Systems for Dentists

Setup Options Guide in SFD

Contents

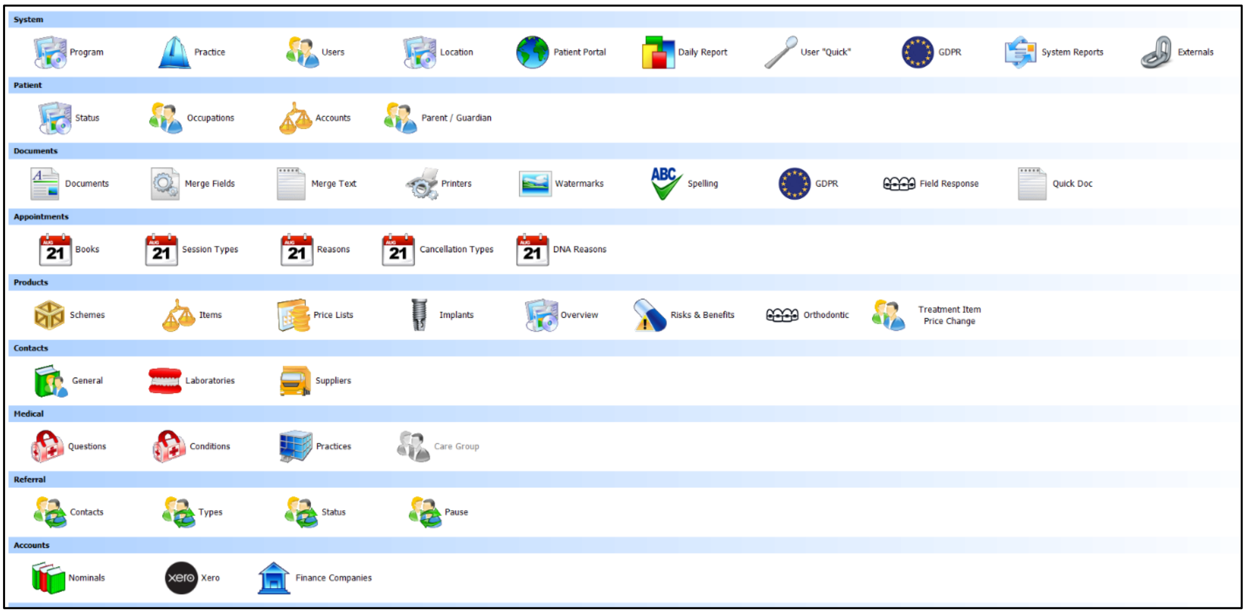
Introduction

In SFD many of the features can be customised to suit the practice needs as the program allows you to customise virtually every aspect of your system.

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 categories based on the area of the system you would like to change.



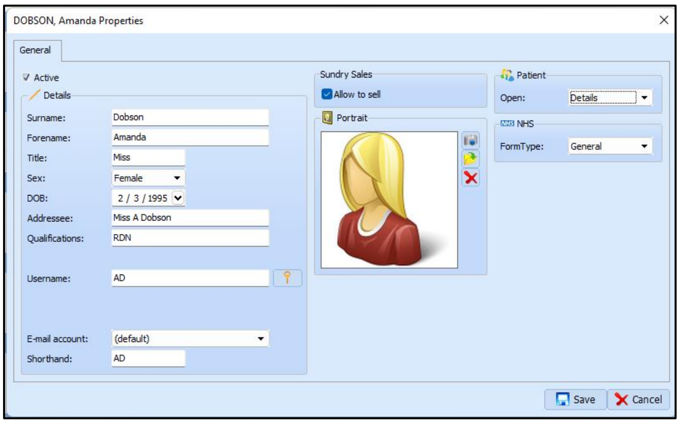
Below is a breakdown of each category and the main setup options which a practice will benefit from customising.

System Category

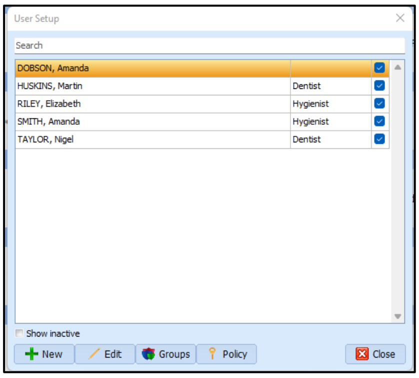
How to add a new User to SFD?

Click Users from the SfD setting menu.

