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.

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

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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

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

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

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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**.

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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.

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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

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

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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.

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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

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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**.

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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

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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**

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