Systems for Dentists

The Basics to Practice Management in SFD

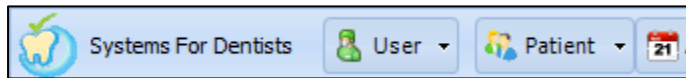# Contents

Introduction

In SFD many of the features can be customised. The setup of the program allows you to customise virtually every aspect of your program.

Further support and help can be found [Dental Software - frequently asked questions (sfd.co)](#)

The **setup tools** can be accessed by selecting the SFD tooth in the top right of the SFD software.
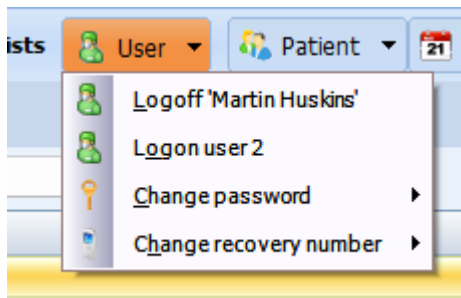

The Setup menu will appear which is spilt into different reporting sections.
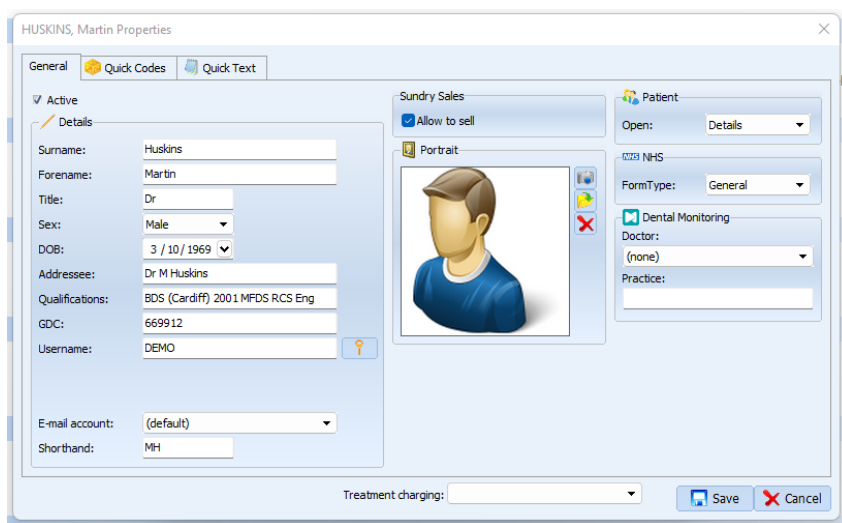
Setting up a user

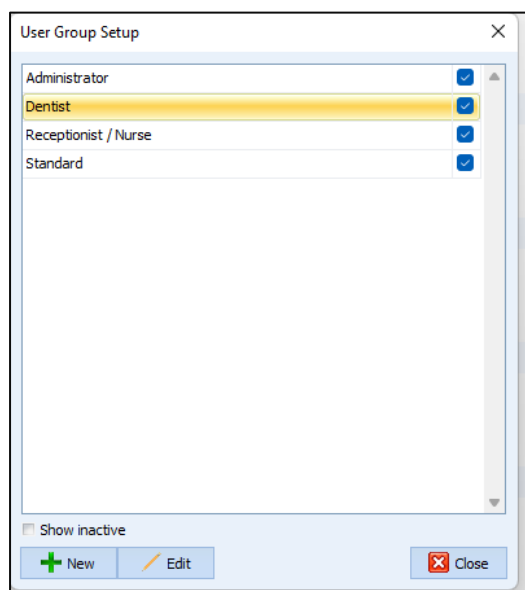Click Users from the SfD setting menu

Click add to add a new user and fill in the required details.

Once you're happy and you want to save the profile it will ask you to add this patient into the relevant group.

Add the user to the relevant groups.

If you want to add a new group in then you can click "new" in the bottom left-hand side of the box. From there you will have the option to add in a new name for the group change the settings of a said group this is the permission that members of this group will have on the system and the members tab where you can add in the users.
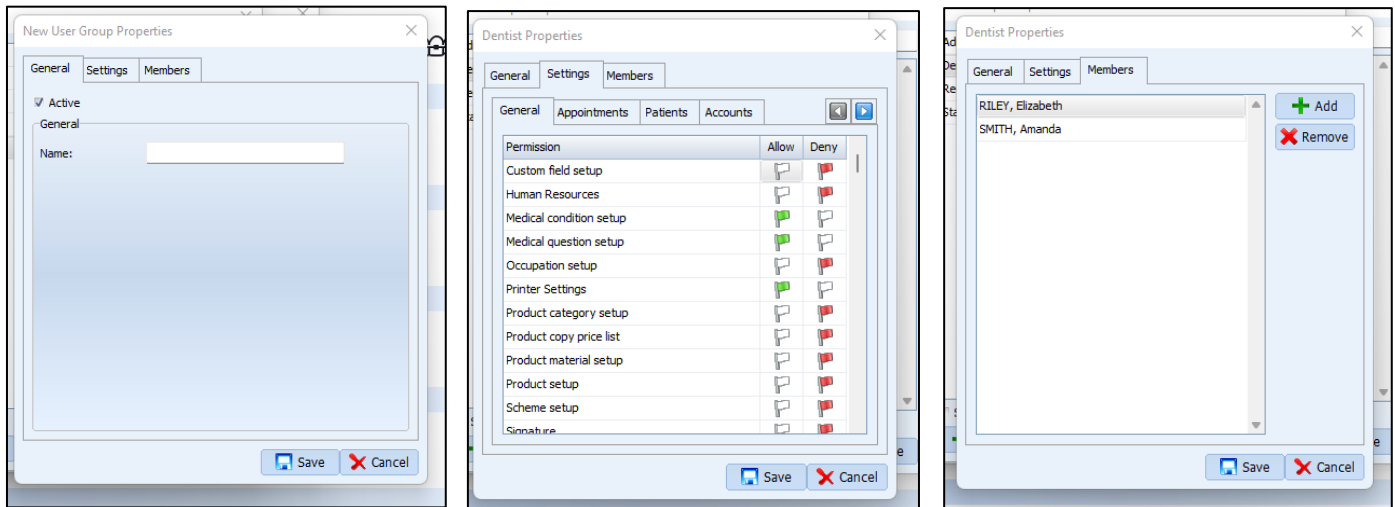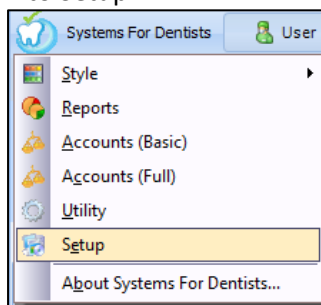

Creating a book for a performer

The SFD dental software allows you to personalise each of the dentists' working hours within the book with their start/finish times and when they are off.

### *How do I set up a performer's appointment book?*

To access the Books setup, click on the Tooth button in the top left-hand corner of SFD and go into Setup.


From there click on the Books button (Shown below), which is located under the Appointments bar.
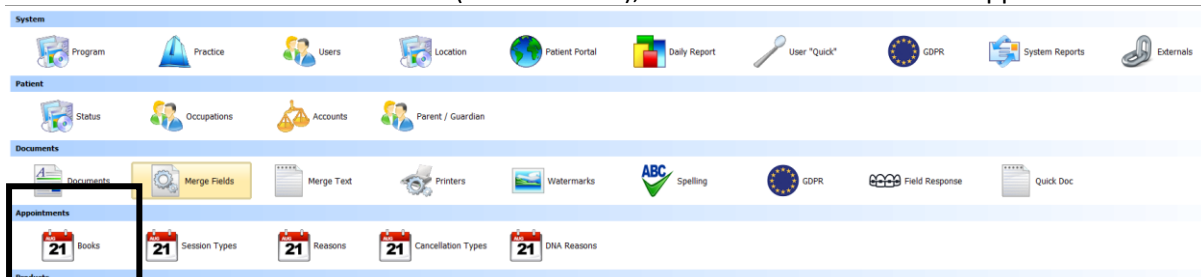
The Appointment Book Setup window should now appear. Within this window is a list of all the dentists/hygienist with an appointment book in the system. To see any inactive books, click on the Show Inactive checkbox in the bottom left-hand corner of the window. To edit any existing book, highlight the one you want and click on the Edit button. To create a completely new book, click on the **New** button.
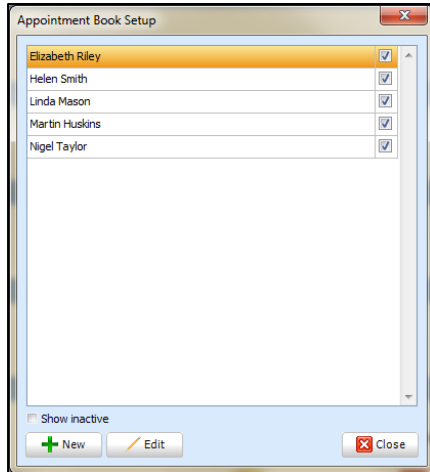

When creating a new Book, the next window which will appear is the User Select window (shown below) from this window just click on the person you want to create a book for and click on the OK button.
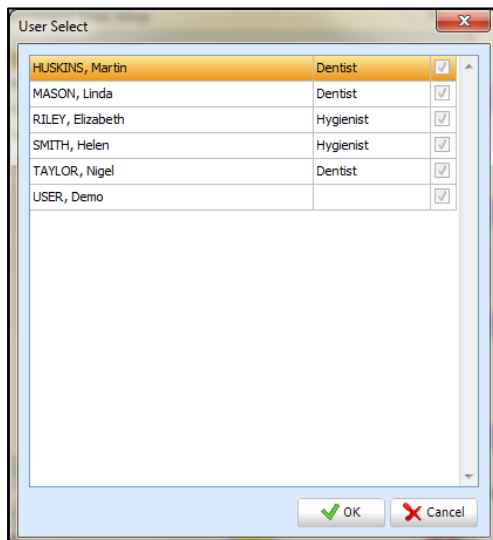
The Appointment Book Properties window should now appear (shown below). The first thing to do in this window is to type in the name of the book you are creating in the Name textbox.
The next step would be to set the location of where the user will be working via the Location drop down list. Pick the colour for your book by clicking on the drop-down list next to the Colour label.
As you can see there is a tab named Week 1, this is the number of weeks in the rota currently, if you wanted to add more than 1 week to the book, just click on the Add button in the bottom left-hand side of the window.
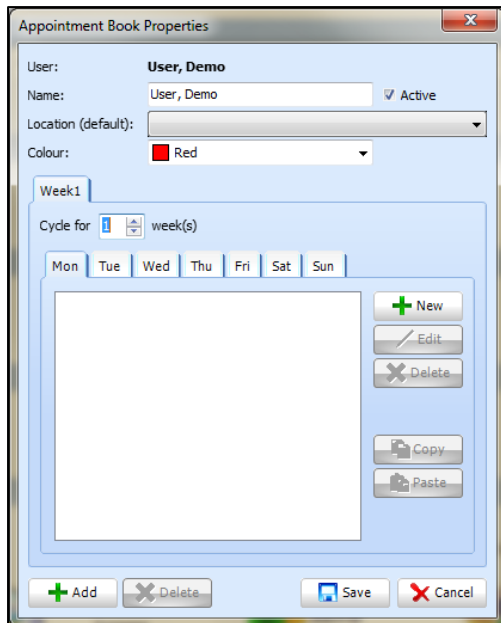
Once you have clicked on the Add button, the Systems For Dentists dialogue box will be brought up to confirm that you want to add a new week to the cycle, click on the Yes button to continue.
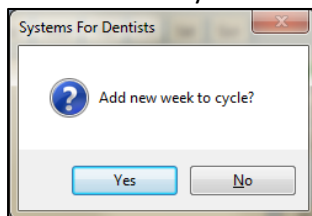
A new Week tab will now appear on the Appointment Book Properties window (shown below), with a whole new week of sub tabs beneath it.

