Shire Dental System

FIRST TRAINING NOTES

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(Up to Version 1.4.6.2 of the dental software)

CONTENTS

DENTAL SYSTEM LOGIN

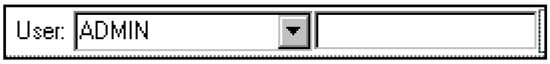
1) Double click the dental system login.

2) **Username**: Type in your username

3) **Password**: Type in your password, if applicable. Passwords are case sensitive.

4) Click **OK**.

The default username of **ADMIN** with no password will be available for selection when your server is first installed to enable you to set up your own usernames (see below for username configuration). This name then appears in the user box at the top of the desktop.



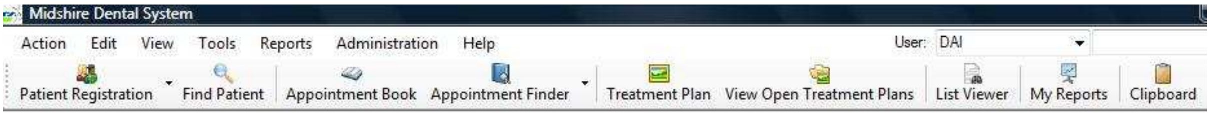
CHANGING USERS

1) Click on the username box and select your user name from the drop down list.

2) Type in a password if applicable.

DATA ENTRY AND NAVIGATION

Toolbar



- Click **Patient Registration** to select your default registration option.
- Click the down arrow to select your alternative registration option.
- Click **Find Patient** to search for an existing patient.
- Click **Appointment Book** to open the appointment book to manually search for an appointment.
- Click **Appointment Finder** to define your requirements and search for the first available slot.
- Click **Treatment Plan** to go directly to charting – you will be prompted to search for and select the relevant patient.
- Click **List Viewer** to display your lists.

PRACTICE DETAILS

Your practice details should be entered as follows:-

1) Select **Practice Details** from the **Administration** menu and complete all relevant fields.

2) If your practice is a dental provider, click the **Provider** box and enter the practice contract number. Otherwise leave this box unticked.

3) When all relevant details have been entered, click **OK**.

USER NAMES AND PERMISSIONS

USER GROUP PERMISSIONS

To create a new user group:-

1) Select the **Manage Groups**/**Users** option from the **Administration** menu.
2) Click **Groups**, type in the name of the group and click the **Create Group** button.
3) Click **OK**.
4) Select the group, click the **List Permissions** button and all permissions will be displayed.
5) Select the permissions for the group and click **Update Group Permissions**.
6) Click **Close** to exit when all of the groups have been created.

Note: To remove a Group, select the group and click the **Remove Group** button but make sure that no users are members of that group before you delete it.

NEW USER NAMES

1) Select the **Manage Groups/Users** option from the **Administration** menu and click **Users**. The screen will default to the **Add New User** option.

2) Select a title from the drop down menu.

3) Type in the **Surname** and **Forename** of the user.

4) Select a fee scale if applicable (optional).

5) Select an appointment room for the user if applicable (optional and can be added later)

6) Enter a username for this user, eg the initials of the user.

7) Passwords are optional. They are case sensitive and can be a combination of letters, numbers and symbols – but not spaces. **User Groups** – click the user group from the list displayed.

8) Click **Add**.

9) Click **OK** when prompted that the user name has been created.

10) Repeat these steps for each user.

EDIT USER NAMES

1) Select the **Manage Groups/Users** option from the **Administration** menu and click **Users** and click the **Edit** box.

2) Select the user name to be edited and make the changes as follows:-

Edit Personal Details

Make the required changes and click **Update**.

Reset a Password

Click the **Change Password** box. Enter and confirm the new password and click **Update**.

REMOVE A USER

Click the **Remove** box**.** Select the user from the drop down box and click **Remove**.

PATIENT DETAILS SCREEN

PATIENT REGISTRATION OPTIONS

There are two patient registration options – Full Registration and Express Registration and one of these will have already been have selected as your default option.

Select whichever registration method you require.

- To select your default registration option, click the **Patient Registration** icon on the toolbar.
- To select your alternative registration option, click the down arrow to the right of the **Patient Registration** toolbar and click on the option required.

