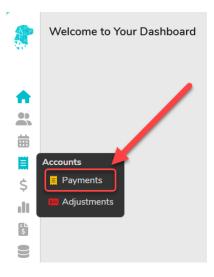


Save the document and submit to the health fund.

Receipt a Manual Hospital Remittance

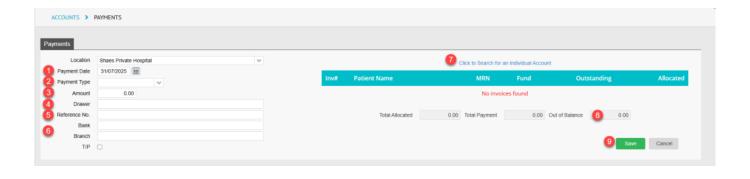
When health funds or companies pay for accounts with a manual remittance (*I.E it isn't electronic through ECLIPSE*) the payment still needs to be receipted in FYDO. These instructions will explain how to do that:

From the Accounts Tab, select Payments



Populate all required fields as per below:

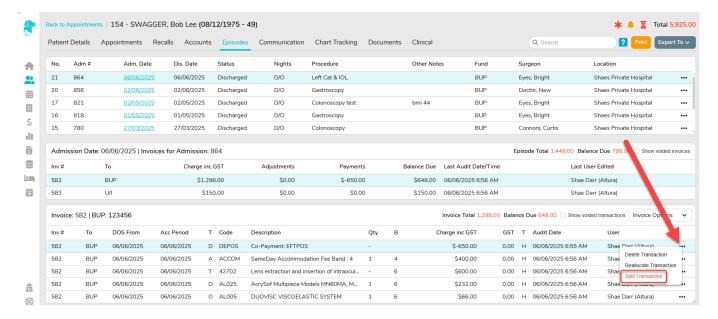
- 1. Ensure **Payment Date** is correct
- 2. Add **Payment Type**
- 3. Type **Amount** received
- 4. Document the **Drawer** who made the payment
- 5. Add a **Reference No.** if required
- 6. If payment is made via **Cheque**, add the **Bank** and **Branch**
- 7. Utilise **Click to Search for an Individual Account** to search for patients and manually add them to the payment.
- 8. Once all entries have been added, ensure the payment isn't Out of Balance
- 9. Click Save



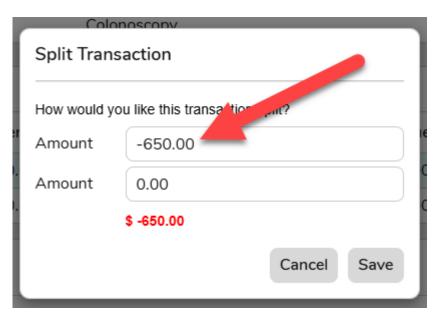
Split Transaction/Payment (Hospital)

If a payment has been receipted in one transaction but needs to be allocated to two separate invoice numbers or episodes, you can follow these instructions to "split" the payment into the two required amounts:

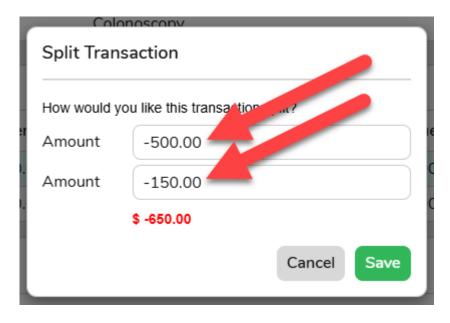
Navigate to the **Episodes Screen** and locate the payment that needs to be amended. Utilise the menu icon *(three dots on the transaction line)* to select **Split Transaction.**



A pop-up will appear, displaying the total amount of the original transaction in the top line.

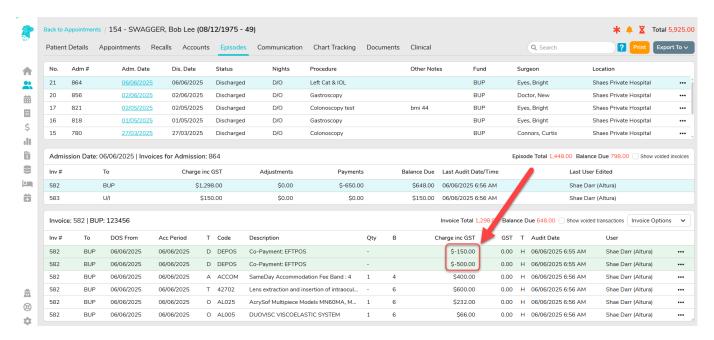


Enter the amount you wish to allocate to the **first receipt** in the top line. The **second Amount field** will automatically populate with the remaining balance.



