### **Importing Visicode Data**

#### After the data has been exported from Visicode

1. In the main menu go to Data I/O and select Visicode Import



- 2. Select the **Location**
- 3. Click Choose a file
- 4. NB. File must be in a **.txt** format to be imported. Other file formats will not work
- 5. This will produce a list of all the patient information found in the file
- 6. Click Import
- 7. This will automatically update the  ${\bf Coding}\ \&\ {\rm run}\ {\rm the}\ {\bf Grouper}$
- 8. There will be an Excel spreadsheet download for information purposes. This file will show if any of the data imported was unsuccessful.

### **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

8	Teday O Jul V 2022 V O My Tu Av Th Pr Se Bu	G Seach     G     THEATRE 1 [THEATRE 2] [THEATRE 3]	THEATRE 4	Make an Appointment Edit Episode Copy Appointment Cut Appointment Paste Appointment	Friday, 1 July 2022 IBER OF APPOINTMENTS 1 I TOTAL MINU	TES 30 of 720 Mins	ALL	INUTVICHI	WEEKLY
7		Time Name	MBN	History	Surgeon Notes	Sta C	B HF	Excess	
201	11 12 13 14 15 16 17	06:00		Unarrived	DUCK, Datty			0.00	
	18 19 20 21 22 23 24	06:30		Excess/Deposit	DUCK, Datty			0.00	
0	25 26 27 28 29 30 31	07:00		Discharge	DUCK Date			0.00	
é	Locations			Theatre	outer a s			0.00	
3	All Locations 😪	07:30		Inpatient	DUCK, Datty			0.00	
144	All Departments	08:00 POPPINS, M	ary 106	Certificate	DUCK, Datty		MPL		
斷	Doctors/Theztres	08:30		Cligical Indicators Confirmed	DUCK, Daffy			0.00	
8	All Doctors/Theatres	09:00		Send SMS	DUCK, Daffy			0.00	
12.00	Filter All Appointments inc Cancelled	09:30		Chart Label	DUCK Daffy			0.00	
23		10.00		Delete Appointment	DUCK Duty			0.00	
	Action 🔘 💿	10:00		Documents	DOCK, Damy			0.00	
	Walk Patient In	10:30		Create Letter Ouick Form	DUCK, Daffy			0.00	
	Select an action	11:00		HG21 Left	DUCK, Daffy			0.00	
		11:30		HG21 Right	DUCK, Daffy			0.00	
		12:00		Create Invoice	DUCK. Daffy			0.00	
2		12.00		iec 🔁				0.00	-
0		12:30		QEC	DOCK, Damy			0.03	
		13:00			DUCK, Daffy			0.00	
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>		14:00			DUCK, Datty			0.00	
Θ		14:30			DUCK Daffy			0.00	

- 6. Patient details & 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

Prist realing	Mary		Sun	ame POR	PPINS				DOB		11)	Gender			
Address Line 1			Address Li	ne 2					Medicare Nur	sber		Ref			
Suburb	State		Postcode		-	Mobile		Home			Work				
Excess	0.00 Co-payment	0.00	Default Benefit		0.00	Fund Table	12340678A	Ve	rification #	54	itus Pul	Date Joined		(III)	
Location	Adeney Private Test 🔍	Surgeon/Admitting Dr	Duck, Daffy		~	Bill Type	Default	~ 🖪							
Adm Date	01/07/2022 III Dis Date 01/0	7/2022	Start at Day	1		Theatre Mins	30	•	Anaesthetic	General			v		
Accom	Accom - Advanced Surgical	w.	Room Type	Private				~	Procedure	Colonoscopy & G	astroscop	у			
MBS/Items				Re-order	r Rem Numbers	Other Servic	85								
Item	Description			Ban	d Action	Item D	escription						Q:y	Ac	tion
32229	Removal of one or more polyps during colo which item 32222, 32223, 32224, 32225, 3	moscopy, in associatio 2226, or 32228 applie	n with a service 1 s (Anaes.)	0 3	×								0		×
0	Endoscopic examination of the color to the following a positive faecal occult blood test	caecum by colonosco ; or (b) who has sympl	opy, for a patient: loms consistent w	(a) ith											
32222	pathology of the colonic mucosa; or (c) with whom diagnostic imaging has shown an ab	h anaemia or iron defic phormality of the colon	ciency; or (d) for ; or (e) who is	2	*										
	undergoing the first examination following undergoing pre-operative evaluation; or (g)	surgery for colorectal o for whom a repeat co	ancer; or (f) who lonoscopy is re	is											
	Oesophagoscopy (not being a service to w	hich item 41816 or 41	822 applies).												
30473	without biopsy, not being a service associa 30479 applies. (Anaes.)	ted with a service to w	hich item 30478	у 1	*										
					x										

