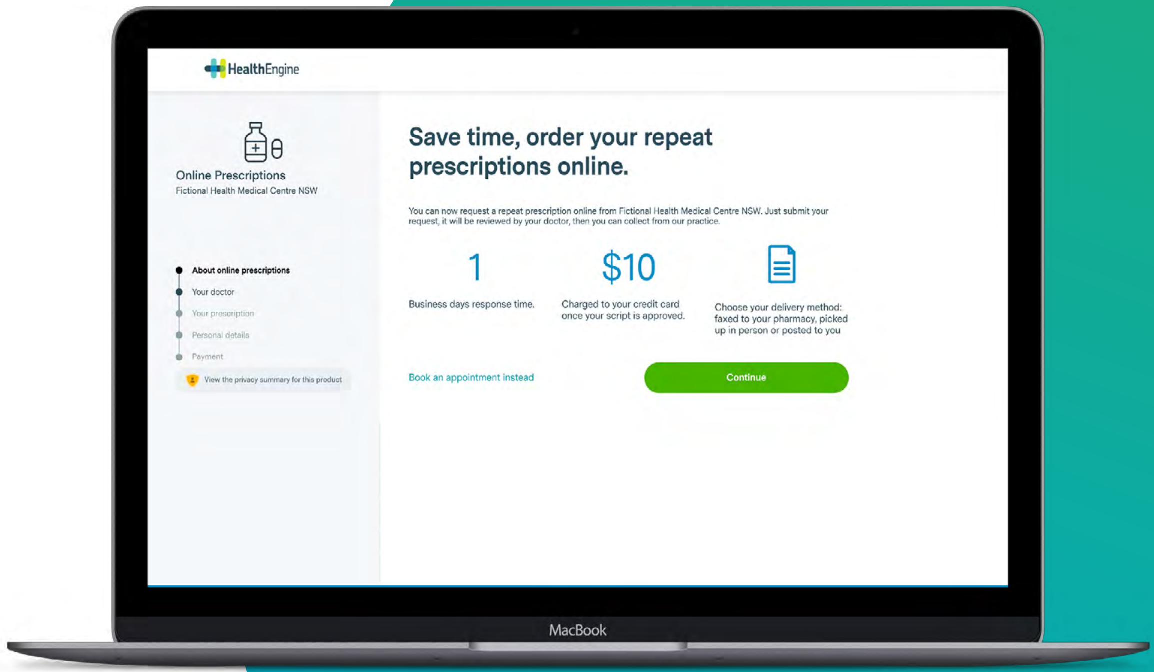
Scripts User Guide

Save time and improve patient satisfaction with HealthEngine Scripts

HealthEngine Scripts allows your patients to request repeat prescriptions online 24/7, saving them time while freeing up your front desk and improving efficiency.

It's fully customisable so you're in control of setting your script pricing, response times, delivery options and managing prescription approvals.

Meanwhile we take care of secure payments and keeping your patients up to date about their script request on your behalf. Best of all, we don't charge your practice any transaction fees.