Click Save.

The original transaction will now appear as two separate lines.



Please see our wiki page for instructions on how to **Reallocate the Transaction** to another invoice or episode for this patient.

Reallocate Transaction (Hospital)

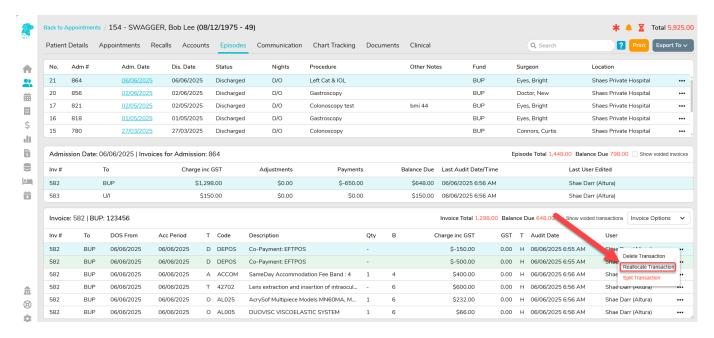
Reallocate a Transaction (Hospital)

In some instances, a payment may need to be reallocated to another invoice or episode for the patient.

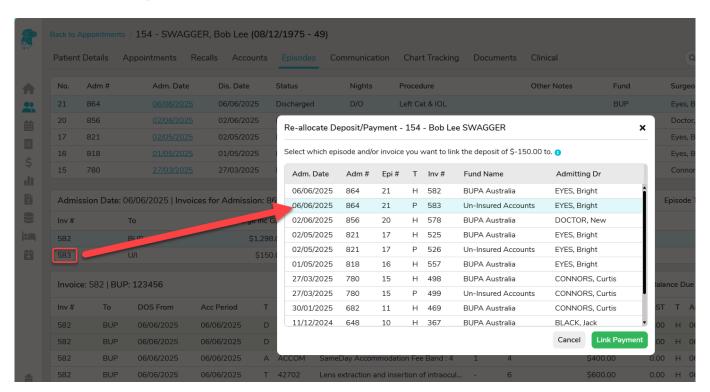
If the transaction needs to be split into two amounts before reallocation, please refer to our wiki page for instructions on how to **Split Transaction/Payment (Hospital).**

Split Transaction/Payment (Hospital)

To reallocate a payment, navigating to the **Episodes Screen** and locating the relevant payment. Utilise the menu icon *(three dots on the transaction line)* to select **Reallocate Transaction.**

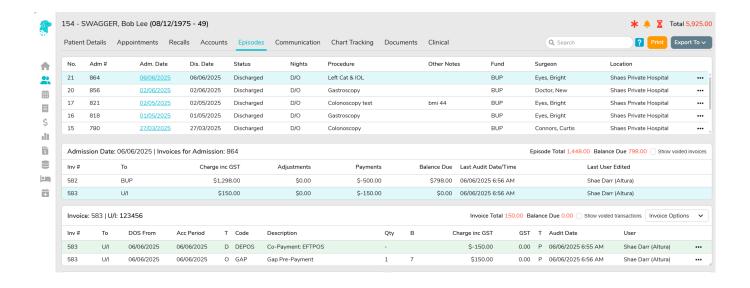


A pop-up will appear displaying all of the patient's other invoices across all admissions. This is particularly useful when reallocating a deposit from one episode to another – for example, in the case of a cancelled procedure.



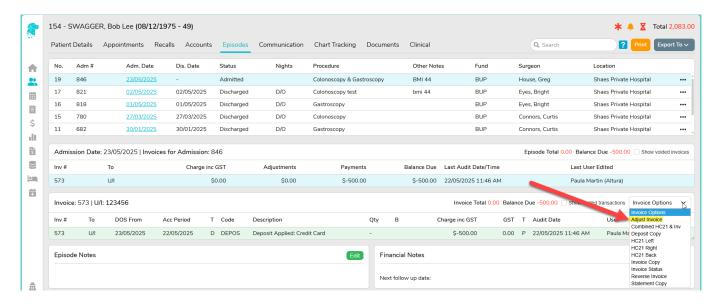
Once the appropriate invoice is selected, click Link Payment.

In the example below, the \$150 deposit has been reallocated from Invoice 582 to Invoice 583.

