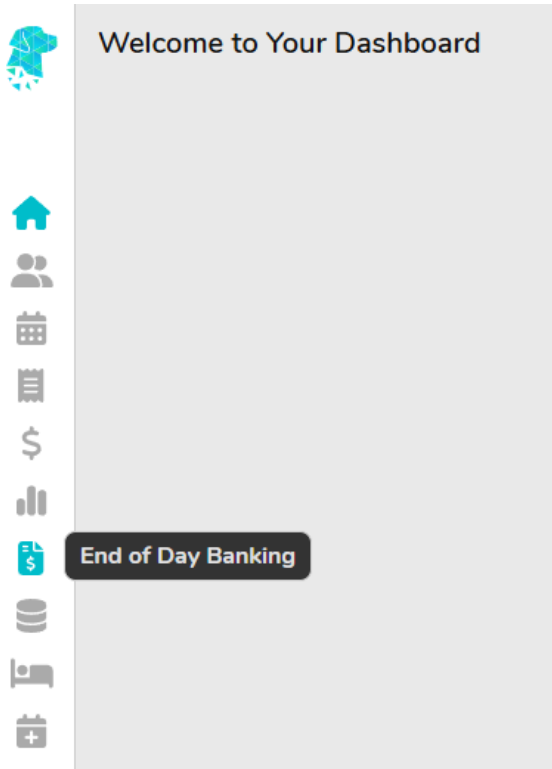


End of Day Banking (Hospital)

1. Select **End of Day Banking** from the main menu



2. This will open the screen where the user can perform the End of Day Banking
3. For multi-location facilities, ensure the correct location is selected

The screenshot shows the "END OF DAY BANKING" screen. At the top, there are dropdown menus for location (Almas Private Hospital), area (All Area), and type (All Types), along with a "Save & Print" button. Below this is a summary table with the following data:

Total EFT 500.00		Total Cash		Total Balance 2,100.00	
Total Amex/Diners		Total Medicare Cheque		No. of Deposits	2
Total Credit Card 1,600.00		Total Cheques		Total Online Payment	

Below the summary table is a list of transactions with the following columns: MRN, Drawer, Reference Number, Bank, Area, Payment Date, Method, and Amount. The first two rows are highlighted with a red box:

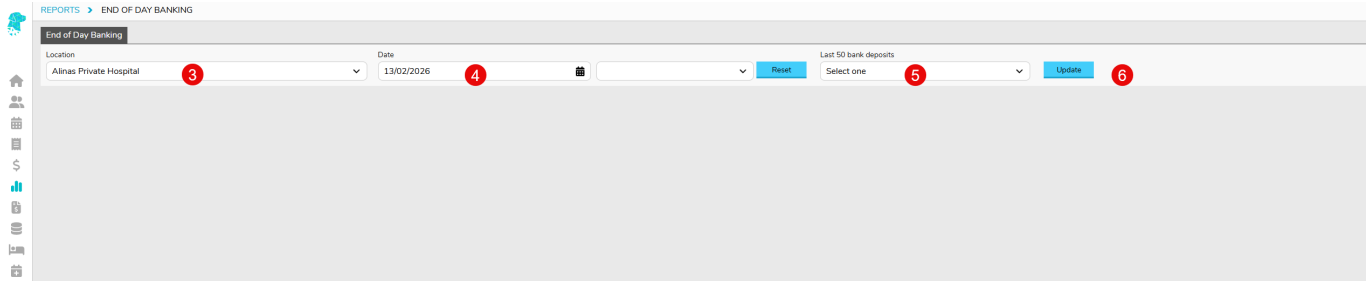
MRN	Drawer	Reference Number	Bank	Area	Payment Date	Method	Amount
106	POTTER, Harry	-			13/02/2026	Credit Card	1,600.00
105	GRANGER, Hermione	-			13/02/2026	EFTPOS	500.00

At the bottom left, there is a "Records/Page" dropdown set to 100. At the bottom right, it says "Records 1-2 of 2 (Page 1 of 1)".

4. Check each payment off as it is compared with corresponding data for accuracy
5. Ensure **Totals** match the EFTPOS settlement & cash/cheques taken
6. **Total Balance** of all revenue received will be shown
7. Click **Save & Print**
8. You will be prompted to confirm that you want to clear the transactions.
9. Once confirmed with **Yes** the **End of Day Banking Report** will be available for printing