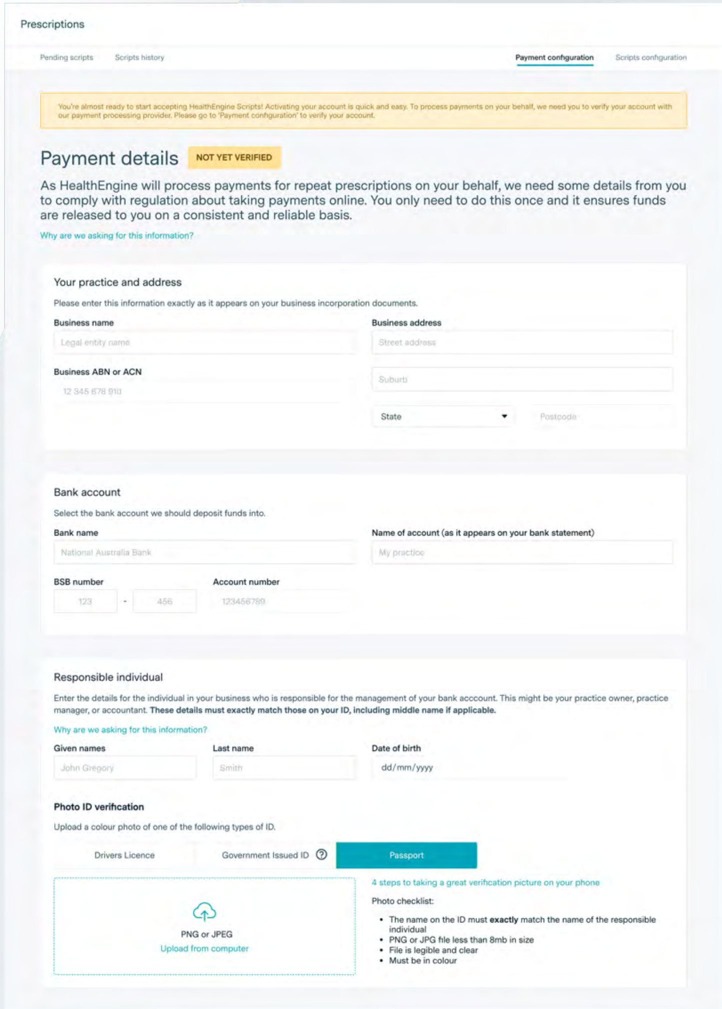
Setting up Scripts

Setting up HealthEngine Scripts for your practice is simple and easy. You'll need to get set up to receive payments and configure your Scripts settings. Just login to Practice Admin and go to **Care → Scripts.**

Step 1: Setting up payments

HealthEngine Scripts uses leading payment platform Stripe to process secure payments for online scripts on your behalf. To receive direct payments, your practice will need to create and verify an account with Stripe.

This is necessary to comply with 'Know your Customer' (KYC) financial regulations in Australia, which require payment providers such as Stripe to collect and maintain information on all account holders.

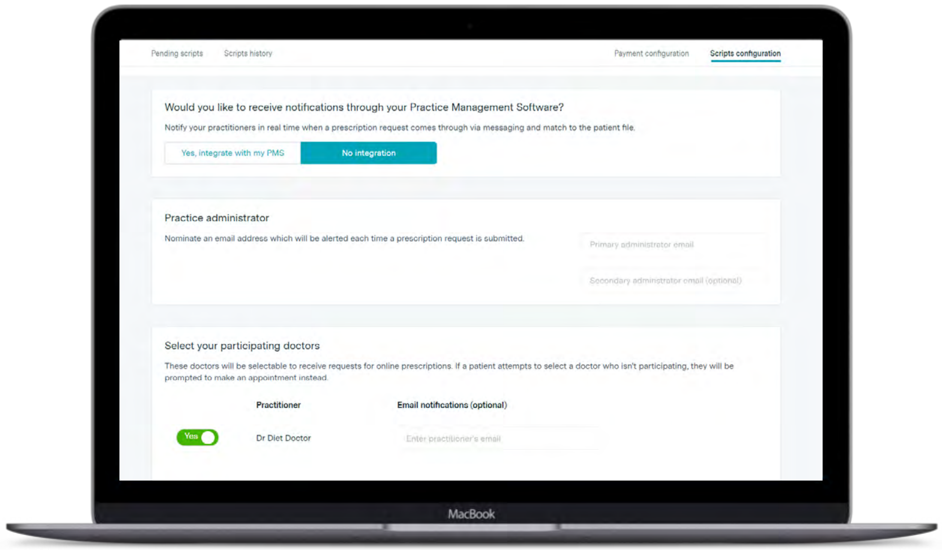


- Click **'Payment Configuration'** in your Scripts dashboard.
- Enter your practice's business name, address and ABN or ACN details.
- Enter your practice's bank account details.
- Enter your 'responsible individual' details – the person who manages your practice bank account.
- Upload photo ID for 'responsible individual' to verify your account – use a passport or driver's license under 5MB in size.
- Review and accept the relevant HealthEngine and Stripe legal agreements.