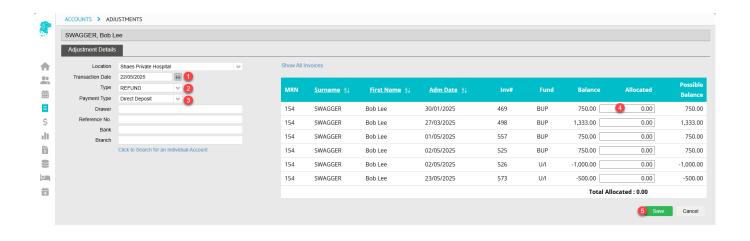


Refund Adjustment via Episodes Screen (Hospital)

Navigate to the **Episodes Screen** and select the **invoice** that requires the refund. Utilise the **Invoice Options** dropdown to select **Adjust Invoice**.



- 1. The **Transaction Date** will populate as the current date but can be amended if required to reflect the actual date the refund was processed.
- 2. Select **Refund** in the **Type** field.
- 3. The **Payment Type** field is displayed allowing the facility to record how the refund was processed.
- 4. Add the **refund amount** to the corresponding **Allocated** field.
- 5. Click Save



Hospital Health Fund Fees - Importing Casebase Fees

FYDO now has the option to import Casebase Fees from an Excel file.

It is important to note that the file must be an Excel file and must be set out in the same way as the sample template below. There is also a link below to download a blank template:

Casebase Fee Import Sample



Column headings need to be:

- A MBS
- B Casebase
- C Procedure
- D Type
- E DVA
- F OutlierDays
- G OutlierRate
- H GST
- I ExclOS
- J IgnoreStepDown
- K ExcludePrivateRoom

The above layout reflects the content, and order of information, that is displayed on the Casebase Fees tab in FYDO.



If the file is not formatted in this way, with the exact column titles, the data will not be

able to be imported into FYDO or will upload into the wrong fields.

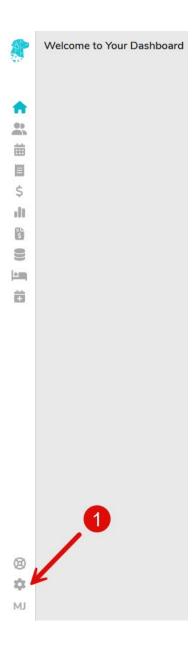
How to Format an Excel File for Casebase Fee Upload

Data from a Health Fund contract can be transferred into the relevant columns of the template, or a copy of a contract can be modified using the following steps:

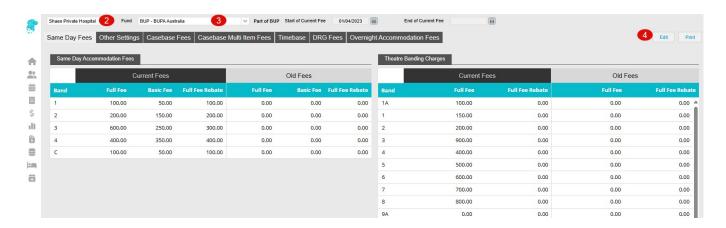
- 1. Save a copy of the contract (do not edit the master copy)
- 2. Go to Casebase Fee tab or section in the contract
- 3. Remove any lines above the header table so that there is only one header row
- 4. Delete any columns that do not contain the required information as per the images above
- 5. Ensure the names and order of all columns and the header row match the template exactly

How to Upload Casebase Fee File into FYDO

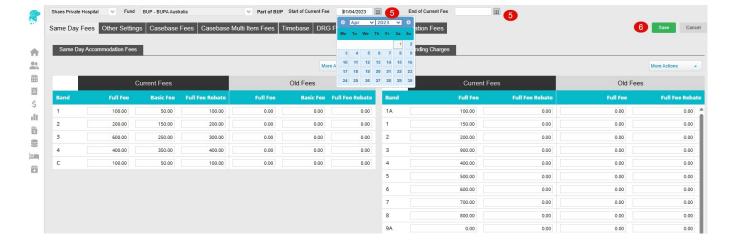
1. Go to **Settings** & select **Fees Setup**



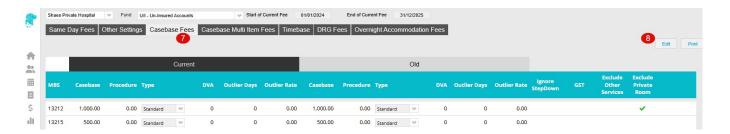
- 2. Choose your location from the dropdown menu (only applicable to multi-site users)
- 3. Select required Fund
- 4. Ensure Same Day Fees tab is selected and Click Edit



