



Strategic planning for the holiday season

Acknowledgement of Country

In the spirit of reconciliation Cubiko acknowledges the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

Gaagal by Miimi and Jiinda



House Keeping

- Change the chat from 'Hosts and panelists' to 'Everyone' so that we can all join in on the conversation.
- If you have a question, please add it to the Q&A area at the bottom of your screen. This helps ensure that we can see and answer your questions.
- This session will be recorded. A copy of the recording will be sent out later today, along with any links or resources shared in today's session.

Overview of today's session

End of year strategies for your practice

- EOY checklist to guide your practice through important end-of-year preparations.
- Complete last-minute CPD hours before 1 January and how Cubiko can help support earning up to 32.5 CPD hours
- Explore ways to set up quality improvement (QI) activities and create CPD plans for 2025.
- Using practice data to review debtors and unbilled Medicare appointments to action before year end to start 2025 with a clean slate.
- Learn how to identify patients due for care plans, reviews, and 10997 services, ensuring necessary actions are completed before the calendar year ends.

EOY Checklist

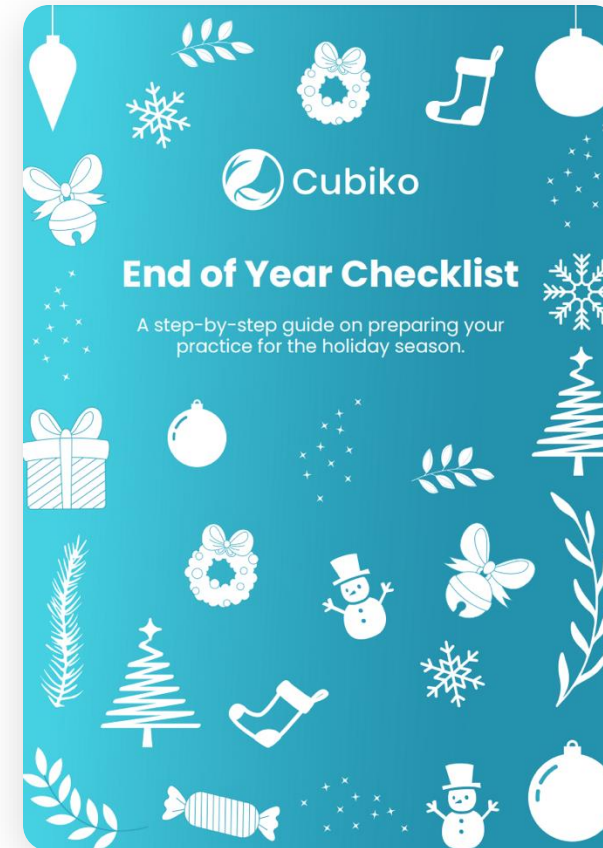


EOY Checklist

End of year strategies for your practice

One resource for ticking off your EOY admin

- ✓ Notify patients of your holiday closure
- ✓ Confirming your diaries
- ✓ Manage leave approvals
- ✓ Taking care of your team!



EOY Checklist

End of year strategies for your practice

Notify patients of your holiday closure

- The checklist includes recommended wording for informing patients of closure dates
- A complete list of ways to inform patients including posters, website updates, emails and more

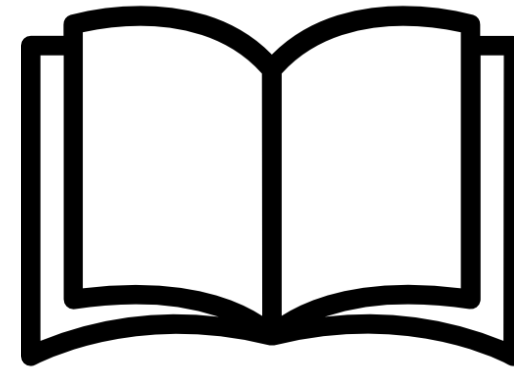


EOY Checklist

End of year strategies for your practice

Wrapping up your admin

- Direct patients to other health facilities during closure
- Manage your team's leave
- End of year bonuses, Christmas party, tax considerations



FREE DOWNLOAD

End of Year Checklist & Christmas Closure Posters



Have your GPs completed CPD for the year?



