



Caller ID

with Appointment Book Interface

Why Clinics need AutoMed's Caller ID

- ✓ AutoMed's revolutionary **Caller ID** presents the patient data associated with an incoming call, allowing reception staff to identify the patient quickly and accurately.
- ✓ Caller ID is a unique interactive **"in-house"** Reception Booking tool installed on Manager, Nurse and Reception PC's.
- ✓ AutoMed integrates the clinic PBX/PABX/VOIP to the Practice Management Software to identify the patient when they call.
- ✓ AutoMed looks at each phone system individually and our dedicated engineering team will work closely with you for a bespoke solution.
- ✓ A **Semi non-integrated** version is available to users if required.
- ✓ AutoMed works closely with a number of Phone Providers that can be engaged as required should a new system or upgrade be required.

Features

- ✓ Real time integration between your phone system and your practice management software.
- ✓ Within seconds of the patient calling, reception will be able to immediately identify the calling patient along with a visual display of their demographic detail, patient notes, recalls due (PracSoft), and last doctor seen.
- ✓ Caller ID allows appointments to be made and/or changed (including TeleHealth).
- ✓ Appointment attendance confirmation and cancel feature.
- ✓ View Patient SMS History and Consent, Notification of Outstanding Invoices.
- ✓ Book directly via the booking interface which includes all AutoMed's advanced booking features including generation of Video links for TeleHealth.
- ✓ Capture Credit Card details for Appointments bookings linked to Payments reducing no-shows and manual processing.

Features continued

- ✓ Optional automatic Appointment Confirmation SMS specific to appointment type & single messaging feature.
- ✓ Complex Resource Booking Features (up to 4)
- ✓ Reflects BP Colour Coded appointments.
- ✓ An MMS function will now allow Users to send an Ad Hoc long Single SMS to a selected patient in need.
- ✓ Users can check if an appointment is still awaiting payment

A Few Extras

- ✓ Clinics that use **Yealink** Phones can have the added benefit of the Popup opening with the relevant patient data if the call is transferred from one receptionist to another.
- ✓ Outbound calls with **Yealink** will also trigger the pop-up to open with the patient details ready for any necessary bookings.
- ✓ Integrated with AutoMed's **Vaccine Management** system.
- ✓ Clinics with **AutoMed Kiosk** facilities can also generate a QR label for Medicare Cards for the Kiosk Units Check-in Scanner.

Set-up

- ✓ AutoMed looks at each phone system individually and our dedicated engineering team will work closely with you for a **Fully-integrated** bespoke solution.
- ✓ AutoMed will work with your Phone System and IT Provider regarding configuration and installation on the required PC's.
- ✓ In the event that your phone system is not compatible for integration due to outdated technology, excessive 3rd party licensing fees, warranty issues etc, AutoMed will offer a **Semi-integrated** version which will still have all the functionality of Caller ID.

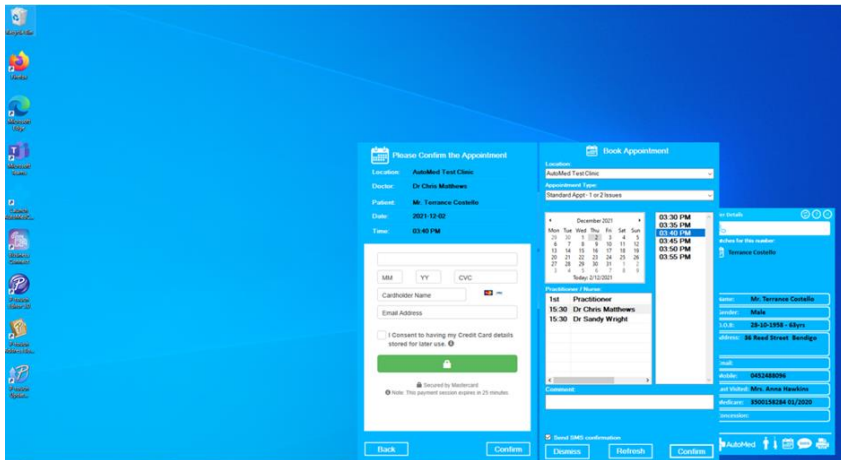
Any associated access and licensing cost are borne by the clinic.