FULL REGISTRATION

Fields coloured yellow and marked with a red asterisk must be filled in. As you complete these must-fill fields, the asterisk will be removed from the display.

Move between the fields by pressing the tab key or by clicking with the left mouse button.

Family Name	Type in a family name – usually the surname.
Title	Select a title from the drop down menu.
Active Patient	Leave the tick in this box to indicate that this patient is an active patient.
First Name	Complete as appropriate.
Surname	Complete as appropriate.
Previous Name	Optional - a married woman's maiden name can be stored in the previous name field.
Sex	The sex field will default if linked to a title. Otherwise, select from the drop-down list.
DOB	The date of birth can be selected by using the drop down calendar or entered manually.
NHS Number	Complete as appropriate.
Insurance Plan Number	
Address	The address can be typed in manually or entered using the postcode quick entry facility.
Home Address/Work Address	Click as applicable.
Ethnicity	Select from the drop down list.
General Notes	General notes about the patient can be stored in this field.
Future/Previous Appointments	Previous and future appointments are displayed automatically at the bottom of the patient details screen.

Home Phone Mobile Phone Work Phone	Enter the relevant telephone numbers. Click the box alongside the mobile phone number if the patient would like a text message reminder when the next check-up is due.
Additional Contacts	Click the **+** button and enter the contact name and number. Click **OK**. Add further contacts in the same way.
Primary E-mail Additional E-mail	Enter an email address if appropriate. Click the box alongside if the patient would like an email reminder when the next check-up is due.
Contact Preference	You can record the patient's preferred method of contact in this field. Select from the drop down list.
Occupation	Optional - complete if required.
Fee Scale	Optional. If you are using the system to enter treatment, you can select the default fee scale that applies to this patient. Select from the drop-down list.
Paying Patient	• If the patient pays for treatment, either Private or NHS, select **Patient not exempt** from the drop down menu. The **Maximum Charge** field will remain inactive. **If the patient is an NHS patient and is:-** • fully exempt from charges - select the appropriate exemption from the drop down menu. • partially exempt from charges – select the appropriate exemption from the drop down menu and type the payment amount in the **Maximum Charge** field.
Default Dentist	Select the usual dentist for this patient from the drop-down list.
Referred By	• A list of referring practices can be maintained on the system and the relevant option displayed in this field. • Alternatively, you could also use this field to record how the patient heard about your practice, eg Yellow Pages.
Position in Family	Select the relevant family position for the patient. If no other family members attend the practice, select **Other**.
Family Members	If family members are linked, all other family members are displayed on each patient's record.
Recall	The recall date can be updated manually or – if you are using the system to enter treatment, it will be automatically updated when a new course of treatment is opened.

- Once the patient details have been completed, click **Register Patient**. If the **Register** Patient remains inactive it is because one of the must-fill fields has not been completed. Check your data entry if this happens.
- Once the record has been saved, you will be prompted that patient registration is complete. Click **OK**.

FAMILY MEMBERS

Add a New Family Member to an Existing Record

1) Display the patient's details and click the **New Family Member** button.
2) Fill in the relevant details and click the **Add to Family** button.
3) You will be then prompted that the family update is complete. The original record will be redisplayed.
4) Repeat steps 1-3 for each family member.

Remove a Family Member

1) Left click on the family member.
2) Right click and select **Delete Family Member**.
3) Click **OK** at the **Are you sure?** prompt.
4) Click **OK**.

Merge Family Members

1) Display the record for one of the family members to be merged and click the **Merge Family** button.
2) You will then be prompted to search for and select the record for the other family member. Both family members will then be displayed.
3) Select the correct family position for each patient.
4) Choose which family name is to be used.
5) Click the **Merge** button.

EXPRESS REGISTRATION

Configure the Express Registration Screen

1) Select the **Patient Registration\Express Registration Mandatory Fields** option from the **Maintenance** menu.
2) Click each option that you would like to be essential fill fields on the express registration screen.

Register an Express Patient

1) Select the **Express Registration** option – see page 8.
2) <u>All</u> of the fields must be completed **-** except the **Notes** field, which is optional.
3) If you add a contact number, select which field it relates to, ie home, work or mobile.
4) When you have completed the entries, click **OK.** The registration will be saved and the partially completed patient details screen will be displayed with the express patient symbol

Note: If you attempt to edit an express patient's details before they attend their first appointment, you will need to complete all of the standard must-fill fields before you are able to save any changes.