Re-Printing End of Day Banking Report

1. Select **Reports** from the main menu
2. Select **End of Day Banking**

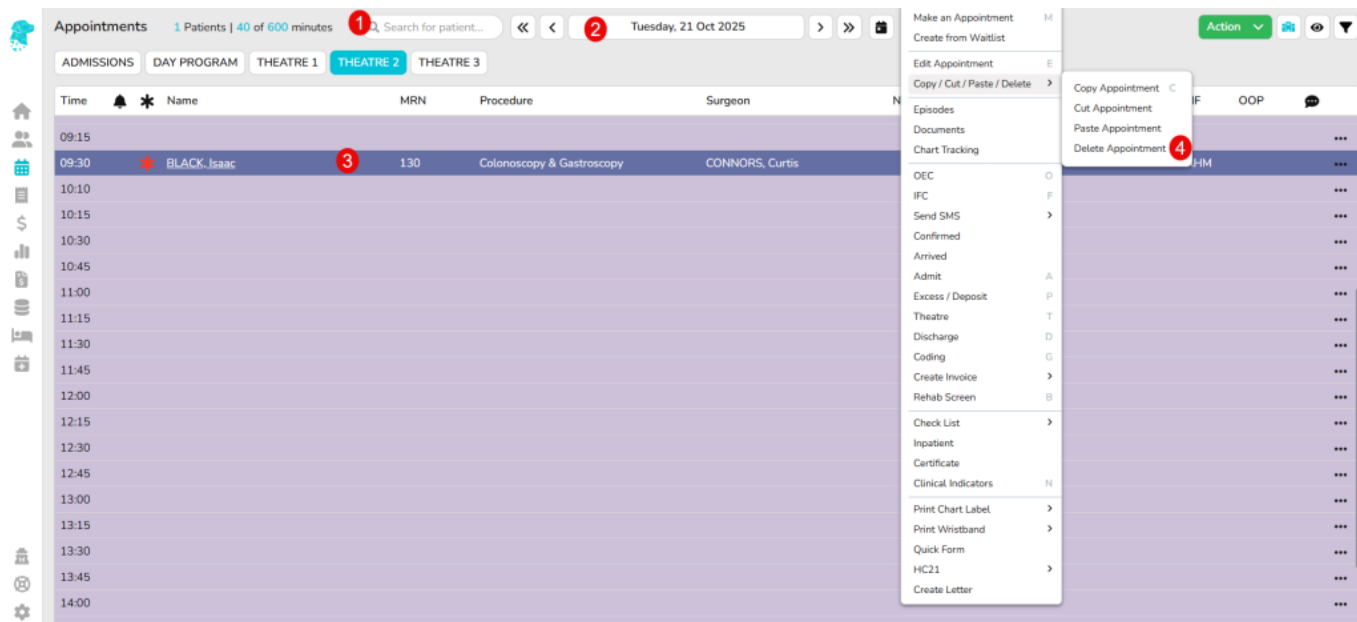


3. For multi-location facilities, ensure correct location is selected
4. Select the **Date & Time** for the required report **OR**
5. Select from the list of **Last 50 bank deposits**
6. Click **Update** and the selected report will be displayed on the screen
7. It can then be **Printed** or **Exported** using the corresponding blue buttons at the bottom right of the screen

Delete a Hospital Booking

If an appointment is required to be removed from the system

1. Search for the patient **OR**
2. Navigate to the date & theatre that the patient is booked for
3. Select the patient & right click to open menu
4. Select **Copy/Cut/Paste/Delete** and then select **Delete Appointment**



5. You will be prompted to **confirm** that you are sure you want to delete the appointment

6. Click **Yes**

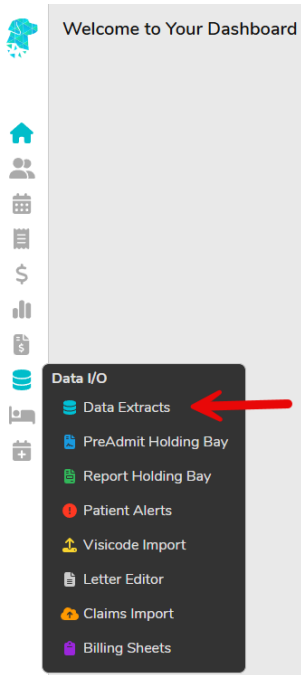
7. [Redacted]

If statistical information on the cancellation is required, then please see instructions on how to **Cancel a Booking** at <https://wiki.fydo.cloud/cancel-a-booking/>

Hospital Data Extraction

Exporting Reportable Data (PHDB/HCP/State specific/Cancer Registry)

1. Select **Data I/O** from the left-hand menu
2. Select **Data Extracts**



3. Ensure correct location is selected (*for facilities with multiple locations*)
4. Select the month you need to extract
5. Select the type of data you need to extract
6. Select **Prepare Extract**

Location	Type	Fund	Period	# of Episodes	Date Extracted	Extracted By	Action
Shaes Private Hospital	HCP	AHM	Aug 2025	1	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	BUP	Aug 2025	6	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	HCF	Aug 2025	1	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	MPL	Aug 2025	2	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	WC	Aug 2025	1	08/09/2025 12:39 PM	Shae Darr (Altura)	↓

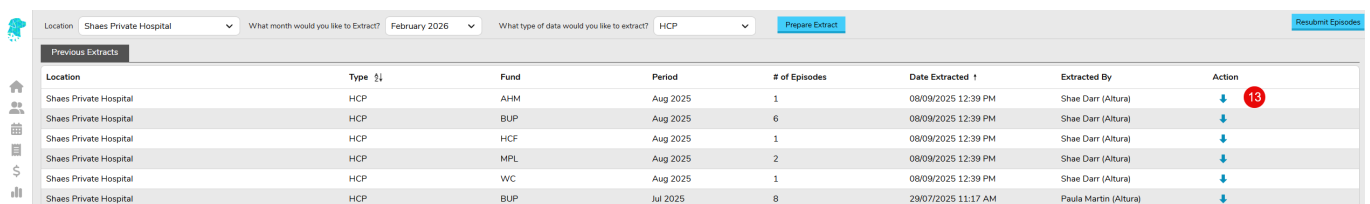
7. You will be shown:
 - a. Total Number of Episodes for the period
 - b. Number of Episodes Ready to be exported
 - c. Number of Episodes with Errors that require attention
 - d. A list of the episodes that need amendments in order to have your data ready for submission
 - e. An option to print the list of errors, or export it for further action

MRN	Patient Name	Admission Date	Discharge Date	Admission No.	Error	Where to Fix
102	DEAN, James	03/02/2026	03/02/2026	1228	Missing health fund membership number	Appointment Screen
232	LAST, First	03/02/2026	03/02/2026	1229	Missing principal ICD diagnosis	Coding Screen
232	LAST, First	03/02/2026	03/02/2026	1229	Missing theatre from time	Theatre Screen
232	LAST, First	03/02/2026	03/02/2026	1229	Missing theatre to time	Theatre Screen
164	DREAM, Day	02/02/2026	02/02/2026	1230	Missing principal ICD diagnosis	Coding Screen
164	DREAM, Day	02/02/2026	02/02/2026	1230	Missing theatre from time	Theatre Screen

8. Navigate to the screen that is identified as **Where to fix** and amend the information that is required. This can be done with a **Right Click** on the line or using the **Patient Name**

Hyperlink to navigate to the require screen.

