

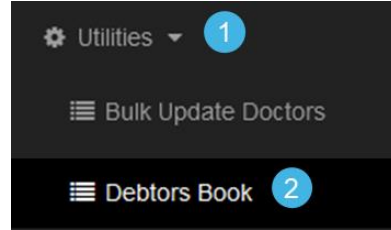
AutoMed Debtor's Book Utility Guide

This guide will take you through how to use the Debtor's Book to follow up unpaid invoices.

Access Debtor's Book

From the main menu:

1. Select **Utilities**
2. Click **Debtor's Book**



Debtor's Book

Using the Debtor's Book, you'll be able to send a secure SMS message to patients with an outstanding invoice.

What is a secure message?

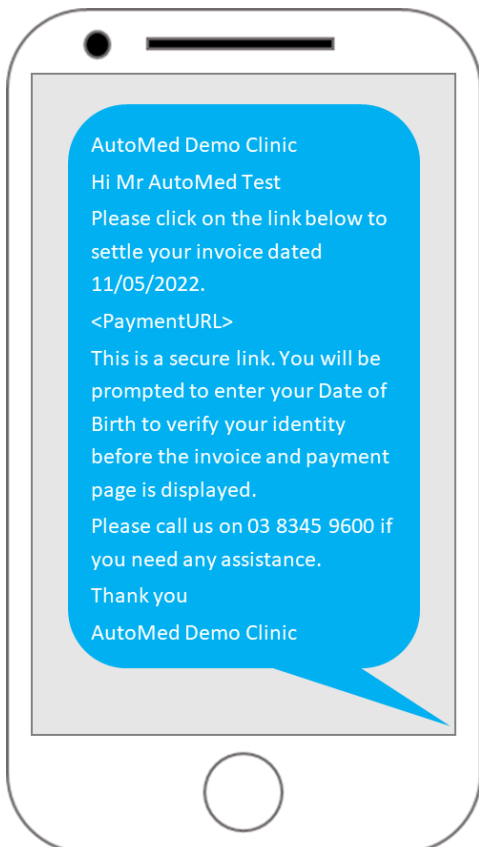
A secure message is an SMS which requires the patient to click on a link and verify their identity to read the full message, or view the invoice and payment details.

To open the link, patients must enter their Date of Birth (DOB).

What happens when patients pay the invoice?

- The patient will be sent an **invoice** for the amount paid
- The payment is settled/receipted into **PracSoft / BP** in real-time

Secure SMS Example



Invoice Example

Dr James-Frederick The 1st
 Unit 206
 111 Overton Road
 Williams Landing 3027
 Phone: 0452488096
 Fax:

Tax Invoice
 ABN Number: 33009296726
 Invoice Date: 11/05/2022
 For invoice number: 38

Received From:
 Mr. Automed Test
 25 Applebox Cct
 Point Cook, 3030

For Professional Services rendered by:
 Dr James Fredrick
 Provider No: 2124011J

Date	MBS	Description	Fee
12/04/2022	23	Surgery consultation, Level B, NDS, 17:48, 5th visit on the same day.	50.00
Total (this invoice):			50.00
*Medicare Rebate:			38.75
Gap Fee:			11.25
GST Included:			0.00
Surcharge:			1.29
Amount paid:			51.29

Your Medicare benefit payment may be submitted to Medicare by your clinic if your banking details have been registered with Medicare. You can visit: <https://www.humanservices.gov.au/customer/forms/ms013> to register your banking details with Medicare. For all other Medicare related enquiries, please contact Medicare Australia on 132 011.
 *Medicare Rebate applicable to Medicare registered patients only.

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How to use the Debtor's Book

Fill out the required filters:

1. Select **location** (if required)
2. Choose a Doctor or leave the filter at **Select Doctor**, to show all Doctors in your clinic
3. Enter your **Start** and **End Date** (you can run the up to 90 days)
4. Click **Run Audit** to load

Debtors Book
⚙️ Manage Templates

📄 Audit Request Details

Location 1

Doctor 2

Start Date 3

End Date

Run Audit 4

This will display invoices currently outstanding in your Practice Management System (PMS)

Please note: We only show invoices billed for **Head of Family** and **Patient**

Debtors Book
⚙️ Manage Templates
Need Help?