- 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

ETTINGS	> END OF DAY BANKING				3	✓ All Area ✓ All Types	Save & Print -
	Total EFT <b>500.00</b> Total Amex/Dinens Total Credit Card	5	Total Med	Total Cash icare Cheque btal Cheques		Total Balance 500.00 6 No. of Deposits 1	0
ø	Drawer	Reference Number	Bank	Area	Payment Date 11	Method 11	Amount
• (4)	Clampett, Eily	÷			01/06/2022	EFTPOS	500.00
100 🛩	Records/Page						Records 1-1 of 1 (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

	REPORTS > END OF DAY BANKING											
200	End of Day Banking											
	Location		Date						Last 50 bank deposits			
	Adeney Private Test	~	01/06/2022	111	Select Time	v	Reset	1	Select one	~	Update	
7	3			6					6		6	
101	-								-			
益												
Θ												
\$												
Las												
Ees	multi location facilit	:				t	100	ation in	aalaatad			

- 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  ${\bf OR}$
- 2. Navigate to the date & theatre that the patient is booked for
- 3. Select the patient & right click to open menu
- 4. Select Delete Appointment

2 Teday	< Q Search	0		NU	ABER	Make an Appointment 20 Edit Episode	22 DTAL MINUTES 30 of 7	120 Mins		AL	L INDIVIDUAL WE
Mo Tu We Th Fr Sa Gu	THEATRE 1 THEA	THEATRE 3 THEATRE	4			Cut Appointment Paste Appointment					
4 5 6 7 8 9 10	Time	Name	MBN	Procedure	Su	History Arrived	Notes	Sts	C B	HE	Excess
11 12 13 14 15 10 17	06:00				DL	Unamived					0.00
18 19 20 21 22 23 24 25 26 27 28 29 30 31	06:30				DL	Excess/Degosit Admit					0.00
	07:00				DL	Discharge					0.00
All Locations	07:30	CLAMPETT. Elly	104 3	Right CAT & IOL	DL	Coding		в		NIB	0.00
Departments	08:00		~		DL	Certificate					0.00
All Departments V	08:30				DL	Clinical Indicators					0.00
All Doctors/Theates w	09:00				DL	Send SMS					0.00
All Appointments nc Cancelled	09:30				DL	Chart Label Wristband					0.00
Action 👩 💿	10:00				DL	Delete Appointment					0.00
A Walk Patient In	10:30				DL	Create Letter					0.00
Q Find Available Appointment	11:00				DL	Quick Form HG21 Left					0.00
	11:30				DL	HC21 Right					0.00
	12:00				DL	Create Invoice					0.00
	12:30				DL	DEC QEC					0.00
	13:00				DUK	CK, Daffy					0.00
	13:30				DU	CK, Daffy					0.00
	14:00				DIN	CK Daffy					0.00

- 5. You will be prompted to **confirm** that you are sure you want to delete the appointment
- 6. Click Yes
- 7. This action is permanent & is not advised if you are required to collate data on cancelled bookings. If statistical information on the cancellation is required then please see instructions on how to **Cancel a Booking** at <u>https://wiki.fydo.cloud/cancel-a-booking/</u>

### **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.  $\overline{You}$  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	HCP Extrac	et for 01/05/2022 - 31/05/2022	mber of Episodes Ready	Number of E	pisodes With Errors	0	LOCATION Hamilton Day Surgery Centre Print Export To
	MRN	Patient Name	Admission Date	Discharge Date	Admission No.	Error	Where to Fix
4	1000	FIRST, And West	27/05/2022	27/05/2022	29576	Missing principal ICD procedure	Coding Screen
201	1000	stratig and disc.	27/05/2022	27/05/2022	29576 d	Missing principal ICD diagnosis	Coding Screen
益	1000	ALCOHOL: TOTAL	27/05/2022	27/05/2022	29626	Missing principal ICD procedure	Coding Screen
0	1000	And State Street	27/05/2022	27/05/2022	29626	Missing principal ICD diagnosis	Coding 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.

