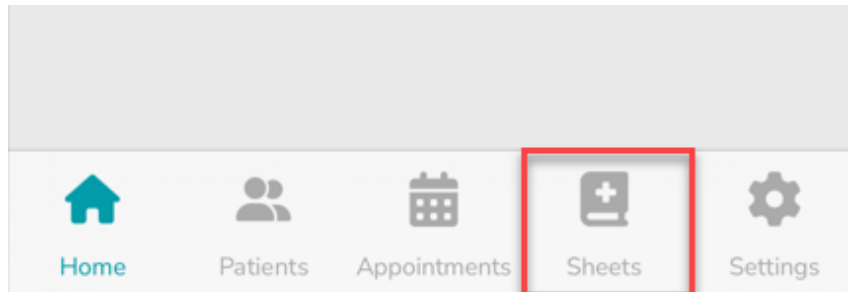
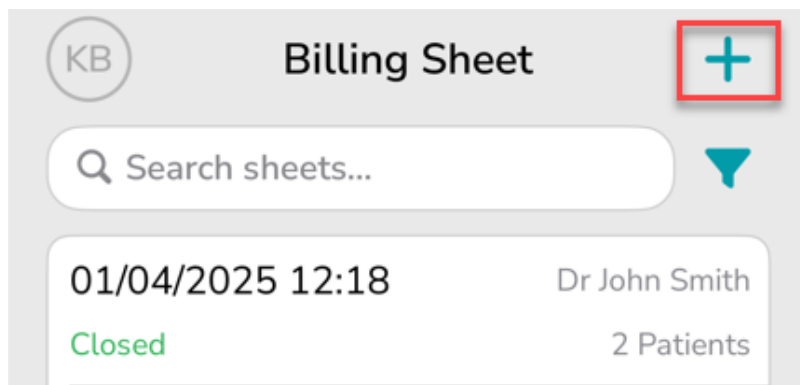


How to Create a Billing Sheet

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**

Add Billing Sheet

Doctor ✓ 1

Date of Service 2

In Hospital ☒ 3

Hospital ✓ 4

5

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

< 30/05/2025 13:12 +

Q Search for patient...

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

< Select Patient +

Q Search for patient... ▼

JA ADAM, Jake
MRN: 124 (10/02/1980)

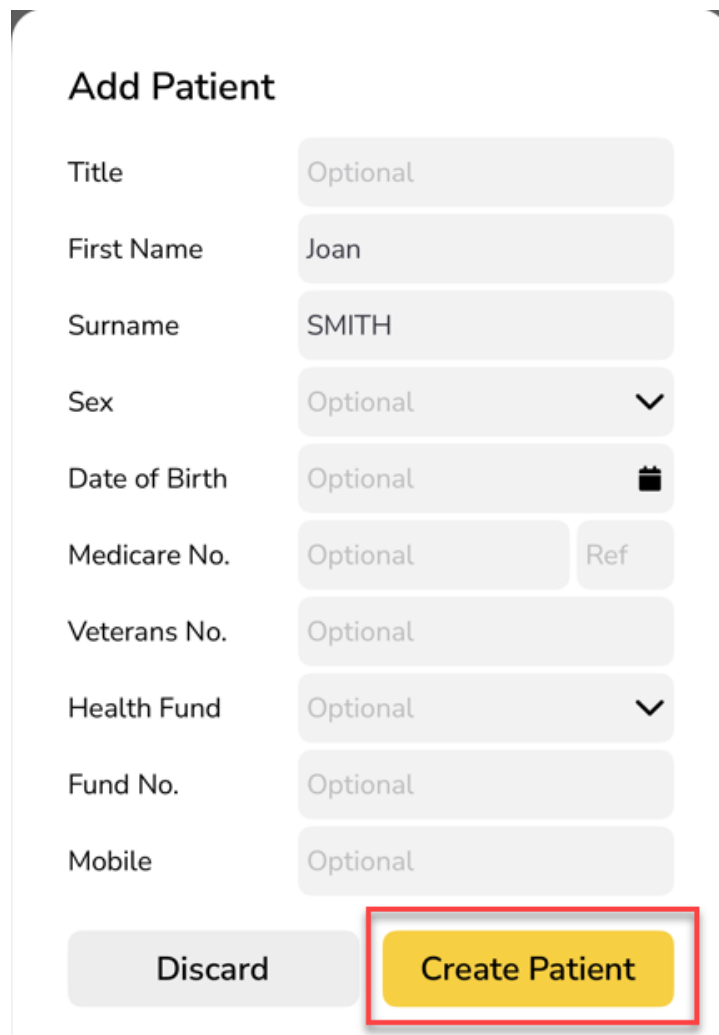
GA ADAMS, Glenn
MRN: 133 (25/06/1948)

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**.



Add Patient

Title Optional

First Name Joan

Surname SMITH

Sex Optional ▼

Date of Birth Optional 📅

Medicare No. Optional Ref

Veterans No. Optional

Health Fund Optional ▼

Fund No. Optional

Mobile Optional

Discard 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**.

<
Billing Information

SMITH, Joan

Billing Details

Doctor

SMITH, John

In Hospital

Surgical Assistant

Hospital

ABC Test

Known Gap

Gap Amount

Note to Billing Team

Referring Details

Referral Flag

Previous Referrals

Referring Doctor

<
Billing Information

Hospital

ABC Test

Known Gap

Gap Amount

Note to Billing Team

Referring Details

Referral Flag

Previous Referrals

Referring Doctor

Referral Date

Period

First Consult

Referral To

Site

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**.

Add Item Number

SMITH, Joan

DOS		Item	Pats	Note
26/05/2025		110		Note
26/05/2025		Enter Item		Note

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**

< Upload Files / Photo

SMITH, Joan

Upload File or Take Photo

Upload File

Take Photo

Preview Billing Summary

*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**.

< Upload Files / Photo

SMITH, Joan

Upload File or Take Photo

Upload File

Take Photo

captured image

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

<
Billing Summary

SMITH, Joan

Billing Details

Doctor
SMITH, John

In Hospital
☒

Surgical Assistant
☐

Hospital
ABC Test

Known Gap
☐

Gap Amount
\$0.00

Note to Billing Team

Referring Details

Referral Flag

Previous Referrals

Referring Doctor

Referral Date Period First Consult

Referral To Site

Items

DOS	Item	Pats	Note
26/05/2025	110		View

captured image

Save Entry

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](#)

<
30/05/2025 13:12
+

Search for patient...

SMITH, Joan
26/05/2025

Dr John Smith
ABC Test