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Audit4 Practice Management Handbook

Audit4 version 19+

2021

Background

Many tasks within Audit4 are externally driven {initiated by 3rd party} by the Patient or the Doctor. For example:

- Patient rings for Appointment
- Patient sees Doctor and comes to front desk to pay for consultation

These events will initiate tasks; this work is reactive. This document does not cover these reactive tasks. The primary focus of this Handbook are the tasks that are not externally driven and would usually be done or overseen by the Practice Manager. Much of this work needs to be completed on a regular basis.

The following tables is only a guide. It provides suggestions for how often certain Practice Management Tasks should be undertaken. Needs may vary greatly from practice to practice; part-time single practitioner practices will have different requirements to full-time practices that have a number of practitioners. This table can also serve as a checklist.

Audit4 Clinical	Notes	Suggested Frequency
Inbox Results, eCorrespondence and Media Matching	Check to see if new Inbox Items need matching so clinicians do not miss anything. Some practices may deem this a clinician task only. Prior to the consulting session is best.	**Daily**
Letters and Word Processing	If using WP Tasks, check for outstanding tasks. If sending electronically check the delivery of your outgoing messages for delivery failures. • If using HealthLink use the WP Outstanding Sent Items Report. • For systems other than HealthLink use the method they provide to check for delivery failures.	**Daily**

Appointments		
New Appointment Plan(s)	Provided you have reasonable certainty on the practitioners planned working hours, create the new plan for the coming year (or further if desired) to allow appointment searches and bookings into the distant future.	**6 months**
Next Year's Public Holidays	During the year, your Audit4 will be updated a couple of times by S4S Support. After an update, new Public Holidays for the year ahead may be available to load. S4S will announce this in the post-update email.	**6 months**
Appointment Day Check	Prior to each practice day, the Appointment Day Check can be used to ensure: • Patient Medicare, DVA card, and Health fund details are up to date and valid. • Referrals are valid. • See if there are new incoming replies to any SMS messages that were previously sent from the day check. By resolving these issues in advance, you can make the day will run smoother. For missing or expired referrals, one option is to send an SMS to the patient straight from the day check.	**Daily**
Appointment Reminder Task	If you send SMS appointment messages to your patients, the current SMS Reminder Tasks should be reviewed to track appointment confirmations, and also follow-up on those without mobiles or that fail to confirm.	**Daily**
Review Waiting List	The waiting list button on the Appointments ribbon displays the number of patients wanting an earlier appointment that could be rescheduled into an earlier available time slot. Patients should be contacted and rescheduled or the available slot rejected until the number on the ribbon hits zero.	**Daily**

Audit4 Billing		
Banking - Deposit Slips	Audit4 allows you to create **Deposit Slips** that make it much easier to reconcile the business bank account statements with the Audit4 revenue. For sites with multiple bank accounts, bank deposit slips will also help ensure that the correct amount ends up in the correct account.	**Daily Or Weekly**
Download Claims	Medicare, Claim Overview, Get All. These will download reports from Medicare and then Audit4 will automatically receipt Bulk Bills and DVA claims. Those rejected or those with some sort of error returning from Medicare will need appropriate follow-up depending on the error. Start of the day is best as this avoids querying for Bulk Bill reports that have only just been lodged that day.	**Daily**
Payment Reports	Reconcile your Bank Statements with Medicare Claims Payment reports Your bank account statements will include deposits from Medicare for Bulk Bills and DVA Claims. Medicare will have a number of these BBs and DVAs combined into single payments. When you download these reports, it will provide the detail of which BB or DVA is in which bank transfer.	**Weekly**
Eclipse Remittance Advices	Download Eclipse Remittance Advices (ERAs). Remittance Advices from Medicare Eclipse are required for Audit4 to receipt Inpatient Medical Claims (IMCs). You can do a maximum period of 30 days per request. If you submit IMCs regularly, you should download ERAs at least once per week. Ensure the download date ranges do not miss any days.	**Weekly & Before doing revenue reports for GST etc.**
Appointments with no Service Item and no Invoice	To find Appointments that were somehow not invoiced, use the **Audit and Search**, listed in the **Billing** Category, called **Appointments with no associated Service Items**. If you perform this weekly you can catch any issues early and you can simply use shortcuts such as 1w or 2w in the Start Date field to check the last 1 or 2 weeks. It is important to look at the calendar for each day shown in the report as well as the Patient Billing as sometimes the Service Item may have been created but not linked to the Appointment, a situation which is easily corrected.	**Weekly**

