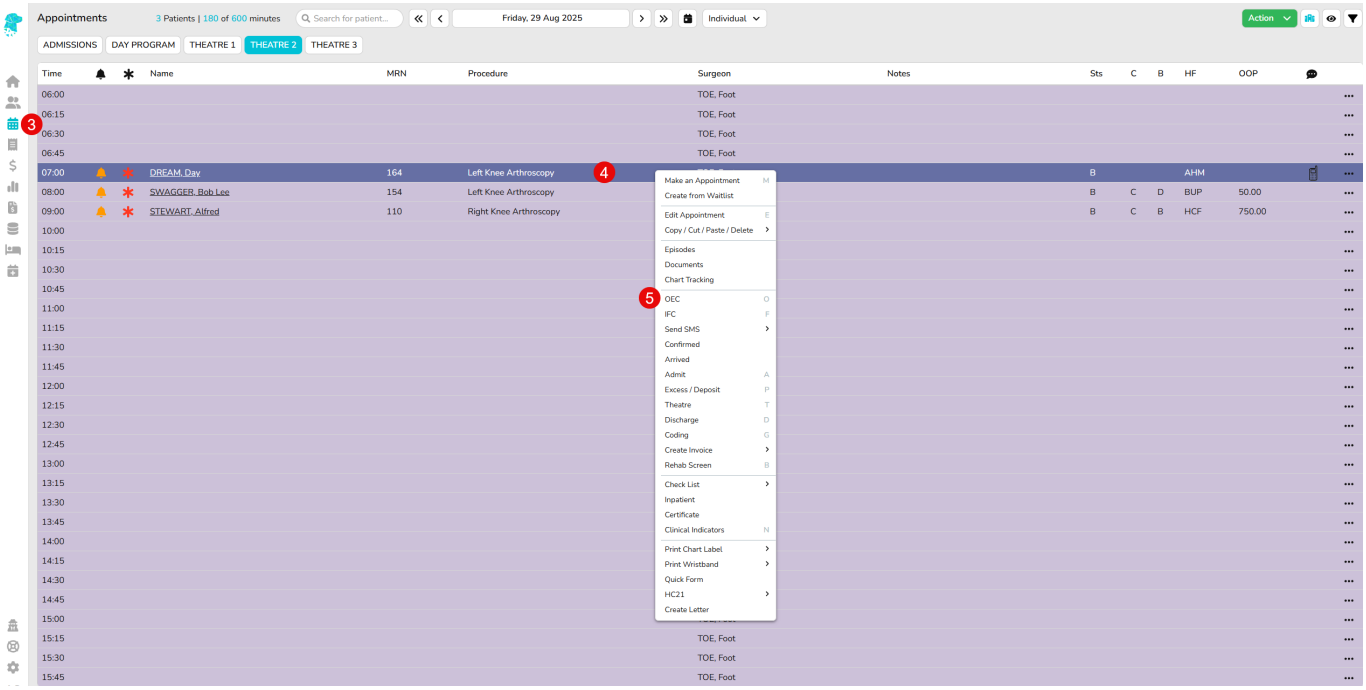
Online Eligibility Check – OEC (Hospital)

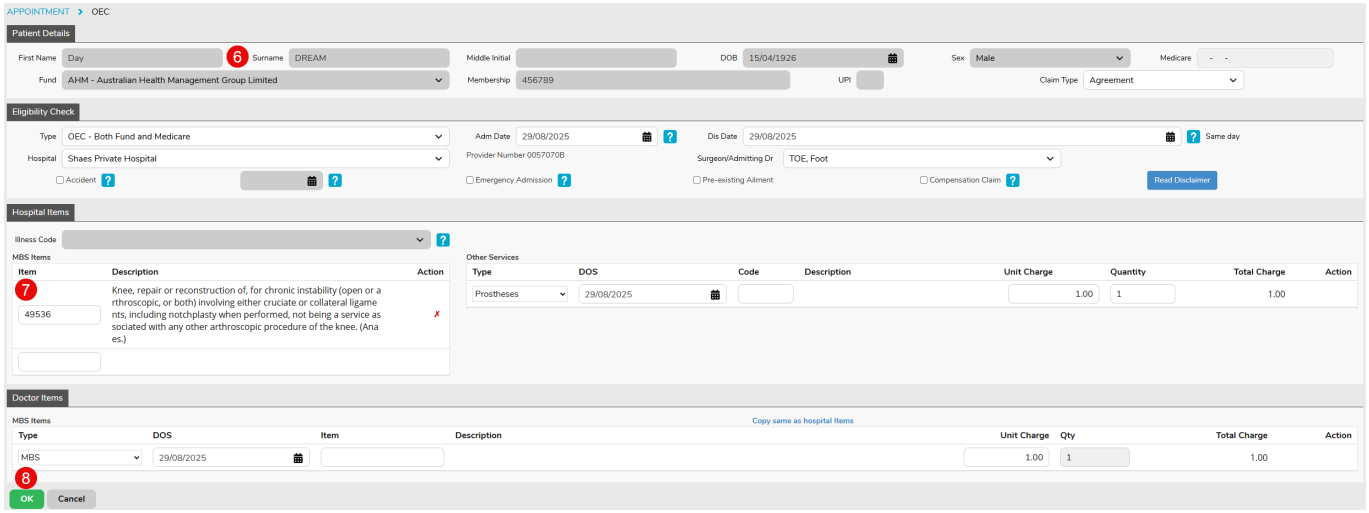
Performing an eligibility check with the patients' health fund to ensure they will be covered for their admission

1. Running an OEC from a booking ensures that all the episode information is carried into the OEC (*see "Making a Patient Booking" instructions to make an appointment*). OEC's can be done from the patient screen, however this will require more information to be entered & the excess & co-payment will not pre-populate as the OEC isn't linked to a particular episode.
2. It is also advised that the Online Patient Verification (OPV) be performed before the OEC (*see "OPV" instructions*)
3. Navigate to the Appointments screen and locate the patient you wish to perform the eligibility check for
4. Right click on the patient to expand the menu
5. Select **OEC**



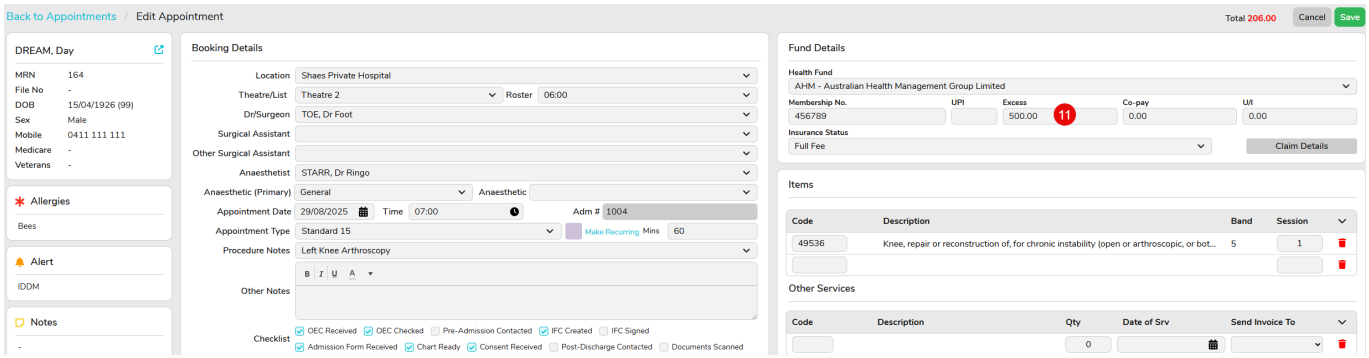
6. The OEC screen will open & the patient & appointment details will be populated with the information already entered into the system
7. If you have entered the predicted item numbers, when booking the patient, they will be carried over into the OEC screen & you will not need to enter them again.
   For procedures that do not have a specific MBS *(e.g. dental procedures)* ensure any fund specific items are removed, and the **Illness Code** field is then activated to allow checks to be performed for particular procedure types.
8. Click **OK** and a check will be performed on each item number that is entered. The check will be saved in the patient's **Documents**, when it is returned by the health fund, where it can be previewed & printed if required
9. Click **OK and Print** to have the health fund check appear on the screen to preview straight away & print if required. (*NB this function will only work if the health fund returns the*

information in a timely manner. Otherwise, it will be filed in the patients' Documents when it is returned)



10. Information returned will include:
    a. Patient Information
    b. Assessment & Explanation
    c. Admission details as entered to perform check
    d. Financial Status of the cover
    e. Pre-Existing status of the cover
    f. Illness code/Item number that check was performed for
    g. Excess amount
    h. Co-Payment amount
    i. Level of cover name
    j. Level of cover description
    k. Benefit limitations
    l. Exclusions

11. Excess amount & Co-Payment amount will automatically populate in the patient appointment, as long as it has been returned in the correct format from the health fund. If the information hasn't automatically populated, & needs to be manually entered, this can be done by:
    a. *Selecting the required booking*
    b. *Right click & select Edit Episode*
    c. *Fill in the required amounts in the Excess & Co-Pay fields in the top right of the screen*
    d. *Click* ***Save***



