



Digital Forms + Concierge

Why you need AutoMed's Integrated Digital Forms

- ✓ AutoMed's **Digital Forms** service provides the means for capturing, and automatically saving **New Patient Registration Forms**, individual **Consent Forms** and updating existing patient information via various digital channels.
- ✓ New patients can complete and sign the clinic's new patient registration form digitally after booking their first **online appointment**, via an **automatic SMS** once their record has been created and their first appointment has been booked in your practice management software.
- ✓ Each function within Digital Forms has a focus on improving data integrity, enabling patients and staff to update and verify patient data in a paperless environment with enhanced patient privacy.
- ✓ The Service easily allows New Patient Registration and/or Consent Forms directly to the patient's file.

Why you need AutoMed's Integrated Concierge

- ✓ AutoMed's **Concierge Service** is the "in-clinic" solution which can be hosted on any android or apple device.
- ✓ Concierge offers New Patient Registrations, Patient Arrival, Existing Patient Updates and Consent Form functions.
- ✓ The Service easily allows New Patient Registration and/or Consent Forms directly to the patient's file.
- ✓ The Patient Arrival feature provides a visual summary to reception staff of the patients due to arrive in the next hour, providing access to data requiring updating as well as outstanding accounts.
- ✓ Includes built-in security features with IP address locks and PIN code verification.

What Information saves to the Patients File?

Best Practice

- ✓ Best Practice will ONLY allow Demographic to be populated to the patients file by a 3rd Party Provider.
- ✓ AutoMed saves all Demographics to BP including Next of Kin and Emergency Contact Details.
- ✓ All other info like Allergies, Medical History, Preventative Health etc saves to a pdf in patients correspondence.

Medical Director

- ✓ AutoMed automatically populates the captured information; Demographic, Clinical, Allergy, Medical History into the corresponding fields in the patient's file.
- ✓ Preventative Health questions will save as an e-copy in the patient's file.

Service Options

- ✓ AutoMed can now offer multiple Options for the New Patient Registration and Consent forms.
- ✓ These options require specific AutoMed Services to be active such as SMS Messaging, Online Appointments, Caller ID or optional BYO Tablet/s.
- ✓ Clinics with additional active Services can have one, some or all of the options below.
- ✓ Complete Solutions Package Users can use ALL options.
- ✓ Concierge Requires BYO tablet to be provided by the clinic.

Set up

- ✓ Clinics can email in Word Format their New Patient Registration form including Terms and Conditions to be digitised.
- ✓ Clinics can email in Word Format their Consent form to be digitised.
i.e. Flu Vaccination, Ear Syringing, Skin Lesion Procedures etc.
- ✓ AutoMed Uses the Australian Government COVID Consent Forms already digitised, so will link these when we set up any COVID Vaccine appointment types.
- ✓ AutoMed can accommodate the DASS 2 and 42, K10, and Sleep Scale if required – just let us know to add these in.

New Patient Registration

- ❖ Link to Secure SMS with Dedicated URL Link.
- ❖ Optional Follow-up SMS via Appointment Book Audit Utility *
Complete Services Solution s Users ONLY*
- ❖ Concierge via BYO Tablet



Hi <PtName>,
Thank you for booking an appointment with us
If you have not already completed your patient registration online, please follow this secure link to do so now.
<https://automedsystems.com.au/online/np/demoF9h6lj>

A screenshot of a web application interface. A white modal dialog box is centered on the screen, titled 'Paperless Registration'. The dialog contains a clock icon, the title, and a paragraph of text explaining the purpose of the registration. Below the text are two buttons: 'Close' and 'Continue'. In the background, a registration form is visible with fields for Name, Doctor, Date, and Location. To the right of the form, there is a section for 'AutoBot Test' with the name 'Chris Matthews' and a timestamp '20 Nov 12:45 PM'. Below the form, there is a 'Thank you' message and a 'Close' button.