SEARCH FOR PATIENT DETAILS

1) Click **Find Patient** on the toolbar.

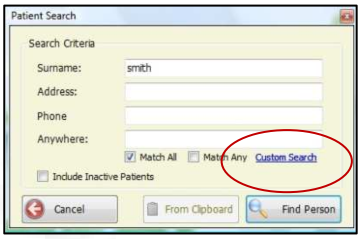
2) Type in the information that you know about the patient.

- The **Surname** field is a beginning with search.
- The **Address** field is a containing search.
- The **Phone** field is a beginning with search. You can type in the phone number without the spaces.
- The **Anywhere** field is a containing search and will search for the data that you have entered where this appears on any field on the client record. You can type in more than one word – leave one space between each word.

Note: You can either use the **Surname**, **Address** and **Phone** fields together **OR** the **Anywhere** field**,** but not both. If you enter anything into the **Anywhere** field, all other entries will be cleared. If you use the **Anywhere** field, therefore, you must type all of the entries in that field, even if one of them is a surname.

3) Click the **Find Person** button.

Custom Search



The custom search provides you with more advanced search options.

1) Click the **Custom Search** link to display the following screen which allows you to search for patients based upon any of the displayed fields.

2) Click the selection box alongside the required field and:-

a) for those fields with a drop down menu, select the required option from the menu; or

b) for those fields that are completed with a free text entry, enter the relevant value when prompted.

From Clipboard

Click the **From Clipboard** option if you wish to limit the search to those patients in the current clipboard .

APPOINTMENT BOOK

NAVIGATION

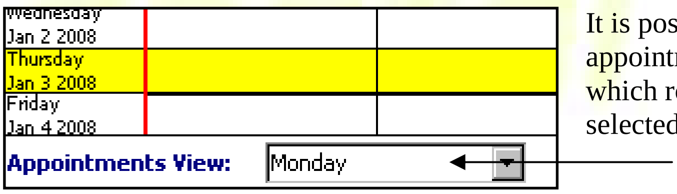
Movement Bar

Today	**Display today's date**		
1d	**Back one day**	**1d**	**Forward one day**
1w	**Back one week**	**1w**	**Forward one week**
1m	**Back one month**	**1m**	**Forward one month**
3m	**Back three months**	**3m**	**Forward three months**
6m	**Back six months**	**6m**	**Forward six months**

Calendar - see page **Error! Bookmark not defined.** for details of how to use the calendar to select the required date.

The bottom part of the screen comprises of the rooms that are available for booking. Each column is the equivalent of a room and each room is broken down into bookable slots. The length of the slots can vary according to your own requirements – select **System Maintenance/Application Preferences** from the **Administration** menu and click the **Appointment Book** tab.

Rooms should be created according to how many consulting rooms you have available – users can be linked to a room so that each time an appointment is booked into that room, then the correct provider (dentist) will be automatically selected for that appointment.



It is possible to create views for the main appointment book and for each view you can specify which rooms should be displayed when that view is selected.

SET UP THE APPOINTMENT BOOK

Views

Create a New View

1) Make sure that all of the rooms to be included in the view have been created.
2) Select the **Appointments\Views** option from the **Maintenance** menu and leave the **Add** box ticked.
3) Type in a name for the view.
4) Click on one of the rooms to be included in the view and click the right arrow to move the room name from the left-hand to the right-hand pane.
5) Repeat until all of the relevant rooms have been selected and click the **Add** button.
6) This view will then be available for selection in the appointment book.

7) If that room has been associated with a provider (dentist/hygienist) then the room name and the provider name will be displayed at the top of the room column.

Edit a View

1) Select the **Appointments\Views** option from the **Maintenance** menu and click the **Edit** box.
2) Make the required changes and click the **Update** button.

Delete a View

1) Select the **Appointments\Views** option from the **Maintenance** menu and click the **Remove** box.
2) Select the **View** to be deleted from the drop down box and click the **Remove** button.

Notes:

- Deleting a view does not delete any rooms associated with that view.
- A room can be added to more than one view.

Rooms

Create a New Room

1) Select the **Appointments\Rooms** option from the **Maintenance** menu and leave the **Add** box ticked.

