

AutoMed Systems – Doctor's Portal Guide

This guide will take you through how to use AutoMed System's Doctor's Portal.

Tip! Click on the Topic to go straight to that page

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AutoMed Systems Doctor's Portal

AutoMed Systems Doctor's Portal lets you easily do the following:

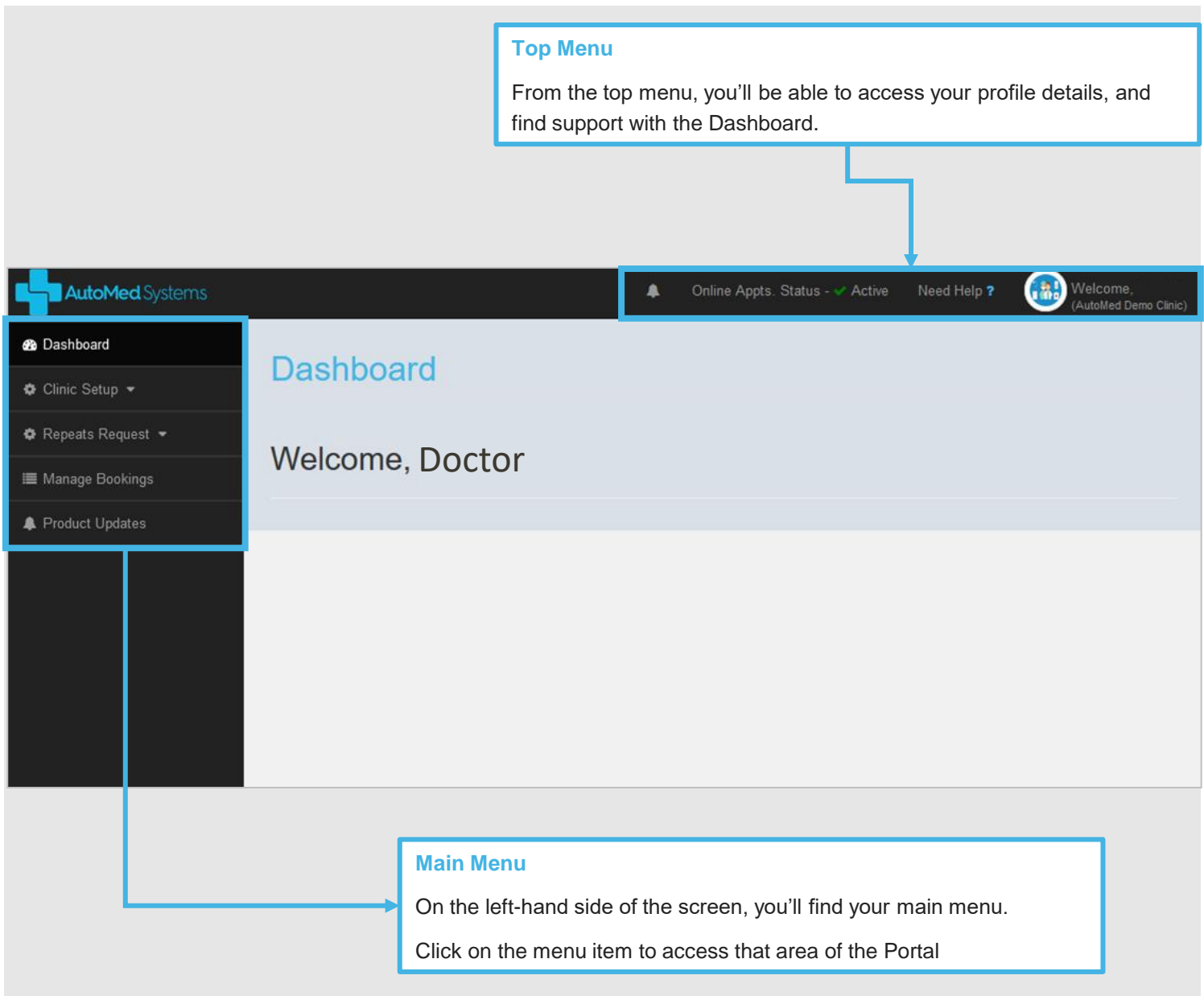
Repeat Request

- Approve and decline Referrals and Scripts

Appointment Bookings

- View upcoming Appointments
- Initiate or create Telehealth Consults
- View completed Consent Forms
- Resend Consent Forms to Patients to complete

Screen Layout



Top Menu
From the top menu, you'll be able to access your profile details, and find support with the Dashboard.

