

ADMIN TRAINING MANUAL

Content:

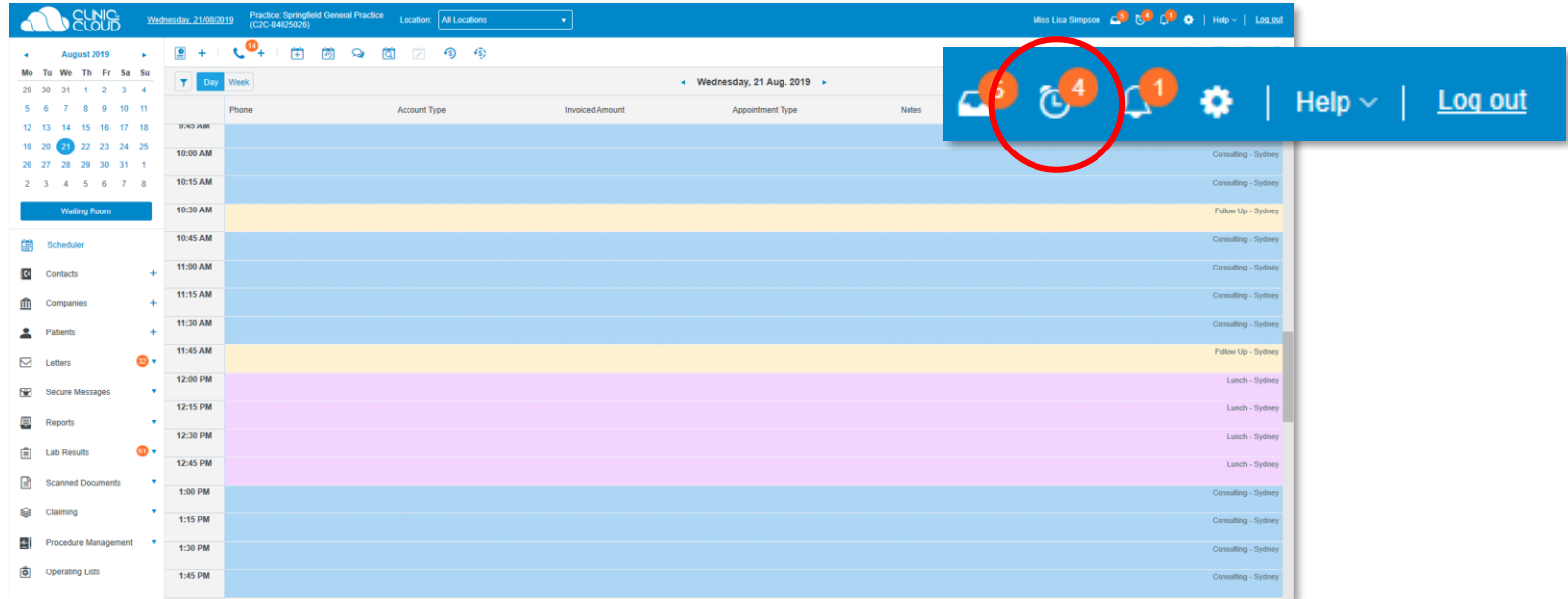
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1

eTasks

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

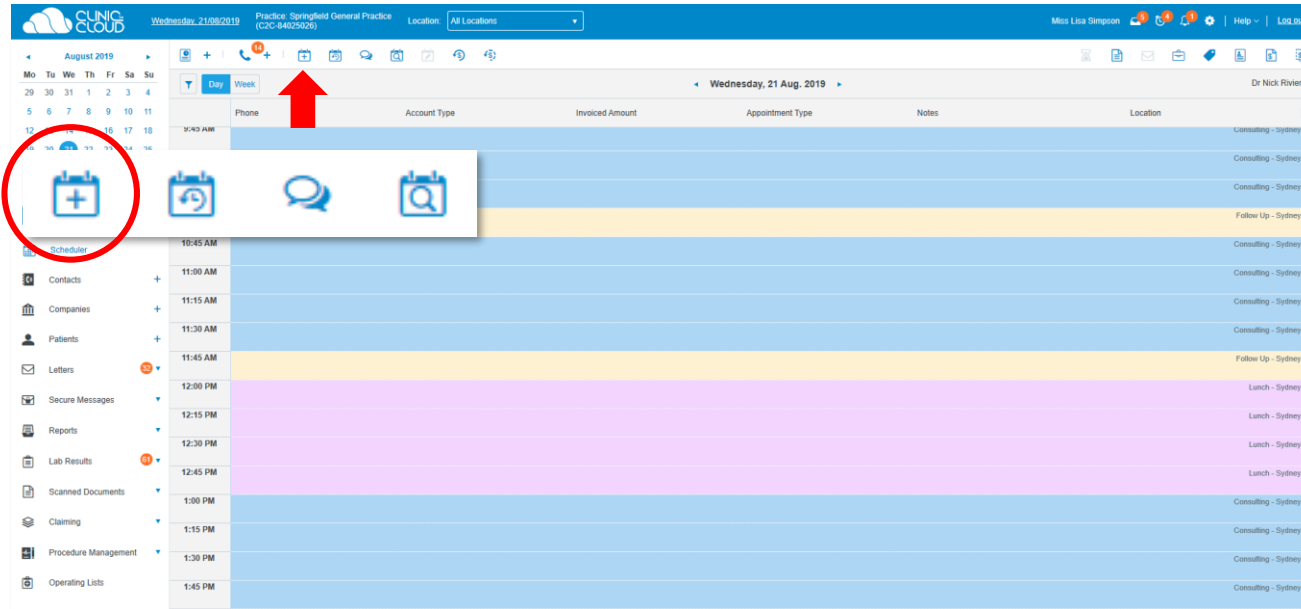



The screenshot displays the CLINIC CLOUD interface for a practice named 'Springfield General Practice'. The main view is a calendar for Wednesday, 21 Aug. 2019, showing a schedule of appointments from 10:00 AM to 1:45 PM. The appointments are categorized by type: 'Consulting - Sydney' (blue), 'Follow Up - Sydney' (yellow), and 'Lunch - Sydney' (purple). The top navigation bar is highlighted with a red circle and a red arrow pointing to it from above. The navigation bar contains icons for a calendar (5), a refresh/clock (4), a bell (1), a gear, 'Help', and 'Log out'.

