Systems for Dentists

A Receptionist Guide to SFD

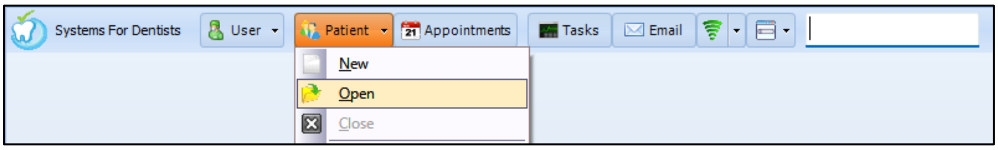
Contents

Basic patient information

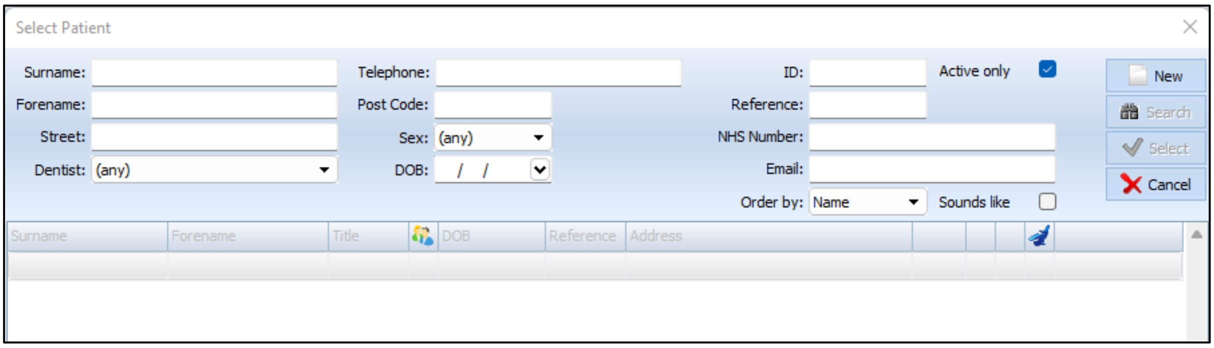
How to search for a patient

To search for a patient record in SFD the user needs to select the **Patient** option on the main menu of the system.

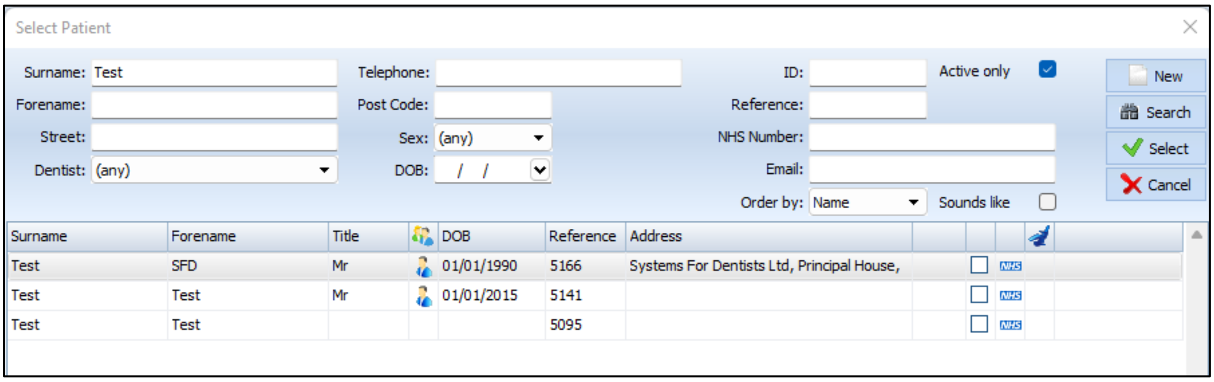
Once selected it will present a menu including the option to **Open**.



This will then display a search box on screen with a number of different filters such as Surname, Forename, D.O.B and Postcode. Simply enter the patients details into one of the filters and click **Search** or hit enter on the keyboard



You will then see a list of patients who match the criteria of your search displaying their key details. To open the patient either double click on their record or left click once on the patient and click on the **Select** button on the right of the search window.

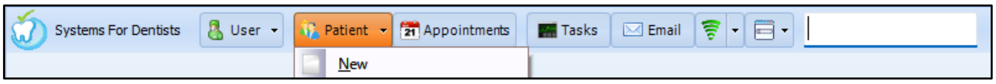


The patient you have searched for will now be displayed on screen.

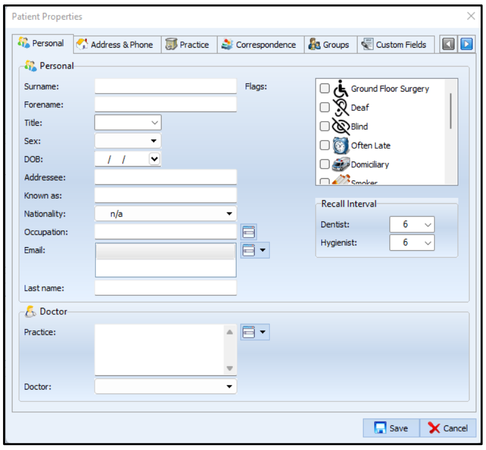
How to create a new patient

To create a patient record in SFD the user needs to select the **Patient** option on the main menu of the system.

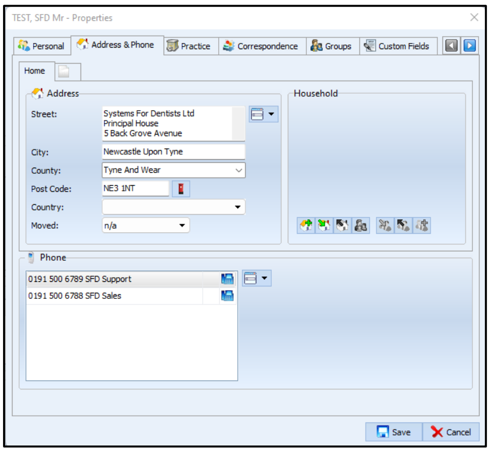
Once selected it will present a menu including the option to **New**.



This will then display a blank patient properties window allowing the user to input the new patients details onto the system. The initial tab will be the **personal** tab where it will ask the user to input the patients name, gender, D.O.B, email etc.



Once complete on the **personal** tab, the user can then progress to the additional tabs such as **Address & Phone** to populate other key patient information.

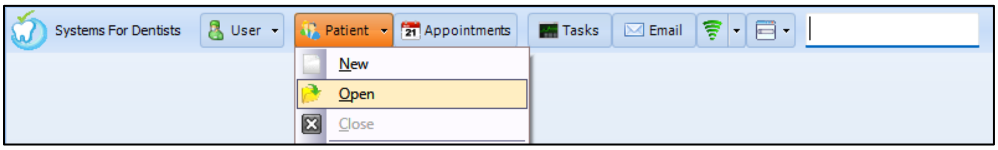


When all the patient information has been added to the new patient form, the user can **save** the record by selecting the **Save** button displayed on the bottom of the patient properties screen.

This will then create the patient record and display the record details on screen.

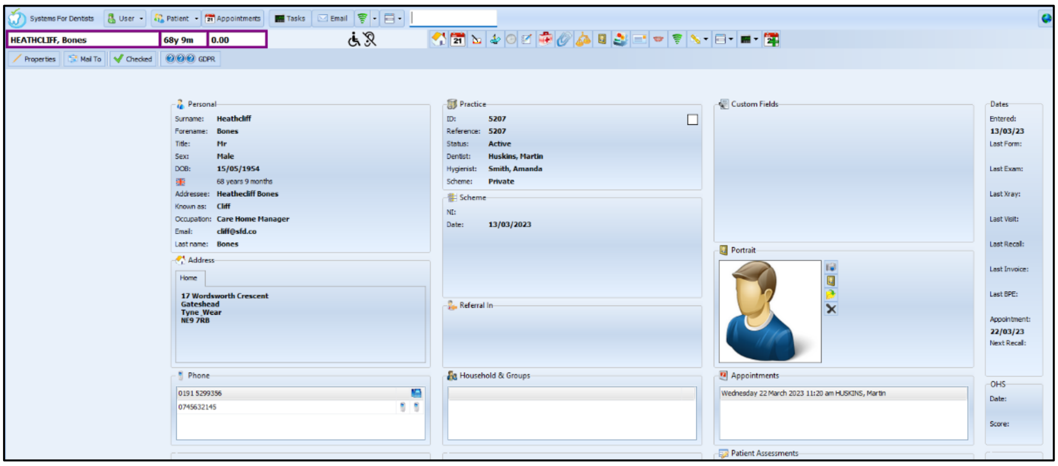
How to edit patient details

To edit a patient record in SFD the user needs to search for the **Patient** using the option on the main menu of the system. Select **Patient** and **Open**. Search for the patient as previous described.



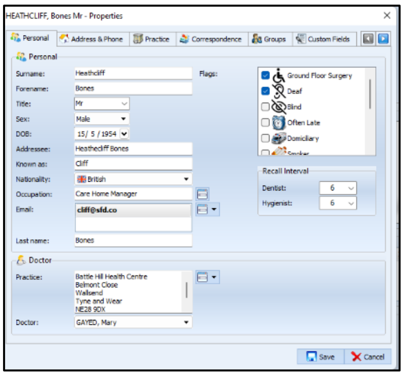
Alternatively, the user can search for the patient by entering the Surname, DOB, Telephone number or postcode in the **search box** on the main menu.

When you have located the patient record click to open. The patient record will open on the **patient details** page. Important dates can be seen to the right of the of the patient



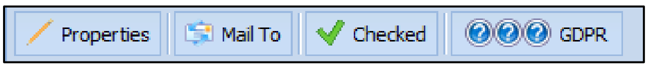
To edit the patient information, **double click** on the section heading i.e., **Personal**.

This will open the patient properties window. The user can edit the patient details in each tab as required.



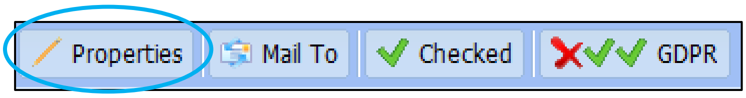
Click **save** when the edits to the patient properties have been complete.

Alternative clicking the **properties** buttons on the **patient record menu** will open the patient **properties edit window**.



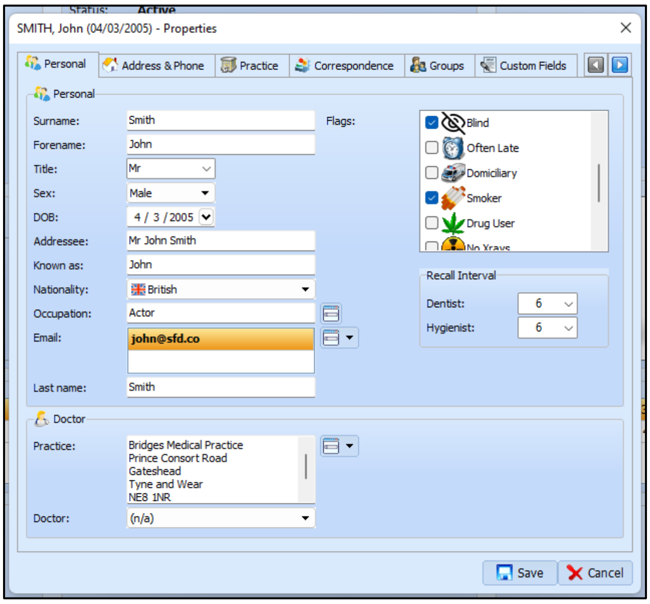
Patient properties tabs

All of the patient details can be entered and edited in the properties window. This window can be accessed by double clicking the section titles on the patient home screen or by clicking the properties button on the patient homescreen.



The properties window has several tabs which need to be populated with patient information.

Personal



Personal information will contain Name, age, sex and patient flags.

Occupations can be added by clicking the further options button , select an occupation from the list.

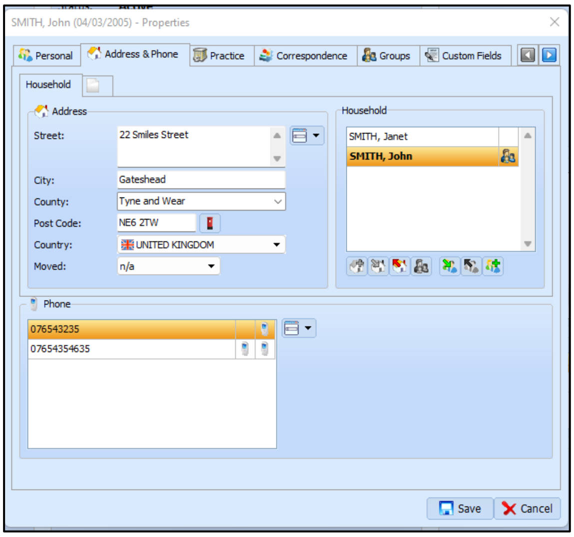
Email address can be added, deleted and edit using the further option buttons .

Patient flags can be customised using the setting features. These flags are used as quick key indicators of patients needs and factors that may impact care and treatment. The flags can be checked as required in the personal tab.

Doctors' information should be prepopulated with practices within a 5 miles radius of your dental practice. Select the further options button  to choose a practice from the list.

Note: Due to storing medical information, Sex assigned at birth needs to be stored. However, if patient identifies with a different gender Mx can be used as a patient title instead of Mr or Mrs. Patient flags could be added to indicate people preferred pronouns. You can also use the custom fields to identify and store information about genders and pronouns.

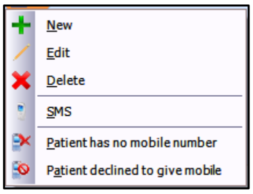
Address and Phone



The address and phone tab allows you add contact details and create household family groups.

To add an address, enter the postcode and click the post-box button , then select the house number from the drop down.

