# Patient appointment and billing checklist

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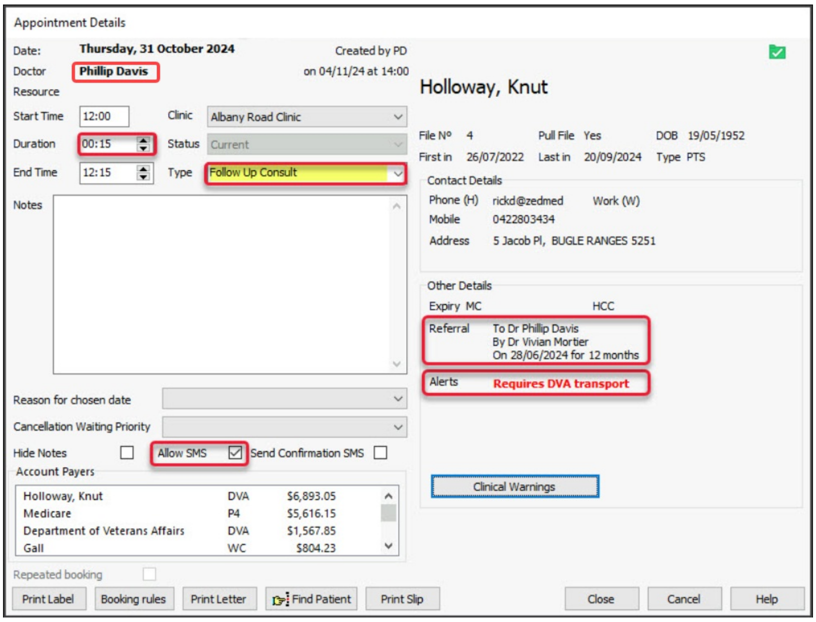
What to check in the appointment and patient record when making a booking or attending a patient.

### What to check in Appointment Details

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

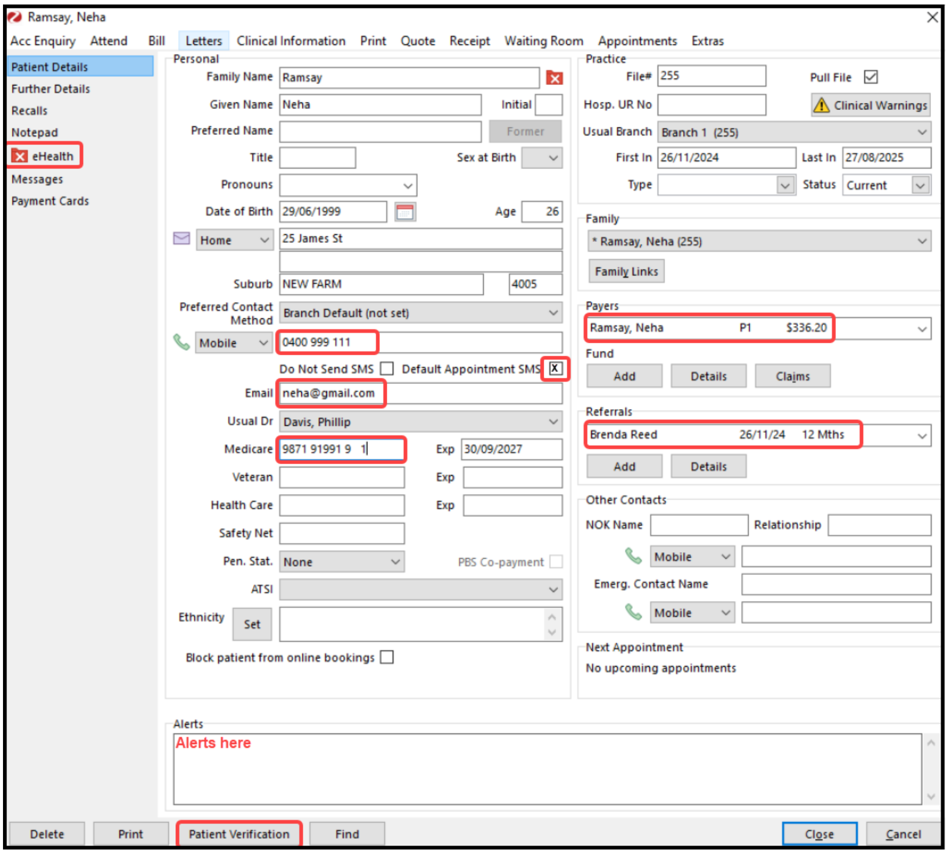
- The appointment **Duration** is correct for the appointment **Type and Doctor**.
- **Allow SMS** is ticked.
- Some patients may have a **Referral** or **Alerts** noted.




### 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 **eHeatlh** status tab and retrieve the IHI if required.




## 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.