9. Once all errors have been rectified, follow the above steps again to check that the data is ready to export
10. Data is ready to export once there are no more errors documented in the list.
11. Once all errors are rectified the Print & Export To options in the top right corner (e. in the above image) will change to a **Submit** button. Click **Submit**
12. Your data files will be saved in FYDO
13. You can download this file by using the down arrow ↓ under the **Action** column with a normal mouse click (*not a Right Click*)
14. You can upload these files directly into the appropriate portal. (*Ensuring the file name for BUPA does not contain any symbols*)
15. Once uploaded there is no need to keep a copy of the file on your computer, as you are able to access & download again if required from FYDO.



The screenshot shows a web interface for data extraction. At the top, there are dropdown menus for 'Location' (Shaes Private Hospital), 'What month would you like to Extract?' (February 2026), and 'What type of data would you like to extract?' (HCP). There are buttons for 'Prepare Extract' and 'Resubmit Episodes'. Below this is a table titled 'Previous Extracts' with the following columns: Location, Type, Fund, Period, # of Episodes, Date Extracted, Extracted By, and Action. The table contains seven rows of data.

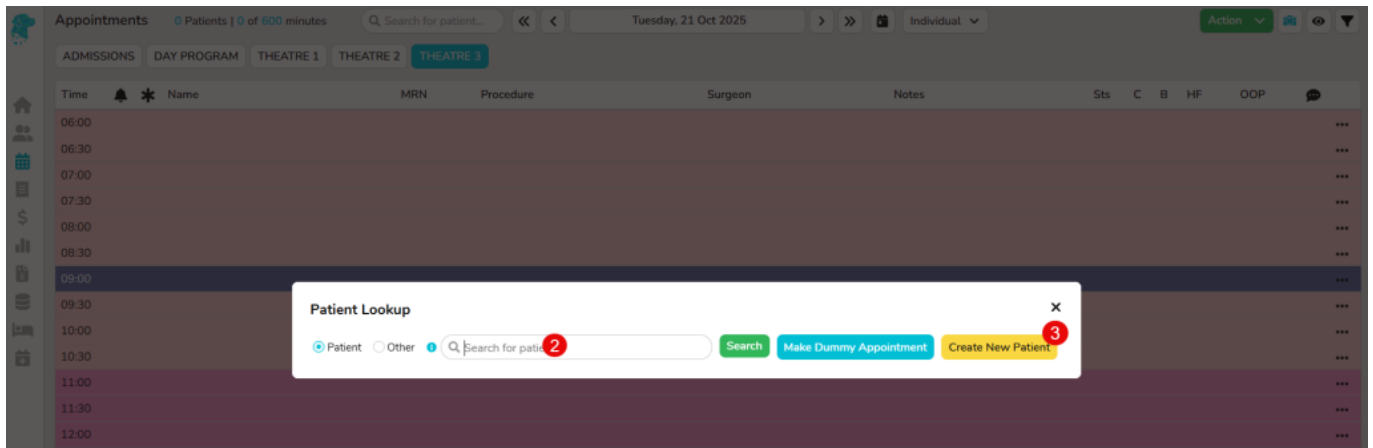
Location	Type	Fund	Period	# of Episodes	Date Extracted	Extracted By	Action
Shaes Private Hospital	HCP	AHM	Aug 2025	1	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	BUP	Aug 2025	6	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	HCF	Aug 2025	1	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	MPL	Aug 2025	2	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	WC	Aug 2025	1	08/09/2025 12:39 PM	Shae Darr (Altura)	↓
Shaes Private Hospital	HCP	BUP	Jul 2025	8	29/07/2025 11:17 AM	Paula Martin (Altura)	↓

For instructions on how to **Re-Extract Hospital Data** visit our wiki page:
[Re-Submitting a Hospital Data Extraction](#)

[Create a New Patient \(Hospital\)](#)

There are several ways to do this, but the most common method is during the appointment booking process.

1. Once you have navigated to the date & time for the appointment, right click & select **Make an Appointment**
2. This will open up the **Patient Lookup** box where you are able to search for the desired patient
3. If you are unable to locate the patient click the **Create New Patient** button



4. You are required to add a minimum of **First & Last Name** and all other fields are optional when initially adding a patient (*but be aware that certain fields may be required, once the patient is admitted, for reporting purposes*)
5. Once all desired information is entered click **Save**
6. The appointment screen will then open to add all required information for that particular booking

Patients are also able to be added without having an appointment scheduled.

1. Select the **Patients** tab from the left main menu
2. **Search** to see if the patient is already entered into the system
3. If they have not previously been added, click **Create Patient**

Surname	First Name	Address	Suburb	State	DOB	Age	MRN	File No.	Archived
ADMITTED	Never	-	-	-	-	0	169		>
AURELIUS	Marcus	123 Roman Road	Rome	QLD	08/12/1954	70	194		>
BLACK	Isaac	55 Five Mile Road	Five Mile	QLD	08/08/2018	7	130		>
BOND	Mary	1007 Bond Ave	BOND UNIVERSITY	QLD	03/04/1958	67	120		>
BRANSON	Richard	22 Necker Way	BADU ISLAND	QLD	18/07/1950	75	112		>

4. You are required to add a minimum of **First & Last Name** and all other fields are optional when initially adding a patient (*but be aware that certain fields may be required, once the patient is admitted, for reporting purposes*)
5. Once all desired information is entered click **Save**

Cancel a Hospital Booking

If a patient cancels their appointment

1. Search for the patient **OR**
2. Navigate to the date & theatre that the patient is booked for
3. Select the patient & **right click** to open menu
4. Select **Edit Episode**

The screenshot shows the 'Appointments' interface. At the top, there's a search bar (1) and navigation for Tuesday, 21 Oct 2025 (2). Below, there are tabs for THEATRE 1, THEATRE 2, and THEATRE 3. A table lists appointments, with one for Isaac Black at 09:30 (3). A context menu is open over this appointment, with 'Edit Appointment' (4) selected. The menu includes options like 'Make an Appointment', 'Create from Waitlist', 'Edit Appointment', 'Copy / Cut / Paste / Delete', 'Episodes', 'Documents', 'Chart Tracking', 'OEC', 'IFC', 'Send SMS', 'Confirmed', 'Arrived', 'Admit', 'Excess / Deposit', 'Theatre', 'Discharge', 'Coding', 'Create Invoice', 'Rehab Screen', 'Check List', 'Inpatient', 'Certificate', 'Clinical Indicators', 'Print Chart Label', 'Print Wristband', 'Quick Form', 'HC21', and 'Create Letter'.

