

O&G ADMIN TRAINING MANUAL

Content:

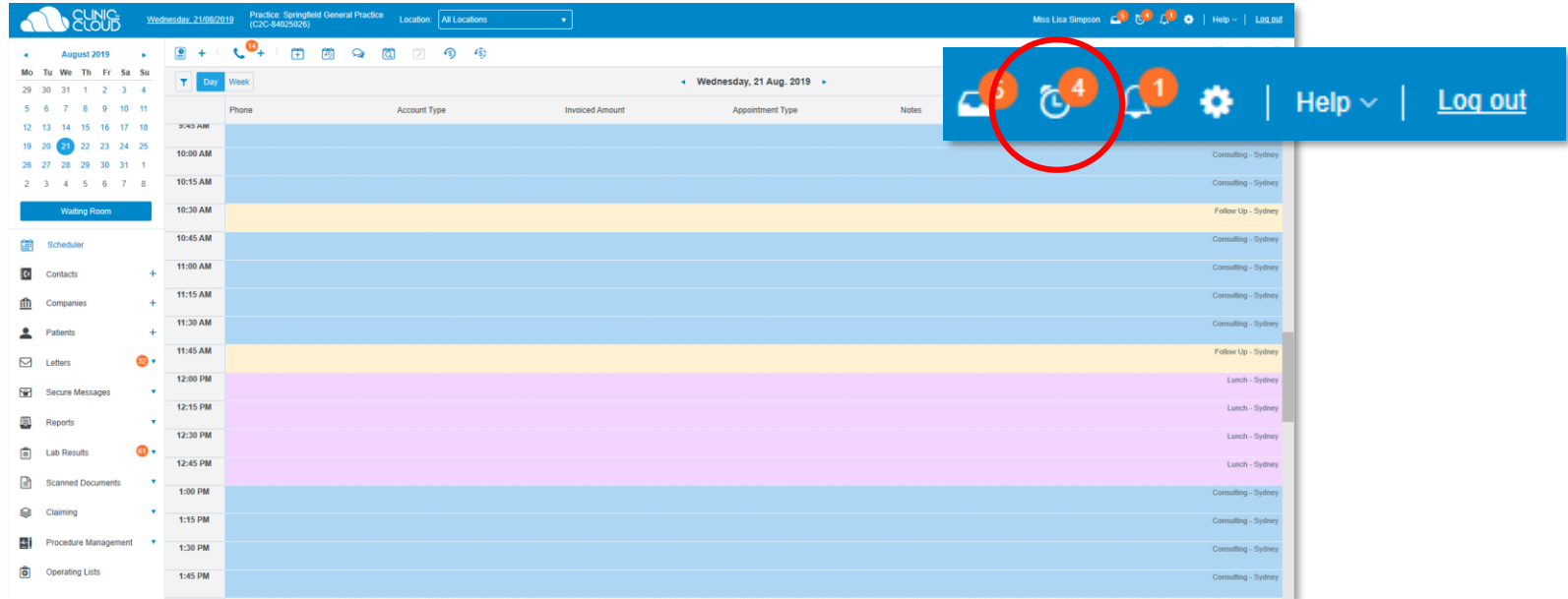
1. [eTasks](#)
2. [Booking Appointments](#)
3. [Patient Profile](#)
4. [Invoicing](#)
5. [Claiming](#)
6. [Letters](#)
7. [Reports](#)
8. [Templates](#)
9. [Procedure Management](#)
10. [Scanned Documents](#)
11. [Lab Results](#)
12. [Secure Messaging](#)
13. [Help Centre](#)



1

eTasks

Learn how to Add/Edit eTasks [here!](#)

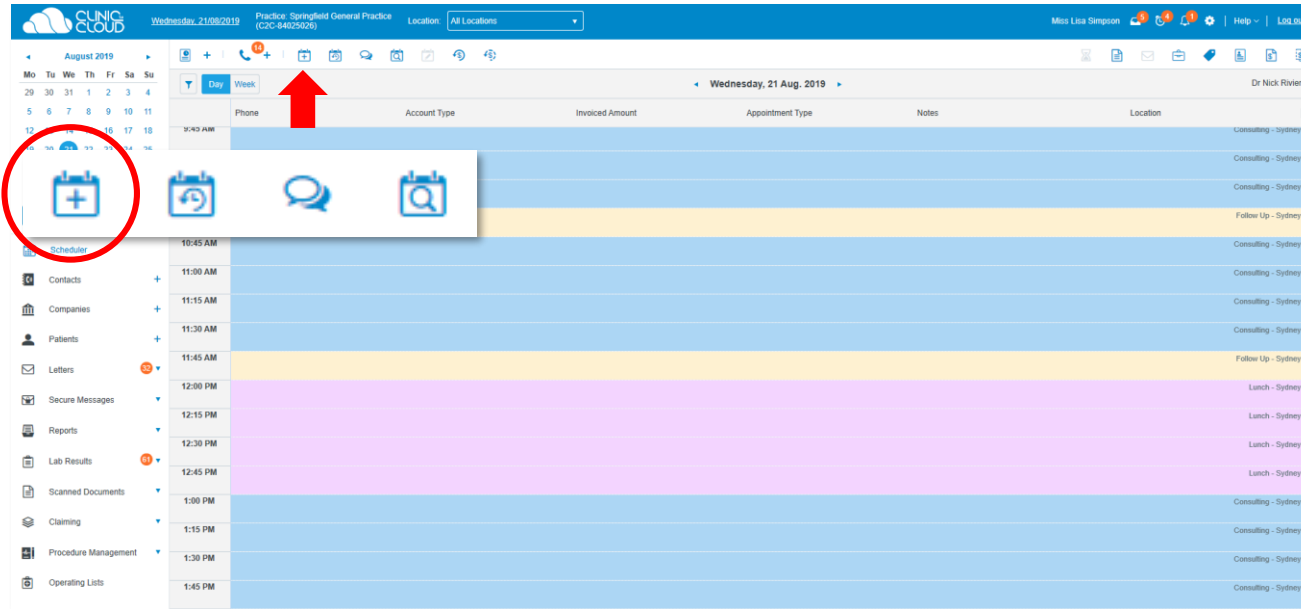



The screenshot shows the CLINIC CLOUD interface for Wednesday, 21 Aug. 2019. The top navigation bar includes a Home icon with a notification badge of 5, a Refresh icon with a badge of 4, a Notifications icon with a badge of 1, and a Settings gear icon. A red circle highlights these icons. Below the navigation bar is a calendar view for August 2019 and a table of appointments for Wednesday, 21 Aug. 2019. The appointment table has columns for Phone, Account Type, Invoiced Amount, Appointment Type, and Notes. The appointments are scheduled from 10:00 AM to 1:45 PM, with various appointment types such as 'Consulting - Sydney', 'Follow Up - Sydney', and 'Lunch - Sydney'.

2A

Booking Appointments

Learn how to **Book an Appointment** for a **new patient** [here](#) and for an **existing patient** [here](#)!