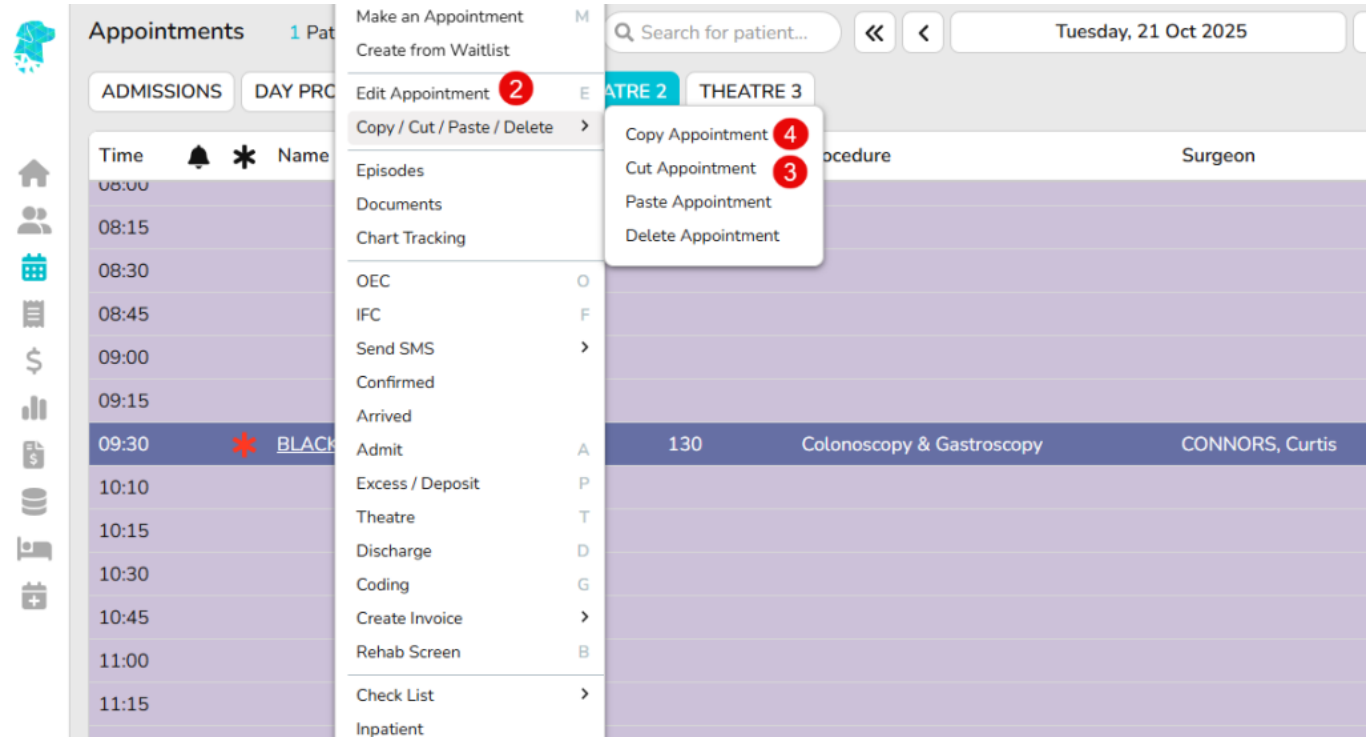
12. Carefully read all information returned by the fund to determine eligibility for admission. Including descriptions, benefit limitations & exclusions

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Move a Patient Appointment Time (Hospital)

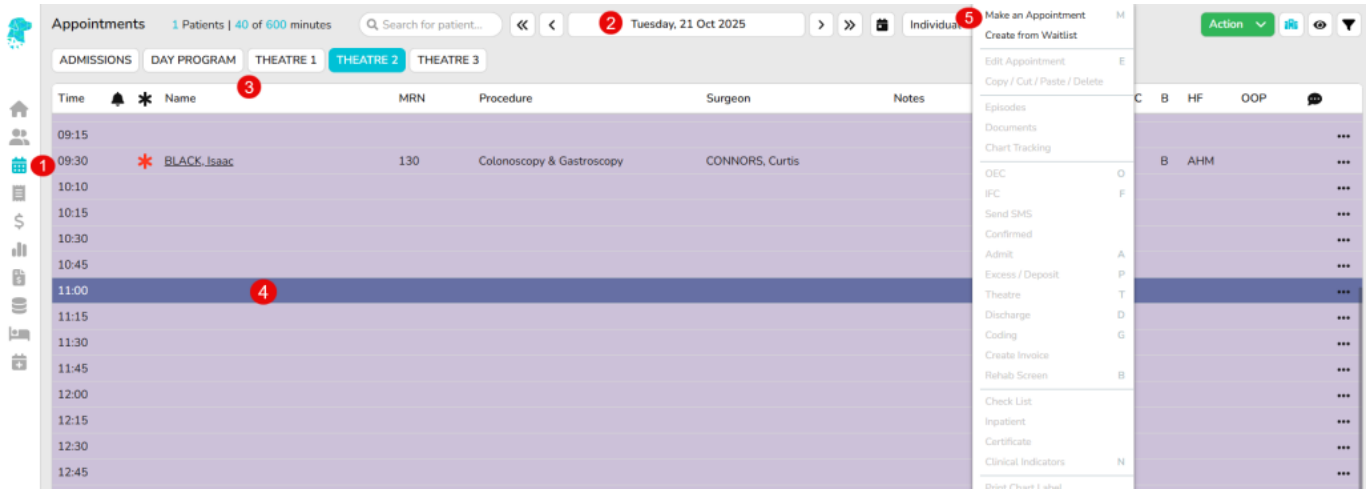
If a patients admission time changes, there are numerous ways to amend. Any one of the below options will work (you do not have to do ALL of these options in order)

1. Select the patient, **click, hold & drag** their booking to the new admission time
2. **Right-Click** and select **Edit Appointment**.
   Type the new appointment time in the **Time** field & click **Save**
3. **Right-Click** and hover over **Copy/Cut/Paste/Delete**
   Select **Cut Appointment**
   Click on the new appointment time, **Right-Click** and hover over **Copy/Cut/Paste/Delete**
   Select **Paste Appointment**
   Once the Edit Appointment screen appears, select **Save.**
4. To copy a booking select the appropriate booking
   Right-Click and hover over **Copy/Cut/Paste/Delete**
   Select **Copy Appointment**
   Select the desired appointment date & time for the duplicate
   Right-Click and again hover over **Copy/Cut/Paste/Delete**
   Select **Paste Appointment.**



Making a Patient Hospital Booking

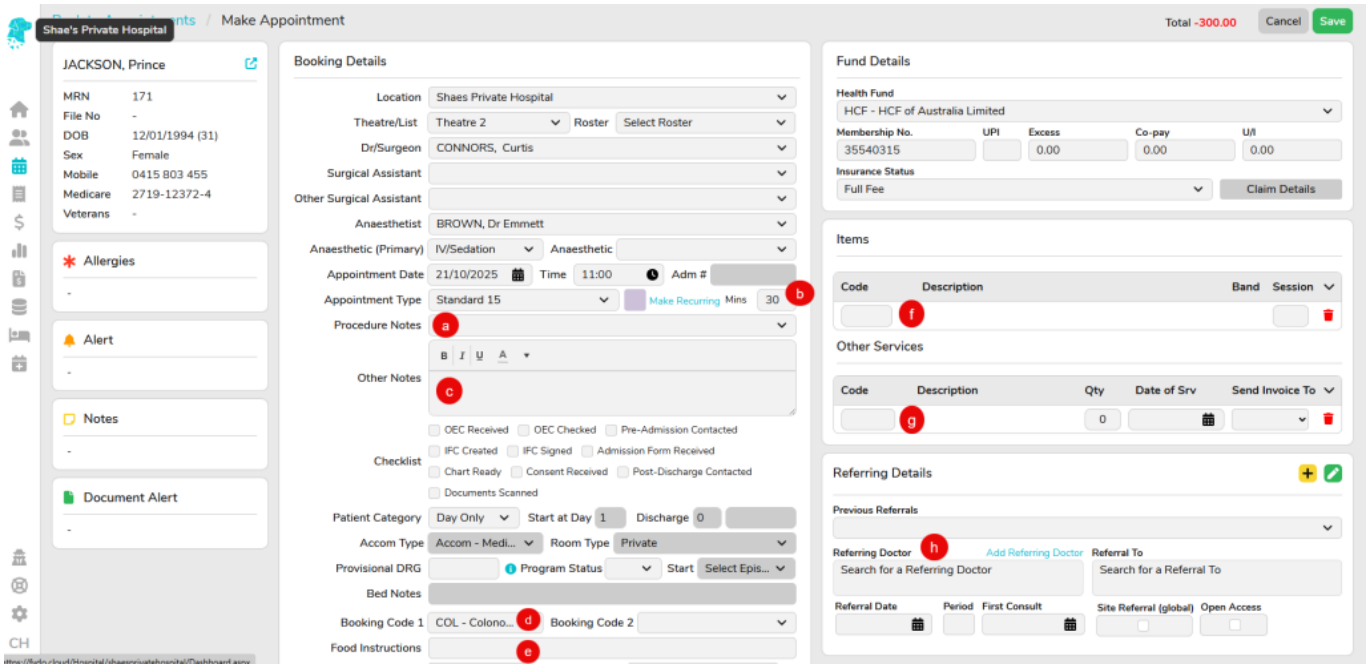
After creating a Theatre Roster patients can be booked.