Have your GPs completed CPD for the year?

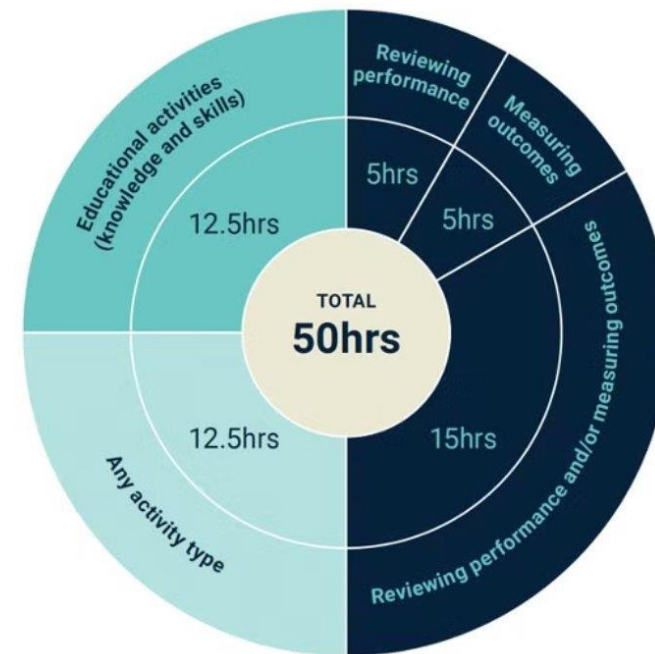
Last minute activities to make CPD a breeze

Three categories of CPD to complete

Educational activities

Reviewing performance

Measuring outcomes



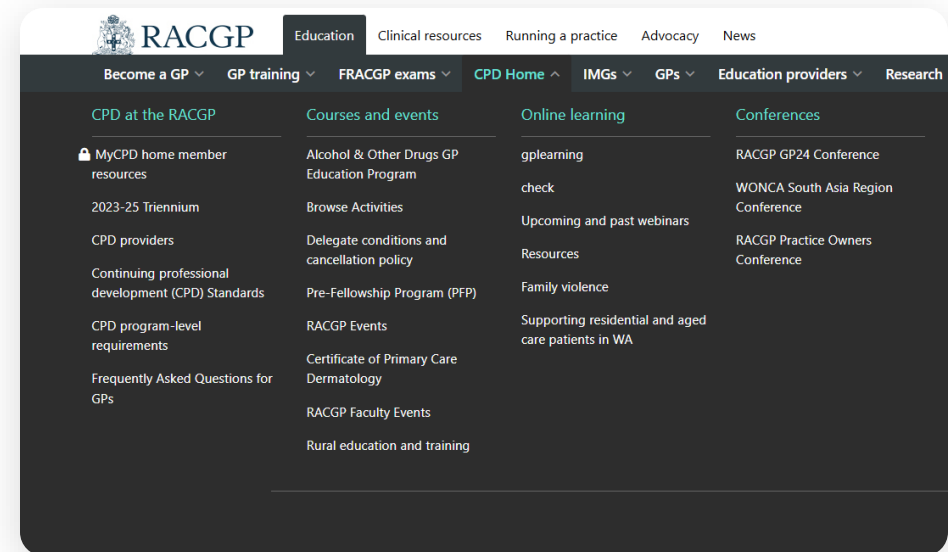
Have your GPs completed CPD for the year?

Educational activities

RACGP.org.au

As always, the RACGP is your go-to place for all things CPD

There is a huge variety of content as well as links to 3rd party CPD education providers to assist your GPs in completing their hours