To delete a week cycle, highlight the week which you would like deleted, and click on the Delete button at the bottom of the window, that will bring up a similar dialogue box to the one shown above. Click the Yes button to confirm you would like to delete the weeks cycle.
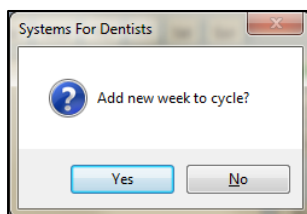
Right below the Week tabs, there is a number edit where you can enter a number, this number is for the number of weeks you want that particular week to cycle for until you move onto the next week on your rota.

Now once you have added more weeks and decided how many times those weeks should cycle for, the next step will be to start adding in the session working hours within the day tabs. To do this click on the day your dentists will be working, and click on the **New** button.

The Session Properties window will now appear (shown above). Within this window you will be able to set the time the session will start and finish via the First appt and Last appt drop down lists, what interval duration you would like your books to have and the type of session you would like to create. The Location drop down list will allow you to set a location for this session, if you leave it as default, this will take the location which you set within the previous window. Once you are happy with all the details you have entered, click on the Save button.

If you ever needed to go back into a session, double click on the session you would like to edit, or just simply highlight the session and click the Edit button, which is located on the right-hand side of the window. To delete a session, highlight the one you want and click on the Delete button located under the Edit button.

As you can see from the window above, I have set a session to begin at 9am and end at 1pm. Now if I wanted to have my lunch period from 1pm to 2pm, I would create another session on this day to start at 2pm. This will give you a 1-hour slot between the two sessions where appointments cannot be booked in.

Once you have filled in the sessions for one day, you can easily copy those exact sessions to another day by highlighting the top session and clicking on the Copy button to the right of the window. If you then go into another day tab and click the Paste button, located under the Copy button. This will then bring in the sessions you created on the previous tab to this one.

Once you have gone through all the day tabs within the first week, you then can click on the next week tab and repeat the process.

Now that you have entered in all the sessions you need for each week, click on the Save button in the bottom right-hand side of the window.

Your new book will now be created and ready to use within the system.

How do I change the session types?

In SFD the appointment book can be organised by session type to allow certain types of appointment to be booked or not booked in certain slots. It is also beneficial for to create none bookable areas such as lunch slots. This also allows you to book appointments by session type such as emergency. The session types can be colour coded.

In the **Setup** menu select **session type.**
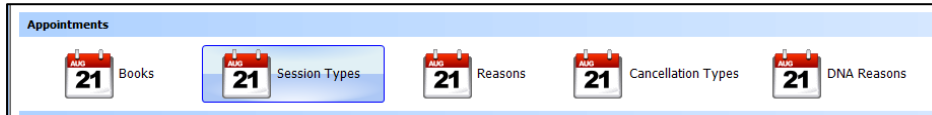
The appointment session type window will show any existing sessions types and their assigned colours. They can be checked or checked to use. To add a new session type, click **New.** To edit an existing session type, click on the session type you wish to edit and click **Edit**.
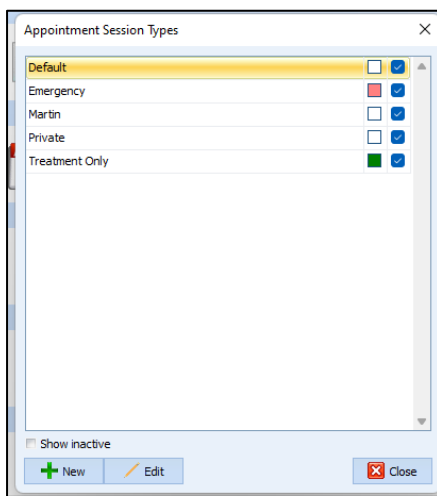
In the New appointment session type properties window give the session type a **Name** such as Emergency, chose the **colour** of the slot and type of slot. Click **Save**

Normal: allows the slot to be bookable

No Appointments allowed: make the slot unbookable (Such as lunch slots)
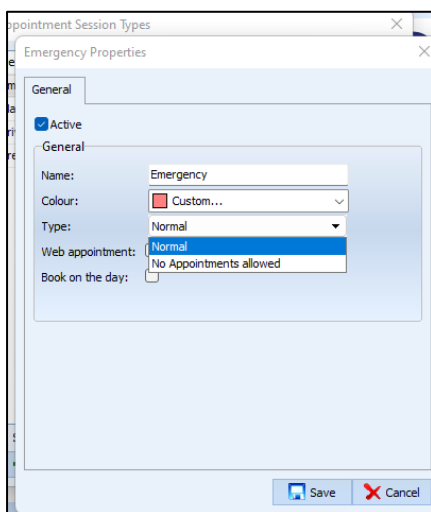
How do I change book properties for one day only?

Click the **Appointment** button on the Main Menu.
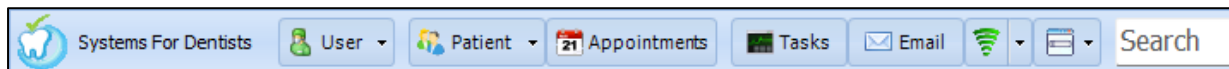
Click on the **drop-down** arrow next to the performer name in the appointment book. Select **Day Properties**
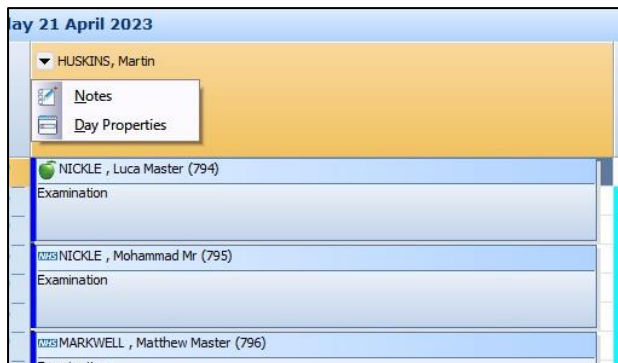
From the Appointment Book properties. New sessions can be added based on sessions types you have previous created, for example adding in an emergency slot or changes session times.
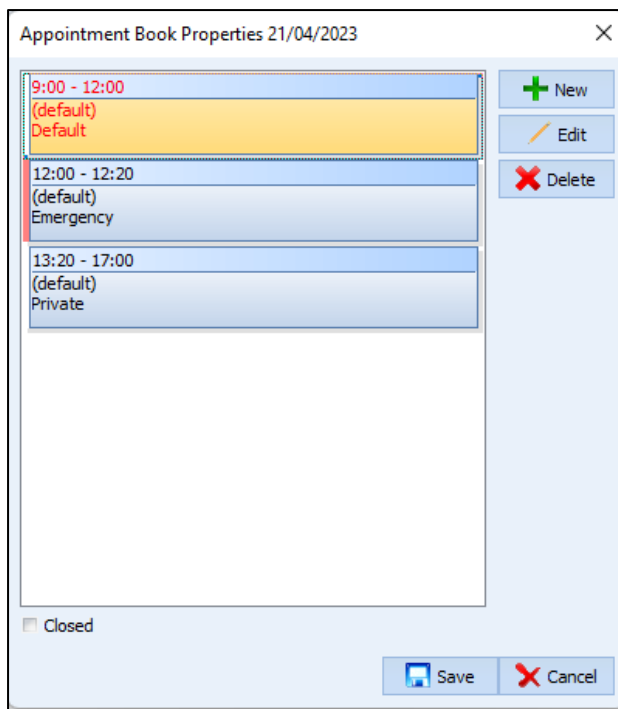
How to record holidays and days blocked by a performer

For each performer you will have the option to record their holidays within the system and have the options to cancel a day (if a performer is Ill), add in a blocked time (if a performer has prior arrangements that day) and in general closing a day for a performer.

How to add holidays in for a performer at the practice

When on the appointment book you will have a drop-down oven that will give you multiple options to customise the diary and also add in the options to add in holidays for performers.
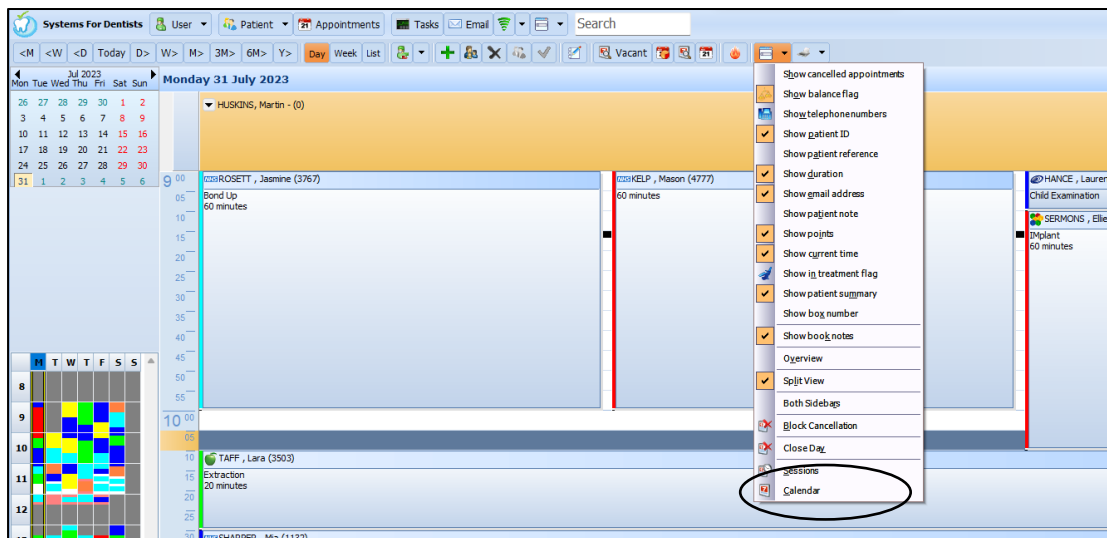
Within here you will see 3 options down the bottom in which you can use to add in the holidays and days blocked for a performer at the practice.

For adding in holidays for a performer we will be using the "calendar" option mostly but "close days" can also be used to add these in.
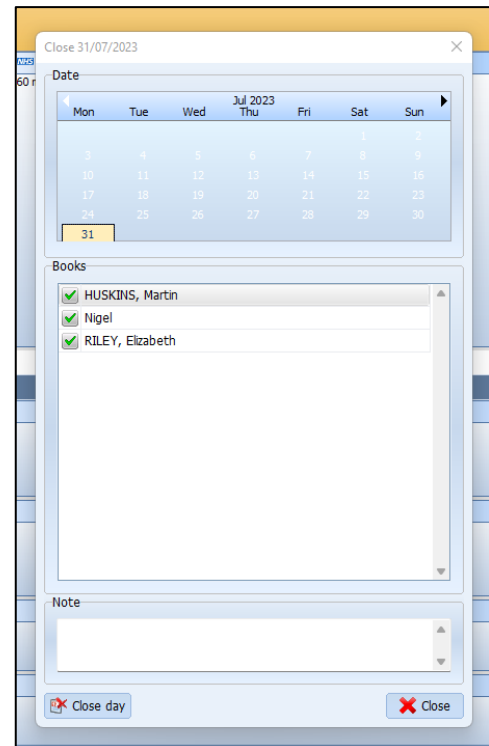
When you are using "calendar" it will load up a calendar for the entire year for the performer you have selected at the bottom of the screen if you want to change which performer you are looking at simply just selected a different performer from the list. If you know what days that performer is not going to be available to work simply double click on the days and when they turn yellow that is that day then closed. If you do

make a mistake all you have to do is double click the day that is yellow and that will reopen that day for you.
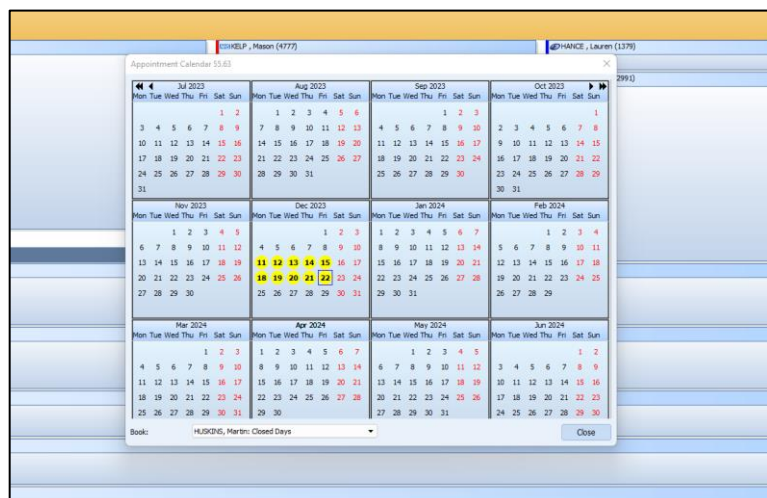
To add bank holidays and national holidays on the system the easiest way to do this would be to use the "**close days**" option from the drop down.

