

# Surgical Partners User Guide

## How to Close a Fee Run

Version	Date	Revised Section	Reason	Author Position	Approver
1.0	25/07/2025	All	First release	Ops	CPO

1.	Document Control .....	2
2.	Prerequisite to Close a Fee Run .....	2
3.	Closing the Fee run.....	2
4.	ABA file .....	9
5.	Accessing the Documents .....	10
6.	Surgical Partners Knowledge Base .....	10

## 1. Document Control

<b>Name</b>	Surgical Partners User Guide How to Close a Fee Run
<b>Version Number</b>	1.0
<b>Owner</b>	SM
<b>Last Review Date</b>	25/07/2025
<b>Approver</b>	CPO

## 2. Prerequisite to Close a Fee Run

To close the fee run,

- The user must have a login to Surgical Partners with a minimum role as a clerk or higher.
- Fee run period should have ended.

## 3. Closing the Fee run

To close a fee run, you need to follow these steps

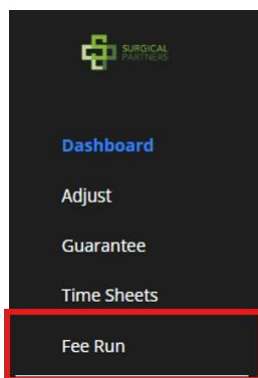
### 3.1. Login to Surgical Partners

Log in to Surgical Partners Enterprise using your credentials.

URL to login: [Surgical Partners Health Hub](#)

### 3.2. Fee Run Tab

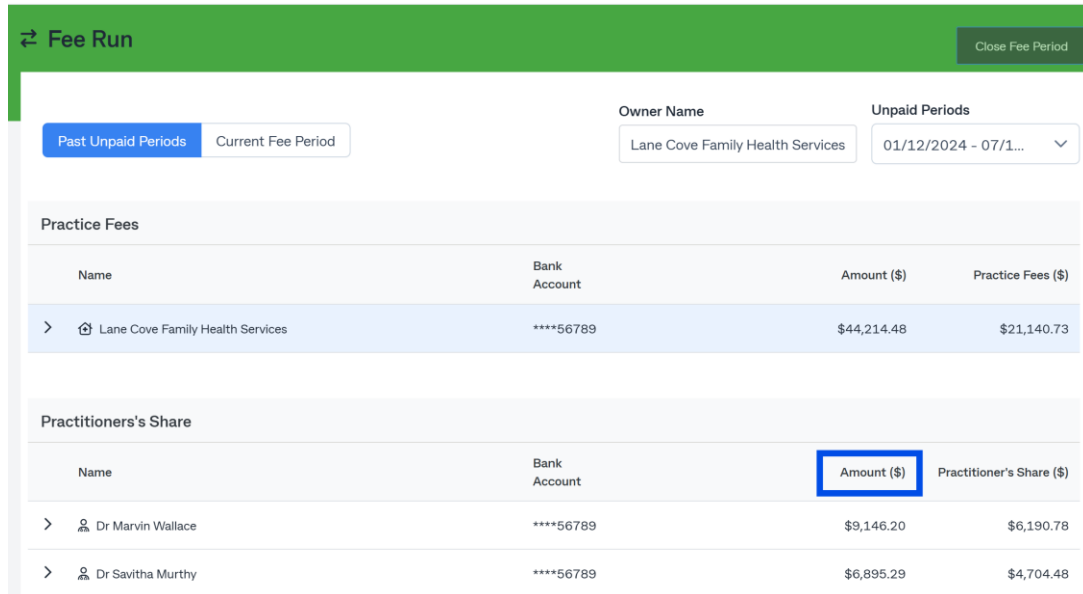
Click the Fee Run tab on the left side bar. You will land on the **“Past Unpaid Period”** which we are planning to close and the **“Close Fee Period”** button is available on the top right corner.



### 3.3. Data Validation

Download the BP Reports for the fee period. Make sure that the fee run period amounts match the Reports from the “Fee run” Tab in Surgical Partners.

**Note:** The “Close Fee Period” will be available only if all the past unpaid periods are closed.



**Fee Run** Close Fee Period

Past Unpaid Periods Current Fee Period

Owner Name: Lane Cove Family Health Services

Unpaid Periods: 01/12/2024 - 07/1...