New Patient Registration

- ✓ An automated SMS with a secure link that will send to all new patients within 5 minutes of their new patient record being created in the Practice Management Software, with an appointment booked at the same time.
- ✓ The Patient will be asked to complete the Registration via SMS with a secure link containing the Single Use URL.
- ✓ This trigger will also engage should the New Patient be created and subsequent Appointment Booked via Caller ID.
- ✓ The Appointment Book Audit Tool can be used to check incoming forms and trigger a Reminder SMS with the URL link to complete the form.*

Complete Services Solutions User ONLY*

Requires AutoMed's Online Appointments and SMS Services to be active.

Consent Form

- ❖ Link to Online Appointments
- ❖ Link to Caller ID triggered SMS
- ❖ Concierge via BYO Tablet



Please complete consent form

**COVID-19
VACCINATION**

Consent form for COVID-19 vaccination

People who have a COVID-19 vaccination have a much lower chance of getting sick from the disease COVID-19.

You need to have the vaccination two times on different days- 12 weeks apart. There are different brands of vaccine- you studied COVID-19 vaccines to make sure they are safe.

Most side effects, including local reaction at injection site headaches, fever, tiredness, are very common but are often mild and very rare, and unknown side effects will be monitored.

Please tell us if you have any side effects like a sore arm, headache, fever, fatigue, headache, chills, muscle pains, joint pain, or symptom relief.

Before you get vaccinated, tell the person giving you the vaccination if you:

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Do you have any serious allergies, particularly anaphylaxis, to anything, or carry or have been prescribed any medication for allergies?
<input type="checkbox"/>	<input type="checkbox"/>	Have you had an allergic reaction after being vaccinated before?

Hi Lucy, please follow the link to complete the consent form that is required for your upcoming appointment.

<https://automedsystems.com.au/online/cf/XoarPUv58>

Thankyou
AutoMed Test Clinic
03 9741 0477

Consent Form

Linked to Online Appointment

- ✓ The Consent form can be linked to the Online Appointment to be completed and submitted.
- ✓ The form opens during the Appointment Booking process for the patient to complete and submit before moving onto complete the remaining steps and confirm the booking.
- ✓ The Appointment Book Audit Tool can be used to check incoming forms and trigger a Reminder SMS with the URL link to complete the form.

Requires AutoMed's Online Services to be active.

Consent Form

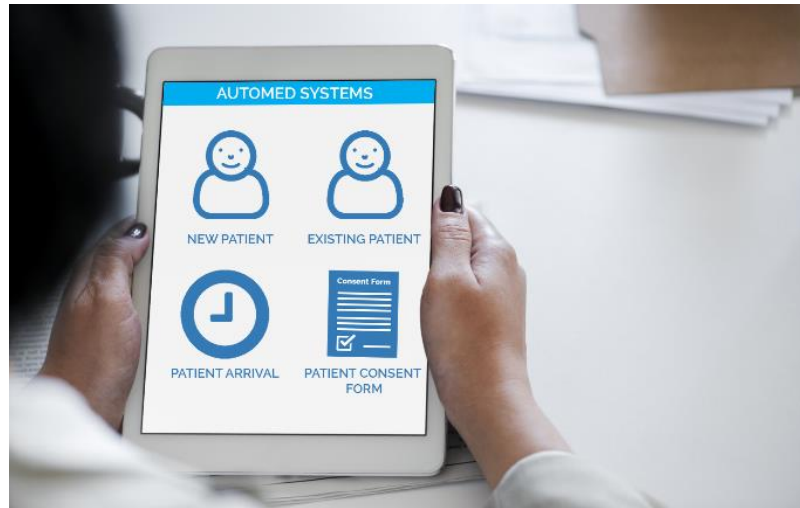
Link to Caller ID triggered SMS

- ✓ An Appointment booked via Caller ID with a linked consent form will trigger an SMS with a URL link to the patient for the form to be completed and submitted.
- ✓ The Appointment Book Audit Tool can be used to check incoming forms and trigger a Reminder SMS with the URL link to complete the form.

Requires AutoMed's SMS Services and Caller ID to be active.