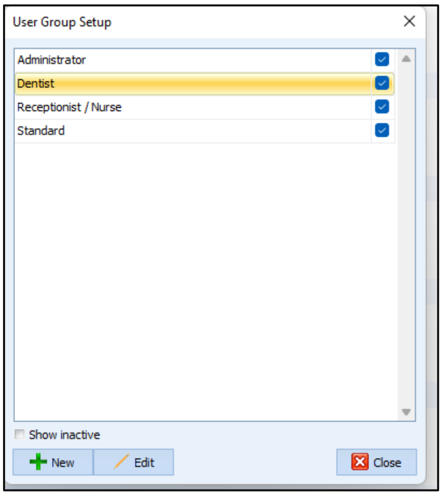
Click add to add a new user and fill in the required details.



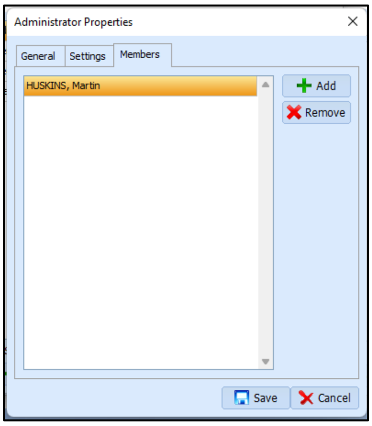
The user will need to be added to specific permissions groups. These groups will dictate what features a user can complete such as the ability to edit and delete information. To add a user to a specific permissions group, select the **Groups** button.



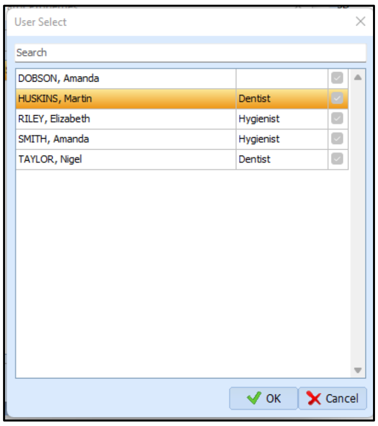
Choose the group you wish to add a user to and click **edit**.



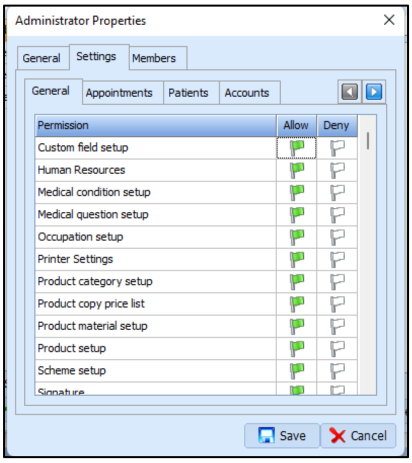
Select the **members** tab and add the user to the group by clicking add.



Add your user and click ok.

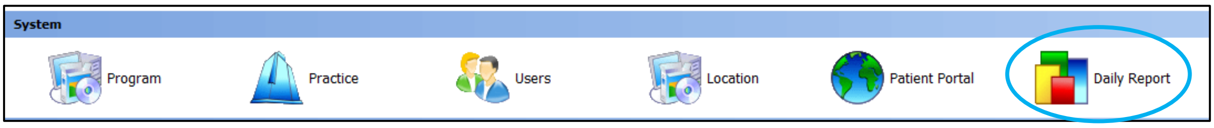


To adjust the permissions setting for each user select the **settings** tab. Check the allow or deny flag for each permission setting.

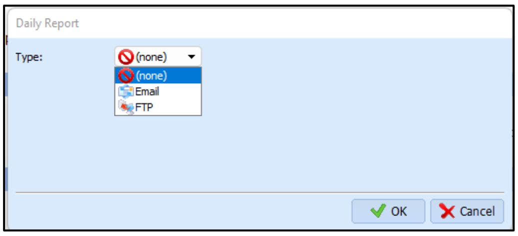


How can I create a daily report?

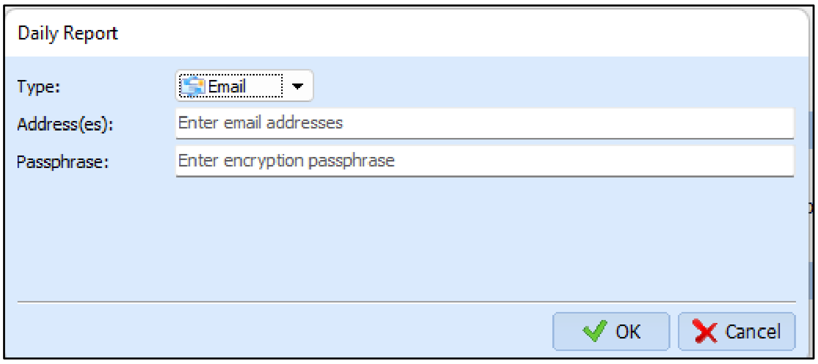
In SFD within the setup you can action a daily report. The report will show daily profits and occupancy.