This calendar will just show you a month by month view. Once you know the days you are going to be closing you simply select the day and the performer underneath who are available on that day by ticking and unticking by their name. Once you are happy simply just click the "close day" option in the bottom left to block that day off.

Note: This only allows you to do it one day at a time and you will have to do it for each national holiday the only benefit is that it allows you to do multiple **performers** at once.
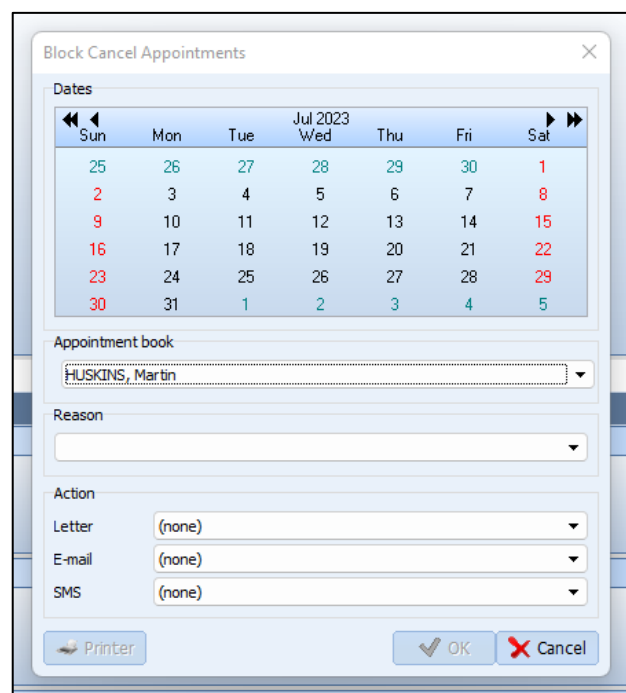
Cancelling patients for a day at the practice

Within the drop down you have the option "**block cancellation**" this gives you the option to cancel out all of the patients in a performer's diary on a specific day in the event that the performer is unwell and absent.

All we have to do to achieve this is again select the day from the calendar about and which book you are looking to cancel for that day.

From there we need to input the reason for the cancellation of the appointment and any actions we want to send for the patients to receive in regards to the cancellation.

Once happy simply hit "**ok**" and it will action this.

Reporting Introduction

In SFD reports can be created to analyse key performance indicators (KPI) of performers and patients. These reports allow you track to practitioner performance, analyse business areas of top performance and areas for development. Patient information can be analysed to see patient in debit, DNA appointments or patients without recall appointment, plus many more. This guide discusses the reports that a practice manager may find useful for managing and checking KPI's.

Reports can be accessed by selecting the SFD tooth in the top left of the SFD software.

The Reports menu will appear which is spilt into different reporting sections.
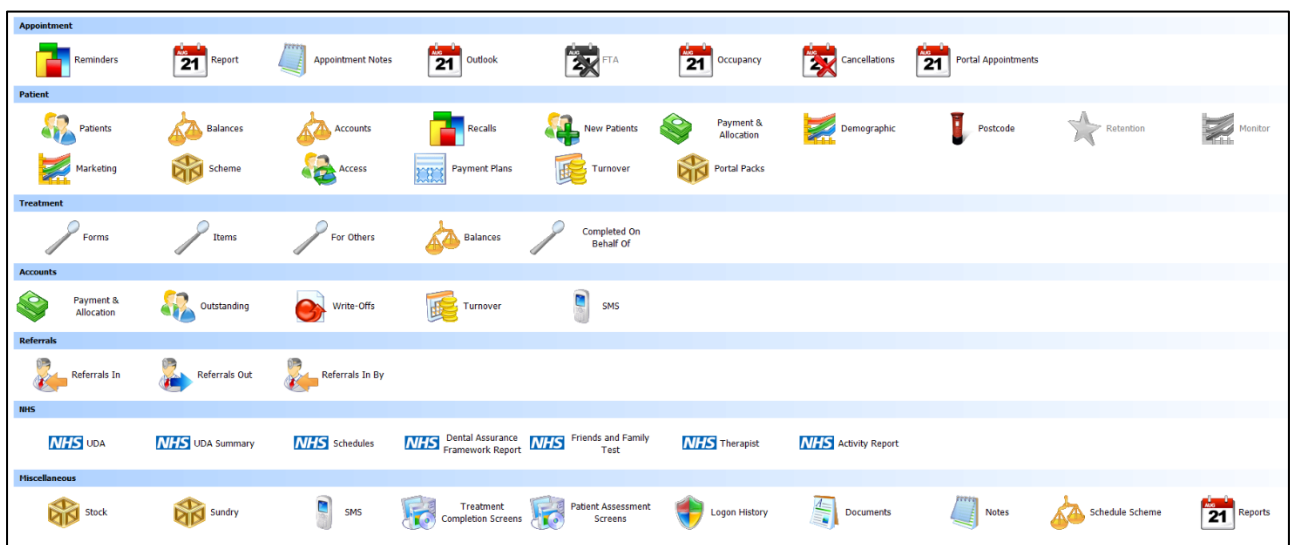
Appointment Reports

In SFD the appointments section looks at data from the open appointment books. The information can be filtered by performer or by scheme.

Report

The appointment **report** can be found in the appointment section. Click the **Report** icon.

Select the **Report** button to generate the report.

Select the **date range** from the drop-down options menu.
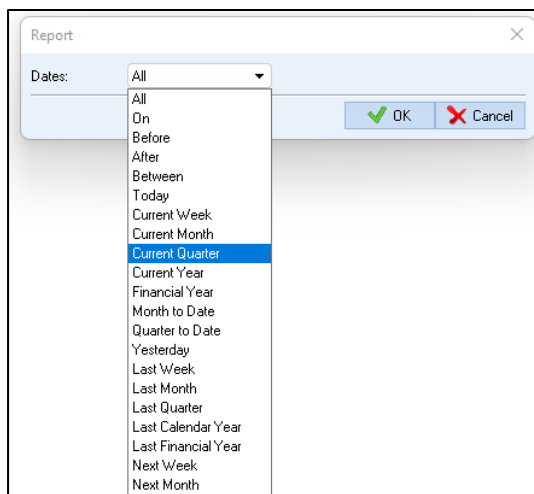
When the report generates you can navigate through each tab to view various appointment data. The attendance tab will show the occupancy of each performer.

Select **by period** and **by Count.** This will show the occupancy of each performer for the given time period that you have selected.

NB: As a practice manager you are looking for over 90% occupancy rate with a top target of 98%.

The **DNA** tab shows appointments that patients did not attend. The report will also show the number of hours/ minutes that have been lost to DNA appointment. The report can be filtered by book, scheme and urgency.

NB: It is important to note that this tab only displayed the information. A similar report can be created using the patient report, where patients can be directly contacted from the report in a block,

The **Hygiene tab** will show all hygiene appointments. You need to select by period to see hygiene appointments, DNA and PLC (Patients late cancellation). This data will only be related to hygiene appointments.

The **reasons** tab will show a pie chart with the various reasons for appointments. The report can be filtered by book, scheme and urgency. **NB: this report is useful for an overview and help to target marketing campaigns.**
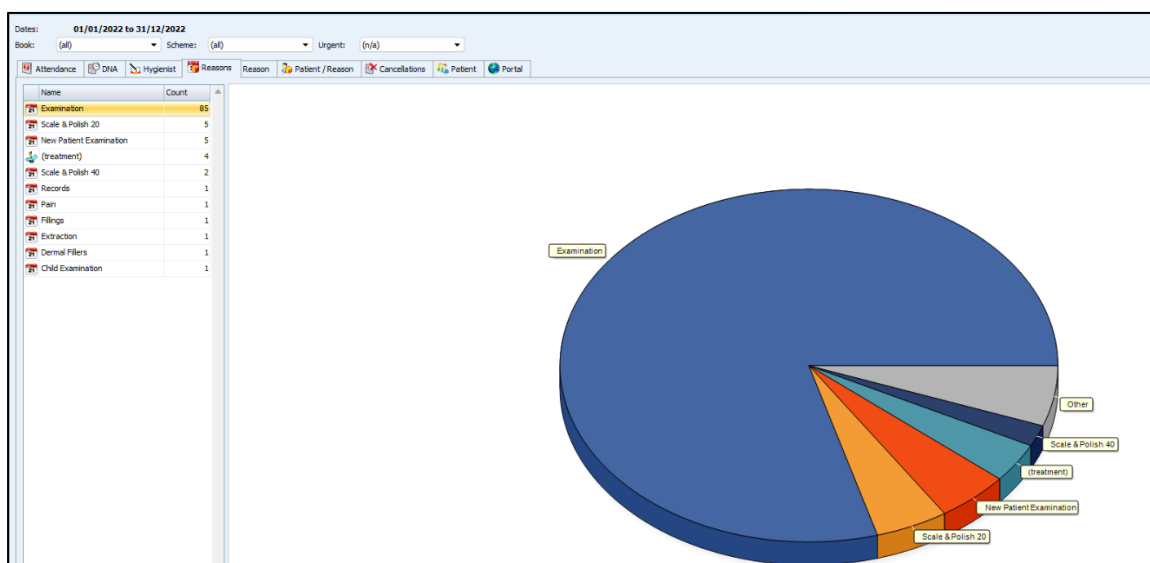
The **patient/Reason** tab allows you to view the data for patient's reason for an appointment. The report can be filtered by reason by selecting the reason from the drop down.

The **Cancellation tab allows** you to track cancellations in more depth. As these can be filtered by cancellation reason.

The **patient tab** lists all the appointment that have taken place in that reporting period. This report can be filtered by book and scheme.

The **portal tab** will show all patient appointments that have been booked using the online patient portal. This report can be filtered by book and scheme.

Occupancy Report

In SFD the **occupancy** report can be located in the **appointments section** of the reports screen. This report allows you to see the number of hours spent on appointment versus appointment availability. Occupancy will be shown as a percentage.