Concierge

- ✓ The Concierge Service is Hosted “In House” on any BYO Android / Apple Device.
- ✓ The Service requires the Tablet device/s to be purchased by the clinic.
- ✓ There is No limit on tablet devices.



Concierge

- ✓ Via the tablet, New and Existing patients can complete their Registration or update their Demographic record in a user-friendly wizard-type format, by means of a PIN based file upload mechanism negating duplicate records, keeping data current, and providing privacy.
- ✓ The patient can move back and forth between the screens using the Back and Next Buttons.
- ✓ The Patient Arrival feature provides a visual summary to reception staff of the patients due to arrive in the next hour, providing access to data requiring updating as well as outstanding accounts.

Concierge

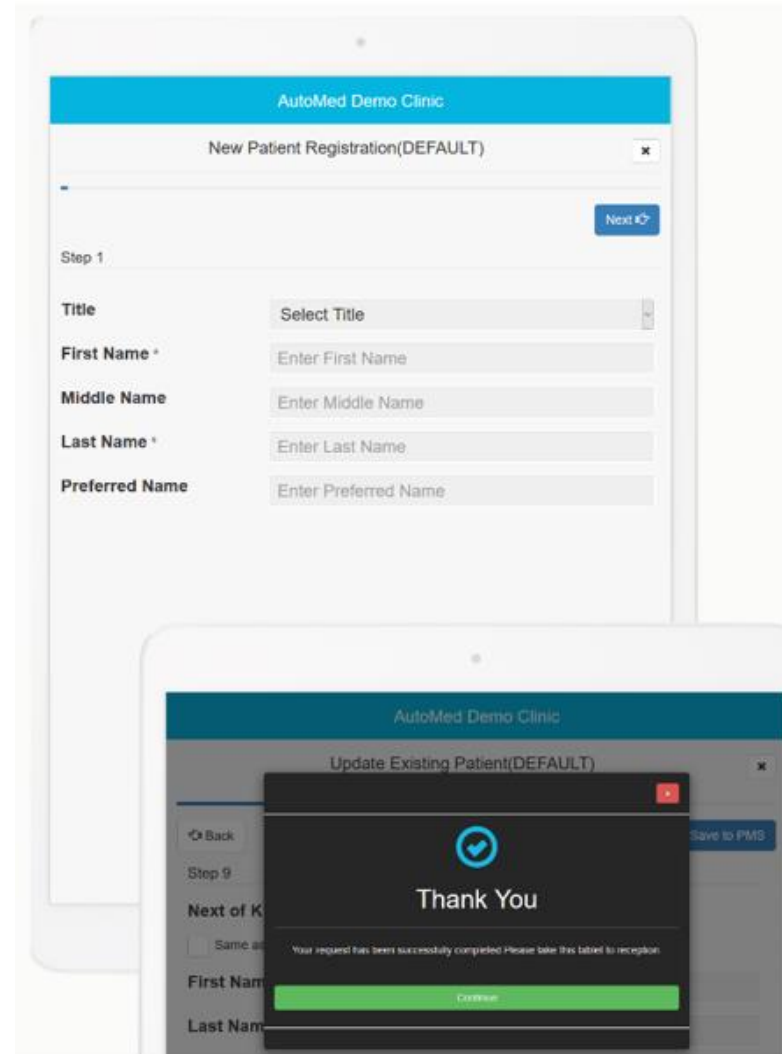
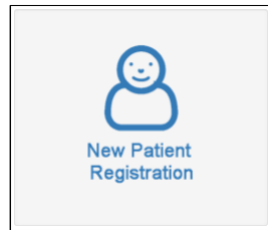
- ✓ The Service enables:
 - New Patients “Walk- in” to complete the New Patient Registration.
 - New Patient “Booked Appointment” to complete their New Patient Registration via the “Update Existing Patient” tab as they already have a Patient file created.
 - Existing patients to update their information.
 - Consent Forms can also be loaded and accessed.
 - Consent forms can be checked for completion.
Used for SMS forms triggered via Caller ID
 - Patient Arrival via Reception.
Used at Reception desk or a Concierge Floor Walker etc.