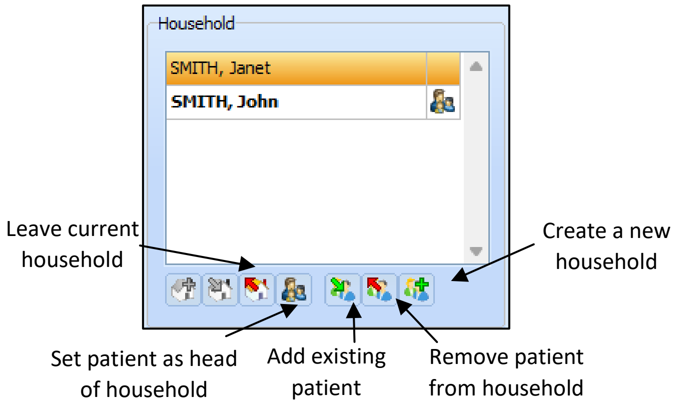
Add, edit and delete telephone number by selecting the further option buttons .



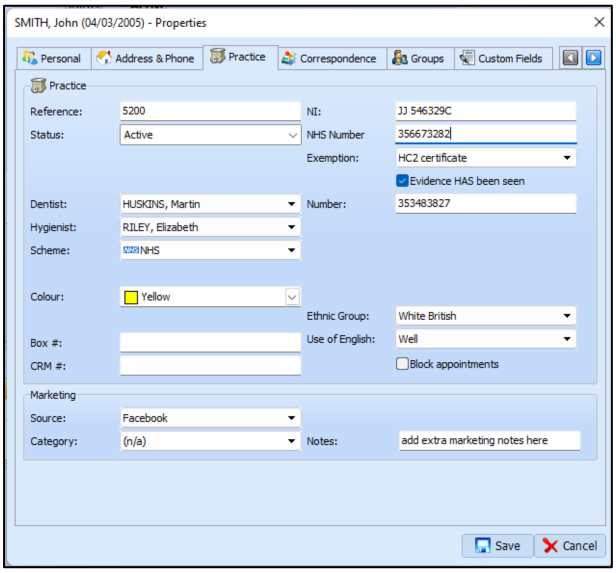
Choosing the default telephone can be achieved by selecting the telephone number and selecting SMS from the further option drop down as shown above. If you only have one telephone number it will automatically default to this number. Mobile number are preferred for SMS messages.

A family group can be created by selecting the buttons as shown below

Once a group is created you can assign one member to be the head of the household, add existing patients to the family group, remove a patient from the group and add a new patient to the group ***Note: this option will also create a new patient record***.



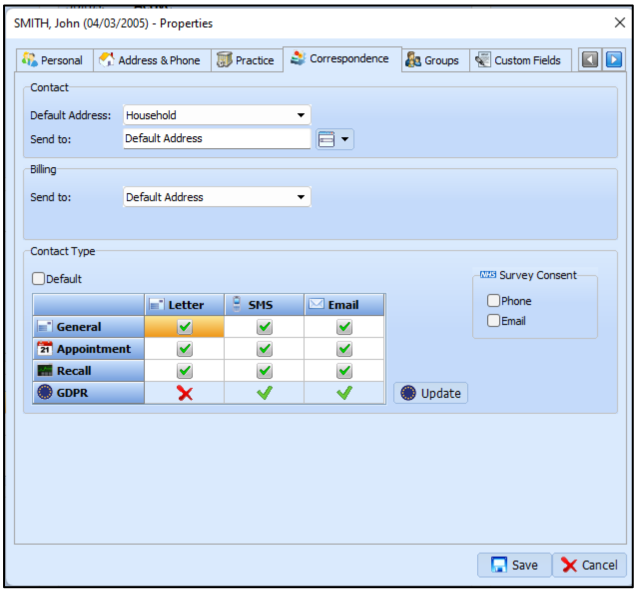
Practice



This tab allows you to set the status of a patient, assign a dentist/hygienist, set a scheme and fill in exemption details. Marketing information can also be filled in as this allows you to create a marketing report in the report setting.

This tab in the properties window also allows you to **block appointments**. This will not remove the patient record, but it does stop the ability to book an appointment for this patient. Normally reserved for bad debts or abusive patients.

Correspondence

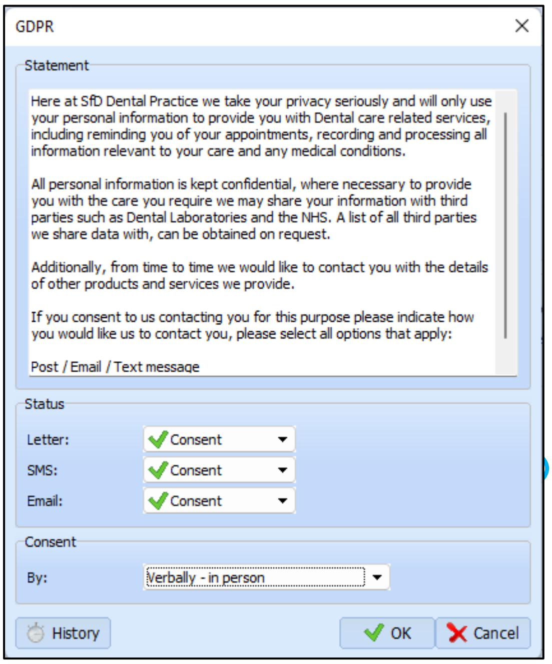


The correspondence tab allows you to set patient communication preferences.

The **sent to**: drop down allows you to set the default address or if it is a child’s record you can choose parent or guardian from the list.

The contact type allows you to choose which method of contact they prefer depending on the type of communication, check or uncheck each method. Alternatively check to default box to select them all.

The GDPR information can be updated by clicking the update button. This allows you to store a patient contact preference.



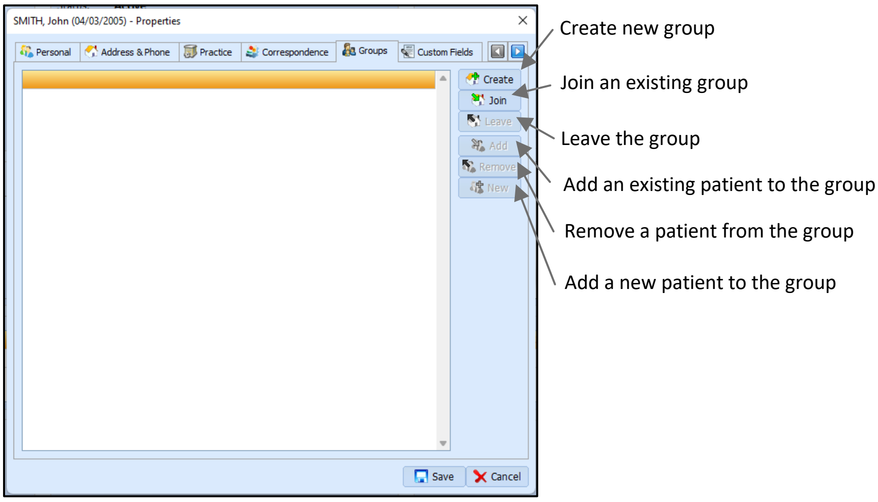
The GDPR statement can be personalised to your practice. Choose patient preference for each communication type.

Choose the consent type from the drop down and click ok to store the preferences.

The updated GDPR information will show at the top of the patient record on the toolbar.

Groups

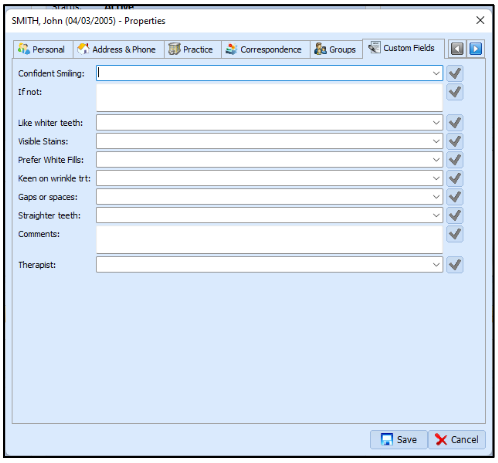
The groups tab allows you group patient together that are not family/household groups. Typically used for domiciliary.



Customs field tab

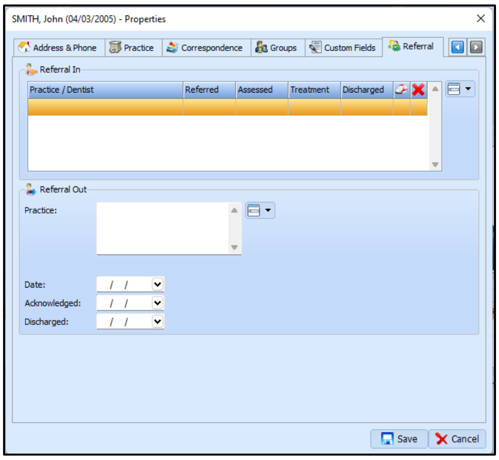
This tab is customisable, the questions can be created in the systems setting. Practices can choose addition questions they wish to ask new patients. Commonly used for marketing purposes, but it can be used as the practice chooses.

The questions can be answered using the drop down for each question.

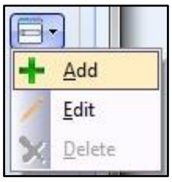


Referrals

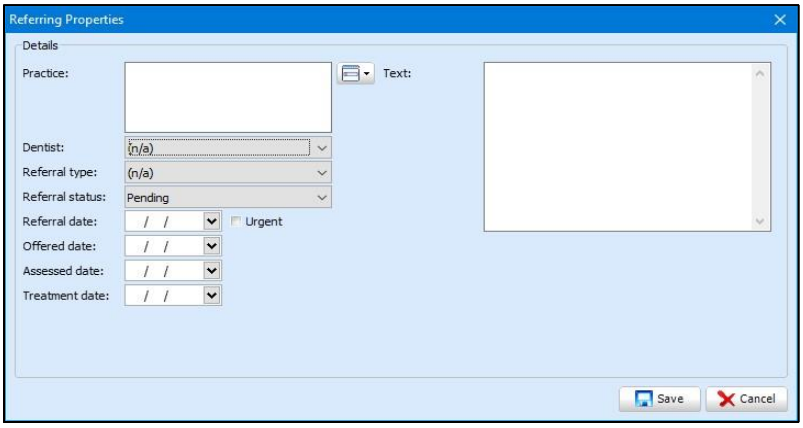
Finally, we have the **Referrals** tab. Within this page you can add the patient's referral dentists (both inbound and outbound). It is important that you fill out this information as accurately as possible as you have the ability to run both inbound and outbound referral reports.



To add an inbound referral, click on the split button in the **Referrals In** section.



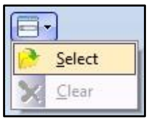
Click **Add**. You will then be presented with the following window.



Once you have added the necessary information into the window click the **Save** button in the bottom right-hand corner of the window.

The inbound referral will now be present within the below window.

To add an outbound referral, click on the split button in the **Referrals Out** section.

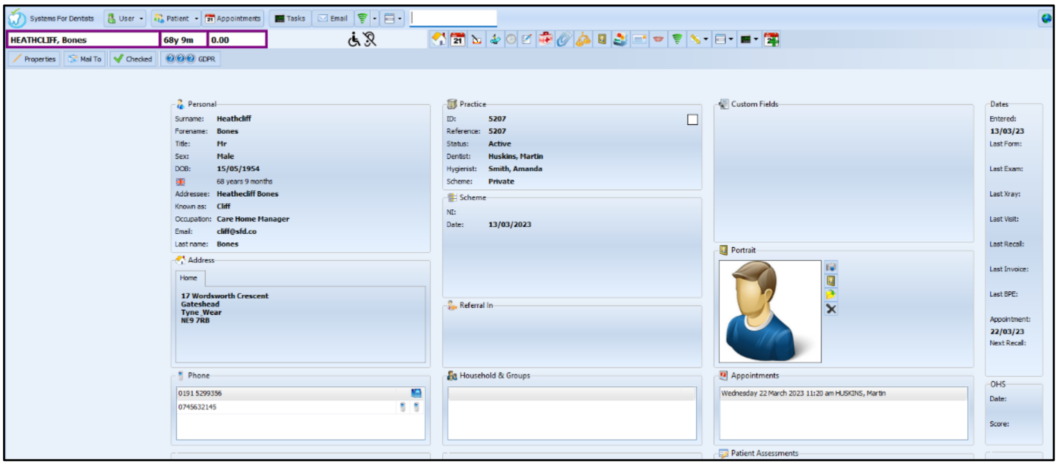


Click **Select**. You will then be presented with a list of your referral dentists. Select from the list then click **OK.**

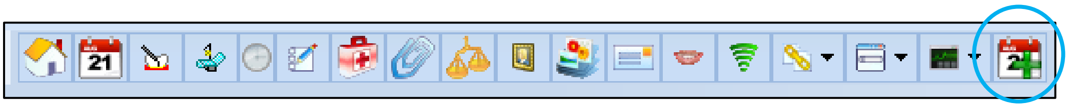
After you have entered all your information into all tabs click **Save**. Your new patient has now been created.

