

BING – Patient Correspondence



Digital Health
CONNECTING BEST CARE

Digital Health
Quick Reference Guide

This Quick Reference Guide will explain how to:

1. [Register a user account with EasyPost Mailroom](#)
2. [Send patient's correspondence from iPM](#)
3. [Send patient's correspondence from Electronic Medical Record \(EMR\)](#)
4. [Resending patient's correspondence from EMR](#)
5. [Cancel patient's correspondence from BING Portal](#)
6. [Sending SMS via BING Portal](#)
7. [Running a Report via BING PORTAL](#)

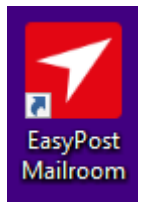
Definitions:

BING – Virtual mailroom used at Western Health to send patient's correspondence via text messages or post.

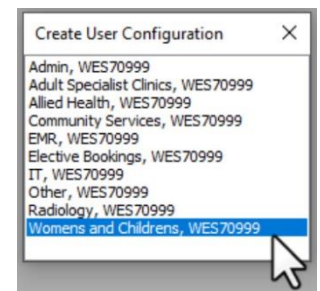
EasyPost Mailroom – desktop application to allow users to send patient letters from iPM and EMR.

Registering a User Account with EasyPost Mailroom

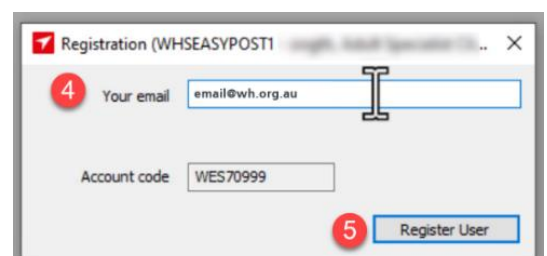
1. Double-click on the EasyPost Mailroom application from your desktop.
2. Click on the **Get Started** button.



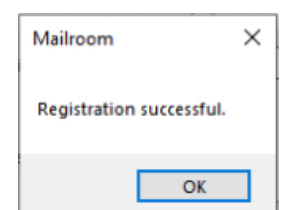
3. From the Create User Configuration window, **select your department**.



4. Enter your Western Health email address.
5. Click the **Register User** button.



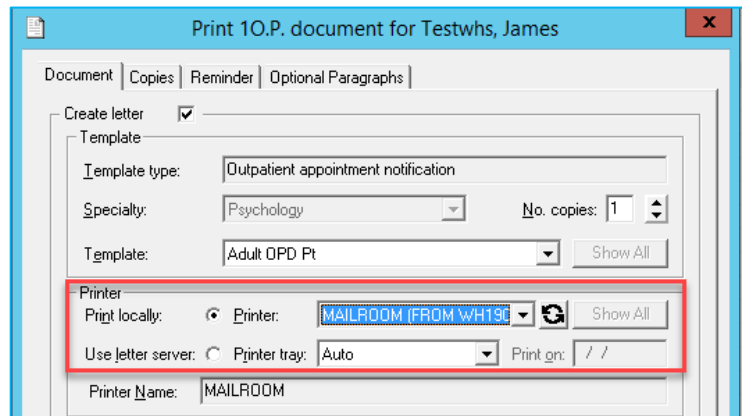
6. Registration successful message displays. Click OK.
You are now registered to use *EasyPost Mailroom*.





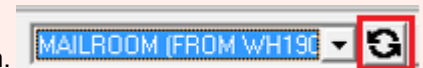
Sending Patient’s Correspondence from iPM

1. Search for your patient’s appointment in **iPM**.
2. Right-click on the appointment row, hover over Documents and select the notification letter you need.
3. Once you have selected the Template you need:
 - Ensure the Printer is set to **MAILROOM**.
 - Ensure the Printer tray is set to **Auto**.



Handy Hint: Missing MAILROOM printer?

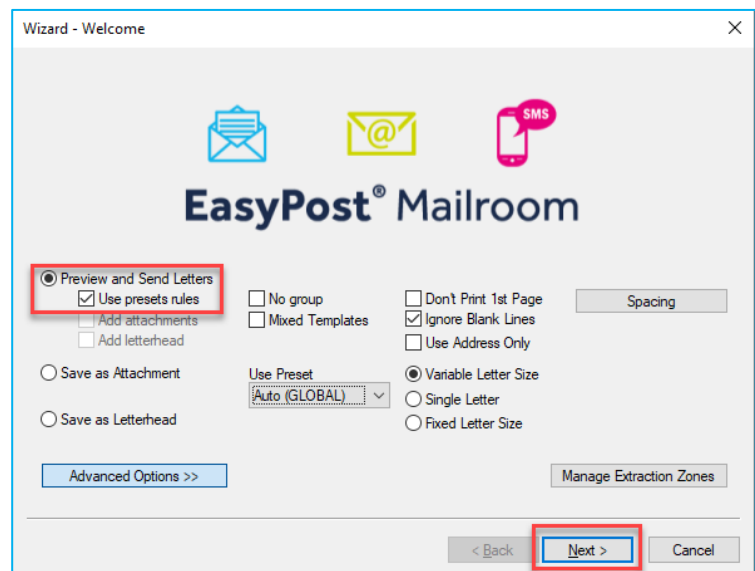
Sometimes “MAILROOM” may not display in the Printer drop down option. Try clicking the refresh button to resolve this issue.