2) Type in the room name, default start time and the number of hours that you wish the room to remain open and click the **Add** button.

Note: If you wish to associate the new room with a provider, this should be entered on the user name details. Select the **Manage Groups and Users** option from the **Administration** menu.

Edit an Existing Room

1) Select the **Appointments\Rooms** option from the **Maintenance** menu and click the **Edit** box.

2) Make the required changes and click the **Update** button.

Delete a Room

1) Select the **Appointments\Rooms** option from the **Maintenance** menu and click the **Remove** box.

2) Select the room to be deleted from the drop down box and click the **Remove** button.

Block Off Times in a Room

Use custom days and dates to modify the times that a room is open.

- Custom **days** can be added whereby you can specify different start and end times for a room for a particular day of the week. These times would then apply for that day for every week.

- Custom **dates** can be added whereby you can specify different start and end times for one particular date only. This option can be used to specify a one-off change of hours on a particular day or to record bank holidays and/or annual holidays. The custom dates, therefore, are the exception to the normal or custom days.

Select the **Appointments/Custom Rules/Room Rules** –**Customize Days** or **Customize Dates** – from the **Maintenance** menu.

Custom Days

To Add a Rule

1) **Room -** select the room name from the drop-down list.
2) **Day** – select the first day from the drop-down list.
3) All existing entries for that room and that day will be displayed. (If you are amending one, remove the existing rule and add it again otherwise the blocked off sections may be duplicated – see notes below.)
4) **Open** – if the room is to be open for any part of the day, click the **Open** button and enter the **Start Time** and enter the number of minutes that the room is to remain open in the **Minutes Open** box.
5) **Closed** – if the room is to be closed all day, click the **Closed** button.
6) Click the **Add** button to add the rule.
7) Repeat for the other days.

To Remove a Rule

1) Display the **Customizing Days** option as above.
2) Click the **Remove Rule** box.
3) Tick the rule(s) to be removed and click the **Remove** button.

Note: Check All selects all of the custom days rules and **Uncheck All** deselects all of the custom days rules.

Custom Dates

This option works in the same way as **Customising Days** as outlined above, but has a date range selection so that you can use this for blocking off a range of days for annual holidays, etc.

Also, there is a **Filter Date** option for the **Remove** Rule section so that you can view the current rules for the specified dates. If this box is not ticked, then all dates for that room will be displayed in the **Remove Rule** display box.

Block Off Emergency/Meeting/Break Slots

To close off slots:

1) Select the required day.
2) Right click on the start of the required slot.
3) Select from the following options.
   a) Emergency Slots
   b) Meeting Slots
   c) Lunch and Break Times
4) Complete the required details and click **Book**.

Edit Emergency/Meeting/Break Slots

1) Right click the slot and select the relevant **Edit** option.
2) Make the changes and click **Update**.

NOTE: These slots can be dragged and dropped to new slots if required.

Remove Emergency/Meeting/Break Slots

Right click the slot and select the relevant **Remove** option.

Copy Forward Emergency (Meeting or Break) Slot Patterns

Set up your pattern for these slots and select the **Appointments/Block Book/Emergency Appointments** (or **Meetings** or **Break Times**) option from the **Maintenance** menu. Patterns should be in multiples of 7 days.

Source: Specify the room number, the start date of the pattern and the length of the pattern in days.

Destination: Specify the room number, the first date to which the pattern is to be copied and the number of times the copy is to be repeated.

A similar procedure can be followed to block book break, lunch and meeting times.

Appointment Categories

New Categories

1) Select **Appointments/Categories** from the **Maintenance** menu. Leave the **Add** box ticked.
2) Type in a **Name** for the category.
3) Type in a default appointment **Length**.
4) Choose an associated colour from the drop down box in the **Colour** field.
5) Click the **Add** button.

NOTES:

You can select a category as the default category for your appointments. To do this, select **System Maintenance/Application Preferences** from the **Administration** menu. Choose the default category from the drop down list on the **Appointments** tab.

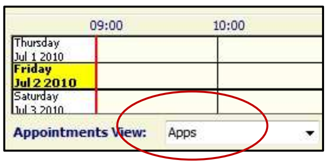
Editing and Deleting Categories

Click the **Edit** box, make the necessary changes and click **Update** or click the **Remove** box, select the category to delete in the **Name** box and click **Remove**.