Main Menu
On the left-hand side of the screen, you'll find your main menu. Click on the menu item to access that area of the Portal

The screenshot shows the AutoMed Systems Doctor's Portal interface. At the top, there is a dark navigation bar with the AutoMed Systems logo on the left and user information on the right, including a notification bell, 'Online Appts. Status - Active', 'Need Help?', and a profile icon with the text 'Welcome, (AutoMed Demo Clinic)'. Below this is a main content area with a light blue header containing the word 'Dashboard' and a large 'Welcome, Doctor' message. On the left side, there is a dark sidebar menu with a blue border, containing the following items: 'Dashboard', 'Clinic Setup', 'Repeats Request', 'Manage Bookings', and 'Product Updates'. Two blue callout boxes with arrows point to the top navigation bar and the sidebar menu, respectively, providing instructions on how to use them.

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Repeat Request - Scripts

How can you use Repeat Scripts?

Use Repeat Scripts to view request sent to you from Patients. You'll be able to view what the Patient has requested and chose to Approve or Decline the request. You also be able send you patients SMS messages relating to the Script.

Filters

Listed below are what the filters will show:

- **Date Range:** Choose a date range to view requested Scripts or Referrals
- **Location:** Choose the Clinic Location if applicable
- **Patient:** Enter a Patient's name to view a Patient's specific request, or leave blank to view all Patients' request
- **Status:** Leave filter at All to view all Repeat Request, or select from Approved, Decline or Sent to Doctor

Run the Report

1. Enter the **Date Range**
2. Choose a **Location** if applicable
3. Enter a **Patient's name** if applicable
4. Leave at **All Status**
5. Click **Filter** to run the report

The report will show the script request for the date range selected.

Repeat Scripts

Filter

Date From 2023-03-01

Location All Locations

Date To 2023-06-02

Patient Name Patient Name

Status All

Filter

Date	Location	Status	Doctor	Patient	Delivery Method	Date of Birth	
2023-04-24 11:30:42	AutoMed Test Clinic	Sent to Doctor	Dr Chris Matthews	David Allen	eScript - Email to Pharmacy	06-10-1960	Review
2023-03-27 02:39:21	AutoMed Test Clinic	Declined	Dr Chris Matthews	David Allen	eScript - Email	06-10-1960	View Details
2023-03-15 07:21:18	AutoMed Test Clinic	Completed	Dr Chris Matthews	Hendrik Putter	Collect from Clinic	30-03-1978	View Details

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Action a new Script Request

To approved or decline a new Script request:

1. Select **Review** in the Patient row

Repeat Scripts

Filter

Date From
2023-04-01

Date To
2023-06-02

Status
All

Location
All Locations

Patient Name
Patient Name

Filter

Date	Location	Status	Doctor	Patient	Delivery Method	Date of Birth	1
2023-04-24 11:30:42	AutoMed Test Clinic	Sent to Doctor	Dr Chris Matthews	David Allen	eScript - Email to Pharmacy	06-10-1960	<div style="border: 1px solid #007bff; padding: 2px 5px; color: #007bff;">Review</div>

A new window will **pop-up**.

You'll be able to see what script the Patient has requested; the Patient's details, Script delivery and Script status.

Review Script Request

Patient: David Allen
Gender: O
DOB: 06-10-1960
Status: PENDING

Mobile:
Email:
Location: AutoMed Test Clinic
Delivery Method: eScript - Email to Pharmacy
eScript - Email to Pharmacy:

Send Message
Message History

Send Message to patient:

Send Message

Medication	Dosage	Times / Day	Note
1	1	1	1

2
Decline
Complete

To approved or decline a new request:

2. Select **Complete** to **Approve** the script, or **Decline** to **not Approve** the script

What happens when a script is completed?

The Patient will receive an SMS advising the Script has been approved, you must ensure the Script is issued as per the Patient's request e.g., via eScript / to be collected.

Payment will process and the Patient will receive a receipt via email. The receipt invoice will be created in BP / PracSoft.

What happens when a script is declined?

The Patient will receive an SMS advising the script has not been processed and to book an appointment to discuss.

