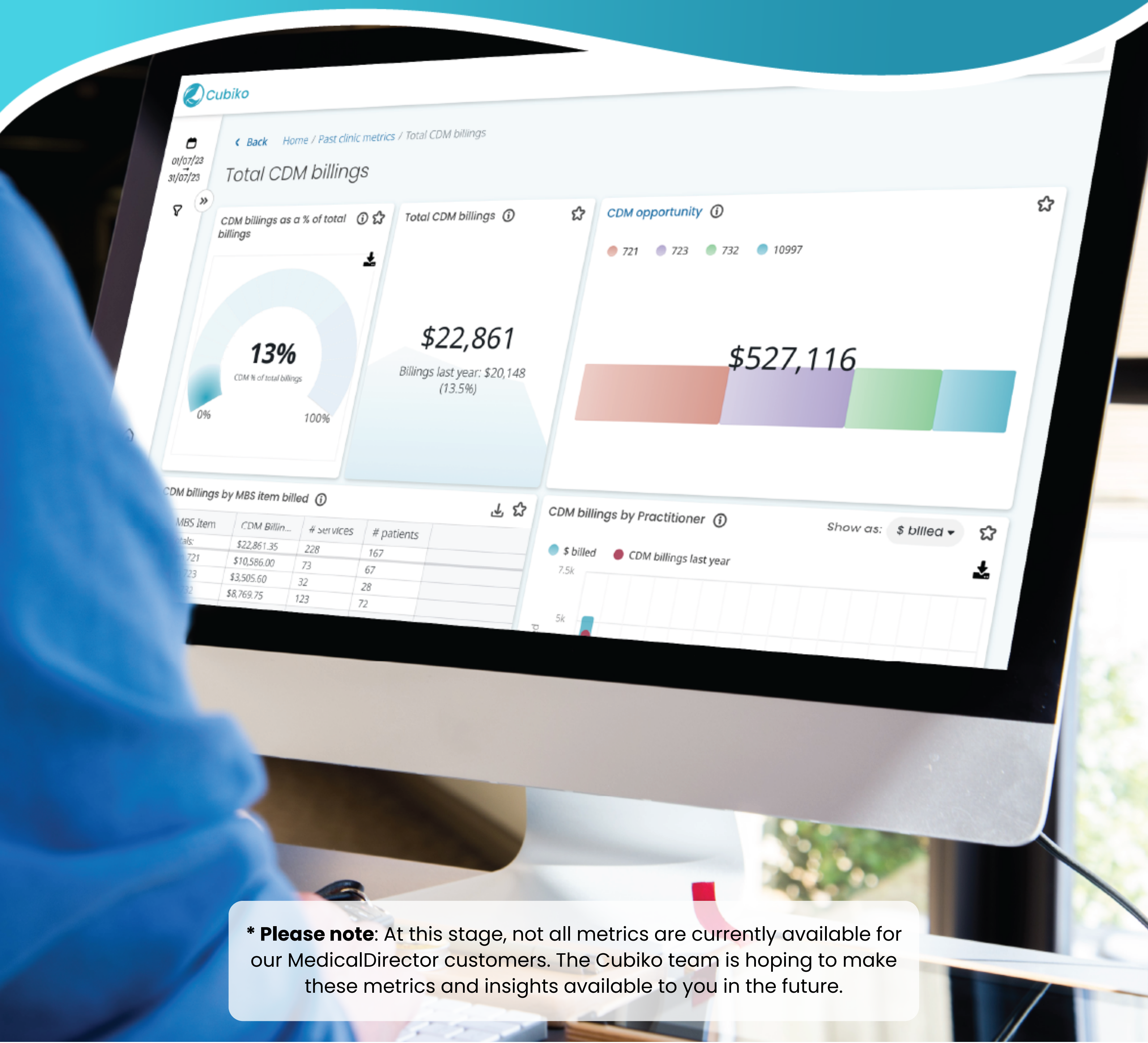
Cubiko

Workflows for your practice



*** Please note**: At this stage, not all metrics are currently available for our MedicalDirector customers. The Cubiko team is hoping to make these metrics and insights available to you in the future.

This cheat sheet contains our list of suggested workflows that you can incorporate into your daily, weekly and monthly workflows.