AutoMed Waives the \$300.00 configuration fee.



Optional Inclusions

- ✓ Optional link to AutoMed TeleHealth Video Bookings - Generates the Video links*.
- ✓ Optional link to Vaccine Management Tool*.
- ✓ Optional link to Online Payments - Prepaid or Post Billing*.
- ✓ Optional link to Digital Forms - New Patient Registration SMS*.
- ✓ Optional link to Digital Forms - Consent Form SMS*.
- ✓ Option link to QR Code Printer for Self Check-In Kiosk Users**.
(AutoMed Kiosk Users ONLY)



*Clinics on Complete Services Solution Package will automatically have these Features linked.

**Clinics on Complete Services Solutions with Kiosk will access the QR Code feature.

Search Patient

Fully Integrated.

- ✓ The incoming call will trigger the Pop-up to open with the patient's details.

Caller Details

0425841659

Matches for this number:

- Autocar Test
- Autobot Test
- Autocred Test
- Autobaby Test

Name: Mr. Autocar Test

Gender: Male

D.O.B: 01-01-2001 - 21yrs

Address: 114c Watton Street Werribee

Email: alison@automedsyste

Mobile: 0425841659

Last Visited:

Medicare: 1234567890 11/2023

Concession:

Semi-Integrated (Manual)

- ✓ The User can search the patient by quickly entering the incoming phone number of the patients name etc.

Search Patients - AutoMed CallerID

Phone No./Medicare No.

Please enter either Contact or Medicare details:

Phone Number:

MediCare No: Exp: /

Search Patient

Autom

Using

Surname First Name Medicare No

ID	NAME	SURNAME	DOB
92	Mary-Anne	Automed	20/03/1990
682	Test	Automed	01/01/2001
746	Chris	Automedtest	16/09/2000

Dismiss Load

- ❖ In both instances, if more than 1 patient is listed the User can highlight the patient record, they need to open.

Appointment Booking

- ✓ A **Calendar** will appear next to the Selected Patients Name.
- ✓ Users can change to another patient by clicking on the patient's name.
- ✓ Users can use this to book and view existing appointments.
- ✓ The “**Book Appointment**” screen will appear with the Location, Appointment Type, Calendar and List of Doctors.
- ✓ A Pop-up will also alert Reception if there is an outstanding balance to be paid.

Caller Details

0452488096

Matches for this number:

- Anastasia Abbott
- Madeline Abbott
- Felix Adams
- Fay Allen
- Janelle Allen

Name: Miss Anastasia Abbott

Gender: Female

D.O.B: 25-02-2004 - 18yrs

Address: 12 John St Albany Creek

Email:

Mobile: 0452488096

Last Visited: Dr James Frederick

Medicare: 4133180467 11/2020

HC Card: 1234-ABC 01-01-2035

AutoMed

Book Appointment

Location: AutoMed Test Clinic

Appointment Type: Paediatric Pfizer Dose 1

March 2022

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today: 1/03/2022

Practitioner / Nurse:

1st	Practitioner
12:00	Dr James Frederick

Comment:

Send SMS confirmation

Dismiss Refresh Confirm

Patient Notes.

! Patient has an outstanding balance of \$126.40.

OK

New Patient - Semi-Integrated

- ✓ The User can open Caller ID enter the patients phone number, select **Load** to Create a New Patient.

Search Patients - AutoMed CallerID

Phone No./Medicare No.