📄 Audit Request Details

Location

Doctor

Start Date

End Date

Run Audit
Export CSV

Total Rows: 17

Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Doctor	Appointment Type	Amount	Surcharge Amount	Appointment Date	Invoice Date	Date URL Sent	Date URL Opened	Total Sent	
						\$160.00	\$0.00	2023-05-25	2023-05-25			0	Send URL Notes
						\$60.00	\$0.00	2023-05-25	2023-05-25	2023-05-25	2023-05-25	1	Resend URL Notes
						\$60.00	\$0.00	2023-05-23	2023-05-23	2023-05-24	2023-05-23	3	Resend URL Notes
						\$80.00	\$0.00	2023-05-26	2023-05-26			0	Send URL Notes
						\$80.00	\$0.00	2023-05-24	2023-05-24	2023-05-25	2023-05-25	1	Resend URL Notes

AutoMed Debtor's Book Utility Guide

How to bill patients with outstanding invoices

Send URL

To send the secure SMS message to patients regarding their invoice:

1. Click the **Send URL**
2. Select the **Template SMS** message
3. Click **Confirm** to send

When the link is sent, it will record the date in **Date URL Sent Column**.

When the patient opens the secure link, it will record the date in the **Date URL Opened Column**.

Appointment Date	Invoice Date	Date URL Sent	Date URL Opened	Total Sent	
2023-05-26	2023-05-26			0	<div style="text-align: right;"> Send URL Notes </div> <div style="text-align: right; margin-top: 5px;"> Charge Card </div>

Select Template

Select Template ✕

Tier 1 - Payment URL Message

Tier 1 - Payment URL Message

Tier 2 - Payment URL Message

Tier 3 - Payment URL Message

Select Template

Select Template ✕

Tier 1 - Payment URL Message

Close
Confirm

AutoMed Debtor's Book Utility Guide

How to bill patients with outstanding invoices, cont.

Charge Card

If patients have saved their card details, you'll be able to charge the card directly by clicking **Charge Card**

Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Doctor	Appointment Type	Amount	Surcharge Amount	Appointment Date	Invoice Date	Date URL Sent	Date URL Opened	Total Sent	
						\$160.00	\$0.00	2023-05-25	2023-05-25			0	Send URL Charge Card Notes

Resend URL

You are able to resend the link as many time as required, by clicking the **Resend URL** button

Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Doctor	Appointment Type	Amount	Surcharge Amount	Appointment Date	Invoice Date	Date URL Sent	Date URL Opened	Total Sent	
						\$60.00	\$0.00	2023-05-23	2023-05-23	2023-05-24	2023-05-23	3	Resend URL Notes

Payment not captured in PMS (Practice Management System)

If you see **Paid** in the patient row, the payment has been taken from the patient account, but did not update to your PMS. Please capture the payment in your PMS directly.

Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Doctor	Appointment Type	Amount	Surcharge Amount	Appointment Date	Invoice Date	Date URL Sent	Date URL Opened	Total Sent	
					Post paid Standard appt	\$160.00	\$0.00	2023-05-25	2023-05-25	2023-05-26	2023-05-26	1	Paid 2023-05-26 13:42:52 Notes

Notes

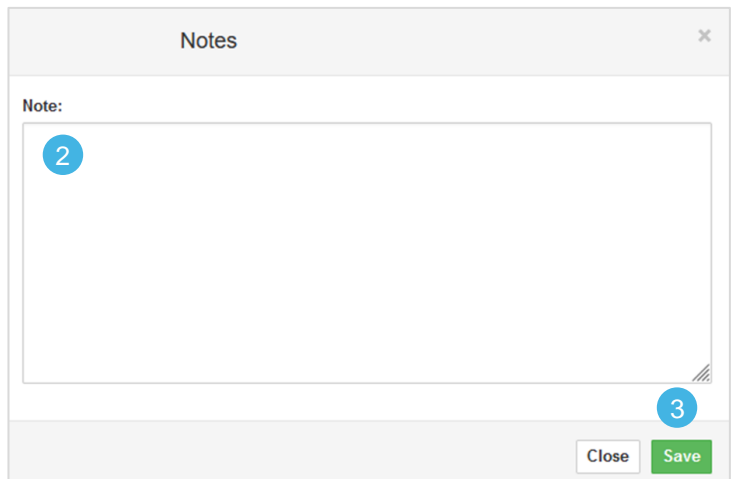
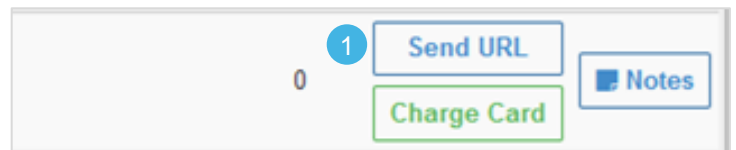
To write a note:

1. Click on **Notes**

A new window will display

2. Write your note in the **text box**

3. Click **Save**



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Medicare rebates

Pracsoft

PracSoft does not allow AutoMed to facilitate Medicare rebates for patients.