BOOK APPOINTMENTS

Manually Enter Appointments

1) Patients must be registered before appointments can be booked – either as fully registered or express registered patients.
2) Click **Appointment Book** on the toolbar or **App Book** on the **Patient Detail** screen.
3) Make sure that the correct **View** is displayed and select the date in the Viewing **Date** window or use the movement bar to scroll through the book.



Today	**Display today's date**	**1d**	**Forward one day**
1d	**Back one day**	**1w**	**Forward one week**
1w	**Back one week**	**1m**	**Forward one month**
1m	**Back one month**	**3m**	**Forward three months**
3m	**Back three months**	**6m**	**Forward six months**
6m	**Back six months**		

1) Scroll through the appointment book to find a suitable appointment or to find the first available appointment in a particular room, click the search button at the top of the room.
2) Double click the slot required or right click the slot and select **Enter Appointment**.
3) Specify the **Category** and confirm the length of the appointment.
4) Select the **Provider** if this isn't already displayed.
5) If you navigated to the appointment book from the **Patient Detail** screen, the patient details will already be displayed. Otherwise, click **Patient Lookup** to search for and select the patient.
6) If it's a family appointment, click the **Family Booking** button, otherwise leave the Individual **Individual Booking** button selected. Family bookings will display an image of two heads on the right hand side of the appointment details once the appointment has been confirmed.
7) Type any other relevant information in the **Additional Information** box – optional.
8) Click **Book Appointment**.

NOTE: The appointment details will be displayed on the **Future Appointments** section of the **Patient Detail** screen.

Appointment Finder

1) Click **Appointment Finder** on the toolbar or on the **Patient Detail** screen.
2) Search for and select the patient if you have clicked the toolbar. The patient details will default if you have navigated from the **Patient Detail** screen.
3) Select the room – you can only search in one room at a time.
4) Select the booking interval by one of the following methods:-

Next Available After:	**ASAP** will search for the next available appointment;
	Use the drop down arrow to select **Weeks** and insert a number in front to look for the first available appointment after x number of weeks.
	Use the drop down arrow to select **Months** and insert a number in front to look for the first available appointment after x number of months.
	OR
Require Appointment After:	Select a date from the calendar to look for the first available appointment after that specific date.

5) Click the box alongside the option required and specify your requirements.
6) Select the appointment length.
7) Specify the patient availability.

8) Tick the **Include Emergency Slots** box if relevant.

9) Click the **Find** button to display the first suitable, available appointment.

- Click **Book** if the appointment offered is acceptable.
- If one of the other appointments on the same day is acceptable double click that slot or single click and click **Book**.
- Search again if all appointments for that day are unsuitable. You can click **forward one day**, **forward one week** or **forward one month**. At any relevant point, you can click **Previous** to return to a previous selection.

10) When a suitable appointment has been selected, confirm the appointment:-

<u>For a single appointment</u>

Click on the **Further Appointment** box to remove the tick and click **Book Appointment**.

<u>For a series of appointments</u>

- If a further appointment is required for the same patient(s), leave the tick in the **Further Appointment** box and click **Book Appointment.** The system will then automatically continue to search for the next appointment.
- Remember to change the room and patient availability if applicable. You can reset the date to start looking from today's date instead of from the previous appointment by clicking **Reset**.
- Remove the tick in the **Further Appointment** box before clicking **Book Appointment** for the last appointment in the series.

11) Once the last appointment has been booked, a list of the relevant appointments will be displayed for you print or to confirm to the patient.

Booking a Treatment Plan

See separate notes for those practices using full clinical charting.

Edit or Resize an Appointment

1) Right click the appointment and select **Edit Appointment**.
2) Make the necessary changes and click **Confirm Changes**.

Cancel/Cancel and Rebook an Appointment

Right click the appointment and select:-

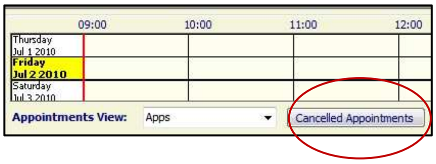
- **Cancel** – to cancel the booking; OR
- **Cancel and Rebook –** to cancel the existing appointment and rebook for another date and/or time. If you select this option, original appointment details will be redisplayed when you double click the new appointment slot. At the **Are you sure** prompt, click **OK** to move the appointment or **Cancel** if you change your mind and wish to leave the appointment in its original position.