4. Click **OK**.

EasyPost Mailroom wizard displays.

5. Tick **Use presets rules** under **Preview and Sent Letters** option and click **Next**.



Handy Hint: Tick “Use presets rules” option.

Ticking the “Use presets rules” tells the system to process your patient letter based on the presets that has been set up by Western Health (for example, where in the template is the patient’s address extracted from).

The Mailroom View displays a preview of the patient’s correspondence.

The *Email*, *Department*, *Colour* and *Profile* information will be pre-populated for you.

In the **TO** field, ensure the following three options are available in the drop-down options:

- SMS
- Postal
- Reference



SMS – Mobile number

- The mobile number is pulled from the *Mobile* field in *iPM*. If a patient does not display, check *iPM* and add the patient’s mobile number.
- If the patient does not have a mobile number, the notification will be sent via postal.

Address 160 Gordon St, Footscray, VIC, Australia, 3011							Phone	
Patient ID	Patient Name (D)	Alternate ID's	Sex	Date of Birth	Address	Phone	Mobile Phone ...	
1613163	Testwhs, James	Medicare N/A	Male	03/07/2022	160 Gordon St, Footscray, VIC, 3011>	0406449665	0422<	



Postal - Address

- If the patient does not have a mobile phone, the correspondence will be sent via *BING* to their postal address.
- Make sure to send all postal letters via *BING* to guarantee a delivery of six business days (as opposed to nine business days with Australia Post).

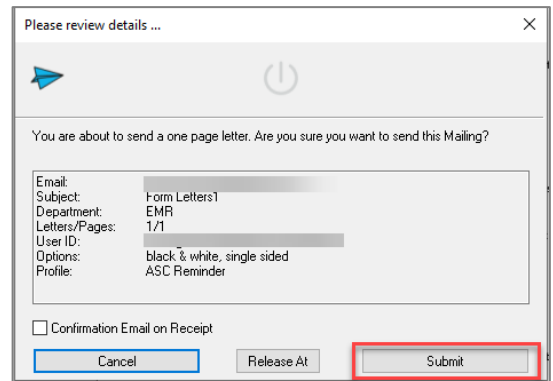
6. Select **Submit**.



7. Review the information in the *Review* window and click **Submit**.

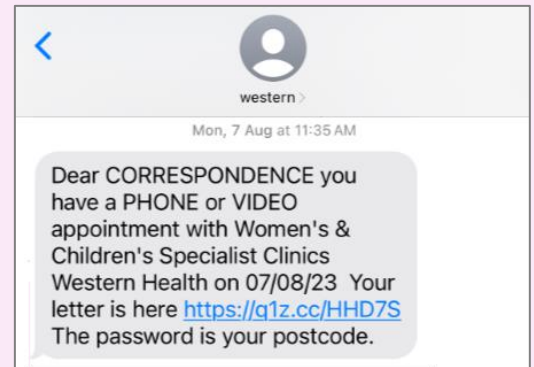
8. An electronic receipt of your action displays.

Click **OK** to close the window.



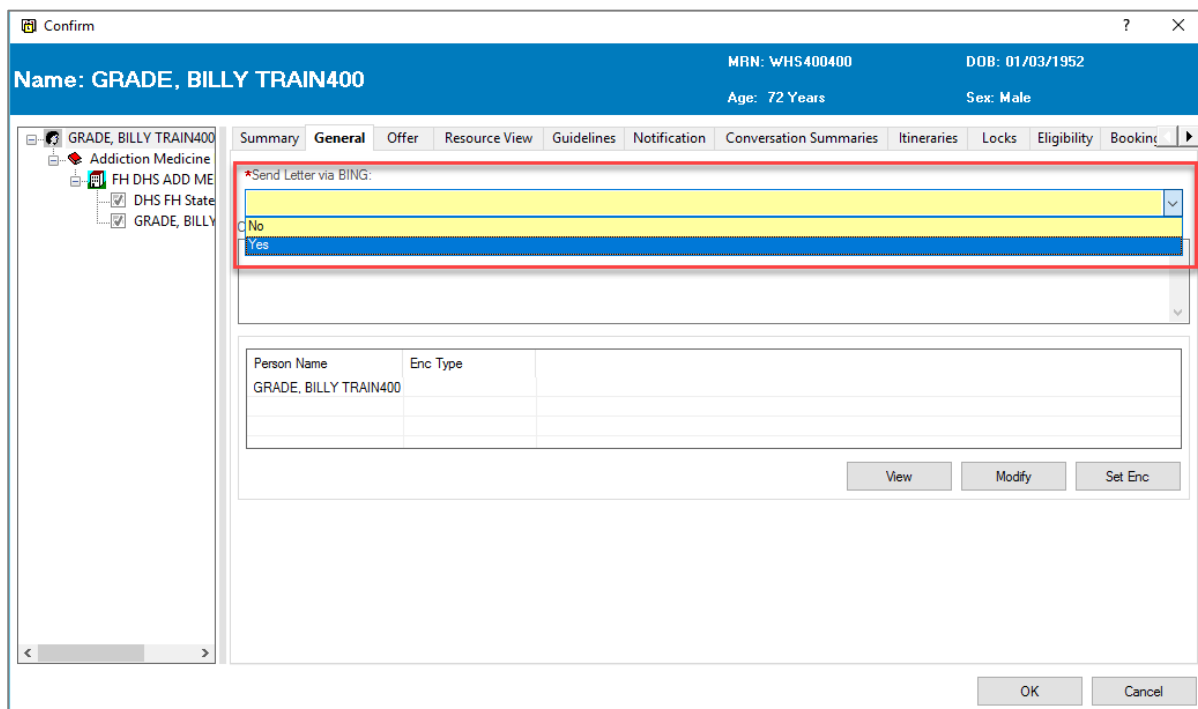
Text Message

- If the correspondence letter was sent via SMS, the patient will need to click on the link provided and enter their postcode to view the letter.
- If the patient did not open the link **within 12 hours**, a postal letter will be mailed to the patient's address.



