

AutoMed Systems – New Patient Form

This guide will take you through how Patients can complete their New Patient Form and where you can manage the forms in the AutoMed Dashboard.

How do you get a New Patient Form created?

Please reach out to the Support Team for Assistance.

How can patients complete the New Patient Form?

The Patient will be sent the New Patient Form via SMS once a new **Patient ID** has been **created** in **Best Practice** or **Medical Director/PracSoft**, and an **Appointment** has been **booked**, (regardless of how the appointment was booked)

Hi Sam, thank you for booking an appointment with us.

Please complete our patient registration form via the secure link below prior to your appointment.

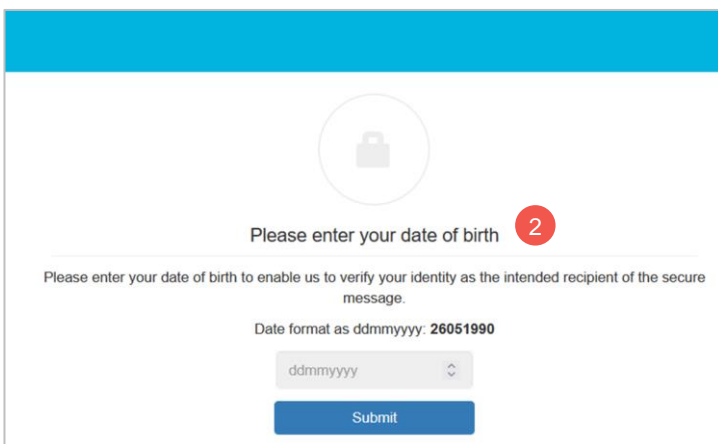
<NewPtURL> **1**

Thank you,
AutoMed Systems
03 8345 9600

Completing the New Patient Form via SMS

1. The Patient clicks on the **link** in the SMS message

The Patient will be directed to a **web browser**.



The screenshot shows a web browser interface for a patient registration form. At the top, there is a blue header bar. Below it, a white box contains a lock icon in a circle. The text reads: "Please enter your date of birth" with a red circle containing the number "2" next to it. Below this, a smaller line of text says: "Please enter your date of birth to enable us to verify your identity as the intended recipient of the secure message." Underneath, it specifies "Date format as ddmmyyyy: 26051990". There is a text input field with "ddmmyyyy" and a dropdown arrow. At the bottom of the form is a blue "Submit" button.

2. The Patient verify their details, by entering their **date of birth**

The Patient can now complete the form.

Where does the New Patient Form save?

Once the patient has **signed** and **submitted** the form, the demographic fields will be **auto-populated**, and a copy of the form will save directly to the patient's **Correspondence In**, in **Best Practice**, and **Documents** in **Medical Director/PracSoft**.

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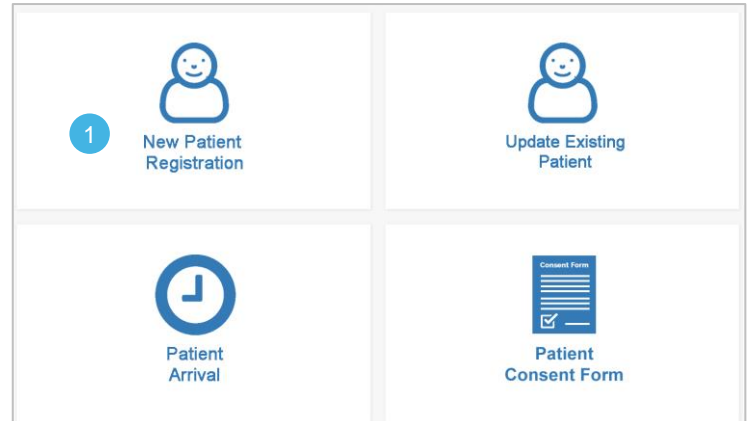
Tablets and New Patient Forms

Patients can complete the New Patient Form on the Tablet in Clinic.

Important! If a New Patient Appointment has already been booked. Reception must search the Patient details on the Tablet prior to giving the tablet to the Patient. This is an important security requirement to prevent patients from accessing patient details.

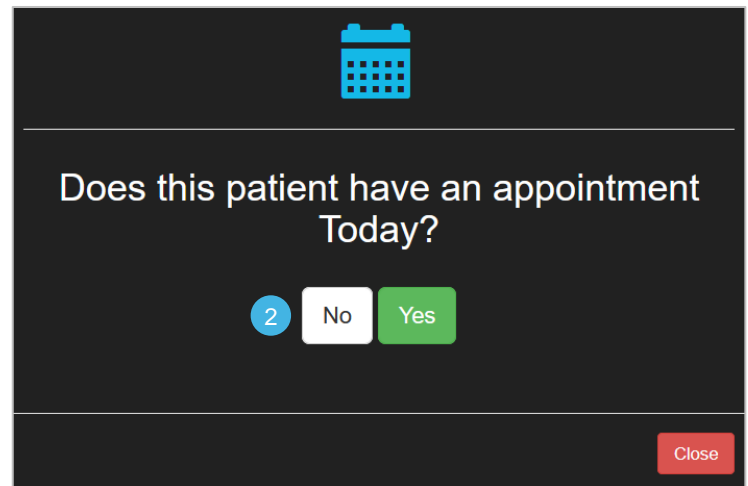
From the Tablet:

1. Reception selects **New Patient Registration Form**



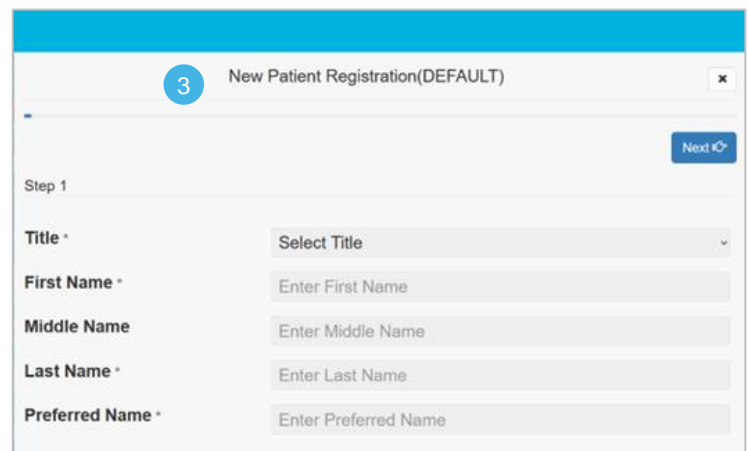
2. Confirm if the patient has an **upcoming Appointment**

The Patient can then be given the Tablet to complete and sign the New Patient Form.



3. Patient **completes** and **signs** the New Patient Form.

Once **signed** and **submitted**, the demographic fields will be **auto-populated**, and a copy of the form will save directly to the patient's **Correspondence In**, in **Best Practice**, and **Documents in Medical Director/PracSoft**.


 A screenshot of a tablet form titled 'New Patient Registration(DEFAULT)'. The form has a white background with a blue header bar. Below the title, there is a 'Next' button with a right-pointing arrow. The form is labeled 'Step 1' and contains five input fields: 'Title' (a dropdown menu with 'Select Title' selected), 'First Name' (text input with placeholder 'Enter First Name'), 'Middle Name' (text input with placeholder 'Enter Middle Name'), 'Last Name' (text input with placeholder 'Enter Last Name'), and 'Preferred Name' (text input with placeholder 'Enter Preferred Name').

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Concierge Entries

Find this report: In the AutoMed Dashboard, under **Concierge Entries**

Use this Report: To view Incomplete and Completed New Patient Registration Forms

Run the Report

1. Enter the **Date Range**
2. Click **Source** (if applicable)
3. Click **Filter**

The report will display patients who have **completed** or **started, and not fully completed** their New Patient Form.

Please note: Patients who have **not started** the New Patient form will not appear in this report.

4. Click **View Details** to view what the Patient has submitted

Concierge Entries

List all New Patient entries submitted from **Concierge Tablet, Online Booking** and **SMS URL**.

Filter -

Date Submitted 2023-09-05
2023-09-12

Source Select Source v

Filter

Q Search New Patient Entry:

Name	Mobile No	Date of Birth	Source	Date Submitted	Status	
			sms-url	2023-09-12 12:27:05	Completed	View Details <input style="width: 15px; height: 15px;" type="checkbox"/>
			online	2023-09-12 01:27:07	Incomplete	View Details <input style="width: 15px; height: 15px;" type="checkbox"/>
			sms-url	2023-09-12 01:16:09	Completed	View Details <input style="width: 15px; height: 15px;" type="checkbox"/>
			sms-url	2023-09-12 01:01:11	Completed	View Details <input style="width: 15px; height: 15px;" type="checkbox"/>
			online	2023-09-11 11:19:15	Completed	View Details <input style="width: 15px; height: 15px;" type="checkbox"/>

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Appointment Book Audit – New Patient Report

Find this report: In the AutoMed Dashboard, under **Utilities > Appointment Book Audit**

Use this Report: To view completed New Patient Registration Forms, and re-send the form

Appointment Book Audit Manage Templates

Audit Request Details

Report Type <input type="text" value="New Patients"/>	Location <input type="text"/>	Doctor <input type="text" value="Select Doctor"/>	Appt. Type <input type="text" value="Select Appointment Type"/>
Start Date <input type="text" value="2022-10-28"/>	End Date <input type="text" value="2022-10-28"/>		

Run Audit
Export CSV

Search Total Rows: 5

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appt. date	Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Attendance	Patient Status	Payment ID
			Medical - QCBMMMQ		Lloyd				Confirmed	Active	Resend New Patient URL
			Medical - QCBMMMQ		Jacob					Active	Signed
			Medical - Employment		Hannah				Confirmed	Active	Resend New Patient URL
			New patient							Active	Resend New Patient URL
			New patient		Adrian					Active	Signed

View Completed Forms:

Completed New Patient Registration Forms will have **Signed** in the Patient Row.

1. Click the **Sign Button** to preview the form

Patient Status	Payment ID
Active	Resend New Patient URL
Active	Signed 1

Resend the Form:

Patients who have not completed the form will have **Resend New Patient URL** in their row.

1. Click the **New Patient URL button** to resend the SMS

Active	2 Resend New Patient URL
Active	Resend New Patient URL
Active	Signed