Tips and Tricks

Below are some of our Tips and Tricks to help you get the most out of your Cubiko data.

Complete and keep on track with your Cubiko Settings To help ensure that you get the most value out of your Cubiko data there are some **essential Settings** that you must complete before you can roll Cubiko out to your practice. These settings include:

- Users
- Appointments
- Send to Cubiko

Located within Cubiko Settings we also have some **optional Advanced Settings** that you can complete. Completing these Advanced Settings can help provide you with more insights into how your practice is performing, however they are not essential for the initial setup of Cubiko. You can learn more about these Advanced Settings via the links below:

- Open Hours
- Practice Budget
- Targets
- Rooms

Getting engaged with data

Engaging with data is key to ensuring that you and your team is on track to achieving your practice goals. You can ask your Cubiko Admin user to provide you with access to Cubiko to help you gain better insight into what's happening within certain areas of the practice. They can do this by deciding which Cubiko metrics you and other members in your team can access through Cubiko's Viewer Settings.

We have written a detailed Knowledge Base article which outlines all of the cabinets we have within Cubiko and what permissions we suggest are granted to different roles within the Practice (reception, nurse, doctor etc).

Resources

Cubiko has a wide range of resources that you can use in your practice daily. These resources are available for you to view and download on our website.

We've worked closely with our Customer Success Team to create some great workflows to help you and your team get more out of Cubiko. We've broken these workflows down by Role within the practice and outlined the key metrics each member of your team should be looking through on a daily, weekly, and monthly basis.

You can view and download these workflows for your team below:

- Cubiko for Practice managers, Practice Owner and management team workflow
- Cubiko for Reception team workflow
- Cubiko for Nurses team workflow

Support

We want to help you become a data-empowered practice by getting the most value out of Cubiko and your practice data. To help support you and your team our amazing Customer Success Team run regular webinars for each of the roles within a Practice (Reception, Nurses, and Practitioners). In these sessions they provide insight into how they can use and incorporate Cubiko into their daily workflow. Check out our Knowledge Base article for more information on these webinars and future webinar dates.

Daily Workflows for your Practice

Key metrics to look through on a daily basis.

Unconfirmed appointments today

Found in Today's clinic metrics | Reception team

Use the 'Unconfirmed appointments today' patient list to see the details of booked appointments for today that have not been marked as confirmed in your appointment book. You can sort the list by the highest **DNA rate** to help you confirm patient appointments in priority order.

Possible service opportunities today: Practitioner opportunities

Found in Today's clinic metrics | Reception team

Use the **Patients with opportunities** table to see patients with appointments for the current day and what items they may be eligible to book for based on your practice's billing history for those patients. Filter this list for each Practitioner and download and print a copy for each Practitioner at the start of their day.

Possible service opportunities today: Nurse opportunities

Found in Today's clinic metrics | Nurse team

Use the **Nurse items** tab for items 10997 and 10987 to see a list of patients with appointments for the current day who may be eligible to have an item 10997 or item 10987 service performed and billed that day, based on your practice's billing history for those patients.

Outstanding rejections *

Found in Today's clinic metrics | Reception team and Practice Manager

Review this metric to see a list that shows outstanding Medicare and DVA rejections that require follow-up.

Recalls *

Found in Today's clinic metrics | Reception team and Practice Manager

Review the list of all recalls, by age, that have not been marked as contacted to ensure they are being actioned in your practice.

Recall appointments to rebook *
Found in Today's clinic metrics | Reception team and Nurse team

This metric can assist in improving your patient care by ensuring that patients who require an appointment for a recall are not missed. This metric shows patients who did not attend the appointment type 'recall', which is used in your PMS. They also do not have a subsequent appointment booked or completed in your diary.

Overdue reminders *
Found in Today's clinic metrics | Reception team

This metric can assist with your patient's active participation in proactive healthcare. Our overdue reminders metric links to your PMS to help where a Practitioner has identified that a patient should be reminded about an important health issue that relates to their care. If a reminder is overdue, it means it is still to be actioned.

Appointments that may not be eligible for Medicare-subsidised telehealth services
Found in Appointment optimisation | Reception team

Review the **List of appointments that may not be eligible for Medicare-subsidised telehealth services** to see a list of patient appointments that may not be eligible for Medicare-subsidised telehealth services. Eligibility is based on whether the patient has had a face-to-face service at the practice in the past 12 months.