Sending Patient's Correspondence from EMR

1. Schedule an appointment from *Scheduling Appointment Book* on the EMR.
2. The *Confirm* window displays. Select **Yes** to the "Send Letter via BING". The system will automatically send a letter to the patient in the background.




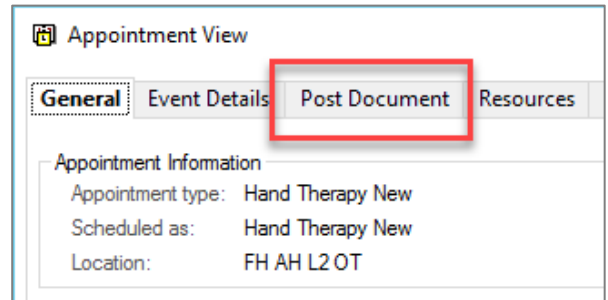


Reprinting Patient's Correspondence from EMR

1. Find the correspondence letter through one of the following options:

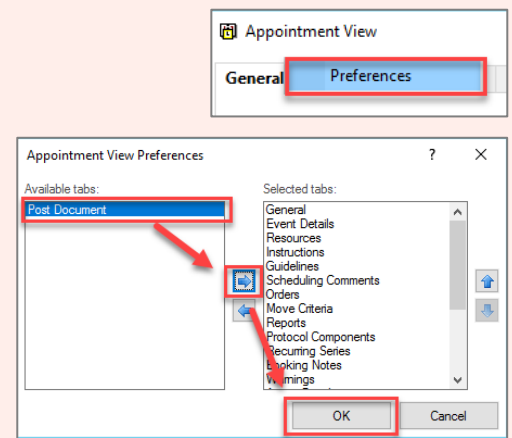
From Scheduling Appointment Book

- a. Open **Appointment Inquiry** icon 
- b. Search for the patient's appointment history.
- c. Double-click on the relevant appointment to open **Appointment View**.
- d. Navigate to **Post Document** tab to display all correspondence related to this appointment.



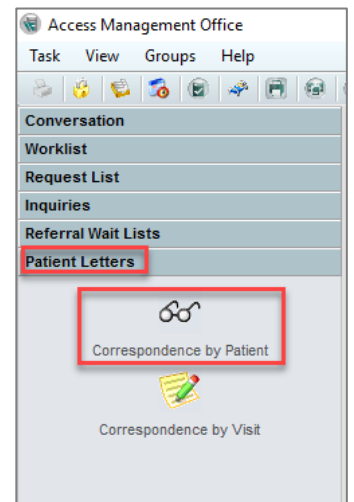
Handy Hint: Missing Post Document Tab?

1. Right-click on **Appointment View** window
2. Select **Preferences**
3. Move "Post Documents" from the **Available Tabs** to the **Selected Tabs**
4. Re-sequence the tabs order if needed.
5. Click **OK**



From PM Office

- e. Select **Patient Letters**.
- f. Select **Correspondence by Patient**.
- g. Search for the patient.



2. A list of relevant letters display. Double-click on the letter you want to send.

Use **Document Create Date Time** and/or **Document Type Code** column to identify the relevant letter.

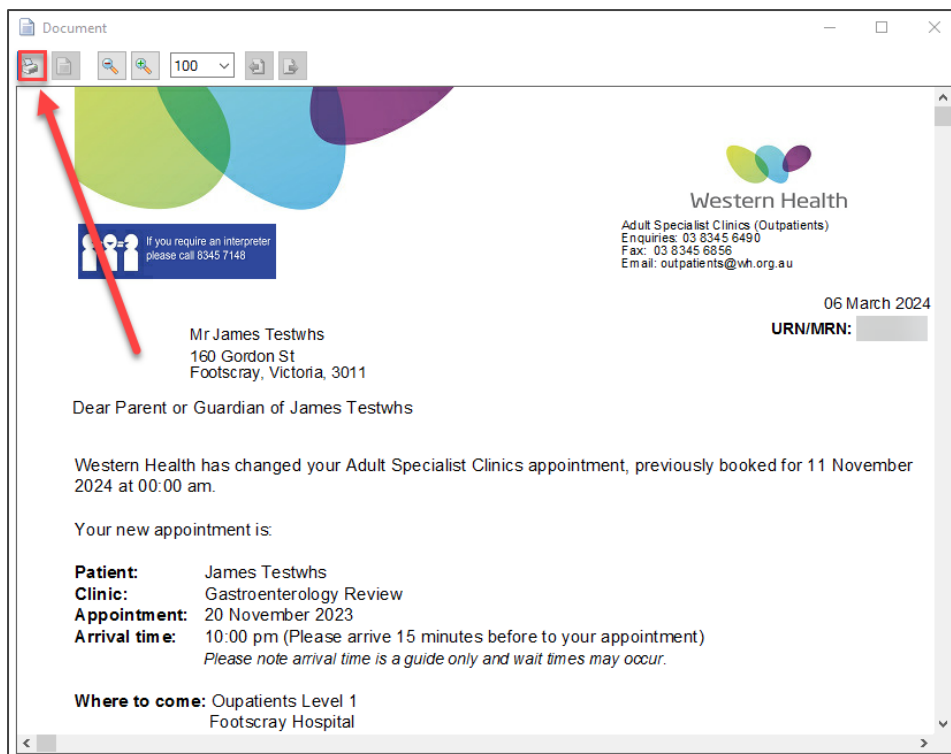
The screenshot shows the 'Appointment View' window with the 'Post Document' tab selected. A table of Post Documents is displayed with the following columns: Post Document Id, Parent Entity Id, Parent Entity Name, Document Type Code, Document Layout, Document Create Date Time, Document Create User, Print Date, and Manual Create Indicator. The 'Document Type Code' and 'Document Create Date Time' columns are highlighted with red boxes.