How to book an appointment

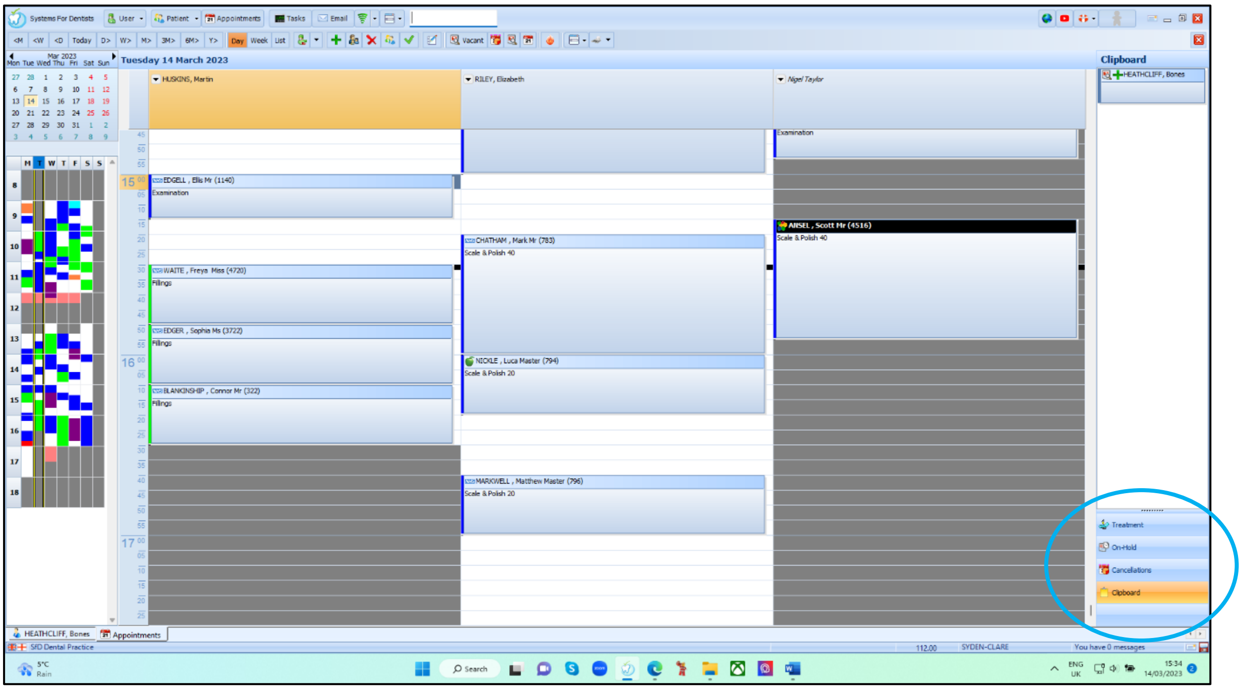
To book an **appointment** for a patient in SFD, **search** for the **patient record** as previous described. Open the patient details.



Select the **Add patient to clipboard** button from the patient main menu tool bar.

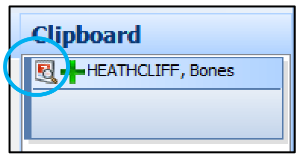


Once this button is pressed the patient will be added to the **clipboard** in the **appointment book** and the appointment book will automatically open.

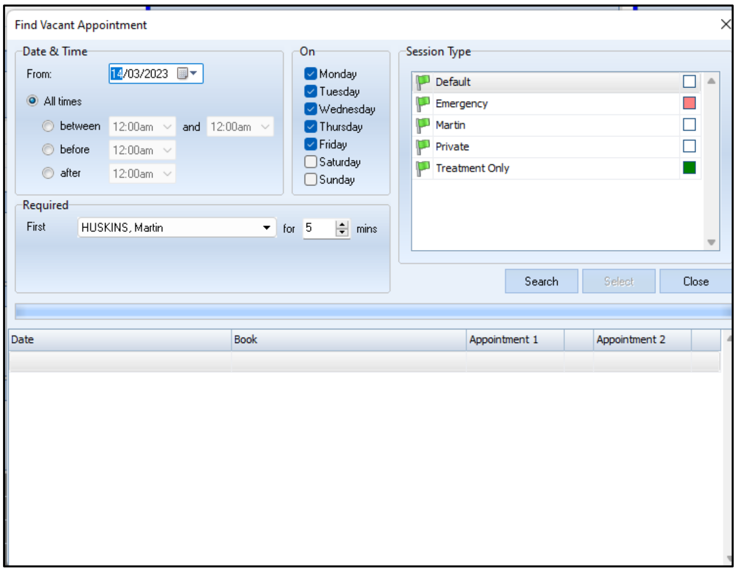


The patient can be **dragged** from the clipboard to a vacant slot in the **appointment book**.

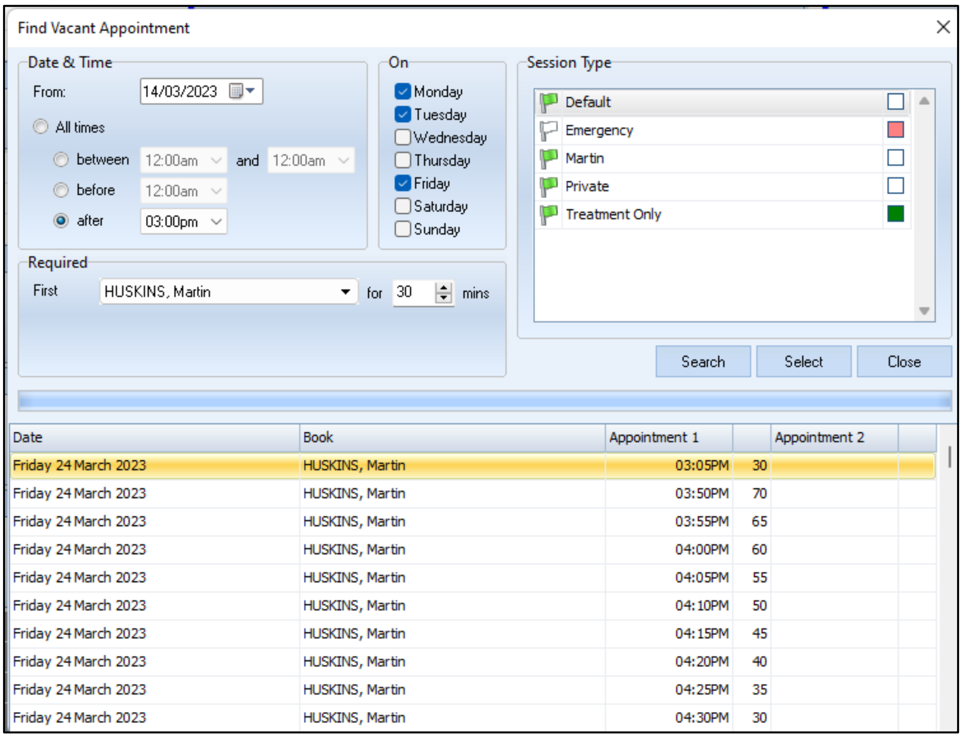
Alternatively click on the **search icon** next to the patient's name. This will allow the user to search for available appointments.



Once the **search** button has been selected the **Find Vacant Appointment** window will open.

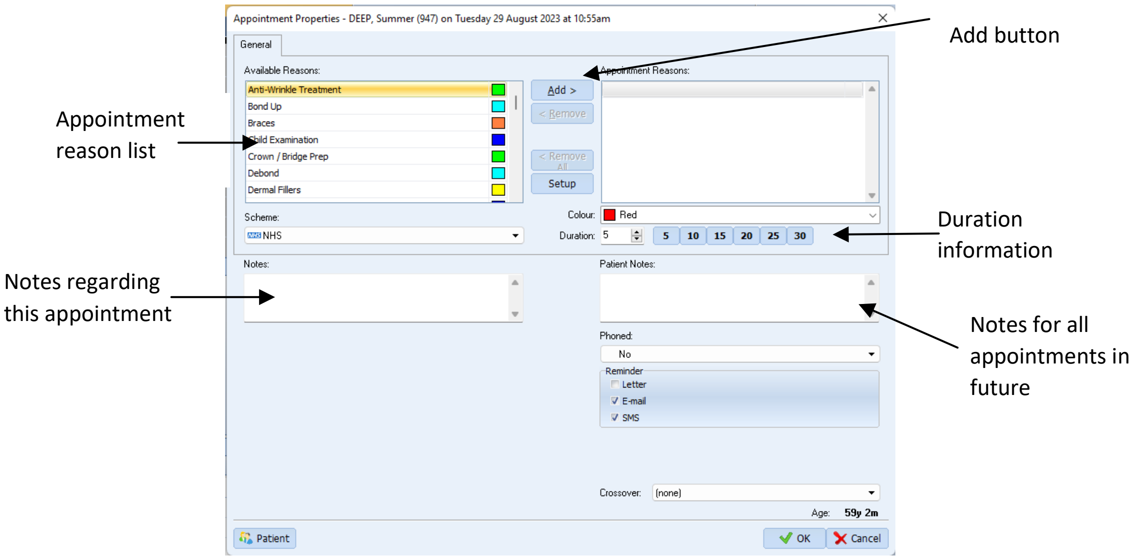


Enter the appointment requirements specific to the patient and the number of minutes required for the appointment, then select **search**.

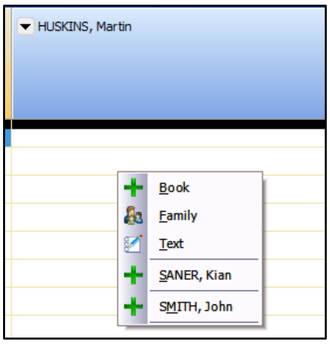


Once **search** has been selected, the window will be populated with the available slots for that dentist.

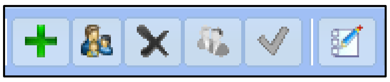
Double click to select the suitable slot and the **Appointment Properties window** will appear. Select the appointment reason from the left and click add, set the duration and enter any necessary notes.



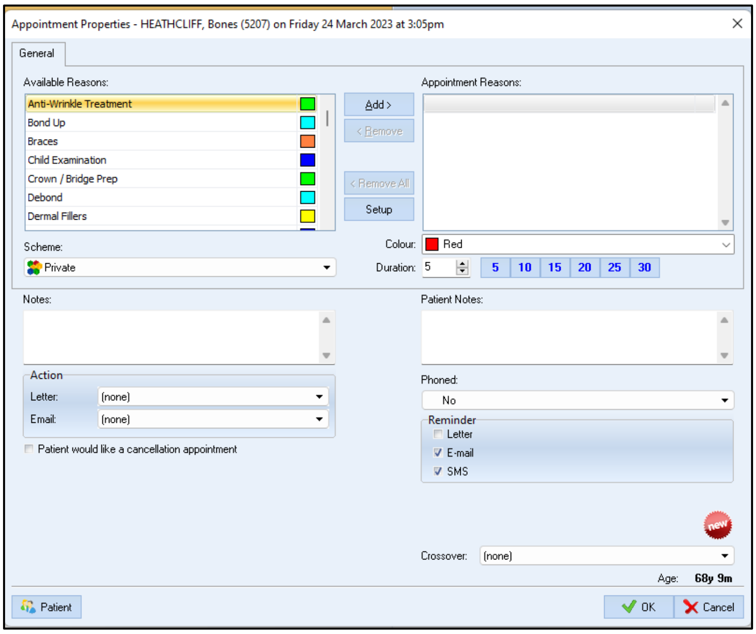
Alternatively, you can right click on an appointment slot and select book from the drop-down menu.



You can also book appointment by selecting an available slot and clicking book on the toolbar



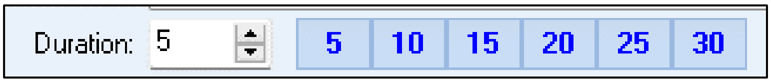
Once your slot is selected the **appointment property window** will appear.



Select the **reason** for the appointment and select **add**.

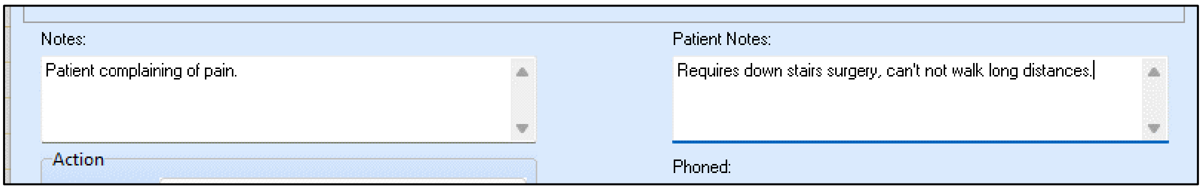
Select the **scheme** that the patient is on using the drop down.

Add the **duration** time of the appointment using the quick selection buttons, manual typing in the duration or using the arrows to adjust.



Notes can be entered that will be specific to that appointment in the notes box on the left.

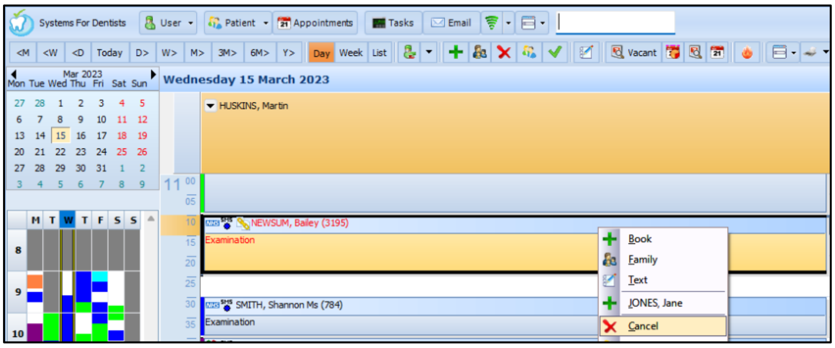
Patient Notes can be entered that will show in all future appointment booking in the patient notes box on the right.



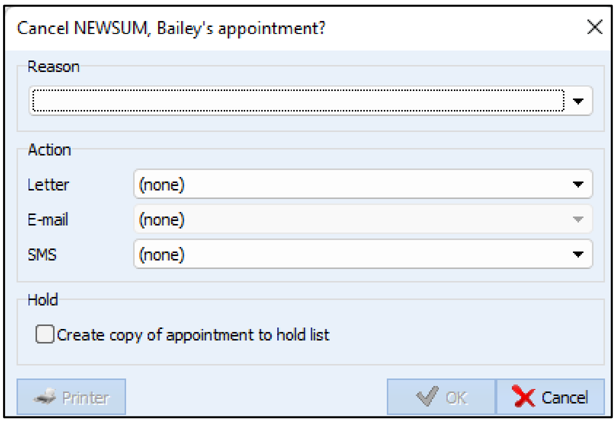
Select **ok** and the appointment will be placed in the appointment book.