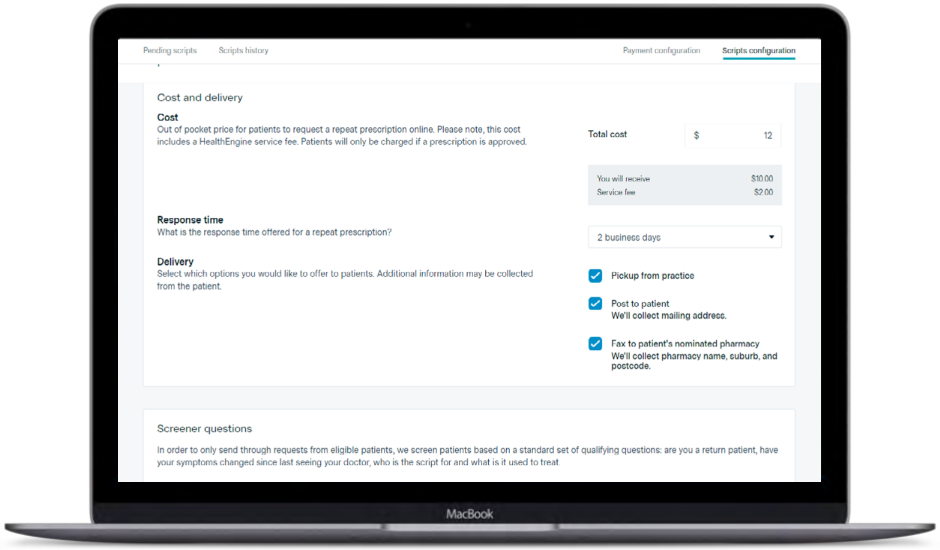
It should only take you around 10 minutes to set up payments. However, once your Photo ID is uploaded, it can take up to 48 hours for your identity to be verified with Stripe. Once complete, your status will change from 'not yet verified' to 'verified' in the 'Payment Configuration' dashboard.

Step 2: Configuring scripts

HealthEngine Scripts gives you full control to customise online prescriptions to best suit your practice. You set the price, response times and delivery options and even choose which practitioners can offer and approve online prescription requests.



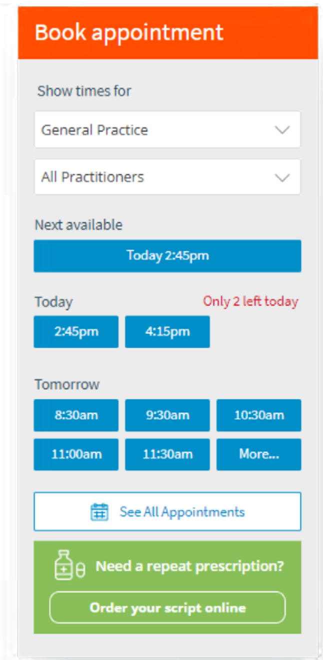
- Click **‘Scripts Configuration’** in your Scripts dashboard.
- **Integrate with PMS.** Choose whether you’d like to receive notifications through your Practice Management Software (if eligible).
- **Choose Practice Administrator.** Nominate an email address to get notified of incoming prescription requests.
- **Select participating doctors.** Toggle ‘yes’ or ‘no’ alongside the doctor’s name, and add their email address (optional) to notify them directly about online script requests.
- **Set cost, response time and delivery.**
  - **Cost**: Set the total price to charge patients. Note patients are charged a flat $2 service fee to cover HealthEngine’s administration costs, such as transaction and SMS fees. For example, if you set the total cost to $12, your practice will receive $10 and HealthEngine will receive $2.
  - **Response time:** Choose from as little as 1 business day to 3 days. This indicates how long a patient will have to wait for their prescription to be reviewed and ready for collection.
  - **Delivery:** Choose from pick-up at practice, post to patient or fax to patient’s nominated pharmacy. You can offer all three.
  - **Optional screening question:** Choose whether you’d like to screen patients based on when they last saw a doctor at your practice, in addition to our standard set of qualifying questions. We’ll redirect patients to book an appointment if they haven’t attended the practice during the timeframe you’ve set.



Step 3: Accepting online scripts

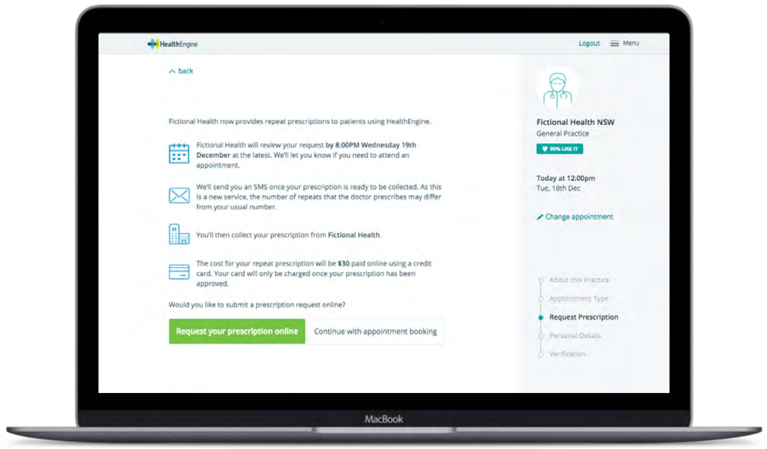
Scripts integrates with your HealthEngine online booking system, which means you can make online prescriptions available via your HealthEngine Profile and practice website.