1. Select **Appointments** from the main menu
2. Select **Date** that the booking is required to be made
3. Select **Theatre** where booking will be made
4. Select **Time** the booking will be made. Then **Right-Click** on this time slot to display options
5. Select **Make an Appointment** from the right-click menu
6. The **Patient Lookup** screen will be displayed to search for the required patient
7. Select a patient from the list displayed, or click **Create New Patient** if the patient isn't shown
8. If **Create New Patient** was selected, input all known patient data & click **Save**
9. If a patient was selected in Step 7 (or after the new patient details have been saved) the **Make**

Appointment screen will automatically open

10. Information relating to the theatre, surgeon, anaesthetist, appointment time etc will pre-populate if a Theatre Roster has already been entered into the system
11. Add information required according to your facility work instructions. For example:
    a. Procedure Notes
    b. Length Of Booking
    c. Other Notes
    d. Booking Code 1
    e. Food Instructions
    f. Item Numbers
    g. Other Services Codes
    h. Referring Doctor



12. Click **Save**

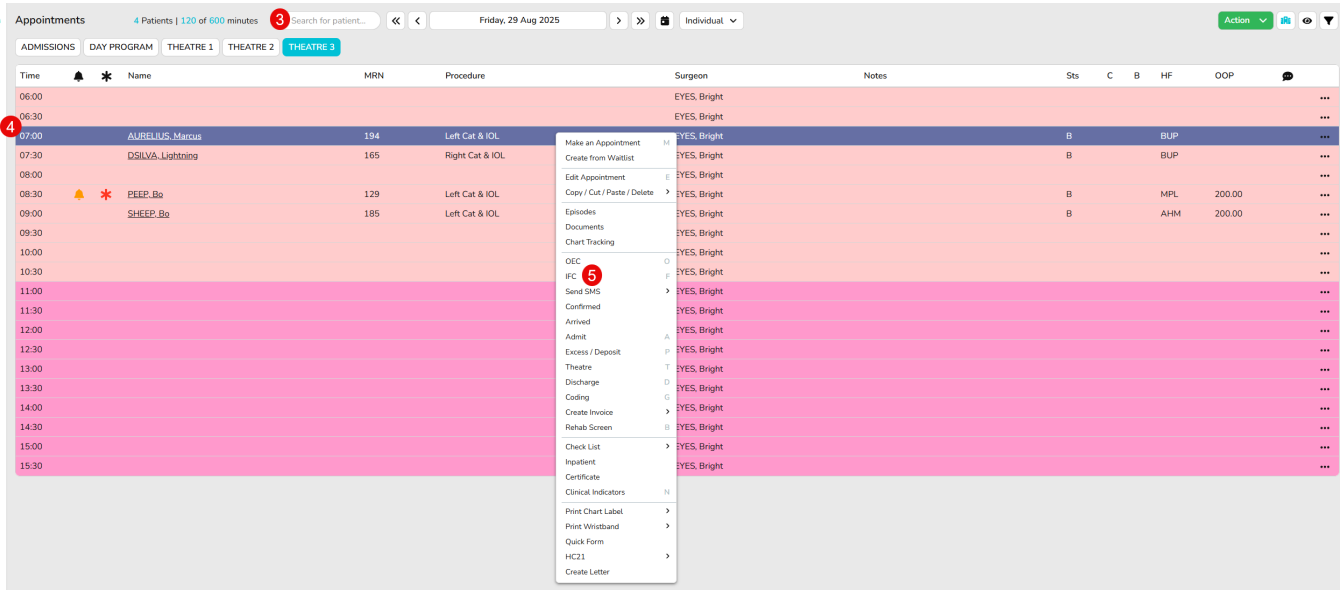
Informed Financial Consent – IFC (Hospital)

To provide patients' with information they can understand regarding the costs involved with their admission/episode

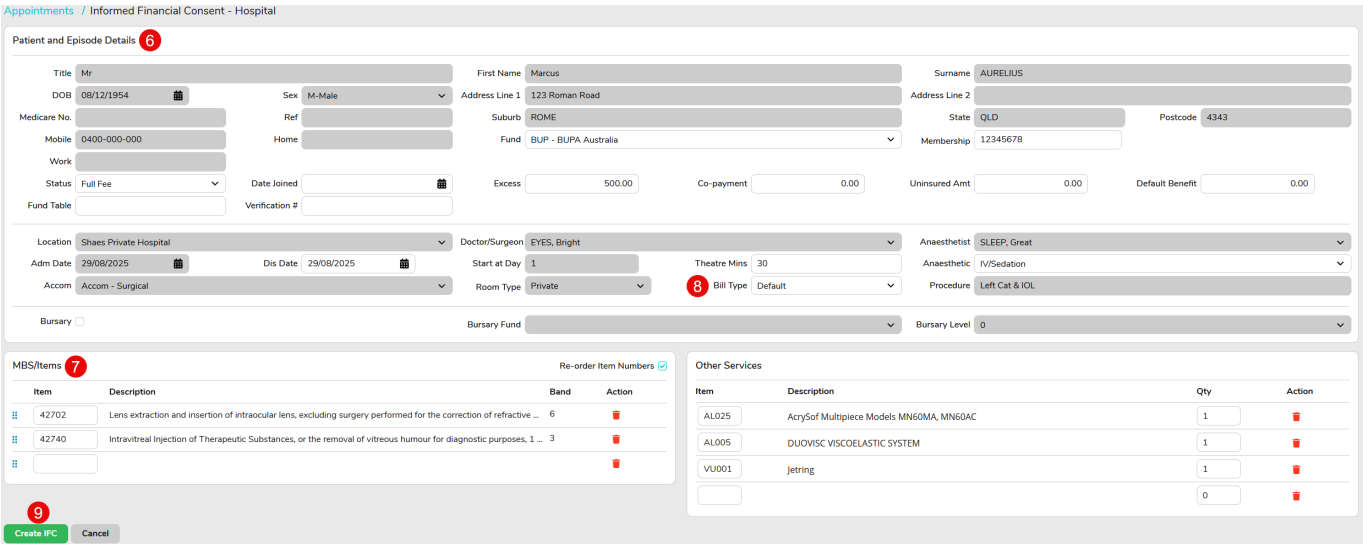
1. Before an IFC is generated it is advised to run an Online Eligibility Check (OEC) to obtain the

out-of-pocket expense for the patient (*see "OEC – Online Eligibility Check" instructions*)

2. Once the out-of-pocket cost is known, the IFC can be generated from the **Appointments Screen**
3. Search for the required patient or
4. Navigate to the admission date, theatre & time to locate
5. Right click to expand the options & select **IFC**



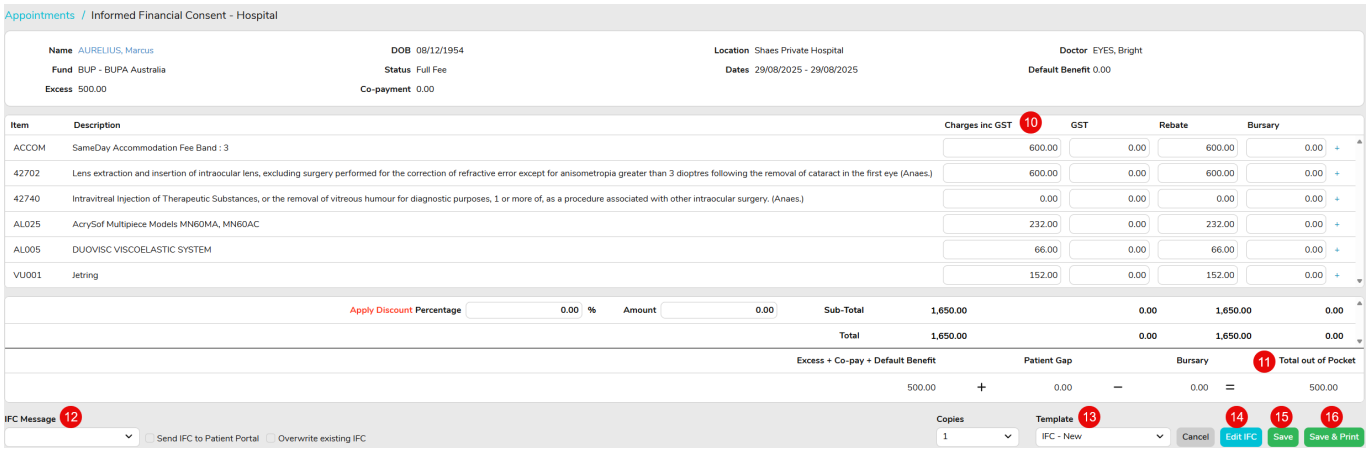
6. Patient & admission details will be pre-populated into the IFC screen
7. If Item numbers were entered at the time of booking, they will be pre-populated into the IFC screen. Otherwise add them under the **MBS/Items** heading
8. Leaving the **Bill Type** set to **Default** will allow FYDO to decide how the fees need to be raise, in accordance with the health fund contracts entered into the system
9. Click **Create IFC** to see the charges raised for each item