Concierge

New Patient - “Walk In”

- ✓ The New Patient Arrival will take the patient through the entire Registration form including SMS Consent and ending with acceptance of the Clinic Terms and conditions and the patients Signature.



AutoMed Demo Clinic

New Patient Registration(DEFAULT)

Next

Step 1

Title Select Title

First Name * Enter First Name

Middle Name Enter Middle Name

Last Name * Enter Last Name

Preferred Name Enter Preferred Name

AutoMed Demo Clinic

Update Existing Patient(DEFAULT)

Back

Step 9

Next of K

Same as

First Name

Last Name

Save to PMS

Thank You

Your request has been successfully completed. Please take this label to reception.

Continue

Concierge

New Patient - “Booked Appointment”

- ✓ Users MUST use the Existing patient Tab for Booked Patients as a Patient ID has been created from in Best Practice / PracSoft.
- ✓ The system is clever and once the first 9 questions are answered, the patient can continue with the New Patient Registration

TIP: Users can also access this option via Patient Arrival – select Patient from the list.

The screenshot shows a web interface for 'AutoMed Demo Clinic' with a window titled 'Update Existing Patient'. It features a 'Next ID' button in the top right. Below a 'Step 1' indicator, there are input fields for 'Patient Record No.' and 'PIN', with a 'Load Patient' button. The main form contains several fields: 'Title' with a dropdown menu, 'First Name', 'Middle Name', 'Last Name', and 'Preferred Name', each with a corresponding text input field.

The screenshot shows a 'New Patient Registration' form. It includes a signature capture area with the instruction 'PLEASE SIGN WITH YOUR FINGERTIP ON THE LINE BELOW.' and a 'Reset Signature' button. Below this, a blue bar contains the text 'PLEASE TAKE THIS TABLET TO RECEPTION AFTER SIGNING ABOVE THANK YOU'. At the bottom, there is a section for 'FOR RECEPTION STAFF ONLY' with a masked PIN field and a 'Verify Patient Details' button.