NB: As a practice manager you are looking for over 90% occupancy rate with a top target of 98%.
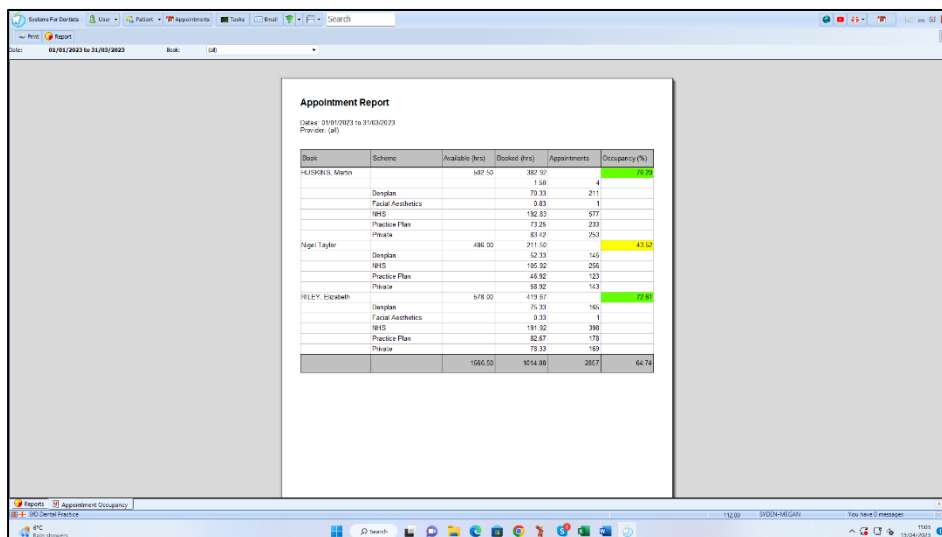
Select **report**

Select your required **date range** from the drop down.
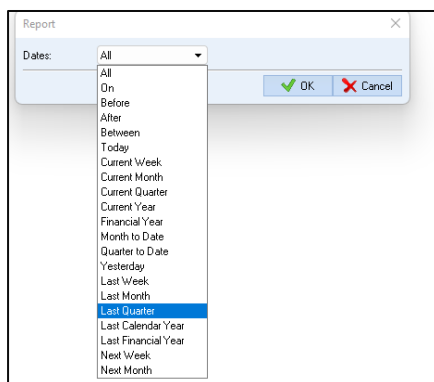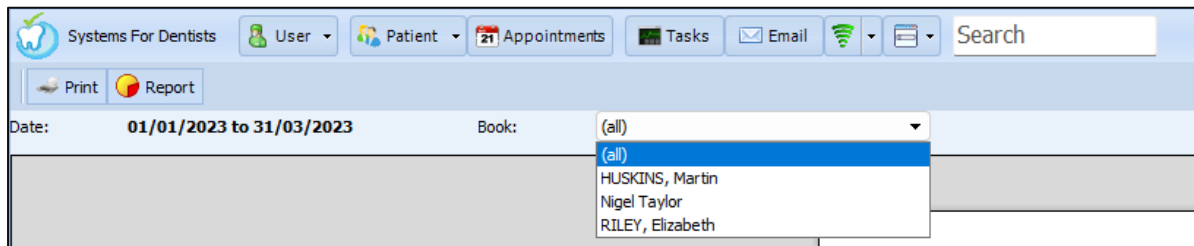
The report will appear, which can be printed as a hard copy or printed to PDF and saved as a document.

The report can be **filtered** by all performers or by individual books. Select the drop down to choose your filter option.
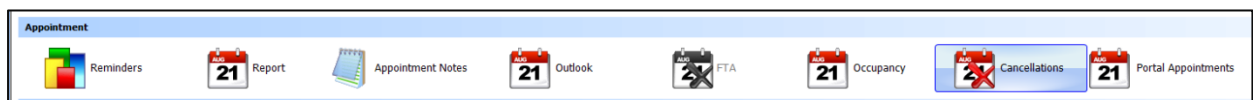
Cancellation Report
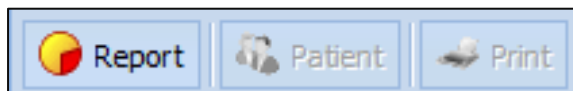
In SFD the **cancellation report** allows you to look at the reasons for cancellations over a given period of time.

The report can be located in the **appointment section** of the reports screen. Select the **Cancellation button.**
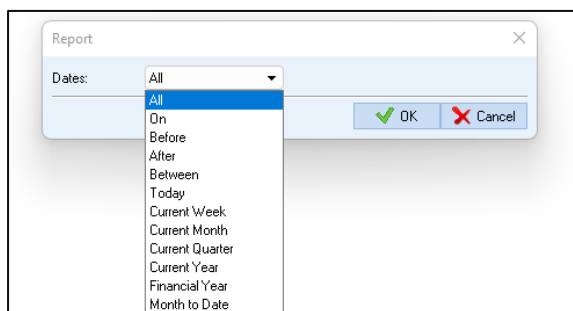
Select **report** to generate the report.
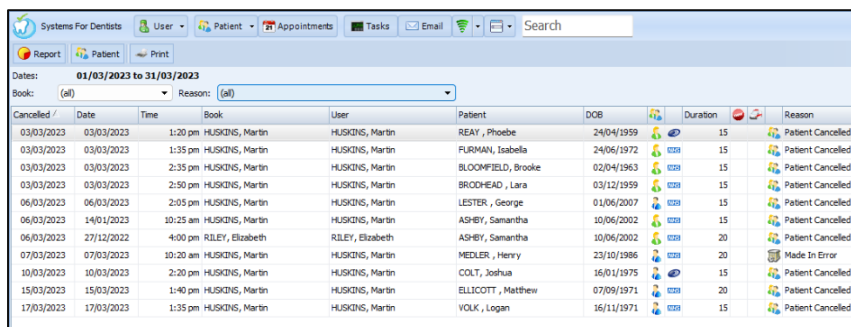
Select the date range from the drop-down options.
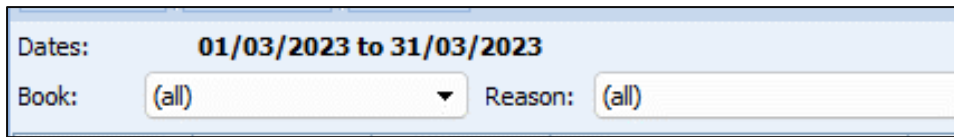
The report will show a list of all cancelled appointments with reasons for the cancellation.

The report can be **filtered** by performer and reason, by using the filter drop-downs.

Patient Reports

In SFD the patient's report is extremely powerful. This report allows you to query a wide variety of patient data.

You can run a patient accounts report using the patient report features to find patients that have a balance over a certain value.

Patient Report (Accounts info)
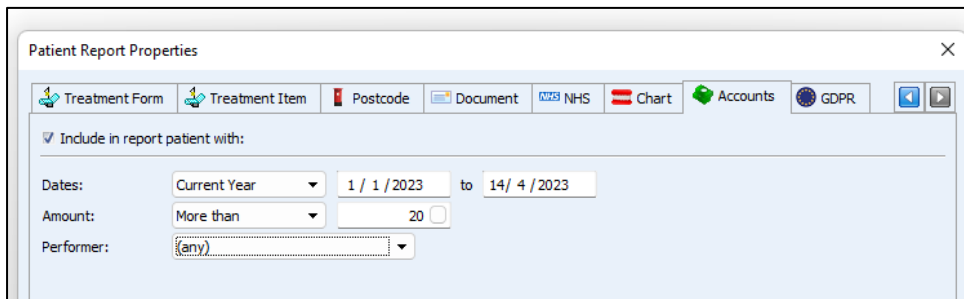
Select **Patient** from the **Patient section** in the report menu.
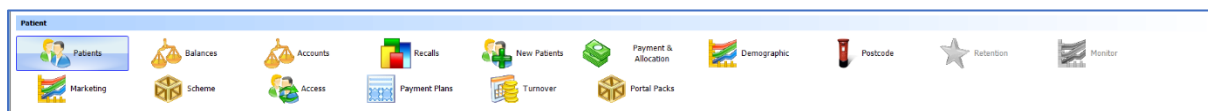
Select **new**
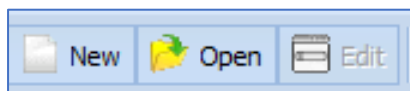
Scroll along the tab using the arrows until you see the **accounts** tab.

Tick the box to **include in report**.

Select your **dates range** from the drop-down.

Select the **amount** option from the drop down and type in the value. For example, patient owing more than £20 on their account.

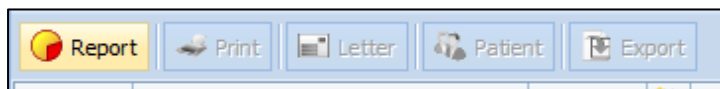This report can also be filtered by performer.

Balance Report (Bad Debt)

If SFD you can generate a report to show any patient with a debit account (Patients with outstanding balances).

In the reports menu select **Balance** from the **Patient** section.
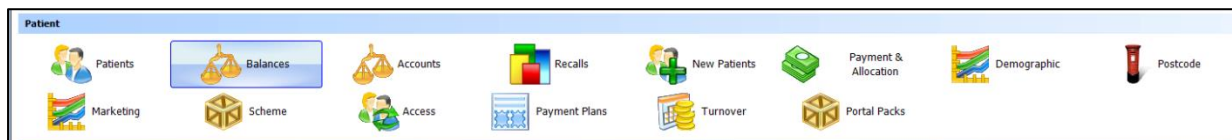
Select **Report**

Select Balance type from the drop-down option. If you are looking for patients with a Debit balance, select debit from this list.

Add in the value you are looking for. For example, patients with balances over £20. You can also choose from the other option boxes what their patient status is, if they are currently in treatment or not and whether they have a booked appointment.

When the report runs a list will be provided with patient that meet your chosen criteria.

This list can be printed or letters can be generated to be sent to the patients from within this report.
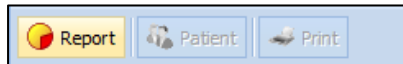
Turnover

In SFD a report can be created to show the turnover from patients within a specific time frame.
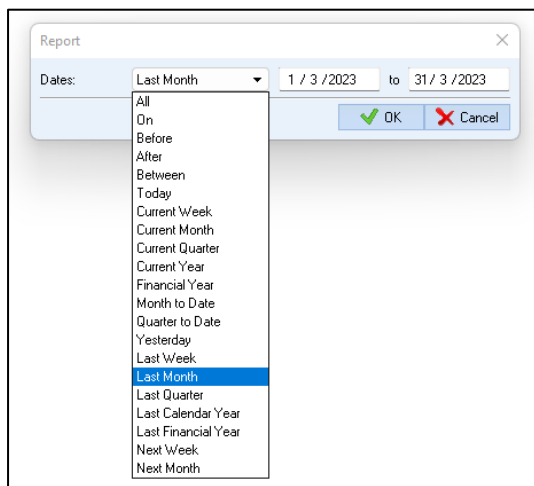
Select **Turnover** in the **Patients** section of the Reports screen.
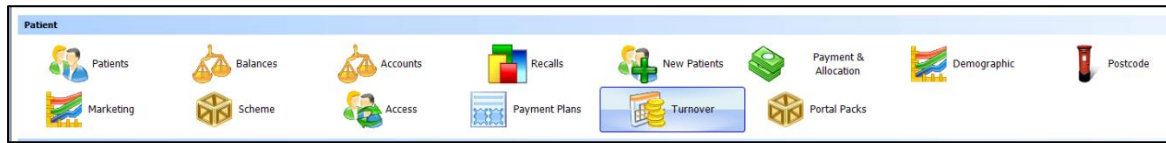
Select **Report**
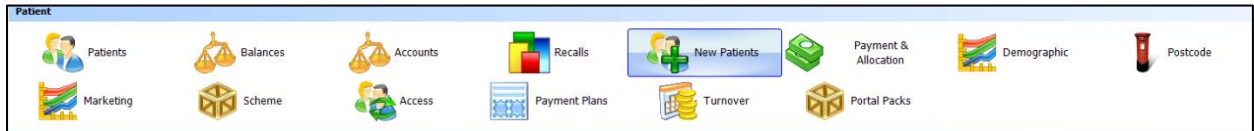

Select the **date range** from the drop down.