Please enter either Contact or Medicare details:

Phone Number: 045248809

Medicare No: Exp: MM / YYYY

Search Patient

Using

Surname First Name Medicare No

ID	NAME	SURNAME	DOB
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Dismiss Load

Caller Details

0452488093

Matches for this number:

Name:

Gender:

D.O.B:

Address:

Email:

Mobile:

Last Visited:

Medicare:

Concession:

AutoMed

Please Enter New Patient Details

Title:

First Name:

Middle Name:

Last Name:

Gender:

DOB: (DD/MM/YYYY)

Medicare No: Line:

Medicare Exp: (MM/YYYY)

Address:

Suburb:

Postcode:

Mobile: 0452488093

E-mail:

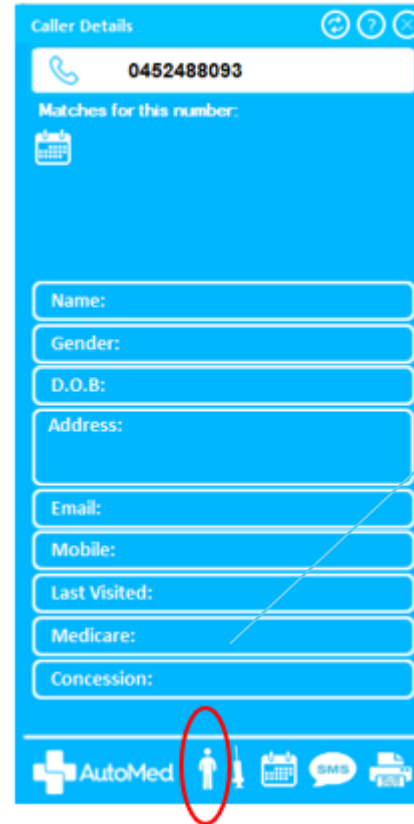
CONTINUE

- ✓ The Demographic box will open, and the User will choose the **New Patient Icon** and create the New Patient record.

- ❖ **Optional** - Once completed, a **New Patient SMS** will trigger prompting the patient to open a link and complete, sign and submit their **New Patient Registration** form.

New Patient - Fully Integrated.

- ✓ The incoming number will trigger the Pop-up to open with the patient's Mobile details.
- ✓ The User will choose the **New Patient Icon** and create the New Patient record.
- ✓ **Optional** - A New Patient SMS will trigger prompting the patient to open a link and complete the Remainder of the New Patient Registration, sign and submit the form.



Caller Details

0452488093

Matches for this number:

Name:

Gender:

D.O.B:

Address:

Email:

Mobile:

Last Visited:

Medicare:

Concession:

AutoMed

The form is titled "Caller Details" and displays the phone number "0452488093". Below the number, it says "Matches for this number:" followed by a list of input fields for Name, Gender, D.O.B, Address, Email, Mobile, Last Visited, Medicare, and Concession. At the bottom, there is a navigation bar with the "AutoMed" logo and several icons, including a person icon which is circled in red.



Please Enter New Patient Details

Title*:

First Name*:

Middle Name:

Last Name*:

Gender*:

DOB*:

Medicare No: Line:

Medicare Exp: (MM/YYYY)

Address:

Suburb:

Postcode:

Mobile*:

E-mail:

0452488093

CONTINUE

The form is titled "Please Enter New Patient Details" and contains several input fields: Title*, First Name*, Middle Name, Last Name*, Gender*, DOB* (with format DD/MM/YYYY), Medicare No, Line, Medicare Exp (with format MM/YYYY), Address, Suburb, Postcode, Mobile* (with value 0452488093), and E-mail. A "CONTINUE" button is at the bottom. An arrow points from the "Mobile" field in the "Caller Details" form to the "Mobile*" field in this form.

Vaccine Bookings or Reservation

- ✓ Vaccine Management Users can use the **Vaccine Icon** to Reserve or Book Vaccinations.




- ✓ The Vaccine/s the clinic is offering will populate along with a stock count.
- ✓ Select the Appropriate Vaccine and Dosage.
- ✓ If Vaccine stock is unavailable there is an associated Reservation list and the User can reserve a dose for the patient.
- ❖ Vaccine stock is managed via the AutoMed Dashboard.

Vaccines

Location: AutoMed Test Clinic

Vaccine	Quantity	Arriving	Reserved	Due Date
65+ Years Flu Vaccine	111			
AstraZeneca Dose 1	95			
AstraZeneca Dose 2	10			
PeardPfizer Dose 1	9982			
Pfizer Dose 1	292			
Pfizer Dose 2	989			

Vaccine Available.