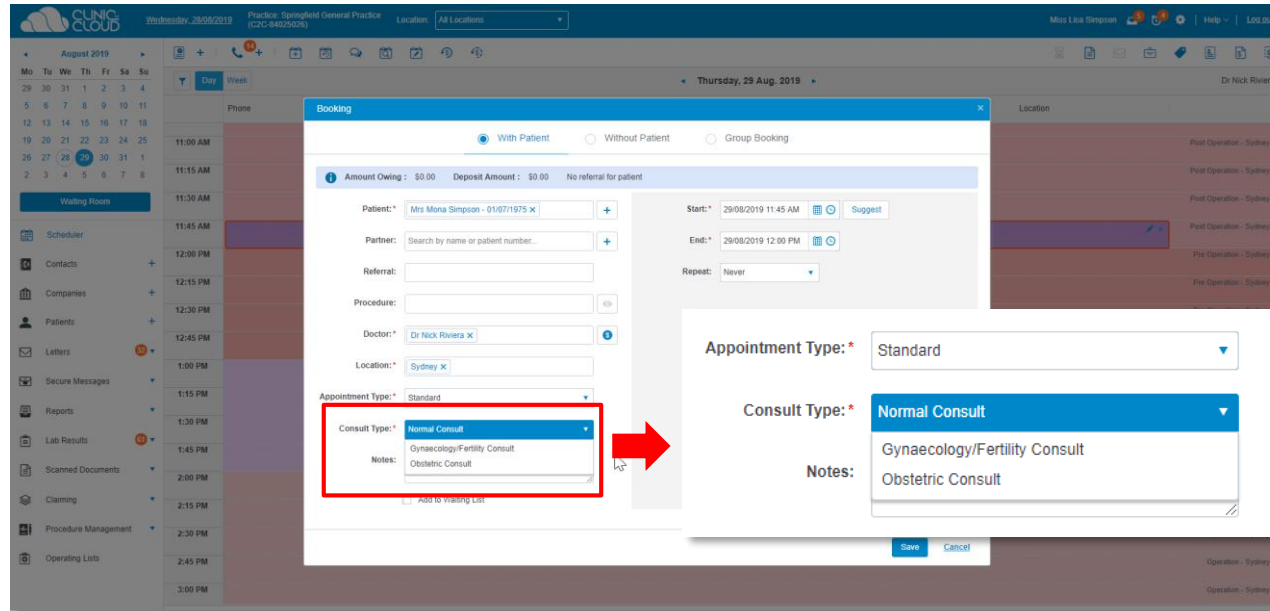
The screenshot displays the CLINIC CLOUD interface for a practice named 'Springfield General Practice'. The top navigation bar includes the date 'Wednesday, 21/08/2019', the practice name, location 'All Locations', and user information 'Miss Lisa Simpson'. A sidebar on the left contains navigation options: Scheduler, Contacts, Companies, Patients, Letters, Secure Messages, Reports, Lab Results, Scanned Documents, Claiming, Procedure Management, and Operating Lists. The main area shows a calendar for August 2019 and a detailed view for Wednesday, 21 Aug. 2019. A table below the calendar lists appointments with columns for Time, Phone, Account Type, Invoiced Amount, Appointment Type, Notes, and Location. A red circle highlights the 'Book Appointment' icon (a calendar with a plus sign) in the top toolbar, and a red arrow points to the same icon in the top toolbar.

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location
10:45 AM				Consulting - Sydney		Consulting - Sydney
11:00 AM				Consulting - Sydney		Consulting - Sydney
11:15 AM				Consulting - Sydney		Consulting - Sydney
11:30 AM				Consulting - Sydney		Consulting - Sydney
11:45 AM				Follow Up - Sydney		Follow Up - Sydney
12:00 PM				Lunch - Sydney		Lunch - Sydney
12:15 PM				Lunch - Sydney		Lunch - Sydney
12:30 PM				Lunch - Sydney		Lunch - Sydney
12:45 PM				Lunch - Sydney		Lunch - Sydney
1:00 PM				Consulting - Sydney		Consulting - Sydney
1:15 PM				Consulting - Sydney		Consulting - Sydney
1:30 PM				Consulting - Sydney		Consulting - Sydney
1:45 PM				Consulting - Sydney		Consulting - Sydney

2B

Booking Appointments

Learn how to pick the correct **Consult Type** for the Doctor below:



The screenshot displays the CLINIC CLOUD interface for booking an appointment. The main window shows a calendar for August 2019, with the date Thursday, 29 Aug. 2019 selected. A 'Booking' modal is open, showing the following details:

- Booking Type:** With Patient (selected), Without Patient, Group Booking
- Amount Owing:** \$0.00, **Deposit Amount:** \$0.00, **No referral for patient**
- Patient:** Mrs Mona Simpson - 01/07/1975
- Partner:** Search by name or patient number.
- Referral:** (empty)
- Procedure:** (empty)
- Doctor:** Dr Nick Riviera
- Location:** Sydney
- Appointment Type:** Standard
- Consult Type:** Normal Consult (highlighted with a red box and an arrow)
- Notes:** Gynaecology/Fertility Consult, Obstetric Consult
- Start:** 29/08/2019 11:45 AM
- End:** 29/08/2019 12:00 PM
- Repeat:** Never

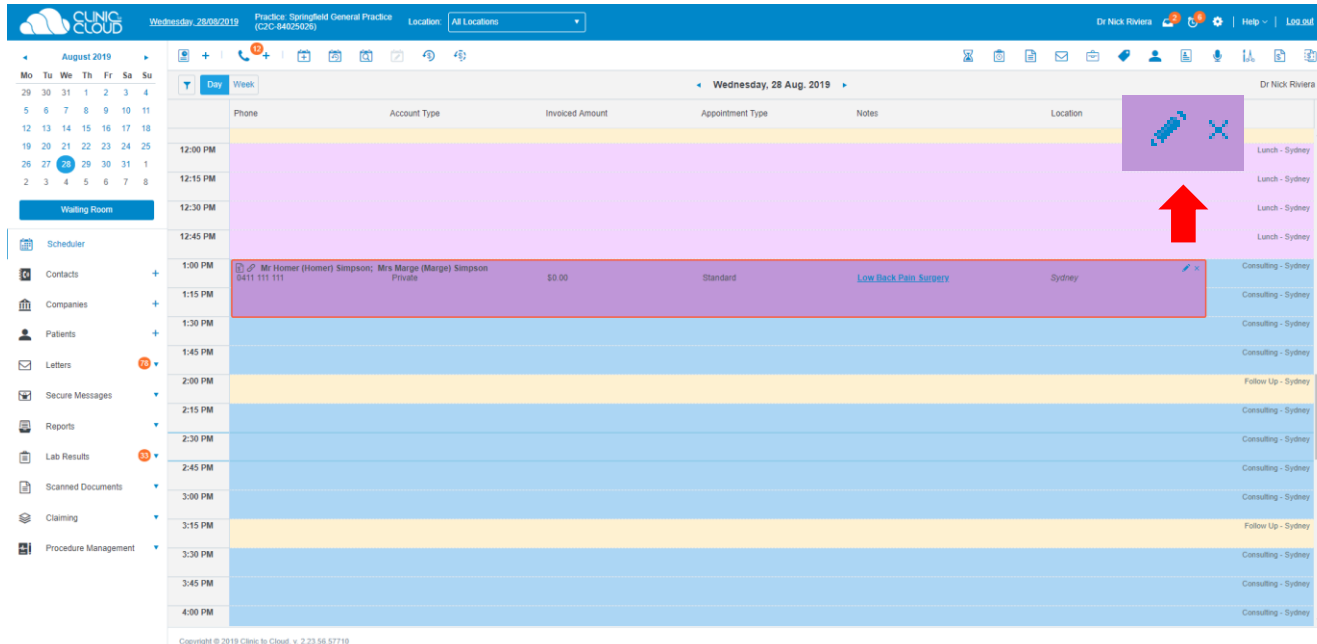
The detailed view of the 'Consult Type' dropdown shows the following options:

- Standard
- Normal Consult** (highlighted)
- Gynaecology/Fertility Consult
- Obstetric Consult

2C

Booking Appointments

Manually confirm/cancel appointment by clicking edit or cancel



The screenshot displays the CLINIC CLOUD scheduler interface. At the top, the header shows the date 'Wednesday, 28 Aug. 2019', the practice name 'Springfield General Practice (C2C-84025028)', and the location 'All Locations'. The user is identified as 'Dr Nick Riviera'. A navigation bar includes icons for home, calendar, appointments, messages, and other functions.

On the left, a sidebar menu contains options like 'Scheduler', 'Contacts', 'Companies', 'Patients', 'Letters', 'Secure Messages', 'Reports', 'Lab Results', 'Scanned Documents', 'Claiming', and 'Procedure Management'. A calendar view for August 2019 is visible, with the 28th highlighted.

