How to Delete a Billing Sheet

From the main **Billing Sheet** screen, locate the sheet you would like to delete.
*Note: You can only delete a sheet if its status is **Doctor WIP**.*

To delete a billing sheet:

- **Hold down** on the sheet you wish to delete
- Tap **Delete Sheet** on the pop-up that appears

- Confirm by tapping **Delete Sheet** again in the second pop-up

Once deleted, you'll see a green confirmation banner: **"Billing Sheet Deleted Successfully"**

How to Create a Billing Sheet

Tap on the **Sheets** icon at the bottom of the screen.
This is where you can create, view and manage all billing sheets.

On the **Billing Sheet** screen, tap the **+** icon in the top right corner.

On the **Add Billing Sheet** window:

1. **Doctor** – select from the dropdown
2. **Date of Service** – set the date using the calendar
3. **In Hospital** – tick if applicable
4. **Hospital** – if In Hospital is ticked, select a hospital from the dropdown
5. Tap **Create Sheet**

Inside your newly created sheet, tap the **+** icon in the top right corner.

Use the search bar to find an existing patient or tap the **+** icon in the top right corner to create a new patient.

If you're creating a new patient, enter the details for the patient.
At a minimum, you **must add**:

- **First Name**
- **Surname**

Other fields such as Date of Birth, Medicare Number, Health Fund, etc are optional.
After the patient details have been entered, tap **Create Patient**.

After selecting a patient or creating a new patient, you'll be taken to the **Billing Information** screen.
Here you can review and edit the following fields:

- **Doctor**
- Tick **In Hospital** or **Surgical Assistant** *if applicable*
- **Hospital**
- Add **Gap Amount**, **Referring Doctor** or a **Note to Billing Team** – *optional*

Once done, scroll down and tap **Add Item Numbers**.

On the **Add Item Number** screen:

- Confirm the **Date of Service (DOS)** is correct. If it needs to be changed, simply tap the date field to make any changes before continuing.
- Tap the **Enter Item** field

- Type the item number (e.g. 110) and tap **Search**
- Tap the appropriate item

Optional: Add a Note or more Items

- You can tap **Note** to add a specific item note *(e.g. Time of Service 9am)*
- To add another item number for the same patient, tap the blank **Enter Item** field and repeat the process above.

Once all the required Dates of Service and Items have been added, tap **Add Files / Photo**.

After adding item numbers, **upload files or photos** where required — such as documents that include the patient's following details:

- **Referral information**
- **Date of Birth (DOB)**
- **Medicare Number**
- **Health Fund details**
- **Work Cover / Third Party details**

*If this is an existing patient and no details need to be updated or added, you can skip ahead to **Preview Billing Summary**.*

Once uploaded, tap **Preview Billing Summary**.

On the **Billing Summary** screen:

- Review all information entered – Billing Details, Referral Details, Items and any attached files/photos
- Tap **Save Entry** to add the patient to the billing sheet

After saving the entry, you'll return to the **Billing Sheet** screen.
From here, you can either:

- Tap the **+** icon in the top right corner to add another patient
- To finalise and submit the sheet, tap the **<** icon to return to the main **Billing Sheet** screen and follow the steps in [**How to Submit a Billing Sheet**]

How to Submit a Billing Sheet

From the main **Billing Sheet** screen, locate the sheet you would like to submit *(status will show as Doctor WIP)*.

To submit a billing sheet:

- **Hold down** on the sheet you wish to submit
- Tap **Submit Sheet** on the pop-up that appears

- Confirm by tapping **Submit Sheet** again in the second pop-up

Once submitted, you'll see a green confirmation banner: **"Billing Sheet Submitted Successfully"** The status will now show as **Submitted** with the date.

How to Delete a Patient from a Billing Sheet

From inside the **Billing Sheet**, locate the patient you would like to delete.

To delete a patient:

- **Swipe left** on the patient you wish to delete
- Tap the **Trash Can** icon

- Confirm by tapping **Delete Patient** on the pop-up that appears

Once deleted, you'll see a green confirmation banner: **"Billing Patient Record Deleted Successfully"**

How to Sign In on the Mobile App

When you first open the FYDO Mobile app, you will be brought to the screen below.

Enter your **Unique ID** and tap **Continue to Sign In**

You'll now be taken to the **Sign In** screen.

Enter your email and password, then tap **Sign In**.
If you created your account with a Microsoft or Google account, tap **Sign in with Microsoft** or **Sign in with Google** and follow the prompts.

The next screen you'll see is the Two-Step Verification setup.

Tap **Send Code** to receive a verification code via SMS. If you prefer to receive the code by email, select **Send code via Email**, then tap **Send Code**.

Enter the code you received via SMS or Email, tick "**Remember me for 30 days**" *(optional)* and tap **Verify**.

It's time to choose your PIN for quick and secure access.

Tap the white circles under **New PIN** to enter your chosen PIN number.

All done! You're now logged into the FYDO Mobile App