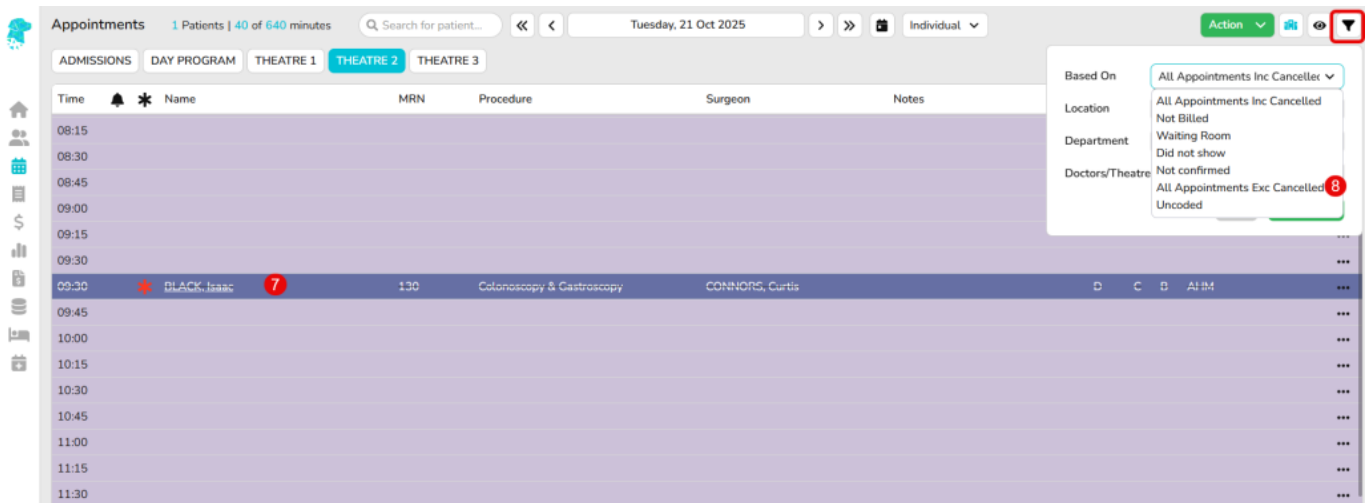
5. Use the **Cancelled** drop down to select a reason for cancellation (*N.B these cancelled reasons are fully customisable & can be added or edited in **Setting** under the **Cancelled Reasons** option to assist facilities obtain the cancellation data that they require*)
6. Click **Save**

The screenshot shows the 'Edit Appointment' form for Isaac Black. The 'Booking Details' section includes Location (Shaes Private Hospital), Theatre/List (Theatre 2), Dr/Surgeon (CONNORS, Dr Curtis), and Appointment Date (21/10/2025) at Time 09:30. The 'Procedure Notes' are 'Colonoscopy & Gastrosocopy'. In the 'Checklist' section, the 'Cancelled' dropdown (5) is open, showing options like 'Cancelled', 'Cancelled After Arrival', 'Cancelled Within 24 Hours', 'Covid', 'Did Not Attend', and 'Facility Cancellation'. The 'Fund Details' section shows 'Health Fund' (AHM - Australian Health Management Group Limited) and 'Insurance Status' (Full Fee). The 'Items' section lists three items: 'Removal of one or more polyps during colonoscopy, in...', 'Endoscopic examination of the colon to the caecum by...', and 'Oesophagoscopy (not being a service to which item...'. The 'Referring Details' section is also visible. A red circle 6 highlights the 'Save' button at the top right.

7. The patient will now be displayed with a strikethrough & the appointment time will be

available to book another patient

- To view your screen without the cancelled patients, use the Filter Dropdown **Based On** and select **All Appointments Exc Cancelled**



- To view the cancelled patients ensure you select **All Appointments Inc Cancelled** from the Filter Dropdown
- To reinstate an appointment, follow the above steps **1 > 4** and **remove** the cancellation reason from the episode before clicking **Save**



Depending on how far a patient is along their journey, there are different ways to handle a cancelled episode. For example, a patient who cancels before arriving at the facility will need to be handled differently than one who cancelled after admission.

The facility should determine the most appropriate option for each individual scenario. Below are a few options for processing these cases in FYDO:



If the patient **did not arrive at the facility** and was **not admitted**, the standard cancellation instructions above will apply. The episode will not be admitted and will simply be cancelled.

If the patient **did arrive** and was **admitted but did not proceed**, the facility can choose to revert the **episode back to a booking** by **Un-discharging** and **Un-admitting** the episode. Again, this will be up to the facility to decide if this is require depending on how far the patient journey progressed. This can be done via the **Episodes Screen** by utilising the **Right-Click Menu**.

