

FOR RECEPTION, BILLING AND HEALTHCARE MANAGEMENT TEAMS

Billing & Appointment Management

**Clearer patient schedules.
Connected billing records.**

Organise appointment bookings, waiting status, service charges, invoices and payment records around the same patient journey.



Reception and billing illustration from the Medoho product page.

RECEPTION

Bookings and waiting status in a connected daily workflow.

BILLING TEAMS

Service charges, invoices and associated payment records.

MANAGEMENT

Recorded billing activity and operational visibility.

UNDERSTAND THE MODULE

What does this module do?

Appointment management organises bookings and patient schedules. Billing management connects service charges, invoices and payment records with the patient workflow.

One journey from booking to billing

Medoho brings scheduling and billing information together, helping reception, care teams and billing staff coordinate the work before, during and after the visit.

WHAT YOU CAN WORK WITH

Appointment bookings

Manage appointment bookings in the connected patient workflow, with the relevant patient and doctor information.

Daily schedules and waiting status

Review appointments, daily schedules and waiting status so reception and care teams can coordinate the day.

Follow-up coordination

Connect follow-up work and the next appointment with the patient record, supporting an organised return visit.

Service charges

Keep applicable consultation, hospital, laboratory, pharmacy and other service charges connected to the patient.

Invoice management

Manage invoices with the relevant patient and billed services, creating an organised reference for the billing team.

Payment records

Process and maintain payment records through the available billing workflow. Confirm supported methods during setup.

Bills and patient history

Keep bills with patient history and make shared billing documents available through the configured patient workflow.

Operational review

Use available billing reports, staff permissions and configured branch views to review recorded activity.

Available modules, charge categories, payment methods, reports and access depend on the selected plan and configuration.

APPOINTMENTS AND THE DAILY SCHEDULE

Organise the day at reception.

Give reception and the care team a shared reference for bookings and patient progress.

SCENARIO 01 / APPOINTMENT BOOKINGS

Bookings are spread across a diary, calls and messages.

THE PROBLEM

Reception notes phone bookings in a diary while another staff member keeps a separate list. The team has to compare entries to understand the doctor schedule and confirm the patient booking.

HOW MEDOHO HELPS

Manage appointment bookings in the connected schedule with the relevant patient and doctor information. Reception can review the recorded appointments when organising the day and confirming the next booking.

What your team gains: A central appointment reference helps staff coordinate bookings with less checking across separate lists.

SCENARIO 02 / WAITING STATUS

Reception keeps asking which patient is ready for consultation.

THE PROBLEM

Patients arrive, but their waiting status is handled verbally. Reception and the care team repeatedly ask which patients are waiting and which are ready for consultation.

HOW MEDOHO HELPS

Use the available appointment and waiting status workflow with the daily schedule. Keep status information maintained by the relevant staff so reception and care teams can review the recorded patient progress.

What your team gains: Recorded waiting status gives the team a clearer reference for coordinating the next patient handover.

Reception gets: organised appointment records, the daily schedule and a shared view of recorded waiting status.

FOLLOW-UPS AND SERVICE CHARGES

Connect the next action.

Carry follow-up work and charge information forward from the relevant patient record.

SCENARIO 03 / FOLLOW-UP APPOINTMENTS

Follow-up advice is given, but the return visit is not organised.

THE PROBLEM

The doctor advises a follow-up during consultation. Reception has to find the instruction again or ask the patient what was advised before coordinating the next appointment.

HOW MEDOHO HELPS

Keep follow-up information connected to the patient and visit record. Use the available follow-up and appointment workflow to review the next action and organise the return booking with the relevant doctor.

What your team gains: Reception has a clearer reference for arranging the next visit from the recorded follow-up information.

SCENARIO 04 / CONNECTED SERVICE CHARGES

Patient charges are scattered across department records.

THE PROBLEM

Consultation, laboratory, pharmacy or inpatient services are recorded in separate places. Billing staff collect slips and ask departments for details before bringing the relevant patient charges together.

HOW MEDOHO HELPS

Connect applicable service charges to the patient workflow. With the relevant modules enabled, organise doctor, bed, nursing, laboratory, pharmacy and other recorded charges around the patient and care episode.

What your team gains: Billing staff can review connected service-charge information before preparing the relevant invoice.

Care and billing teams get: recorded follow-up context and connected charges from the relevant enabled modules.

INVOICES AND PAYMENT RECORDS

Keep billing information clear.

Organise the invoice and the associated payment activity around the relevant patient.

SCENARIO 05 / INVOICE MANAGEMENT

A bill is prepared without clear service context.

