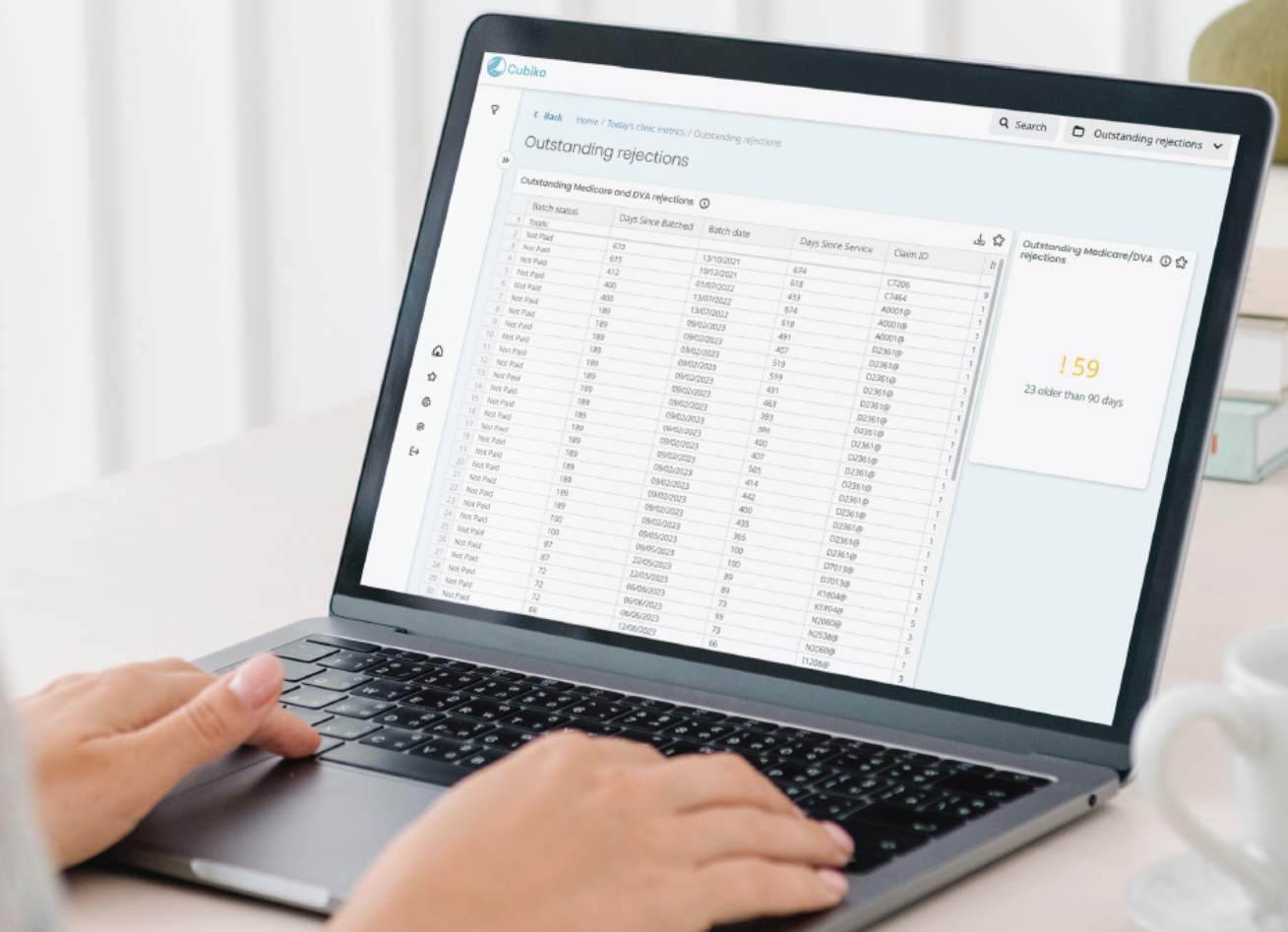




# Cubiko workflows for Practice Owners, Practice Managers and your management team



**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.

### 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 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 Practice Owners, Practice Managers and your management team

Key metrics for management to look through on a daily basis.

## Possible service opportunities today

*Found in Today's clinic metrics*

See a list of patients who are coming in for an appointment for the current day who may be eligible to have certain service item numbers such as Health Assessments, GPMPs, and vaccines completed. You can filter this list to provide the details to your individual Practitioners.

## Outstanding rejections

*Found in Today's clinic metrics*

Understand what your current level of rejections is with your Medicare and DVA online claiming and the average age of the invoices that have been rejected. Remember, you have a time limit on how long you can wait until you resubmit a rejected invoice, so keeping an eye on this daily is important.

## Recalls

*Found in Today's clinic metrics*

Gain a better understanding of your practice's recalls by seeing how many recalls are outstanding, breaking these recalls down by category type, and investigating how old these recalls are. These insights will give you an indicator of the performance of both your Practitioners and nursing team and how quickly the recalls are being followed up. Please note that we have excluded records where the test results were returned to the practice more than two years prior.

