

Admin cheat sheet

Set it up once, then keep an eye on the money.

- 1 Where things live**
Sign in to the Dashboard. The Practice section at the bottom of the menu holds the admin tools.
- 2 Practice Details**
Name, address, phone, email and letterhead logo appear on every invoice, statement and reminder. Save Details, check the preview.
- 3 Staff and roles**
User Management, Add User. Roles are Admin, Doctor, Receptionist. When someone leaves, deactivate, do not delete, so history stays.
- 4 Services and prices**
Add Service with a name and price. A new price only affects new invoices. Old invoices keep their price.
- 5 Insurers, companies, referrers**
Insurance Companies are picked on patient records. Companies are employers who pay for staff. Referring Doctors shows who sends you patients.
- 6 Commission**
Commission Settings: click a rate, type the new number, Save All Changes. A change only applies to later payments.
- 7 Reports**
Reports: pick a month, Generate Report. Profit and Loss shows income, commission cost and what is left. Past months do not move when a rate changes.
- 8 Company bills**
Company Bills, Raise a bill: pick company and dates, Show visits, untick any that should wait, Raise bill.
- 9 Claim packs and tablets**
Claim pack builds an insurer PDF from an invoice. Every download is logged. Intake Tablets pairs a waiting room tablet. Submissions go to Intake Review.
- 10 Audit Log**
Records who exported, emailed, changed or removed what, newest first. Filter by action. Review it now and then.

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