How to cancel an appointment

To cancel an appointment on the same day in SFD. Go to the **appointment book** and find the appointment. **right click** on the appointment.

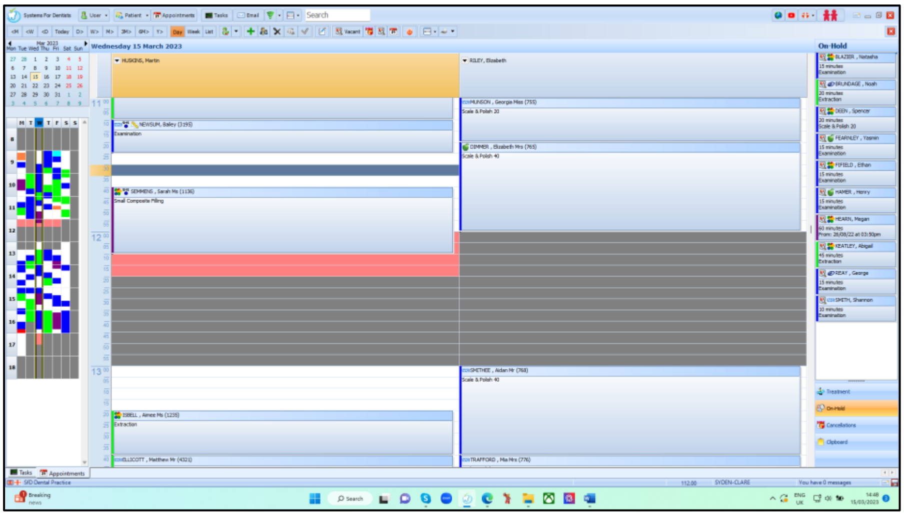


When the popup menu appears, select **Cancel.**



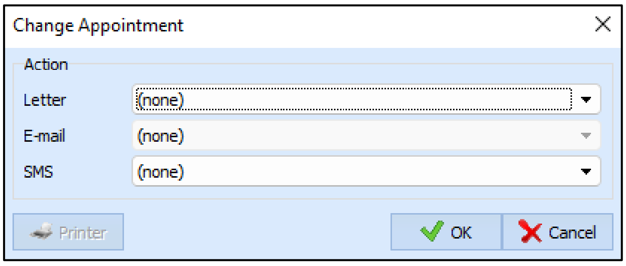
Select the **Reason** for the cancellation from the drop-down options. Choose the method of confirmation from the drop down in the actions section.

If a patient is cancelling an appointment but wishes to reschedule at another suitable time, check the **Create copy of appointment to hold list** option. This will place the patient in the **On hold** section of the **clipboard.**

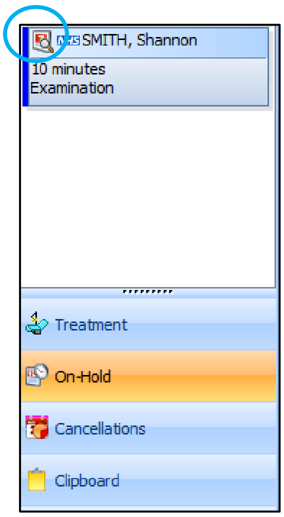


A new appointment can be selected from **On hold clipboard** by clicking and dragging the patient to an appointment slot.

This is the window that will appear when you rebook the appointment.

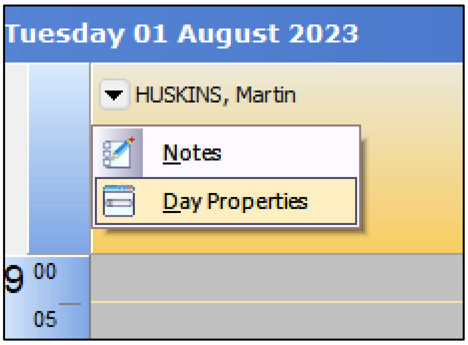


Alternatively, you can select the **Find Vacant Appointment button** and fill in the requirements as previously shown.

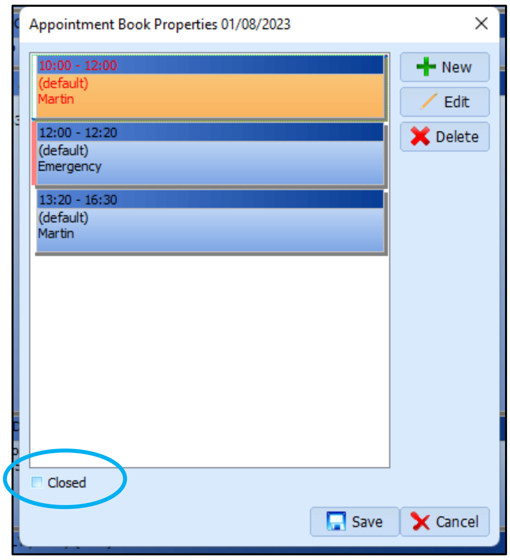


How do I close a day?

You may have a need to close a day due to staff sickness or emergency. This tool can be found in the day properties further options.



Click the black down arrow at the top of a book. Select **day properties**.



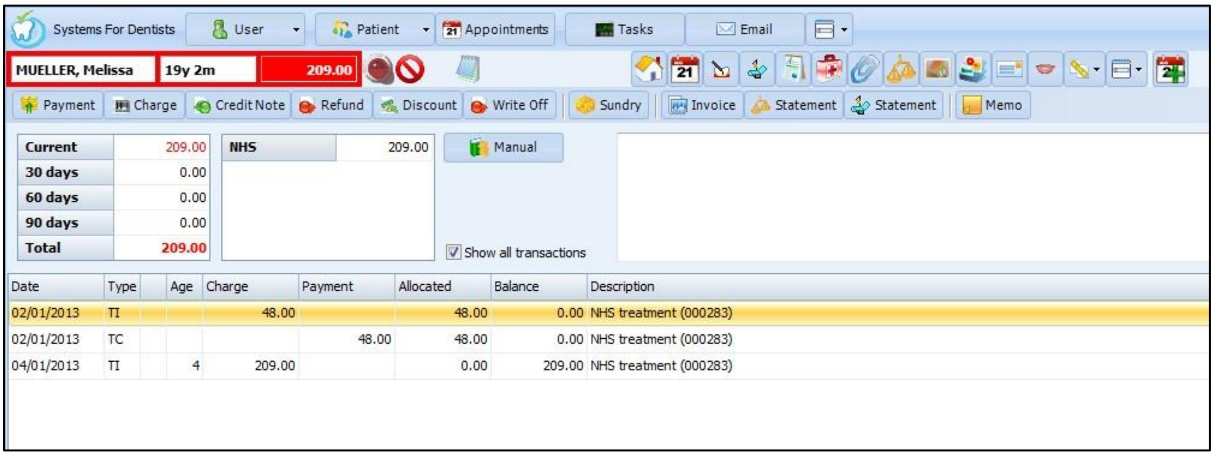
To close the whole day, check the box to close the day. All appointment will turn black and will need to be moved/rebooked.

How to record a payment info and use the accounts

Patient Accounts

It is important to keep a patient's account information accurate in your dental software. To enter the patient account screen, click on the button below within the patient's record.

Below is an example of the patient's account screen.



***Tip:** As the patient accounts are fully itemised in our dental software, we have the historical (paid / complete) accounts items hidden from view by default. This ensures the accounts are easy to read and review. You may need to view the historical items, to do this click the **"Show all transactions"** check box. All transactions for that patient will now be visible, in chronological order.*

Payments

The most frequent function you are likely to use in this screen is the **Payment** utility. As mentioned in the treatment section, invoices are automatically generated from treatment forms, when items are charged.

This updates the patient's balance at the top of the screen (see the example below).

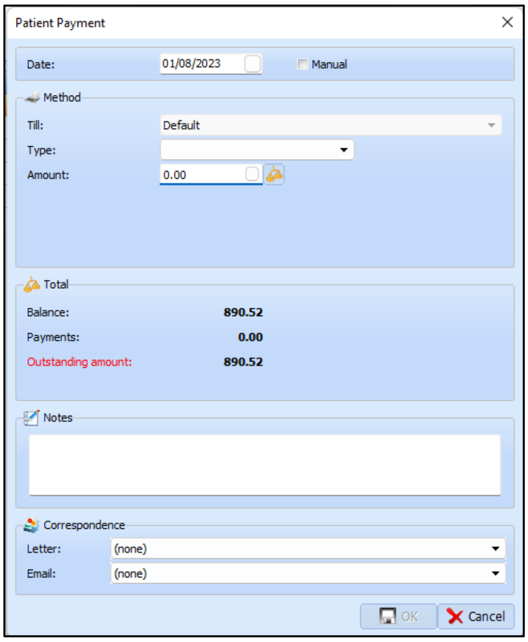
Once you are in patients account section you will see the treatment invoice(s) present in list form.

Date	Type	Age	Charge	Payment	Allocated	Balance	Description
02/01/2013	TI		48.00		48.00	0.00	NHS treatment (000283)
02/01/2013	TC			48.00	48.00	0.00	NHS treatment (000283)
04/01/2013	TI	4	209.00		0.00	209.00	NHS treatment (000283)

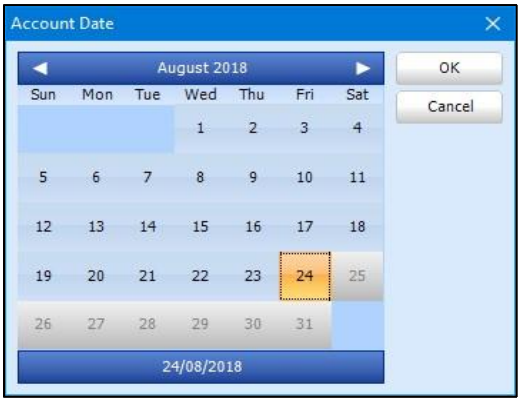
In the example above you can see the patient on 02/01/2013 had a TI (treatment invoice) of £48. However, on the same date they received a treatment credit of £48. Treatment credits occur when treatment items that have been charged are then uncharged. This is normally the case if a treatment item had been added to a treatment form in error.

On 04/01/2013 we have a treatment invoice of £209. This is an invoice that the patient wishes to pay off. To do this click on the **Payment** button towards the top left of the patient account screen.

You will now be presented with the **Patient Payment** window.

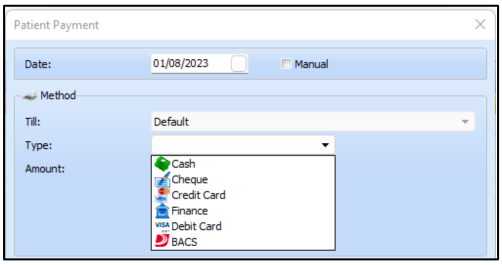


At the top of this window, you have the date, by default it will display the current day. You have the ability to change this if you need to put a payment through for a previous date. Click on the grey square in the right-hand side of the date box to select a date if necessary (the calendar screen below appears).



Select the desired date by clicking on it, and then click the **OK** button.

After the date you have to select the payment method from the **type** drop down list.



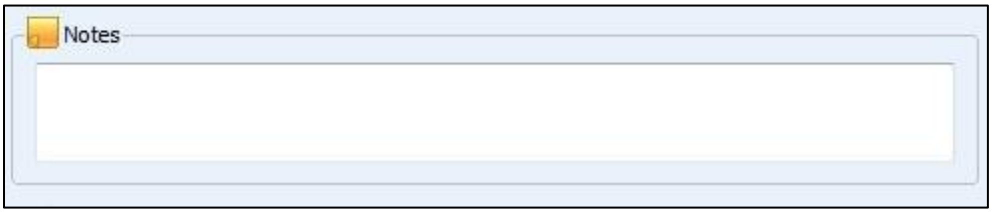
Enter the payment amount into the appropriate method of payment.

Tip: *Click on the Scales icon next to the desired method of payment to automatically generate the outstanding amount that has to be paid.*

After adding the amount next to the desired method of payment, the balances section of the payments screen will be updated.

Tip: *If you are taking a cash payment checking the "give change" option will show the change amount based on the total monies you are receiving, rather than entering the outstanding amount enter the total value of cash the patient has given and the total amount of change due will display.*

You also have the ability to add notes into the notes field, the first line of which appears on the patient account grid next to the payment.



Finally, you have the option to print a receipt for the payment (you will have to have a receipt template setup in the Documents section of your dental software).

Select a template from the dropdown list.

You have now entered all the necessary information, click **OK** to confirm.

In our example we now see the payment of £209 present in the list.

Date	Type		Age	Charge	Payment	Allocated	Balance	Description
02/01/2013	TI			48.00		48.00	0.00	NHS treatment (000283)
02/01/2013	TC				48.00	48.00	0.00	NHS treatment (000283)
04/01/2013	TI			209.00		209.00	0.00	NHS treatment (000283)
08/01/2013	PAY				209.00	209.00	0.00	Payment

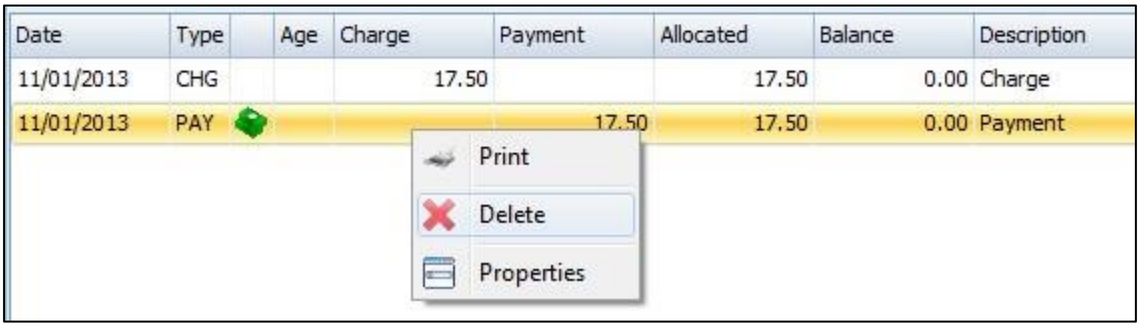
The patient balance at the top of the screen has also been updated.