Post Document Id	Parent Entity Id	Parent Entity Name	Document Type Code	Document Layout	Document Create Date Time	Document Create User	Print Date	Manual Create Indicator
445665604	14336721	SCH_EVENT	OP - Appt Resch NP	OP_RSCH	10/04/2024 14:51	15025056		No
445647543	14336721	SCH_EVENT	OP - Appt Conf NP	OP_CONF	27/03/2024 14:53	15025056		No

See below table for description of **Document Type Code**.

Document Type Code	Description
OP – Referral Acknowledgement	Sent to patient after Referral Status/Priority is Triage Required
OP – Referral Rejection	Sent to patient after Referral Status/Priority is Rejected and Reason for Removal status is added in the Referral WL Removal conversation
OP – Referral Rejection – GP	As above but sent to GP
OP – Added to Waitlist	Sent to patient referral is triaged and patient is in a Waiting Status with Referral Status/Priority being *Waitlist Routine < X days
OP – Appt Conf	Sent to patient once appointment has been Confirmed
OP – Appt DNA – Discharge Letter	Sent to patient after No Show and Discharge from consultant’s care
OP – Appt DNA – Discharge Letter – GP	As above but sent to GP
OP – Appt DNA – Reschedule Letter	Sent to patient after No Show and the rescheduled appointment is confirmed
OP – Appt Cancel Pending Follow Up	Sent to patient after appointment cancellation upon Patient Request with an outcome of Appointment to be made at a later date
OP – Appt Cancel Discharge	Sent to patient after appointment cancellation and Discharge from consultant’s care
OP – Appt Cancel Discharge – GP	As above but sent to GP
OP – Appt Resch	Sent to patient after appointment rescheduled and confirmed upon Patient Request
OP – Removed from Waitlist	Sent to patient after WL Removal, Referral Status/Priority is Removed not Rejected
OP – Removed from Waitlist Hospital – GP	As above but sent to GP

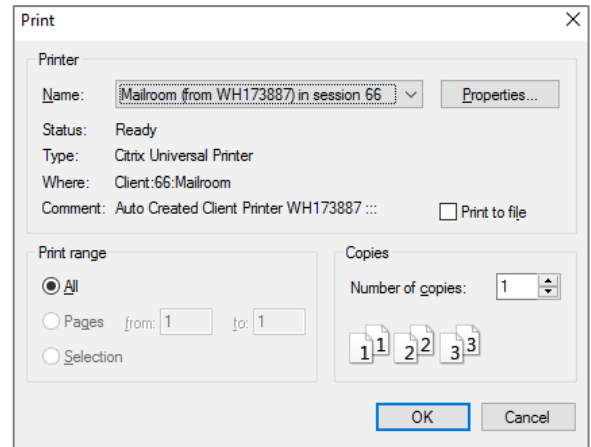
- Click **Print** icon and follow the prompts to complete the printing process.





- From the Print window, select **Mailroom** printer name and click **OK**.

EasyPost Mailroom window displays. **Follow Steps 5 – 8 from Page 2 – 4 of this QRG.**

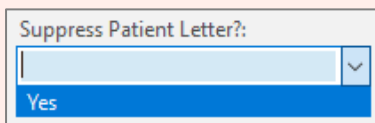


Handy Hint

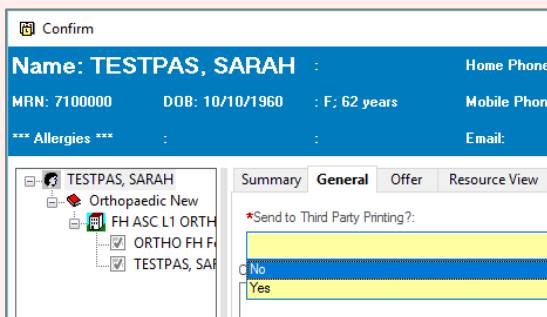
If **NP** appears next to the **Document Type Code**, the document was not printed when triggered. Correspondence will always be generated when triggered, but the user determines whether it is printed.