2A

Booking Appointments

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

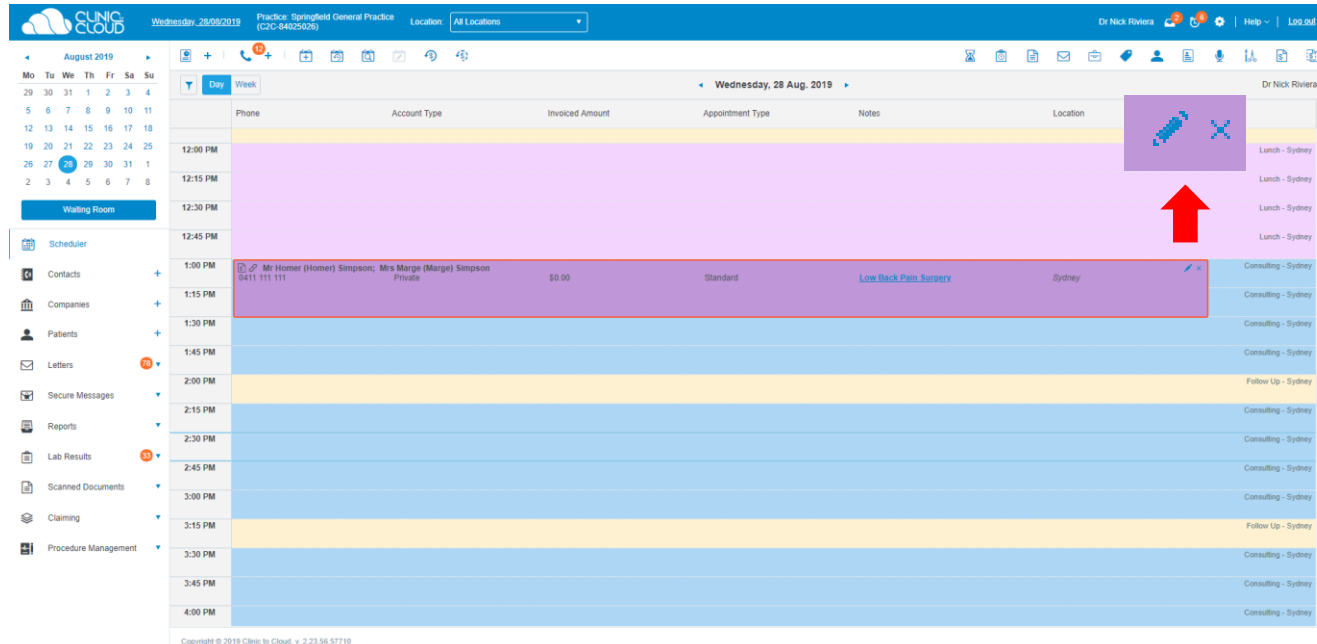


The screenshot displays the CLINIC CLOUD interface for 'Practice: Springfield General Practice (CZC-9482929)'. The top navigation bar includes the user name 'Miss Lisa Simpson' and a 'Load Out' option. The main area shows a calendar for 'Wednesday, 21 Aug. 2019' with a list of appointments. The appointment list has columns for 'Phone', 'Account Type', 'Invoiced Amount', 'Appointment Type', 'Notes', and 'Location'. The 'Appointment Type' column shows various appointment types such as 'Consulting - Sydney', 'Follow Up - Sydney', and 'Lunch - Sydney'. A red circle highlights the 'Add Appointment' icon (a calendar with a plus sign) in the top toolbar, and a red arrow points to it from the text above.


2B

Booking Appointments

Manually confirm/cancel appointment by clicking edit or cancel



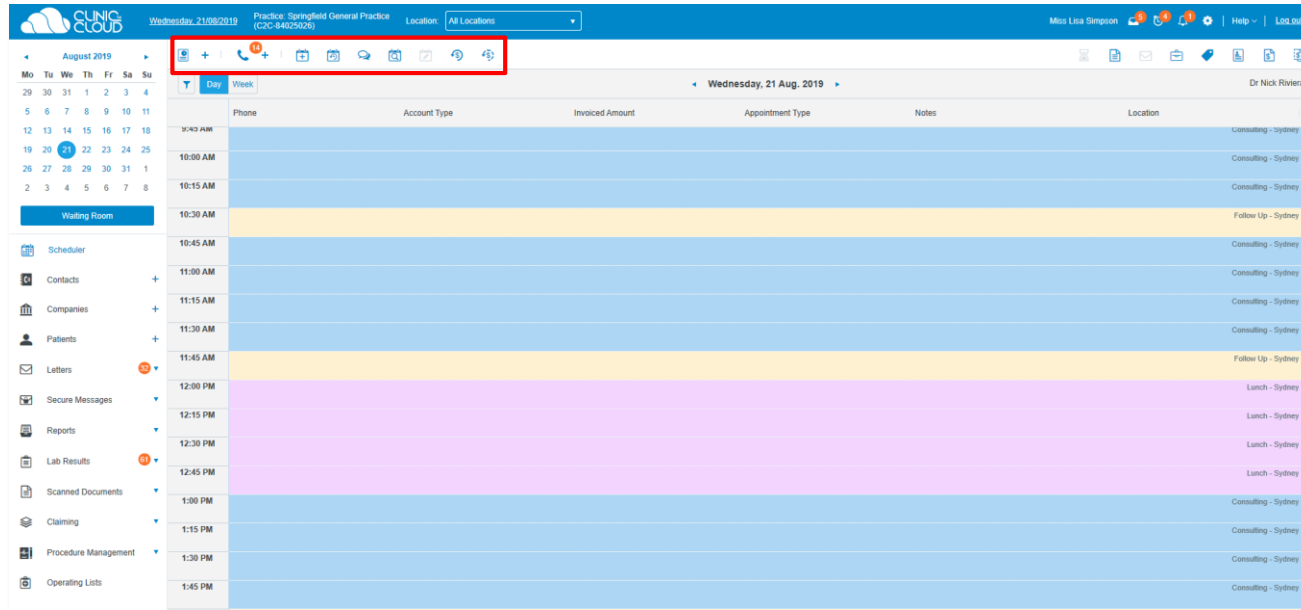
The screenshot displays the CLINIC CLOUD scheduler interface for Wednesday, 28 Aug. 2019. The interface includes a calendar view on the left, a navigation sidebar, and a main appointment grid. A red arrow points to an edit icon (a pencil) on a 1:00 PM appointment row.