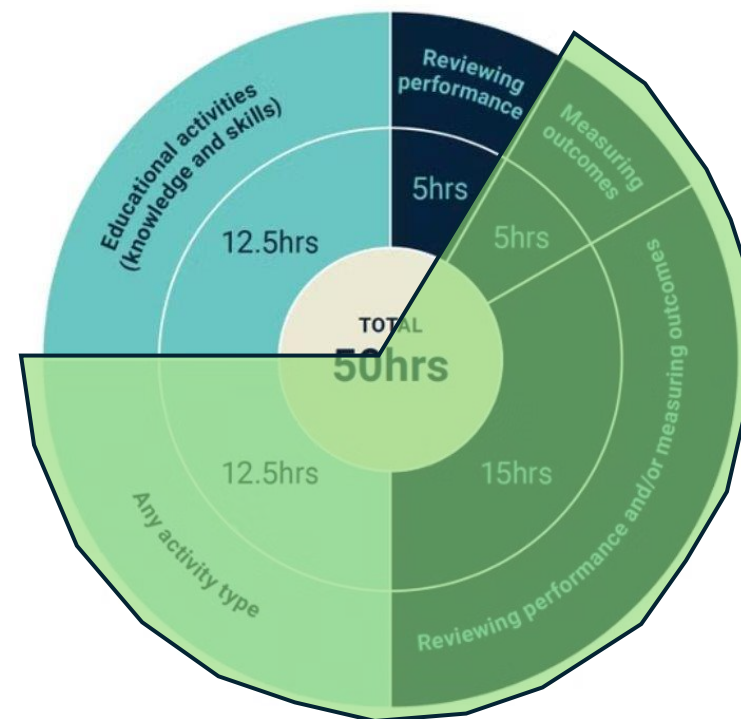


Have your GPs completed CPD for the year?

Measuring outcomes

Measuring outcomes can contribute up to 32.5/50 hours of total CPD.

For many GPs it's the most difficult category of learning activities to complete



Have your GPs completed CPD for the year?

Measuring outcomes

Within Cubiko, there are 8 CPD activities pre-approved by the RACGP, helping GPs easily identify the actions that will have the biggest impact on your patients.

The activities can be a simple way to complete outstanding CPD requirements before the end of 2024

All CPD Activities



Cubiko data analysis of patients with diabetes who have not been vaccinated against influenza in the last 15 months

736 potential patients

Earn up to 5 CPD hours

[View activity details](#)

Cubiko data analysis of patients who are eligible for a Chronic Disease Management (CDM) plan review

1,327 potential patients

Earn up to 10 CPD hours

[View activity details](#)

Cubiko data analysis of patients who are eligible for an Item 699 Heart Health Check

3,910 potential patients

Earn up to 10 CPD hours

[View activity details](#)

Cubiko data analysis of patients who are aged 15 years and over and whose smoking status has not been recorded

1,687 potential patients

Earn up to 5 CPD hours

[View activity details](#)

Cubiko data analysis of patients with diabetes who have not had a Blood pressure reading in the past 6 months

505 potential patients

Earn up to 5 CPD hours

[View activity details](#)

Cubiko data analysis of patients who are aged 75 years and older and eligible for a Health Assessment

135 potential patients

Earn up to 10 CPD hours

[View activity details](#)

Cubiko data analysis of patients whose ethnicity has not been recorded

780 potential patients

Earn up to 5 CPD hours


[View activity details](#)

Cubiko data analysis of patients who are aged 15 years and over and whose alcohol status has not been recorded

506 potential patients

Earn up to 5 CPD hours

[View activity details](#)



Have your GPs completed CPD for the year?

Measuring outcomes

These activities are broken down into 5 simple steps, enabling GPs to easily understand objectives, complete reflection and see exactly which patients they need to see to improve patient outcomes.

Step 1 - Overview and learning objectives

Step 2 - Analyse current data and generate an action plan

Step 3 - Completing the action plan

Use this step to review your current data, then set up your CPD activity action plan by selecting the date range and size of activity you want to undertake. Lastly, record your goals for completing this activity.

Key Insights

You currently have **976** active patients diagnosed with diabetes. Of these patients, **736** are potentially eligible for a flu vaccination, and **110** are scheduled for appointments within the next 7 days offering an immediate opportunity to take action.

Review data definitions used in this insight [here](#).

Select the dates you want to run this activity across

Select the date range you want to run this activity across. You can come back at any time to adjust this date.

16 Oct 2024 → 31 Oct 2024

Select your activity size and potential CPD hours

Choose from three activity size options based on a small, medium or large opportunity to supercharge your patient care and earn CPD hours.

Large 20 actions = 5 hours (Activity ID: 953280)

How are you going to achieve your goal?

Summarise how you will complete this activity.