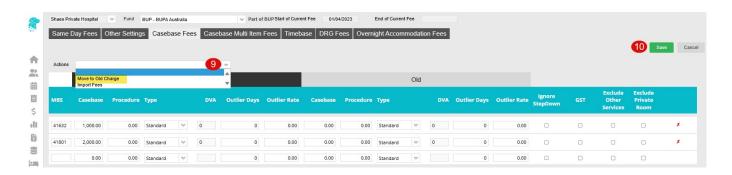
- 5. Update Start of Current Fee and End of Current Fee dates
- 6. Click Save



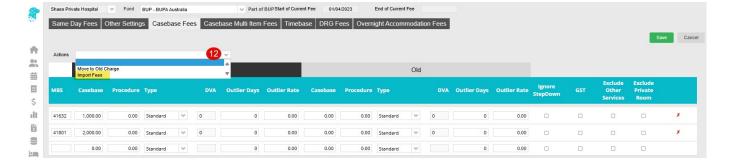
- 7. Click Casebase Fees tab
- 8. Select Edit



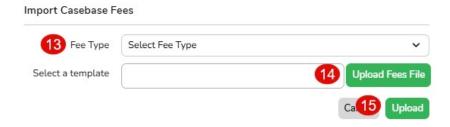
- 9. Open the **Actions** dropdown and select **Move to Old Charges** this step is optional, however it is recommended as it ensures that episodes prior to the new contract dates are billed at the appropriate rates, otherwise all unbilled episodes will be billed at the newly loaded rates
- 10. Click Save



- 11. Click Edit again
- 12. Utilise the **Actions** dropdown again to select **Import Fees**



- 13. Click **Fee Type** and select **Current File**
- 14. Click **Upload Fees File** and locate the relevant Excel file to be uploaded
- 15. Click **Upload**



- 16. Casebase items and fees will populate into the Casebase Fees tab
- 17. Click Save
- 18. Select **Print** to print or download, then **conduct a spot check with the contract to ensure fees have populated correctly**

Note: If a Casebase item no longer exists in the new fees, but there was an old rate, the line will remain in the fees screen and Current will show as \$0 (Old will show the previous rate). If a DRG has a zero-dollar balance under the Current fees AND the Old fees, FYDO will automatically remove this line from the fees page, as it is no longer required.

<u>Hospital Health Fund Fees - Importing DRG</u> Fees

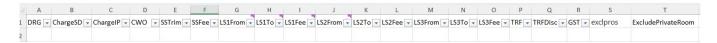
FYDO now has the option to import DRG fees from an Excel file.

It is important to note that the file must be an Excel file, and must be set out in the same way as the sample template below.

Or click the link below to download a blank template:

DRG Import Sample

Using the same column titles as can be seen in this spreadsheet example.



Column headings need to be:

- A DRG
- B ChargeSD
- C ChargeIP
- D CWO
- E SSTrim
- F SSFee
- G LS1From
- H-LS1To
- I LS1Fee
- I LS2From
- K LS2To
-
- L LS2Fee
- M LS3From
- N LS3To
- O LS3Fee
- P-TRF
- O TRFDisc
- R GST
- S Exclpros
- T ExcludePrivateRoom

The above layout reflects the content, and order of information, that is displayed in FYDO.

If the file is not formatted in this way, with the exact column titles, the data will not be able to be imported into FYDO, or will upload into the wrong fields.

How to Format an Excel File for DRG Upload

Data from a Health Fund contract can be transferred into the relevant columns of the template, or a copy of a contract can be modified using the following steps:

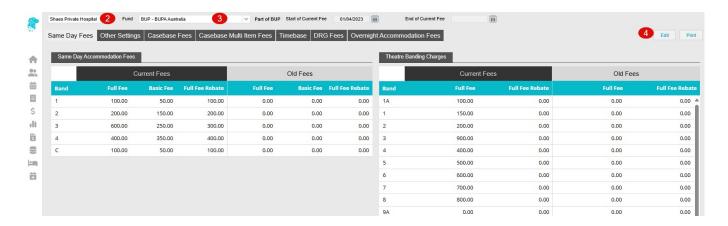
- 1. Save a copy of the contract (do not edit the master copy)
- 2. Go to DRG tab or section in the contract
- 3. Remove any lines above the DRG header table so that there is only one header row
- 4. Delete any columns that do not contain the required information as per the images above
- 5. Ensure the names and order of all columns and the header row match the template exactly