The report will appear showing the patients that have paid for treatment in that date range. The report can also be filtered by performer and scheme type.

| Date	Performer	Scheme	Patient	Item	Description	Amount
03/03/2023	HUSKINS, Martin	NHS	BEAM, William			65.20
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	EX&SP	Exam and Scale & Polish With	78.54
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	XRAY-S	Small Xray (s)	18.48
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	FILL-C-M	Medium Composite Filling	121.28
03/03/2023	HUSKINS, Martin	Private	REEDS, Phoebe	XLA	Extraction	98.18
06/03/2023	HUSKINS, Martin	NHS	ASHBY, Samantha			23.80
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	EX&SP	Exam and Scale & Polish With	78.54
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	FILL-C-M	Medium Composite Filling	121.28
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	DENT-PA	Partial Acylic Denture	565.95
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	XRAY-S	Small Xray (s)	18.48
07/03/2023	HUSKINS, Martin	Private	SMITHE, Eve	CR-PBOND	Porcelain Bonded Crown	554.40
10/03/2023	HUSKINS, Martin	NHS	ALLEN, Mark			23.80
10/03/2023	HUSKINS, Martin	NHS	MEAKIN, Harriet			65.20
10/03/2023	HUSKINS, Martin	Private	MEAKIN, Harriet	CONS	Consultation	41.58
10/03/2023	HUSKINS, Martin	Private	MEAKIN, Harriet	HYG	Hygienist Visit	55.44
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	CONS	Consultation	-37.80
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	CONS	Consultation	41.58
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	XRAY-S	Small Xray (s)	18.48
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	FILL-A-L	Large Amalgam Filling	103.95
13/03/2023	HUSKINS, Martin	Private	BEARDALL, Erin	RCT	Root Canal Treatment	404.25
15/03/2023	HUSKINS, Martin	NHS	ASHFIELD, Isobel			65.20
17/03/2023	HUSKINS, Martin	NHS	SMITHEE, Aidan			23.80
20/03/2023	HUSKINS, Martin	Private	JENKINS, James	EX-NP	New Patient Examination	103.95
20/03/2023	HUSKINS, Martin	Private	JENKINS, James	XRAY-S	Small Xray (s)	18.48

New patient report

In SFD a report can be created to check the status of new patients, for example if they have been registered and attended an appointment, registered but not attended and whether they are registered with a dentist.
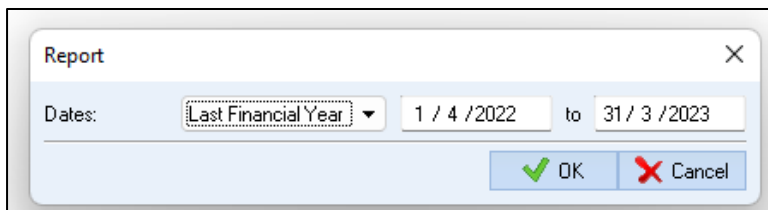
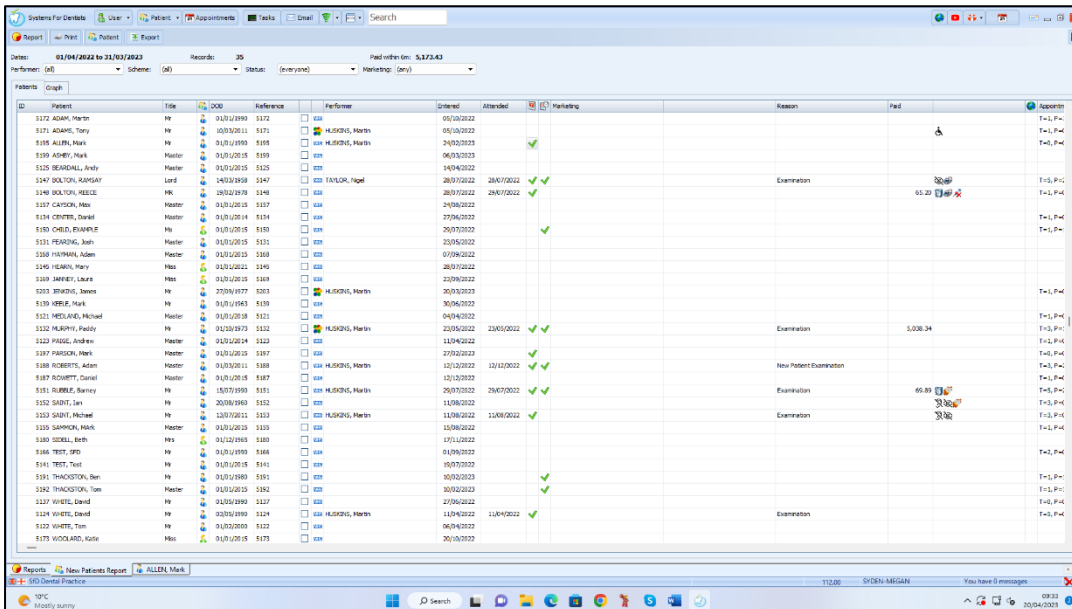Select **New Patients** from the Patient section of the reports screen.
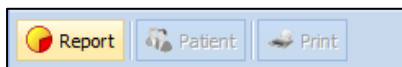
Select report

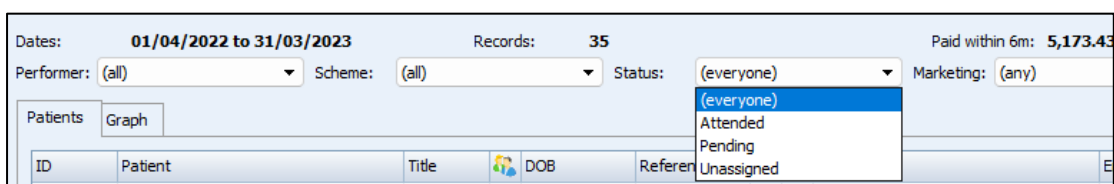Select a **date range** from the drop-down list.

The report will show the data for all new patients in the selected

The report can be filtered by performer, scheme and patient status.

Accounts Report

Turnover

In SFD a report can be created to show the turnover for a specific date range.

Select **Turnover** in the **Account section** of the report screen.
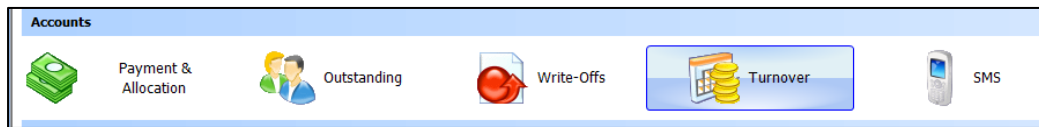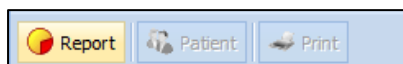
Select **Report**

Select the **date range** from the drop-down list.
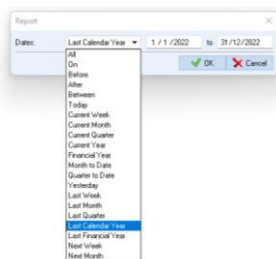
The report will show the **turnover for the selected date range**. The report can be filtered by performer.
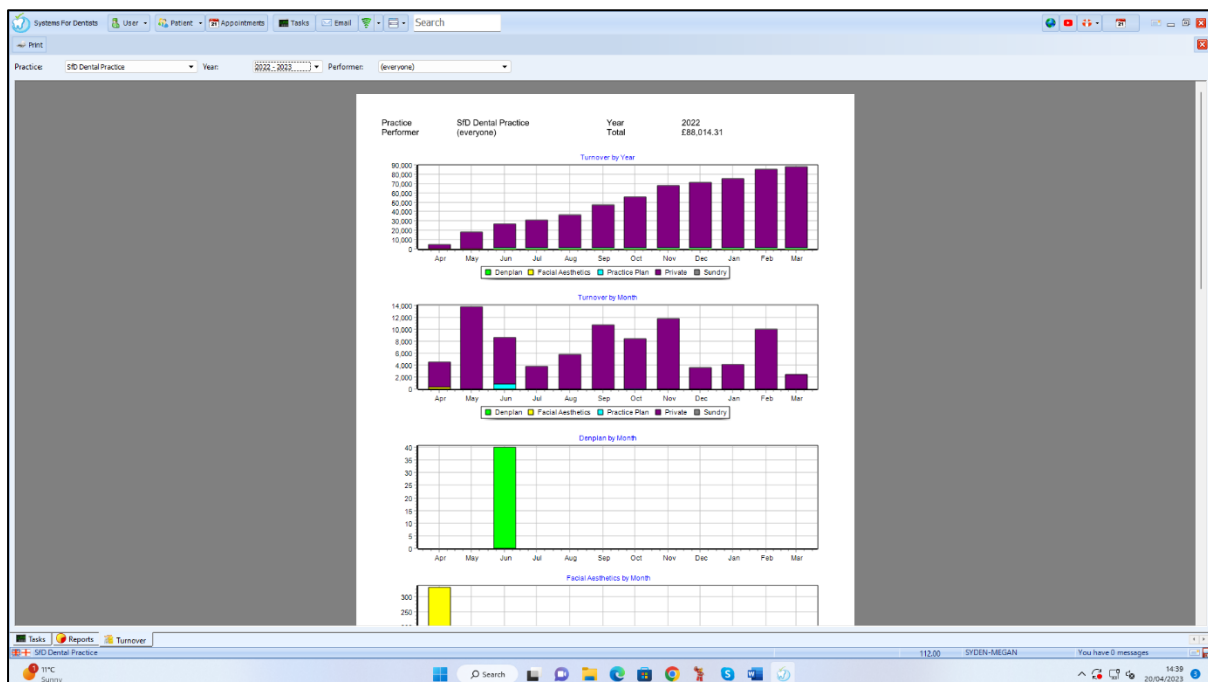
Treatment Reports
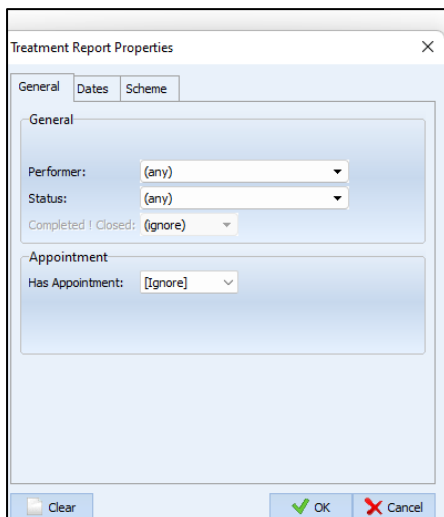
Treatment forms

In SFD a report can be created to find Patients that have open treatment forms and no future appointment. You can filter this report to find courses of treatment whether they are open/closed or and whether those patients have an appointment booked in or not. The report can also be filtered by date range and scheme.
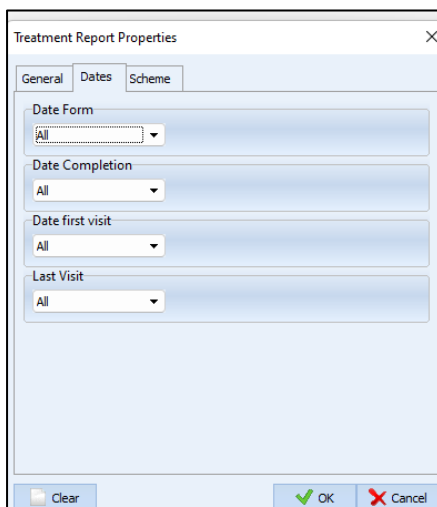
Select **Forms** from the **treatment section** in the report screen.
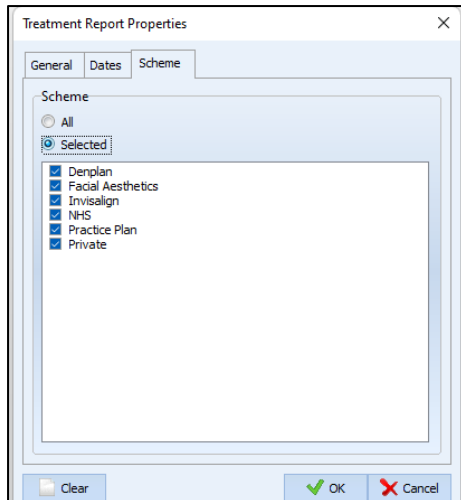
In the **general tab** select the performer, status of the treatment such as complete or incomplete. You can also select if the have an appointment of not.

