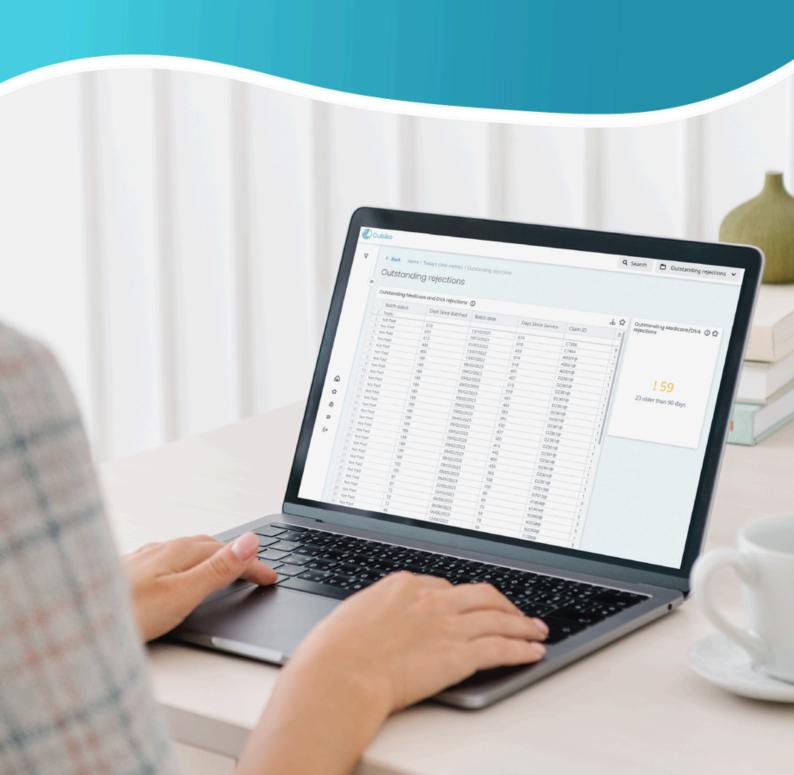# Cubiko workflows for Practice Owners, Practice Managers and your management team

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, 10997s, and 10987s. 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.

Unbatched invoices
Found in Today's clinic metrics

Regularly monitoring your practice's unbatched invoices plays an important role in the financial health and stability of your practice. By identifying eligible invoices that have not yet been batched to Medicare or DVA, you reduce the risk of invoices for eligible services going unpaid.

It's important that you and your team take prompt action to action these invoices by creating a new batch through online claiming in your practice management system (Zedmed). This ensures a smooth submission process, guaranteeing that these invoices are promptly actioned.

Uncompleted appointment rate
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 for all appointment booking methods. Appointments are considered uncomplete if they are missed and have not been marked as attended or remain current once the date of the scheduled appointment has passed.

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.

 Cubiko

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

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

Total Billings
Found in Past Clinic Metrics

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).

Payments by paid date
Found in Past Clinic Metrics

View total practice payments (including GST) for a selected period and compare performance to the same time last year. You can use these metrics to dig deeper by getting a breakdown by practitioner, item, and appointment type to see where your revenue is coming from and identify areas for improvement.

Total CDM billings
Found in Past Clinic Metrics

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.

Future unbooked appointments
Found in Future clinic metrics

Gain insight into the total number of appointments and hours that are available to be booked over the next 7 days. You can use this metric to look ahead to see how many appointments or hours that are still available to be booked. Your team can then proactive contact patients to get these slots filled.

New Patients
Found in Past Clinic Metrics

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.

Appointment Count
Found in Past Clinic Metrics

This metric provides practices with insight into their total number of appointments completed/invoiced/paid over a selected period. Some practices may consider this as the number of patients seen for the selected period.

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

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

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.

Active patients
Found in Patient cohort analysis

Gain insight into the number of active patients as per the RACGP Guidelines (3 or more visits in the past 2 years).

Cancelled appointments
Found in Appointment optimisation

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.

Clinic consulting utilisation
Found in Past Clinic Metrics

This metric contains data about the proportion of available time that has been booked and spent consulting with patients. You can use this information to understand if Practitioners are utilising their time effectively whilst in the Practice.

Average billings per patient
Found in Past Clinic Metrics

Get insight into the type of patient base your Practice is working with by gaining insight into the average amount billed (inclusive of GST) to each individual patient for the selected period.

Appointments per consulting hour
Found in Past Clinic Metrics

This metric shows how many patients Practitioners consult on average over an hour and how it is tracking compared to the practice goal for the period selected.

Average billings per consulting hour
Found in Past Clinic Metrics

Get an overview of your practice billings per consulting hour (inclusive of GST) and track how it is measuring against your practice targets for the selected period.

Doctor summary
Found in Past Clinic Metrics

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 Past Clinic Metrics

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