B

I

U

S

≡

≡

🔗


e.g. I intend to follow clinical guidelines to ensure my patients...

Minimum 100 characters required to complete this section. (0/100)

Discard changes

Save changes

☐ Tick this checkbox to confirm you have completed Step 2 and are ready to move on to Step 3.

 Cubiko

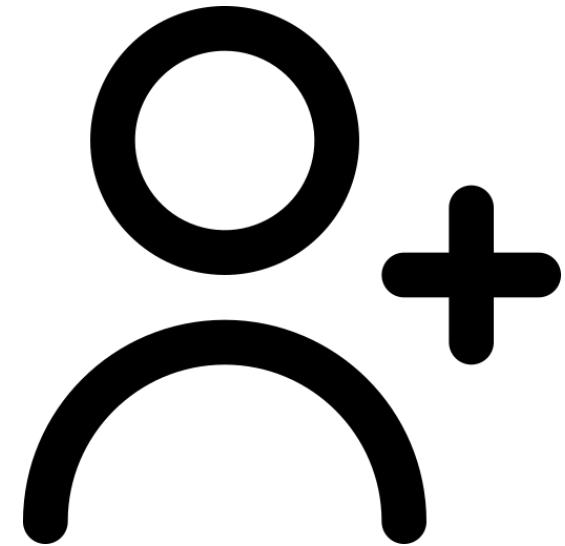
Create a joint QI & CPD plan for 2025



Create a joint QI & CPD plan for 2025

Consider your focus areas and discuss them ahead of time

1. Gather input from GPs, nurses and staff
2. Set objectives and goals
3. Schedule monthly workshops well ahead of time
4. Complete your activities throughout 2025
5. Organise an end of year review and start the cycle again



Create a joint QI & CPD plan for 2025

Consider your focus areas and discuss them ahead of time

There are hundreds of metrics that you can use to create QI activities!

Get ideas from your practice team about what will help your practice improve and provide better care to your patients next year.

- Recalls / Reminders
- Medicare / DVA exceptions (rejections)
- Held accounts
- Outstanding debt
- Health Assessments
- Chronic Disease Management
- Patient wait time
- Time till third next available appointment

Create a joint QI & CPD plan for 2025

Consider your focus areas and discuss them ahead of time

Consider a yearly collaborative cycle of QI and CPD

Proposed changes in the works for the RACGP Standards 6th edition

CQI.1► A Our practice team undertakes continuous quality improvement activities.

You must:

- train team member/s who have the primary responsibility for quality improvement activities in your practice about their role
- have a system to identify quality improvement activities
- include at least one **clinical improvement** activity every 12 months
- keep a record of feedback from your practice team about quality improvement systems
- document quality improvements made to your practice or practice systems in response to feedback, complaints, or audits.

Using data to review potentially missed billings



Using data to review potentially missed billings

What areas can we explore to find missed billings?

Administrative gaps

Outstanding debt

Uncompleted patient appointments

Unbilled appointments

Billings on hold

Historical item usage

Item 23 for extended consults

Missed 10997's

Using data to review potentially missed billings

Outstanding debt

- Clearing out debt is integral to a health practice bottom line
- Your PMS of choice as well as reporting systems have a number of reports to help you identify account that need following up before Christmas closure

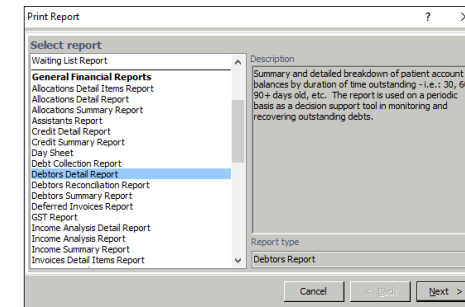
Debtor Aging Report (grouped by account type) - aged by Invoice Date Cubiko Demo Practice