**Practice Fees**

Name	Bank Account	Amount (\$)	Practice Fees (\$)
> Lane Cove Family Health Services	****56789	\$44,214.48	\$21,140.73

**Practitioners's Share**

Name	Bank Account	Amount (\$)	Practitioner's Share (\$)
> Dr Marvin Wallace	****56789	\$9,146.20	\$6,190.78
> Dr Savitha Murthy	****56789	\$6,895.29	\$4,704.48

### Reports needed when data validating:

For **Best Practice** Management System which the DRM Basis for calculation for practitioners is:

#### Receipts

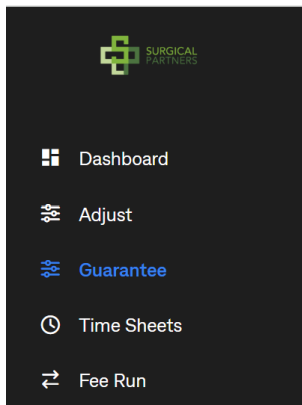
- Payment Export Report for the fee run period
- Payments by Account Type Grouped by Payment Created Date (including related services) for the fee run period

#### Billings

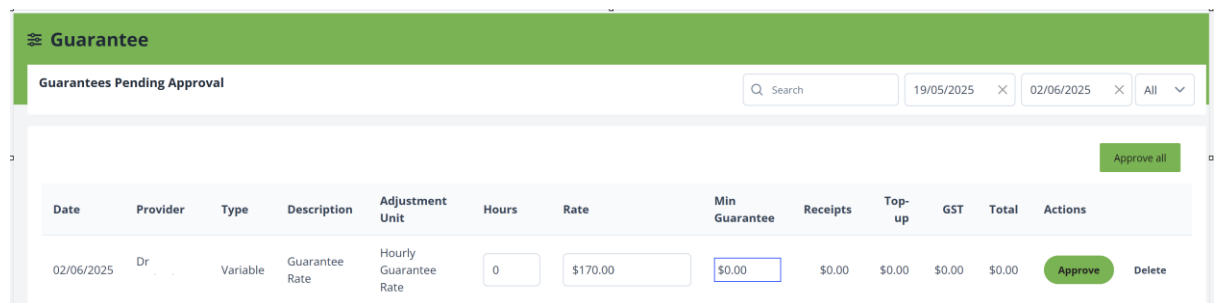
- Service Export Report for the fee run period
- Services by Account Type (Grouped by Service Created Date) for the fee run period

### 3.4. Entering the Guarantees

Once total amount match, if there are any doctor set up with guarantees, please click on the “Guarantee” tab in the Surgical Partners Menu. If not go to **step 3.7**.



Choose the date range filter. Make the end date as the current date. This will list all the doctors on guarantees



Date	Provider	Type	Description	Adjustment Unit	Hours	Rate	Min Guarantee	Receipts	Top-up	GST	Total	Actions
02/06/2025	Dr	Variable	Guarantee Rate	Hourly Guarantee Rate	0	\$170.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Approve Delete

Now, click on the “**Hours**” field next to the doctors to add in the hour’s details via timesheets for each doctor. The confirmation box below appears.

**Confirmation required**
×

You will now be redirected to Timesheets page.  
Enter hours/rate on Timesheet page and navigate back to this page to approve guarantee, do you want proceed?

✗ No
✓ Yes

Click on “**Yes**”. This will re-direct you to the Timesheets page pointing to the right fee run on the top right corner of the page.

### 3.5. Filling the timesheets

On the Timesheets, all the days will be listed for the fee period. Enter the below details

**Location** – Choose the practice location from the dropdown menu

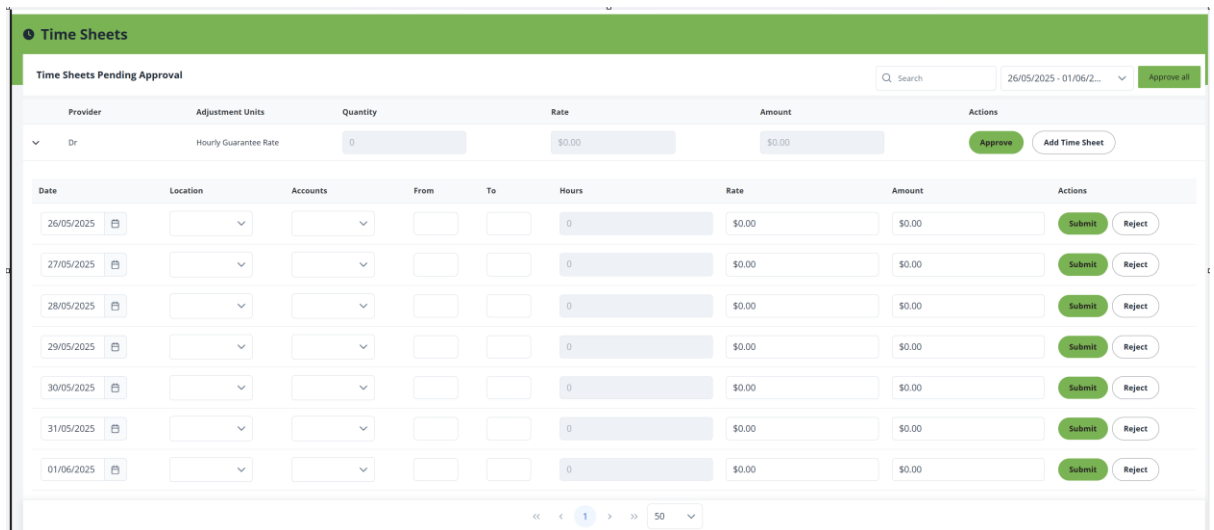
**Accounts** – To match to the right account