Back to Appointments / 114 - SQUAREPANTS, Spongebob (13/07/2020 - 5)

Patient Details Appointments Recalls Accounts **Episodes** Communication Chart Tracking Documents Clinical

No.	Adm #	Adm. Date	Dis. Date	Status	Nights	Procedure	Other No
58	1100	17/10/2025	-	Admitted	0	Colonoscopy	
56	1026	08/09/2025	08/09/2025	Discharged	D/O	Carpal Tunnel Release	
55	977	06/08/2025	06/08/2025	Discharged	D/O	Colonoscopy & Gastro	
54	954	28/07/2025	28/07/2025	Discharged	D/O	Left Cat & IOL	
48	859	03/06/2025	03/06/2025	Discharged	D/O	Colonoscopy & Gastro	

Admission Date: 17/10/2025 | Invoices for Admission: 1100

Inv #	To	Charge inc GST	Adjustments	Payments
				No invo

- Admission
- Edit Appointment
- Theatre
- Leave
- Clinical Indicators
- Un-admit**
- Quick Form
- Other Services Only
- Remove Episode

The patient may need to be **refunded** any moneys paid, or the facility may choose to keep it and apply to another admission down the track.

If the patient was admitted and progressed partway through their journey, the more appropriate option may be to **complete the episode** by **admitting** and **discharging** them. Depending on how far they progressed, you may need to populate the **Visit to Theatre** field with **No Theatre Procedure Performed** when discharging the episode.

APPOINTMENTS > DISCHARGE

MRN 130 - BLACK, Isaac DOB 08/08/2018 (7) Sex Male FileNo Fund AHM Location Shaes Private Hospital (QLD)

Admission No. 1103 EpiNo. 7 Admission Date/Time 21/10/2025 06:00 Discharge Date/Time 21/10/2025 16:00 Dr/Surgeon CONNORS, Curtis Speciality IVF Anaesthetist HARRISON, George

Procedure Notes Colonoscopy & Gastroscopy Other Notes

Discharge Date 21/10/2025 Discharge Time 12:00

HCP and PHDB data

Mode Of Separation Other (includes discharge to usual residence)

Transferred To

Transfer Out Code Unknown

Visit to Theatre **No Theatre Procedure Performed**

Palliative Care Palliative Care Not required

Days in Palliative Care 0

Was Patient Involuntary at anytime? No Involuntary Days 0

Days in ICU 0 Hrs in ICU 0

Number HITH Visits 0 Hrs on Mechanical Vent 0

Decease Date Time Autopsy

Cause of Death

State Specific

Mode of Separation Home/Usual residence

Funding Source/Arrangmt Private health insurance

Chargeable Status Private Single

Compensable Status None of the above

1st Adm for P.C.T

Prev.Spec.Non-Admitted P.C.T

As every discharged patient is reported to the Department of Health, a **principal diagnosis code is mandatory**. If the facility opts to admit and discharge the episode, it will need to be **coded**. Please confirm the correct process with your coder. However, as an example, there would typically be a **primary diagnosis code**, and an additional diagnosis code explaining why the procedure was cancelled.

APPOINTMENTS > CODING SCREEN

MRN 130 - BLACK, Isaac DOB 08/08/2018 (7) Sex Male FileNo Fund AHM Location Shaes Private Hospital (QLD)

Admission No. 1103 EpiNo. 7 Admission Date/Time 21/10/2025 06:00 Discharge Date/Time 21/10/2025 16:00 Dr/Surgeon CONNORS, Curtis Speciality IVF Anaesthetist HARRISON, George

Procedure Notes Colonoscopy & Gastroscopy Other Notes

Example of diagnosis codes that explain why the procedure was cancelled

#	Code	Description	Indicator	Action	
1	P - Principal Diagnosis	H40.2	Primary angle-closure glaucoma	Y - Condition present on admission	X
2	P - Principal Diagnosis	Z53.1	Proc not done pt dechn oth & unsp reason		X

Procedure

Anaesthetic Type IV/Sedation

Surgeon/Dr Connors, Curtis Date 21/10/2025 Location

Save & Continue Save Cancel

When raising an invoice, please be aware that if an **accommodation band** is billed, it is implied to the health fund that the patient received an anaesthetic. In this instance, an **anaesthetic procedure code** must also be included in the coding screen.

Facilities will need to check their individual health fund contracts in order to decide if they can raise a charge for the particular admission.

Cancellation Reasons

Facilities may be required to collect different cancellation information for benchmarking, auditing, accreditation, and reporting purposes. FYDO makes this easy through **customisable Appointment Cancellation Reasons**.

Statistics such as **Cancelled After Arrival**, **Cancelled Within 24 Hours**, **Facility Cancellation** and other site-specific categories can all be configured as **Cancelled Reasons (Appointments)**. Once configured, these reasons can be utilised in reporting to provide visibility into why appointments are being cancelled and identify trends over time.

To ensure accurate reporting, your facility should configure the cancellation reasons required for your workflows and educate staff on when each cancellation reason should be used.

Follow the instructions below to set this up.

1. Navigate to **Settings**
2. Select **Cancelled Reasons (Appointments)**
3. Click **Add Cancelled Reasons (Appointments)** to add new cancellation reasons
4. Double click on an existing cancellation reason to amend it

SETTINGS

- General
 - Accommodation Categories
 - Appointment Types
 - Area Codes
 - Band Mappings
 - Booking Codes
 - Cancelled Reasons (Appointments)** 2
 - Cancelled Reasons (Theatre Rosters)
 - Certificates
 - Chart Location
 - Coding Hold Reasons
 - Checkers - Letters
 - Departments
 - Deposit Types
 - Doctors
 - Doctor Specialities
 - Document Types
 - ECLIPSE Mapping (Items)
 - ECLIPSE Mapping (Other Services)
 - Health Funds
 - Health Fund Participants
 - Hospitals
 - Invoice / IFC Messages
 - Item Types
 - Locations

SETTINGS > CANCELLED REASONS (APPOINTMENTS)

Show Inactive

3 Add Cancelled Reasons (Appointments)
 Export To

Code	Reason	Status	Action
2	Cancelled	Active	X
3	Cancelled After Arrival	Active	X
101	Cancelled Within 24 Hours	Active	X
103	Covid	Active	X
1	Did Not Attend	Active	X
102	Facility Cancellation	Active	X

100 Records/Page Records 1-6 of 6 (Page 1 of 1)

Utilise the correct Cancellation Reason when cancelling bookings, as per the instructions at the start of this page, and statistics than then be obtained from Reports.