Invoice No.	Inv. date	Patient Name	Current	31-60 Days	61-90 Days	91+ Days	Total GST	Total Owng
Srv Date	Srv Created	Item	Fee Owng (incl GST)	Fee Owng (incl GST)	Fee Owng (incl GST)	Fee Owng (incl GST)		(incl GST)
<input checked="" type="checkbox"/> Main surgery			110.00	0.00	0.00	0.00	0.00	110.00
<input checked="" type="checkbox"/> Private			110.00	0.00	0.00	0.00	0.00	110.00
<input checked="" type="checkbox"/> Practice - Cubiko Demo Practice			110.00	0.00	0.00	0.00	0.00	110.00
<input checked="" type="checkbox"/> TEST, Test			110.00	0.00	0.00	0.00	0.00	110.00
<input checked="" type="checkbox"/> 5 08/11/2022 TEST, Test			110.00	0.00	0.00	0.00	0.00	110.00
08/11/2022 08/11/2022 Custom item created by L.R. service details field			110.00	0.00	0.00	0.00	0.00	110.00
Total Outstanding Amount as at 08/12/2022			110.00	0.00	0.00	0.00	0.00	110.00

Report Parameters: Report Version: 1.00 SP Version: 3
 As at Date: 08/12/2022
 Location: HSA - emergency
 Procedure: All
 Account: Type: ALL

Note: the Aging on this report uses Invoice created date rather than Service created date - therefore adjustments will have same aging as the original invoice.

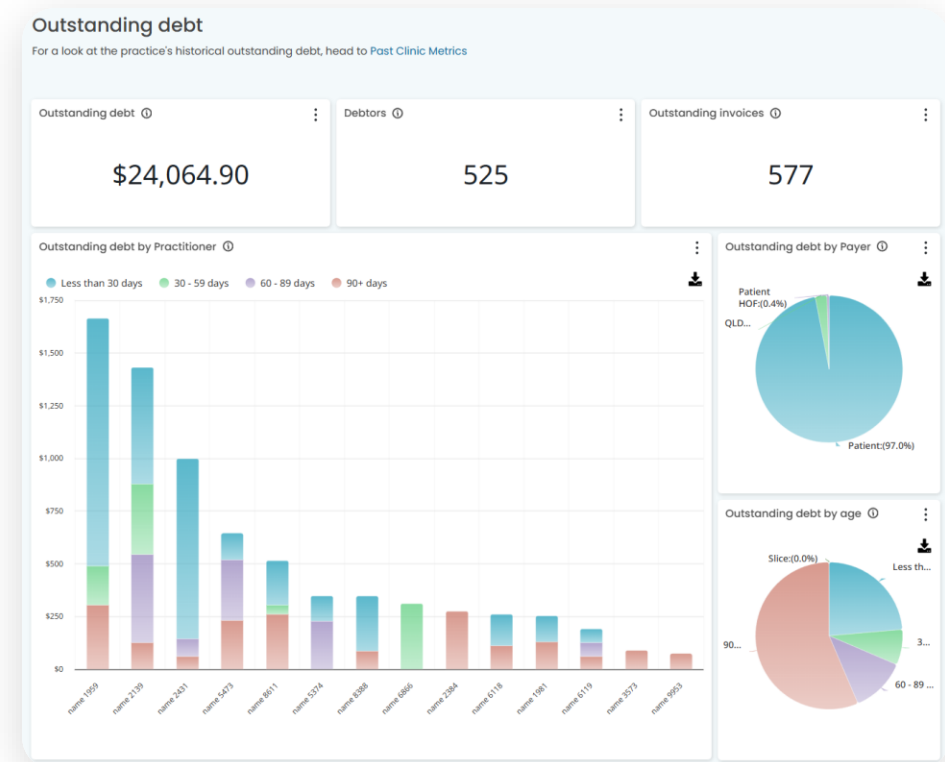
08/12/22 04:58:44 AM
 Page: 1/1



Using data to review potentially missed billings

Outstanding debt

- Clearing out debt is integral to a health practice bottom line
- Your PMS of choice as well as reporting systems have a number of reports to help you identify accounts that need following up before Christmas closure



Using data to review potentially missed billings

Uncompleted appointments

- Another area where billings can become trapped
- Look for historical appointments with a status of booked, at billing, with Dr or similar within your PMS