**From & To:** Start and end time of Dr’s work hours (Eg : 09.00 to 17.00)

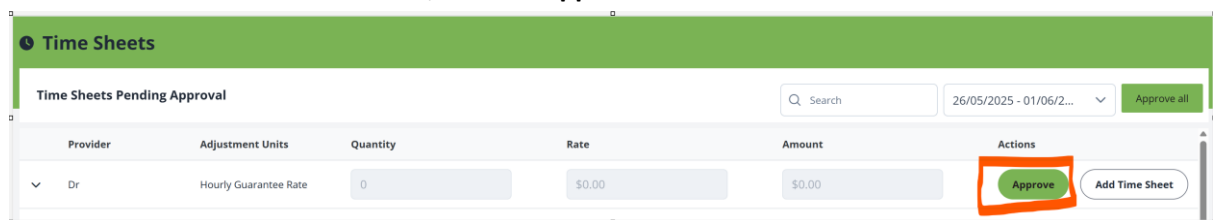
**Rate:** Fill in the hourly rate (Eg: \$175)

**Amount:** Will be automatically calculated.

Click on **Submit** button next to each day once all details are filled in. If the doctor has not worked on a day. Click on the **Reject** button next to the timesheet.



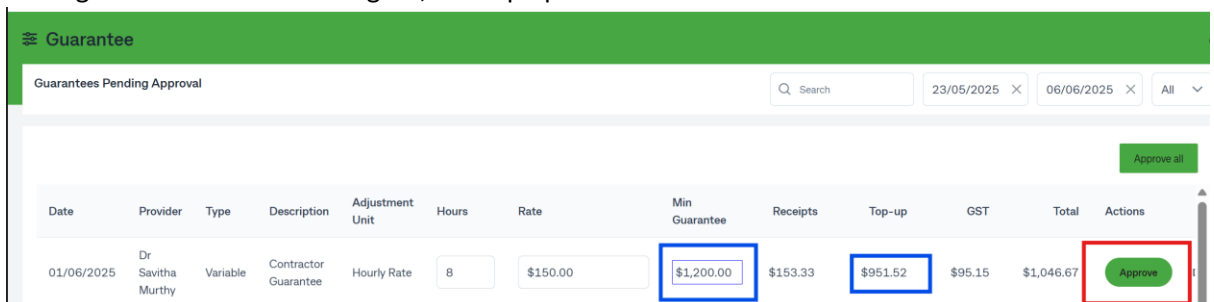
Once all the time sheets are filled in, Click on **Approve** button



### 3.6. Approving the Guarantees

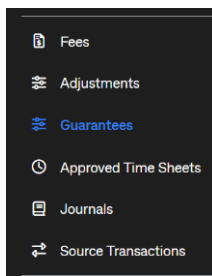
Once the Timesheets are approved, go back to the Guarantee Tab, you can now see the calculated Guarantee, total share from the Service Fee and indicating whichever is higher.

If the guaranteed amount is higher, the top up amount is added to the doctor's share.



If the percentage is higher, the system indicates the same amount in the fee run.

Click **“Approve”** to approve all the guaranteed amount. Once approved, the details can be seen in the **“Guarantees”** Tab on the Menu bar.



Guarantees													
<div> <input type="text" value="Search"/> <input type="text" value="From date"/> <input type="text" value="To date"/> <input type="button" value="All"/> </div>													
Created Date	Provider	Type	Description	Adjustment Units	Qty	Rate	Min Guarantee	Comparator	Top-up	GST	Discount	Total	Status
01/06/2025	Dr Savitha Murthy	Variable	Contractor Guarantee	Hourly Rate	8	\$150.00	\$1,200.00	\$153.33	\$951.52	\$95.15	\$0.00	\$1,046.67	COMPLETED <a href="#">Details</a>

On the Fee run, we can see the Top up amount added if any after the guarantees are approved.