 This Vaccine Is available.
Would you like to book an appointment?

Vaccine name:

6 Months - 64 Years Flu Vaccine [Government]

Due Date:

August 2022						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: 23/08/2022

SMS Options

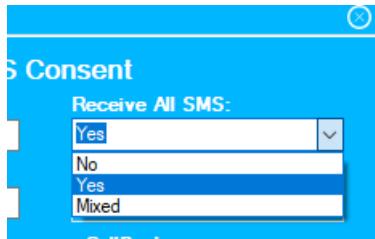
✓ Users will access the SMS Icon for:

- SMS Consent
- SMS History
- To send an Ad Hoc SMS Message



SMS Options - Consent

- ✓ Users can change or update **SMS Consent**
- ✓ Update SMS Consent by choosing from the dropdown as necessary and select **Update**.



A screenshot of a dropdown menu titled "Receive All SMS:". The menu is open, showing four options: "Yes", "No", "Yes", and "Mixed". The "Mixed" option is currently selected and highlighted in blue.

- ✓ If **Mixed Consent** is required Users can then select from the Yes and No toggles and select **Update**.

- ✓ Users may Choose “**Apply to patient Only**” if there is more than 1 patient associated to this number and the Consent change relates only to the listed patient

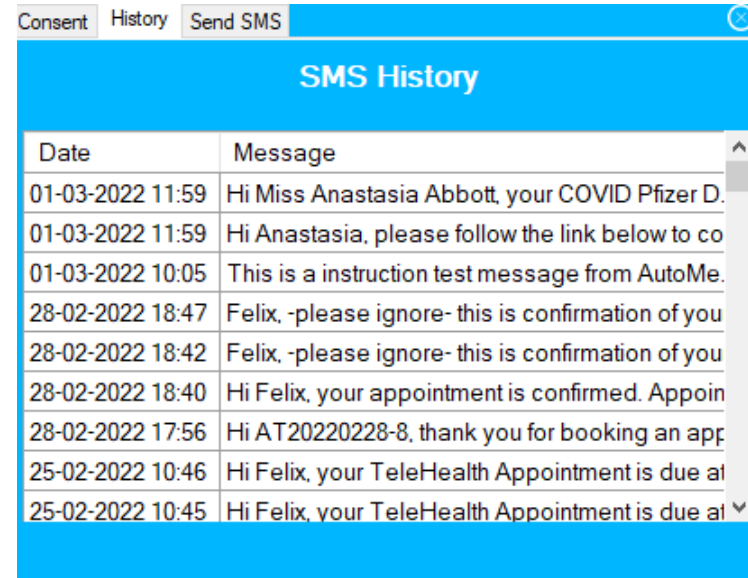


A screenshot of the "SMS Consent" dialog box. The dialog has a title bar with "Consent", "History", and "Send SMS" tabs. The main content area is titled "SMS Consent" and contains the following fields and controls:

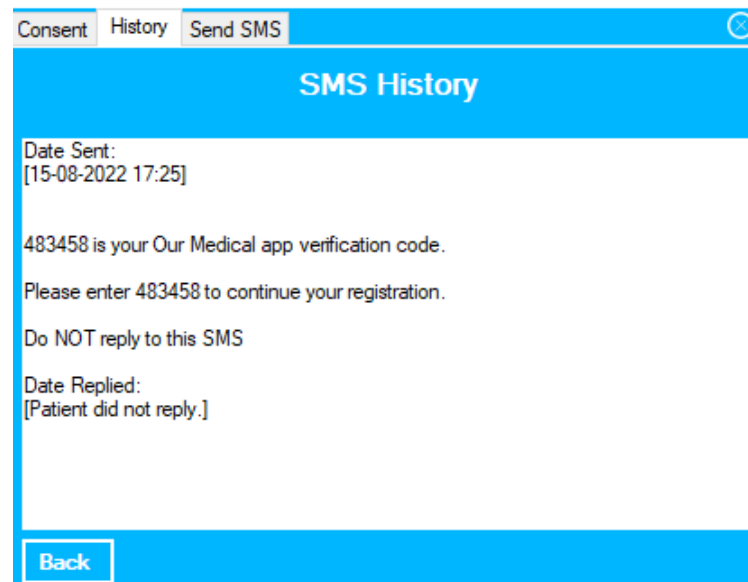
- Patient:** Text input field containing "Anastasia Abbott".
- Number:** Text input field containing "0452488096".
- DOB:** Text input field containing "25-02-2004".
- Apply to patient only:** A checkbox that is currently unchecked.
- Receive All SMS:** A dropdown menu with "Mixed" selected.
- Clinical Reminders:** Radio buttons for "Yes" (selected) and "No".
- CallBacks:** Radio buttons for "Yes" (selected) and "No".
- Appt Reminders:** Radio buttons for "Yes" (selected) and "No".
- Campaigns:** Radio buttons for "Yes" (selected) and "No".
- Update:** A large blue button at the bottom of the dialog.