All uncompleted appointments ⓘ

	INTERNAL...	Record no.	Appointment Date	Patient	Appt Status	Appointment Type	Duration (mins)
1	8118	32159	21/10/2024	surname 9929, firstname 1473 (19yrs - city 1117)	Booked	description 8688	20
2	6773	30135	09/10/2024	surname 9893, firstname 6621 (36yrs - city 3844)	Booked	description 7432	20
3	11567	40852	10/10/2024	surname 9667, firstname 9984 (33yrs - city 5684)	At Billing	description 3639	10
4	3756	15269	10/10/2024	surname 9476, firstname 4586 (50yrs - city 5684)	Booked	description 7432	20
5	2755	11544	15/10/2024	surname 9356, firstname 2867 (60yrs - city 5684)	With Dr	description 3685	20
6	1460	1742	23/10/2024	surname 9292, firstname 2979 (76yrs - city 5684)	Booked	description 8184	20
7	39419		23/10/2024	surname 9161, firstname 2867 (59yrs - city 1457)	Booked	description 1525	60
8	3388	24170	10/10/2024	surname 9132, firstname 7649 (11yrs - city 5684)	Booked	description 7432	20
9	39398		18/10/2024	surname 8816, firstname 7649 (53yrs - city 7482)	Booked	description 1525	60
10	11931	29249	18/10/2024	surname 8355, firstname 8623 (83yrs - city 2152)	Booked	description 3776	10
11	1304	4665	09/10/2024	surname 8355, firstname 5966 (74yrs - city 7259)	At Billing	description 2225	20
12	12510	42832	01/10/2024	surname 8136, firstname 7649 (58yrs - city 8446)	Booked	description 6867	10
13	12499	42773	18/10/2024	surname 7974, firstname 6621 (23yrs - city 4586)	Booked	description 8412	30

Using data to review potentially missed billings

Unbilled appointments

- More difficult to find as you're looking for the absence of invoices related to bookings
- Generate a report on appointments and look for an invoice count of 0

Appointments (grouped by User)							Bp Training Clinic 1				
Appointment	Appointment	Appointment	Appointment	Patient Name	Arrival	Consultation	Appointment count		Invoice	Service	Total Fee
Start Time	Length	Type	Status		Time	Start Time	Patient	Non-Patient	Count	Count	(\$incl GST)
Inv No	Inv Date	Billed to									
MBS Item	Description										
Bundaberg Clinic							137	5	113	143	8,808.35
Dr Ivor Cure							48	1	36	47	3,340.75
27/08/2020							11	0	11	17	1,230.10
H	9:00	0:15 Standard appt	Booked	Rhonda Ahern			1	0	1	2	46.30
H	9:15	0:15 Standard appt	Booked	Farrah Eason			1	0	1	1	37.05
H	9:30	0:15 Standard appt	Booked	Felix Adams			1	0	1	3	271.10
H	9:45	0:30 Long appt.	Booked	Jim Eason			1	0	1	1	95.00
H	10:30	0:15 Standard appt	Booked	Chaminda Hines			1	0	1	2	149.55
H	10:45	0:30 Long appt.	Booked	Mandy Moore			1	0	1	1	66.00
H	11:15	0:30 Long appt.	Booked	Bobby Leonard			1	0	1	2	80.95



Using data to review potentially missed billings

Unbilled appointments

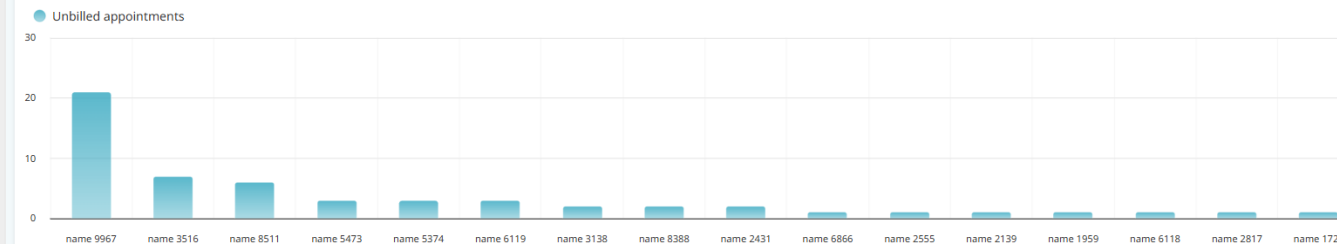
- More difficult to find as you're looking for the absence of invoices related to bookings

Unbilled appointments

A time limit of two years currently applies to the lodgement of claims with Medicare under the direct billing (assignment of benefit) arrangements. This means that currently, Medicare benefits are not payable for any service where the service was rendered more than two years earlier than the date the claim was lodged with Medicare. Click [here](#) and [here](#) to find further information about it.

