Cubiko for Practice Managers & Management

Key metrics to monitor and action on a daily, weekly and monthly basis.

DAILY WORKFLOW

- QuickCheck
- Possible service opportunities today & Care Prompts
- Outstanding rejections
- Recalls
- Uncompleted patient appointments
- Unbilled appointments

MONTHLY WORKFLOW

- Doctor & Nurse Summary
- Other billing practitioners' summary
- Written off / deleted / cancelled invoices
- Outstanding debt
- Quality improvement

WEEKLY WORKFLOW

- Billings v Target (Total billings)
- Total CDM billings
- Bulk billing rate
- Private billing percentage
- Did not attend (DNA) rate
- New patients
- Future utilisation forecast
- Billings on hold
- Historical 10997 opportunities
- Historical 10987 opportunities
- Historical Flu vaccine opportunities
- MyMedicare

Please refer to our **Cubiko workflows for Practice Owners, Practice Managers and your management team** Knowledge Base article for a full breakdown on how to use these metrics.

Notes

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.

Cubiko

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 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 Practice Owners, Practice Managers and your management team

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

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.

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.

This is an effective way to engage the team in delivering proactive patient care.

Care Prompts

Found in Today's clinic metrics

Use in conjunction with QuickCheck to streamline communication between your team and practitioners. With Care Prompts, you can instantly send care opportunities from the Possible service opportunities today list directly to the Best Practice appointment book. This paperless workflow ensures that practitioners can easily view and act on key services patients may be eligible for, such as Health Assessments or GPCCMPs, during their scheduled appointment. It supports timely conversations and helps ensure patients don't miss out on important care.

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.

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.

Percentage of total billings bulk billed

Found in Past clinic metrics

The Percentage of total billing bulk billed metric provides insight into the proportion of bulk billing compared to all other billings at your practice, including all custom items and not limited to just MBS or DVA items.

Private billing percentage

Found in Past clinic metrics

You can use the Private Billing Percentage metric to understand the proportion of the total billings that were not paid by Medicare or DVA. This metric also allows you to calculate the percentage of private billings by Practitioner using the private billings calculator.

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.

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.

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 10987 opportunities

Found in Billing optimisation

This metric can assist in finding appointments that were booked with your nursing team where a 10987 may have been performed but not billed.

Cubiko

Historical flu vaccine opportunities

Found in Billing optimisation

Using this metric, you will find two tabs identifying potential gaps in flu vaccine billing data. The first tab lists vaccine immunisation records that have a visitID linked to visits at your practice that do not have a corresponding invoice with a service date for the day the immunisation was administered. The second tab allows you to review all vaccinations with invoices at your practice for any other irregularities.

MyMedicare

Found in MyMedicare

Utilise these metrics to identify patients in your practice who are registered for MyMedicare and determine those who are still to be registered. This enables you to take actionable steps to enhance patient care and unlock additional Medicare benefits for both your patients and practice.

- *For MedicalDirector users, please refer to our Knowledge Base article* ***MyMedicare - for Medical Director.***
- *For Best Practice users, please refer to our Knowledge Base article* ***MyMedicare - Guide to exporting and importing CSV patient list into Cubiko***

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.