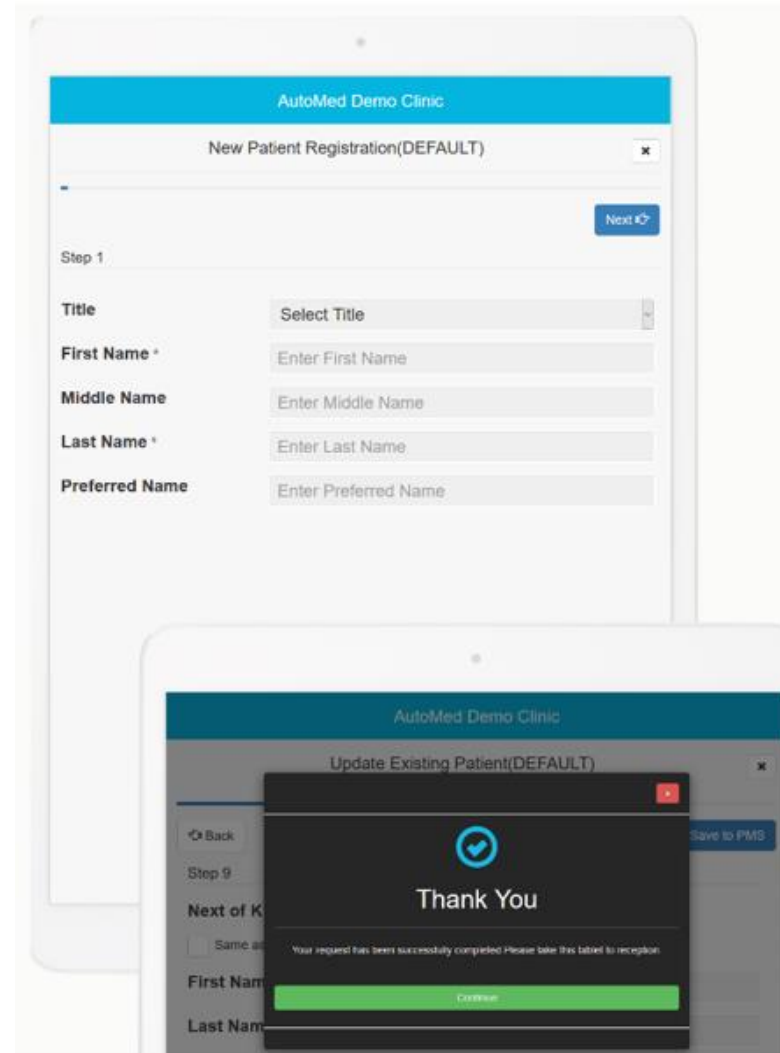


Concierge

Existing Patient

- ✓ Existing Patients are loaded onto the tablet Device and are then able to view their existing details as per their PMS record and edit or add details using the keypad on the device.

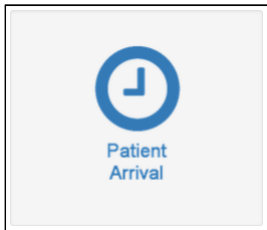
TIP: Users can also access this option via Patient Arrival – select Patient from the list.



Concierge

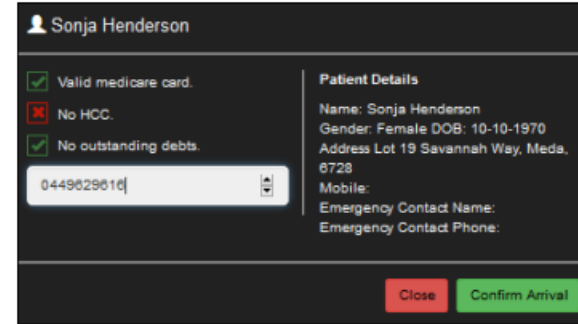
Patient Arrival

- ✓ The patient arrival interface provides reception staff with a mobile tool for arriving patients whilst performing all the same verification checks as the AutoMed kiosk; however, it is NOT a Check-in Kiosk.
- ✓ All Patients both Existing and New with a booking (excludes walk-ins) that are still due to arrive as at that time and are due to arrive within the next hour are displayed on the screen with their appointment times and also a flag regarding consent forms.



Concierge

Demographic Data



The screenshot shows a patient information form for Sonja Henderson. It includes a header with the patient's name, a list of status checks (Valid medicare card, No HCC, No outstanding debts), a text input field with the number 0449629610, and a Patient Details section with fields for Name, Gender, DOB, Address, Mobile, Emergency Contact Name, and Emergency Contact Phone. At the bottom, there are 'Close' and 'Confirm Arrival' buttons.

Sonja Henderson	
<input checked="" type="checkbox"/> Valid medicare card.	Patient Details
<input checked="" type="checkbox"/> No HCC.	
<input checked="" type="checkbox"/> No outstanding debts.	Name: Sonja Henderson
<input type="text" value="0449629610"/>	Gender: Female DOB: 10-10-1970
	Address Lot 19 Savannah Way, Meda, 6728
	Mobile:
	Emergency Contact Name:
	Emergency Contact Phone:
	<input type="button" value="Close"/> <input type="button" value="Confirm Arrival"/>

- ✓ Those patients that are “late” as per the configuration are marked in red and can be “arrived” at the receptionist’s discretion.



- ✓ On selecting a patient, their details as per their PMS record are displayed to the staff member which they can use to verify the patient’s demographic information.
- ✓ If any of the patient’s data has changed the “Update Patient” button will open the patients record and the information can be updated and saved.

Concierge

Medicare and HCC Data

- ✓ The patient's Medicare and HCC details are indicated as either valid with a tick, and as not entered and/or expired with a cross.
- ✓ If no details are registered, it is up to the receptionist's discretion as to whether to proceed to arrive the patient without the details

The image shows two side-by-side screenshots of a patient information form. The left screenshot is for Eva Davis and the right is for Jason Ahern. Both forms have a dark background with white text and icons.