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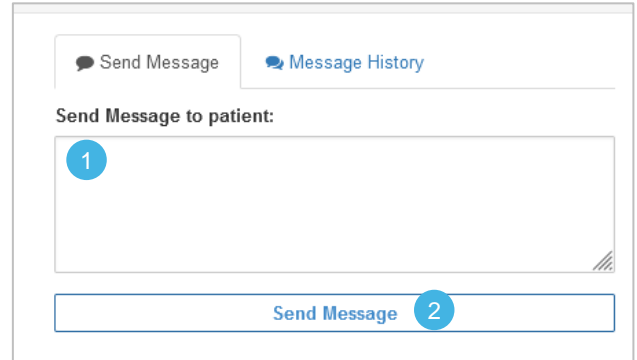


Send an SMS Message and view Message History

To send an SMS Message:

1. Enter the message you would like to send in the **text box**
2. Click **Send Message**

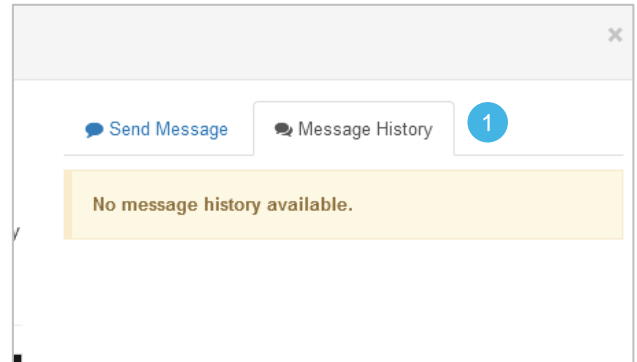
The message will be **sent** directly to the Patient



To view the Message History:

1. Click **Message History**

The Patient's Message History for Scripts will display



Listed below are examples of **Decline** and **Completed** scripts

Review Script Request

Patient: David Allen **Mobile:**
Gender: O **Email:**
DOB: 06-10-1960 **Location:** AutoMed Test Clinic
Status: DECLINED **Delivery Method:** eScript - Email

Medication	Dosage	Times / Day	Note
Test	1	1	

Send Message Message History

Send Message to patient:

Send Message

Review Script Request

Patient: Hendrik Putter **Mobile:**
Gender: O **Email:**
DOB: 30-03-1978 **Location:** AutoMed Test Clinic
Status: COMPLETED **Delivery Method:** Collect from Clinic

Medication	Dosage	Times / Day	Note
Asprin	100ml	1	

Send Message Message History

Send Message to patient:

Send Message

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Repeat Request - Referral

How can you use Repeat Referral?

Use Repeat Referral to view request sent to you from Patients. You'll be able to view what the Patient has request and chose to Approve or Decline the request.

Filters

Listed below are what the filters will show :

- **Date Range:** Choose a date range to view requested Referrals
- **Location:** Choose the Clinic location if applicable
- **Patient:** Enter a Patient's name to view a Patient's specific request, or leave blank to view all Patients' request
- **Status:** Leave filter at All to view all Repeat Request, or select from Approved, Decline or Sent to Doctor

Run the Report

1. Enter the **Date Range**
2. Choose a **Location** if applicable
3. Enter a **Patient's name** if applicable
4. Leave at **All Status**
5. Click **Filter** to run the report

The report will show the referral request for the date range selected.

Repeat Referrals

Filter

Date From 2023-03-01

Location All Locations

Date To 2023-06-02

Patient Name Patient Name

Status All

Filter

Submit

Date	Location	Status	Doctor	Patient	Delivery Method	Request Details	Decline	Complete
2023-04-24 10:20:43	AutoMed Test Clinic	Declined	Dr Chris Matthews	David Allen	Email to Specialist [Urgent]	Show Details	○	○
2023-04-24 10:12:23	AutoMed Test Clinic	Completed	Dr Chris Matthews	David Allen	Email to Specialist	Show Details	○	○

Submit



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Action a new Referral Request

To approved or decline a new Referral request:

1. Tick **Complete and Decline** in the Patient row
2. Click **Submit**

The status will change to Completed or Declined

Date	Location	Status	Doctor	Patient	Delivery Method	Request Details	Decline	Complete
2023-04-24 10:20:43	AutoMed Test Clinic	Declined	Dr Chris Matthews	David Allen	Email to Specialist [Urgent]	Show Details	<input type="radio"/>	<input type="radio"/>
2023-04-24 10:12:23	AutoMed Test Clinic	Completed	Dr Chris Matthews	David Allen	Email to Specialist	Show Details	<input type="radio"/>	<input type="radio"/>

Submit

The status will change to **Completed** or **Declined**

Status	Doctor	Patient
Declined	Dr Chris Matthews	David Allen
Completed	Dr Chris Matthews	David Allen

What happens when a referral is completed?