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

### **<u>Create a New Patient (Hospital)</u>**

#### There are a number of ways this can be done. Most commonly it would be done while making an appointment.

- 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

Turkey	C Q Seem	HE 2 THEATME 3 111	KTRE #	- 4	Friday, 1 (	lony 2022 e   TETRIC AMALITEE e of	120 Mes	-	NEWAY
1         1         2         1           1         5         1         5         1         5         1           1         1         1         2         2         4         5         1           1         1         1         2         2         4         2         3         1           0         1         1         1         2         1	Time (6.02 06.30 07.30 07.30 08.50 08.50	Waters -	MEX	Procedure Patient Lookup	Burgeon DUCK: Daffy DUCK: Daffy DUCK: Daffy DUCK: Daffy OLICK: Daffy	Notes	Sta C		Excess 0.00 0.00 0.00 0.00 0.00 0.00
All Appointments Inc Canadia     All Appointments Inc Canadia     White Material     White Material     White Material     There is a statem	09:30 10:00 10:30 11:00	a Palient O Other			DUCK, Daity DUCK, Daity	3			6.00 0.00 0.00 0.00
4 0 	1200 1230 1330				DUCK, Daity DUCK, Daity DUCK, Daity DUCK, Daity DUCK, Daity				6.00 6.00 6.00 6.00

- 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  ${\bf Save}$
- 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**

First Name 1	Address	Suburb	State	DOB	Age	MRN	File No.	1	Archived
Dean	4 Adeney Ava, Kew	KEW	VIC	10/01/1985	37	105			
Elly	100 Bel-Air Drive	CALIFORNIA GUL LY	VIC	08/11/1959	62	104			
Mairex	44 Lowood Street	AMPHITHEATRE	VIC	15/04/1926	96	103			
Simon	99 Reef Road	BARRYS REEF	VIC	05/01/1983	39	101			
Рорру	12 Floral Way	FLOWERDALE	VIC	12/04/2011	11	102			
								Records 1-	-5 of 5 (Page 1 of 1
	Eirst.Name 14 Dean Elly Mairox Simon Poppy	Einst Mante 12     Addrews       Dean     4 Adeney Ava, Kew       Elly     100 Bel-Air Drive       Mairex     44 Lowcod Street       Simon     99 Reef Road       Poppy     12 Floral Way	Einst Name     Address     Buburb       Dean     4 Adeney Avs, Kew     KEW       Elly     100 Bel-Air Drive     CALIFORNIA GUL LY       Mairex     44 Lowood Street     AMPHITHEATRE       Simon     99 Reef Road     BARRYS REEF       Poppy     12 Floral Way     FLOWERDALE	Einst Name     1     Address     Suburb     State       Dean     4 Adeney Ava, Kew     KEW     VIC       Elly     100 Bel-Air Drive     CALIFORHIA GUL LY     VIC       Mairex     44 Lowood Street     AMPHITHEATER     VIC       Simon     99 Reef Road     BARRYS REEF     VIC       Poppy     12 Floral Way     FLOWERDALE     VIC	Einst Name         Address         Guburb         State         DOB           Dean         4 Adeney Avs, Kew         KEW         VIC         10/01/1985           Elly         100 Bel-Air Drive         CALIFORNIA GUL LY         VIC         08/11/1959           Mairex         44 Lowcod Street         AMPHITHEATRE         VIC         15/04/1926           Simon         99 Reef Road         BARRYS REEF         VIC         05/01/1983           Poppy         12 Floral Way         FLOWERDALE         VIC         12/04/2011	Einst Name         51         Address         State         DOG         Age           Dean         4 Adeney Ava, Kew         KEW         VIC         10/01/1985         37           Elly         100 Bel-Air Drive         CALIFORNIA GUL LY         VIC         08/11/1959         62           Mairex         44 Lowood Street         AMPHITHEATRE         VIC         15/04/1926         96           Simon         98 Reef Road         BARRYS REEF         VIC         05/01/1983         39           Poppy         12 Floral Way         FLOWERDALE         VIC         12/04/2011         11	Einst Manns 1:         Address         Suburb         State         DOB         Age         MRM           Dean         4 Adensy Avs, Kew         KEW         VIC         10/01/1985         37         105           Elly         100 Bel-Air Drive         CALIFORNIA GUL LY         VIC         08/11/1959         62         104           Mairex         44 Lowood Street         AMPHITHEATRE         VIC         15/04/1928         96         103           Simon         96 Reef Road         BARYS REEF         VIC         05/01/1983         39         101           Poppy         12 Floral Way         FLOWERDALE         VIC         12/04/2011         11         102	Einst Name 1:         Address         Guburb         State         DOB         Age         MRN         File No.           Dean         4 Adeney Avs, Kew         KEW         VIC         10/01/1985         37         105             Elly         100 Bel-Air Drive         CALIFORNIA GUL LY         VIC         08/11/1999         62         104                      100 Bel-Air Drive         VIC         08/11/1999         62         104 <td>Einst Name 1         Address         Buburb         State         DOI         Age         MRN         File No.         A           Dean         4 Adeney Ava, Kew         KEW         VIC         1001/1985         37         105                                  Main   </td>	Einst Name 1         Address         Buburb         State         DOI         Age         MRN         File No.         A           Dean         4 Adeney Ava, Kew         KEW         VIC         1001/1985         37         105                                  Main