Un-invoiced Items	To find Service Items that have been created but not yet been invoiced. Actions on the ribbon in this report allow you to work through these to resolution. Note that when working through the list, you may find an un-invoiced Service Item that is duplicate of a properly invoiced one – this can happen if a Service Item is created but the invoice is not completed, then a new Service Item is created later and is completed. The duplicate can simply be deleted and it will disappear from the report.	**Weekly**
Debtors	Review the Debtors report and follow up on unpaid invoices it finds. Again, actions on this report's ribbon allow you to work through the list.	**Weekly**
Writing Off underpayments	Invoices to Medicare (e.g. BBs and DVAs etc.) are sometimes under paid. Often this is only a few cents. These will appear in the Debtors report and you can write off these amounts. Audit4 has a General Preference to allow Audit4 to automatically write-off Medicare underpayments – this is recommended to save you work and to ensure the debtors report is not overloaded with these so you can focus on the more important debtors. Talk to S4S Support if you want to enable this preference.	**Weekly** **Or** **Enable automatic**
Revenue Report	Downloading the revenue report for financial quarters will generally be necessary for GST reporting. Download to a CSV file (Comma Separated Values) to provide to your accountant so they can easy put this into Excel. It is best to complete the tasks above before this to ensure you are accurately reporting revenue.	**Quarterly**

Staff Exit Procedures		
Disable their Audit4 Login	S4S Support can disable their username for you. You should also talk to your IT Support about other logins.	**After last day**
Re-assign Tasks	Use the Audit & Search "Tasks - Owned by Disabled or Deleted User" to reassign ownership of incomplete tasks that the newly disabled user may still have.	**After last day**

Practitioner Exit Procedures		
Inform S4S Accounts	Inform S4S Accounts of the exit date for the practitioner that is leaving and if they are being replaced. Accounts can ensure Software Subscription fees are adjusted accordingly.	**ASAP**
Disable their Audit4 Login	S4S Support can disable their username for you if required. You should also talk to your IT Support about other logins they may have been using for Remote Access etc.	**After Last day or as negotiated**
Re-assign Tasks	Use the Audit & Search "Tasks - Owned by Disabled or Deleted User" to reassign ownership of incomplete tasks that the newly disabled user may still have. If their Audit4 username is not yet disabled, simply change the Task View to see and reassign their tasks.	**After last day**
Inform Referrers (Optional)	Use the Referral Audit to get a list of all Referring Drs that have referred patients to your exiting practitioner. You can copy the list to Excel then, via post or bulk email, you can advise them of the exiting Practitioner's termination date. Consider asking them to cease sending copies of Pathology/Radiology results to the exiting practitioner's provider number(s).	**Before or After last day**
Inform Pathology and Radiology Providers (Optional)	If you want to stop receiving any further results for the exiting practitioner's provider number, consider asking Pathology and Radiology providers to remove the provider number from your download accounts. Note that if patients are likely to switch to another practitioner within the practice, then you may opt to skip this step so that you continue receiving CC'd results.	**After Last day**
Check Future Appointments	Future Appointments may need to be deleted or the SMS Reminder task may need to be modified to exclude that Dr. S4S Support may need to assist.	**After Last Day**

Training can be provided by S4S Support for any of the Audit4 features mentioned above. Call 1300 133 308 to arrange your training session.