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location	Actions
12:00 PM							
12:15 PM							
12:30 PM							
12:45 PM							
1:00 PM	Mr Homer (Homer) Simpson; Mrs Marge (Marge) Simpson 0411 111 111	Private	\$0.00	Standard	Low Back Pain Surgery	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							

2C

Booking Appointments

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



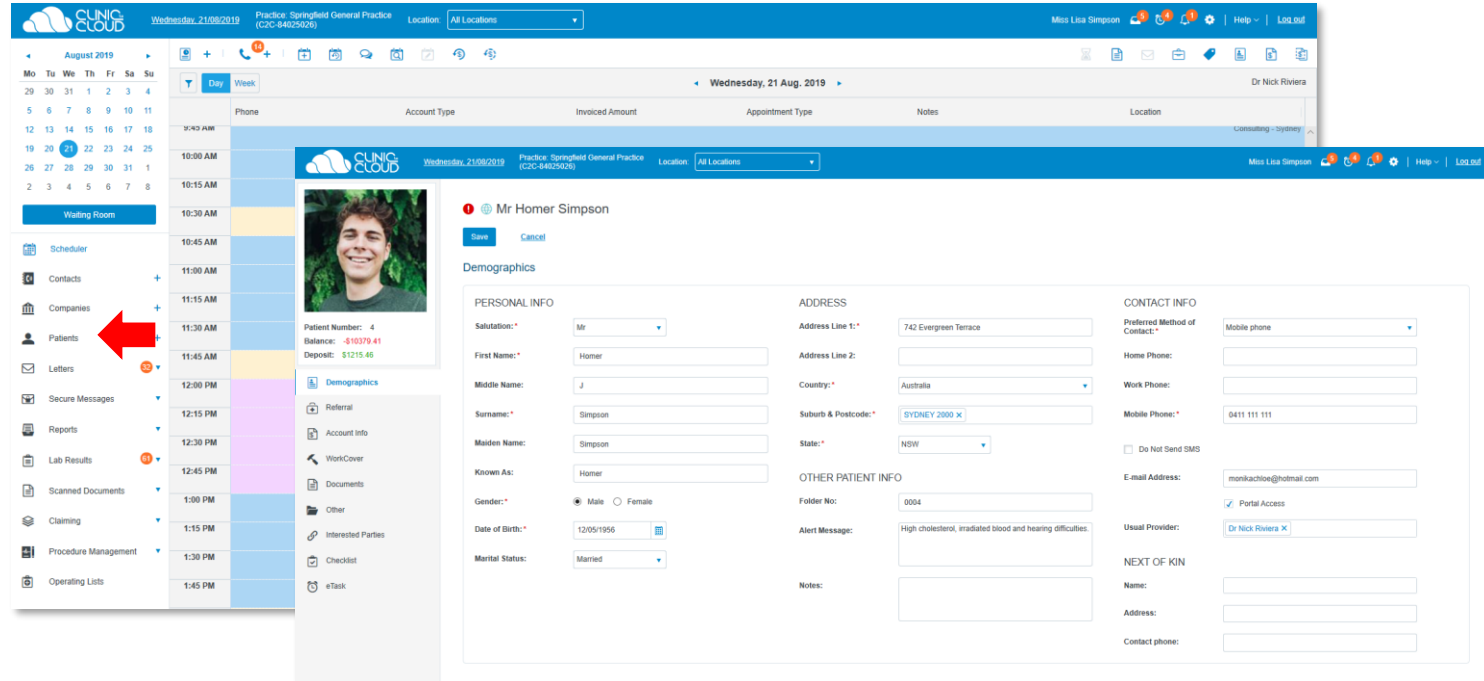
The screenshot displays the CLINIC CLOUD interface for Springfield General Practice (CZC-34625026). The top navigation bar includes the date (Wednesday, 21/08/2019), practice name, location (All Locations), and user information (Miss Lisa Simpson). A red box highlights the top navigation bar containing 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 on the left side of the appointment list.