To stop letters from automatically printing:

In the **Referral Add/Modify** window: select **Yes** to *Suppress Patient Letter?*



In the **Appointment Confirmation** window: select **No** to *Send Letter via BING?*





Cancelling a Correspondence from BING Portal

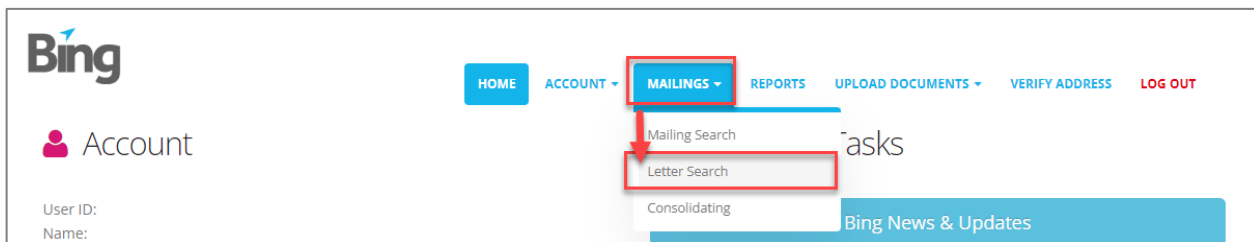


Cancelling Notification Grace Period

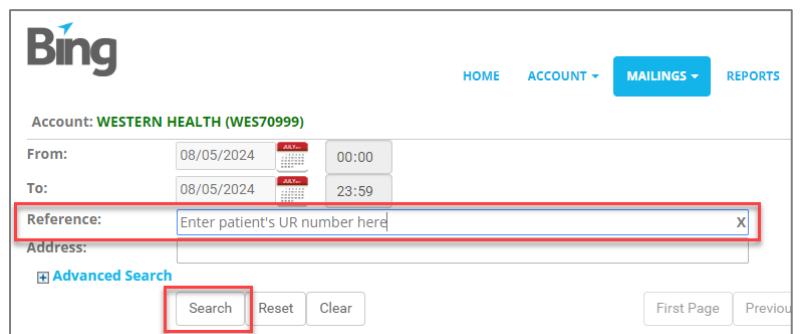
You have **15 minutes** to cancel the correspondence from being sent to the patient, from the time you press 'Submit'.

Option 1: Cancelling by Letter Search

1. Log into the BING portal online via https://portal.bingmail.com.au/signin_to_bingmail
2. From the **Mailings** tab, select **Letter Search** (Search by URN).

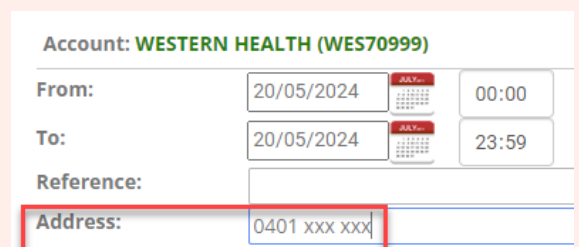


3. From the Search field, enter the patient's URN in the **Reference** field and click **Search**.



Handy Hint: Reference field does not return patient's history

Sometimes, the Reference field may not return your patient's correspondence history. Alternatively, find your patient's correspondence history by searching for their mobile number in the *Address* field.





All notifications sent to the patient will display in the Search Result.

3. Find the mail you would like to cancel and click on the **Actions** button.
4. Select **View Mailing** option.

Select All on Page		Clear selection	
#	Pages	Address	
<input type="checkbox"/>	1	1	Patient's mobile number
<input type="checkbox"/>	2	1	Patient's address
<input type="checkbox"/>	3	1	Patient's mobile number

Actions

Download Letter

View Mailing

Actions



Handy Hint: Address Column

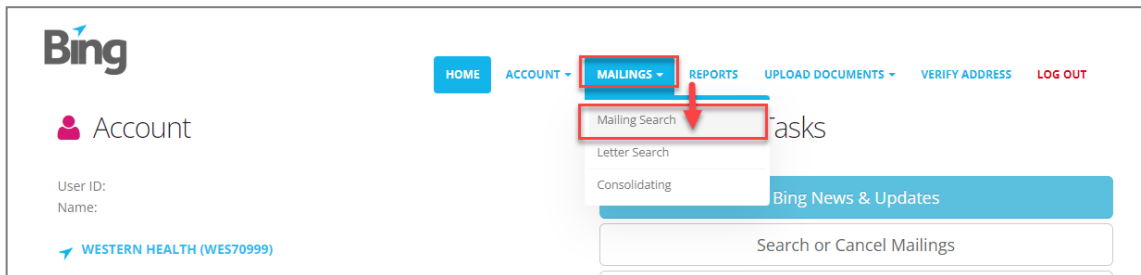
In the **Address** column:

- If a **mobile number** is displayed, this notification was sent via SMS.
- If a **postal address** is displayed, this notification was sent as a letter via post.