10. Contracted fees will be displayed
11. Patient out of pocket will be displayed
12. **IFC Message** gives the ability to add a customised message. Use the dropdown to select

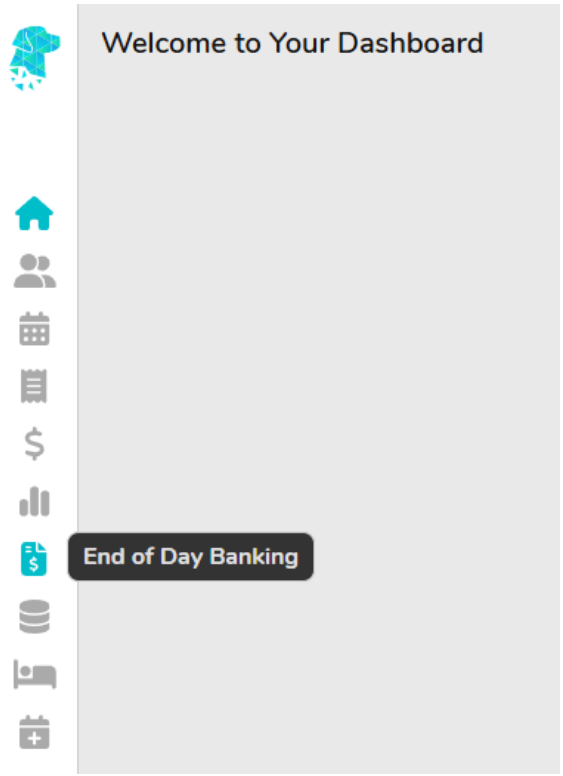
Custom Message & type the message in the field below

13. The **Template** field allows you to choose from the available IFC templates in your FYDO database.
    FYDO enables hospitals to set a default IFC template for both **insured** and **uninsured** admissions. AS a result, the **Template** dropdown will display options based on the patient's health fund.
    – If the **patient has a health fund**, the Template dropdown will show the **insured templates** available in FYDO.
    – If the **patient is uninsured –** or if their health fund is categorised as **uninsured** in the FYDO database – the Template dropdown will display the **uninsured templates** added to FYDO.
14. **Edit IFC** allows you to return to the previous screen to make any changes require to the item numbers etc.
15. **Save** will generate the IFC & save a copy in the patient **Documents**
16. **Save & Print** will generate the IFC & make it immediately available to view & print. This option will also save a copy in the patients' Documents

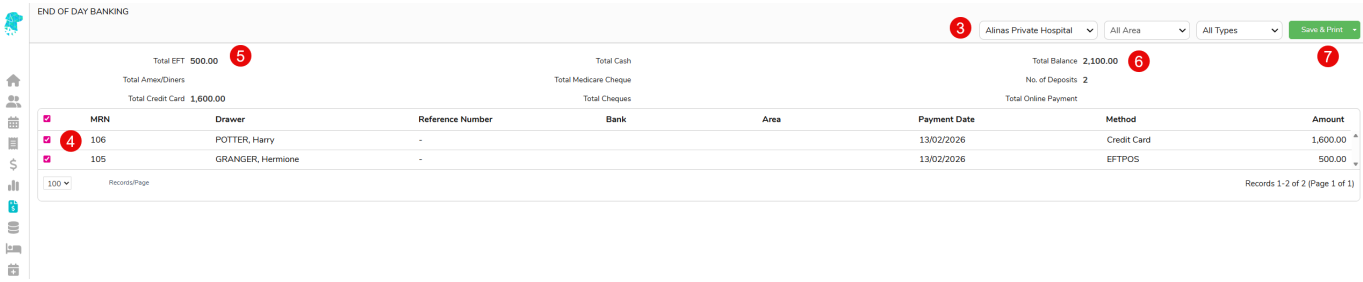


End of Day Banking (Hospital)

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



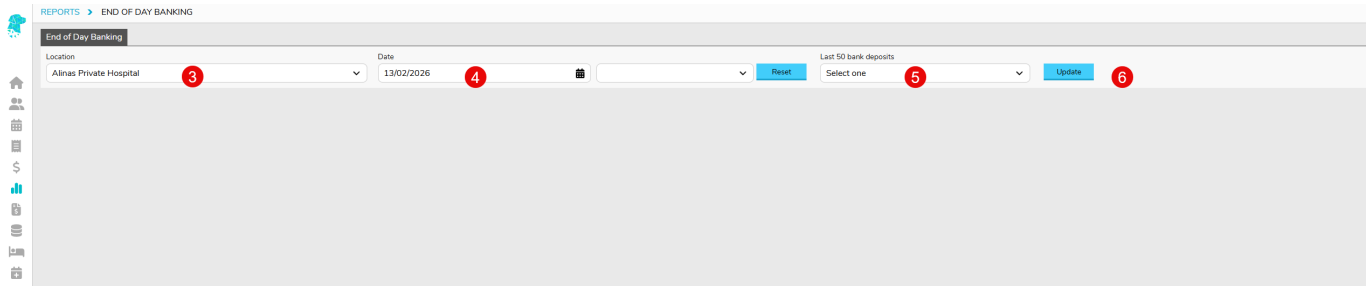
2. This will open the screen where the user can perform the End of Day Banking
3. For multi-location facilities, ensure the correct location is selected



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

Re-Setting End of Day Banking Report

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



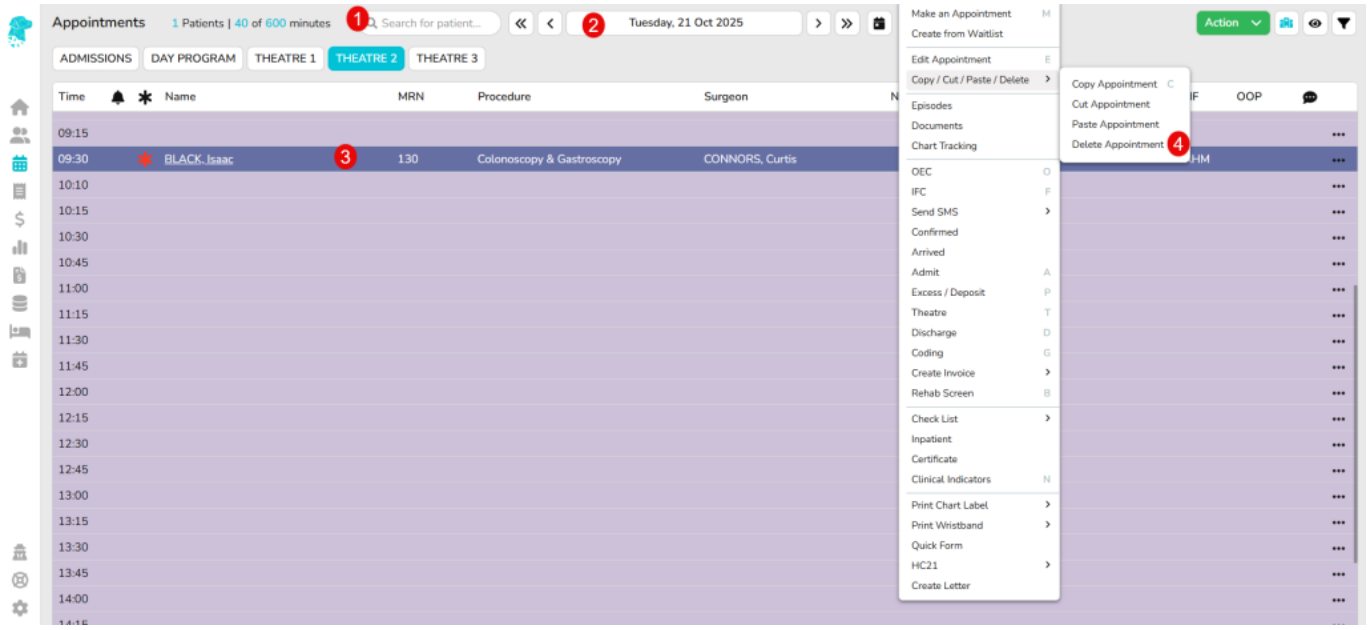
3. For multi-location facilities, ensure correct location is selected
4. Select the **Date & Time** for the required report
5. Click **Reset**
6. The transactions will now reappear in your End of Day Banking, allowing you to restart the process

---

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**

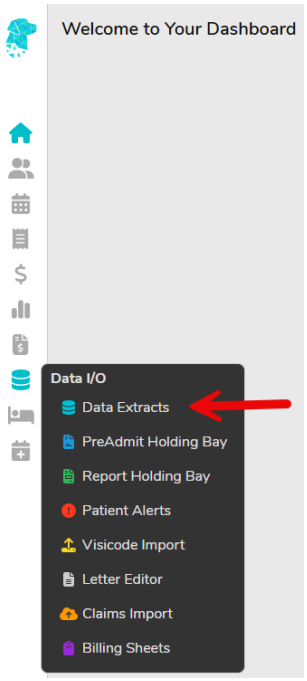


5. You will be prompted to **confirm** that you are sure you want to delete the appointment
6. Click **Yes**
7. [redacted]
   If statistical information on the cancellation is required, then please see instructions on how to **Cancel a Booking** at https://wiki.fydo.cloud/cancel-a-booking/