It has recently been announced that this claiming period will be reduced to 12 months from November 2025. Read more about it [here](#).

Unbilled appointments by Practitioner ①



Unbilled appointments ①

56

Using data to review potentially missed billings

Billings on hold

- These are found in Bp and are optionally used by many practices
- If you aren't familiar with the option, it's worth checking that it hasn't been accidentally used

The screenshot displays a software interface for reviewing billings on hold. At the top, a summary card titled 'Billings on hold ⓘ' shows a large number '16' and the text '6 days old on average'. Below this is a table titled 'List of billings on hold ⓘ' with columns for Invoice date, Age (days), Invoice number, Patient, Practitioner, Missed item, and Total fee. The table contains 17 rows of data.

	Invoice da...	Age (days)	Invoice ...	Patient	Practitioner	Missed item	Total fee
1							
2	20/09/2024	54	477361	surname 8355, firstname 6621 (0yrs -	firstname 5954	Item 23	\$85.00
3	28/10/2024	16	481111	surname 2495, firstname 4668 (0yrs -	firstname 5954	Item 23	\$42.85
4	28/10/2024	16	481106	surname 5754, firstname 6621 (60yrs -	firstname 9922	Item 10990, Item 10990, Item 23, Item 30071, Item	\$154.40
5	04/11/2024	9	481952	surname 2556, firstname 5888 (60yrs -	firstname 3493	Item 30071, Item 31367	\$289.00
6	06/11/2024	7	482304	surname 2229, firstname 7649 (0yrs -	firstname 7649	Item 36	\$82.90
7	06/11/2024	7	482406	surname 7296, firstname 3785 (29yrs -	firstname 4285	Item 36	\$188.00
8	08/11/2024	5	482583	surname 1547, firstname 4586 (0yrs -	firstname 5954	Item 23	\$42.85
9	08/11/2024	5	482656	surname 8489, firstname 7649 (74yrs -	firstname 7242	Item 10990, Item 10990, Item 721, Item 723	\$308.90
10	11/11/2024	2	482750	surname 2229, firstname 7649 (0yrs -	firstname 5954	Item 23	\$42.85
11	11/11/2024	2	482738	surname 4874, firstname 7649 (56yrs -	firstname 1421	Item 10990, Item 10990, Item 721, Item 723	\$308.90
12	11/11/2024	2	482787	surname 5193, firstname 9984 (70yrs -	firstname 5954	Item 10990, Item 10990, Item 723, Item 732	\$226.65
13	11/11/2024	2	482858	surname 5718, firstname 7535 (61yrs -	firstname 1421	Item 10990, Item 10990, Item 721, Item 723	\$308.90
14	11/11/2024	2	482735	surname 6416, firstname 7535 (35yrs -	firstname 5954	Item 10990, Item 10990, Item 721, Item 723	\$308.90
15	11/11/2024	2	482793	surname 8848, firstname 9765 (73yrs -	firstname 1421	Item 10990, Item 10990, Item 723, Item 732	\$226.65
16	12/11/2024	1	483030	surname 5879, firstname 5966 (48yrs -	firstname 7242	Item 36	\$188.00
17	12/11/2024	1	482973	surname 7111, firstname 2867 (78yrs -	firstname 3859	Item 10990, Item 10990, Item 10990, Item 10997,	\$367.50

Identifying missed and outstanding services for the year



Identifying outstanding services

How do we find our missed billings, 10997's and other items?