SMS Options - History

- ✓ Shows ALL AutoMed SMS messaging.
- ✓ Users can double click to open a message for content.
- ✓ Users can Copy - **Ctrl C** - the message content and resend via the “Send SMS” tab in need.



Date	Message
01-03-2022 11:59	Hi Miss Anastasia Abbott, your COVID Pfizer D.
01-03-2022 11:59	Hi Anastasia, please follow the link below to co
01-03-2022 10:05	This is a instruction test message from AutoMe.
28-02-2022 18:47	Felix, -please ignore- this is confirmation of you
28-02-2022 18:42	Felix, -please ignore- this is confirmation of you
28-02-2022 18:40	Hi Felix, your appointment is confirmed. Appoin
28-02-2022 17:56	Hi AT20220228-8, thank you for booking an app
25-02-2022 10:46	Hi Felix, your TeleHealth Appointment is due at
25-02-2022 10:45	Hi Felix, your TeleHealth Appointment is due at



Consent History Send SMS

SMS History

Date Sent:
[15-08-2022 17:25]

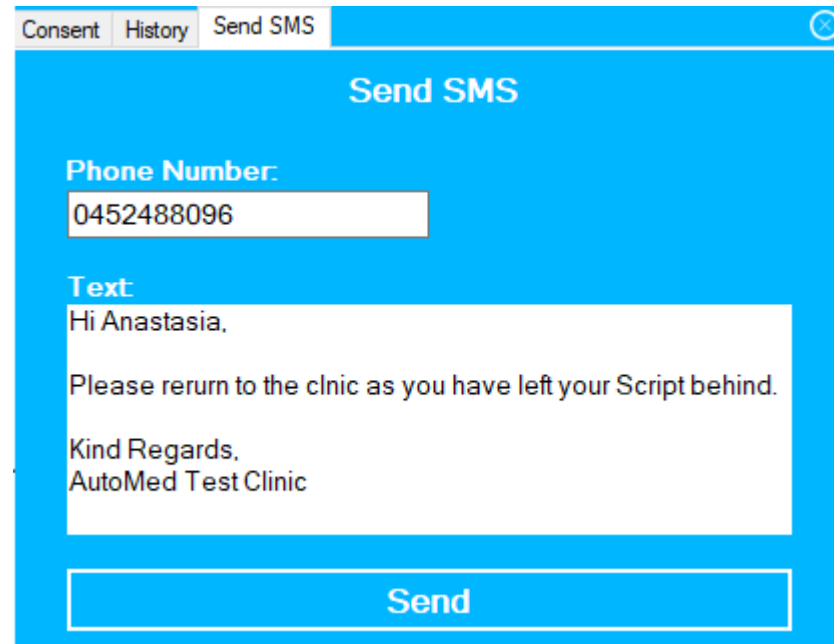
483458 is your Our Medical app verification code.
Please enter 483458 to continue your registration.
Do NOT reply to this SMS

Date Replied:
[Patient did not reply.]

Back

SMS Options - Send SMS

- ✓ Users may send Ad-hoc SMS messages if required.
- ✓ Free type or Paste - **Ctrl V** - the Content of the message and Click Send.
- ✓ Users may also to copy and paste an existing message from History to resend it to the patient via Single Messaging.



