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To set up the Enduring Assignment of Benefit (AoB) workflow in **Best Practice (Bp Premier)**, you need to configure your communication templates and manage patient consent flags.

Follow these step-by-step instructions to integrate the policy into your system.

Step 1: Add the Automated Notification Templates

For the Email Template:

1. Go to **Setup > Word Processor Templates**.
2. Click **New Template** (or click *File > New* inside the word processor).
3. Paste the email text provided in the previous message.
4. Replace the bracketed text with Bp Premier **Fields** (from the right-hand panel):
 - o [Patient Full Name] → Use **Patient > Full Name**
 - o [Service Date] → Use **Visit > Date of Visit**
 - o [Practitioner Name] → Use **User > Full Name**
 - o [MBS Item Number/Description] → Use **Billing > Item Code/Description**
5. Save the template as `Enduring AoB Notification`.

For the SMS Template:

1. Go to **Setup > Configuration > SMS**.
 2. Click on **User-defined text** or **Templates**.
 3. Click **Add** to create a new SMS macro.
 4. Title it `AoB_Post_Service`.
 5. Paste the character-optimized text:
"[Practice Name]: Hi \{pt_{f}irst_{n}ame\}, a bulk-billed Medicare claim was processed for your visit on \{visit_{d}ate\}. Item: \{item_{c}ode\}. Benefit Paid: \{benefit_{a}mount\}. No payment is required under your Enduring Agreement. To cancel, call [Phone]."
 6. Save the macro. [
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Step 2: Handle Patient Consent Flags & Form Storage

Currently, Bp Premier handles the Medicare Web Services bulk-bill workflow digitally. To log and store an Enduring AoB for an eligible patient:

1. **Store the Signed Form**
 - **If Paper:** Scan the document. Go to the patient's record, press **F11** (Correspondence In), click **Add**, and upload the file. Categorise it as `Consent Form` and description it as `Enduring AoB Agreement - Signed [Date]`.

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- **If Digital:** If using an integrated platform like HotDoc or Tyro Health, ensure the completed PDF automatically syncs to the patient's **Correspondence In** tab.
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2. Flag the Patient Record

To prevent staff from asking the patient for consent at every subsequent visit:

1. Open the patient's **Demographics** screen (F2).
 2. Use the **Notes** or **Alerts** field to create a clear visual indicator.
 3. **Type:** *ACTIVE ENDURING AOB ON FILE - DO NOT REQUEST SIGNATURE*.
 4. Check the box to make it a **Pop-up Alert** when opening the file, or a **Billing Alert** so the billing team knows consent is already taken care of.
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Step 3: Billing Workflow for Reception

When processing the bulkbill claim at the end of the consult:

1. Open the **Billing** screen (F4).
2. Select the relevant MBS items.
3. When the Medicare online claiming window appears asking for assignment of benefit consent, select **"Written"** or **"Electronic"** (depending on how your system is mapped for enduring agreements).
4. Because the signed document is already securely retained in *Correspondence In*, the practice is fully compliant for the 2-year audit window.