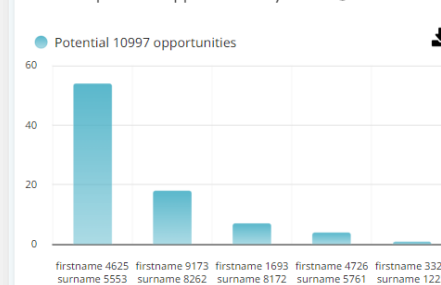
- Searching for patients who have been billed a CDM item and have then seen the nurse, but no 10997 has been billed
- Conduct chart audits to assess whether billing the 10997 is appropriate

Historical 10997 opportunities

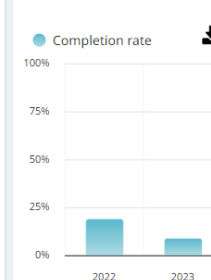
Eligibility for item 10997 is based on historical billings of items 721, 723, 731, 732 and also their Telehealth, Telephone and non-VR equivalents. Patients who received five item 10997s in a calendar year are not considered eligible for further billing opportunities of item 10997s in that calendar year. Always consult the Practitioners about billing decisions and ensure the relevant service or appointment meets MBS/DVA guidelines.

This metric can assist in finding appointments that were booked with your nurse team where a 10997 may have been performed but not billed. Please ensure to review these appointments to check if the service was performed, documented, and therefore eligible for billing as per MBS/DVA guidelines for item 10997. Not all appointments listed in this metric will be able to be billed an item 10997. Visit [MBS Online](#) for more information

Historical potential opportunities by Nurse



10997 completion rate



Historical potential 10997 opportunities

84

Identifying outstanding services

How do we find our missed billings, 10997's and other items?

- Standard consult item usage!
- For each practitioner, look through appointments where an item 23 was billed with a longer than expected appointment duration.
- Was it clinically suitable to have billed an item 36 or another item for the extended consult?

Item 23: appointment length vs item billed ⓘ				
	Date	Invoice ID	Actual appt durati...	Booked appt dura...
1	09/10/2024	479140	28	10
2	02/10/2024	478544	28	10
3	29/10/2024	481250	38	20
4	25/10/2024	480865	30	20

Finding care opportunities

How do we find our remaining or future 10997's and other CDM/HA items?

- Look for patients with a historical billing
- Are they eligible now?
- Are there any other outstanding health assessments or CDM services that warrant reaching out to book before EOY

▼ Patients eligible for Health Assessments	
75+ health assessment ⓘ	Item 715 ⓘ
1,070	329
Item 699 ⓘ	
5,603	

Finding care opportunities

How do we find our remaining or future 10997's and other CDM/HA items?

Item optimisation

All item optimisation metrics will include the new COVID-19 Telehealth and Telephone item numbers. See the MBS for more details.

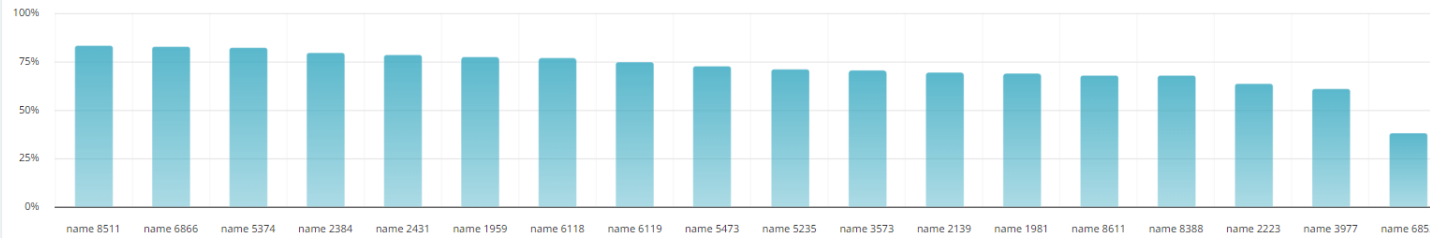
Always provide these lists to Practitioners to make billing decisions.

Visit [Possible service opportunities today](#) to find an actionable list of upcoming patient appointments which Cubiko have identified as possibly eligible for services.

Fulfilment of CDM opportunity by Doctor ⓘ

Group by: Last seen Doctor ▾

● % fulfilment of CDM opportunity



Patients eligible for GPMPs, TCAs, MCPs and reviews

Potential new CDM patients ⓘ

2,058

Item 721 ⓘ

1,808

Item 723 ⓘ

1,689

Item 732 ⓘ

1,413



Any questions?