Tip: *The background colour of the balance field above shows the current state of the patient account.* ***White*** *denotes a zero balance,* ***Green*** *denotes that the patient is currently in credit and* ***Red*** *denotes the patient is in debit.*

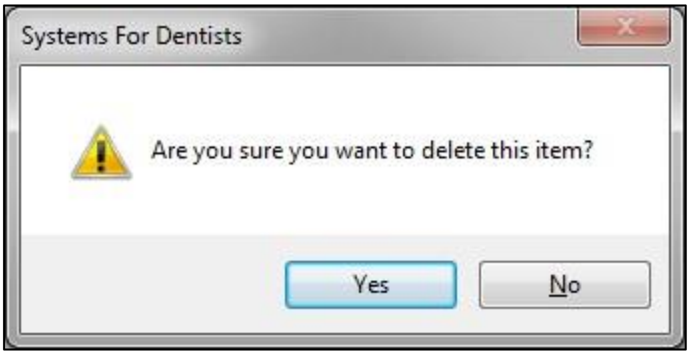
Deleting Payments

As with any accounts system, the dental software allows for the end user to correct errors, when you have made an error with a payment, be that the amount, method or even patient you are able to delete (depending on security permissions) the payments entered into SFD v6.

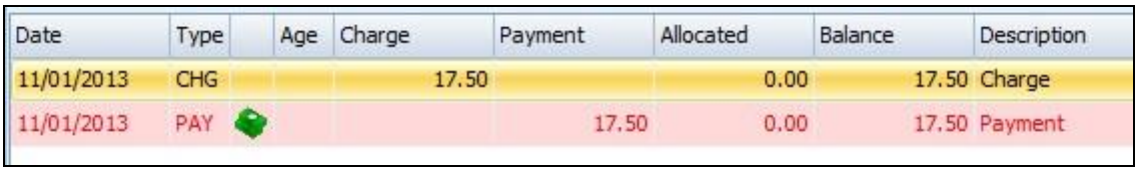
Select the payment you wish to delete by left clicking on the payment. Now you have selected the payment, right click then click **Delete**.



The window below appears, click **Yes** to confirm.



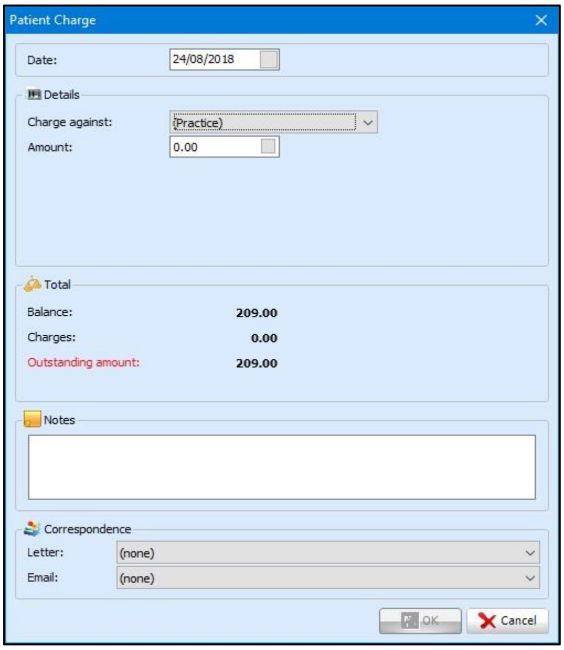
The payment is now deleted and will be highlighted red in the list of payments. All of the dental software reports have been updated to reverse the allocation of this payment, and its removal on the cash reports for the given date has also been completed.



Charges

Under certain circumstances you may wish to manually charge a patient, one example is a fee for failure to attend an appointment. To do this, click on the **Charge** button towards the top of the screen.

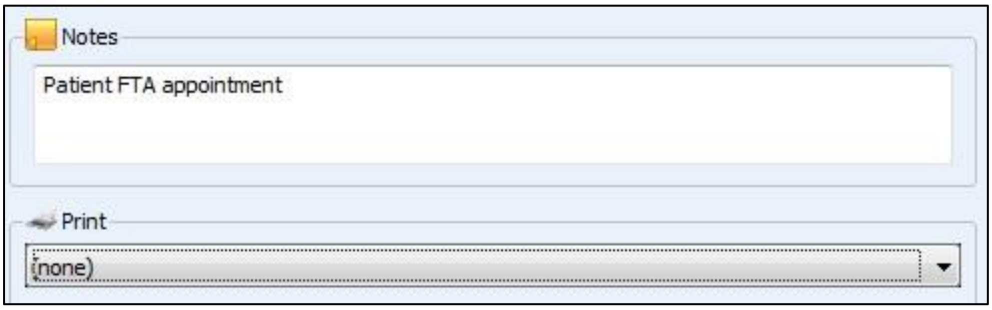
You will then be presented with the **Patient Charge** window.



Similar to the payments window you have the ability to choose a date in the past. The next option is to choose who the charge is to be put against (monies will be allocated to this user), select the performer from the dropdown or leave it on the default if you wish to charge against the practice.

Next, enter the amount of this patient charge.

You should also annotate the charge by adding notes into the note field.



You have the ability to print a receipt for the charge. Click **OK** to confirm the charge.

The charge (CHG) will now be present in the patient's lists of transactions.

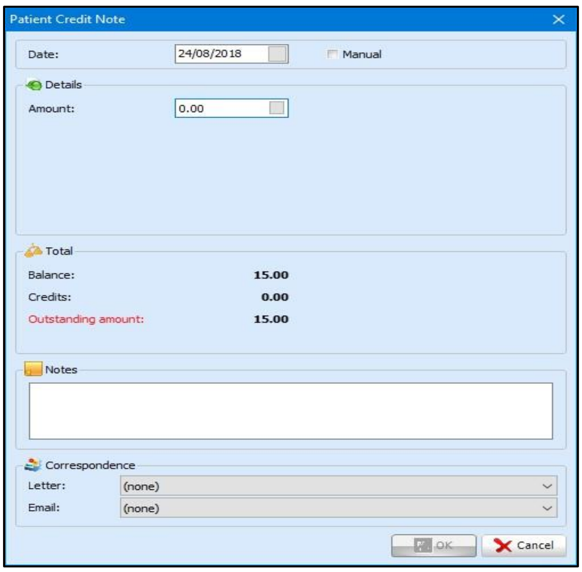
Date	Type	Age	Charge	Payment	Allocated	Balance	Description
02/01/2013	TI		48.00		48.00	0.00	NHS treatment (000283)
02/01/2013	TC			48.00	48.00	0.00	NHS treatment (000283)
04/01/2013	TI		209.00		209.00	0.00	NHS treatment (000283)
08/01/2013	PAY			209.00	209.00	0.00	Payment
08/01/2013	CHG		15.00		0.00	15.00	Patient FTA appointment

As with all our dental software account functions, the patient's balance at the top of the screen will automatically update.

Credit Notes

There may be times where you give patient credit notes. These are most commonly used for special offers you may have at your practice. To add a credit note to a patient's account, click on the **Credit Note** button towards the top of the screen.

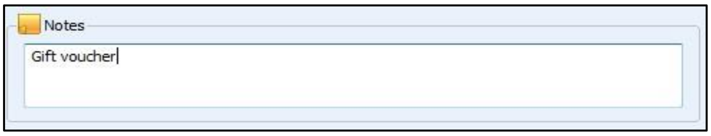
Once you have clicked the **Credit Note** button you will be presented with the **Patient Credit Note** window.



This window is very similar to the **Payment** and **Charge** screens. First, you are presented with the date (defaults to current day). The next section is **Details**. This is where you enter the amount the credit note is worth.

Similar to the **Payment** and **Charge** windows, when you enter the amount, it updates the Total section below.

Then you can enter any notes you feel necessary in the notes section below.



You also have the option to print a receipt. Once you have entered the necessary information, click the **OK** button in the bottom right-hand corner of the window.

The credit note will now display within the patient's list of transactions.

Date	Type		Age	Charge	Payment	Allocated	Balance	Description
02/01/2013	TI			48.00		48.00	0.00	NHS treatment (000283)
02/01/2013	TC				48.00	48.00	0.00	NHS treatment (000283)
04/01/2013	TI			209.00		209.00	0.00	NHS treatment (000283)
08/01/2013	PAY				209.00	209.00	0.00	Payment
08/01/2013	CHG			15.00		15.00	0.00	Patient FTA appointment
10/01/2013	CRD				30.00	15.00	15.00	Gift voucher

This is displayed as a CRD in the type column. The patient's balance at the top of the screen is also updated.

Refunds

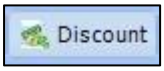
There may be times where a payment is entered into your system incorrectly and you may be required to refund a patient a certain amount of money. To do this, follow the steps below.

First of all, enter the patient's account screen, by clicking on the **Accounts** button.

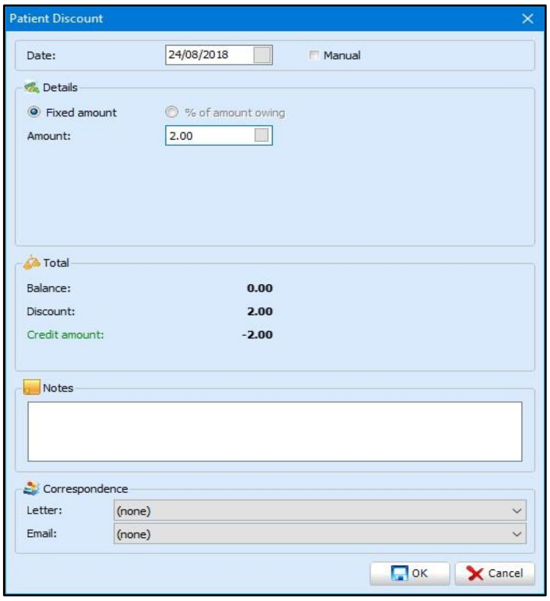
When you first enter the **Accounts** screen make sure the **Show all transactions** checkbox is ticked. Highlight the charge you have entered into the system incorrectly. To do this, click on the charge (example below).

Date	Type		Age	Charge	Payment	Allocated	Balance	Description
18/05/2010	PAY				16.50	16.50	0.00	Patient Receipt 4764
18/05/2010	CHG			16.50		16.50	0.00	Patient Invoice 4675
08/06/2010	CHG			29.10		29.10	0.00	Patient Invoice 4837
08/06/2010	PAY				29.10	29.10	0.00	Patient Receipt 4919
23/11/2010	CHG			16.50		16.50	0.00	Patient Invoice 6095
23/11/2010	PAY				16.50	16.50	0.00	Patient Receipt 6134
24/02/2011	CHG			16.50		16.50	0.00	Patient Invoice 6711
24/02/2011	PAY				16.50	16.50	0.00	Patient Receipt 6720
07/06/2011	CHG			17.00		17.00	0.00	Patient Invoice 7369
07/06/2011	PAY				17.00	17.00	0.00	Patient Receipt 7299

Now that the charge is highlighted, click on the **Discount** button towards the top of the screen.



The **Patient Discount** window appears. Notice you have the option to backdate the discount at the top of the window. Click the grey button in the corner of the date edit box and select the desired date from the calendar. In the example below the patient has been overcharged by £2 so I am going to discount this amount.

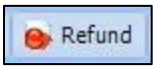


Once you have entered the values, click **OK**. You will now notice that the patient is in **credit** by £2 (providing the accounts were balanced before discount). The next step is to **balance** the account, to do this you need to **refund** the same amount you discounted.

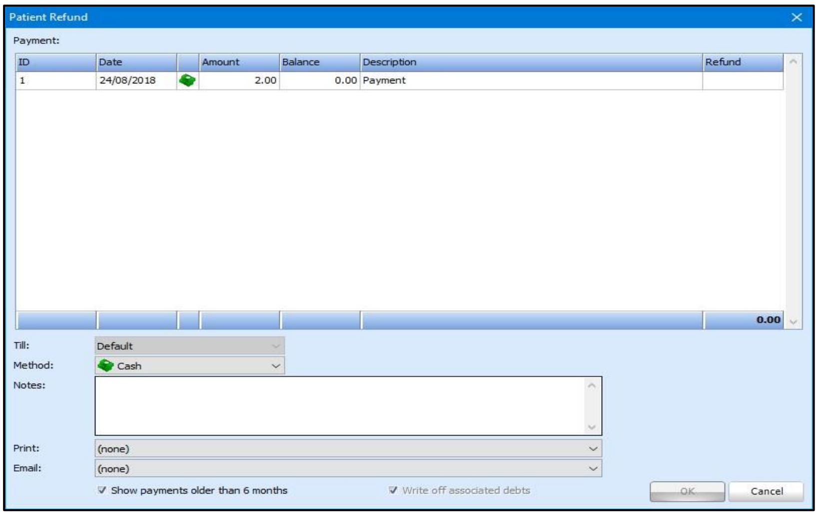
So for the next step, rather than clicking on the charge, you are going to click on the initial payment (example below).

Date	Type		Age	Charge	Payment	Allocated	Balance	Description
18/05/2010	PAY				16.50	16.50	0.00	Patient Receipt 4764
18/05/2010	CHG			16.50		16.50	0.00	Patient Invoice 4675
08/06/2010	CHG			29.10		29.10	0.00	Patient Invoice 4837
08/06/2010	PAY				29.10	29.10	0.00	Patient Receipt 4919
23/11/2010	CHG			16.50		16.50	0.00	Patient Invoice 6095
23/11/2010	PAY				16.50	16.50	0.00	Patient Receipt 6134
24/02/2011	CHG			16.50		16.50	0.00	Patient Invoice 6711
24/02/2011	PAY				16.50	16.50	0.00	Patient Receipt 6720
07/06/2011	CHG			17.00		17.00	0.00	Patient Invoice 7369
07/06/2011	PAY				17.00	17.00	0.00	Patient Receipt 7299

Now you have the payment selected, click the **Refund** button towards the top of the screen.