Eva Davis

- Valid medicare card.
- No HCC.
- No outstanding debts.
- Enter Mobile No. [input field]

Patient Details

Name: Eva Davis
Gender: Female DOB: 02-05-1979
Address 502 Lion Pl, Macquarie, 2014
Mobile:
Emergency Contact Name:
Emergency Contact Phone:

[Close] [Confirm Arrival]

Jason Ahern

- Valid medicare card.
- HCC card is expired.
- No outstanding debts.
- Enter Mobile No. [input field]
- send SMS consent.

Patient Details

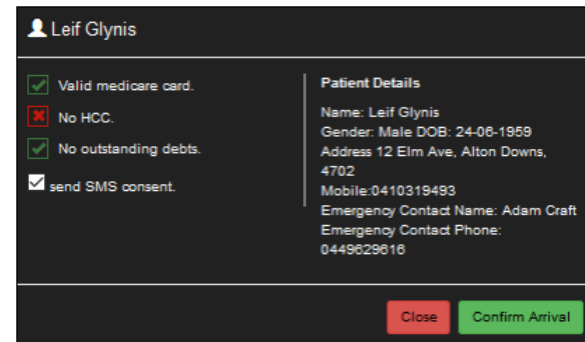
Name: Jason Ahern
Gender: Male DOB: 31-05-1977
Address 17 Seymore Ave, Bentleigh, 3204
Mobile:
Emergency Contact Name:
Emergency Contact Phone:

[Close]

Concierge

SMS Consent

- ✓ If patients have not previously consented to SMS communication, they can be prompted to do so on the tablet.
- ✓ Patient's whose consent is already recorded on the PMS will not be prompted by this message.



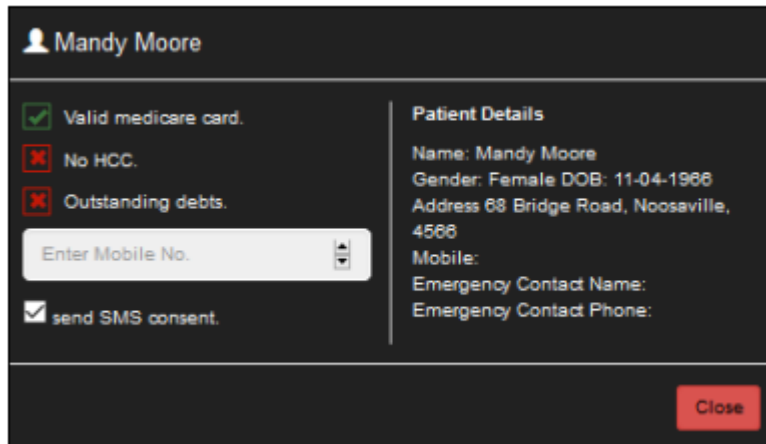
The screenshot shows a patient consent form for Leif Glynis. The form is divided into two columns. The left column contains four items, each with a checkbox: 'Valid medicare card.' (checked), 'No HCC.' (unchecked), 'No outstanding debts.' (checked), and 'send SMS consent.' (checked). The right column is titled 'Patient Details' and contains the following information: Name: Leif Glynis, Gender: Male, DOB: 24-06-1959, Address: 12 Elm Ave, Alton Downs, 4702, Mobile: 0410319493, Emergency Contact Name: Adam Craft, and Emergency Contact Phone: 0449629610. At the bottom right of the form, there are two buttons: 'Close' (red) and 'Confirm Arrival' (green).