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!**

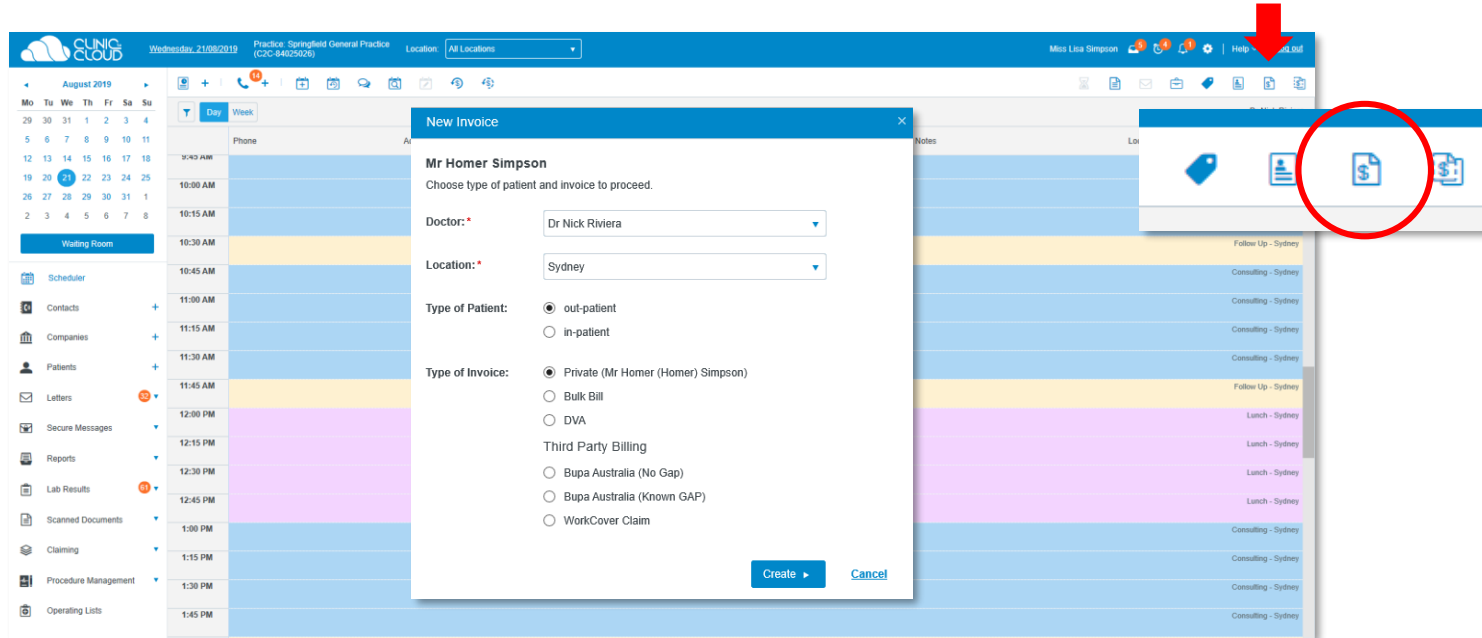


The screenshot displays the CLINIC CLOUD interface for a patient profile. At the top, the header shows the date (Wednesday, 21/08/2019), practice name (Springfield General Practice), and location (All Locations). A calendar on the left shows the current month (August 2019) with a red circle highlighting the 21st. A sidebar on the left contains navigation options: Scheduler, Contacts, Companies, Patients (highlighted with a red arrow), Letters, Secure Messages, Reports, Lab Results, Scanned Documents, Claiming, Procedure Management, and Operating Lists. The main content area shows a patient profile for Mr. Homer Simpson, including a photo, patient number (4), balance (-\$10379.43), and deposit (\$1215.46). The 'Demographics' section is expanded, showing fields for Personal Info (Salutation, First Name, Middle Name, Surname, Maiden Name, Known As, Gender, Date of Birth, Marital Status), Address (Address Line 1, Address Line 2, Country, Suburb & Postcode, State), Contact Info (Preferred Method of Contact, Home Phone, Work Phone, Mobile Phone, Do Not Send SMS, E-mail Address, Portal Access), Other Patient Info (Folder No, Alert Message), and Next of Kin (Name, Address, Contact phone).

4

Invoicing

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

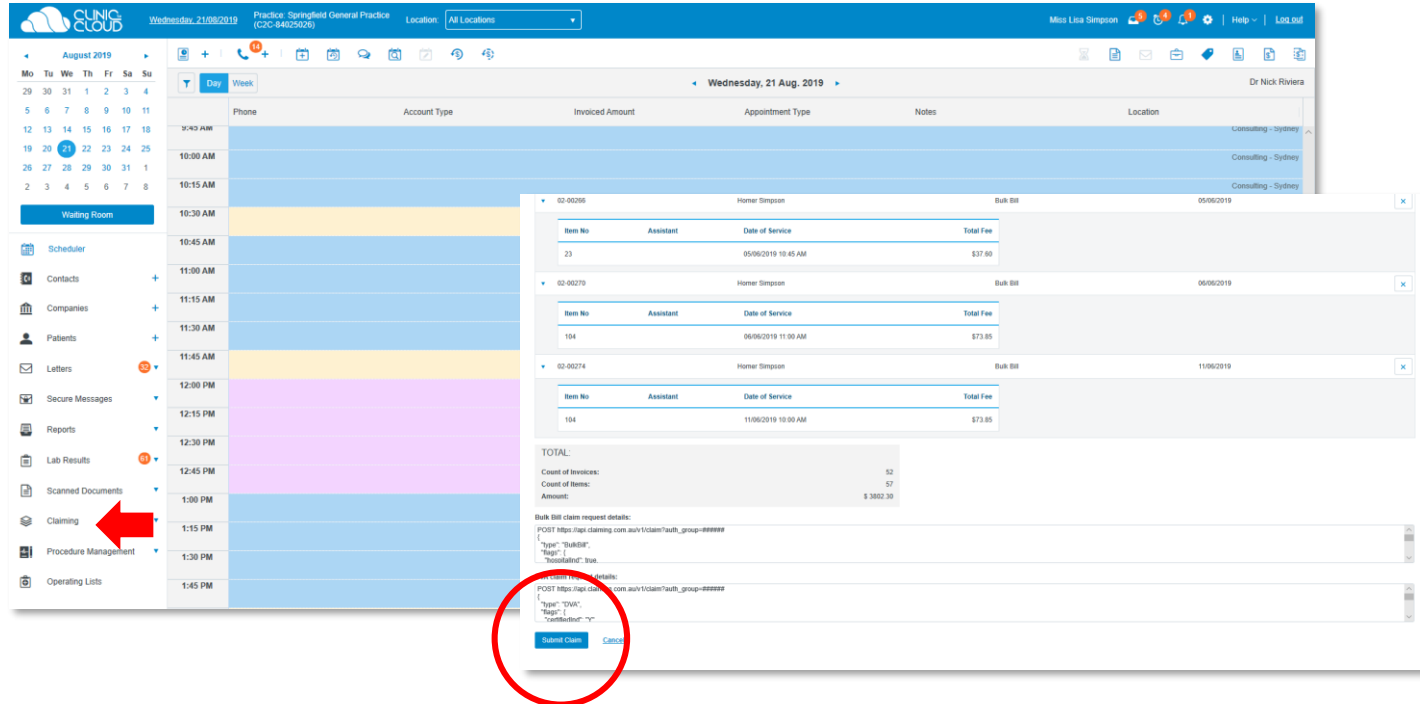


The screenshot displays the CLINIC CLOUD software interface. A 'New Invoice' dialog box is open in the center, titled 'New Invoice' with a close button (X). The patient name is 'Mr Homer Simpson'. Below the name, it says 'Choose type of patient and invoice to proceed.' The 'Doctor' field is set to 'Dr 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 'New Invoice' icon in the top right toolbar, and a red circle highlights the invoice-related icons in the bottom right toolbar.

5

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 (CZC-6402926) on Wednesday, 21/08/2019. The main view is a calendar for August 2019, with the 21st highlighted. A sidebar on the left contains navigation options: Scheduler, Contacts, Companies, Patients, Letters, Secure Messages, Reports, Lab Results, Scanned Documents, Claiming (highlighted with a red arrow), Procedure Management, and Operating Lists. A modal window titled 'Bulk Bill' is open, showing a list of items for submission:

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 items, a 'TOTAL' section shows:

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

The 'Bulk Bill claim request details' section contains the following information:

```

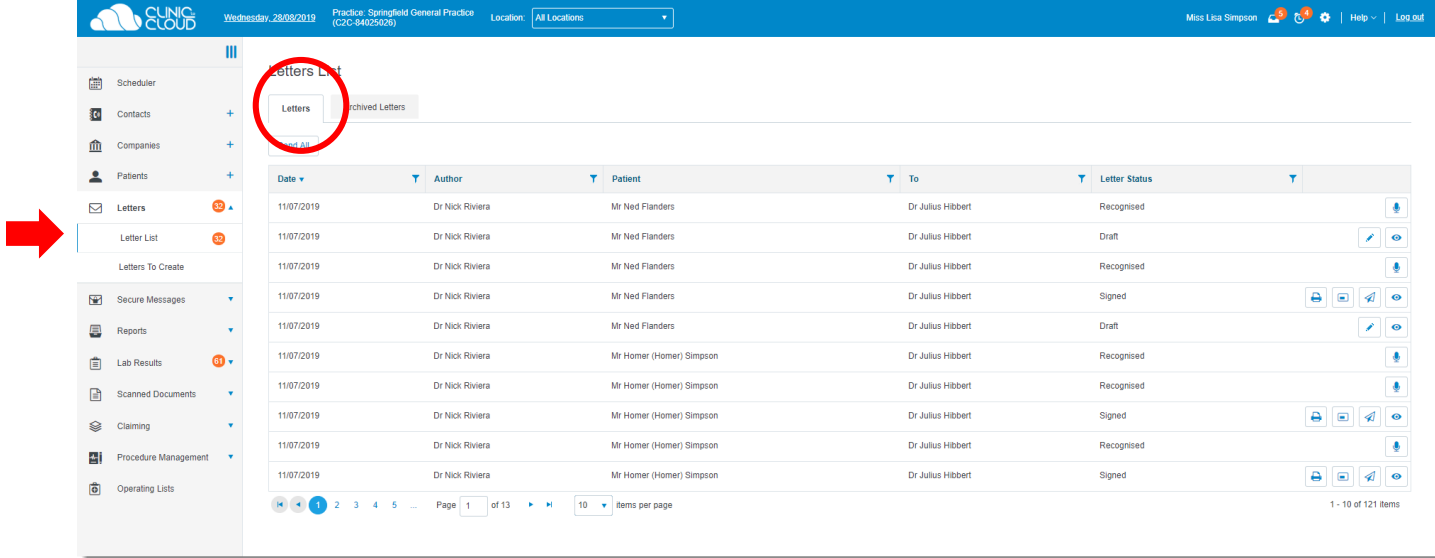
POST https://api.claiming.com.au/v1/claim/sub_group#####
{
  "type": "BulkBill",
  "flag": "E",
  "reschedule": true,
  "claim": {
    "type": "TWA",
    "flag": "E",
    "reschedule": "Y"
  }
}
  
```

At the bottom of the modal, there are 'Submit Claim' and 'Cancel' buttons. The 'Submit Claim' button is circled in red.

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', the practice name, location 'All Locations', and user information 'Miss Lisa Simpson'. The left sidebar contains various menu items, with 'Letter List' highlighted by a red arrow. The main content area shows the 'Letters List' tab selected, displaying a table of letters with columns for Date, Author, Patient, To, and Letter Status. A red circle highlights the 'Letters List' tab in the top navigation area.

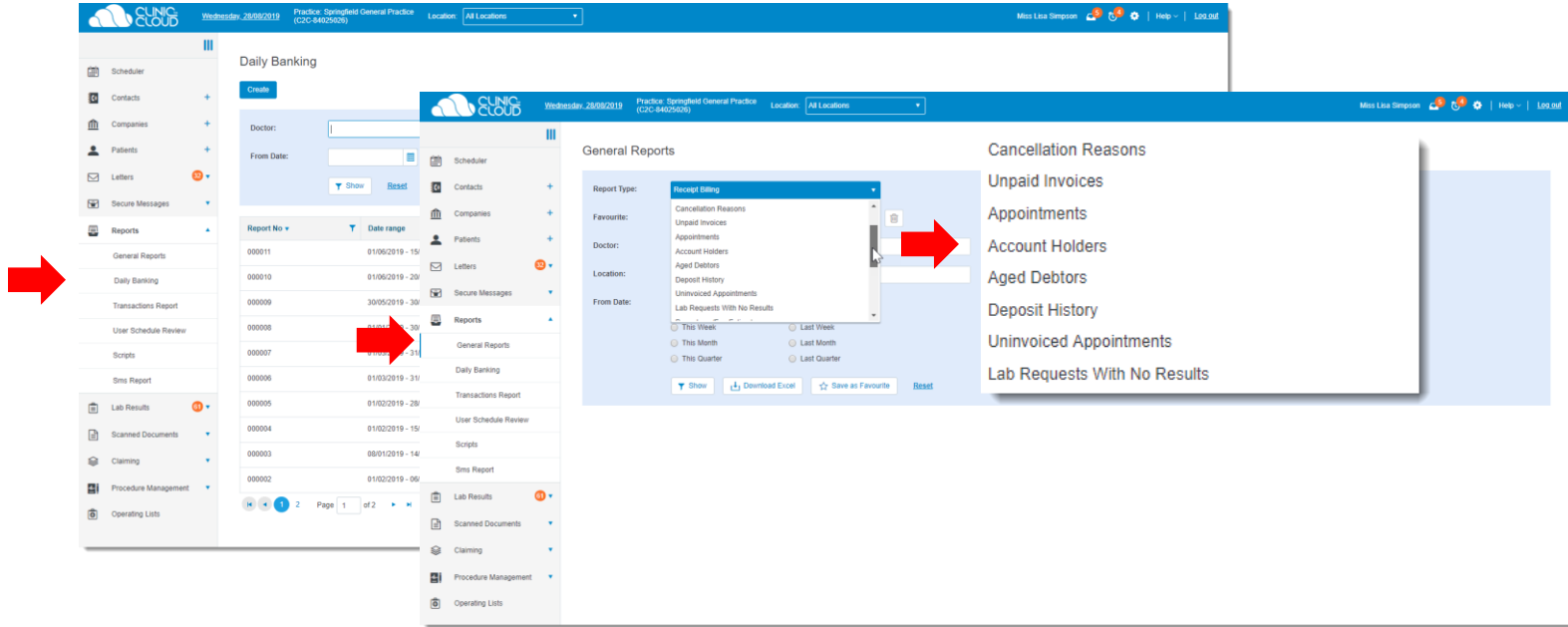
Date	Author	Patient	To	Letter Status
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius Hibbert	Recognised
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius Hibbert	Draft
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius Hibbert	Recognised
11/07/2019	Dr Nick Riviera	Mr Ned Flanders	Dr Julius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