THE PROBLEM

The billing desk relies on a handwritten total or separate charge notes. When the patient asks what the bill covers, staff have to search again for the relevant service details.

HOW MEDOHO HELPS

Manage invoices using the patient and recorded service-charge information in the billing workflow. Keep the relevant billed services organised so staff have a clearer reference when explaining the invoice.

What your team gains: An organised invoice record helps the billing team explain the relevant billed services to the patient.

SCENARIO 06 / PAYMENT RECORDS

Payment is collected, but the entry sits outside the bill record.

THE PROBLEM

A staff member notes a collected payment in a separate register. At the next enquiry, the billing team compares that register with the invoice to understand the associated payment activity.

HOW MEDOHO HELPS

Process and maintain payment records through the available billing workflow. Keep the relevant payment entry associated with the invoice, with supported methods and recording responsibilities confirmed for the selected setup.

What your team gains: Associated invoice and payment records give staff a clearer reference when reviewing the transaction.

Billing team gets: invoice management and connected payment records for the relevant patient workflow.

BILLING HISTORY AND MANAGEMENT REVIEW

Make billing records easier to find.

Retain the patient billing context and give management a more organised operational view.

SCENARIO 07 / PREVIOUS BILLS AND DOCUMENTS

A returning patient needs a copy of an earlier bill.

THE PROBLEM

The patient has lost the printed bill. Staff search folders and separate files to find the document, then confirm which earlier visit or admission it belongs to.

HOW MEDOHO HELPS

Keep bills with patient history so authorised staff can find the relevant billing documents alongside the patient record. Use the configured document-sharing workflow when making bills available to the patient.

What your team gains: Relevant earlier bills stay connected to the patient record for authorised retrieval and sharing.

SCENARIO 08 / OPERATIONAL REPORTING

Daily billing activity is reviewed from multiple registers.

THE PROBLEM

Appointment and billing records are maintained in separate lists. The owner or manager asks staff for totals and updates before reviewing activity across the clinic, hospital or branches.

HOW MEDOHO HELPS

Use available appointment and billing operational views, reports and configured branch visibility to review recorded activity. Keep the review based on the information maintained in the connected workflow.

What your team gains: Management gets a more organised reference for reviewing appointment and billing activity across relevant locations.

Management gets: billing documents linked to patient history and available operational reporting.

THE EVERYDAY WORKFLOW

From booking to billing history.

An illustrative journey connecting the patient schedule, visit charges and billing records.

01

Find the patient and organise the booking

Register or locate the patient, then manage the relevant doctor appointment in the connected schedule.

02

Coordinate arrival and waiting status

Maintain the appointment and waiting information used by reception and the care team during the visit.

03

Connect services and the next action

Keep relevant service charges and follow-up information associated with the patient and care episode.

04

Prepare the relevant invoice

Review recorded charges from the enabled modules and manage the invoice with the patient context.

05

Maintain the payment record

Record the associated payment activity using the supported workflow and methods agreed for your setup.

06

Retain bills and review operations

Keep bills with patient history and use available operational reports to review recorded appointment and billing activity.

A connected view of the patient visit

Bookings, service charges, invoices and payment records stay linked to the patient workflow.

FOR YOUR RECEPTION AND BILLING TEAM

Connect scheduling and billing.

For clinics, multi-doctor practices and hospitals coordinating reception, patient services and billing.

YOUR BILLING AND APPOINTMENT TOOLKIT

Appointment bookings; daily schedules and waiting status; follow-up coordination; connected service charges; invoice management; payment records; bills with patient history; configured patient document sharing; staff permissions; and operational review.

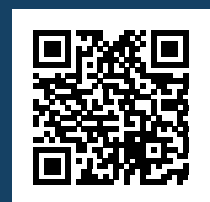
PLAN YOUR SETUP

- 01 Map your scheduling workflow** - Identify doctors, appointment bookings, waiting status and return-visit handovers.
- 02 Agree the charge categories** - Confirm consultation, hospital, lab, pharmacy and other charges for the enabled modules.
- 03 Confirm invoice and payment handling** - Agree the invoice format, supported payment methods and staff recording responsibilities.
- 04 Define staff access and document sharing** - Set reception, billing and admin responsibilities, and confirm patient bill access.
- 05 Walk through a complete patient journey** - Check booking, waiting status, charges, invoice, payment record and earlier bill retrieval.

See Medoho in your daily workflow.

Book a 30-minute demonstration.

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Module availability, invoice formats, payment methods, integrations, migration, training and support are agreed for the selected setup. This guide describes the workflow; it does not define commercial package inclusions.