The patient will receive an SMS advising the referral has been approved, you must ensure the referral is issued as per the patient's request e.g., via eScript / to be collected.

Payment will process and the patient will receive a receipt via email. The receipt invoice will be created in BP / PracSoft.

What happens when a referral is declined?

The patient will receive an SMS advising the referral has not been processed and to book an appointment to discuss.

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To view the Referral Request details:

1. Click **Show Details**

Dr Chris Matthews	David Allen	Email to Specialist [Urgent]	Show Details	1	<input type="radio"/>	<input type="radio"/>
Dr Chris Matthews	David Allen	Email to Specialist	Show Details		<input type="radio"/>	<input type="radio"/>


A new window will **pop-up**.

You'll be able to see the Referral Details.

Request Details ×

Patient: David Allen	Mobile:
Gender: O	Email:
DOB: 06-10-1960	Location: AutoMed Test Clinic
	Delivery Method: Email to Specialist [Urgent]
	Email to Specialist:

Specialist: Dr John Smith
Specialist Address: St Vincent Hospital
Reason for referral: 3 month referral expired
Special note: Thyroid review

 **Print**

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Manage Bookings

How can you use Manage Bookings?

Use Manage Bookings to view upcoming Appointments. You'll be able to start or create Telehealth Consults and view Consent forms linked to Appointment Types.

Filters

Listed below are what the filters will show:

- **Location:** Choose the Clinic location if applicable
- **Appointment Type:** Leave filter at All to view all Appointment Types, or select a certain Appointment Type to view in the report
- **Date Range:** Choose a date range to view requested scripts or referrals
- **Patient:** Enter a patient's name to view a specific Patient's upcoming appointment, or leave blank to view all Patients' upcoming appointments

Run the Report

1. Choose a **Location** if applicable
2. Leave at **Select Appointment Type**, to view all appointments
3. Enter the **Date Range**
4. Enter a **Patient's name** if applicable
5. Click **Filter** to run the report

The report will show all upcoming Appointments for the date range selected.

Manage Bookings

Filter Options

Location 1

Appt. Type 2

Date From 3

Date To

Patient Name 4

Filter 5

Q Total Rows: 11

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appt. date	Patient	Patient DOB	Patient Mobile	
2023-05-01	08:00 PM	Dr Chris Matthews	Standard appt.	2023-01-15	Mr. Automed Test	01-01-2001		View Details
2023-05-02	09:45 AM	Dr Chris Matthews	Video Consult	2020-05-20	Ms. Mary-Anne Automed	20-03-1990		View Details
2023-05-04	10:40 AM	Dr Chris Matthews	New patient		Mr. Hendrik0405 Putter0405	30-03-1978		View Details
2023-05-08	08:20 AM	Dr Chris Matthews	Standard appt.	2023-06-02	Hendrik Putter	30-03-1978		View Details

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Manage Bookings

In the report, you'll be able to see:

- What date and time the appointment is booked for
- The Appointment Type
- Your name in the Doctor Column
- The Patient's last face to face visit
 - ❖ Patients who have not had a face-to-face visit in the last 12 months, will highlight in red
- Patient's name
- Patient's DOB
- Mobile number

Manage Bookings

Filter Options

Location

Appt. Type

Date From

Date To

Patient Name

[Filter](#)