- **HealthEngine Profile:** If you have a HealthEngine Profile with a Patient Match subscription, we'll automatically add online repeat prescriptions to your profile.



- **Practice website:** You can add our 'online scripts' button or link to your practice website. You'll need to either add custom URL or HTML code to your website. Refer to our **Help and Support Centre** for instructions.

- **Booking form:** If an existing patient selects 'prescription' as an appointment type in the online booking form, we'll also give them the option to request a repeat prescription online.



Using Scripts

Once Scripts is up and running, you can easily keep track of incoming script requests via your email inbox or PMS notification. You'll need to use Practice Admin to approve or reject script requests, and view your scripts and payments history.

1. Review incoming script requests

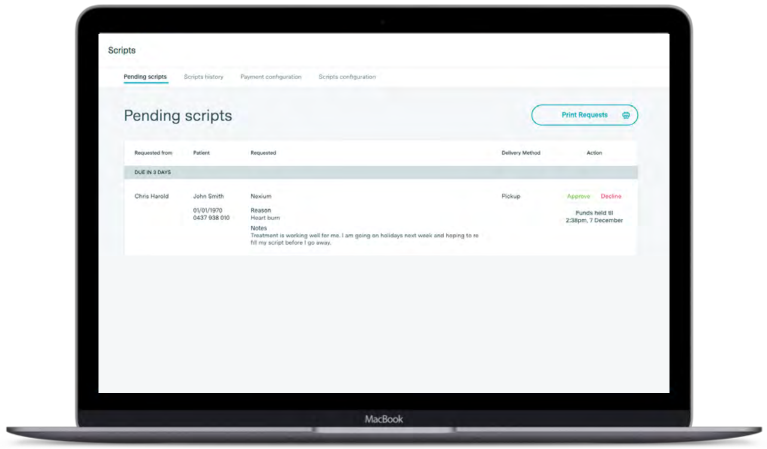
HealthEngine will send you email notifications and/or a PMS notification to let you know when a patient requests a prescription.

- To add, remove or update email addresses, head to your **Scripts → Scripts configuration settings.**
- To view and print all pending scripts requests, go to **Scripts → Pending scripts**.

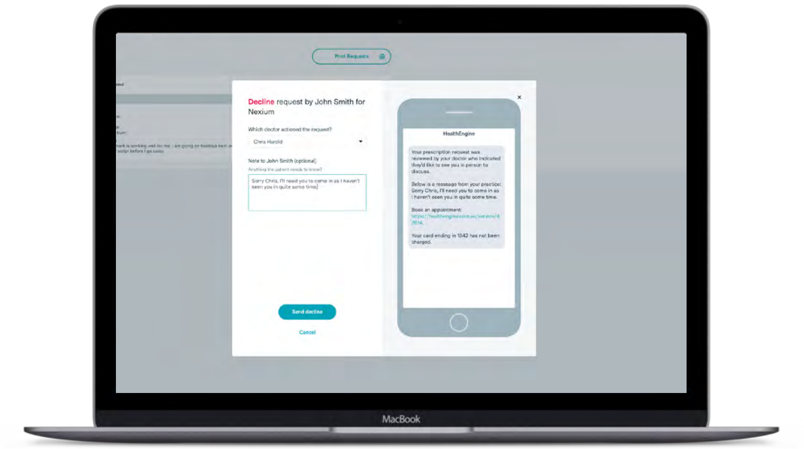
2. Approving or declining script requests

To approve a request:

- Go to **Scripts → Pending Scripts.**
- Click the **'Approve'** button.
- **Select the doctor who approves the request** – use the drop down menu in the approval pop-up. This helps you track which doctors will need to be paid if you have a revenue sharing scheme at your practice.
- **Customise the SMS to the patient (optional)** – you can preview our default message and write additional comments such as general advice or instructions for medication.
- **Click 'send approval'** – patients will receive an SMS notifying them that their script is ready.



To decline a request:



- Go to **Scripts → Pending Scripts.**
- Click the **'Decline'** button.
- **Select the doctor who declined the request** - use the drop down menu in the decline pop-up.
- **Customise the SMS to the patient (recommended)** - you can preview our default message and write additional comments to let the patient know why their request was declined.
- **Click 'send decline'** - patients will receive an SMS notifying them that their request has been declined. It will also include a link to your Online Booking System to prompt them to book an appointment with a doctor.