Date range can be selected from the dates tab.

Patient **scheme** can be selected from the Schemes tab.

The report will display the patients that meet the chosen criteria.

Items

In SFD you can run a report to find out which treatment items have been proposed and whether they have been charged for or not. You are also able to see if performers are undercharging or over charging on items.

Select **items** from the **treatment section** of the report screen.
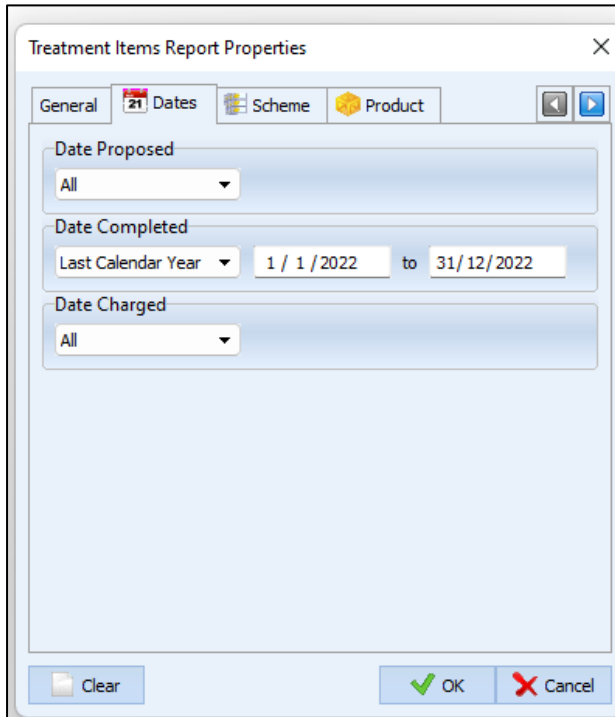
Select **report** to start the report generation.
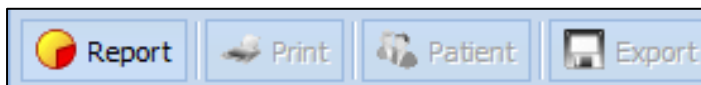
In the **general tab** you can filter by individual performers or view all. **Status** can be set to complete or incomplete treatment. **Charged** can be set as charged or not charges. **Change of prices** can be set to look for whether process have been increased or decreased. Select your individual options from the drop down.
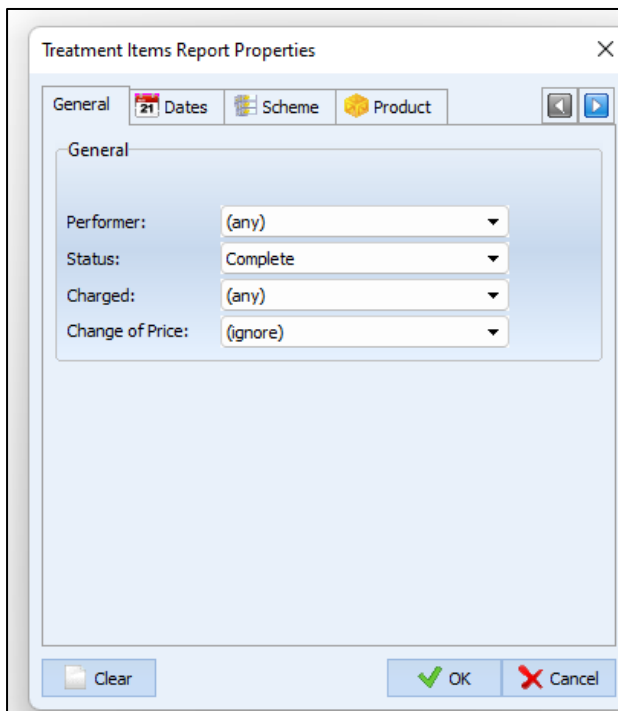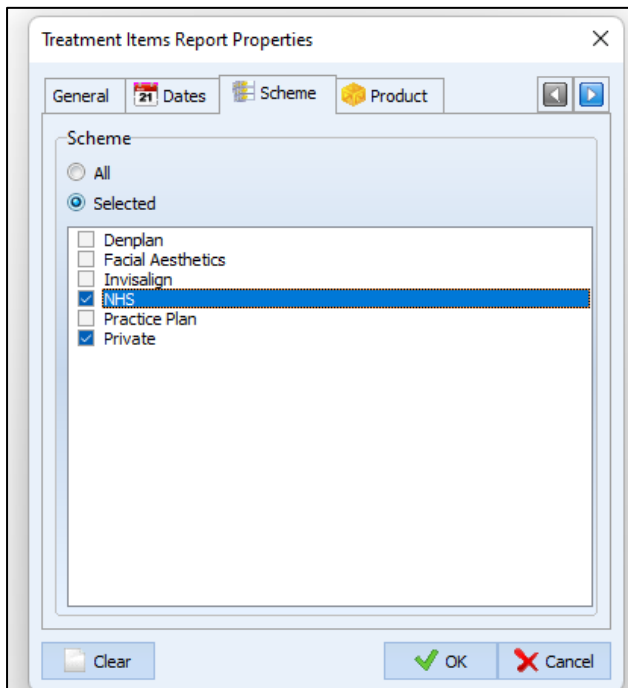
Once your requirements have been selected you can move to the **Dates** tab. From this tab you can chose the proposed dates of treatment, if the treatment has been completed within a certain time frame and whether or not a patient has been charged for the treatment items.
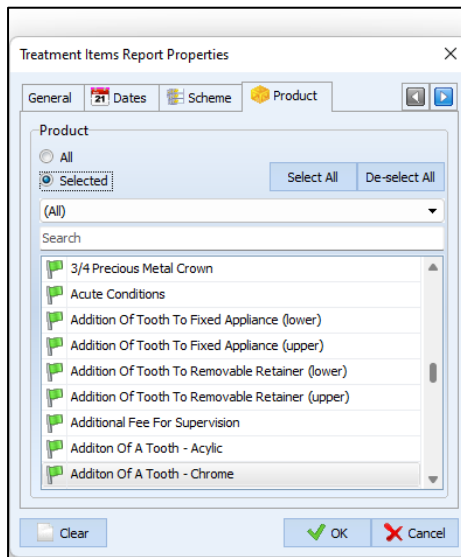
In the **scheme** tab you can select what scheme the patients are on by checking the required boxes.
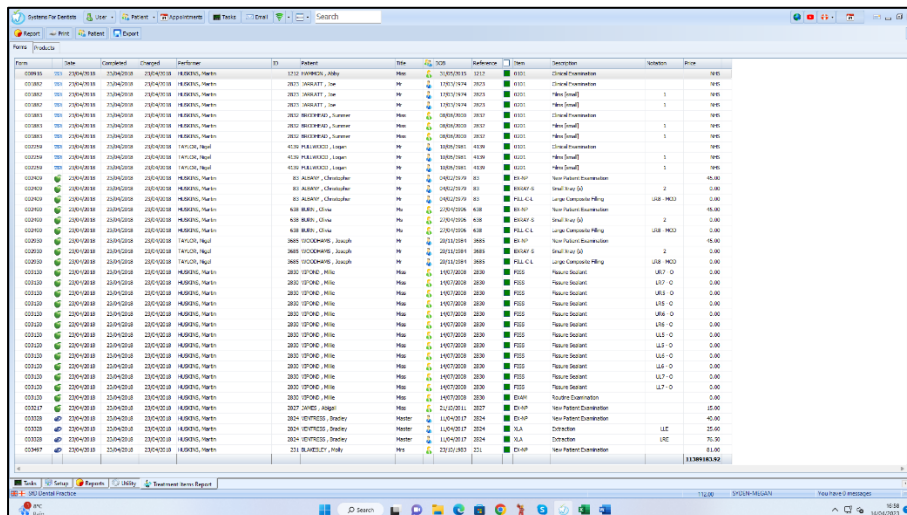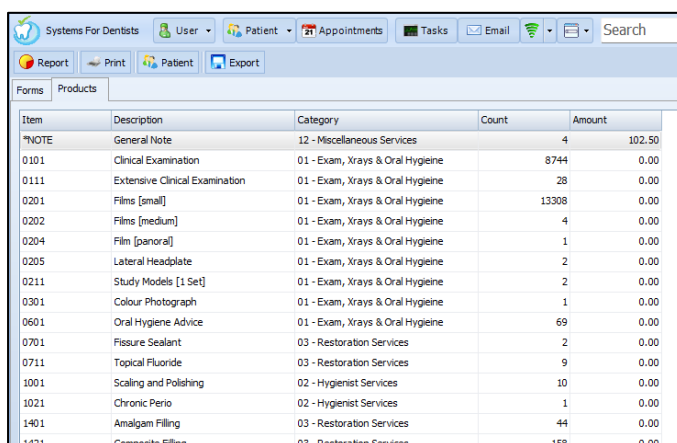
In the **product tab** you can narrow down the report even further by choosing specific treatment or selecting all

The **forms tab** when selected will show treatment items that have been performed in that specific time period based on the date range that has been selected.

If you select the **product tab**. This will show number of items in products. This is how many times each product has been used with the selected time period.

NHS Reports (if applicable)

UDA

If your practice provides NHS treatment then checking UDA/UOA's is an important KPI that a practice manager will need to keep an eye on. There are two reports which a practice will want to keep an eye on which includes the UDA report.

NHS UDA

Select **report** to start the report generation.

Report	Print	Patient	Export
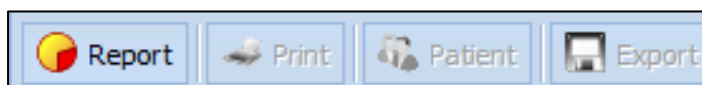
You can then fill in the specific filters required such as contract and also date range.

Select Dates

Dates: All ▼

Contract: NHS Contract ▼

☐ Patients entered in this period

✔ OK   ✗ Cancel

Once the report has run you when then be shown a UDA summary for that date range selected which will show all performers, the amount of UDA/UOA's processed through SFD and also the SDL which is the amount of UDA/UOA's that have been scheduled which reports back into the system from NHS compass.

Dates: **01/01/2023 to 21/04/2023**   Records: **20**

Performer: (all) ▼

Tabs: **Totals** | Summary | Forms | Non-Scheduled | Open Courses

Month	Performer	UDA	UOA	SDL
01/2023	Total	8.00	44.00	0.00
01/2023	HUSKINS, Martin	8.00	44.00	0.00
02/2023	Total	7.00	27.00	0.00
02/2023	HUSKINS, Martin	7.00	27.00	0.00
03/2023	Total	17.00	0.00	0.00
03/2023	HUSKINS, Martin	17.00	0.00	0.00
04/2023	Total	15.00	23.00	0.00
04/2023	HUSKINS, Martin	15.00	23.00	0.00

Within the report there are different tabs available to find different bits of key information relating to the NHS claims.