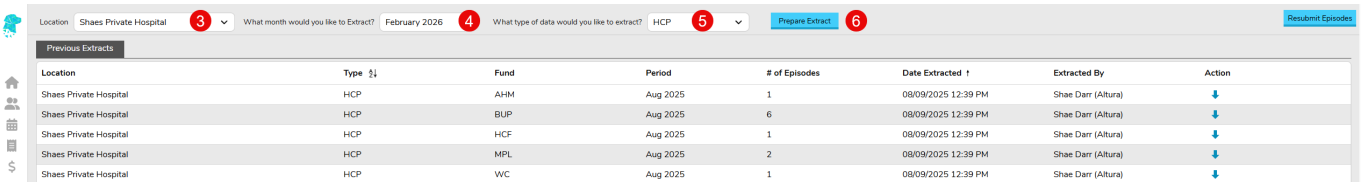
Hospital Data Extraction

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

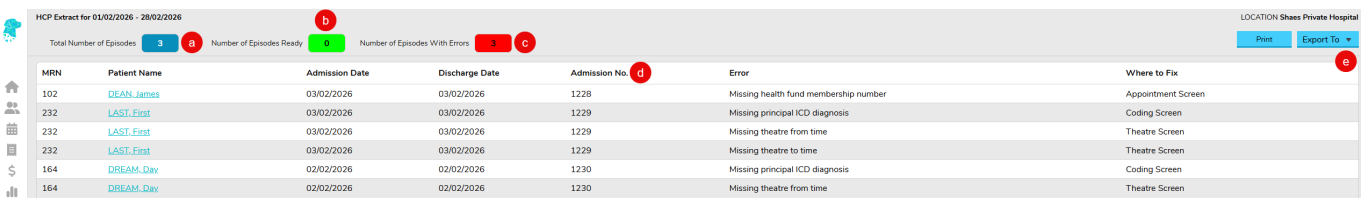
1. Select **Data I/O** from the left-hand menu
2. Select **Data Extracts**



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**



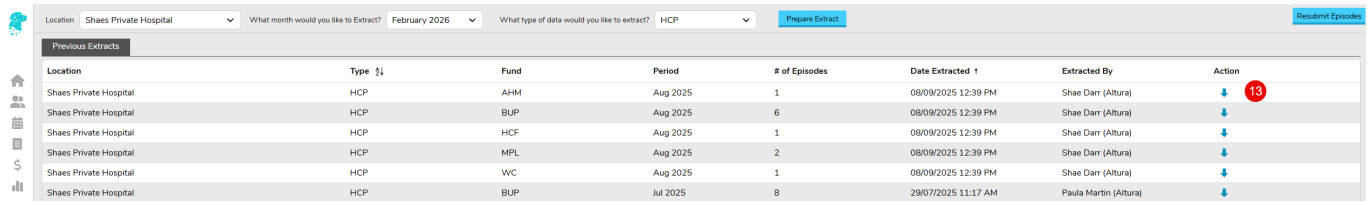
7. You will be shown:
    a. Total Number of Episodes for the period
    b. Number of Episodes Ready to be exported
    c. Number of Episodes with Errors that require attention
    d. A list of the episodes that need amendments in order to have your data ready for submission
    e. An option to print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



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.

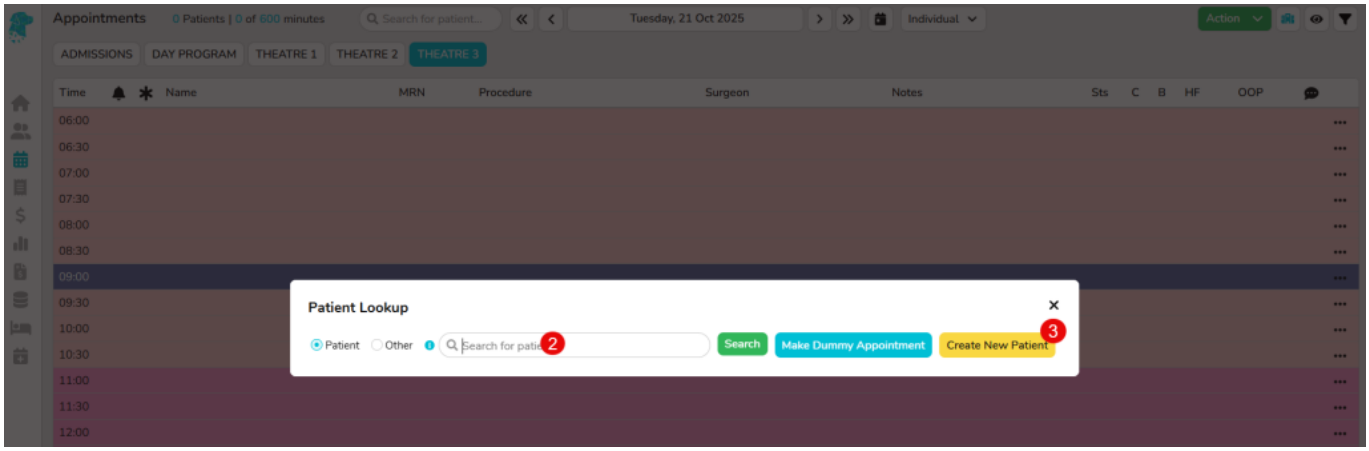


For instructions on how to **Re-Extract Hospital Data** visit our wiki page:
Re-Submitting a Hospital Data Extraction

Create a New Patient (Hospital)

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

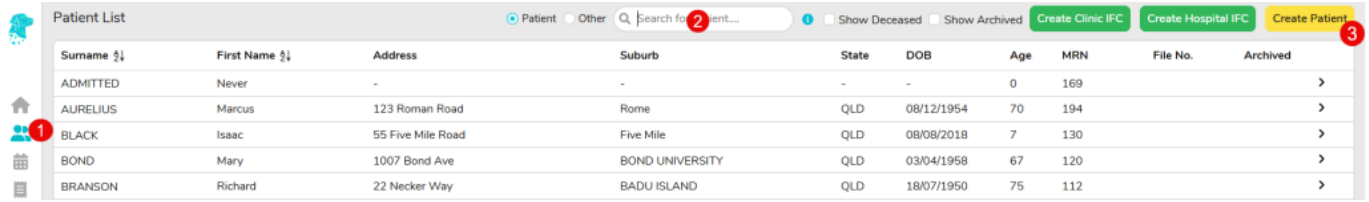
1. Once you have navigated to the date & time for the appointment, right click & select **Make an Appointment**
2. This will open up the **Patient Lookup** box where you are able to search for the desired patient
3. If you are unable to locate the patient click the **Create New Patient** button



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**

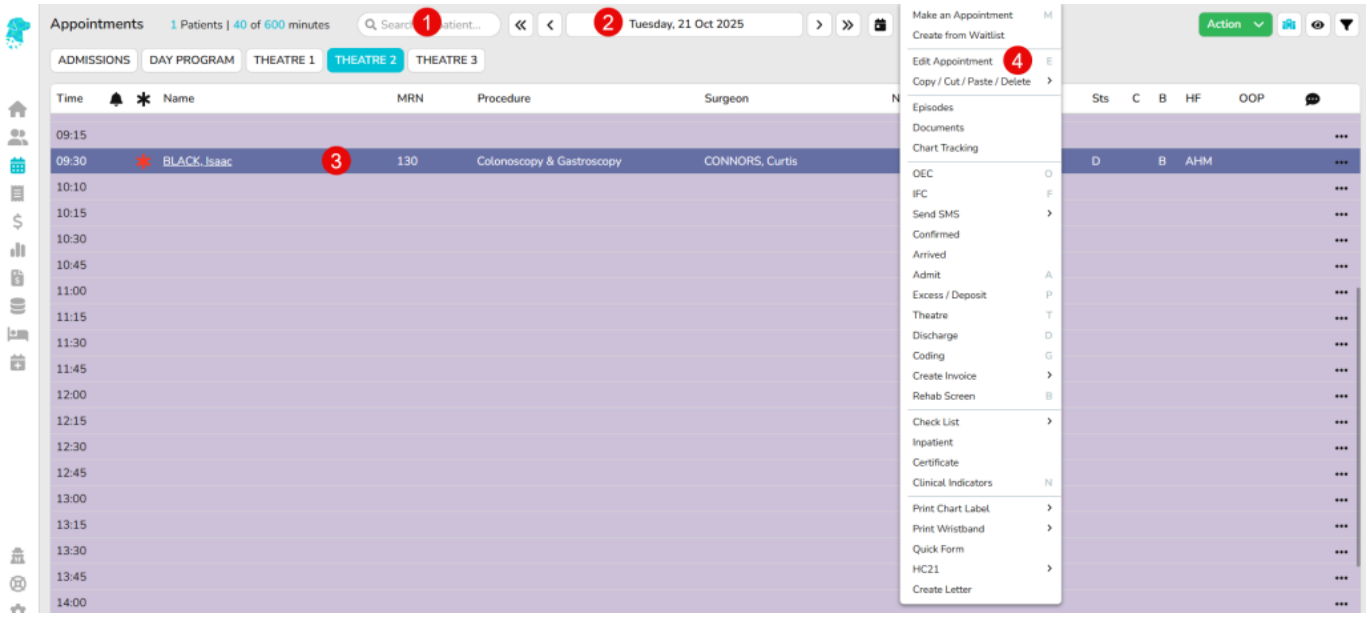


4. You are required to add a minimum of **First & Last Name** and all other fields are optional when initially adding a patient (*but be aware that certain fields may be required, once the patient is admitted, for reporting purposes*)
5. Once all desired information is entered click **Save**