To process an expired script request:

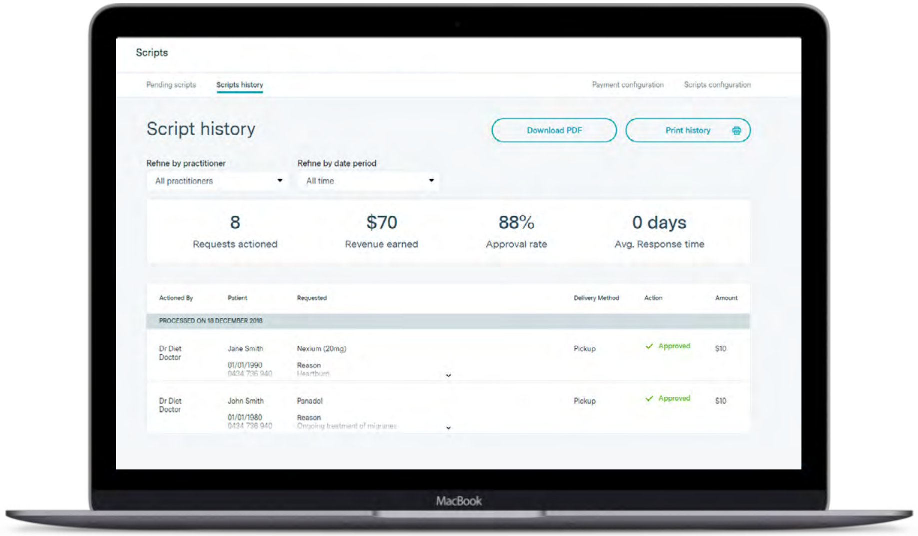
Script requests which have not been approved or declined for 7 days will automatically 'expire'. We'll refund and notify the patient that their practice has not gotten back to them in time, and advise them to either call or book an appointment.

Expired requests will remain in 'Pending scripts' until you move them over to 'Scripts history'. We do this so that you can get in touch with the patient and ensure they receive their medication.

- **Click the 'Move to history' button** - modal will pop-up explaining what has happened.
- **Click 'Move to history' in the modal** - the request is now moved to 'Scripts history" view.

3. Tracking scripts and payment history

Your practice will be paid for any approved script requests on a monthly basis on the last day of the month. You can view your payments history by going to **Scripts → Scripts history.** Once you've been paid, you'll notice the 'paid' status and date alongside any approved Script requests.



To download a PDF of your scripts payment history:

- **Select 'refine by date period'.** You can choose from all time (default option), or filter by current or last month, quarter, or financial year.
- **Select 'refine by practitioner'.** You can choose from 'all practitioners' (default option) or select a practitioner.
- **Select 'download PDF'.** Select 'download PDF' button. Change the 'destination' to 'save as PDF'.

Making Scripts a Success

To make Scripts a successful service for your practice, it's important to offer the right price, reasonable turnaround times, flexible delivery options, and have a seamless internal workflow to manage requests.

Here are some handy tips and considerations to help you get the most out of HealthEngine Scripts.

Setting the right pricing

Getting your price right can make all the difference to your online script volumes and patient satisfaction. While you understand your patients best, our extensive research has found that $10 to $15 is the "sweet spot" that the majority of patients are willing to pay, including those that are bulk billed. However, this doesn't necessarily mean that patients won't pay more. Privately billed patients may be willing to pay up to $30.

When setting your price, we recommend that you weigh up:

- Whether your patients are largely bulk billed or privately billed
- How valuable this service is for your patients
- How much time and effort it will save your practice staff
- Whether it will improve your patient experience
- What you charge for script requests over the phone

Delivering fast reponse times

‘Response Time’ indicates how long your patient will need to wait to get their script approved. While online script requests offer patients more convenience, it’s still important that your practice responds to requests in a timely manner. Some prescriptions requests may be urgent, so patients will need to consider the wait times before they decide to order online.

Even if your practice is particularly busy, you’ll always have at least 1 full business day to respond to the patient. Our insights show that the majority of patients find response times of 1 to 2 business days acceptable.

Providing flexible delivery options

Our survey insights*[1] show that patients using online prescriptions want a choice of delivery options. Over 50% said pick up from practice is their prefered delivery method, while nearly 40% preferred to have it faxed to their local pharmacy.

It’s important to be flexible and offer multiple delivery options to meet a range of patient needs. Post may still be a great option for patients that live far away from your practice or have mobility issues.