Leif Glynis	
<input checked="" type="checkbox"/> Valid medicare card.	Patient Details Name: Leif Glynis Gender: Male DOB: 24-06-1959 Address 12 Elm Ave, Alton Downs, 4702 Mobile: 0410319493 Emergency Contact Name: Adam Craft Emergency Contact Phone: 0449629610
<input type="checkbox"/> No HCC.	
<input checked="" type="checkbox"/> No outstanding debts.	
<input checked="" type="checkbox"/> send SMS consent.	
<input type="button" value="Close"/> <input type="button" value="Confirm Arrival"/>	

Concierge

Outstanding Invoices

- ✓ If patients have outstanding invoices, they can either be directed to a billing kiosk to make payment before they can be arrived or referred to reception to make payment arrangements and be “arrived” from there.

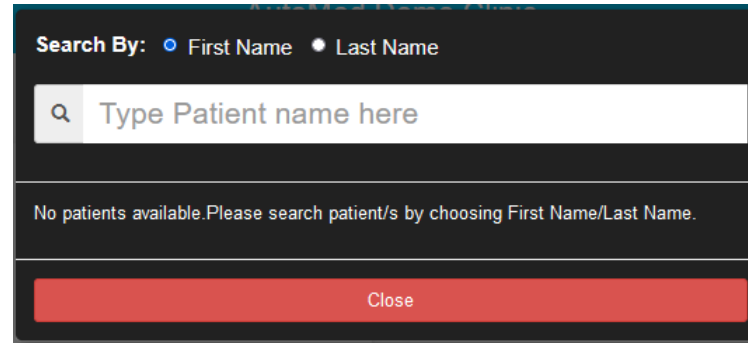


The screenshot shows a patient information form for Mandy Moore. The form is divided into two main sections: a left-hand section for status and consent, and a right-hand section for patient details. The left section includes a list of items with checkboxes: 'Valid medicare card.' (checked), 'No HCC.' (unchecked), 'Outstanding debts.' (unchecked), and 'send SMS consent.' (checked). There is also a text input field for 'Enter Mobile No.' with a clear button. The right section is titled 'Patient Details' and contains the following information: Name: Mandy Moore, Gender: Female, DOB: 11-04-1966, Address: 68 Bridge Road, Noosaville, 4566, Mobile: (empty), Emergency Contact Name: (empty), and Emergency Contact Phone: (empty). A red 'Close' button is located at the bottom right of the form.

Mandy Moore	
<input checked="" type="checkbox"/> Valid medicare card.	Patient Details Name: Mandy Moore Gender: Female DOB: 11-04-1966 Address 68 Bridge Road, Noosaville, 4566 Mobile: Emergency Contact Name: Emergency Contact Phone:
<input type="checkbox"/> No HCC.	
<input type="checkbox"/> Outstanding debts.	
<input type="text" value="Enter Mobile No."/> <input type="button" value="clear"/>	
<input checked="" type="checkbox"/> send SMS consent.	
<input type="button" value="Close"/>	

Concierge

Consent Forms - Ad Hoc



Search By: First Name Last Name

🔍 Type Patient name here


No patients available. Please search patient/s by choosing First Name/Last Name.

Close

- ✓ Staff tap on Patient Consent Form Icon.
- ✓ A patient search function opens when selecting the Patient Consent Form option .
- ✓ The User can select First or Last Name for the search and start entering the characters and the Concierge will search and bring up the patient/s .
- ✓ Choose from the dropdown list of consent forms and select **Sign Consent**.
- ✓ The relevant form will open, with the relevant details and with the signature Line at the base.
- ✓ Patient will complete the relevant information and then Sign and Submit.

