





# 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. Download a list and contact these patients to confirm if they will be attending their appointment today, or if you can free up this appointment for other patients.

## 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, 10997s, and 10987s. You can filter this list to provide the details to your individual Practitioners.

## 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 take prompt action on 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.

## Clinic utilisation today

*Found in Today's clinic metrics*

This figure shows the proportion of available time that has been booked to see patients today. Higher numbers may indicate that your team is more heavily booked.



## **Days till third next available appointment**

*Found in Future Clinic Metrics*

Review your average days until the third next available appointment for each Practitioner. This can be used to measure appointment delay and available capacity.

## **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.

## **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.



# Weekly workflows for your Reception team

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

## 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 GPMP and TCA, etc.) You can use the filters to review specific appointment types and ensure a follow-up appointment is booked.