The **Summary** tab gives the viewer an overview of which types of claims have been sent and what treatments have been claimed for.

The **Forms** tab will then give you a full list of all treatment forms created during the date range the report was ran for. This can be filtered based on performer and it will also give you information as to whether the treatment form has been scheduled or not.

Form	Date	Completion	Performer	Patient	Charge	UDA	UOA	SDL	Date SDL
025642	20/01/2023	20/01/2023	HUSKINS, Martin	REAVES, Louis	0.00		21.00		
025643	20/01/2023	20/01/2023	HUSKINS, Martin	REAVES, Louis	0.00		0.00		
025644	23/01/2023	23/01/2023	HUSKINS, Martin	PRINGLE, William	65.20	3.00			

The **Non-Scheduled** shows a list of treatment forms which have been transmitted through SFD but at this point they have not been scheduled for payment. These are claims that the practice will want to keep an eye on.

Form	Date	Completion	Performer	Patient	UDA	UOA
025642	20/01/2023	20/01/2023	HUSKINS, Martin	REAVES, Louis		21.00
025643	20/01/2023	20/01/2023	HUSKINS, Martin	REAVES, Louis		0.00
025644	23/01/2023	23/01/2023	HUSKINS, Martin	PRINGLE, William	3.00	

The last tab in this report is to show the user the **Open Courses** that have been created within the date range of the report. This report shows who the patient is and also the proposed and completed UDA activity of each form. You can also see if the patient has a future appointment booked as well if they show with a calendar in the last column of the report.

Form	Date		Performer	Patient	Completed	Proposed	📅
025646	25/01/2023		HUSKINS, Martin	MALBROUGH , Sophie	0.00	0.00	📅
025648	26/01/2023		HUSKINS, Martin	KINDRED , Joe	0.00	0.00	📅
025653	01/02/2023		HUSKINS, Martin	GILBERT, Archie	1.00	1.00	📅
025660	10/02/2023		HUSKINS, Martin	THACKSTON, Francesca	1.00	1.00	📅

UDA Summary
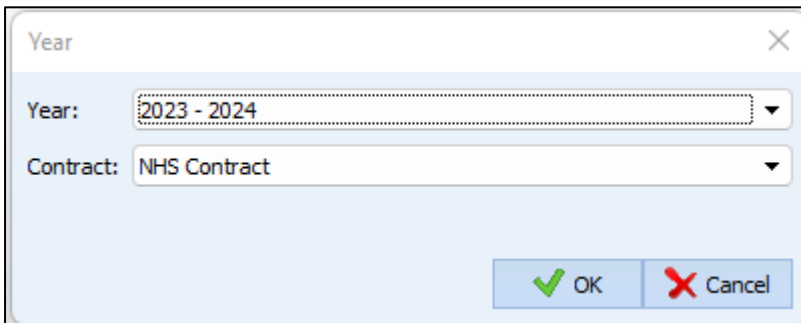
The UDA Summary report is very similar to the UDA report but this report can be run for the contract year only.

NHS UDA Summary

Select **report** to start the report generation.

Report | Print | Patient | Export
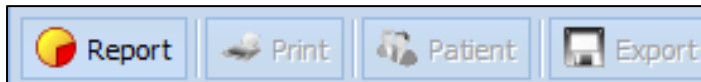
You can then select which contract to report on and also which contract year.

Year	
Year:	2023 - 2024 ▼
Contract:	NHS Contract ▼
	✔ OK ✖ Cancel

Once the report has completed processing you will then get a summary of the contract per month.

Month Total | Week Total | Summary | Forms | Non-Scheduled | Open Courses | By Category | Removed From Schedule Report

	Year Performer Name				2022/2023 (all)			
Month	UDA	SDA	Target	%	UOA	SOA	Target	%
April	18.00	0.00	0.00	7.83	50.00	0.00	0.00	14.84
May	42.00	0.00	0.00	18.26	65.00	0.00	0.00	19.29
June	6.00	0.00	0.00	2.61	21.00	0.00	0.00	6.23
July	18.00	0.00	0.00	7.83	0.00	0.00	0.00	0.00
August	31.00	0.00	0.00	13.48	0.00	0.00	0.00	0.00
September	50.00	0.00	0.00	21.74	44.00	0.00	0.00	13.06
October	24.00	0.00	0.00	10.43	21.00	0.00	0.00	6.23
November	9.00	0.00	0.00	3.91	0.00	0.00	0.00	0.00
December	0.00	0.00	0.00	0.00	65.00	0.00	0.00	19.29
January	8.00	0.00	0.00	3.48	44.00	0.00	0.00	13.06
February	7.00	0.00	0.00	3.04	27.00	0.00	0.00	8.01
March	17.00	0.00	0.00	7.39	0.00	0.00	0.00	0.00
Total	230.00	0.00	0.00		337.00	0.00	0.00	

This will show the amount of UDA/UOA's claimed through SFD during this contract year and also the SDA/SOA (Scheduled) received for those claims. This will also show how the practice has performed against targets which can be set for the practice and also the individual dentists. This report can also be filtered based on performer so you can focus on particular dentists' performance.

The UDA summary report includes some of the same tabs which are in the UDA report so you can find out the same information but as an overall of the contract year selected. There are some additional tabs however for further breakdowns such as **Week Total** and also the ability to filter claims based on treatment types etc in **By Category**.

Documentation Creation introduction

When you are within the setup page of SFD you will have the option of "document" this is where you will edit previously created documents and create brand new templates on the system.
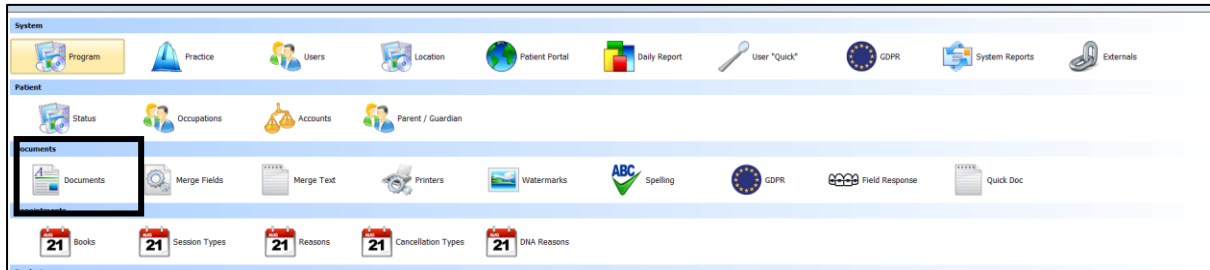
How to open and edit previous documents
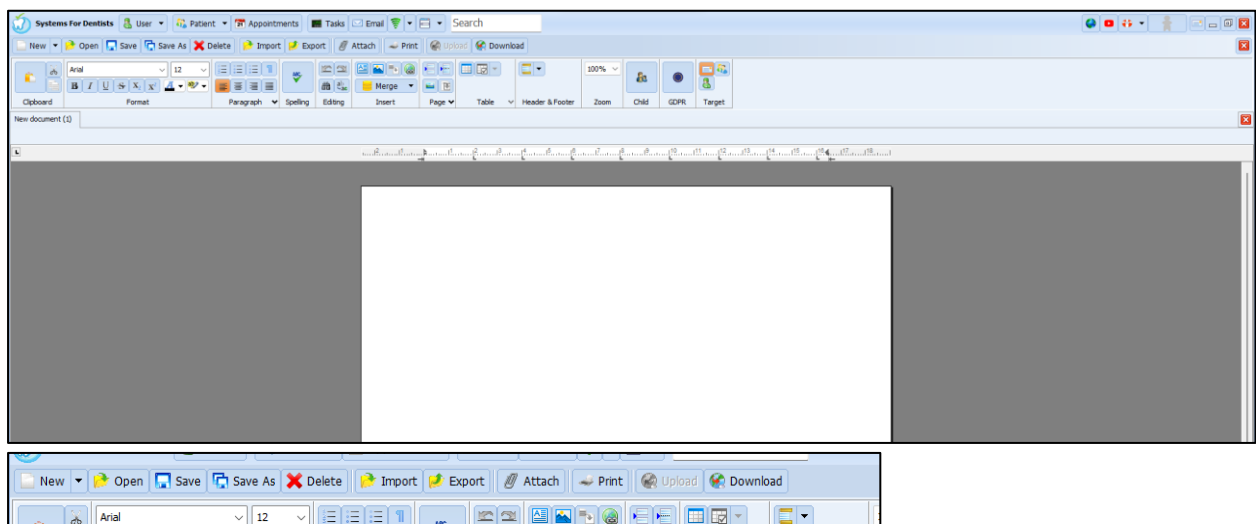
On the documents section you have a main bar which controls how you open existing templates and how you can go about saving new ones.

When you choose the "**open**" option you will be presented with a list of already existing templates on the software these can all be opened and edited.

As you can see here you have a bunch of templates on the system that may of previous been created by members at the practice.

To edit any these templates you double click on them and it open the document ready to edit.
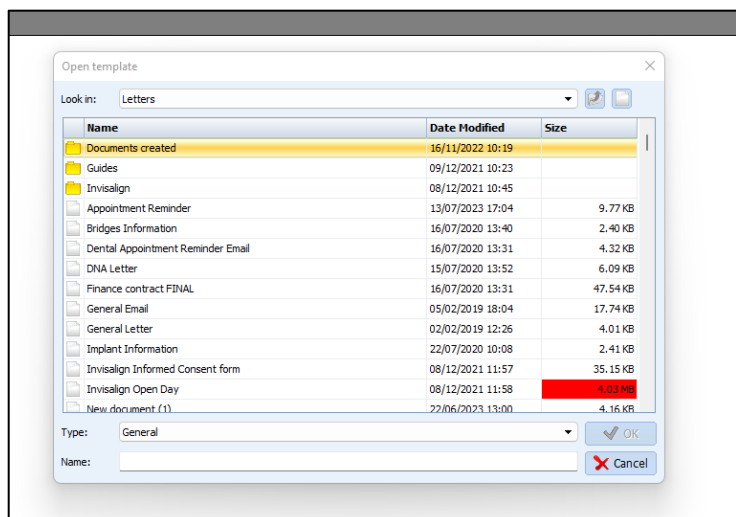
Adding merge fields to a document