Consider the following for each option

- **Pickup from Practice:** Ask for the patient’s ID upon collection. Remember, the patient has already paid through HealthEngine, so you do not need to charge them.
- **Post to Patient:** Mail out prescriptions to the patient’s chosen address.
- **Fax to a nominated Pharmacy:** Send the prescription to the location that the patient specified upon ordering. The patient will need their ID when they pick up their prescription from that pharmacy.

[1] November 2018 survey of selected patients using HealthEngine Scripts

Managing the Scripts workflow

Finally, it's important that you set up a workflow to manage script requests effectively within your practice. Consider the following when determining the right process.

Managing incoming requests / notifications

- Will one person be responsible for receiving and co-ordinating all script requests within the practice?
- How will doctors be notified of requests? Will they be notified by email, PMS messenger or will you print requests to give to them in person?

Managing approvals and declines

- When will your doctors review requests?
- How often will you track pending requests in Practice Admin to make sure that response times are being met?
- Will the doctor approve or decline the request directly in Practice Admin? Or will your front desk, nurse or practice manager manage this on their behalf?
- What happens when a doctor is away and cannot meet the response time? Is your practice flexible with having other doctors approve requests on their behalf whilst they are away?

Script distribution

- How much time will you set aside each day if you need to fax or mail approved scripts?
- Will you have a separate tray for online scripts and telephone scripts so you know which patients to charge?

Managing payments

- Who will download the scripts payment history every month to give to your accounts team for payment reconciliations?
- Do you need to have a billing record in the PMS?

Here are a couple of example workflows:

Doctor manages process end-to-end

1. Doctor receives script notification in PMS or via email
2. Doctor reviews and approves/declines script in Practice Admin
3. Doctor writes script and gives it to front desk

Front desk/nurse and doctor manage process

1. Front desk/nurse or practice manager receives all script notifications in PMS and/or via email
2. Front desk/nurse or practice manager prints out request or uses PMS to notify doctor
3. Doctor reviews and approves/declines script request in Practice Admin
4. Doctor writes script and gives it to front desk

Front desk/nurse manages process end-to-end

Front desk/nurse or practice manager receives all script notifications in PMS or via email

Front desk/nurse or practice manager prints out request or uses PMS to notify doctor

Doctor reviews script request and delivers script to front desk or practice manager

Front desk/nurse or practice manager approves or declines request in Practice Admin on the doctor's behalf

Frequently Asked Questions

NOTE: For any additional frequently asked questions regarding HealthEngine Scripts, please refer to the **Help and Support** section in Practice Admin.

a) Payments

Why do I need a 'Responsible Individual' to set up payments?

Australia has strict laws when it comes to paying out funds to individuals and companies. These are typically known as "Know Your Customer" (KYC) regulations.

"Know Your Customer" (KYC) obligations require our payment provider (Stripe) to collect and maintain information on all account holders. These requirements come from Stripe's regulators and financial partners, and are intended to prevent abuse of the financial system.

We need to collect details on:

- The individual creating the Stripe account
- The business associated with the Stripe account
- Any individuals who ultimately own or control that business

If you'd like to learn more about this legislation, **click here.**

b) Security

Is Stripe a secure payment platform?

HealthEngine uses Stripe, a leading global payment provider, to process payments for Scripts. Stripe has been audited by a PCI-certified auditor and is certified to PCI Service Provider Level 1. This is the most stringent level of certification available in the payments industry. This helps ensure that transactions are fast, reliable, safe, and easy to use.

- 100,000+ businesses use Stripe to power their transactions
- Millions of people benefit from Stripes services
- $50B+ handled by Stripe annually

c) Troubleshooting common issues

Why does my payment verification keep getting rejected?

Verification for practices is managed by our payments provider **Stripe**. Failing verification the first time isn't uncommon or anything to worry about so here are the most common reasons for verification fails.

- **Incorrect details.** The details you have entered about the responsible individual do not match the ID document which you uploaded. These must match exactly as Stripe will scan the document you uploaded and verify the first name, last name and Date of Birth.
- **Incorrect Photo ID requirements.** Stripe allows you to upload either a Driver license, Government issued ID such as a firearm license or a Passport. Ensure you select the correct tab in Practice Admin as they have different requirements. Passports only require a single image to be uploaded but Driver's licenses require both the front and back of the license to be uploaded separately.
- **Poor image quality.** Ensure that the photo of your ID is readable. Stripe uses machine learning to scan your ID. See below on how to ensure your image is of a high enough quality.

Photos must be:

- In colour
- In PNG or JPG format and
- be less than 5MB in size