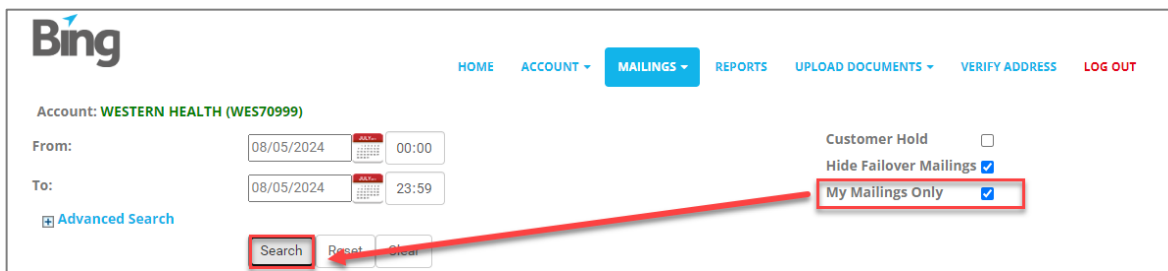
Follow Step 5 onwards from the next page

Option 2: Cancelling by Mailing Search

1. Log into the BING portal online via https://portal.bingmail.com.au/signin_to_bingmail
2. From the **Mailings** tab, select **Mailing Search**



3. Check **My Mailings Only** and click **Search** to only display correspondence you have actioned.



4. The system will display the selected correspondence sent to the patient.

Account: WESTERN HEALTH (WES70999)

From: 08/05/2024 00:00 To: 08/05/2024 23:59

Customer Hold
Hide Failer Mailings
My Mailings Only

Search Reset Clear

Subject/Title	Received	Mailing ID	Department	Letters	Price(exGST)	Actions
Form Letters1	08 May 2024 10:09	RTTWGG	EMR	1	\$1.90	⏸
EMF document	29 Apr 2024 11:03	GVQ2DQ	Adult Specialist Clinics	1	\$0.20	
pmdoc_3782103294_dat_tmp_0308121648-job_2680870	08 Mar 2024 12:29	PR7Y23	EMR	1	\$0.20	



Handy Hint: Colours of Notification rows

- **GREEN** highlighted mailings can still be cancelled within the 15 minutes grace period.
- **GREY** highlighted mailings have been cancelled.
- **BLUE** highlighted mailings have been lodged (sent to the patient) and cannot be cancelled.
- **RED** highlighted mailings can no longer be cancelled but not been lodged.

5. Click on the **Actions** tab and select **Cancel**.

Subject/Title	Received	Mailing ID	Department	Letters	Price(exGST)	Actions
Form Letters1	08 May 2024 10:09	RTTWGG	EMR	1	\$1.90	⏸

Cancel

Send Reminders Now


Cancel Reminders

6. Enter a **Cancel Reason** and click **Yes**.

7. A confirmation of cancellation displays. Click **OK** to close the window.



Handy Hint: Viewing Mailing Status

Click on the  icon next to each notification to view the status of the correspondence in more details.

1. Status

- **Cancelled** – Letter was cancelled.
- **Submitted** – Letter was submitted, and the user has a 15 minutes grace period to cancel if required.
- **Lodged** – Letter was sent to patient.

2. **Received** – Date and time the letter was sent to BING.

3. **Doc 1st or Last Retrieved** – Date and time the patient has opened the text message.

4. **SMS Message** – The text message sent to the patient.

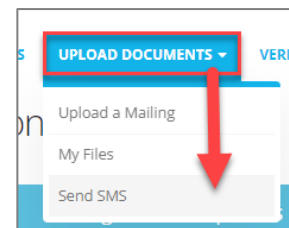
Note: If the patient did not click on the link received via text message **within 12 hours**, a correspondence will be sent via postal mail. This postal correspondence will display as another item in the search result.

#	Pages	Address							
<input type="checkbox"/>	4	1	Patient's phone number						Actions
Mailing ID:		F733WP	Index:	1	2	Received:	26/03/2024 12:57:12		
Status:		Lodged	1			Price:			
Pages:	1		Mono Imps:	1		3	Doc 1st Retrieved:	26/03/2024 13:13:27	
Envelope:	DLX		Colour Imps:	0			Doc Last Retrieved:	26/03/2024 13:13:27	
Reference(s):	1613163		Custom Data:	reference: 1613163					
Extracted address:	profile:department:Adult Specialist Clinics organization: Area:Adult Specialist Clinics Mr James Testwhs			sms_text: Dear James you have an appointment at Adult Specialist Clinics Wester...					
				password: 3011					
				apptdate: 01/02/24					
				clinic: 13:15					
Primary Address (sms):									
Recipient:									
SMS Status:	delivered								
Sender:	Western								
SMS message:	4	Dear James you have an appointment at Adult Specialist Clinics Western Health Your letter is here https://q1z.cc/NZ8Qh The password is your postcode.							



Sending SMS via Patient Portal

1. Log into the BING portal online via https://portal.bingmail.com.au/signin_to_bingmail
2. From the **Upload Documents** tab, select **Send SMS**.



The Send SMS screen contains three sections:

3. From the **Destinations** section, enter the patient's mobile number (one per line) in the **Manual Entry** field.
4. OPTIONAL: From the **Linked Document** section, drag and drop a PDF document you would like to insert in the SMS.

From the **Template** section:

5. Enter the message you would like to send in the **Message*** field OR select a pre-saved message template from the **Name** field.

OPTIONAL: If you have uploaded a PDF from the **Linked Document** section, the PDF can be opened by the recipient as a hyperlink from the SMS received. To place the hyperlink in your SMS:

- Place your cursor in the Message body where you would like to place the PDF hyperlink.
- Select the **HYPERLINK** option from the **Data Fields** drop-down menu.
- {HYPERLINK} text displays in the message body to indicate where the PDF link will display in the SMS.

