

# Patient appointment and billing checklist

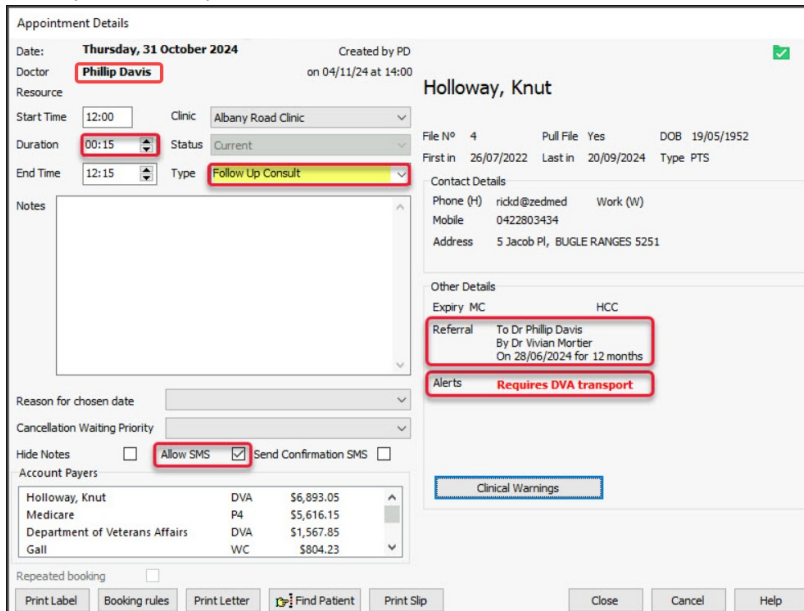
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What to check in the appointment and patient record when making a booking or attending a patient.

## What to check in Appointment Details

Double-click the patient's booking to open the **Appointment Details** screen and check.

- The appointment **Duration** is correct for the appointment **Type** and **Doctor**.
- **Allow SMS** is ticked.
- Some patients may have a **Referral** or **Alerts** noted.



Appointment Details

Date: **Thursday, 31 October 2024** Created by PD on 04/11/24 at 14:00

Doctor: **Phillip Davis**

Resource: **Holloway, Knut**

Start Time: 12:00 Clinic: Albany Road Clinic

Duration: 00:15 Status: Current

End Time: 12:15 Type: Follow Up Consult

Notes:

File N° 4 Pull File Yes DOB 19/05/1952

First in 26/07/2022 Last in 20/09/2024 Type PTS

Contact Details

Phone (H) rickd@zedmed Work (W)

Mobile 0422803434

Address 5 Jacob Pl, BUGLE RANGES 5251

Other Details

Expiry MC HCC

Referral To Dr Phillip Davis  
By Dr Vivian Morter  
On 28/06/2024 for 12 months

Alerts Requires DVA transport

Reason for chosen date

Cancellation Waiting Priority

Hide Notes ☐ Allow SMS ☒ Send Confirmation SMS ☐

Account Payers

Holloway, Knut	DVA	\$6,893.05
Medicare	P4	\$5,616.15
Department of Veterans Affairs	DVA	\$1,567.85
Gall	WC	\$804.23

Repeated booking ☐

Print Label Booking rules Print Letter Find Patient Print Slip Close Cancel Help

## Patient Details

From the Appointment book, right-click the patient and select **Patient Details**, and check that:

- There is only **one** entry in the **Mobile** field.
- Default Appointment SMS is **ticked**.
- There is only **one** entry in the **Email** field.
- There is a **Usual Dr** selected.
- **Medicare number** is recorded..
- Record the **patient or family NOK** as a **Payer** and **relevant usual Dr fee schedule** selected.
- Check there is a **Referral** and that the referral details are correct.
- **Alerts** for relevant information.
- Select the **Patient Verification** button to verify their Medicare / Health Fund status.
- Select the **eHealth** status tab and retrieve the IHI if required.

**Ramsay, Neha**

Acc Enquiry Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

**Patient Details**

Further Details  
Recalls  
Notepad  
**eHealth**  
Messages  
Payment Cards

**Personal**

Family Name: Ramsay  
Given Name: Neha Initial:   
Preferred Name: Former  
Title: Sex at Birth:   
Pronouns:   
Date of Birth: 29/06/1999 Age: 26  
Home: 25 James St  
Suburb: NEW FARM 4005  
Preferred Contact Method: Branch Default (not set)  
Mobile: 0400 999 111  
Do Not Send SMS ☐ Default Appointment SMS ☒  
Email: neha@gmail.com  
Usual Dr: Davis, Phillip  
Medicare: 9871 91991 9 1 Exp: 30/09/2027  
Veteran: Exp:   
Health Care: Exp:   
Safety Net:   
Pen. Stat: None PBS Co-payment ☐  
ATSI:   
Ethnicity: Set  
Block patient from online bookings ☐

**Practice**

File#: 255 Pull File ☒  
Hosp. UR No:   
Usual Branch: Branch 1 (255)  
First In: 26/11/2024 Last In: 27/08/2025  
Type: Status: Current

**Family**

\* Ramsay, Neha (255)  
Family Links

**Payers**

Ramsay, Neha P1 \$336.20  
Add Details Claims

**Fund**

**Referrals**

Brenda Reed 26/11/24 12 Mths  
Add Details

**Other Contacts**

NOK Name Relationship  
Mobile  
Emerg. Contact Name  
Mobile

**Next Appointment**

No upcoming appointments

**Alerts**

Alerts here

Delete Print **Patient Verification** Find Close Cancel

## Billing

Creating an invoice, check:

- **Payer's** field.
- Doctor field shows the correct doctor.
- Request/Referral has a valid referral entry.
- **Check the service date and Fee type** is correct.

Recording a receipt or prepayment, check:

- **Banklist** (payment screen) – select the correct **doctor's bank account**. It will not do this by default.