The **Patient Refund** window appears. Similar to the **Discount** window you have the ability to backdate. In the example below, the original payment was paid by cash so next to cash I am going to enter the £2 that needs to be refunded to the patient.



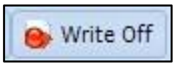
Double click the £2 value and enter the amount you wish to refund. Once you have entered the correct value, click the **OK** button.

The patient's account will now be balanced. The discount and refund will be displayed as shown below.

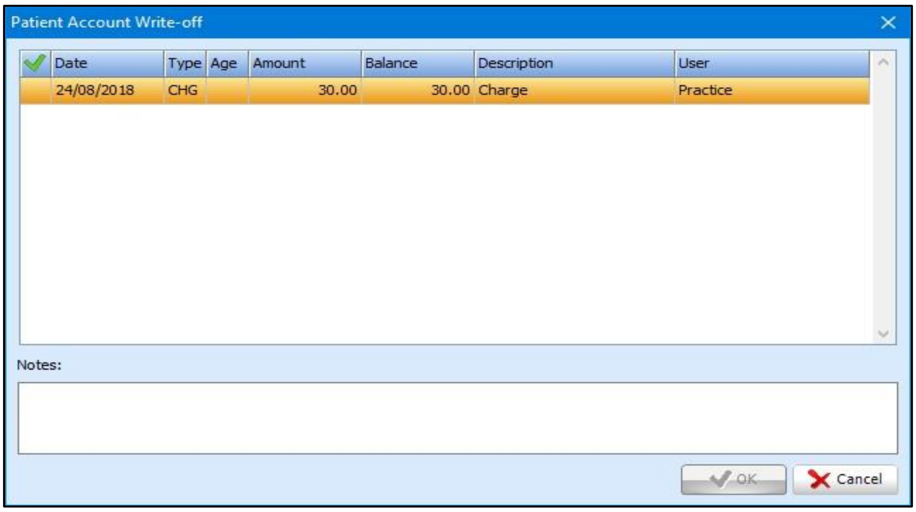
07/06/2012	DIS				2.00	2.00	0.00	
07/06/2012	REF			2.00		2.00	0.00	

Write offs

On occasions you may decide to write off a patient debt in your dental software, though this is not a common occurrence. To perform a write off within SFD v6, click on the **Write Off** button within the **Patient Account** screen.



You will then be presented with the following window.



To select the charge/invoice you wish to write off, left click on it from the list, and then click in the column under the tick. A tick will then appear next to the charge.

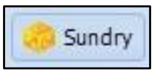
You can then write any notes you feel necessary in the notes field. To confirm the write off, click the **OK** button in the bottom right-hand corner of the window.

The write off will show in the list of transactions as shown below.

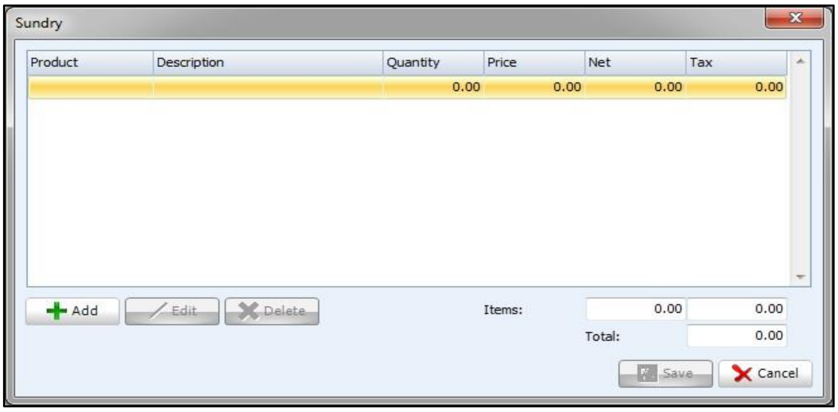
Date	Type		Age	Charge	Payment	Allocated	Balance	Description
11/01/2013	CHG			30.00		30.00	0.00	Charge
11/01/2013	W/O				30.00	30.00	0.00	

Sundry sales

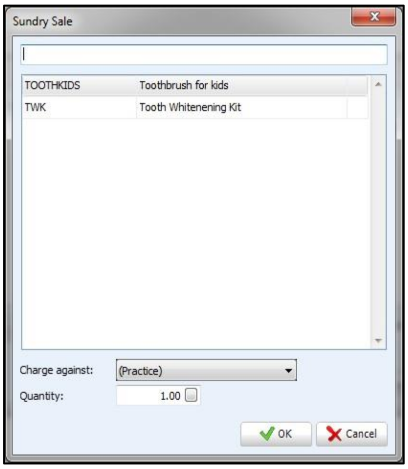
As a practice you may sell **Sundry** items. SFD v6 makes it very simple to add sundry sales to the **Patient Account**. To add a sundry item charge to a patient's account, click on the **Sundry** button at the top of the screen.



The window shown below appears after clicking on the **Sundry** button.

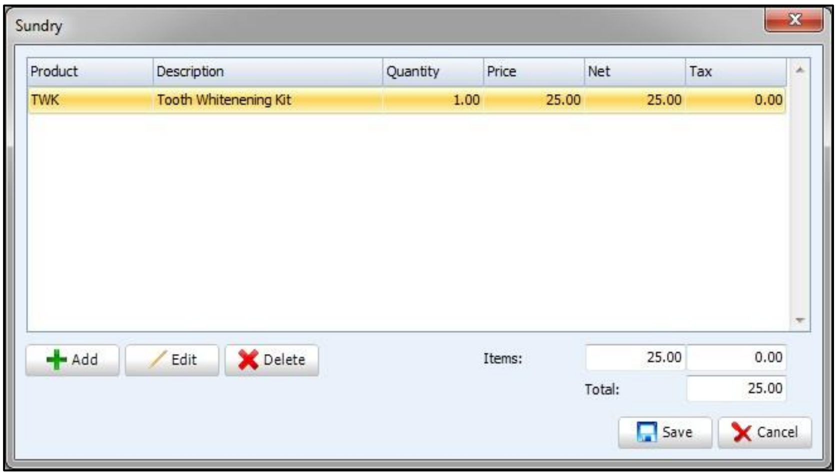


To add a sundry item, click on the **Add** button in the bottom left of the window. You will be presented with the following window.



Select the sundry item you require from the list by clicking on it. You can also choose the performer you wish to charge the sundry item against (choose from the **Charge against** dropdown). Finally, you have the option to enter the quantity of the item you wish to add. Click the **OK** button to confirm.

Once you have selected your sundry item(s) it will now show in the initial sundry item screen.



The screen will now be updated with any prices/taxes etc. To remove anything made in error, click on the item you wish to delete then click the **Delete** button. Once you have added all sundry items required, click **Save**.

The sundry sale will now be shown in the list of transactions (example below).

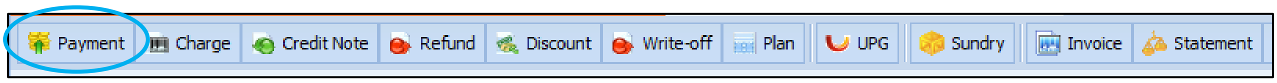
Date	Type	Age	Charge	Payment	Allocated	Balance	Description
11/01/2013	CHG		30.00		30.00	0.00	Charge
11/01/2013	W/O			30.00	30.00	0.00	
11/01/2013	SI		25.00		0.00	25.00	Tooth Whitenening Kit

How to add a sundry item

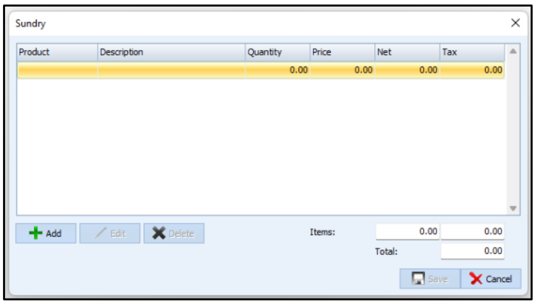
Payments for **sundry** items can be added within the patient account in SFD.

To take a **payment** from a patient select the **Scales** icon from the patient main menu.

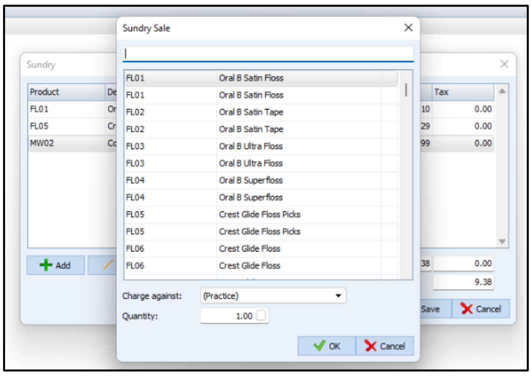
Select the **Sundry** button from the payment menu bar.



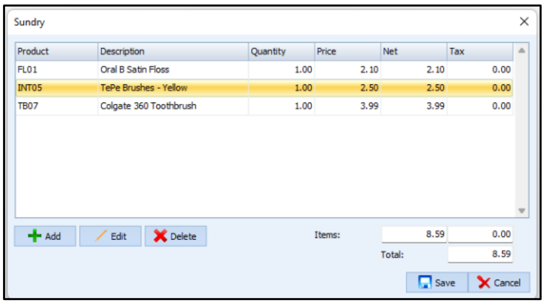
When the sundry window opens click **add**, to select the sundry items the patient wishes to purchase.



Select the **item** to be purchased and click **Ok**. Repeat for each item to be purchased.



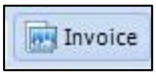
Once the items have been selected, click **save** and the balance will be updated.



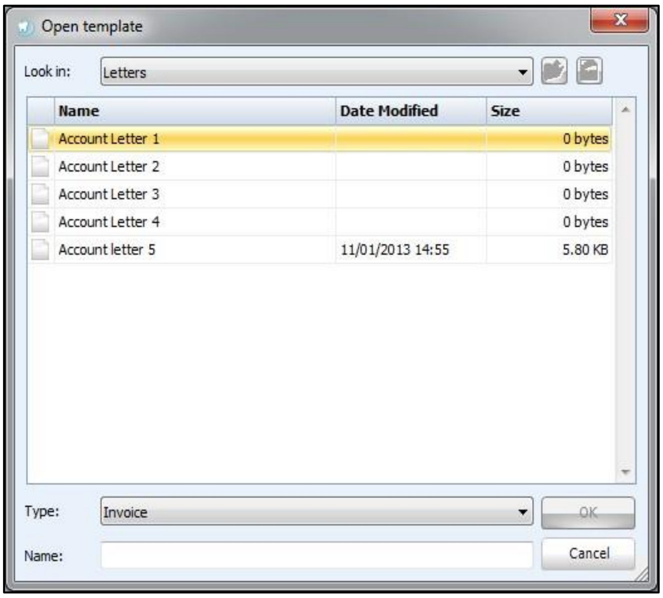
Payments can then be processed as previously shown in how to record a payment section.

Invoice

From the **Patient Account** screen in SFD v6 you have the ability to create invoices for patients. To create an invoice, click on the **Invoice** button towards the top of the screen.



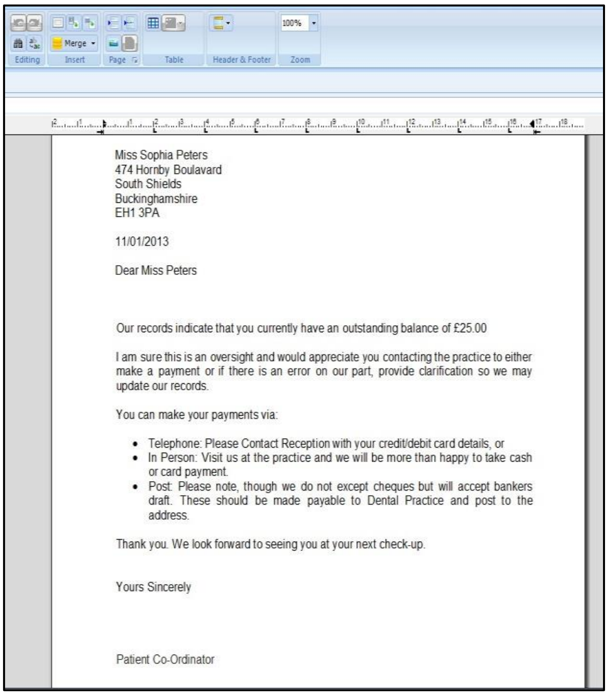
After clicking **Invoice** you will be presented with a choice of your invoice templates (example below).



Click on the desired template, and then click the **OK** button to create your template.

Your invoice will be created and personalised to the patient, with the use of our merge field feature (see setup section of the manual to discover how to use this fantastic feature).

Here is an example of what your invoice letter may look like.



Miss Sophia Peters
474 Hornby Boulavard
South Shields
Buckinghamshire
EH1 3PA

11/01/2013

Dear Miss Peters

Our records indicate that you currently have an outstanding balance of £25.00

I am sure this is an oversight and would appreciate you contacting the practice to either make a payment or if there is an error on our part, provide clarification so we may update our records.

You can make your payments via:

- Telephone: Please Contact Reception with your credit/debit card details, or
- In Person: Visit us at the practice and we will be more than happy to take cash or card payment.
- Post: Please note, though we do not except cheques but will accept bankers draft. These should be made payable to Dental Practice and post to the address.

Thank you. We look forward to seeing you at your next check-up.