How to Upload DRG File into FYDO

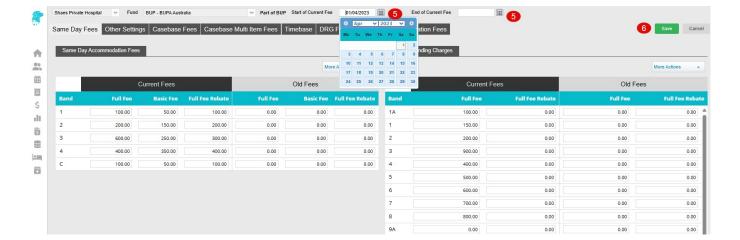
1. Go to **Settings** & select **Fees Setup**



- 2. Choose your location from the dropdown menu (only applicable to multi-site users)
- 3. Select required Fund
- 4. Ensure Same Day Fees tab is selected and Click Edit



- 5. Update Start of Current Fee and End of Current Fee dates
- 6. Click Save



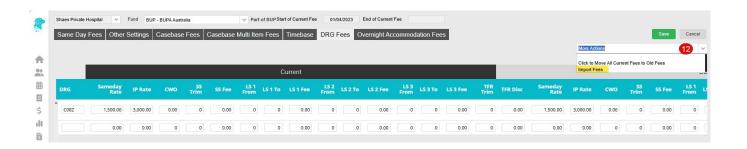
- 7. Click **DRG Fees** tab
- 8. Click Edit



- 9. Click **More Actions** and select **Click to move all Current fees to Old** and follow instructions this step is optional, however it is recommended as it ensures that episodes prior to the new contract dates are billed at the appropriate rates, otherwise all unbilled episodes will be billed at the newly loaded rates
- 10. Click Save



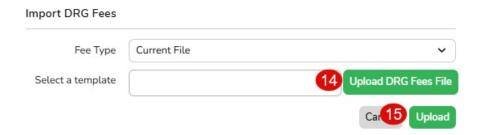
- 11. Click Edit
- 12. Click **More Actions** and select **Import Fees**



13. Click **Fee Type** and select **Current File**



- 14. Click **Upload DRG Fees File** and locate the relevant Excel file to be uploaded
- 15. Click Upload



- 16. DRG items and fees will populate into the DRG Fees tab
- 17. Click Save
- 18. Select **Print** to print or download, then **conduct a spot check with the contract to ensure fees have populated correctly**

Note: If a DRG no longer exists in the new fees, but there was an old rate, the line will remain in the fees screen and Current will show as \$0 (Old will show the previous rate). If a DRG has a zero-dollar balance under the Current fees AND the Old fees, FYDO will automatically remove this line from the fees page, as it is no longer required.

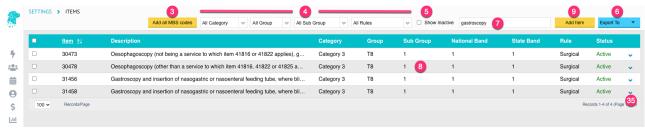
Adding MBS Item Numbers - Hospital

Adding or amending an MBS item in FYDO for the purpose of updating descriptions, adding facility specific cosmetic codes or removing items that are no longer needed.

The item numbers are updated in FYDO with each National Procedure Bandings Update.

Facilities will be responsible for updating the Theatre Band (State) according to their relevant contracts.

- 1. Go to **Settings**
- 2. Select **Items** from the General menu



- 3. **Add all MBS Codes** will update all items in your FYDO system according to the current National Procedure Bandings.
- 4. Use the **filters** to search specific categories or groups etc
- 5. Use the **Show Inactive** tick box to view any items that have been made inactive in the database
- 6. Use the **Export To** option to export the list that is shown on the screen to an Excel spreadsheet
- 7. Use the **Search** field to find a specific item number or key word to determine if the item is already in the system. *All items that include the searched information in the description will also appear*
- 8. If the required item number displays, **double click** anywhere on the line to open the information
- 9. If the required item number doesn't appear, and it needs to be added, click **Add Item**