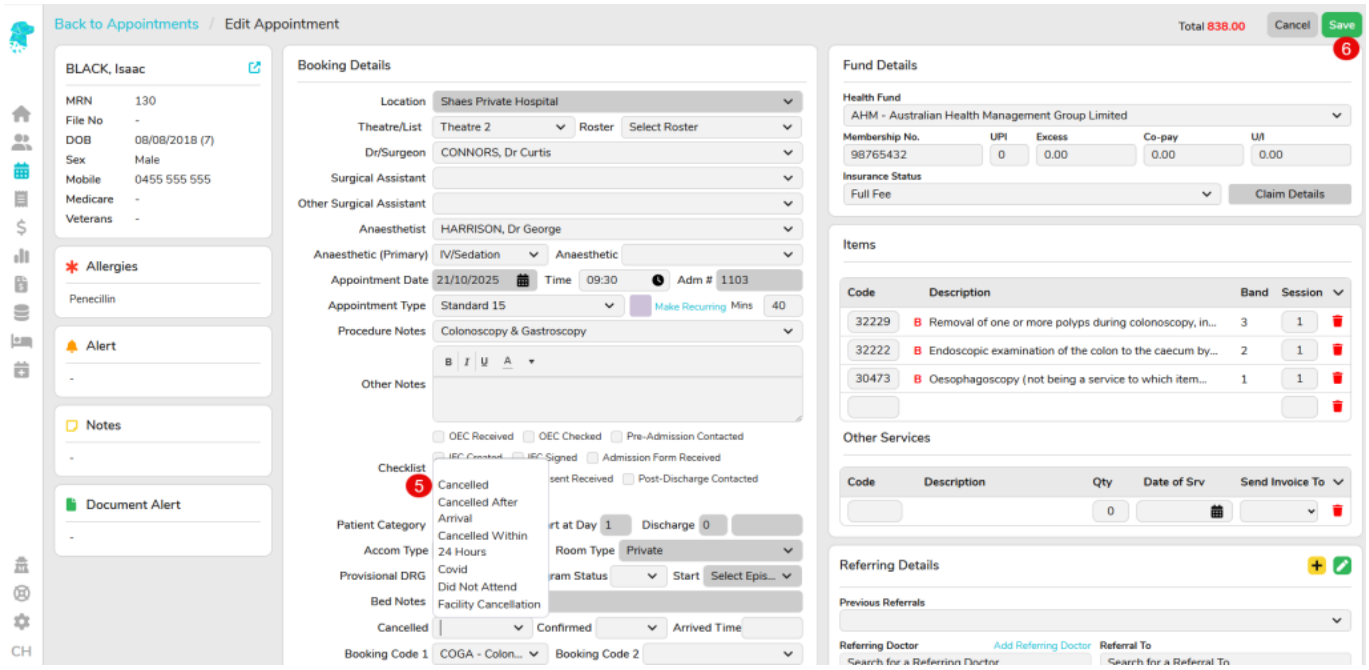
Cancel a Hospital Booking

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**



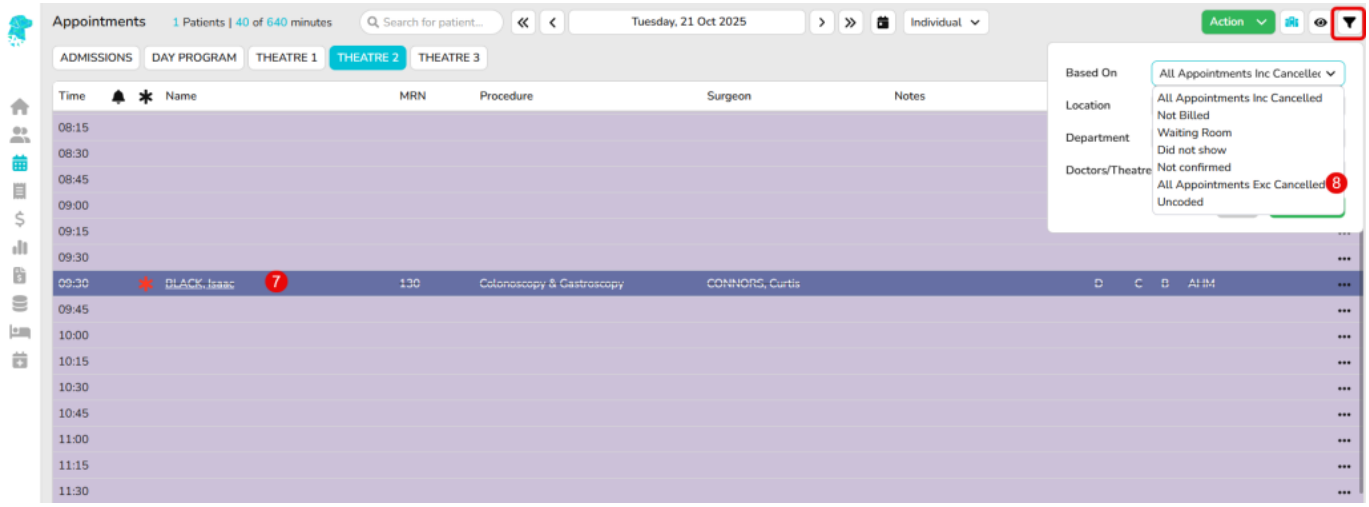
5. Use the **Cancelled** drop down to select a reason for cancellation (*N.B these cancelled reasons are fully customisable & can be added or edited in **Setting** under the **Cancelled Reasons** option to assist facilities obtain the cancellation data that they require*)
6. Click **Save**



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

available to book another patient

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



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

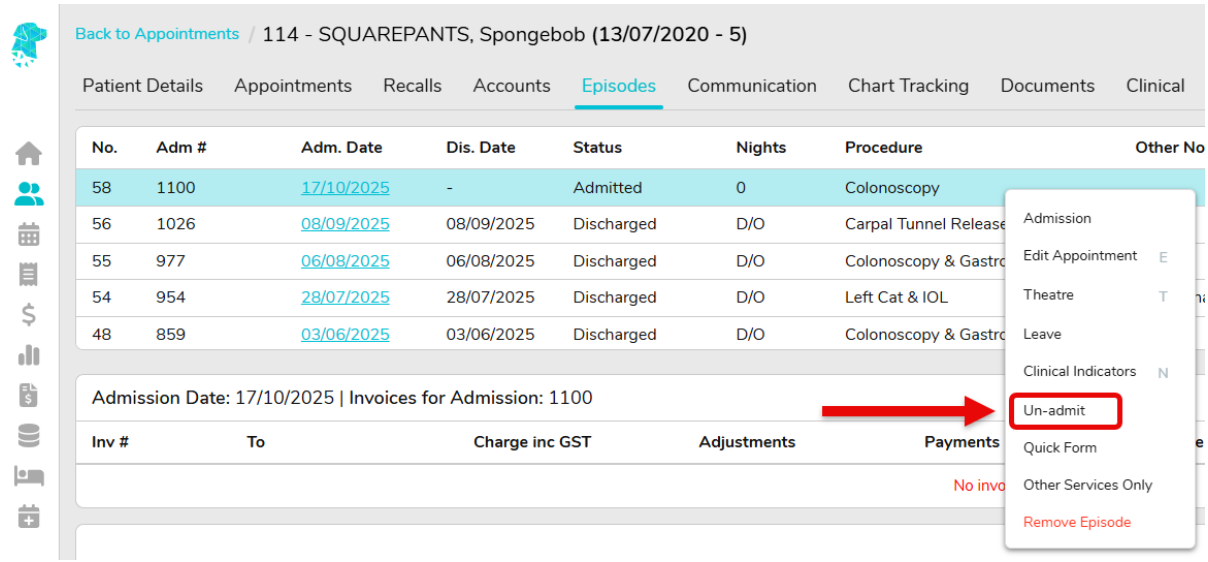
[redacted]

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:

[redacted]

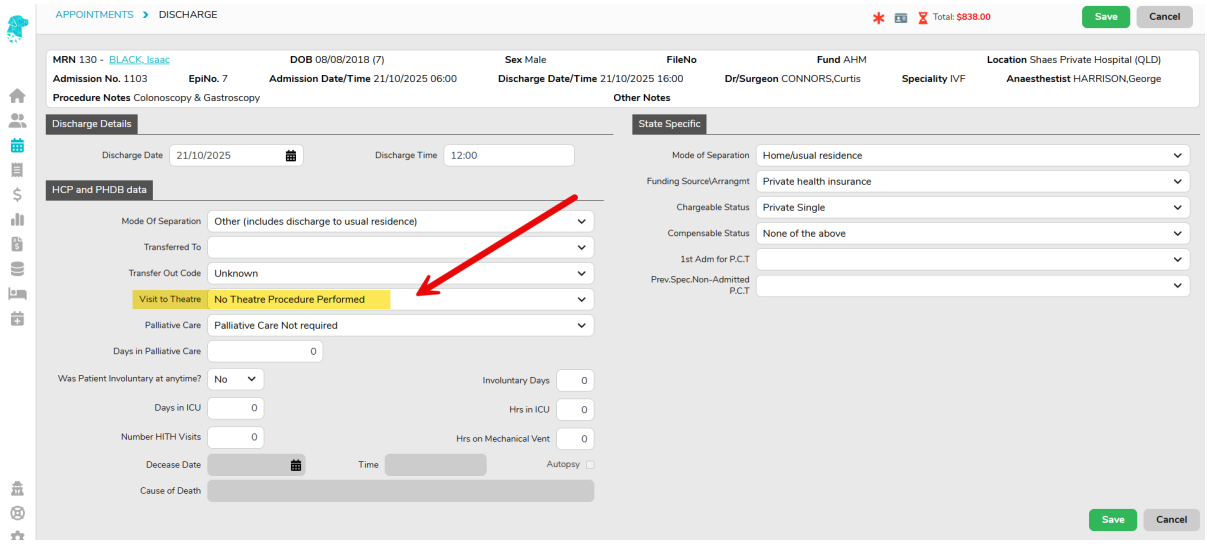
If the patient **did not arrive at the facility** and was **not admitted**, the standard cancellation instructions above will apply. The episode will not be admitted and will simply be cancelled.