The screenshot shows a software window titled "Send SMS" with a blue header and a white body. The window has three tabs: "Consent", "History", and "Send SMS". The "Send SMS" tab is active. Inside the window, there is a "Phone Number:" label above a text input field containing "0452488096". Below that is a "Text:" label above a larger text area containing the message: "Hi Anastasia, Please return to the clinic as you have left your Script behind. Kind Regards, AutoMed Test Clinic". At the bottom of the window is a blue "Send" button.

Calendar

- ✓ The **Calendar Icon** is used to:



- Access existing appointments and make changes such as Appointment Type, Doctor, Date and Time
- Confirm or Cancel appointments from incoming calls or reception visits.

Appointments							
Doctor	Location	Date	Time	Appointment Type	Status	Pay	Confirm Cancel
> Dr Ivor Cure	AutoMed Test Clinic	31-03-2022	08:25 AM	Standard appt...	Future	\$	✓ ✗
Dr Chris Matthews	AutoMed Test Clinic	24-03-2022	01:00 PM	Teleconferenc...	Future	\$	

Confirm or Cancel an Appointment

- ✓ Users can confirm or cancel appointments from incoming calls via the **Calendar Icon**.



- ✓ Users can click on the icon to open a help Pop-up.

Appointments							
Doctor	Location	Date	Time	Appointment Type	Status	Pay	Confirm Cancel
> Dr Ivor Cure	AutoMed Test Clinic	31-03-2022	08:25 AM	Standard appt...	Future	\$	✓ ✗
Dr Chris Matthews	AutoMed Test Clinic	24-03-2022	01:00 PM	Teleconferenc...	Future	\$	

Features: Confirm, Cancel, Move Appointment.
These features only work on future appointments.

Confirm: Press the green button.
Cancel: Press the red button.
Move Appt: Right click an appointment.

OK

Confirm Appointment

Are you sure you wish to confirm this appointment?

Patient: Mary-Anne Automed
Doctor: Dr Ivor Cure
Location: AutoMed Test Clinic
Time: 2022-03-31 08:25 AM
Type: Standard appt.

Created: 2022-03-24 10:58:10

Booked By: AutoMed Systems ExternalVendor

Yes No

Success!

The Appointment has been confirmed.

OK

Changing an Appointment

- ✓ Users can change an existing appointment via the **Calendar Icon**.
- ✓ Users can change the Appointment Type, Doctor, Date and/or Time as required.
- ✓ The **"Change Appt Type Only"** feature has been enhanced to support changing non-billing Face-To-Face appointment type to Billed-Video Consults.
- ✓ This will resolve specific conditions where the Patient's link didn't work after changing the appointment from F2F to "billed" video.

Caller Details

Matches for this number:
Mary-Anne Automated

Name: Ms. Mary-Anne
Gender: Female
D.O.B: 20-03-1990 - 32yrs
Address: 111 Overthere Street Melbourne
Email:
Mobile: 0452488096
Last Visited:
Medicare: 3467888263 06/2024
Concession:

AutoMed

Move Appointment

Location: Louis' Test Clinic
Doctor: Dr James Fredirick
Appointment Type: Telephone consult