6. Select who the recipient will see as the sender from the **SENDER ID** field.
7. The **Profile** and **Subject/Title** fields are auto populated.
8. Select your department from the **Department List** field.
9. Select **User Login** blue hyperlink to populate your name in the **Confirmation Email To** field. This option will send a confirmation receipt to you. The **Send Confirmation Email** checkbox is automatically ticked.
10. Leave **Hold for Preview** checkbox unticked.
11. Tick **Schedule Release** checkbox to schedule the SMS to be sent later.



Template

Name: ASC Reminder

Sender ID: WESTERN

Data Fields: Insert Data Field

Message: Dear MR BING PORTAL, You have an upcoming appointment at Western Health with Footscray Fracture Clinic on Monday 29th July 2024. Please view your appointment details here: [HYPERLINK](#)

Characters: 194 Segments: 2

Save Template Save Template As Delete Template

Profile: AUTO

Subject/Title: SMS 29/07/2024 09:03

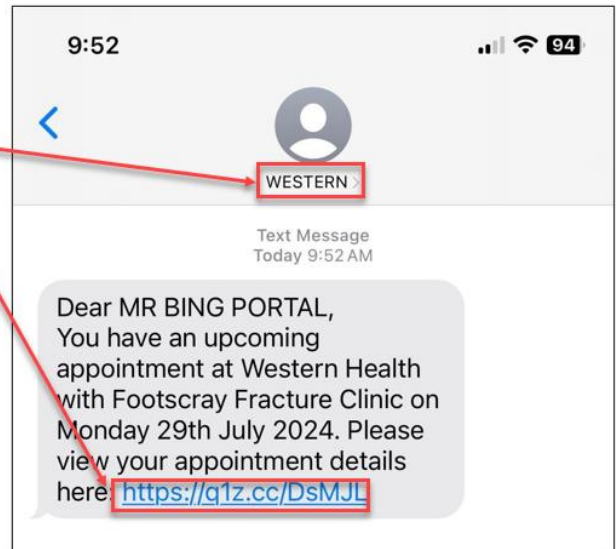
Department List: EMR

Confirmation Email To: [Redacted]

Send Confirmation Email:

Hold for Preview:

Schedule Release:



- When you are ready, click **Submit**.
- A confirmation window displays, click **OK**.



To send SMS to multiple patients using bulk upload:

- From the **Destination** section, drag and drop your recipient's file into the **Drop Zone**. The file you uploaded will display in the right side of the window.

From the **Recipient Column**, select the column containing the recipient's phone numbers. The selected column will be highlighted in green.

Tick the **First Row is Heading** checkbox if this is applicable.

Destinations:

MBS Consents 2024 TRAINING.csv 1.4 KB Remove

Drop Zone

Recipient Column: PT_PH_MOBILE

First Row is Headings:

PT_LAS...	PT_DOB	PT_AGE	PT_S...	F PT_PH...	PT_L...	P...	P...	REF_MBS_C...
Testbmm	9/05/1990	33 Years	Female		English	No	C-U	Not Recorded
TESTBMM	10/07/1995	28 Years	Female		English	No	C-U	Not Recorded
TestBMM	10/07/1995	28 Years	Female		English	No	C-U	Not Recorded

Rows: 1 - 4 of 4 Columns: 30

Browse...

OPTIONAL: From the **Linked Document** section, drag and drop a PDF document you would like to insert in the SMS.

Linked Document: (Optional)

Specialist Clinic Outpatient.pdf 280.7 KB 

- From the **Template** section, select a pre-saved message template from the **Name** field.

The **Message** field is populated.

Template

Name: ASC MBS Consent

Sender ID: Bing shared number pool

Data Fields: Insert Data Field

Message: Dear {PT_FIRSTNAME} ({PT_URN})
You have an upcoming appointment at Western Health on {PT_LANGUAGE}.
You may elect to be bulk billed for your appt if you have a Medicare card. If you choose to be bulk billed for this appt there will be no out-of-pocket costs at WH for services relating to this visit (exc. pharmacy). Further information is available at

Text in the **Message** field containing { } curly braces indicates that the information will be populated from columns in the upload file.

Recipient Column: PT_PH_MOBILE

First Row is Headings:

PT_URN	PT...	PT_FI...	PT_LAS...	PT_DOB	PT_AGE	PT_S...	F PT_PH...	PT_L...
1890823	MRS	ALPHA	Testbmm	9/05/1990	33 Years	Female	401255421	English
1234567	MRS	BETA	TESTBMM	10/07/1995	28 Years	Female	402038223	English
1234567	Mrs	GAMMA	TestBMM	10/07/1995	28 Years	Female	498466975	English

Rows: 1 - 4 of 4 Columns: 30

Template

Name: ASC MBS Consent

Sender ID: Bing shared number pool

Data Fields: Insert Data Field

Message: Dear {PT_FIRSTNAME} ({PT_URN})
You have an upcoming appointment at Western Health on {PT_LA...

OPTIONAL: If you have uploaded a PDF from the **Linked Document** section, the PDF can be opened by the recipient as a hyperlink in the SMS. To place the hyperlink in your message:

- Place your cursor in the Message body where you would like to place the PDF hyperlink.
- Select the **HYPERLINK** option from the **Data Fields** drop-down menu.