Page 1 of 13 | 10 items per page | 1 - 10 of 121 items

7

Reports

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



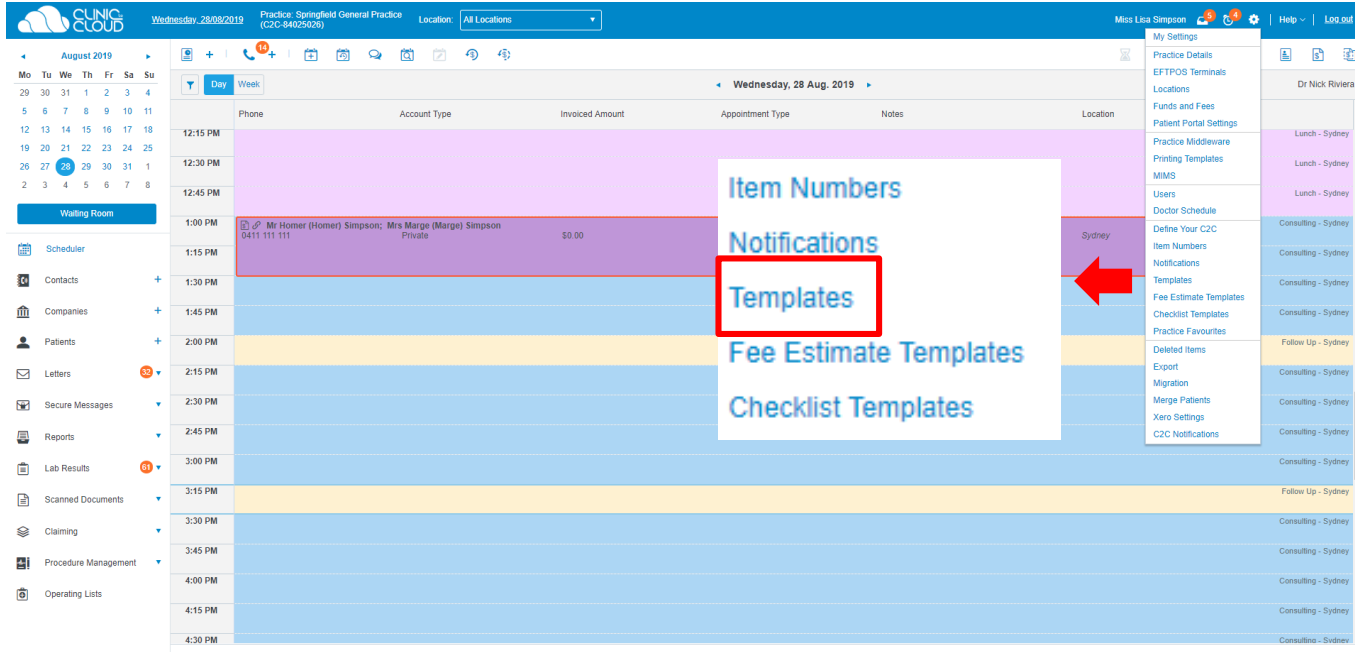
The screenshot displays the CLINIC CLOUD interface with the following elements:

- Header:** Clinic Cloud logo, Website: 26/08/2019, Practice: Springfield General Practice (CJC-84075628), Location: All Locations, User: Miss Lisa Simpson.
- Left Sidebar:**
 - Scheduler
 - Contacts
 - Companies
 - Patients
 - Letters
 - Secure Messages
 - Reports (highlighted with a red arrow)
 - General Reports
 - Daily Banking
 - Transactions Report
 - User Schedule Review
 - Scripts
 - Sms Report
 - Lab Results
 - Scanned Documents
 - Claiming
 - Procedure Management
 - Operating Lists
- Main Content Area:**
 - Daily Banking:** A table with columns 'Report No' and 'Date range'. A red arrow points to the 'Reports' menu item in the sidebar.
 - General Reports:** A dropdown menu showing 'Receipt Billing' as the selected report type. A red arrow points to this dropdown.
 - Report List:** A list of report types including:
 - Cancellation Reasons
 - Unpaid Invoices
 - Appointments
 - Account Holders
 - Aged Debtors
 - Deposit History
 - Uninvoiced Appointments
 - Lab Requests With No Results

8

Templates

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

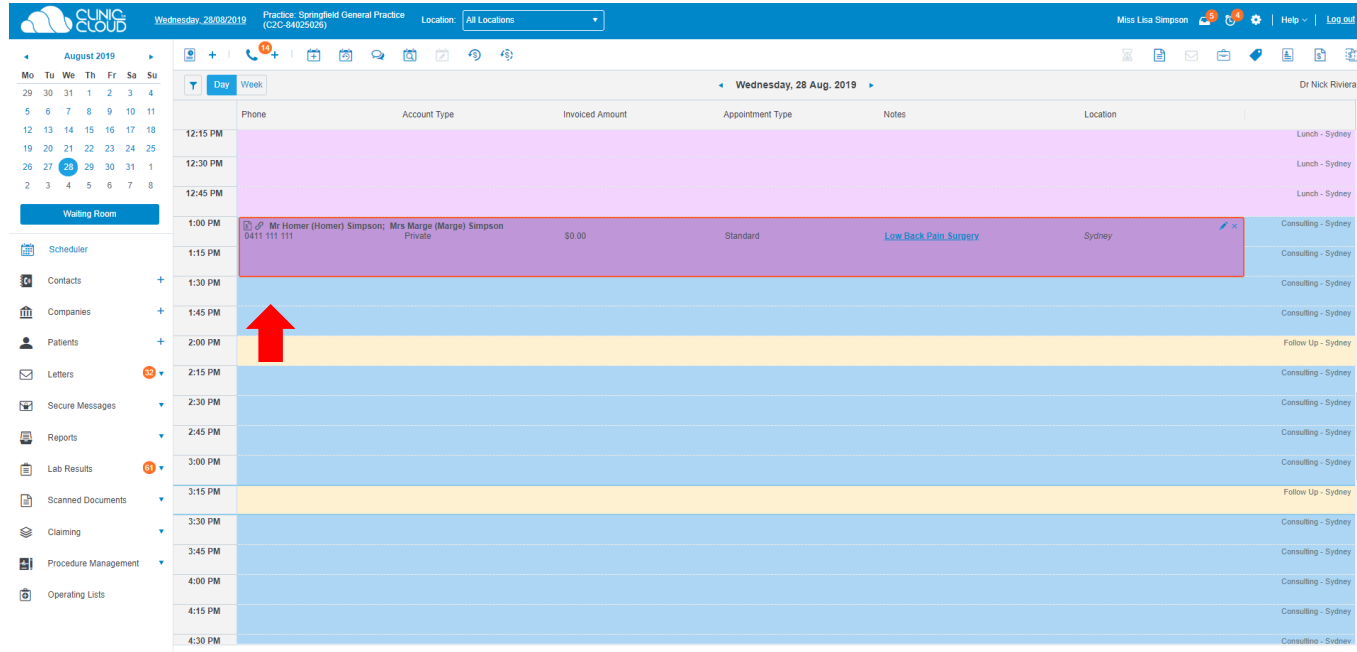


The screenshot shows the CLINIC CLOUD interface for Springfield General Practice (C2C-84025026) on Wednesday, 28/08/2019. The main area displays a calendar for August 2019 with a highlighted appointment for 1:00 PM. A sidebar on the left contains navigation options like Scheduler, Contacts, Companies, Patients, Letters, Reports, Lab Results, Scanned Documents, Claiming, Procedure Management, and Operating Lists. A right-hand sidebar shows 'My Settings' with a dropdown menu open, listing various settings such as Practice Details, EFTPOS Terminals, Locations, Funds and Fees, Patient Portal Settings, Practice Middleware, Printing Templates, MIMS, Users, Doctor Schedule, Define Your C2C, Item Numbers, Notifications, Templates, Fee Estimate Templates, Checklist Templates, Practice Favourites, Deleted Items, Export, Migration, Merge Patients, Xero Settings, and C2C Notifications. A red box highlights 'Templates' in the dropdown menu, with a red arrow pointing to it. A white callout box with a red border is overlaid on the calendar, listing 'Item Numbers', 'Notifications', 'Templates', 'Fee Estimate Templates', and 'Checklist Templates'.