NOTES:

If you can see the existing and new appointment slots on the screen at the same time, you can drag the appointment from its existing position and drop it into its new position.

You can view a patient's future appointments from the **Patient Detail** screen. If you click one of these appointments, the appointment slot will be displayed in the appointment book ready for you to edit or cancel, if required.

You can view a list of cancelled appointments by clicking the **Cancelled Appointments** button on the appointment book viewer. If the patient has a future appointment, the **Future Appointment** column will be ticked. You can restore appointments by clicking on one of the entries and clicking the **Restore Selected** button.



Attend Appointments

Express registered patients will need to have their appointment details updated before their appointments can be marked as attended.

If you are using a waiting list, right click the appointment and select **Send to**. Select the relevant list and the patient will be added to that list and the appointment marked attended. Once attended, the colour of the appointment will change depending upon your chosen colour scheme. (The **Navigate** option when selected from the waiting list, will mark the appointment as completed.)

It is possible to manually mark appointments in the appointment book as attended, even if you choose not to use a waiting list. If you are using lists, however, this option is not normally activated otherwise someone may inadvertently mark an appointment as attended but not put the patient onto the waiting list.

If you are not using a waiting list, appointments can be marked attended and completed as follows.

Mark an Appointment Attended

Right click a slot and select **Mark Attended**.

Mark an Appointment Unattended

Right click a slot that has already been marked as attended and select **Mark Unattended**.

Mark an Appointment Completed

Right click a slot that has already been marked as attended and select **Mark Completed**.

Mark an Appointment Incomplete

Right click a slot that has already been marked as completed and select **Mark Incomplete**.

NOTES: If you have marked the wrong appointment both as attended and complete, you would need to mark it as incomplete first before you would be able to mark as unattended.

Double Book an Appointment

1) Right click the appointment slot and select the **Double Book** option.
2) Enter the relevant details and click **Book Appointment**.
3) Both appointments will be displayed side by side.

Emergency, Meeting and Break Slots

Slots can be blocked off for emergency appointments, meetings, or lunch/breaks. Once inserted, these slots can easily be cancelled or dragged and dropped onto alternative slots.

To block off your appointment book in this way, right click an appointment slot and select the required option. Complete the relevant details and click **Book**.

NOTE: If you set up a pattern of regular emergency, meetings or break slots, this can be copied forward throughout your appointment book.

Edit an Emergency, Meeting, or Break Slot

Right click the option and select **Edit**.

Cancel an Emergency, Meeting or Break Slot

Right click the option and select **Remove**.

Move an Emergency, Meeting or Break Slot

Can be dragged and dropped to a new time.

Book Into an Emergency Slot

Patients can be booked into emergency slots if this becomes necessary.

1) Right click the emergency slot and select the **Book Appointment** option.
2) Enter the relevant details and click **Book Appointment**.

The emergency slot and the appointment will be displayed in the same way as a double booking, ie with both the original emergency slot and the appointment being displayed alongside each other.

RECALLS

Select **Recall Run** from the **Reports** menu.

PATIENT AND DATE SELECTION	
Obey Patient's Contact Preference	Checks for preferences on the patient details screen.
All Dates	Specify the date range to be included in the search.
Ignore Recall Year	Click if you wish to search on the day and month only and ignore the year.
Ignore Patients with Appointments Booked	Specify the required number of months so that patients with existing appointments can be excluded.
Exclude Email Preference	Tick this box to exclude patients who have the **Email Preference** box ticked. Only applicable if you intend to email these patients separately.
Exclude Mobile Preference	Tick this box to exclude patients who have the **Mobile Preference** box ticked. Only applicable if you intend to send text reminders to these patients separately.
Filter by Provider	If you wish to filter the recalls by provider, click this box and select the provider from the drop down list.

These last two options would allow you to print labels or letters to patients who would not receive an Email or SMS text message. If you are not using Email or SMS, then leave these two boxed unticked.

Once you have specified the patient and date requirements, select the required output of your report.