- 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

2 Tidaty 0 jul v 2022 v 0 Mo Tu We Th F) 5a 5y	Q Search     THEATRE 1     THEATRE 2     THEATRE 3     THEATRE 4	NUMBER NUMBER Copy Appointment Cut Appointment Paste Appointment	L NINUTES 30 of 720 Mins	ALL INDIVIDUAL WEEKLY
4 5 6 7 8 9 10	Time Name MRN	Procedure Su Arrived	Notes Sts C B	HF Excess
11 12 13 14 15 10 17	06:00	DL Unamved		0.00
18 19 20 21 22 23 24	06:30	Excess/Degosit DL Admit		0.00
)	07:00	DL Discharge		0.00
Locations	07:30 CLAMPETT FIN 104 2	Direct CAT & IOL DI Coding	8	NB 0.00
All Locations		Inpatient	Ŭ	113 0.00
All Departments v	08:00	OL Certificate		0.00
Doctors/Theatres	08:30	DL Confirmed		0.00
All Doctors/Theatres w	09:00	DL Seno SMS		0.00
All Appointments Inc Cancelled	09:30	DL Wristband		0.00
Action 👩 🔿	10:00	DL Delete Appointment Documents		0.00
Malk Patient In	10:30	DL Create Letter		0.00
Q Find Available Appointment	11:00	Quick Form DL HC21 Left		0.00
	11:30	DL HC21 Right		0.00
A	12:00	DL Create Invoce		0.00
7	12:30	DL QEC		0.00
	13:00	DUCK, Daffy		0.00
	13:30	DUCK, Daffy		0.00
,	- 14:00	DIRCK Daffy		0.00