Yours Sincerely

Patient Co-Ordinator

Now your invoice is created you have the option to **Save**, **Print**, **Print a Draft** or **Email** this document, these buttons are found towards the top left of the screen.

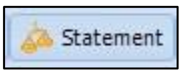
By clicking the **Save** or **Email** buttons, this saves a copy of the invoice to the **Patient Correspondence** section of the patient record.

Statements

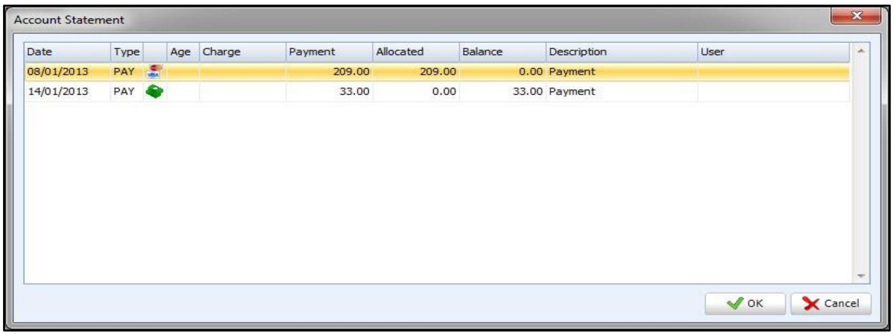
It is useful to provide your patients a breakdown of their treatment and costs associated with each treatment item. SFD v6 makes it very easy to do that.

The patients account section has two distinct statement options for reasons of clarity.

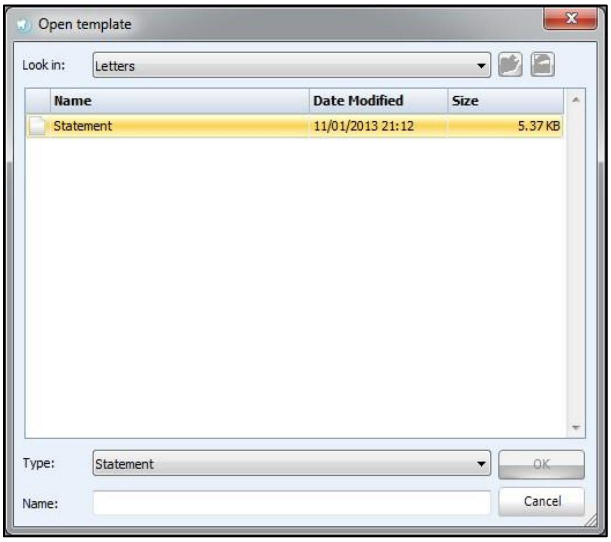
The 1st statement option with the "scales" icon is the traditional statement.



This allows you to print a full statement of account. Once you click this button a grid will be shown, offering you the ability to select the starting point of the statement.

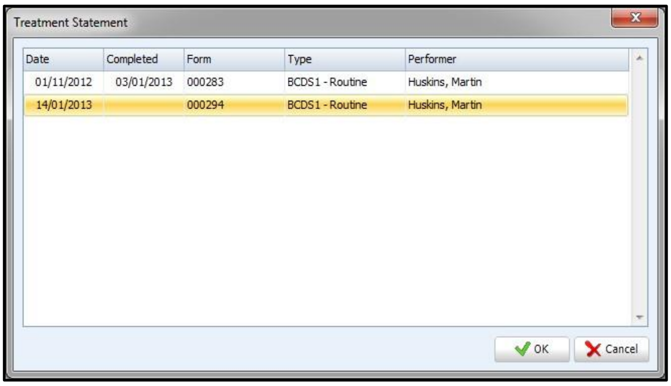


Once you have selected the starting point and clicked **OK** you will be offered a choice of template.



The 2nd statement option has the "Dental Chair" icon.

This is a treatment form statement. When you click this button it will ask you to select which treatment form you would like to print the statement from.

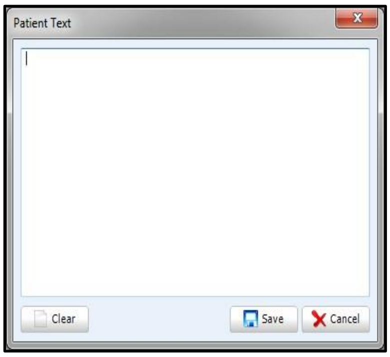


This statement will only include items from the selected treatment form. As such this option is useful for patients needing to make insurance claims for their dental treatment.

Memo

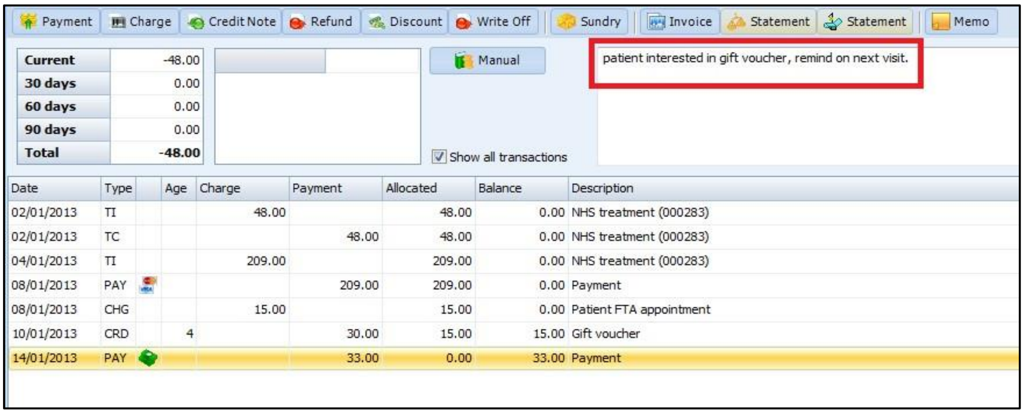
The final button within the patient's account screen is the **Memo** button.

Once you click the **Memo** button you will be presented with the following window.



In this window you can record any notes that may be relevant to the particular patient. Once you have typed in the notes, click the **Save** button in the bottom right hand corner.

The memo you have typed will be displayed as shown below.

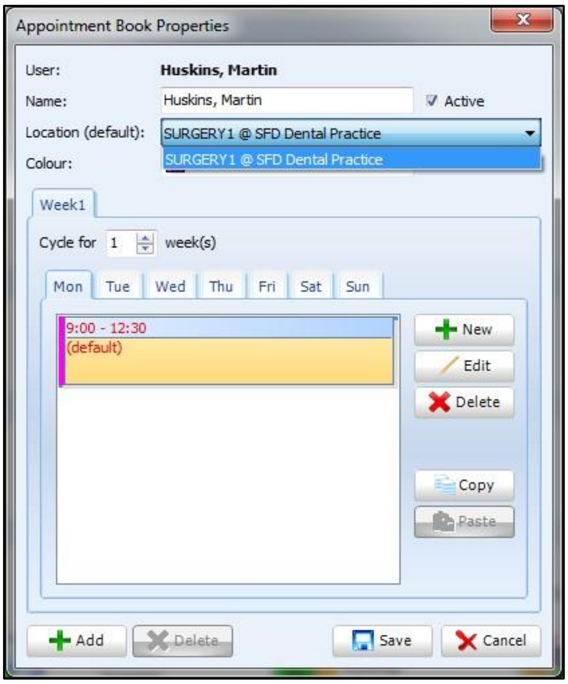


To clear the memo, click on the **Memo** button then click the **Clear** button in the bottom left-hand corner.

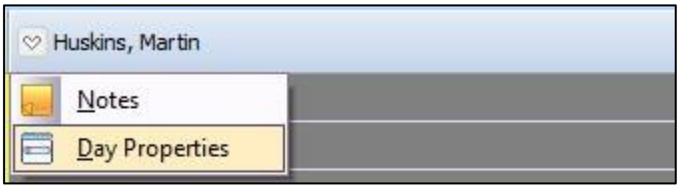
How do I use the waiting room? (Gingerbread men/Calendar)

Gingerbread men are used as markers for patients who are waiting to be seen. It is important to note that the Gingerbread men work by **Location and not by the User.**

Location is initially set in **Program** within **Setup**, under the **General** tab there is a dropdown list named Location. Select the desired location from here. The appointment book also has a default location set. This is also found within **Setup**, under **Appointments** select **Books** and select the desired dentist from the list by double clicking on them. You can now select the location from the drop-down list.



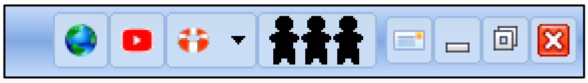
However, for whatever reason there is no location set you can take the following approach. To set the location, click on the down arrow next to the dentist's name on the appointment clipboard. A drop-down menu appears. Select **Day Properties**.



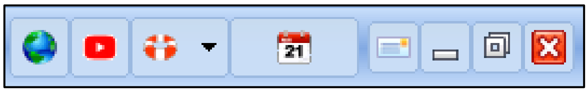
The Appointment Book Properties window will open. Select the desired time slot by double clicking on it. A Session Properties window appears. Select the location from the Location drop down menu.

Now that your location is correctly set, your Gingerbread men feature will now be up and running. When a patient arrives at the practice, select the patient's appointment then right click. A menu appears, select **Attended**. Once you have selected attended a Gingerbread man appears in the top right-hand corner of your screen. The Gingerbread men can take up to 15 seconds to update.

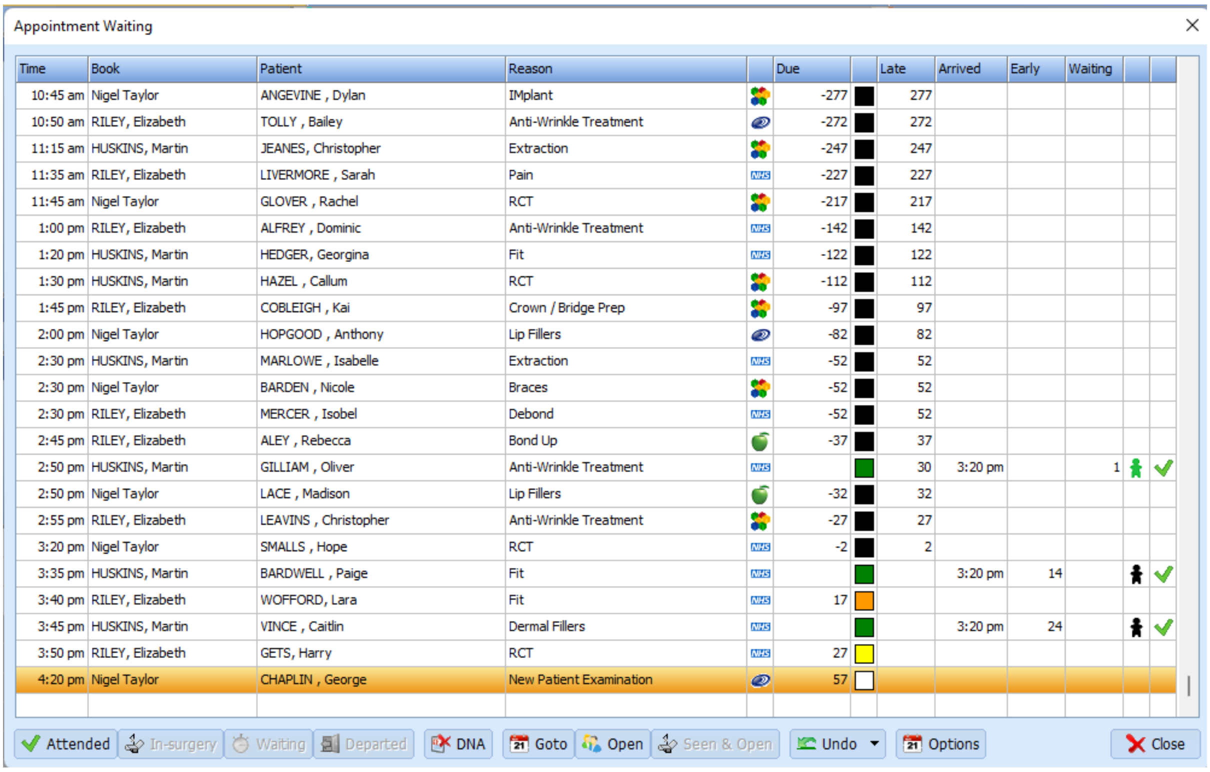
When a patient has been marked as attended the clinician will see ginger bread men in the button on the toolbar at the top right. This will indicate that patients are waiting.



In reception your waiting room button will look like a calendar not gingerbread man.



When you click on the waiting room button, the appointment waiting window will appear. On reception you will see all clinicians' appointments. The window will show, appointment time, who the appointment is booked with, Reason for appointment, scheme, time patient arrived, if they were late or early and finally how long they have been waiting.