Printed Output

LABELS	
Labels	This will print labels to a label printer. If you do not have a label printer, then you can still print labels using the **Labels (Word Merge)** option.
Labels (Word Merge)	This will print onto a page of A4 labels on your default reports printer. There is a direct link into MS Word. You need to create a label template in MS Word before you can start using this option. If you do not have a copy of MS Word, you could

	export the data to a csv file and use this to print labels using any other word processing package that supports mail merge. Field tokens to be included in the merge are as follows:- Title, Forename, Surname, Address1, Address2, Address3, Address4, Postcode.
Reminders (Mail Merge)	You can print a reminder letter using a direct mail merge into MS Word, as with the A4 label option. As with the labels, you will need to create a letter template in MS Word before you can start using this option. Field tokens to be included in the merge are as follows:- Title, Forename, Surname, Address1, Address2, Address3, Address4, Postcode, RecallDate
Preview Button	Tick this box before clicking either of the above options to preview the results before printing.
PRINTED LIST	
Preview List	Select this option to preview a report of all patients whose recalls are due in the specified date range. Once the preview has been displayed, the report can be printed by clicking the print icon at the top of the preview screen.
Print List	Select this option to print a report without previewing it first.

File Output

FILE EXPORT	
Export to .xml	Exports the data in xml format. (xml is a generic framework for storing any amount of text or any data. Its primary purpose is to facilitate the sharing of structured data across different information systems, particularly via the internet.)
Export to .csv	Exports the data in csv format. If you do not have a copy of MS Word, this file could be used, for example, as a hit file to create a mail merge (either to letters or labels) in another word processing package that supports mail merge.

Excel Sheet	Exports the results and displays them in MS Excel.

Electronic Output

If you have printed recalls and excluded either the **Email** or **Mobile** preference in the **Patient and Date Selection** section, you can subsequently choose to send Emails or SMS text messages to those patients excluded from any printed output. You could, of course, choose to send Emails and SMS text messages as well if you prefer.

Templates would need to be set up for both text messages and Email and your system configured to send text messages and Emails before these options are first used. For text messages, you would need to sign up to a text message provider and for Emails you would need to be connected to broadband. Please contact our Support Department for further details.

Once your system has been configured, select one of the following options from the drop down menu.

Email Only	Will send an Email to those patients where the **Email preference** box is ticked.
SMS Only	Will send a text message to those patients where the **Contact by SMS preference** box is ticked.
Email then SMS	This will send either an Email or SMS or neither, depending on the following order of precedence. It will check each patient's record and send:- • an Email to those patients where the **Email preference** box is ticked; • where the **Email** preference box is not ticked, it will send a text message if the **Contact by SMS** box is ticked; and • if neither is ticked it will send neither.
SMS then Email	This option is the same as the one above, except that the order of precedence is SMS first and Email second
Both Email and SMS	This will send both Email and SMS where the preference boxes are ticked.
Send Messages	Once one of the above options has been selected, press the **Send Messages** button.
SMS Credits	There is an option in the **Edit** menu that allows you to record that you have purchased SMS text credits from your text provider. If you record all purchases using this option, this display will give you an <u>indication</u> of how many text credits you

	have available. The actual amount of credit you have available will be handled by your text message provider. Once the text messages have been sent, the **SMS Credits** field will be updated.
SMS Template	Click this button to set up your SMS text message template – ie the default text message that will be sent to each patient. See notes below.
Email Template	Click this button to set up your Email template – ie the default message that will be Emailed to each patient. See notes below.

SMS Template

The SMS template file is called SMS.xml. There will already be a default template in existence, as follows. This should be displayed ready for selection.

From: **This should be your Email address for your text provider account.**

Subject: Will default to **Recall** but can be edited.

Body: This box should contain the text message that you wish to send to your patients. The default message can be edited and the text can contain the field tokens listed below.

Make the necessary changes and click the **Save** button.

Email Template

The Email template is called Email.xml. There will already be a default template in existence, as follows. This should be displayed ready for selection

This is set up in a similar way to the SMS template. Make your changes and click the **Save** button.

Tokens for Electronic Output

The following tokens can be embedded in the text of either SMS or Email templates. When the SMS messages and Emails are sent, the following data will be inserted in place of these tokens.

“PATIENT NAME”	Patient’s title followed by patient’s surname
“DUE”	Recall date – as displayed on the **Patient Detail** screen
“DATE”	Today’s date