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.**

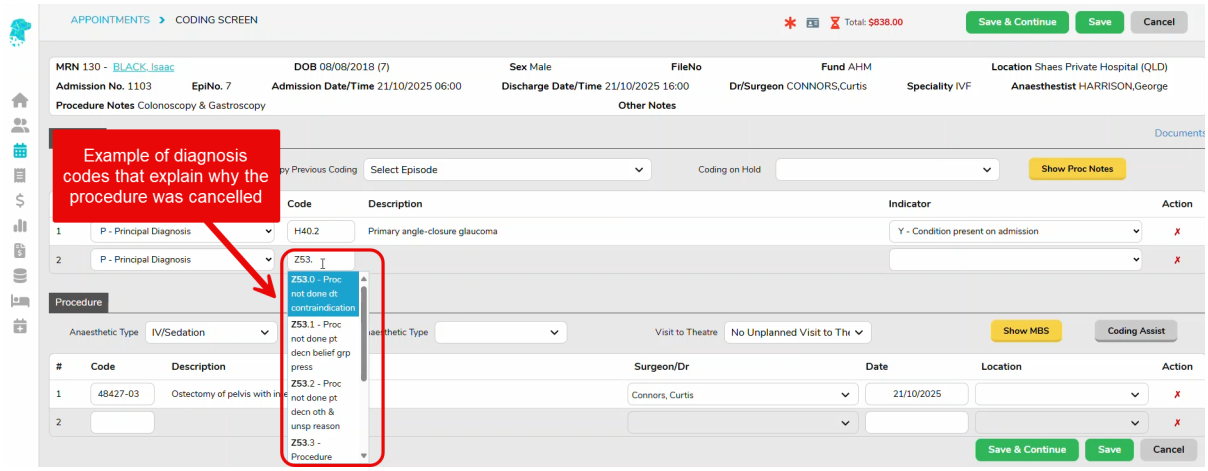


The patient may need to be **refunded** any moneys paid, or the facility may choose to keep it and apply to another admission down the track.

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.



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.

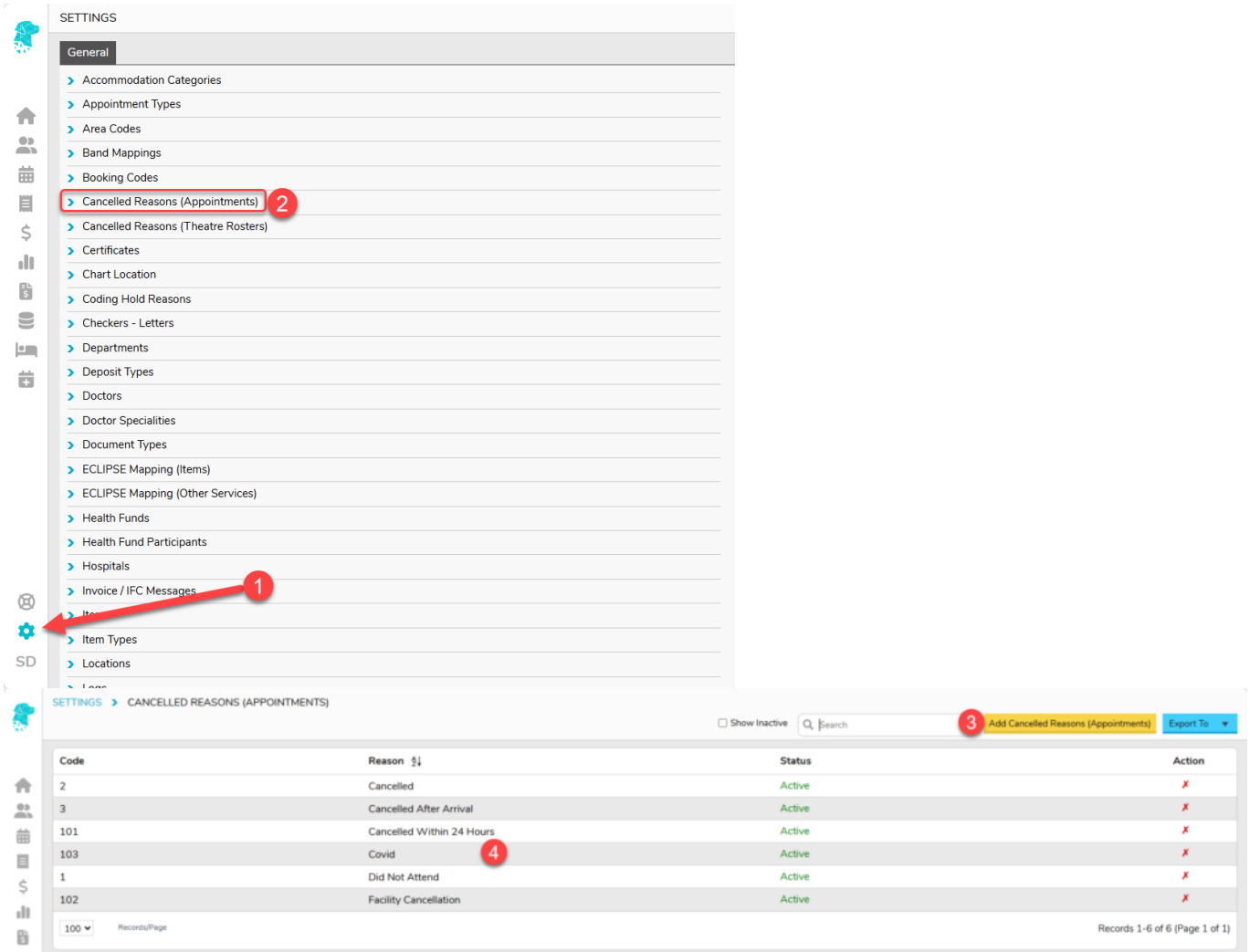


When raising an invoice, please be aware that if an **accommodation band** is billed, it is implied to the health fund that the patient received an anaesthetic. In this instance, an **anaesthetic procedure code** must also be included in the coding screen.
Facilities will need to check their individual health fund contracts in order to decide if they can raise a charge for the particular admission.