Ensure you tick the box **Telehealth appointments only** to refine your patient appointment list.

Uncompleted patient appointments *
Found in Billing optimisation | Reception Manager or Practice Manager

Use this list to see details of patient appointments that are still at the status of 'booked', 'waiting', 'with doctor' or 'at billing' in your appointment book, that need to be checked to ensure notes have been written by the Practitioner, billing has been done and then mark the appointment as completed in the appointment book.

Unbilled appointments *

Found in Billing optimisation | Reception Manager or Practice Manager

Use this list to review the number of appointments that do not have a billing with the same service date as the appointment, to ensure you do not have any missed billings.

QuickCheck *

Use this metric daily to quickly & securely verify patient item eligibility. Results for QuickCheck searches are valid for 24 hours and appear within our **QuickCheck › Verified eligibility** tab for anyone with access to the QuickCheck cabinet to view. Results are also displayed in the individual doctor's My Cubiko dashboard.

Please note that Cubiko QuickCheck is not included in the standard Cubiko Subscription; for more information on how to get started, please search for **Getting started with QuickCheck** on our Knowledge Base.

Weekly Workflows for your Practice

Key metrics to look through on a weekly basis.

Billings vs Target (Total billings)

Found in Summary of billings at the Practice | Practice Manager

Review your previous week's practice billings (inclusive of GST, and based on service date). You can compare the selected time frame with the same time the previous year, as well as a breakdown by Practitioner and by item number billed.

Total CDM Billings

Found in Summary of billings at the Practice | Practice Manager

Review your previous week's chronic disease management (CDM) billings (inclusive of GST, and based on service date) and how they compare to the same time last year. View your CDM billings by individual Practitioner to see which Practitioner is maximising their use of CDM item numbers in the practice.

Bulk Billing rate

Found in Summary of billings at the Practice | Practice Manager

Review your previous week's bulk billing by total amount billed rate. This is especially important if you are a mixed billing or private billing practice. The figure represents the proportion of total billings that have been bulk billed for item numbers that are eligible to be billed to Medicare and DVA.

Did Not Attend (DNA) Rate

Found in Practice operations summary | Practice Manager

DNA rates can have an impact on your practice consulting utilisation rate and the lost income can add up to decrease your overall revenue. Understanding what the rate is, will help you to drive new procedures to assist in lowering this rate.

New patients

Found in Practice operations summary | Practice Manager

Tracking your new patients has always typically been a very manual task. Now, you can easily check how many new patients you have had over a given period by reviewing the data in this metric. Gain insight into which Practitioners see the highest number of new patients, and data about how many new patients book online or through reception. Great for tracking if your marketing strategies to attract new patients are effective.

Item eligibility lists for recalls

Found in Item Optimisation | Nurse team

Use the metrics in the **Item optimisation** cabinet to focus on a different item number each week and see a list of patients who may be potentially eligible based on your practice's billing history. Use these metrics to increase patient uptake in booking Health Assessments and Chronic Disease Management item numbers.

COVID-19 Booster vax *

Found in Vaccination Support: COVID-19 vaccine | Nurse team

Find these metrics under the Patient eligibility tab.

Review the list of patients who may be eligible to receive a COVID-19 booster vax, and do not have an appointment booked. The use of these metrics is dependent on setting up COVID-19 appointment types in Cubiko Settings.

Patients eligible for NIP flu vax *

Found in Vaccination Support: Flu Vaccine | Nurse team

If you need to increase attendance in your flu vaccine clinics, this table provides a list of patients who are eligible to receive the Government-funded flu vaccine, as per the National Immunisation Program guidelines. Check 'Exclude Covax appts' or 'Exclude flu vax appts' filters to remove those patients whose next appointment is either for a COVID-19 vaccination or Flu vaccination.

Future utilisation forecast

Found in Future clinic metrics | Practice Manager

Review your graph showing your current consulting utilisation figures for the next 7 days against the forecasted average consulting utilisation based on the last 90 days. If current utilisation is below the utilisation based on the 90-day trend, it suggests that the clinic is likely to be less busy than expected on that day. Conversely, if the current utilisation is above utilisation based on the 90-day trend, it suggests that the clinic is currently tracking to be busier than expected on that day.