1. Navigate to **Reports**
2. Select **Cancelled Episodes**
3. Simply run the report for the **date range required** for a comprehensive list of all cancelled procedures, or
4. Utilise the **Cancelled Reason** filter to obtain statistics on specific cancellation types

REPORTS

Reports

Patient Reports

- ☆ End of Day Banking
- ☆ Patient Stats
- ☆ Possible Double Bookings **1**
- ☆ Recalls

Financial Reports

- ☆ Adjustments
- ☆ Arrears
- ☆ Billing Status
- ☆ Billing Alerts
- ☆ Deleted Transactions
- ☆ Doctors Totals

Financial Reports

- ☆ Trial Balance
- ☆ Invoice Export

Reports - Hospital

Financial Reports

- ☆ Adjustments
- ☆ Arrears
- ☆ Billing Status
- ☆ Billing Alerts
- ☆ Deleted Transactions
- ☆ Doctors Totals

Hospital Reports

- ☆ Acute Certificate
- ☆ Appointments
- ☆ Bed Occupancy
- ☆ **Cancelled Episodes** **2**
- ☆ Chart Tracking
- ☆ Clinical Indicators

REPORTS > CANCELLED EPISODES

Cancelled Episodes

Location:

Theatre:

Doctor:

Cancelled Reason:

From - To: **3**

1 of 1 | 100% | Find | Next

Shaes Private Hospital
Cancelled Episode Report
Between 01/01/2026 and 21/05/2026

MRN	Patient Name	Admission	Doctor	Status	PatCat	Cancelled Reason	Procedure	Other Notes
222	BEACHES, Sandy	16/03/2026	BLACK, Jack	Booking	D/O	Cancelled After Arrival		
102	DEAN, James	09/02/2026	DOCTOR, Test	Booking	D/O	Cancelled	Colonoscopy	
167	FLINSTONE, Frederick	13/04/2026	BLACK, Jack	Discharged	D/O	Cancelled	Colonoscopy	
233	JEANS, Applebottom	05/03/2026	CONNORS, Curtis	Booking	D/O	Cancelled		
233	JEANS, Applebottom	04/03/2026	BLACK, Jack	Booking	D/O	Cancelled		
110	STEWARTS, Alfreds	21/01/2026	BLACK, Jack	Booking	D/O	Cancelled	Left Cat & IOL	
110	STEWARTS, Alfreds	24/03/2026	BLACK, Jack	Discharged	IP	Cancelled After Arrival	Carpal Tunnel	

Total Episode 7

CancelledEpisode-ShaesPrivateHospital Page 1 of 1 Date: 21/05/2026 6:19 AM

Hospital Appointments Screen

Navigating the Appointments Screen

Time	Name	MRN	Procedure	Surgeon	Notes	Sts	C	B	HF	OOP
06:00				TOE, Foot						
06:15				TOE, Foot						
06:30				TOE, Foot						
06:45				TOE, Foot						
07:00	DREAM_Day	164	Left Knee Arthroscopy	TOE, Foot		D			AHM	
08:00	SWAGGER_Bob Lee	154	Left Knee Arthroscopy	TOE, Foot		A	C	D	BUP	50.00
09:00	STEWART_Alfred	110	Right Knee Arthroscopy	TOE, Foot		B	C	B	HCF	750.00
10:00				TOE, Foot						
10:15				TOE, Foot						
10:30				TOE, Foot						
10:45				TOE, Foot						
11:00				TOE, Foot						
11:15				TOE, Foot						
11:30				TOE, Foot						
11:45				TOE, Foot						
12:00				TOE, Foot						
12:15				TOE, Foot						
12:30				TOE, Foot						
12:45				TOE, Foot						
13:00				TOE, Foot						
13:15				TOE, Foot						
13:30				TOE, Foot						
13:45				TOE, Foot						
14:00				TOE, Foot						
14:15				TOE, Foot						
14:30				TOE, Foot						
14:45				TOE, Foot						
15:00				TOE, Foot						
15:15				TOE, Foot						
15:30				TOE, Foot						
15:45				TOE, Foot						

1. **Date** - Click on the date to display the calendar to select required date
2. **Search** - to locate a particular patient/booking
3. **Info** - will display the **Number of patients** booked & **Minutes** the theatre is being utilised
4. **View** - gives the ability to choose how the theatres are displayed
 1. **All** - shows all theatres for 1 day
 2. **Individual** - shows 1 theatre for 1 day
 3. **Weekly** - shows 1 theatre for the whole week
 4. **List** - shows all appointments in 1 list
5. **Theatres** - are able to be selected here
6. **Filter** - the patients viewed to include/exclude cancelled patients etc
7. **Custom Views** - Create and select Custom Views to displayed relevant information
8. **Action** Dropdown allows users to
 - Print Theatre Lists**
 - Send Bulk SMS**
 - Re-Order Lists**