## Uncompleted patient appointments

*Found in Billing optimisation*

This set of metrics displays the number of appointments in the selected time period that are not marked as completed in your appointment book. The list of appointments that are not completed are Patient uncompleted appointments and All uncompleted appointments; the latter of these includes both patient and non-patient appointment types.



## Unbilled appointments

*Found in Billing optimisation*

Using this metric is a great way to identify any missed billing opportunities, the cause of which could range from reception staff accidentally not billing them, or the doctor not putting a billing through at the end of the consult or day. Given the additional challenges practices are dealing with, maximising cash flow from existing encounters is essential for the financial viability of the practice. With increased financial stability, the business is free to focus on caring for patients. In turn, this means more time can be spent on other activities that create more billing opportunities.

## QuickCheck

Use this metric daily to quickly and 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.

NOTE: Cubiko QuickCheck is not included in the standard Cubiko Subscription; for more information on how to get started, please see [\*\*Getting started with QuickCheck\*\*](#) on our Knowledge Base.



# Weekly workflows for Practice Owners, Practice Managers and your management team

Key metrics for management to look through on a weekly basis.

## Billings vs Target (Total Billings)

*Found in Summary of billings at the Practice*

The Total billings (by service date) metric is an overall view of the total billings within your practice; this metric is based on the service date of the invoice. This metric can assist your practice by increasing your awareness of your billings over time, based on the service date that they are provided, and be broken down by Practitioner and item number. You can enter a billing target for this metric in Settings (optional).

## Total CDM billings

*Found in Summary of billings at the Practice*

Take a closer look at your Chronic Disease Management billings. This metric can assist in tracking your Chronic Disease Management (CDM), Health Assessment and Nurse items revenue as well as potential CDM billings. This metric links to item optimisation and can help you increase your revenue and provide proactive healthcare by identifying and recalling patients who are eligible for a number of health services or reviews.

## Bulk billing rate + Private billing opportunity

*Found in Summary of billings at the Practice*

This summary figure shows what percentage of your gross billings were bulk billed for the selected date range. You can break this down via eligibility type such as 15 years and under, health care card, pension card etc. Compare this to your Private billing opportunity to review your potential earnings if you were to privately bill items you bulk-billed and understand the impact of this on your practice billings.

## Did not attend (DNA) rate

*Found in Practice operations summary*

These metrics provide more in-depth insight into the DNA rate in your practice so you can measure the impact of any DNA management processes that have been implemented to assist in reducing the number of DNAs in the practice.



## **New Patients**

*Found in Practice operations summary*

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 time period by reviewing the information in this metric and also track your new patient conversion rate.

## **Future utilisation forecast**

*Found in Future clinic metrics*

This metric provides practices with insight into their upcoming appointment book and how booked they are with patient appointments. This metric provides valuable insight to practices about their upcoming utilisation in their practice and how full your appointment book is in the coming weeks.

## **Historical 10997 opportunities**

*Found in Billing optimisation*

This metric can assist in finding appointments that were booked with your nursing team where a 10997 may have been performed but not billed.

## **Historical MT83–MT89 opportunities**

*Found in Billing optimisation*

Use this metric to look back and see missed potential MT 83–89 incentive opportunities.

## **Historical 93666 opportunities**

*Found in Billing optimisation*

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*

This metric is where you will see, broken down by Practitioner, all held accounts within your Practice Management Software (e.g. Best Practice). This is a running list with no date filter to show all billings currently on hold. This list should be reviewed regularly to finalise any held accounts.



# Monthly workflows for Practice Owners, Practice Managers and your management team

Key metrics for management to look through on a monthly basis.

## Doctor summary

*Found in Practice operations summary*

This table shows you all the essential data by Practitioner that you might report on in a monthly, weekly or quarterly capacity. You can download this table to Excel using the download button in the top right of the metric. This metric looks at consulting utilisation, billings, CDM billings, billings per patient, billings per hour, patients per hour, bulk billing percentage, total appt count & new patient count in one table for comparison.

## Nurse summary

*Found in Practice operations summary*

Similar to our Doctors' summary metric, we also pull the same data as above (minus the financials, which do not exist for Nurses)

## Other billing practitioners' summary

*Found in Practice billings summary*

Similar to our Doctors' summary metric, we also pull the same data for your other billing practitioners, such as allied health and specialists, for you to view and compare.

## Written off/deleted/cancelled invoices

*Found in Billing optimisation*

This metric provides practices with insight into any potential issues. Use it to keep track of what invoices are being written off/deleted/cancelled and reduce the risk of fraud.

## Outstanding debt

*Found in Today's clinic metrics*

This metric can help identify unpaid accounts to increase cash flow and reduce the risk of bad debt. Cash is key to the continued operation of the practice, so these metrics can be used to review and create lists for your team to chase up. Keeping debtors low not only helps with the cash flow but will also





help show your Service Fee-paying practitioners that you and the practice are working on minimising what is owed by patients or other account holders.

### **Quality improvement**

*Found in Quality improvement*

Once you have logged into Cubiko, navigate to Clinic optimisation. From there, select the cabinet Quality Improvement. 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 a QI activity that is most relevant to your practice to work on.