The main area shows a detailed appointment schedule for Wednesday, 28 Aug. 2019. The schedule is organized by time slots. A specific appointment is highlighted in purple, with the following details:

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location	Actions
1:00 PM	0411 111 111	Private	\$0.00	Standard	Low Back Pain Surgery	Sydney	[Edit]

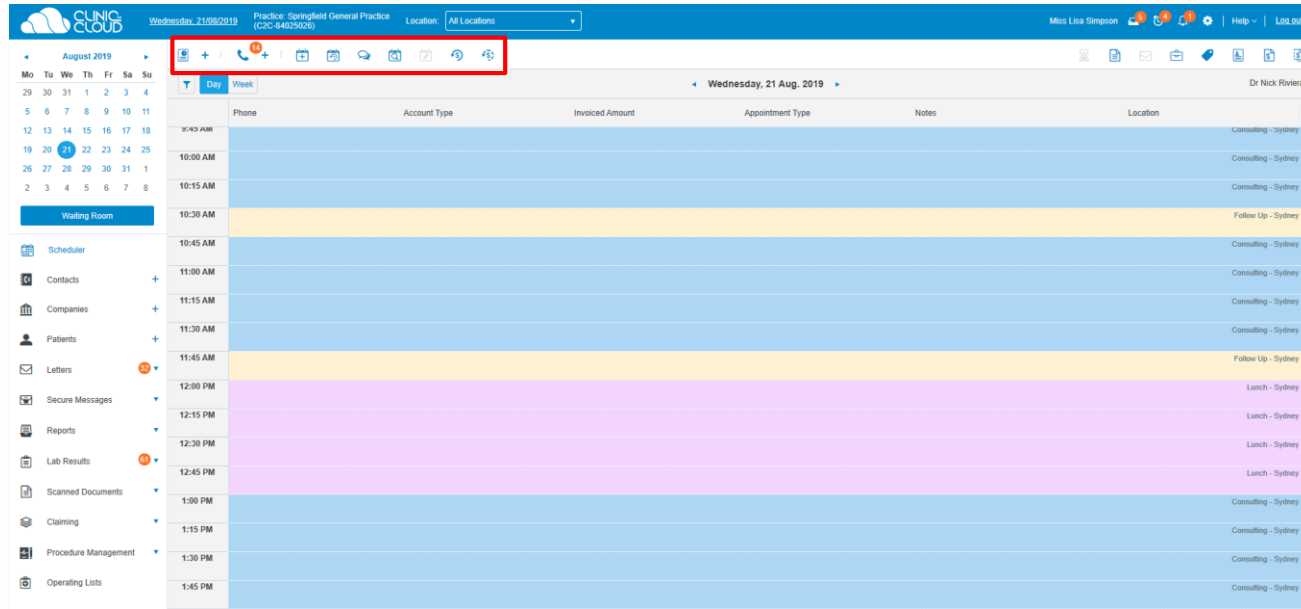
A red arrow points to the edit icon (a pencil) on the right side of the highlighted appointment row. Other appointments in the schedule include 'Lunch - Sydney' and 'Consulting - Sydney'.

At the bottom left, the footer text reads: 'Copyright © 2019 Clinic to Cloud v. 2.71.56.5719'.

2D

Booking Appointments

Learn how to use the **Waiting List**, **Recalls** and **Send a Manual SMS** [here!](#)



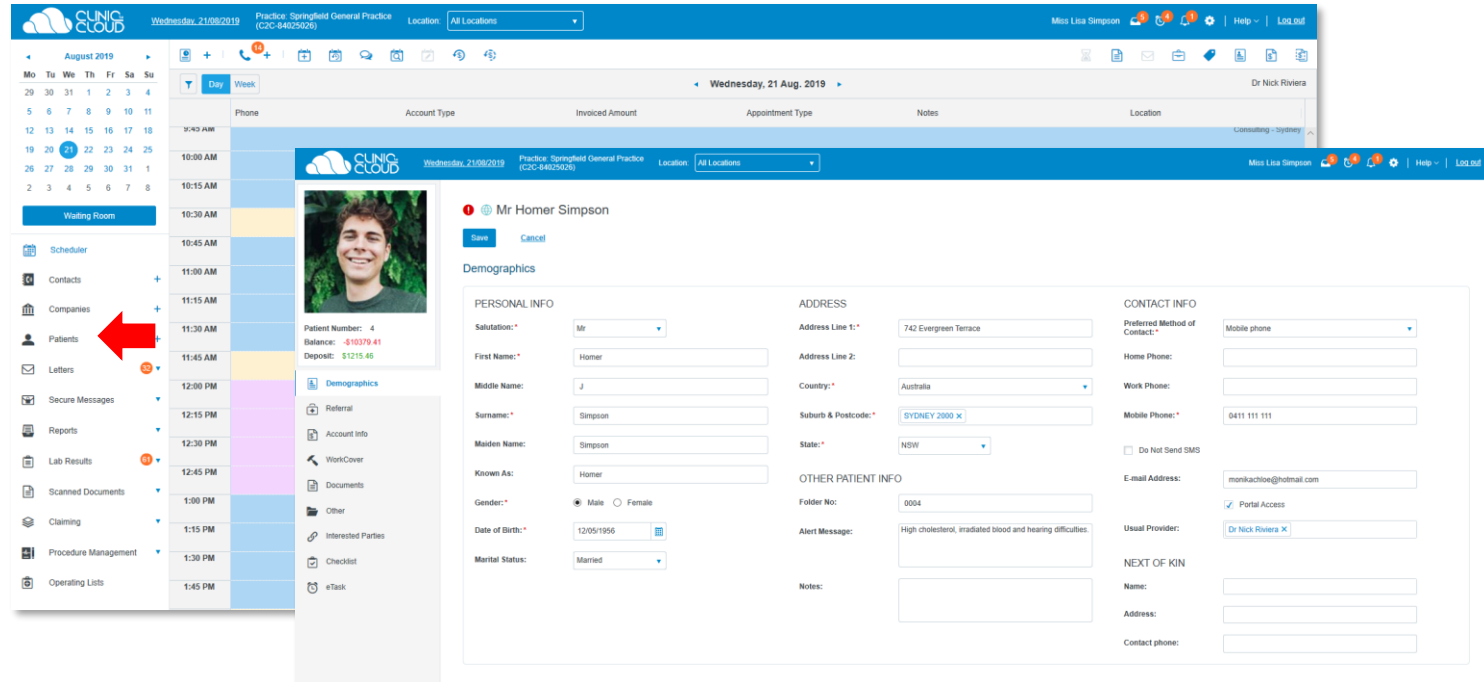
The screenshot displays the CLINIC CLOUD interface for Springfield General Practice (CZC-34625026). The top navigation bar includes the date (Wednesday, 21/08/2019), practice name, location (All Locations), and user information (Miss Lisa Simpson). A red box highlights the top navigation bar containing icons for adding appointments, phone calls, and other actions.

The main interface shows a calendar for August 2019 on the left, with the 21st highlighted. The central area displays a list of appointments for Wednesday, 21 Aug. 2019, with columns for Phone, Account Type, Invoiced Amount, Appointment Type, Notes, and Location. The appointments are scheduled from 10:00 AM to 1:45 PM. A 'Waiting Room' button is visible below the calendar.

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location
10:00 AM				Consulting - Sydney		Consulting - Sydney
10:15 AM				Consulting - Sydney		Consulting - Sydney
10:30 AM				Follow Up - Sydney		Follow Up - Sydney
10:45 AM				Consulting - Sydney		Consulting - Sydney
11:00 AM				Consulting - Sydney		Consulting - Sydney
11:15 AM				Consulting - Sydney		Consulting - Sydney
11:30 AM				Consulting - Sydney		Consulting - Sydney
11:45 AM				Follow Up - Sydney		Follow Up - Sydney
12:00 PM				Lunch - Sydney		Lunch - Sydney
12:15 PM				Lunch - Sydney		Lunch - Sydney
12:30 PM				Lunch - Sydney		Lunch - Sydney
12:45 PM				Lunch - Sydney		Lunch - Sydney
1:00 PM				Consulting - Sydney		Consulting - Sydney
1:15 PM				Consulting - Sydney		Consulting - Sydney
1:30 PM				Consulting - Sydney		Consulting - Sydney
1:45 PM				Consulting - Sydney		Consulting - Sydney