9

Procedure Management

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



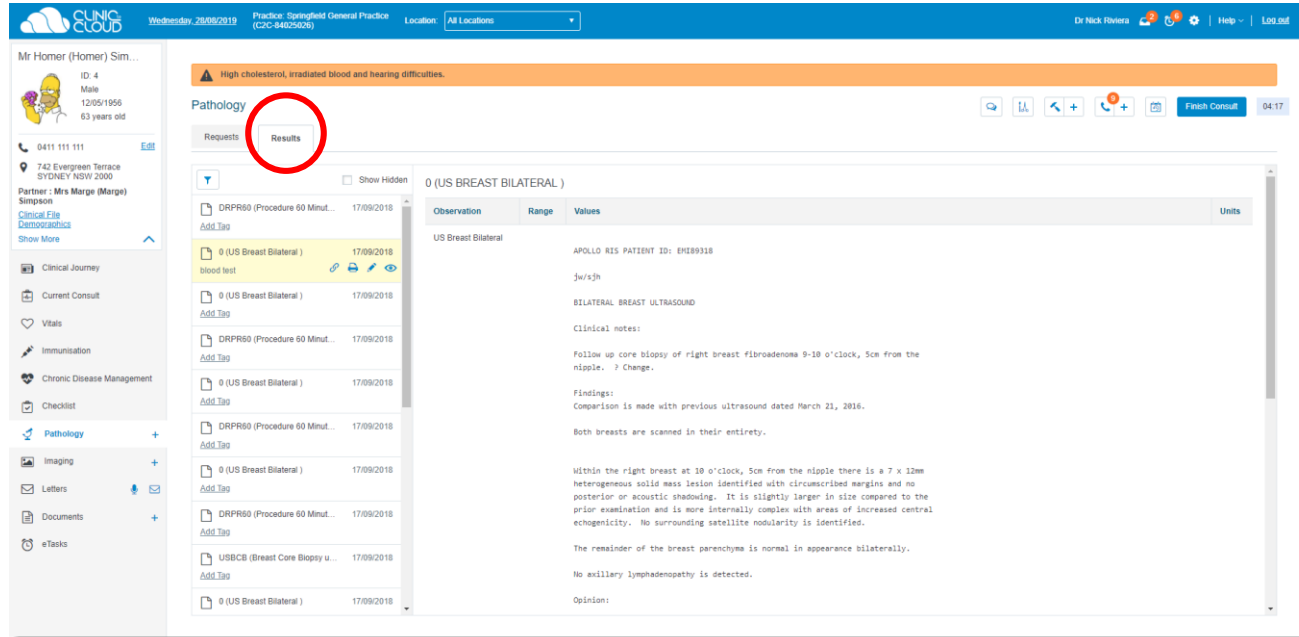
The screenshot displays the CLINIC CLOUD interface for 'Practice: Springfield General Practice (C2C-84025026)' on Wednesday, 28 Aug. 2019. The main area shows a calendar view with a table of appointments. A procedure for 'Mr Homer (Homer) Simpson; Mrs Marge (Marge) Simpson' is highlighted in purple, scheduled for 1:00 PM at 'Sydney' with the note 'Low Back Pain Surgery'. The table columns include Phone, Account Type, Invoiced Amount, Appointment Type, Notes, and Location. The left sidebar contains 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, and another red arrow points to the top right corner of the interface.

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location
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
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!](#)



CLINIC CLOUD Wednesday, 28/05/2019 Practice: Springfield General Practice (C2C-84825626) Location: All Locations Dr Nick Rivers Fetch Consult 04-17

Mr Homer (Homer) Sim...
 ID: 4
 Male
 12/05/1956
 63 years old
 0411 111 111
 742 Evergreen Terrace SYDNEY NSW 2000
 Partner: Mrs Marge (Marge) Simpson
 Clinical File Demographics Show More

Clinical Journey
 Current Consult
 Vitals
 Immunisation
 Chronic Disease Management
 Checklist
Pathology
 Imaging
 Letters
 Documents
 eTasks

High cholesterol, irradiated blood and hearing difficulties.

Pathology

Requests **Results**

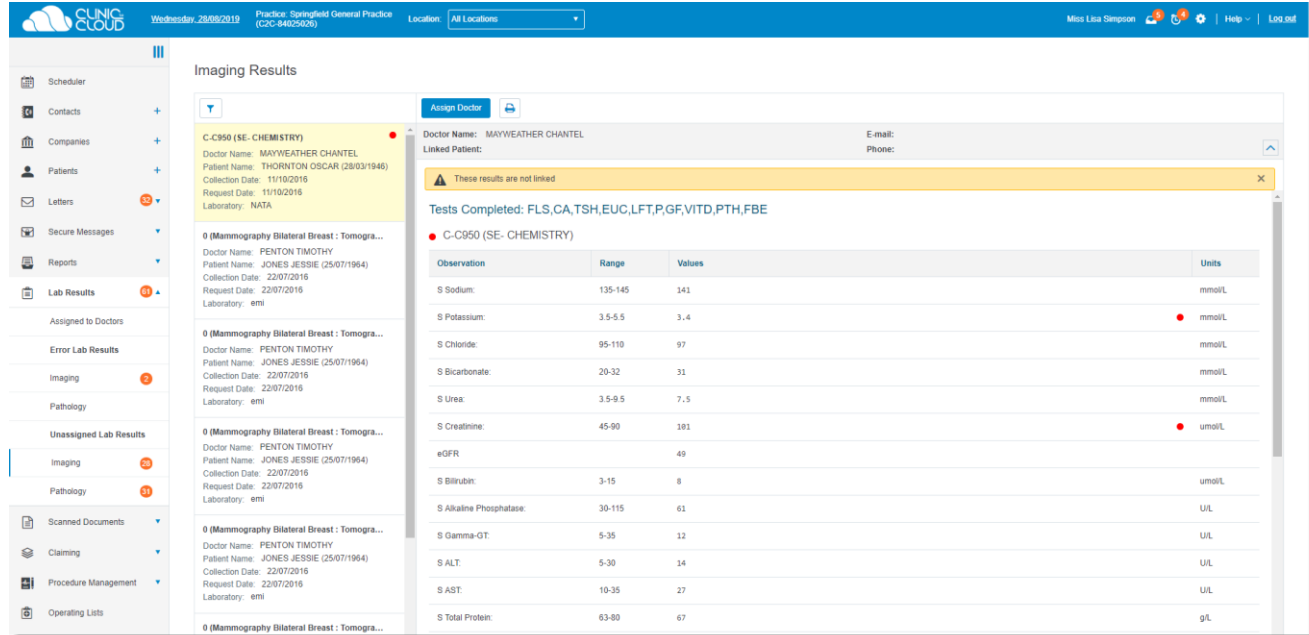
0 (US BREAST BILATERAL)