- 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

							and the second sec					-		
Booking Details							Fund Details							
Location	Adeney Private Test				45	*	Health Fund	NIB - NIB Health Fur	nds Limited					
Theatre/List	Theatre 4					Υ.	Membership No.	123456	UPI 0	Excess		0.00 Co-pa	1	0,
Dr/Surgeor	DUCK, Dr.Daffy					Υ.	Insurance Status	Full Fee			~		Claim Deta	als
Surgical Assistant	Select Surgical Assistant					v								
Other Surgical Assistant	Select Other Surgical Assista	int				~	Items							
Anaesthetist	MOUSE, Dr Mickey					*								
Anaesthetic (Primary,	General	~ Anaes	sthetic None			~	Code	Description					Band	Actio
Apmt Date	01/07/2022	Time 07:30 AM		Adm # 9			49700	LENS EXTRACTION	ON AND INSERTK	ON OF INTRAC	CULAR LEN	S, excluding		×
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Other Notes	BIUA*													
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							Other Services Code Desi AL005 DUO	rription VISC VISCOELASTIC S	SYSTEM	Qty 1	Date of Srv 01/07/2022	Send Invoice Health Fund	то	Actio
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Patient Category Accom Type	OEC Received OEC     Day Only S     Accom - Advanced Surgical	Checked C Admission F lart at Day 1	Form Received Discharge Room Type Pr	Chart Ready 0		~	Other Services           Code         Desc           AL005         DUO           AL021         Alcor           Referring Details         Referring Details	ri <mark>ption</mark> VISC VISCOELASTIC S AcrySol SN60WF	SYSTEM	Qty 1 1 0	Date of Srv 01/07/2022 01/07/2022	Send Invoice Health Fund Health Fund	.To ~ ~ ~	Actic X X
Patient Category Accom Type 5 Cancellec	OEC Received OEC Day Only S Accom - Advanced Surgical	Checked Admission F tart at Day 1	Form Received Discharge Room Type Pr	Chart Ready 0 rivate Arrived Time		¥	Other Services Code Desc ALDOS DUO ALD21 Alcon Referring Details	cription VISC VISCOELASTIC S AcrySof SNBOWF	SYSTEM	Qty 1 1 0	Date of Srv 01/07/2022 01/07/2022	Send Invoice Health Fund Health Fund	το • • •	Actic X X
Patient Category Accom Type 5 Canceliec Booking Code 1	OEC Received OEC Day Only V S Accom - Advanced Surgical	Checked Admission F tari at Day 1 Confirmed Booking Cr	Form Received Discharge Proceedings	Chart Ready 0 nvate Arrived Time		2	Other Services Code Desc AL005 DUO AL021 Alcor Referring Details Previous Referrats	r <mark>ription</mark> VISC VISCOELASTIC S AcrySof SNBOWF	SYSTEM	Qty 1 1 0	Date of Srv 01/07/2022 01/07/2022	Send Invoice Health Fund Health Fund	лто • • •	Activ X X
Patient Category Accom Type Booking Code 1 Food instructions	OEC Received OEC Day Only S Accom - Advanced Surgical Cancelled Cancelled After Annual	Checked Admission P tart at Day 1 Confirmed Beoking Co	Form Received Discharge Room Type Pr	Chart Ready 0 nivate Arrived Time		2	Other Services           Code         Dess           AL005         DUO           AL021         Alcon           Referring Details         Previous Referrats	rtiption VISC VISCOELASTIC S AcrySof SNEOWF	SYSTEM	Qty 1 0	Date of Srv 01/07/2022 01/07/2022	Send Invoice Health Fund Health Fund	То • •	Activ X X
Pasient Category Accom Type 5 Gancelec Booking Code 1 Food Instructions Planned Time in Theatre	OEC Received OEC Day Only S Accom - Advanced Surgical Cancelled Cancelled After Arrival Did not attend	Checked Admission F tart at Day 1 Confirmed Sooking Co	Form Received Discharge Room Type Pr ode 2 Proced	Chart Ready 0 Invate Arrived Time		2	Other Services Code Des LL005 DUO LL021 Alcor Referring Details Previous Referring Referring Doctor	Hiption VISC VISCOELASTIC S AcrySol SN60WF ADD REFI	SYSTEM	Qty 1 1 0 Referral To	Date of Srv 01/07/2022 01/07/2022	Send Invoice Health Fund Health Fund	То • •	Actic X X X
Patient Category Accom Type Booking Cose 1 Food Instruction Planned Time Theatre Program	OEC Received OEC Day Only S Accom - Advanced Surgical Cancelled Cancelled After Arrival Did not attend	Checked Admission F tart at Day 1 Confirmed Confirmed Beoking Co Time Time NHTP N	Form Received Discharge Room Type Pr ode 2 Proced No Y ?	Chart Ready 0 Invate Arrived Time dure Time Inv Hold		2 2 X	Other Services Code Des AL005 DUO AL021 Alcor Referring Details Previous Referrias Referring Doctor Search for a Referring	Infplian INSC VISCOELASTIC S Acrylof SNBOWF Acrob REFI	SYSTEM	Oty 1 1 0 Reterral To Search for	Date of Srv 01/07/2022 01/07/2022 a Referral To	Send Invoice Health Fund Health Fund	To • •	Activ X X