Fee Run

Close Fee Period

Paid Unpaid Periods

Current Fee Period

Owner Name

Unpaid Periods

PRADINGTON GOLD PTY LIMITED

25/05/2025 - 31/05/2025

Practice Fees

Name	Bank Account	Amount (\$)	Practice Fees (\$)
> @ PRADINGTON GOLD PTY LIMITED	****52741	\$40,575.26	\$26,049.96

Practitioner's Share

Name	Bank Account	Amount (\$)	Practitioner's Share (\$)
> Dr Savitha Murthy	****5678	\$1,257.97	\$211.30

Disbursements

Date	Amount (\$)	Practitioner's Share (\$)
> 25/05/2025	\$211.30	\$153.33
> 27/05/2025	\$0.00	\$0.00
> 31/05/2025	\$1,046.67	\$1,046.67

Adjustments

Date	Type	Description	Has GST	Amount (\$)	
31/05/2025	Payment	Contractor Guarantee	Yes	\$1,046.67	Details

### 3.7. Generating a Report in Surgical Partners

There are many reports available in Surgical Partners for validation of the service fee calculations. Payments Report is best suitable for the same

- Go to the **"Reports"** Tab
- Choose the **"Payment report"** from the drop-down menu
- Choose the date range for the fee period.
- Click on **"Generate Report"**
- Click on the **"Details"** to see the service fee calculations for each doctor.

Report Data

Back

			Receipt			Practice			Provider		
HPII	Bill To	Doctor Type	Amount	GST	Total	Amount	GST	Total	Amount	GST	Total
8003614907633166	Dr Savitha Murthy	Customer	\$39.20	\$0.00	\$39.20	\$9.80	\$0.98	\$10.78	\$28.42	\$0.00	\$28.42
			Receipt			Practice			Provider		
Description	Contract	Amount	GST	Total	Amount	GST	Total	Amount	GST	Total	
Telehealth	25.00%	\$39.20	\$0.00	\$39.20	\$9.80	\$0.98	\$10.78	\$28.42	\$0.00	\$28.42	

For detailed information about the individual transactions, we recommend the **“Detailed Report by Payment Created Date”** Report for receipts-based calculations and **“Detailed report by Service Created Date”** for billings-based calculations.

### 3.8. Adjustments

In case of any adjustments either payment/receipt need to be made to the provider, this can be added to the SP platform through the **Adjust** option on the main menu. If no adjustments required, go to step **3.9**.

Any adjustment to be added, the prototype needs to be defined in the settings > Adjustments section either being it a one off one or a recurring one. The amount defined there is an estimated one, which can be overridden while adding the actual adjustments.

Go to Settings > Adjustments > Click on New Payment Setting  
 Define the type here (**Payment Type or Receipt Type**)  
 Click “Add Payment”  
 If it’s a recurring Adjustment , click the check box next to its label.

Add Payment Settings

Name\*

Supervision Payments

Account\*

Purchases

Amount\*

1,500.00

GST\*

GST Exempt

☐ Advance Payment
 ☐ Recurring adjustment

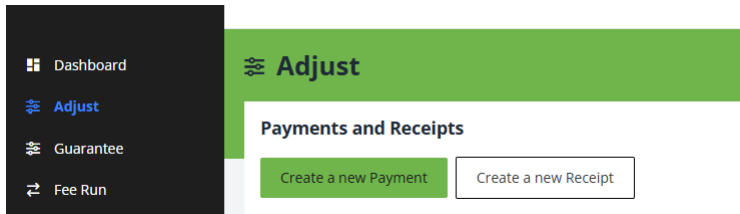
Add Payment

Once defined, the system saves the details as below.

**Adjustment Payment (AP)**
[+ New Payment Settings](#)

Name	Account Name	Type	Adjustment Unit	Start Date	Frequency	GST	Amount
Supervision Payments	Purchases	Non-Recurring	-	--	--	GST Exempt	\$1500 ***

In order add the actual adjustment, now go to the **“Adjust”** Menu > Click on **“Create a new Payment”**



Fill in the relevant details for the below and click on **Create Payment**.

Create a Payment

×

Provider

Dr Savitha Murthy - 5348763Y

Adjustment Type

Supervision Payments (GST Exempt) ▾

Unpaid Periods

20/07/2025 - 26/07/2025 ▾

Amount\* ⓘ

\$1,500.00

Description

Supervision payment for June month.