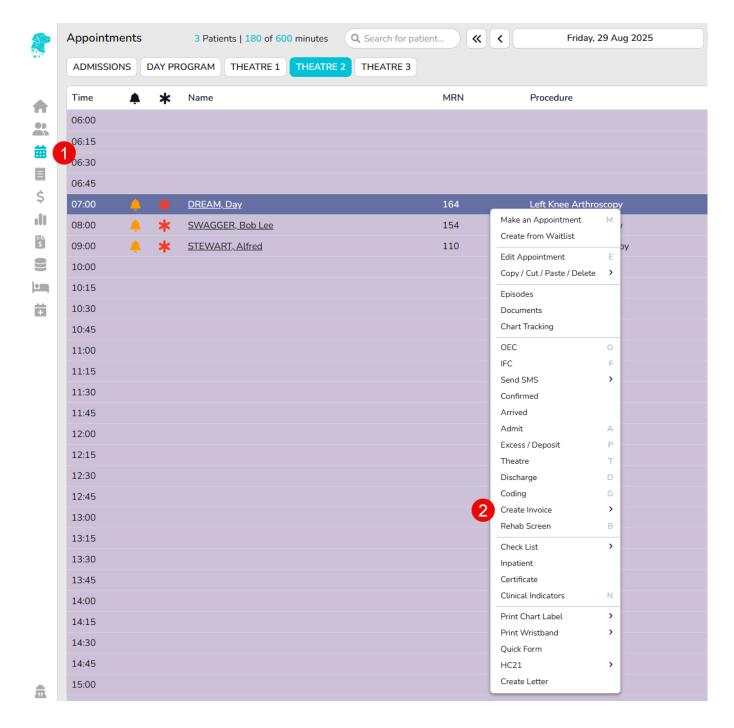
- 10. Add the item number, or desired code, into the **Number** *NB*. This field will never be editable after it has been created & saved
- 11. Add the description for the item into the **Procedure Name** (*The Number & Procedure Name fields are both mandatory fields that are required to add an item*)
- 12. The **Notes** field is available for any notes that may be required that relate to the item. It has no effect on how the item number is billed or displayed & can only be seen by navigating to this screen
- 13. **Linked Procedures** give the ability to add ICD procedure code base items to link to this item number. This can make coding the ICD procedures easier. (Hovering over the for the explanation of this field at any time)
- 14. **Category, Group & Sub Group** are fields that will pre-populate when a real MBS item number is added. FYDO will look up all these values, from the MBS Schedule, and import them. These values will be updated whenever a new MBS update is loaded & there is no need to edit these manually
- 15. **Item Type** is a field that can help categorise the item being entered. (NB. These Item Types can be added by going to **Settings**, **Item Types** & clicking **Add Item Type**). This field allows the user to allocate items to a group (e.g., cardiology, consults etc) and to run reports on the items that are grouped together by the category
- 16. **Qty on Hand** can be used in conjunction with the item type
- 17. **Modal** is not required for hospitals (this is a clinic related field)
- 18. **Rule** is used to determine the rules to apply step downs etc for doctor billing
- 19. **100% Rebate** is to be ticked when the Medicare benefit is 100%, rather than 85% for in room services and is only applicable for doctor billing
- 20. **R-Type** is to be ticked if the item requires a referral. NB. This only relates to

- radiology/imaging items for doctor billing
- 21. **Stock Item** is not required for hospitals (this is a clinic related field)
- 22. **Ask Quantity** is not required for hospitals (this is a clinic related field)
- 23. Use the following to ensure the item is classified correctly, according to the relevant banding & accommodation types:
 - Theatre Band (National) will be updated by FYDO automatically
 - Theatre Band (State)
 - Day Type will be updated by FYDO automatically
 - Patient Class will be updated by FYDO automatically
 - DVA Accommodation
- 24. Tick **Same Day Accom Band 1 Override** if the item number can only have a band 1 accommodation billed in conjunction with it, regardless of the anaesthetic type or length of procedure
- 25. Tick **Accom Item** if the item being entered is required to be billed as an accommodation fee, as per the health fund contract
- 26. Tick **Eclipse Code Mapping** if the code being entered requires mapping to be able to be sent via Eclipse for billing. E.g., COL1, PKG38 or D001
- 27. Tick **Item Excluded from PSG** to exclude the item from the IHC PSG/MSG segment when being sent via eclipse. E.g., for NIB endoscopy claims
- 28. Tick **Miscellaneous/ADA Code** if the item is required to show in the Miscellaneous code section for data submission, instead of in the MBS code section. Commonly used for dental codes
- 29. Tick **Timebase** if this item is required to be billed according to the time it takes. Ticking this box will alert the system to look in the Timebase Fees set up for the chargeable fee
- 30. Click Save
- 31. To **Deactivate** an item number, follow steps 1-4 above & click **Edit**
- 32. Un-tick the **Active** box & the word will change to **Inactive**
- 33. Click Save
- 34. To **Re-Activate** an item, simply tick the **Inactive** box again & click **Save**
- 35. To remove an item number all together click on the Blue Drop Down Arrow on the right of the screen (as seen in the first image above) and click **Delete item**
- 36. You will be asked to confirm that you want to delete the item. Click **Yes**