Patient Profile

Learn how to manage the **Patient's Profile!**



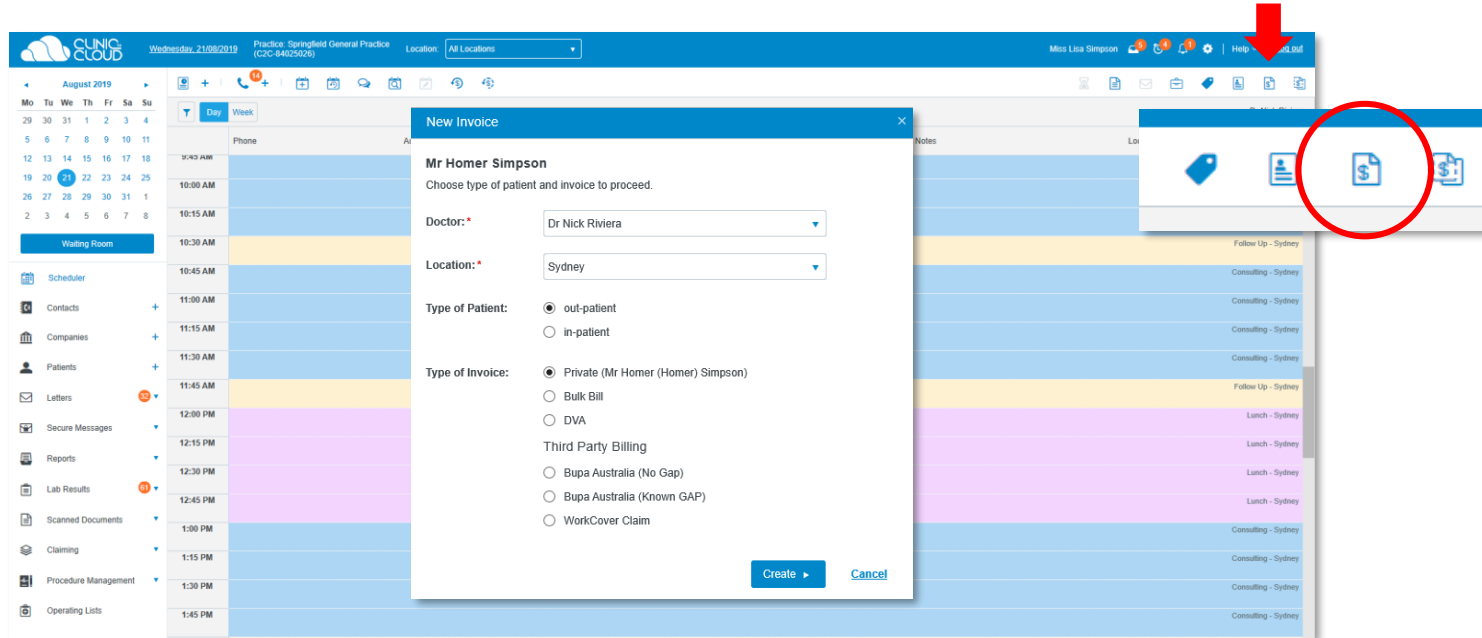
The screenshot displays the CLINIC CLOUD interface for a patient profile. The top navigation bar includes the date (Wednesday, 21/08/2019), practice name (Springfield General Practice), and location (All Locations). The main content area is divided into several sections:

- Calendar:** A calendar view for August 2019, with a 'Waiting Room' button below it.
- Sidebar:** A vertical menu on the left with options like Scheduler, Contacts, Companies, Patients (highlighted with a red arrow), Letters, Secure Messages, Reports, Lab Results, Scanned Documents, Claiming, Procedure Management, and Operating Lists.
- Patient Photo:** A photo of Mr Homer Simpson with a patient ID of 4, a balance of -\$10379.43, and a deposit of \$1215.46.
- Demographics Form:** A form for editing patient information, including:
 - PERSONAL INFO:** Salutation (Mr), First Name (Homer), Middle Name (J), Surname (Simpson), Maiden Name (Simpson), Known As (Homer), Gender (Male), Date of Birth (12/05/1956), and Marital Status (Married).
 - ADDRESS:** Address Line 1 (742 Evergreen Terrace), Address Line 2, Country (Australia), Suburb & Postcode (SYDNEY 2000 X), and State (NSW).
 - CONTACT INFO:** Preferred Method of Contact (Mobile phone), Home Phone, Work Phone, Mobile Phone (0411 111 111), and Do Not Send SMS (unchecked).
 - OTHER PATIENT INFO:** Folder No (0004) and Alert Message (High cholesterol, irradiated blood and hearing difficulties).
 - NEXT OF KIN:** Name, Address, and Contact phone fields.

4

Invoicing

Learn how to create the right type of Invoice [here!](#)

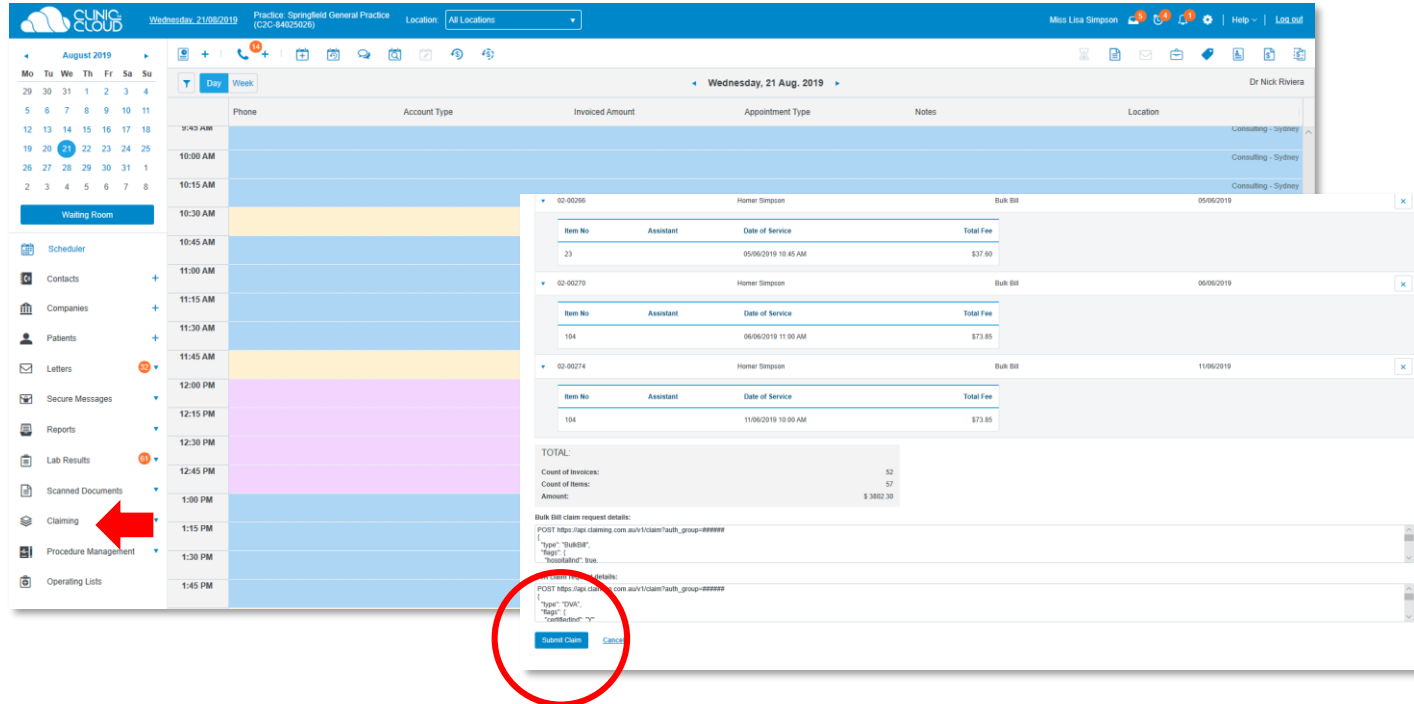


The screenshot displays the CLINIC CLOUD software interface. A 'New Invoice' dialog box is open in the center, titled 'New Invoice' with a close button (X). The patient name is 'Mr Homer Simpson'. Below the name, it says 'Choose type of patient and invoice to proceed.' The 'Doctor' field is set to 'Dr Nick Riviera' and the 'Location' field is set to 'Sydney'. Under 'Type of Patient', the 'out-patient' radio button is selected. Under 'Type of Invoice', the 'Private (Mr Homer (Homer) Simpson)' radio button is selected. Other options include 'Bulk Bill', 'DVA', 'Third Party Billing', 'Bupa Australia (No Gap)', 'Bupa Australia (Known GAP)', and 'WorkCover Claim'. At the bottom of the dialog are 'Create' and 'Cancel' buttons.