Cancel

Create Payment

- Provider
- Adjustment type from the dropdown menu
- Fee period
- The amount needed to be changed.

Once the payment adjustment is created, this can be seen in the **“Adjustments”** menu.

Adjustments

Q Search

14/07/2025 ×

28/07/2025 ×

All ▾

Created Date	Provider	Type	Description	Account Name	Account Number	Status	Amount(\$)
28/07/2025	Dr Savitha Murthy	Payment	Supervision payment for June month.	Purchases	429	COMPLETED	\$1,500.00 <a href="#">Details</a>

<< < 1 > >>

50 ▾

These adjustments are then added to the providers in the fee run period under the last day of the period.

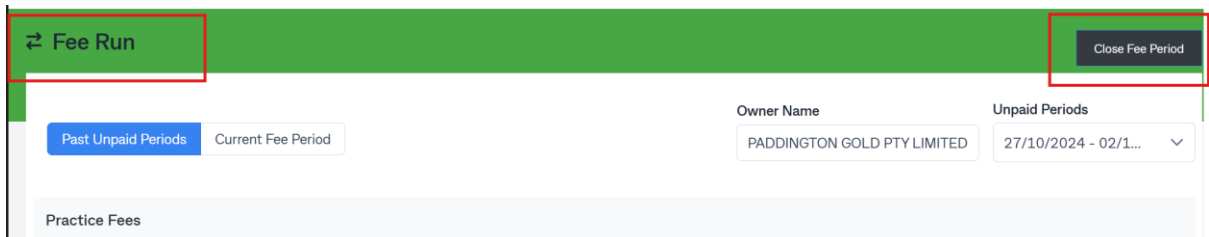


Adjustments					
Date	Type	Description	Has GST	Amount (\$)	
26/07/2025	Payment	Supervision payment for June month.	No	\$1,500.00	<a href="#">Details</a>

Similarly, the **Receivable** Adjustments can be added to the providers if needed.

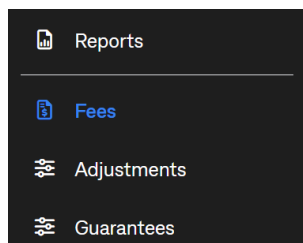
### 3.9. Clicking the Close Period Button

To close the fee run, go to the **“Fee run”** Tab, go to the right fee period, click on the **“Close Fee Period”** button.




## 4. ABA file

After closing the fee run, your ABA file will be available in the **“Fees”** Tab in the Surgical Partners Menu.



Choose the right **Paid Periods** from the top right corner. Click on the **ABA file** to download the file and it can be uploaded into your online banking portal to pay the doctors.


**Fees**

ABA File 


Owner Name

Paid Periods

PADDINGTON GOLD PTY LIMITED

20/10/2024 - 26/10/20... 

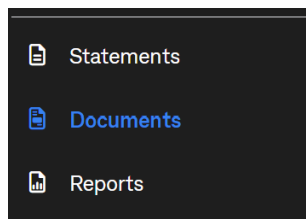
Practice Fees

Name	Bank Account	Amount (\$)	Practice Fees (\$)
>  PADDINGTON GOLD PTY LIMITED	****52741	\$51,811.37	\$21,847.72

## 5. Accessing the Documents

Once the fee run is closed, the Invoices and Activity summary will be automatically sent to the nominated email address of practitioners.

You can also view the Invoices in the Surgical Partners Hub by clicking the **“Documents”** tab on the left sidebar.




Alternatively, you can also download the invoices and activity summary advices by clicking on the PDF icon next to the respective documents.


**Documents**







Owner Name

PADDINGTON GOLD PTY LIMITED

Invoices 

10/2024

All 

Issuer	Recipient	From Date	To Date	Type	Synced	Email Status	Download
Paddington Family Health Services	Dr Savitha Murthy	20/10/2024	26/10/2024	Tax			
Paddington Family Health Services	Dr Adrian James	20/10/2024	26/10/2024	Tax			

Documents

Owner Name

PADDINGTON GOLD PTY LIMITED

Search

Activity Summary

10/2024

Invoices

Remittance Advices

Activity Summary

Issuer	Recipient	From Date	To Date		Download
Paddington Family Health Services	Debora	20/10/2024	26/10/2024		
Paddington Family Health Services	Mikah	20/10/2024	26/10/2024	SENT	

## 6. Surgical Partners Knowledge Base

<https://learn.surgicalpartners.com.au/viper-learning>