Hospital Adjustments

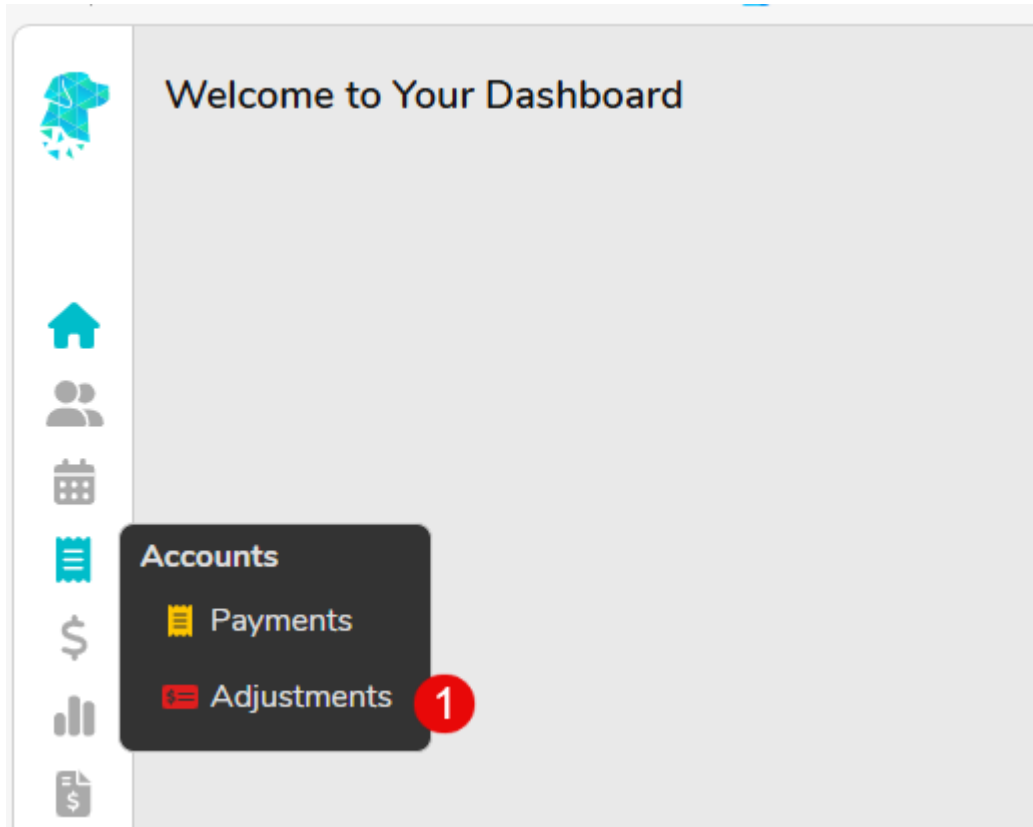
Adjustments via the Adjustments Screen

If an adjustment is required for refund, write off, incorrect billing purposes etc it can be done using the Adjustments Screen or from the Patient History / Episode screen. Both options are explained

below.

Making the entry from the Adjustments Screen

1. Go to **Accounts** in the main menu & select **Adjustments**



2. For multi-location systems, use the drop down to select the relevant **Location**
3. Enter the required **Transaction Date** if it differs from the current date
4. Use the **Type** dropdown to select the required transaction type e.g., write off, incorrect billing, discount, refund etc.
5. If **Refund** is selected as the Type, the **Payment Type** field will be displayed so the method of the transaction can be documented. For all other journal / adjustment Types this field will not be necessary & won't be displayed
6. Type the required information in the **Drawer** field
7. Use the **Reference No., Bank & Branch** fields, if the facility work instructions require, to document additional information regarding a bank cheque for refunds etc
8. Click "**Click to Search for an individual Account**" and the search box will be displayed to find the required patient. *(If processing this adjustment from the **Episodes Screen** any outstanding invoices will automatically be displayed)*
9. Once a patient is selected, the invoices with an outstanding amount will be displayed
10. Use the **Show All Invoices** option to display invoices that don't currently have an outstanding balance
11. Type the amount to be refunded in the **Allocated** column
12. Once you have moved from the Allocated field the system will show you the **Possible Balance** of the invoice, following the adjustment
13. Once all details have been confirmed & are correct click **Save**

ACCOUNTS > ADJUSTMENTS

103 - Spongebob, SQUAREPANTS

Adjustment Details

Location: Claires Private Hospital **2**

Transaction Date: 22/04/2026 **3**

Type: REFUND **4**

Payment Type: Direct Deposit **5**

Drawer: **6**

Reference No.: **7**

Bank: **8**

Branch: **8**

Click to Search for an Individual Account **8**

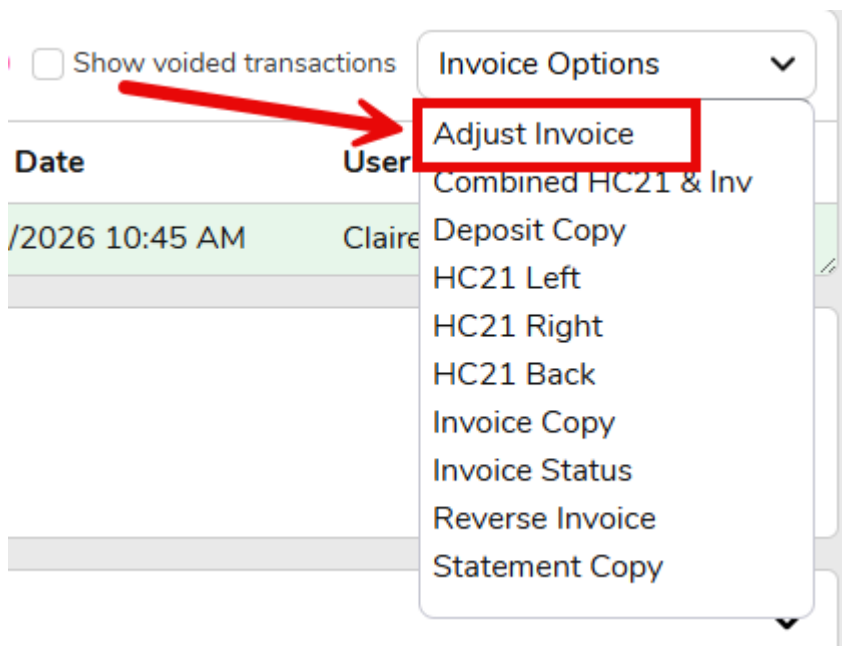
Show All Invoices **10**

MRN	Surname	First Name	Adm Date	Inv#	Fund	Balance	Allocated	Possible Balance
103	SQUAREPANTS	Spongebob	28/01/2026 9	3	UII	-250.00	0.00 11	-250.00 12
							Total Allocated : 0.00	