In the background, a calendar view for August 2019 is visible on the left, and a patient list is on the right. A red arrow points to the 'Invoices' icon (a document with a dollar sign) in the top right navigation bar, which is also circled in red.

Claiming

Learn how to submit **Medicare Claims** [here](#) and how to submit **ECLIPSE Claims** [here](#).



The screenshot displays the CLINIC CLOUD interface for Springfield General Practice. The main view is a calendar for Wednesday, 21 Aug. 2019, showing a schedule of appointments. A red arrow points to the 'Claiming' option in the left-hand navigation menu.

An overlay window titled 'Bulk Bill' is open, showing a summary of claims for three dates: 05/06/2019, 06/06/2019, and 11/06/2019. The summary table is as follows:

Item No	Assistant	Date of Service	Total Fee
23		05/06/2019 10:45 AM	\$37.80
104		06/06/2019 11:00 AM	\$73.85
104		11/06/2019 10:00 AM	\$73.85

Below the table, a 'TOTAL' section shows:

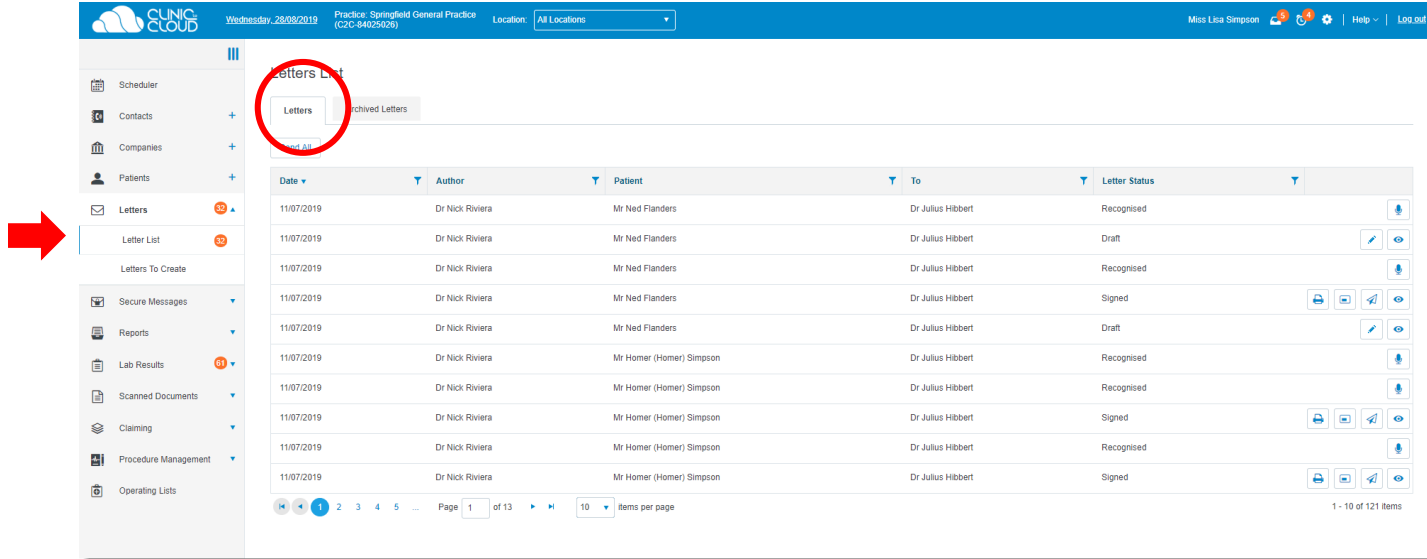
- Count of Invoices: 52
- Count of Items: 57
- Amount: \$ 3802.30

At the bottom of the window, there are fields for 'Bulk Bill claim request details' and 'Invoice details', both containing POST URLs. A red circle highlights the 'Submit Claim' button at the bottom of the window.

6

Letters

Learn how to manage the **Letters List** [here!](#)



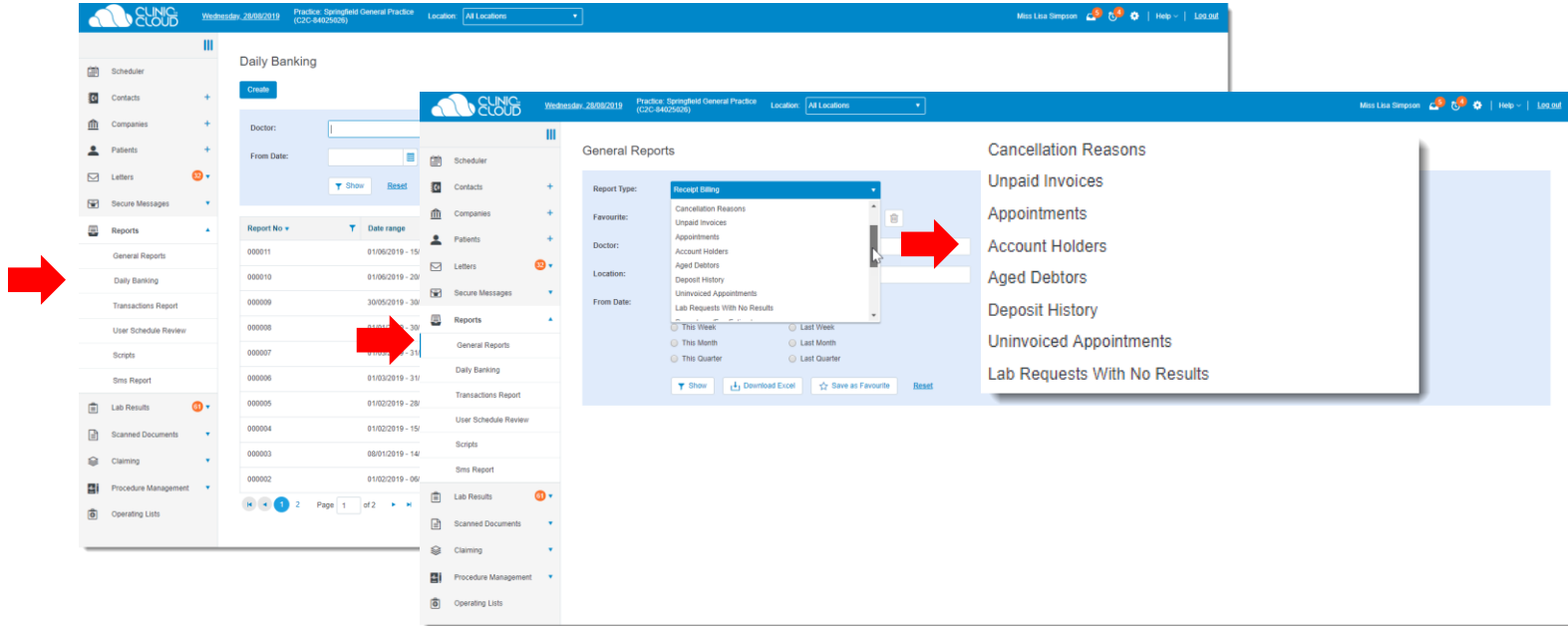
The screenshot shows the CLINIC CLOUD interface for Springfield General Practice. The top navigation bar includes the date (Wednesday, 28/09/2019), practice name, location (All Locations), and user name (Miss Lisa Simpson). The left sidebar contains various menu items, with 'Letters List' highlighted and circled in red. A red arrow points to this menu item from the left. The main content area displays a table of letters with columns for Date, Author, Patient, To, and Letter Status. The table contains 12 rows of data, with the first row being 'Recognised' and the second being 'Draft'. The bottom of the page shows pagination information: Page 1 of 13, 10 items per page, and 1 - 10 of 121 items.