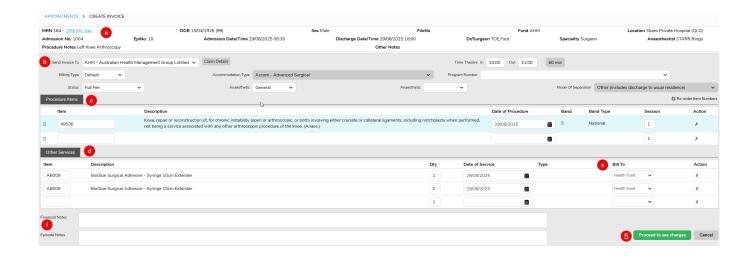
<u>Hospital Invoicing / Billing an Episode - Simple</u>

Once the episode is complete, an invoice can be raised to a health fund or patient. For an invoice to be raised, the episode needs to be:

- Admitted
- Discharged
- Theatre Complete tick box checked (depending on the facility requirements)
- Coding Grouped (depending on the facility requirements)
 - 1. Open the **Appointments Screen** and locate the required episode
 - 2. Right Click to reveal the menu & select Create Invoice



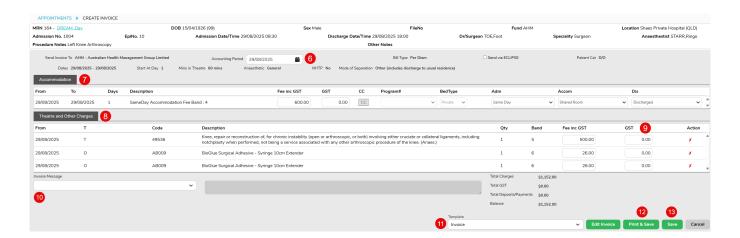
3. The **Create Invoice** page will display with the following necessary information:



- a. All patient information specific to the episode
- b. Billing information including:Billing Type

Theatre Times

- c. Procedure Items being billed (drawn from Theatre Screen if entered)
- d. Other Services being billed (drawn from Theatre Screen if entered)
- e. The **Bill To** feature allows other services to be billed to the patient or a third-party company, even if the main invoice is being billed to a health fund. Selecting **Patient** from this dropdown will create a separate invoice/invoice number for the patient account
- f. The **Financial Notes** & **Episodes notes** fields will reflect notes that have been entered into the patients' Episodes screen.
- g. As long as all required information has been previously entered into the **Theatre Screen**, there should be few reasons that anything on the Create Invoice page needs to be amended
- h. Click Proceed to see charges



- 6. The invoice information is displayed, including:
 Accounting Period (That the revenue will be applied to)
 Bill Type
 - **ECLIPSE** transmission status
- 7. The **Accommodation** charges will be shown
- 8. The **Theatre & Other Services Charges** will be displayed
- 9. GST can be amended with a Right Click in the GST Field
- 10. Custom **Invoice Messages** are able to be added. (Invoice Message Templates can also be added in **Settings > Invoice / IFC Messages**, so that they can easily be selected from the dropdown list)
- 11. Invoice template can be selected
- 12. **Print & Save** can be selected when the invoice isn't able to be sent via ECLIPSE & the user requires a printed or PDF copy of the invoice
- 13. **Save** can be selected when the invoice **is** able to be transmitted electronically via ECLIPSE & the user does not require a hard copy of the invoice

Once the user has selected Save for an invoice that can be transmitted electronically via ECLIPSE, they will then need to send this invoice by following the FYDO wiki instructions Claiming Hospital - Not Yet Sent

For a more detailed explanation of FYDO invoicing please see:

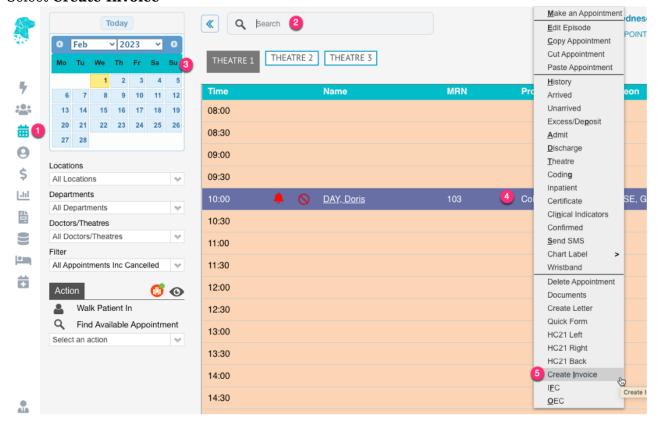
<u>Hospital Invoicing / Billing an Episode -</u> Detailed

Once the episode is complete, an invoice can be raised to a health fund or patient. For an invoice to be raised, the episode needs to be Admitted & Discharged. Depending on the requirements that the facility has stipulated in System Configuration, the Theatre Complete tick box may need to be ticked in order to confirm the item numbers are correct for billing. And the episode may need to be Grouped in order for billing to be able to be done.