Observation	Range	Values	Units
US Breast Bilateral			
APOLLO RIS PATIENT ID: EM899318			
blood test		Jw/sJh	
BILATERAL BREAST ULTRASOUND			
Clinical notes:			
Follow up core biopsy of right breast fibroadenoma 9-10 o'clock, 5cm from the nipple. ? Change.			
Findings:			
Comparison is made with previous ultrasound dated March 21, 2016.			
Both breasts are scanned in their entirety.			
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:			

11

Lab Results

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



The screenshot displays the CLINIC CLOUD interface. At the top, the header shows the date (Wednesday, 23/09/2019), practice name (Springfield General Practice), and location (All Locations). The left sidebar contains a navigation menu with items like Scheduler, Contacts, Companies, Patients, Letters, Secure Messages, Reports, Lab Results (highlighted with a red arrow and a notification badge), Assigned to Doctors, Error Lab Results, Imaging, Pathology, Unassigned Lab Results, Scanned Documents, Claiming, Procedure Management, and Operating Lists. The main content area is titled 'Imaging Results' and shows a list of test results for a patient named JONES JESSIE (25/07/1964). The selected test is 'C-C950 (SE- CHEMISTRY)' with a red dot indicating a result. The results table shows various observations with their ranges and values, including S Sodium, S Potassium, S Chloride, S Bicarbonate, S Urea, S Creatinine, eGFR, S Bilirubin, S Alkaline Phosphatase, S Gamma-GT, S ALT, S AST, and S Total Protein. A yellow warning banner states 'These results are not linked'.

Imaging Results

Assign Doctor

C-C950 (SE- CHEMISTRY)

Doctor Name: MAYWEATHER CHANTEL
 Patient Name: THORNTON OSCAR (28/03/1948)
 Collection Date: 11/10/2016
 Request Date: 11/10/2016
 Laboratory: NATA

Doctor Name: MAYWEATHER CHANTEL
 E-mail:
 Linked Patient: Phone:

These results are not linked

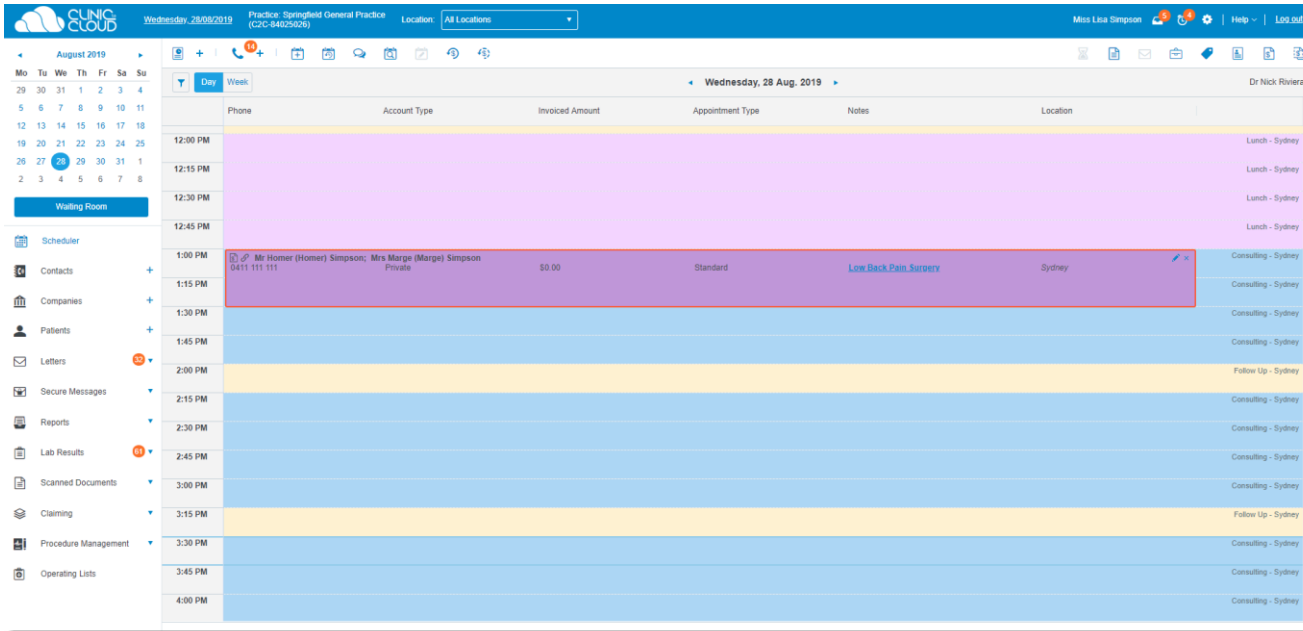
Tests Completed: FLS,CA,TSH,EUC,LFT,P,GF,VITD,PTH,FBE

C-C950 (SE- CHEMISTRY)

Observation	Range	Values	Units
S Sodium	135-145	141	mmol/L
S Potassium	3.5-5.5	3.4	mmol/L
S Chloride	95-110	97	mmol/L
S Bicarbonate	20-32	31	mmol/L
S Urea	3.5-9.5	7.5	mmol/L
S Creatinine	45-90	101	umol/L
eGFR		49	
S Bilirubin	3-15	8	umol/L
S Alkaline Phosphatase	30-115	61	U/L
S Gamma-GT	5-35	12	U/L
S ALT	5-30	14	U/L
S AST	10-35	27	U/L
S Total Protein	63-80	67	g/L

Secure Messaging

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



The screenshot displays the CLINIC CLOUD interface for a practice named 'Springfield General Practice'. The main area shows a calendar for Wednesday, 28 Aug 2019, with a list of appointments. A red arrow points to the 'Secure Messages' option in the left-hand navigation menu.

Time	Phone	Account Type	Invoiced Amount	Appointment Type	Notes	Location	Activity
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