Date	Author	Patient	To	Letter Status
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius Hibbert	Recognised
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius Hibbert	Draft
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius Hibbert	Recognised
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius Hibbert	Signed
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius Hibbert	Draft
11/07/2019	Dr Nick Riviera	Mr Homer (Homer) Simpson	Dr Julius Hibbert	Recognised
11/07/2019	Dr Nick Riviera	Mr Homer (Homer) Simpson	Dr Julius Hibbert	Recognised
11/07/2019	Dr Nick Riviera	Mr Homer (Homer) Simpson	Dr Julius Hibbert	Signed
11/07/2019	Dr Nick Riviera	Mr Homer (Homer) Simpson	Dr Julius Hibbert	Recognised
11/07/2019	Dr Nick Riviera	Mr Homer (Homer) Simpson	Dr Julius Hibbert	Signed

7

Reports

Learn how to complete your **Daily Banking** and run useful **Reports!**



The screenshot displays the CLINIC CLOUD web interface. The left sidebar contains a navigation menu with the following items: Scheduler, Contacts, Companies, Patients, Letters, Secure Messages, Reports, General Reports, Daily Banking, Transactions Report, User Schedule Review, Scripts, Sms Report, Lab Results, Scanned Documents, Claiming, Procedure Management, and Operating Lists. The 'Reports' menu item is highlighted with a red arrow.

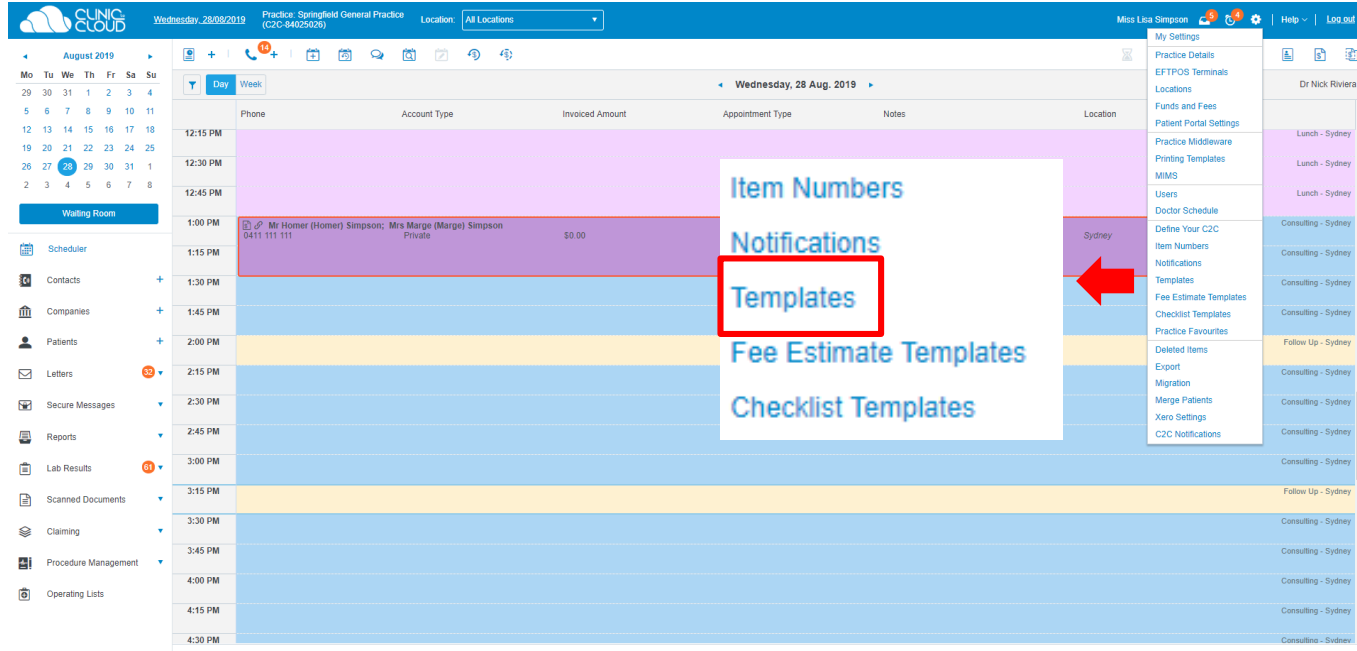
The main content area is divided into two sections. The top section is titled 'Daily Banking' and includes a 'Create' button, a 'Doctor' dropdown, a 'From Date' field, and 'Show' and 'Reset' buttons. Below this is a table with columns for 'Report No' and 'Date range'. The bottom section is titled 'General Reports' and features a 'Report Type' dropdown menu. The dropdown menu is open, showing a list of report types: Receipt Billing, Cancellation Reasons, Unpaid Invoices, Appointments, Account Holders, Aged Debtors, Deposit History, Uninvoiced Appointments, and Lab Requests With No Results. The 'Unpaid Invoices' option is highlighted with a red arrow.

Below the 'General Reports' section, there is a list of report types: Cancellation Reasons, Unpaid Invoices, Appointments, Account Holders, Aged Debtors, Deposit History, Uninvoiced Appointments, and Lab Requests With No Results. The 'Unpaid Invoices' option is highlighted with a red arrow.

8

Templates

Learn how to create Document and Letter **Templates** [here!](#)



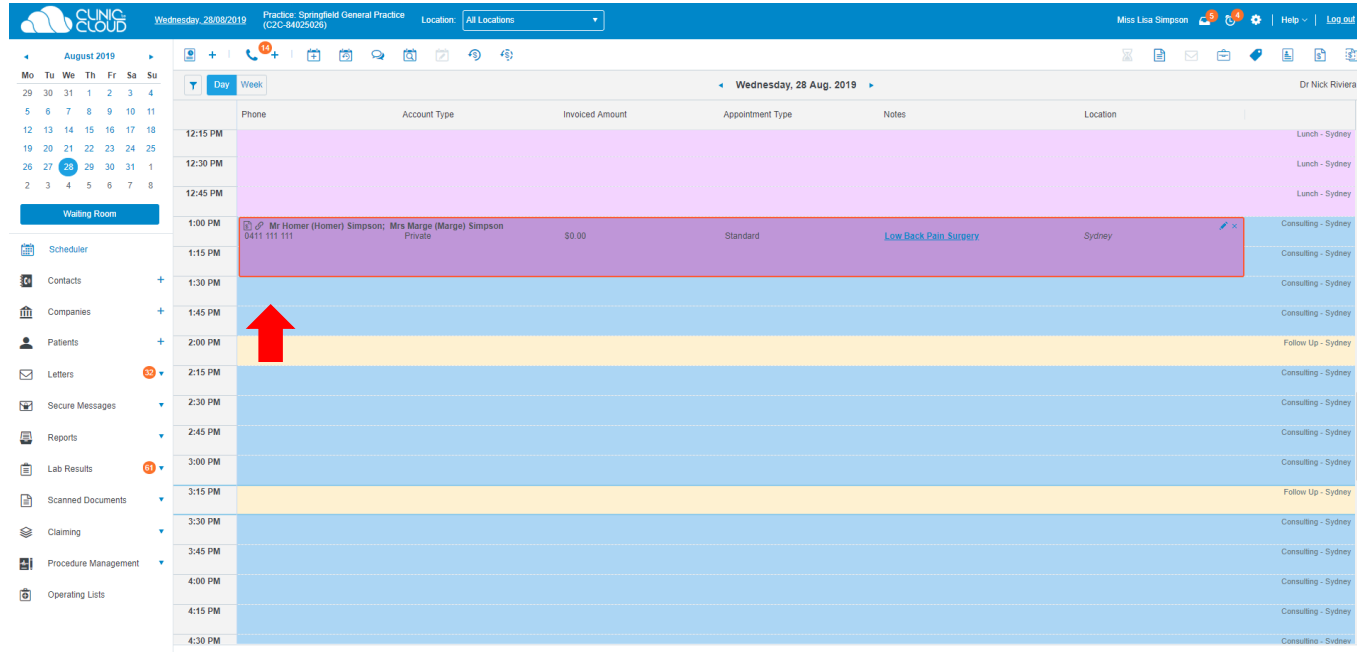
The screenshot displays the CLINIC CLOUD interface for Springfield General Practice (C2C-84025026) on Wednesday, 28 Aug. 2019. The main area shows a calendar with a patient appointment at 1:00 PM for Mr Homer (Homer) Simpson and Mrs Marge (Marge) Simpson. A red box highlights the 'Templates' menu item in the right-hand navigation pane, with a red arrow pointing to it. A white callout box lists various template categories: Item Numbers, Notifications, Templates, Fee Estimate Templates, and Checklist Templates.

