Cubiko for Receptionists

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

DAILY WORKFLOW

- ○ Unconfirmed appointments today
- ○ MyMedicare eligible patients with an appointment today
- ○ QuickCheck
- ○ Possible service opportunities today & Care Prompts
- ○ Recall appointments to rebook
- ○ Appointments that may not be eligible for a Medicare-subsidised Telehealth services
- ○ Appointment day sheet

WEEKLY WORKFLOW

- ○ Rebooking rate
- ○ Outstanding debt
- ○ Cancelled appointments

MONTHLY WORKFLOW

- ○ Appointments to be rebooked

Please refer to our **Cubiko workflows for Receptionists** Knowledge Base article for a full breakdown on how to use these metrics.

Notes

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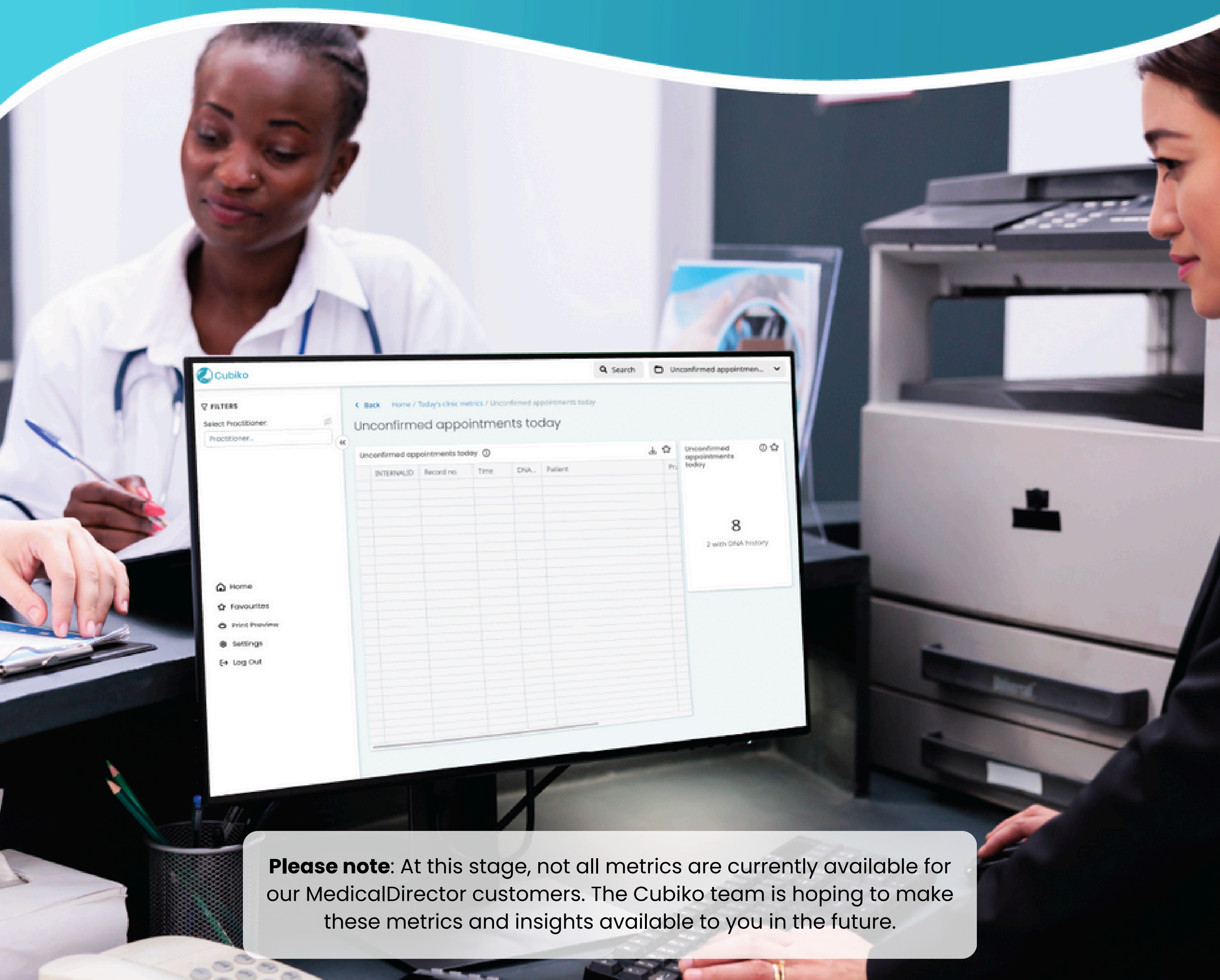
Cubiko workflows for your Reception team



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 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.

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Daily workflows for your Reception team

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

Unconfirmed appointments today

Found in Today's clinic metrics

Check and confirm unconfirmed appointments. Here you can see your patients who frequently Did Not Attend (DNA) and ensure that they adhere to your cancellation policy.

MyMedicare-eligible patients with an appointment today

Found in Today's clinic metrics

This list can be used daily to flag potential discussions with patients to register as they attend the upcoming appointment. Use the "Unregistered patients" tab and scroll down the page to the list of MyMedicare unregistered patients. This table will show you the appointment details, patient details, number of face-to-face visits in the last two years and last face-to-face visit.

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.

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, and 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.

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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.

Recall appointments to rebook
Found in Today's clinic metrics

Check patients who did not attend a recall appointment type and do not have a subsequent appointment booked or completed in the diary.

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

Check this daily to look ahead at any patient booked in for a telehealth appointment that has not had a face-to-face item billed in the last 12 months.

Appointment day sheet
Found in Appointment optimisation

Make it a daily practice to print out a list of the day's upcoming patient appointments. This list is crucial for several reasons: it ensures you have access to patient information during planned or unplanned power outages, allows you to efficiently check upcoming vaccine appointments and contact patients who may need to reschedule, and enables you to send bulk SMS notifications via your third-party booking software.

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Weekly workflows for your Reception team

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

Rebooking rate
Found in Appointment optimisation

Check this weekly to review the appointment types that warrant follow-up/review and call to rebook patients (such as skin checks, GPMP and TCA, etc.) You can use the filters to review specific appointment types and ensure a follow-up appointment is booked.

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. Check this at the beginning of each week to identify patients coming in for an appointment and flag prior to the patient attending.

Cancelled appointments
Found in Past clinic metrics

Utilise the "List of Cancelled Appointments" within this metric on a weekly basis to identify patients who have cancelled without upcoming appointments. Reach out to these patients to reschedule. Begin by reviewing the "Reason for Cancelling" column to determine if rescheduling is appropriate. Use the filtering option in this column to prioritise specific appointment types, such as "Care Plan," for rebooking.

Monthly workflows for your Reception team

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

Appointments to be rebooked
Found in Appointment optimisation

This metric will look at any patients booked in with a patient where the doctor is marked away/unavailable. Review this and reschedule patients booked in when Practitioners are away or the clinic is closed.