Once you open a document it will come forward for you to edit it looking like this:
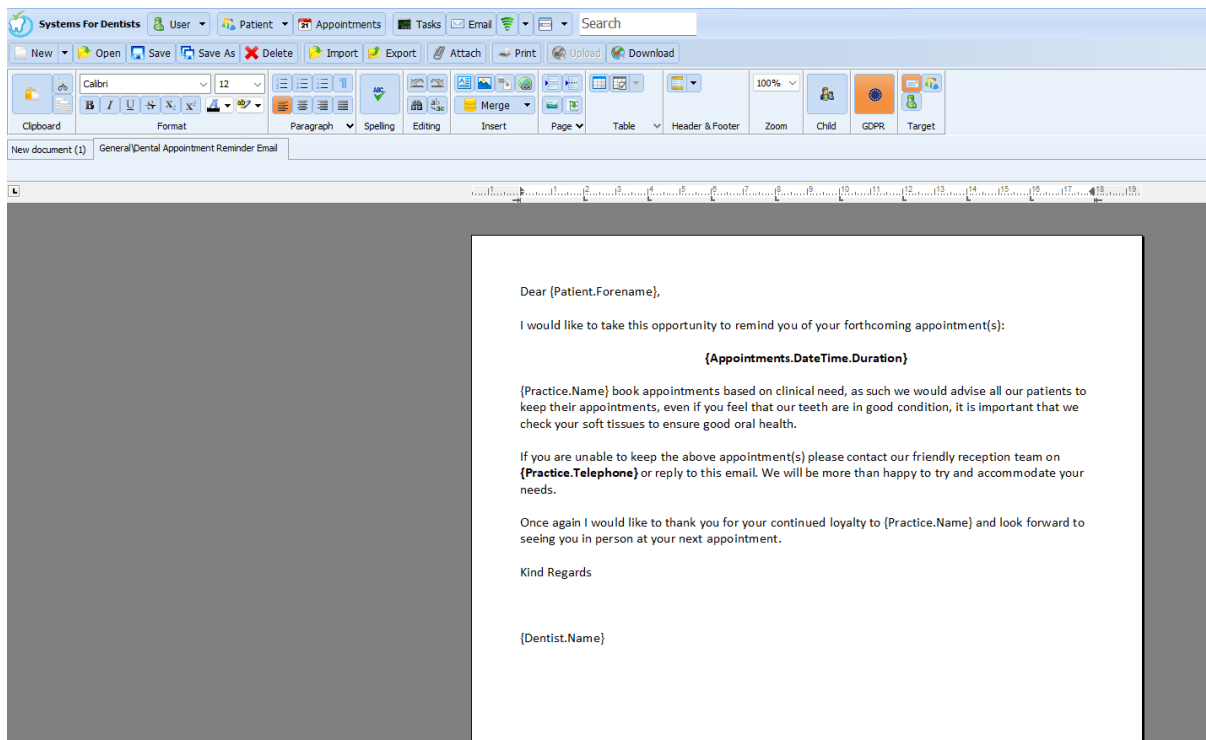
As you can see, we have information within "{}" on the document these are classed as merge fields on the system. This will automatically pull in the information that is associated with that merge field once the document is created on the user's profile.

There are many options to add in merge fields on the system it may be worth having a look around those options when creating a document as it should have the information you may want to pull into a document that is specific to each patient.
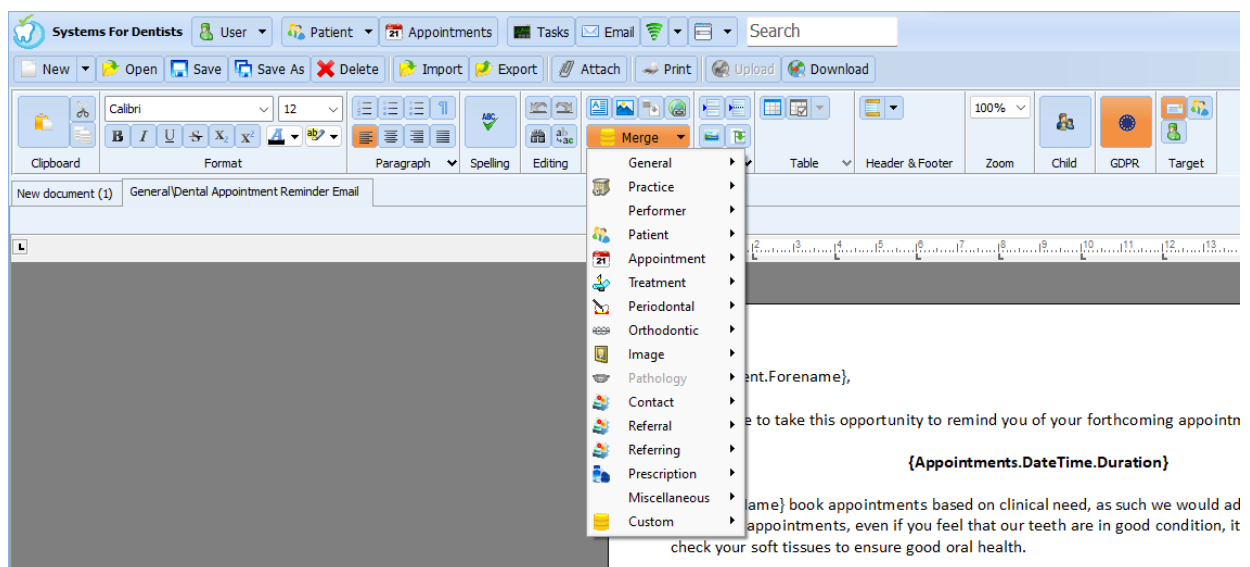
If you make a mistake and add in the incorrect merge field to delete/ remove it you need to highlight the merge field and then select "delete" on your keyboard to delete the merge field.

How to add a header and footer into a document

When you are on the document creation part of the software you will have an option along the editing bar which will allow you to create both a header and footer on the system

Once these are selected the document will then allow you to add in the header and footer onto the document which will apply to each page like a word document usually would.

How to create a new folder within the templates section
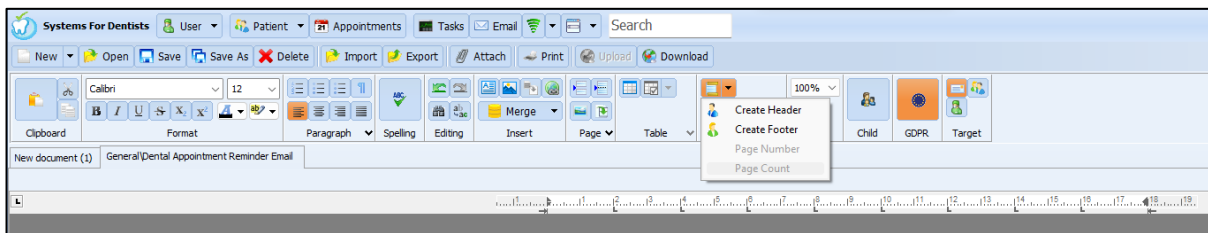
When you go to save a document on the system you may want to arrange them in such a way that makes looking at your templates a little easier. Now creating a folder within here is not the most obvious thing to do however, it can be done.

When we go to save a new document, you will have a button which appears to be greyed out on the system but this is the button to create a new folder on the system as highlighted below:

Enter a new folder name and from there you will be able to save the templated to that folder on the system going forward.
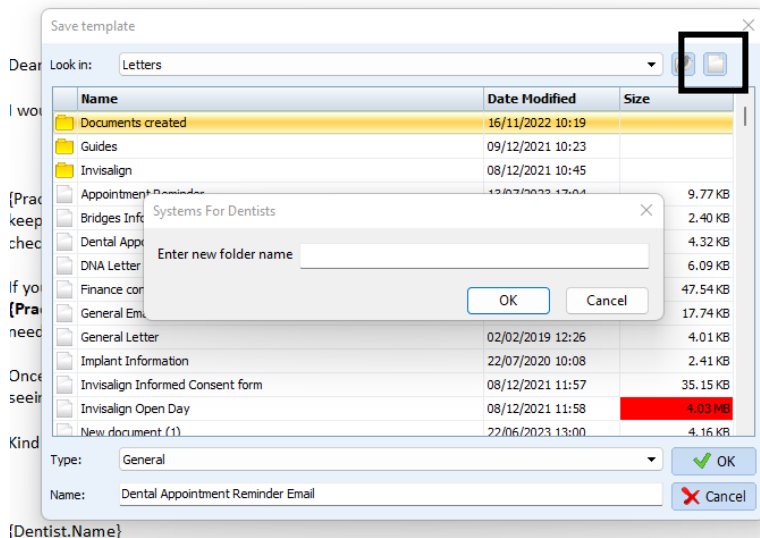
Setting a page template for each document

When you are in SFD you may want to add a default template that applies to all documents so you always have a header and footer on the document without having to create it each time you create a new document.

To do this you will need to create a base document with your header and footer on. To do this you will have to select "New" in the top left hand side of the software to create your new document.
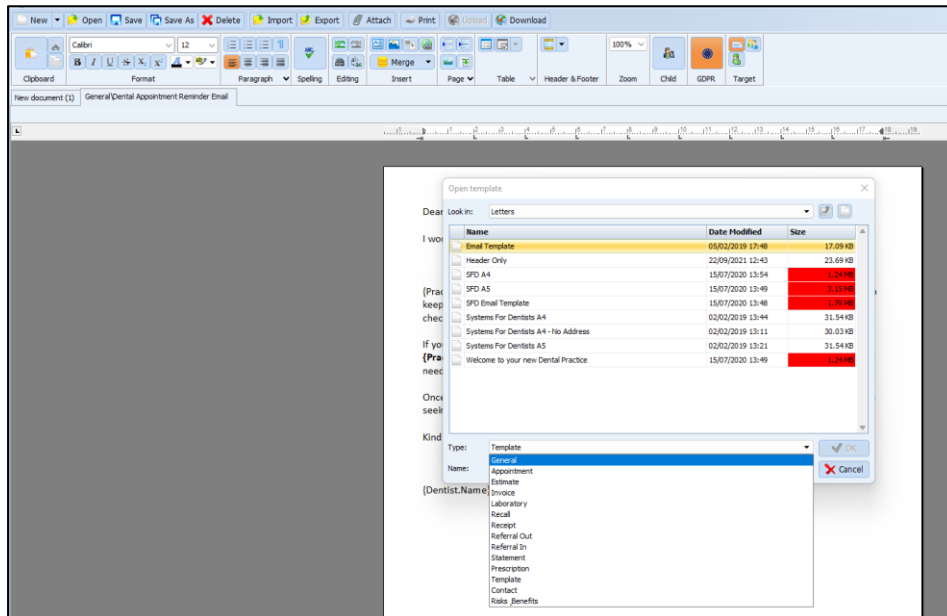
Once you have adding in your header and footer to the new document select "save as" and change the drop down to "template" this is where you will save your document.

Too apply this to a document load an existing document and select the option highlighted below:
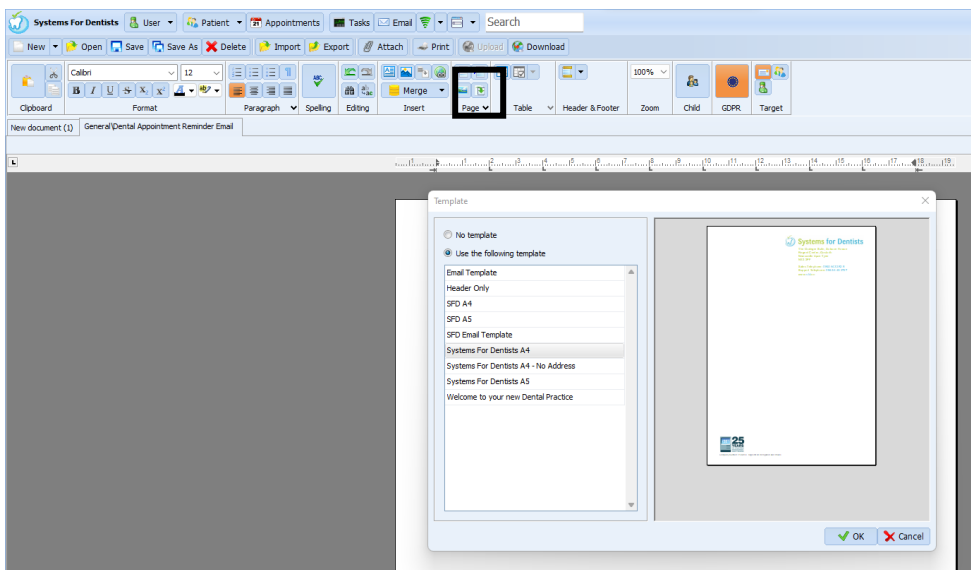
From there you can select from a list of templates which are on the system and apply it to your document. You will not see the template until you generate if on a patients profile.