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location
12:15 PM						
12:30 PM						
12:45 PM						
1:00 PM	0411 111 111	Privata	\$0.00			Sydney
1:15 PM						
1:30 PM						
1:45 PM						
2:00 PM						
2:15 PM						
2:30 PM						
2:45 PM						
3:00 PM						
3:15 PM						
3:30 PM						
3:45 PM						
4:00 PM						
4:15 PM						
4:30 PM						

9

Procedure Management

Learn how to create a [Fee Estimate](#), [Book Procedure Appointment](#) and print the [Operation List](#).



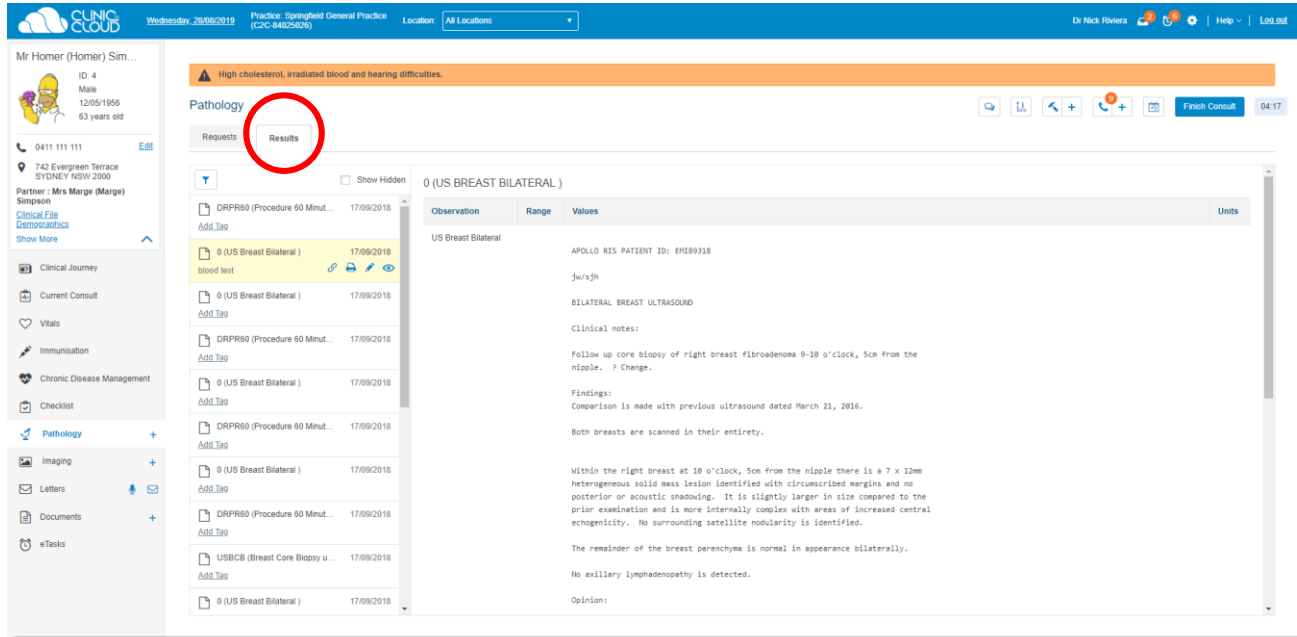
The screenshot displays the CLINIC CLOUD interface for 'Practice: Springfield General Practice (C2C-84025026)' on 'Wednesday, 28/08/2019'. The main area shows a calendar view for Wednesday, 28 Aug. 2019, with a list of appointments. A procedure for 'Mr Homer (Homer) Simpson; Mrs Marge (Marge) Simpson' is highlighted in purple, scheduled for 1:00 PM at 'Sydney' with the procedure name 'Low Back Pain Surgery'. The interface includes a left sidebar with navigation options like 'Scheduler', 'Contacts', 'Companies', 'Patients', 'Letters', 'Secure Messages', 'Reports', 'Lab Results', 'Scanned Documents', 'Claiming', 'Procedure Management', and 'Operating Lists'. A red arrow points to the 'Procedure Management' menu item. Another red arrow points to the top right corner of the interface, near the user profile 'Miss Lisa Simpson' and 'Log out' button.

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location	Dr Nick Riviera
12:15 PM							Lunch - Sydney
12:30 PM							Lunch - Sydney
12:45 PM							Lunch - Sydney
1:00 PM	0411 111 111	Private	\$0.00	Standard	Low Back Pain Surgery	Sydney	Consulting - Sydney
1:15 PM							Consulting - Sydney
1:30 PM							Consulting - Sydney
1:45 PM							Consulting - Sydney
2:00 PM							Follow Up - Sydney
2:15 PM							Consulting - Sydney
2:30 PM							Consulting - Sydney
2:45 PM							Consulting - Sydney
3:00 PM							Consulting - Sydney
3:15 PM							Follow Up - Sydney
3:30 PM							Consulting - Sydney
3:45 PM							Consulting - Sydney
4:00 PM							Consulting - Sydney
4:15 PM							Consulting - Sydney
4:30 PM							Consulting - Sydney

10

Scanned Documents

Learn how to view and manage **Scanned Documents** [here!](#)

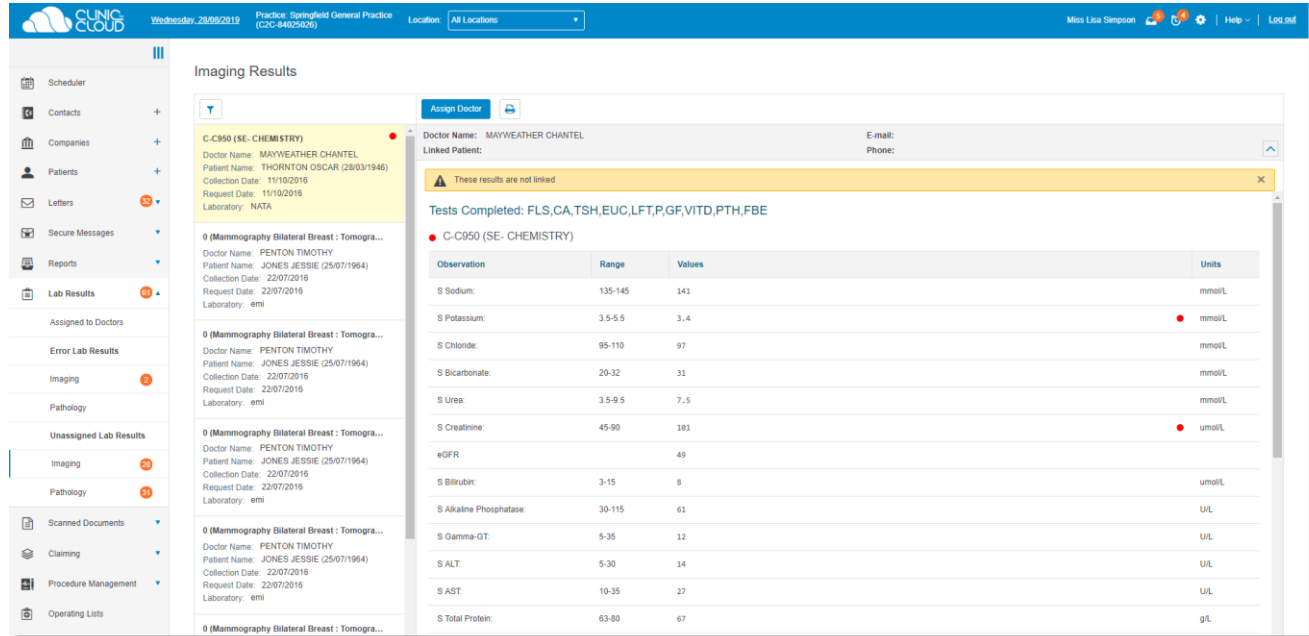


The screenshot shows the CLINIC CLOUD interface for a patient named Mr Homer (Homer) Sim. The top navigation bar includes the date (Wednesday, 28/05/2019), practice name (Springfield General Practice), location (All Locations), and user information (Dr Nick Rivers). The left sidebar contains various menu items, with 'Pathology' highlighted by a red arrow. The main content area displays a list of pathology requests and results. A red circle highlights the 'Results' tab in the 'Pathology' section. Below this, a table shows a list of pathology requests, with one entry for '0 (US Breast Bilateral) blood test' dated 17/09/2018. To the right of this list, a detailed view of the '0 (US BREAST BILATERAL)' result is shown, including observation, range, values, and units. The result text describes a breast ultrasound finding: 'Within the right breast at 10 o'clock, 5cm from the nipple there is a 7 x 12mm heterogeneous solid mass lesion identified with circumscribed margins and no posterior or acoustic shadowing. It is slightly larger in size compared to the prior examination and is more internally complex with areas of increased central echogenicity. No surrounding satellite nodularity is identified. The remainder of the breast parenchyma is normal in appearance bilaterally. No axillary lymphadenopathy is detected. Opinion:'. The 'Pathology' menu item in the sidebar is highlighted with a red arrow.