- 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** and select **All Appointments Exc Cancelled**

Today	C Q Search			NU	Friday, 1	July 2022 1   TOTAL MINUTES 30 0	( 750 Mins		AL	
Me Tu We Th Fi Sa Su	THEATRE 1	HEATRE 2 THEATRE 3 THEATR	2E 4							
4 5 6 7 8 9 10	Time	Name	MRN	Procedure	Surgeon	Notes	Sts	С В	HF	Excess
11 12 13 14 15 16 17	06:00				DUCK. Daffy					0.00
18 19 20 21 22 23 24 25 26 27 28 29 30 31	06:30				DUCK, Daffy					0.00
	07:00				DUCK, Daffy					0.00
All Locations	07:30				DUCK, Daffy					0.00
epartments	07:30	7 GLAMPETT-Elly	104	Right CAT & IOL	DUCK, Dafly		8		NB	0.00
U Departments v	08:00				DUCK, Daffy					0.00
Ni Doctore/Ineatres	08:30				DUCK, Daffy					0.00
All Appointments Inc Garcelled	09:00				DUCK, Daffy					0.00
All Appointments Inc Cancelled Not Billed	09:30				DUCK, Daffy					0.00
Waiting Room Did not show	10:00				DUCK, Daffy					0.00
Not confirmed All Appointments Exc Carcelled	10:30				DUCK, Daffy					0.00
	11:00				DUCK, Daffy					0.00
	11:30				DUCK, Daffy					0.00
	12:00				DUCK, Daffy					0.00
	12:30				DUCK, Daffy					0.00
	13:00				DUCK, Daffy					0.00
	13:30				DUCK Daffy					0.00

- 9. 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

### **Hospital Appointments Screen**

### Navigating the Appointments Screen

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- 1. Ability to select required date and return to the current day using the **Today** option
- 2. Search to locate a particular patient/booking
- 3. **Date** being displayed along with **Number of patients** booked & **Minutes** the theatre is booked, & still available, for
- 4. View gives the ability to choose how the theatres are displayed
  - a. All shows all theatres for 1 day
  - b. Individual shows 1 theatre for 1 day
  - c. Weekly shows 1 theatre for the whole week
  - d. List shows all appointments in 1 list
- 5. Select which **Theatre** is required
- 6. Filter the patients viewed to include/exclude cancelled patients etc
- 7. Create **Custom Views** so that relative information can be easily displayed to enable efficient workflow
- 8. Print Theatre Lists, Send Bulk SMS's to patients & 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
- 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

212 · Ion, brady													
Adjustment Details													
Location	ACSS Bondi Hospit	tal	= ~ Q	Show All I	nvoices 10								
Transaction Date Type	15/06/2022 REFUND			MRN	Sumame 1	First Name 💱	Adm Date 💱		Inve	Fund	Balance	Allocated	Possibl
Payment Type Drawer	Direct Deposit	~ 6	0	212	Biady	Tom	02/05/2022	0	516	AHM	1,890.00	0.00	1,890.0
Reference No.											Total Alle	ocated : 0.00	
Bank			0										-
Branch	Click to Same for a	in Individual Acroun										6	Cance
Bank Branch	Click to Search for a	n Individual Acress	0									Save	Can

#### Making the entry from the Patient History / 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 **History**
- 3. Once in the Episodes screen ensure that the correct episode 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
< <practicename>&gt;</practicename>	Practice Name	
< <title>&gt;</title>	Title	
< <firstname>&gt;</firstname>	First Name	
< <lastname>&gt;</lastname>	Surname	
< <mailingadd1>&gt;</mailingadd1>	Location Address 1	
< <mailingadd2>&gt;</mailingadd2>	Location Address 2	
< <mailingadd3>&gt;</mailingadd3>	Location Address 3	