Concierge

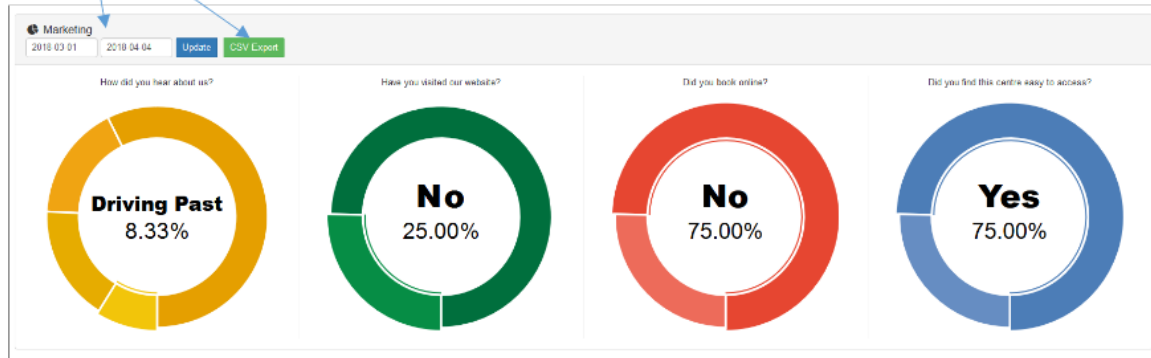
Check Consents

- ✓ Staff can check if Consent has been completed by checking patient Arrival when the patient arrives.
- ✓ Users will see the patients that have completed consent with a  Consent Signed.
- For those that have not been completed and submitted, they are flagged to Sign Consent.
- The User can click on the patient's name and open the form for the patient complete the consent on the spot.

🕒 12:30PM	👤 James Hunt	👤 Dr. Simon Lim	✅ Consent Signed
🕒 12:30PM	👤 Craig Atkins	👤 PFIZER1	✅ Consent Signed
🕒 12:30PM	👤 Amy Nicholson	👤 PFIZER2	🕒 Sign Consent
🕒 12:36PM	👤 Lampini Mytilinos	👤 PFIZER2	✅ Consent Signed
🕒 12:42PM	👤 Deborah Davidson	👤 PFIZER2	✅ Consent Signed
🕒 12:42PM	👤 Matthew O'Brien	👤 PFIZER1	🕒 Sign Consent
🕒 12:48PM	👤 Lisa Laxton	👤 PFIZER2	✅ Consent Signed
🕒 12:48PM	👤 DAINA PENMAN	👤 PFIZER1	🕒 Sign Consent
🕒 12:54PM	👤 Christian Eckberg	👤 PFIZER2	✅ Consent Signed
🕒 12:54PM	👤 Kristie Stubbs	👤 PFIZER1	✅ Consent Signed

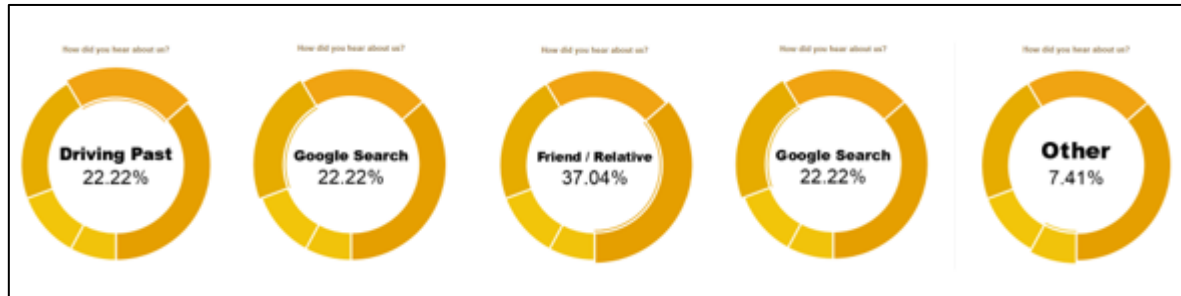
Marketing Information

- ✓ If your practice has elected to ask new patients marketing related questions, the information will automatically save to your Online Dashboard Screen.
- ✓ Scroll to the bottom of the page.
- ✓ The information will be displayed graphically.



Marketing Information

- ✓ By clicking on the various segments, you can view the responses.



- ✓ A From and To field allows you to select the period you are interested in, and the results can be exported for further analysis.

The image shows a user interface for marketing information. It features a header with a gear icon and the word 'Marketing'. Below the header, there is a date field containing '2021-06-09', a 'Date to' field, an 'Update' button, and a 'CSV Export' button.