Template

Name: ASC MBS Consent

Sender ID: Bing shared number pool

Data Fields: Insert Data Field

Message: Dear {PT_FIRSTNAME} ({PT_URN})
You have an upcoming appointment at Western Health on {PT_LANGUAGE}.
You may elect to be bulk billed for your appt if you have a Medicare card. If you choose to be bulk billed for this appt there will be no out-of-pocket costs at WH for services relating to this visit (exc. pharmacy). Further information is available at 2bhkc. Please reply YES if you understand this and agree to be bulk billed for this visit. Otherwise, please reply NO. **{HYPERLINK}**

{HYPERLINK} text displays in the message body to indicate where the PDF link will display in the SMS.

Destinations:

MBS Consents 2024 TRAINING.csv 756.0 B Remove

Recipient Column PT_PH_MOBILE

First Row is Headings:

PT_URN	PT...	PT_F...	PT_LAS...	PT_DOB	PT_AGE	PT_S...	F PT_PH...	PT_L...	P..
1890823	MRS	ALPHA	Testbmm	9/05/1990	33 Years	Female		English	No

Rows: 1 - 4 of 4 Columns: 30

Linked Document: (Optional)

Specialist Clinic Outpatient.pdf 280.7 KB Remove

Template

Name: ASC MBS Consent

Sender ID: Bing shared number pool

Data Fields: Insert Data Field

Message: (PT_FIRSTNAME) ((PT_URN))

You have an upcoming appointment at Western Health on (PT_LANGUAGE).

You may elect to be bulk billed for your appt if you have a Medicare card. If you choose to be bulk billed for this appt there will be no out-of-pocket costs at WH for services relating to this visit (exc. pharmacy). Further information is available at <https://go.wh.org.au/3g2bhkc>. Please reply YES if you understand this and agree to being bulk billed for your visit. Otherwise, please reply NO.

(HYPERLINK) <https://q1z.cc/DWdN6>

Text Message Today 12:09 PM

+61 447 514 205 >

ALPHA (1890823)

You have an upcoming appointment at Western Health on English.

You may elect to be bulk billed for your appt if you have a Medicare card. If you choose to be bulk billed for this appt there will be no out-of-pocket costs at WH for services relating to this visit (exc. pharmacy). Further information is available at <https://go.wh.org.au/3g2bhkc>. Please reply YES if you understand this and agree to being bulk billed for your visit. Otherwise, please reply NO.

3. Select who the recipient will see as the sender from the **SENDER ID** field.

Handy Hint: Replying back to an SMS



For text messages requiring patient's reply (e.g. MBS Consent), select **Sender ID of Bing shared number pool** to be able to pull patient's response in a report.

Template

Name: ASC MBS Consent

Sender ID: **Bing shared number pool**

Data Fields: Insert Data Field

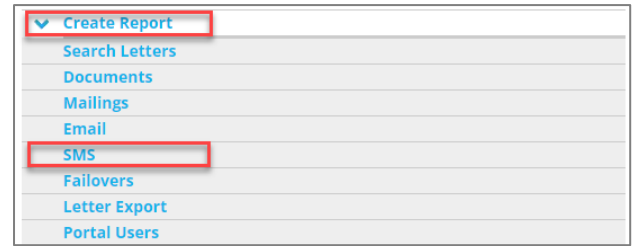
Follow instructions on Page 12 from Step 8 onwards.



Running a Report on SMS Replies from BING Portal

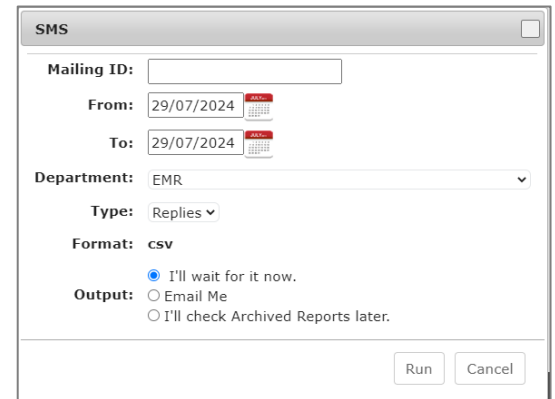
To view patient's reply to SMS sent (e.g. MBS Consent SMS):

1. Log into the BING portal online via https://portal.bingmail.com.au/signin_to_bingmail
2. Select **Reports** tab.
3. Expand **Create Reports** section.
4. Select **SMS** option.



The SMS window displays.

5. Enter your search filters, such as:
 - a. Date ranges.
 - b. Department.
 - c. Type: Select Replies.
 - d. Output: Select I'll wait for it now.
6. Click **Run**.



The CSV file is downloaded.

7. From the CSV file:
 - View the patient's reply from the **Reply** column.
 - Expand the **SMS Text** column to view the SMS sent to the patient, to quickly find patient's name and URN.

N	S
Reply	SMS Text
YES	<p>Dear ALPHA (1890823)</p> <p>You have an upcoming appointment at Western Health on English. You may elect to be bulk billed for your appt if you have a Medicare card. If you choose to be bulk billed for this appt there will be no out-of-pocket costs at WH for services relating to this visit (exc. pharmacy). Further information is available at https://go.wh.org.au/3g2bhkc. Please reply YES if you understand this and agree to being bulk billed for your visit. Otherwise, please reply NO. https://q1z.cc/DWdN6</p>