

Patient appointment and billing checklist

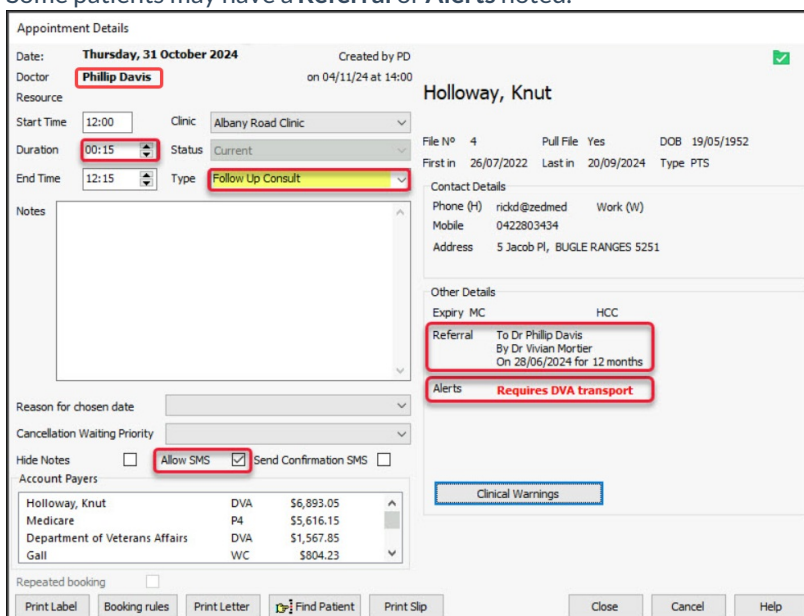
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What to check in the appointment and patient record when making a booking or attending a patient.

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 ✓
 Doctor: **Phillip Davis** on 04/11/24 at 14:00
 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

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

File No 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 Morlier
 On 28/06/2024 for 12 months
Alerts **Requires DVA transport**

Clinical Warnings

Buttons: 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
Clinical Warnings
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

Add Details Claims

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:

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

Recording a receipt or prepayment, check:

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