Total Rows: 11

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appt. date	Patient	Patient DOB	Patient Mobile	
2023-05-01	08:00 PM	Dr Chris Matthews	Standard appt.	2023-01-15	Mr. Automed Test	01-01-2001		View Details
2023-05-02	09:45 AM	Dr Chris Matthews	Video Consult	2020-05-20	Ms. Mary-Anne Automed	20-03-1990		View Details
2023-05-04	10:40 AM	Dr Chris Matthews	New patient		Mr. Hendrik0405 Putter0405	30-03-1978		View Details
2023-05-08	08:20 AM	Dr Chris Matthews	Standard appt.	2023-06-02	Hendrik Putter	30-03-1978		View Details
2023-05-11	11:10 AM	Dr Chris Matthews	Standard appt.	2023-01-15	Mr. Automed Test	01-01-2001		View Details
2023-05-16	08:10 AM	Dr Chris Matthews	Standard appt.	2023-01-15	Mr. Automed Test	01-01-2001		View Details
2023-05-24	11:10 AM	Dr Chris Matthews	Telehealth Consult	2022-10-19	David Allen	06-10-1960		View Details
2023-05-25	02:45 PM	Dr Chris Matthews	Standard appt.		Miss Isabella Pawlisz	15-03-1996		View Details
2023-05-26	10:00 AM	Dr Chris Matthews	Video Consult	2020-05-20	Ms. Mary-Anne Automed	20-03-1990		View Details
2023-05-30	03:40 PM	Dr Chris Matthews	Standard appt.	2022-10-19	David Allen	06-10-1960		View Details
2023-05-31	08:40 AM	Dr Chris Matthews	Telehealth Consult	2022-10-19	David Allen	06-10-1960		View Details

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Manage Bookings – View Details

To view the booking details for the Patient:

1. Click **View Details** in the patient Row

A new window will **pop-up**

	appt. date	Patient	DOB	Mobile
ppt.	2023-01-15	Mr. Automed Test	01-01-2001	View Details
sult	2020-05-20	Ms. Mary-Anne Automed	20-03-1990	View Details

From here, you'll be able to:

- View Consent Forms, if linked to the Appointment type
- Start a Telehealth Appointment
- Create a Telehealth Appointment

Consent Form

If the Appointment Type has a Consent form linked, you'll be able to see if it has been completed.

If the form has not been completed, you'll be able resend the form by **Clicking Resend Consent URL**

Booking Details

<p>Patient: David Allen</p> <p>Mobile:</p> <p>DOB: 06-10-1960</p>	<p>Appointment Date: 2023-05-30</p> <p>Appointment Time: 03:40 PM</p> <p>Appointment Type: Standard appt.</p>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between;"> Consent Form Telehealth Create Telehealth Invite </div> <div style="background-color: #fff9c4; padding: 10px; margin-top: 10px;"> <p>⚠ Patient has not signed the consent form. Please click on Resend consent URL button to send consent form to patient.</p> </div> <div style="text-align: center; margin-top: 10px;"> Resend consent URL </div>
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[Close](#)

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Create Telehealth Invite

To create a new Telehealth Invite:

1. Click **Create Telehealth Room**

Booking Details

Patient: David Allen	Appointment Date: 2023-05-30	Consent Form	Telehealth	Create Telehealth Invite
Mobile:	Appointment Time: 03:40 PM			
DOB: 06-10-1960	Appointment Type: Standard appt.			

To create Telehealth invite for non Telehealth appointment type please click on Create Telehealth Room button.

1 Create Telehealth Room

Close

2. Enter the Patient's **Mobile number**

3. Click **Send Invite**

When you are ready to start the Telehealth Consult:

4. Click **Launch Telehealth Consult**

Booking Details

Patient: David Allen	Appointment Date: 2023-05-30	Consent Form	Telehealth	Create Telehealth Invite
Mobile:	Appointment Time: 03:40 PM			
DOB: 06-10-1960	Appointment Type: Standard appt.			

New Telehealth room UZB5012 has been successfully created.

Launch Telehealth Consult 4

Please enter Invitee's mobile number to invite to join Telehealth consult.

Mobile no.:

2

Send Invite 3

Close

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Telehealth

If the Appointment Type has been booked as a Telehealth Consult, you'll be able to start the consult from here.

Booking Details

Patient: David Allen	Appointment Date: 2023-05-30	Consent Form	Telehealth	Create Telehealth Invite
Mobile: 0430462005	Appointment Time: 03:40 PM	<div style="border: 1px solid #ccc; background-color: #e0f2f1; padding: 5px;"><p>ⓘ This consult has been already completed or this appointment type is not an Telehealth appointment type.</p></div>		
DOB: 06-10-1960	Appointment Type: Standard appt.			

[Close](#)

Need further assistance?

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

- Email: support@automedsystems.com.au