13 Save Cancel

Making the entry from the Episode Screen:

1. **Search** for the patient using the Search field or by selecting the required admission date & theatre
2. Right-click on the appointment & select **Episodes**
3. Once in the Episodes screen ensure that the correct date of admission is selected
4. Then use the **Invoice Options** drop down on the right of the screen to select **Adjust Invoice**



5. You will be redirected to the **Adjustments** screen where you can follow the instructions above from **step 2**.

Tokens - Mailing Label

Token Name	Data	Notes
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<<PracticeName>>	Practice Name
<<Title>>	Title
<<FirstName>>	First Name
<<LastName>>	Surname
<<MailingAdd1>>	Location Address 1
<<MailingAdd2>>	Location Address 2
<<MailingAdd3>>	Location Address 3

Tokens - Documents & Letters

Token Name	Data	Notes
<<DocFullName>>	Doctor Full Name	eg. SMITH, John
<<DocFirstname>>	Doctor First Name	eg. John
<<DocSurname>>	Doctor Second Initial	eg. SMITH
<<DocTitle>>	Doctor Title	
<<DocID>>	Doctor ID	
<<DocAdd1>>	Doctor Address 1	
<<DocAdd2>>	If Address Line 2 is empty, this will show Suburb State Postcode otherwise it will show Address Line 2	
<<DocAdd3>>	If Address Line 2 is empty, this will show nothing otherwise it will show Suburb State Postcode	
<<DocSuburb>>	Doctor Suburb	UPPERCASE
<<DocState>>	Doctor State	UPPERCASE
<<DocPC>>	Doctor Post Code	
<<DocMob>>	Doctor Mobile	9999 999 999
<<DocPh>>	Doctor Phone	99 9999 9999
<<DocFax>>	Doctor Fax	99 9999 9999
<<DocEmail>>	Doctor Email	
<<DocQualif>>	Doctor Qualification	
<<DocLoc>>	Doctor Location	
<<DocProv>>	Doctor Provider Number	
<<DocABN>>	Doctor ABN	

<<DocInvAs>>	Invoice As for Clinic	
<<DocAccName>>	Doctor Account Name	
<<DocBSB>>	Doctor BSB	
<<DocAccNum>>	Doctor Account Number	
<<DocBankAdd>>	Doctor Bank Address	
<<DocBank>>	Doctor Bank Name	
<<RefFullName>>	Referring Doctor Full Name	eg. SMITH, John
<<RefFirstName>>	Referring Doctor First Name	eg. John
<<RefSurname>>	Referring Doctor Surname	eg. SMITH
<<RefTitle>>	Referring Doctor Title	
<<RefID>>	Referring Doctor ID	
<<RefPractice>>	Referring Doctor Practice	
<<RefPracID>>	Referring Doctor Practice ID	
<<RefAdd1>>	Referring Doctor Address 1	
	If Address Line 2 is empty, this will show Suburb State	
<<RefAdd2>>	Postcode	
	otherwise it will show Address Line 2	
	If Address Line 2 is empty, this will show Suburb State	
<<RefAdd3>>	Postcode	
	otherwise it will show Address Line 2	
<<RefSuburb>>	Referring Doctor Suburb	UPPERCASE
<<RefState>>	Referring Doctor State	UPPERCASE
<<RefPC>>	Referring Doctor Postcode	
<<RefMob>>	Referring Doctor Mobile	9999 999 999
<<RefPh>>	Referring Doctor Phone	99 9999 9999
<<RefFax>>	Referring Doctor Fax	99 9999 9999
<<RefEmail>>	Referring Doctor Email	
<<RefQualif>>	Referring Doctor Qualification	
<<RefSpecID>>	Referring Dr Speciality ID	
<<RefSpec>>	Referring Dr Speciality Description	
<<RefLoc>>	Referring Doctor Location	
<<RefProv>>	Referring Doctor Provider Number	

[Adding SMS templates](#)

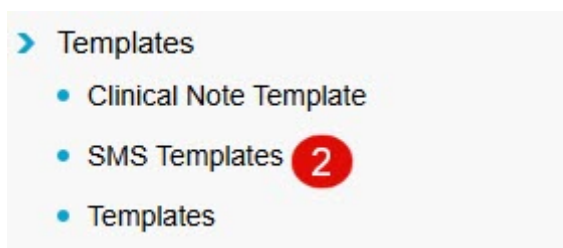
Do you regularly SMS patients? If so, you can create custom SMS templates to save time typing up

the message every time and to send tailored messages, complete with the patient's name, appointment time, serving doctor, and more.

To begin, first go to **Settings**.



Then click on **SMS Templates** under the templates menu.



This reveals the SMS templates currently available. By default, an **Appointment Reminder** template will be available to you.

Adding a new SMS template

To add a new SMS template, click on the **Add SMS Template** button.



Then, select the SMS **Type**, enter the template **Name**, and type out the SMS content in the **Description** field.

ID	4
Type	Appointments 
Name	Appointment Reminder
Description	Hi <<patfirstn>>, this is a reminder of your appointment at the <<ListLocName>> breast screening clinic on <<listdate>> at <<listtime12h>>.

SMS Tokens

You can use 'SMS tokens' which are commands that look like: <<patfirstn>> to send tailored SMS messages. The aforementioned token for instance dynamically pulls the patient's first name.

There are SMS tokens for patient details, appointment details, doctor/ practice details, referral details, and more.

For a full list of tokens, click the link below:

<https://wiki.fydo.cloud/?s=tokens>

Once you're happy with the contents of your SMS template, click **Save** and you're done! Your new SMS template will be available next time you wish to send a custom SMS message.



For some SMS Template ideas see our helpful wiki page
<https://wiki.fydo.cloud/sms-template-examples/>