11

Lab Results

Learn how to manage Lab Results [here!](#)

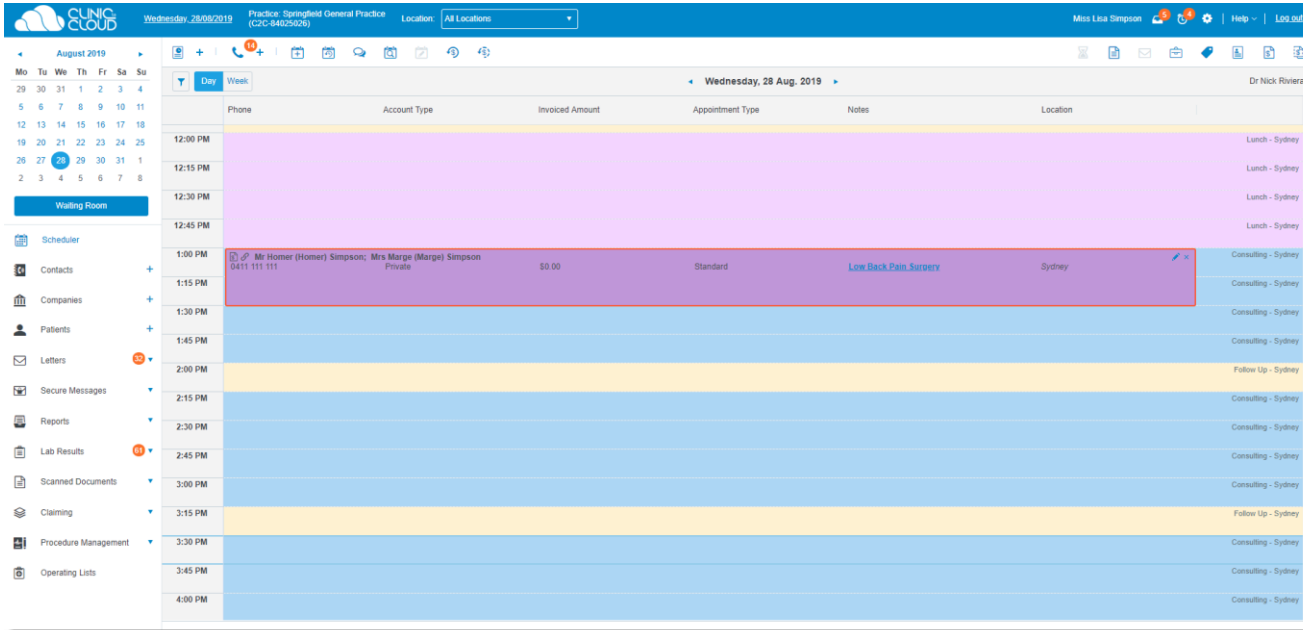


The screenshot shows the CLINIC CLOUD interface with the following components:

- Header:** Wednesday, 23/09/2019, Practice: Springfield General Practice (CIC-8402609), Location: All Locations, Miss Lisa Simpson, Help, Log out.
- Left Sidebar:** Scheduler, Contacts, Companies, Patients, Letters, Secure Messages, Reports, Lab Results (highlighted with a red arrow), Assigned to Doctors, Error Lab Results, Imaging, Pathology, Unassigned Lab Results, Scanned Documents, Claiming, Procedure Management, Operating Lists.
- Main Content Area:**
 - Imaging Results:**
 - Assign Doctor
 - Doctor Name: MAYWEATHER CHANTEL, E-mail: [redacted], Phone: [redacted]
 - Linked Patient: [redacted]
 - Warning: These results are not linked
 - Tests Completed: FLS,CA,TSH,EUC,LFT,P,GF,VITD,PTH,FBE
 - C-C950 (SE- CHEMISTRY)
 - Table with columns: Observation, Range, Values, Units.
 - C-C950 (SE- CHEMISTRY) (highlighted in yellow):
 - Doctor Name: MAYWEATHER CHANTEL
 - Patient Name: THORNTON OSCAR (28/03/1948)
 - Collection Date: 11/10/2016
 - Request Date: 11/10/2016
 - Laboratory: NATA
 - 0 (Mammography Bilateral Breast : Tomogra...):
 - Doctor Name: PENTON TIMOTHY
 - Patient Name: JONES JESSIE (25/07/1964)
 - Collection Date: 22/07/2016
 - Request Date: 22/07/2016
 - Laboratory: emi
 - 0 (Mammography Bilateral Breast : Tomogra...):
 - Doctor Name: PENTON TIMOTHY
 - Patient Name: JONES JESSIE (25/07/1964)
 - Collection Date: 22/07/2016
 - Request Date: 22/07/2016
 - Laboratory: emi
 - 0 (Mammography Bilateral Breast : Tomogra...):
 - Doctor Name: PENTON TIMOTHY
 - Patient Name: JONES JESSIE (25/07/1964)
 - Collection Date: 22/07/2016
 - Request Date: 22/07/2016
 - Laboratory: emi
 - 0 (Mammography Bilateral Breast : Tomogra...):
 - Doctor Name: PENTON TIMOTHY
 - Patient Name: JONES JESSIE (25/07/1964)
 - Collection Date: 22/07/2016
 - Request Date: 22/07/2016
 - Laboratory: emi
 - 0 (Mammography Bilateral Breast : Tomogra...):
 - Doctor Name: PENTON TIMOTHY
 - Patient Name: JONES JESSIE (25/07/1964)
 - Collection Date: 22/07/2016
 - Request Date: 22/07/2016
 - Laboratory: emi

Secure Messaging

Learn how to manage your **Secure Messages** [here](#) and **Link to your Contacts**!



Wednesday, 28/08/2019 Practice: Springfield General Practice (CPC: 94025256) Location: All Locations Miss Lisa Simpson Help | Log Out

August 2019

Mo Tu We Th Fr Sa Su

28 29 30 31 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31 1

2 3 4 5 6 7 8

Wailing Room

Scheduler

Contacts

Companies

Patients

Letters

Secure Messages

Reports

Lab Results

Scanned Documents

Claiming

Procedure Management

Operating Lists

Wednesday, 28 Aug. 2019 Dr Nick Riviera

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location	
12:00 PM							Lunch - Sydney
12:15 PM							Lunch - Sydney
12:30 PM							Lunch - Sydney
12:45 PM							Lunch - Sydney
1:00 PM	Mr Homer (Homer) Simpson; Mrs Marge (Marge) Simpson 9411 111 111	Private	\$0.00	Standard	Low Back Pain Surgery	Sydney	Consulting - Sydney
1:15 PM							Consulting - Sydney
1:30 PM							Consulting - Sydney
1:45 PM							Consulting - Sydney
2:00 PM							Follow Up - Sydney
2:15 PM							Consulting - Sydney
2:30 PM							Consulting - Sydney
2:45 PM							Consulting - Sydney
3:00 PM							Consulting - Sydney
3:15 PM							Follow Up - Sydney
3:30 PM							Consulting - Sydney
3:45 PM							Consulting - Sydney
4:00 PM							Consulting - Sydney

13

Help Centre

Find more in our **Help Centre** by [clicking here](#) and typing in a keyword in your search

How can we help?

SEARCH



ALERTS & UPDATES



KNOWLEDGE BASE



VIDEO TUTORIALS



RELEASE NOTES



THANK YOU

