

AutoMed (AMS) Banned Guide Settings

This guide will take you through how to use the *Banned Settings* and *Outstanding Debt - Online Booking Validation* in the AutoMed Dashboard.

Ban Level options

There are two ban levels which can be assigned to Patients:

Important: You need to create the **Level 1** or **Level 2** Pop-Up Message.

Please use the below templates or create your own. (**Page 2** will show you how to create the template)

| Level 1 | Level 1 Message Example |
|--|--|
| Bans Patients from making appointments online | Dear Patient, online appointments are not available to you at this time, kindly contact us directly on <Clinic Phone Number> so that our reception can assist you with booking an appointment |
| Level 2 | Level 2 Message Example |
| Lets Patients know you are unable to accommodate them at your practice | Dear Patient, we are not able to accommodate you at our practice at this time. Kindly consult https://www.healthdirect.gov.au for alternate practices in the area. |

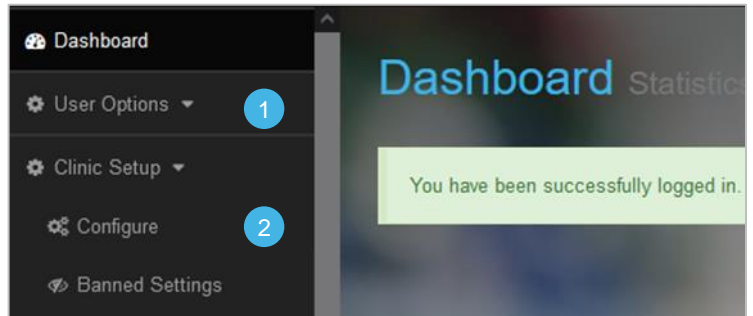
Access Banned Settings

To access **Banned Settings**.

In your Dashboard:

1. Click **Clinic Setup**
2. Select **Banned Settings**

You'll be taken to the **Banned Setting** Screen.



Banned Settings

In the Banned Settings, you'll be able to:

- Manage the **Pop-up Templates** which are sent to Patients
- **Remove** a Patient's banned status
- **Ban** a patient using the **Level 1** or **Level 2** option
- **Search** Patients in the existing banned list

| Banned Settings | | | | |
|--|----------------|---|--|---|
| <input type="text" value="Search Patients"/> | | <input type="button" value="Manage Templates"/> | <input type="button" value="+ Add Patient"/> | |
| Patient ID | Patient Name | Patient DOB | Banned Level | |
| 428 | Hendrik Putter | 30-03-1978 | Level 2 | <input type="button" value="Remove Ban"/> |
| 479 | Hendrik Putter | 30-03-2001 | Level 2 | <input type="button" value="Remove Ban"/> |
| 492 | Hendrik Putter | 01-01-2020 | Level 2 | <input type="button" value="Remove Ban"/> |
| 825 | Jenni Putter | 08-12-2004 | Level 1 | <input type="button" value="Remove Ban"/> |

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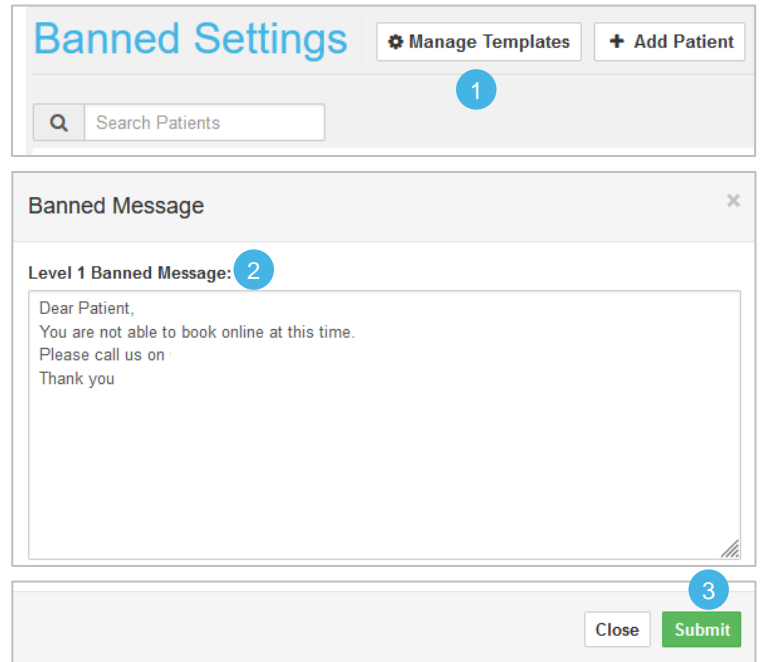
Create or Update Templates

To create or update the **Pop-up Message** to Patients:

1. Click **Manage Templates**
2. Edit the **Templates**
3. Click **Submit** to save

Your **Pop-Up Message** template has now been **created** or **updated**.