Cancellation Reasons

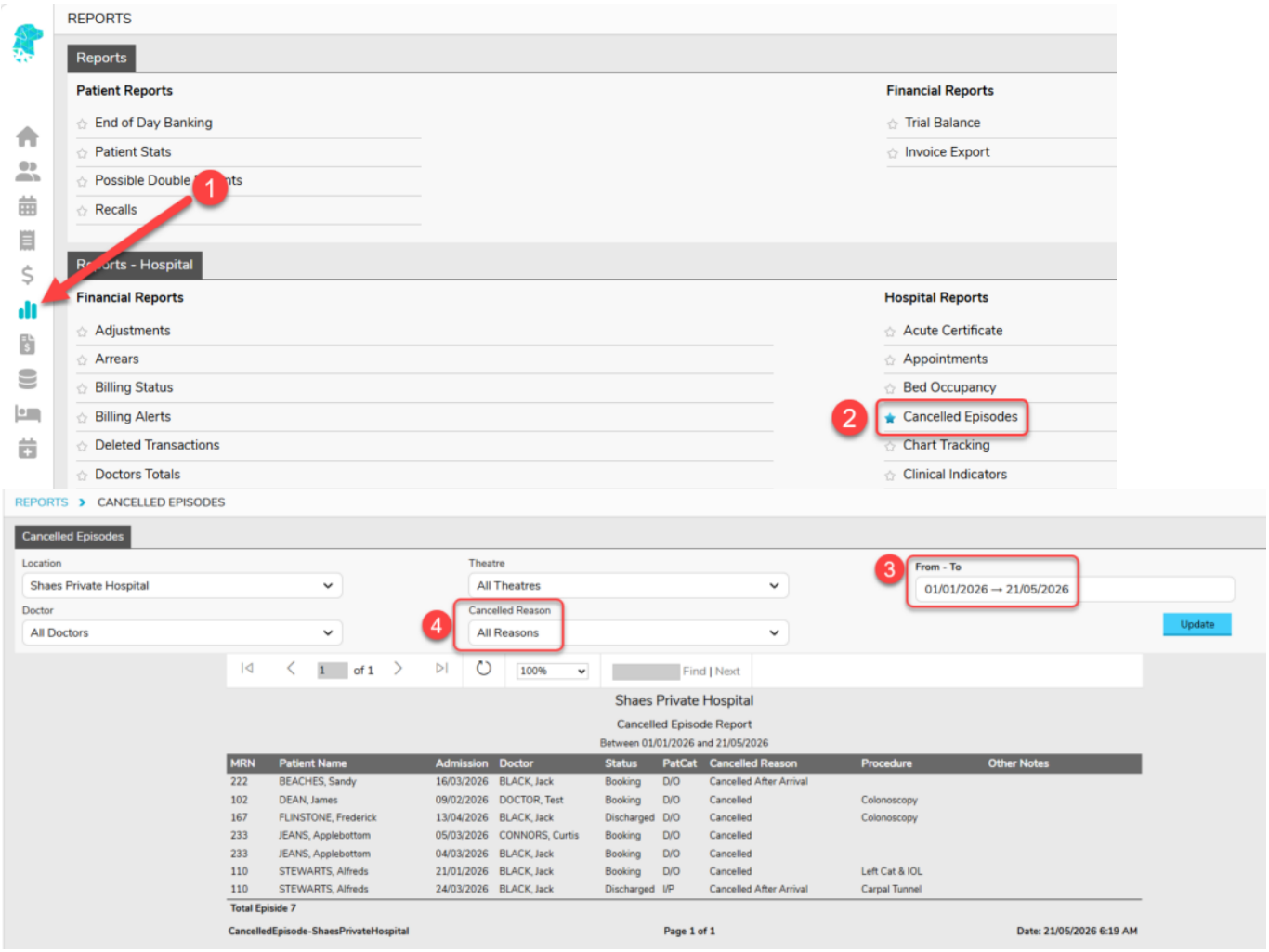
Facilities may be required to collect different cancellation information for benchmarking, auditing, accreditation, and reporting purposes. FYDO makes this easy through **customisable Appointment Cancellation Reasons.**
Statistics such as **Cancelled After Arrival**, **Cancelled Within 24 Hours, Facility 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



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



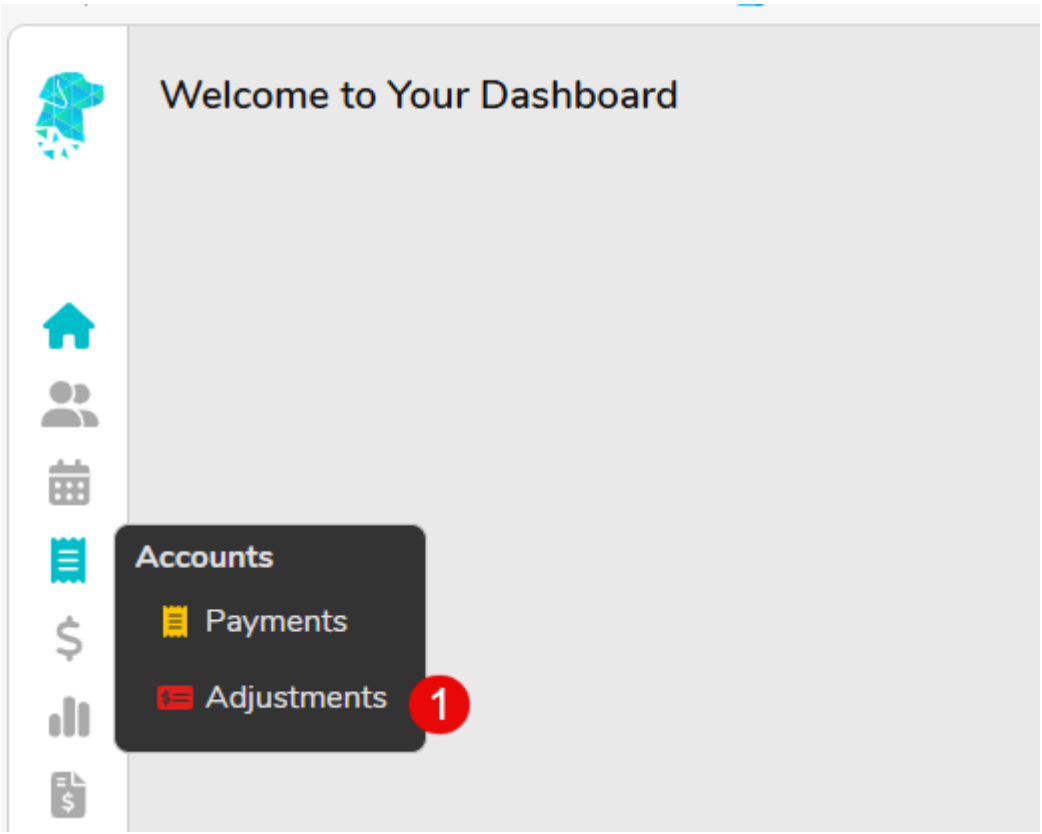
Hospital Adjustments

Adjustments via the Adjustments Screen

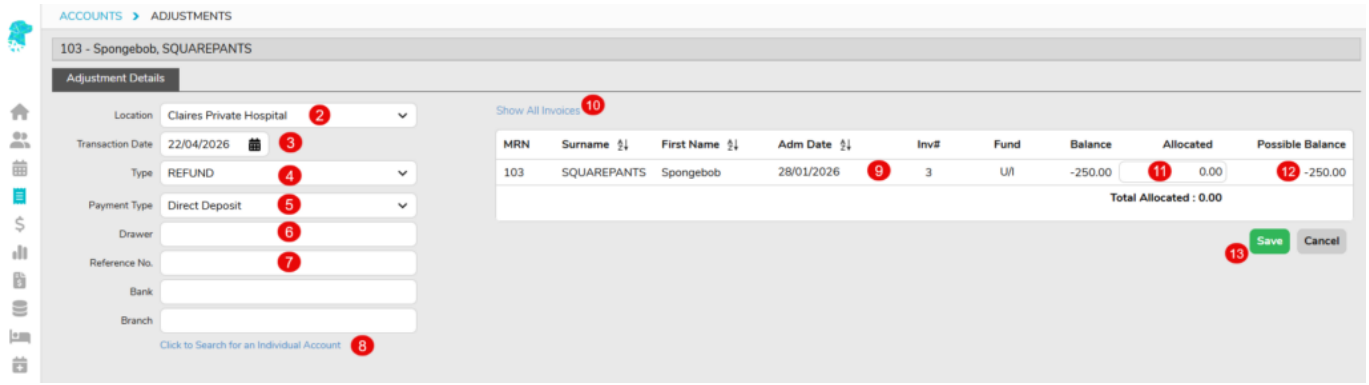
If an adjustment is required for refund, write off, incorrect billing purposes etc it can be done using the Adjustments Screen or from the Patient History / Episode screen. Both options are explained below.

Making the entry from the Adjustments Screen

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

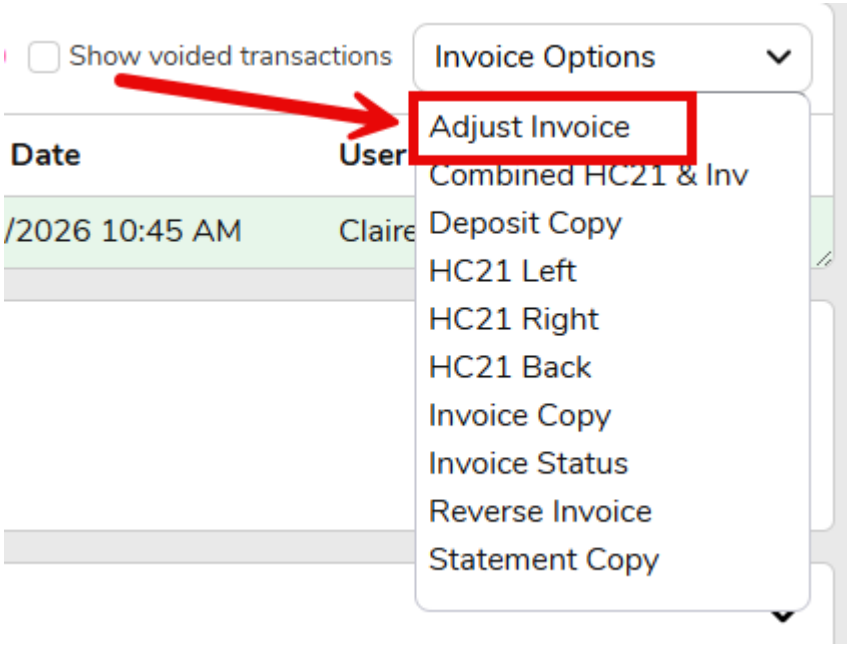


2. For multi-location systems, use the drop down to select the relevant **Location**
3. Enter the required **Transaction Date** if it differs from the current date
4. Use the **Type** dropdown to select the required transaction type e.g., write off, incorrect billing, discount, refund etc.
5. If **Refund** 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**



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**.