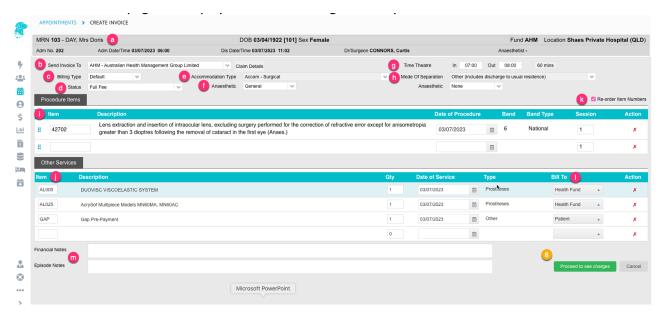
A simple invoicing & billing explanation can be found at:

Hospital Invoicing / Billing an Episode - Simple

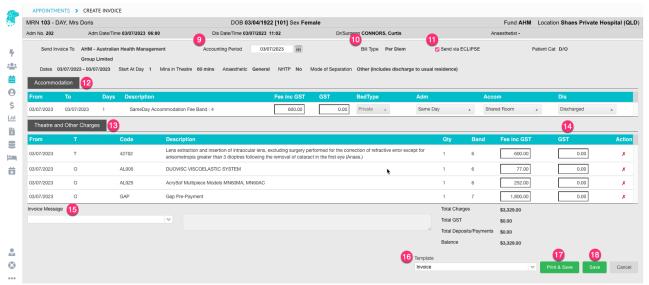
- 1. Navigate to the **Appointments Screen**
- 2. Use the **Search** field to locate the required episode or
- 3. Use the **Calendar** to select required date & **Theatre Tabs** to select required theatre
- 4. Locate required episode & **Right Click** to reveal the menu
- 5. Select Create Invoice



6. The **Create Invoice** page will display with the following necessary information:



- a. All patient information specific to the episode
- b. The health fund being invoiced
- c. **Billing Type** can usually be left as default. This allows FYDO to review the fees entered for the health fund & bill accordingly by **Casebase**, **Per Diem** or **DRG**
- d. The Status of the invoice being billed: either Full Fee or Basic Fee
- e. The Accommodation Type
- f. The anaesthetic type being billed
- g. The theatre times that the invoice will be based on
- h. The Mode of Separation
- i. The items being billed
- j. The Other Services being billed
- k. The **Re-order Item Numbers** tick box allows users to keep the item numbers in the order they have been entered in. However, if this box is checked, then FYDO will order the item numbers from highest to lowest banding
- The Bill To feature allows other services to be billed to the patient or a third-party company, even if the main invoice is being billed to a health fund. Selecting Patient from this dropdown will create a separate invoice/invoice number for the patient account
- m. The **Financial Notes** & **Episodes notes** fields will reflect notes that have been entered into the patients' Episodes screen.
- 7. As long as all required information has been previously entered into the **Theatre Screen**, there should be few reasons that anything on the Create Invoice page needs to be amended
- 8. Click **Proceed to see charges**



- 9. The **Accounting Period** date, which the revenue will be applied to, is displayed. (*The default date that is selected in this field is set in Settings > System Configuration*)
- 10. The **Bill Type** that has been used will be displayed
- 11. The invoice's ability to be transmitted via ECLIPSE will be shown with the tick box
- 12. The **Accommodation** charges will be displayed
- 13. The **Theatre & Other Services Charges** will be displayed
- 14. **GST** will be displayed if the fees for that item have been set up to include GST. Otherwise, users are able to calculate the GST amount by **Right Clicking** in the **GST Field**
- 15. Custom **Invoice Messages** are able to be added & the user is able to type the required messages. However, Invoice Message Templates can also be added in Settings > Invoice / IFC Messages so that they can easily be selected from the dropdown list
- 16. FYDO allows for multiple Invoice Templates to be added. A default template can be set, but if another template is required, it can be selected from the Template dropdown
- 17. **Print & Save** can be selected when the invoice isn't able to be sent via ECLIPSE & the user requires a printed or PDF copy of the invoice
- 18. **Save** can be selected when the invoice **is** able to be transmitted electronically via ECLIPSE & the user does not require a hard copy of the invoice

Once the user has selected Save for an invoice that can be transmitted electronically via ECLIPSE, they will then need to send this invoice by following the FYDO wiki instructions Claiming Hospital – Not Yet Sent