Important: The Message in the template will be display to Banned Patients when they attempt to book online.



Banned Settings ⚙️ Manage Templates + Add Patient

🔍 Search Patients

Banned Message [X]

Level 1 Banned Message: **2**

Dear Patient,
You are not able to book online at this time.
Please call us on
Thank you

Close **Submit** **3**

Ban a Patient

To ban a Patient, in the Banned Settings:

1. Click **Add Patient**
2. Search the **Patient Name** using their first or last name
3. Select the **Ban Level 1** or **Ban Level 2**
4. When completed, you'll see **Ban Added** in the Patient row

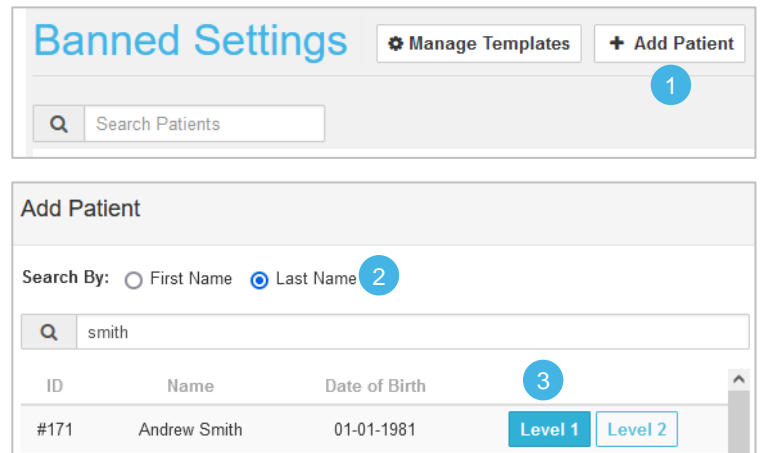
Your Patient has now been banned.

Note: If you want to search a Patient using their full name it must be entered the following way:

Search By: First Name Last Name

🔍 daniel,craig

There should be no space between the names and comma.



Banned Settings ⚙️ Manage Templates + Add Patient

🔍 Search Patients

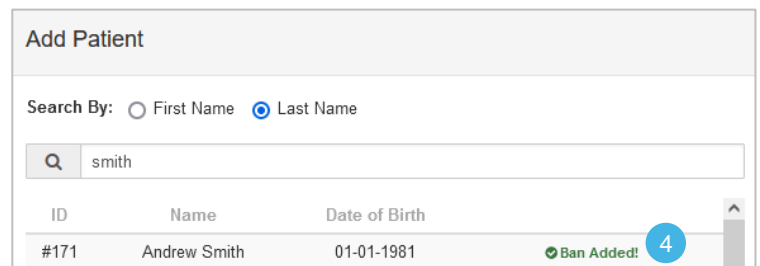
Add Patient

Search By: First Name Last Name **2**

🔍 smith

| ID | Name | Date of Birth | | |
|------|--------------|---------------|----------------|---------|
| #171 | Andrew Smith | 01-01-1981 | Level 1 | Level 2 |

3



Add Patient

Search By: First Name Last Name

🔍 smith

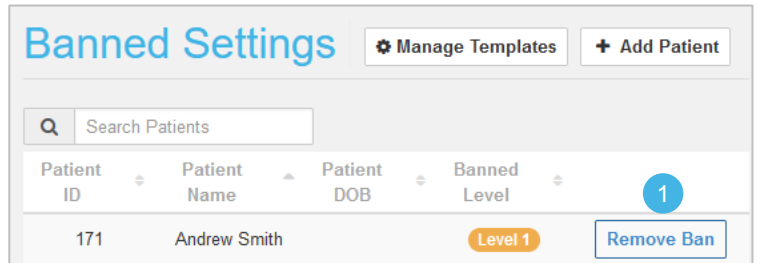
| ID | Name | Date of Birth | | |
|------|--------------|---------------|-------------------|----------|
| #171 | Andrew Smith | 01-01-1981 | Ban Added! | 4 |