Historical 10997 opportunities

Found in Billing optimisation | Reception Manager / Practice Manager

Use this metric to see a list of nurse appointments that were with patients who were potentially eligible for an item 10997 but no item 10997 was billed with the same service date. If you use a specific appointment type for your nurse 10997 appointments, you can filter the list down by appointment type to check if the service was performed and the billing was completed.

Historical MT83-MT89 opportunities

Found in Billing optimisation | Reception Manager / Practice Manager

Use this metric to see a list of patients that may be eligible to have an item MT83 - MT89 billed. Eligibility is based on invoices that were billed to DVA and include telehealth or telephone services but do not already have a bulk-billing incentive already attached. This list will only include invoices that have a service date since March 13, 2020.

Historical 93666 opportunities *

Found in Billing optimisation | Reception Manager / Practice Manager

This metric can be used to look back and see missed potential 93666 incentive opportunities.

*Please note that this item was discontinued on 1st February 2023. This item can be billed retrospectively. Make sure to review the date of service and ensure you are billing the correct date. Service dates greater than 2 years ago will need to be claimed manually.

Billings on hold *

Found in Billing optimisation | Reception Manager / Practice Manager

Review your list of billings on hold to ensure billings are finalised in a timely manner and held accounts are followed up regularly.

Rebooking rate

Found in Billing optimisation | Reception / Reception Manager

Use this metric to see which patients who had an appointment in the date range selected have made a subsequent booking within the next 36 months.

This is great for tracking those appointments that you want patients to rebook for on the way out such as:

- Annual skin checks
- GPMP and TCA review (pick your frequency)
- Health Assessments (over 75 and Aboriginal and Torres Strait Islander)
- Custom appointment types

The Appointments with no rebookings show those completed patient appointments that currently do not have another appointment booked in the following 36 months.

The Rebooked appointments not of selected type show those patient appointments that have other appointments booked in the next 36 months following the original appointment that are not of a booked appointment type selected in the filters.

Use the lists to have reception call those patients who didn't rebook at the time, so they can book an appointment proactively.

Monthly Workflows for your Practice

Key metrics to look through on a monthly basis.

Doctor Summary

Found in Practice operations summary | Practice Manager

We have put together this table called **Doctor summary** to show you all the essential data by Practitioner that you might report on a monthly basis. You can download this table to Excel using the download button.

Nurse Summary

Found in Practice billings summary | Practice Manager

We have put together this table called **Nurse Summary** to show you all the essential data by Nurse that you might report on a monthly basis. You can download this table to Excel using the download button.

Other billing practitioners' summery

Found in Practice operations summary | Practice Manager

We have put together this table called **Other billing practitioners' summary** to show you all the essential data by Practitioner for Allied health and Specialists that you might report on a monthly basis. You can download this table to Excel using the download button.

Written off/deleted/cancelled *

Found in Billing optimisation | Reception Manager / Practice Manager

Review your list of services that have been written-off/ deleted/ cancelled in the last month to ensure you understand why this is happening in your practice and all services have been appropriately changed and by the authorised team member.

Outstanding debt

Found in Today's clinic metrics | Reception Manager / Practice Manager

Review your outstanding third-party debtors on a regular basis to ensure these are being followed up to improve your practice cash flow.

Appointments to be rebooked

Found in Appointment optimisation | Reception team

Review the **List of patient appts booked w/Practitioners marked as away** for a list of patient appointments that require rescheduling due to the practitioner now being marked as away in your PMS. It is important to provide patients with as much notice as possible so they can reschedule their appointment to a suitable time. Change the default time period to look further ahead in the appointment book.

Quality Improvement

Found in Quality Improvement | Practice Manager and Nurse team

In this area, you will see a range of metrics to help identify areas for Quality Improvement, highlight actionable data, and track progress through a PDSA cycle. Choose the one most relevant or the one you are currently working on in your practice.

The Quality Improvement (QI) cabinet allows you to review areas of your practice that you feel need improvement. In addition, it provides a guide to your practice team to participate in and complete QI activities that are specific to your practice.