Practice checklists

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The following checklists are a guide for **Practice Managers.** The downloadable MS Word version may be edited to suit operational requirements and includes a tickbox checklist.

Download this guide in MS Word format: Practice checklist.docx

Daily checklist

Tasks performed by the end of each day.

Office

Check appointments have been billed Guide

1. Run Attendance report
2. Confirm all appointments have been billed

Submit suppressed BB/DVA claims Guide

1. In the Claims tab, view Suppressed claims
2. Select Transmit Claims

Reconcile Claim payments Guide

1. Set filters in the Payments tab and Reconcile Payments
2. Check for and action rejections in the Claims tab

Check daily Messages Guide

1. Open Message Manager and check SMS messages
2. Review Status. Use filters to check Queued and Failed

Clinical

Check Results Inbox Guide

1. Open Results Inbox
2. Check results are assigned to a patient and doctor

Banking

Depending on throughput and workflows the following can be conducted **daily, weekly or monthly**. End of business day or after last appointment is appropriate, regardless of the interval.

Close the Session (if in use) Guide

1. For each Banklist - balance Session and resolve any errors
2. Close the Session

Closing the Batch Guide

1. For each Banklist - balance Batch and resolve any errors
2. Close the Batch/banking

Weekly checklist

Office

Check expiring referrals Guide

1. Run the referrals expiring report
2. SMS patients to advise of expired referral

Check AIR

1. Open AIR and review Claim Status (Pending and Errored)
2. Resolve transmission errors

Clinical

My Health Record Uploads Guide

1. Run the Tracking of My Health Record Uploads report
2. Review number of Event and Shared Health Summaries uploaded

Monthly checklist

Office

Check MBS / Health Fund Fee Files

1. Login to Client Portal to download Fee Schedules
2. Update fees in Practice Setup > Items

Check SMS Credits

1. In Utilities select SMS Tools
2. Log into Message Manager to top up

Disable inactive Users Guide

1. Review Zedmed Security Roles and Users
2. Set departed staff to Inactive

Clinical

Review Patients without Allergy information

1. Run Report called Patients Missing Allergy Info Report
2. Provide information to practitioners

Financial Reports checklist

Ensure Claims are transmitted and reconciled to produce up to date financial reporting data.

1. **Debtors Report** – identify and action outstanding payments
2. **Unallocated Credit report** – part of the Debtors Report, review regularly and action the unallocated credits
3. **Transaction GST Report** – based on date action was performed in Zedmed (activity date)
   - Provide daily or weekly to practitioners to show **Receipts**
   - Run **Summary** weekly or monthly to view totals for the practice
   - Use *Group By* and *Order By* filters to match invoices and payments based on service date
4. **Banking Reports**
   - **Batch Report** – show payments grouped into Payment Type and useful for practitioners to compare with Tyro
   - **Reconciliation Report** – summary totals for closed batches, ideal for viewing income for practice monthly, bi-annually or annually/financial year

Discretionary tasks

Unavailability Schedule Guide

- Record public holidays and practice closures
- Record practitioner unavailability