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Remove a Patient from the Banned List

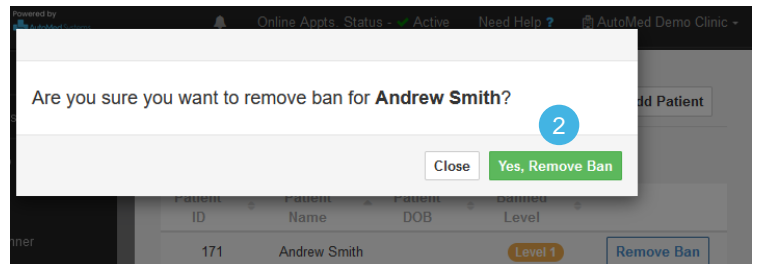
Locate the Patient in the Banned Patient list:

1. Click **Remove Ban**

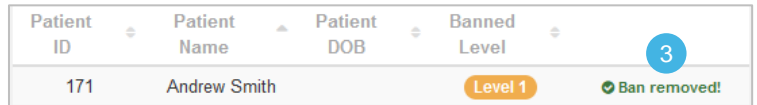


You'll be prompted to confirm your action:

2. Click **Yes, Remove Ban**
3. When completed, you'll see **Ban Removed** in the Patient row



Your Patient has now been **removed** from the banned list.



Outstanding Debt - Online Booking Validation

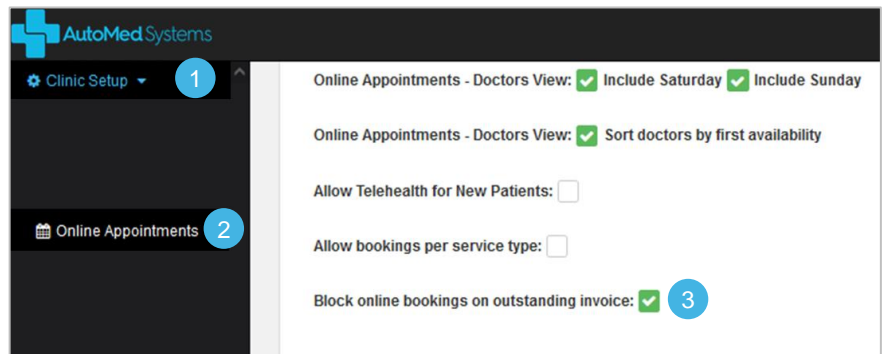
The Outstanding Debt - Online Booking Validation allows you to automatically block online bookings for Patients with outstanding invoices.

The validation is done in real-time and only references invoices that are billed to the Patient or head of family.

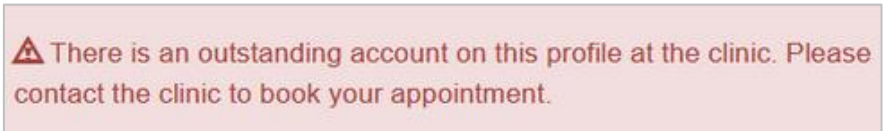
Please Note: Medicare and Work Cover debts are excluded

To enable this function, in the Dashboard:

1. Click **Clinic Setup**
2. Select **Online Appointments**
3. Tick **Block online bookings on outstanding invoices**



When Patients with an outstanding invoice try to book online, they will receive the following Pop-Up:



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FAQ

| | |
|---|--|
| What information do I need to ban a Patient? | What is the difference with Level 1 and Level 2 ban? |
| <p>You need the Patient's full name.</p> <p>The system will populate the Patient's ID and DOB (Date of Birth)</p> <p>To search a Patient using their full name it must be entered the following was: Andrew,Smth</p> <p>There should be no space between the names and comma.</p> | <ul style="list-style-type: none"> • Level 1 advises Patients they can not book online and to contact the clinic • Level 2 advises Patients you are no longer able to accommodate them |
| Do I have to create the templates? | Can I search for existing banned Patients on the list? |
| <p>Yes, click on Manage Template to create or update the Pop-Up Message.</p> | <p>Yes, you can search for Patients by entering their first or last name in the search Patient search bar</p> |
| Can I automatically ban Patients with outstanding invoices from booking online? | |
| <p>Yes, using the Outstanding Debt - Online Booking Validation function, you can automatically block online bookings for Patients with outstanding invoices.</p> | |

Need further assistance?

Reach out to our [Support Team](#) for any day-to-day assistance with AutoMed System

- Email: support@automedsystems.com.au