There are two options for processing Medicare rebate:

- Patients can claim their own rebate via their MyGov / Express Medicare

Or

- Staff will need to create an additional invoice in PracSoft and receipt it so that they can process Medicare via your usual process (and then delete the 1st transaction)

Best Practice

Best Practice does not allow AutoMed to facilitate Medicare rebates for patients.

Important: Medicare rebates must be processed on the day payment is made

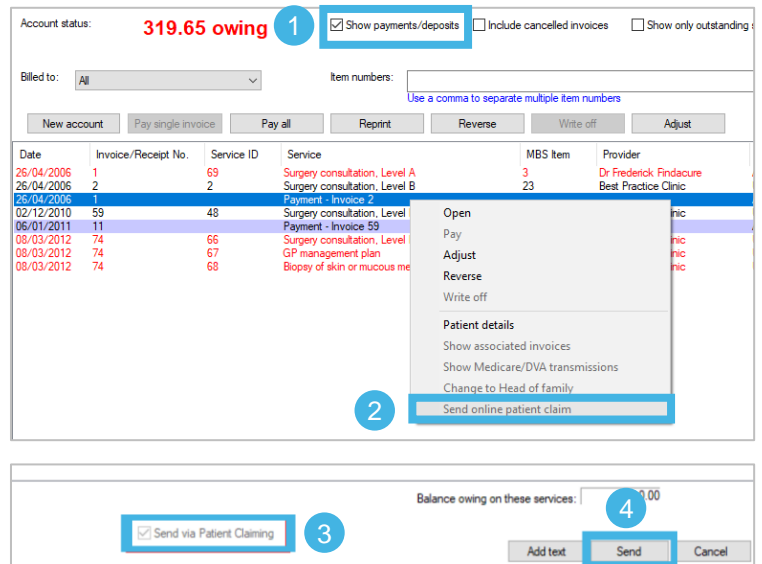
There are two options for processing Medicare rebate:

- Patients can claim their own rebate via their **MyGov / Express Medicare**.

Or

- The request can be action in Best Practice::

1. Open the **Patient's Account Holder History** in BP. This can be done by pressing **Ctrl+F6** whilst on the patient in the appointment book in BP.
2. Tick the **Show payments/deposits** tick box.
3. Locate the payment in BP and right click on the **Payment** and click **Send Online Patient claim**
4. Tick **Send as Patient Claiming** and Click **Send**



Account status: **319.65 owing** 1 Show payments/deposits Include cancelled invoices Show only outstanding

Billed to: All Item numbers: Use a comma to separate multiple item numbers

Buttons: New account, Pay single invoice, Pay all, Reprint, Reverse, Write off, Adjust

Date	Invoice/Receipt No.	Service ID	Service	MBS Item	Provider
26/04/2006	1	69	Surgery consultation, Level A	3	Dr Frederick Findacure
26/04/2006	2	2	Surgery consultation, Level B	23	Best Practice Clinic
26/04/2006	1		Payment - Invoice 2		
02/12/2010	59	48	Surgery consultation, Level		
06/01/2011	11		Payment - Invoice 59		
08/03/2012	74	66	Surgery consultation, Level		
08/03/2012	74	67	GP management plan		
08/03/2012	74	68	Biopsy of skin or mucous me		

Context menu options: Open, Pay, Adjust, Reverse, Write off, Patient details, Show associated invoices, Show Medicare/DVA transmissions, Change to Head of family, **Send online patient claim** (highlighted)

Balance owing on these services: 0.00

Send via Patient Claiming 3 4

What happens if you do not process the rebate on the day in Best Practice?

- You can ask your patient to claim their rebate via their MyGov / Express Medicare

Or

- Delete the invoice from Best Practice and re-create the invoice in BP with today's date, to claim the rebate.
- **Important:** Please keep the **service date** the same as on the **original invoice**.