Change Appt Type Only

06:00 AM
06:20 AM
06:40 AM
07:00 AM
07:20 AM
07:40 AM
08:00 AM
08:20 AM
08:40 AM
09:00 AM
09:20 AM
09:40 AM
10:00 AM

July 2022						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: 23/07/2022

Dismiss Confirm

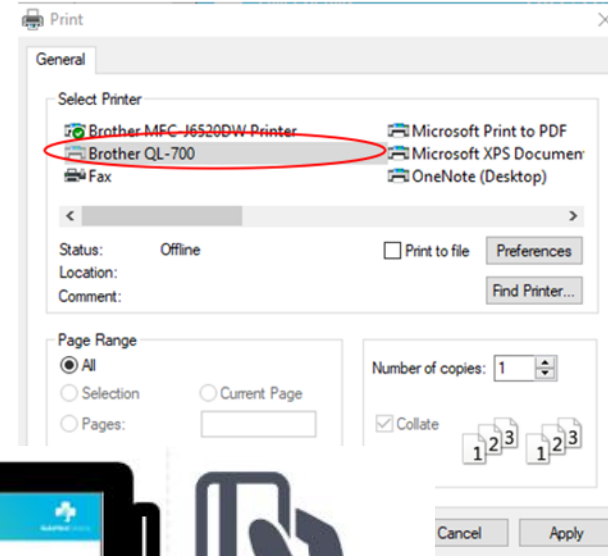
QR Code for Check-in at Kiosk

- ✓ This option is available to Clinics with an **AutoMed Self-Check-in Kiosk** via the **Printer Icon**.



- ✓ Installed at Reception, Users can print and affix a label to the patients Medicare Cards so they can Scan rather than swipe to check-in at the Kiosk.

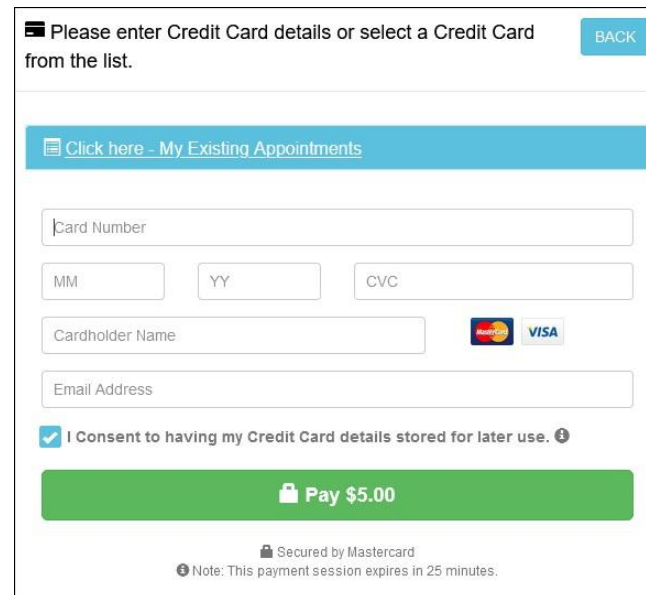
- ✓ A **Brother QL-700 Printer** + Labels can be supplied by AutoMed at cost price + postage.



Payment Link

- ✓ For Clinics using **Tyro eCommerce** for Payments linked to specified Appointments a Tyro Payment box secured by **Mastercard** will open during the Booking Process.
- ✓ The AutoMed Online payment interface as well as the payment interface in the Caller ID to allow patients to re-use the secure token for future transactions.
- ✓ The patients card details are not stored with AutoMed, nor are they visible to the Clinic.
- ✓ Patients can opt not to have the token retained.
- ✓ Patients can also delete the active token or load multiple tokens for multiple Credit Cards.

- ✓ The secure token is simply retained for future use.
- ✓ The saved token is displayed for subsequent transactions, allowing patients to easily select the Credit Card to be used for the next transaction.
- ✓ The token will remain active until the expiry date of the Credit Card.



The screenshot displays a payment interface with the following elements:

- Header: "Please enter Credit Card details or select a Credit Card from the list." with a "BACK" button.
- Link: "Click here - My Existing Appointments" (highlighted in blue).
- Form fields: "Card Number", "MM", "YY", "CVC", "Cardholder Name", and "Email Address".
- Logos: Mastercard and VISA logos.
- Consent: A checked checkbox for "I consent to having my Credit Card details stored for later use." with an information icon.
- Payment Button: A green button labeled "Pay \$5.00".
- Footer: "Secured by Mastercard" and a note: "Note: This payment session expires in 25 minutes."

TeleHealth Video

- ✓ For Clinics using AutoMed's end-to-end TeleHealth Video the Video links will be generated during the Appointment Booking process.
- ✓ A **Optional Confirmation SMS** will trigger along with the Day before **Appointment Reminder SMS** and the **5-minute before consult SMS**.