Appointment Waiting

Time	Book	Patient	Reason		Due		Late	Arrived	Early	Waiting		
10:45 am	Nigel Taylor	ANGEVINE , Dylan	IMplant		-277		277					
10:50 am	RILEY, Elizabeth	TOLLY , Bailey	Anti-Wrinkle Treatment		-272		272					
11:15 am	HUSKINS, Martin	JEANES, Christopher	Extraction		-247		247					
11:35 am	RILEY, Elizabeth	LIVERMORE , Sarah	Pain	NHS	-227		227					
11:45 am	Nigel Taylor	GLOVER , Rachel	RCT		-217		217					
1:00 pm	RILEY, Elizabeth	ALFREY , Dominic	Anti-Wrinkle Treatment	NHS	-142		142					
1:20 pm	HUSKINS, Martin	HEDGER, Georgina	Fit	NHS	-122		122					
1:30 pm	HUSKINS, Martin	HAZEL , Callum	RCT		-112		112					
1:45 pm	RILEY, Elizabeth	COBLEIGH , Kai	Crown / Bridge Prep		-97		97					
2:00 pm	Nigel Taylor	HOPGOOD , Anthony	Lip Fillers		-82		82					
2:30 pm	HUSKINS, Martin	MARLOWE , Isabelle	Extraction	NHS	-52		52					
2:30 pm	Nigel Taylor	BARDEN , Nicole	Braces		-52		52					
2:30 pm	RILEY, Elizabeth	MERCER , Isobel	Debond	NHS	-52		52					
2:45 pm	RILEY, Elizabeth	ALEY , Rebecca	Bond Up		-37		37					
2:50 pm	HUSKINS, Martin	GILLIAM , Oliver	Anti-Wrinkle Treatment	NHS			30	3:20 pm		1		
2:50 pm	Nigel Taylor	LACE , Madison	Lip Fillers		-32		32					
2:55 pm	RILEY, Elizabeth	LEAVINS , Christopher	Anti-Wrinkle Treatment		-27		27					
3:20 pm	Nigel Taylor	SMALLS , Hope	RCT	NHS	-2		2					
3:35 pm	HUSKINS, Martin	BARDWELL , Paige	Fit	NHS				3:20 pm	14			
3:40 pm	RILEY, Elizabeth	WOFFORD, Lara	Fit	NHS	17							
3:45 pm	HUSKINS, Martin	VINCE , Caitlin	Dermal Fillers	NHS				3:20 pm	24			
3:50 pm	RILEY, Elizabeth	GETS, Harry	RCT	NHS	27							
4:20 pm	Nigel Taylor	CHAPLIN , George	New Patient Examination		57							

Attended | In-surgery | Waiting | Departed | DNA | Goto | Open | Seen & Open | Undo | Options | Close

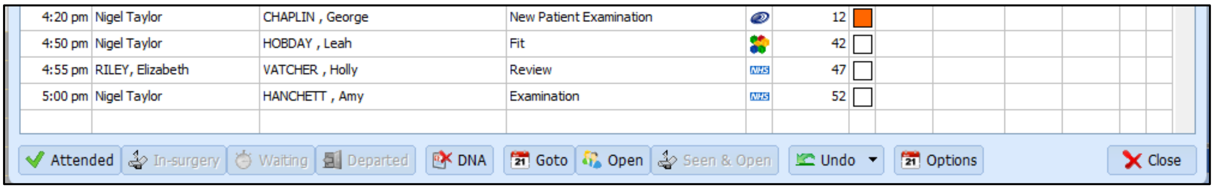
The Gingerbread man appears green when the patient's appointment is scheduled to start. The Gingerbread man appears black up until the time of the scheduled appointment. After 5 minutes green Gingerbread men will turn orange, after 10 minutes the orange will turn to red. This acts like a traffic light system which can assist you with prioritising patients.

The Gingerbread men will disappear when the patient is marked as In Surgery **,as the treatment chair icon will appear**.

Gingerbread men will remain visible if the patient has been marked as **Attended** and then marked as **Departed** without being marked as **In Surgery**. A circumstance where this may occur could be when a patient's appointment may have been pushed back but they cannot wait any longer to be seen. An icon with a red cross in front of a door appears in this case.

Appointments can be controlled and monitoring through the waiting room window, using the buttons at the bottom. Patients can be marked as attended, In surgery, Departed or DNA.

If you select the **seen and open** button it will mark the patient as In surgery and open the patient record.

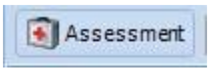


Notes: Appointment cancellations can only be completed in the appointment book area.

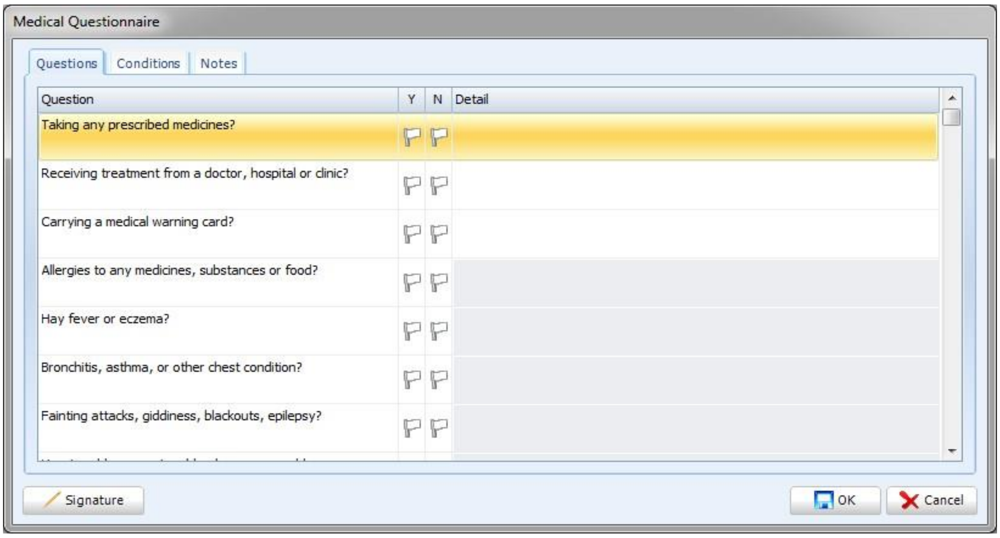
How do I complete a patient Medical?

Patient Medical histories are a vital part of any dental software. SFD makes storing and creating medical histories very simple. To enter a medical questionnaire to a patient's record, click on the **medical** button. This can be located on the patient toolbar on the patient home screen.

Enter results (answers) for the medical questionnaire by clicking on the **Assessment** button in the top left-hand corner.



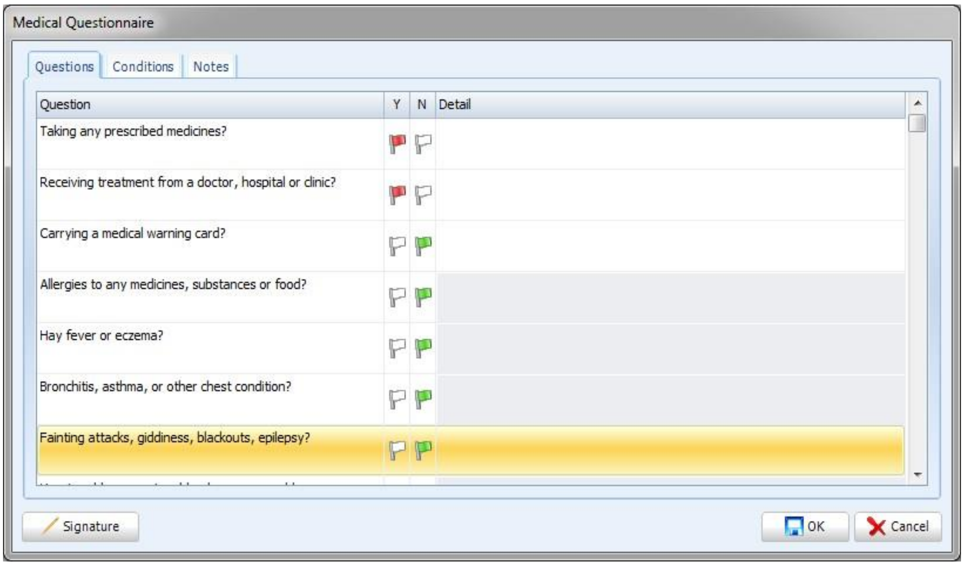
Once you have clicked the **Assessment** button you will be presented with your medical questions, as previously setup within the dental software setup section. SFD has a default medical questionnaire supplied, which should be checked and approved by the practice prior to using the system.



You will notice there is also a tab for conditions and notes. Refer to the **Medical Setup** section of the manual to see how to add, edit and delete questions and conditions from the medical questionnaire.

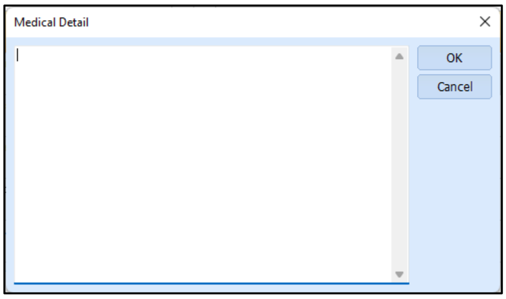
Note: *The medical questionnaire is another place where you can use SFD fantastic signature feature to record patient signatures so there is no need to store paper records. Contact our Sales team either by phone on **0191 5006789** or email sales@sfd.co for more information.*

To answer the questions on the questionnaire, click on the flag under either Y or N. Once selected the colour of the flag will change (example below).



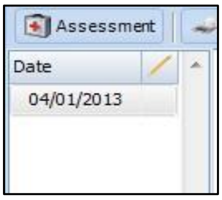
Once you have entered all necessary information, click the **OK** button in the bottom right-hand corner of the window.

If you select yes to any of the questions a notes window will appear to enter your text response to the question.



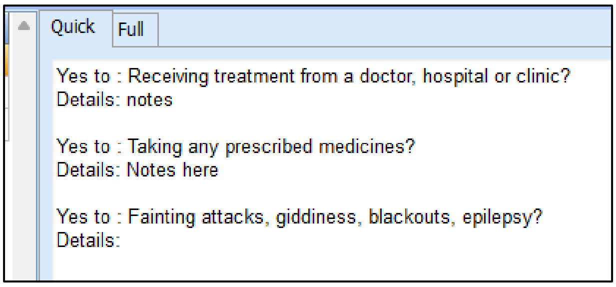
Click **Ok** to save the notes.

You can see any historical medical forms in the left-hand column of the screen (example below).



When you select one of the historical medical assessments in the left-hand column, the system will show the questions the patient answered yes to on the main section of the screen. To ensure clarity at a glance the dental software does not show answers which require no user action or intervention.

The **quick tab** will show only questions the user has responded yes to. The **full tab** will show the full questionnaire.



If a patient has answered **yes** to a question on the medical questionnaire a **medical alert flag** will appear in the alert window on the patient toolbar. The alert will flash red, click on the alert once to stop it flashing.

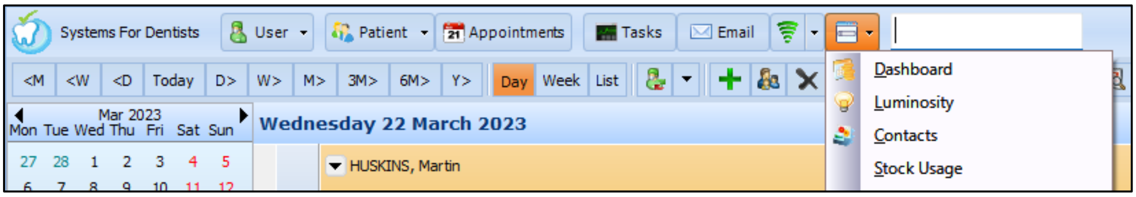
You also have the ability to print medical assessments by clicking the **Print** button towards the top of the screen.

End of day reports

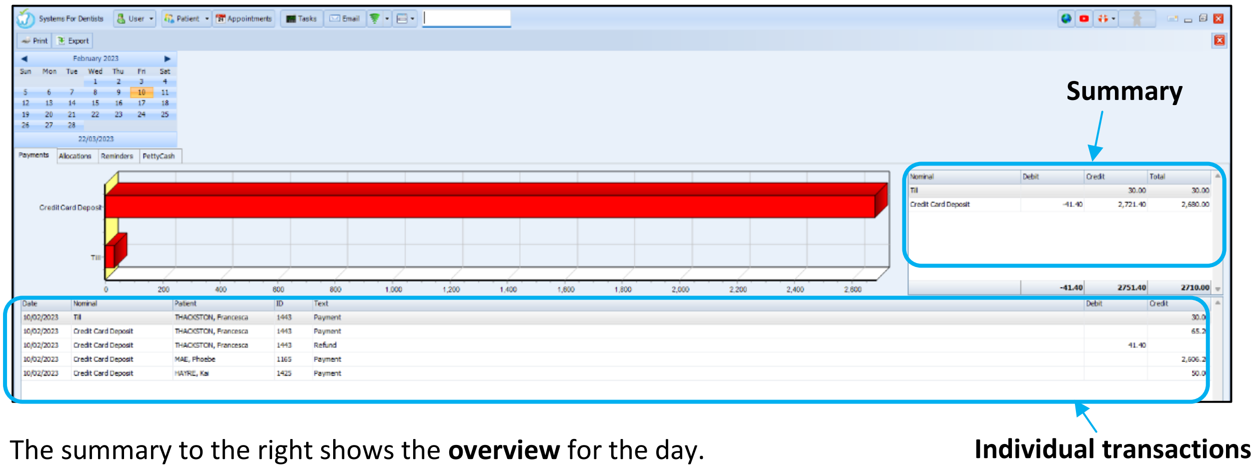
How to cash up using the dashboard

In SFD you can cash up daily to show a financial summary for the day. This report will also give a breakdown of individual transactions for the day.

To access this report in SFD click on **further options**, select **Dashboard** from drop down.

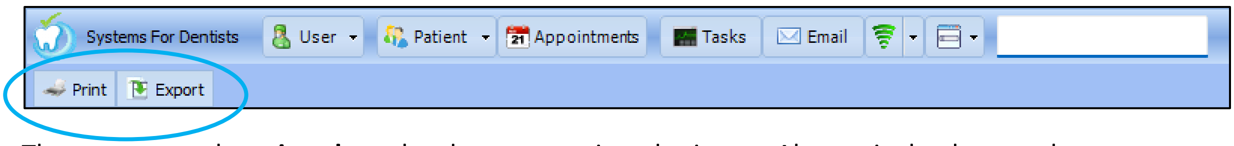


The dashboard screen will appear. The top right box shows **summary** for the day and the bottom box shows each **individual transaction**.



The summary to the right shows the **overview** for the day.

The table at the bottom shows the **transactions individually**.



The reports can be **printed** as a hard copy to assigned printers. Alternatively, they can be printed/Saved as a PDF document. Select option from the drop-down list. Reports can also be exported to an **Excel** document.