Select the type of report you which to receive. You can receive a report via email or FTP (File transfer protocol. The most common method is email as this is directly received. Click Ok.

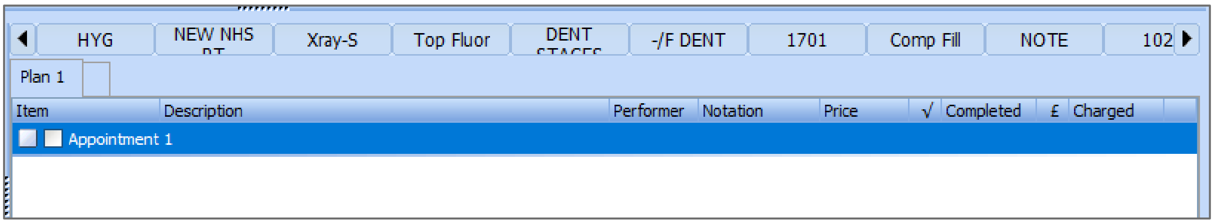


Enter the **email address** you want the report to be sent to. You also need to enter a **passphrase** to be able to open the report.

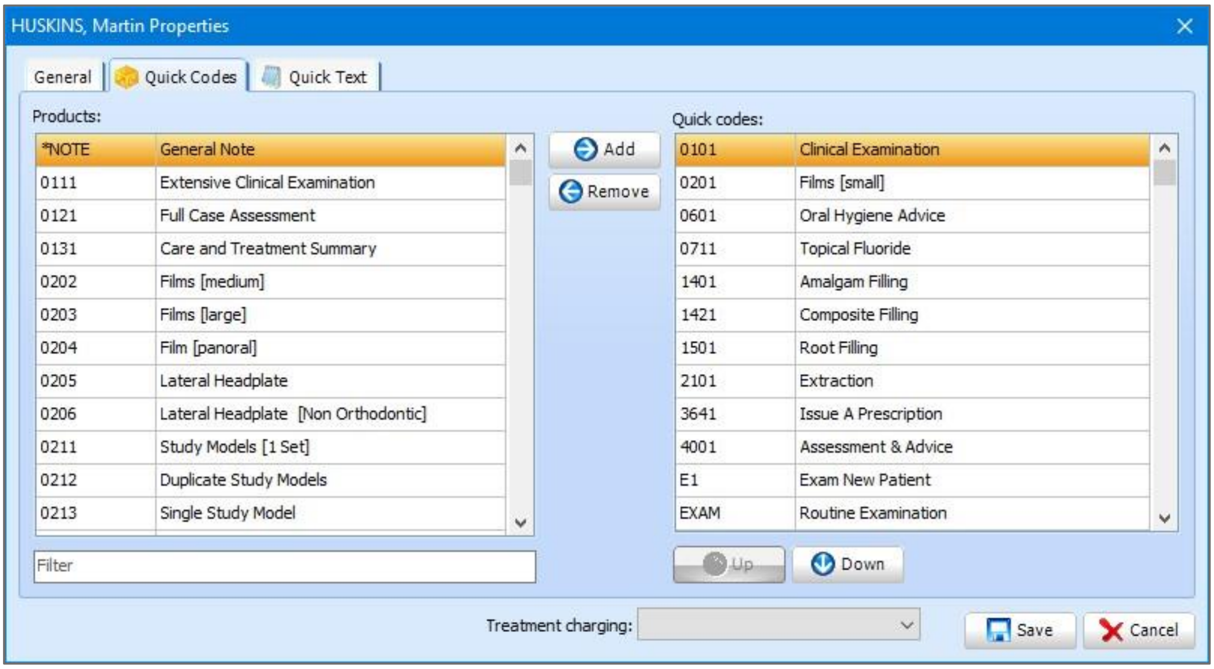


How do I add user quick items above the treatment plan?

In SFD you can add commonly used treatment items to a quick selection toolbar/menu above the treatment plan. Treatment quick codes allow you to enter your more commonly used items of treatment at the click of a button rather than searching for them.



Each dentist / hygienist may choose which codes and in what order they are displayed. Open the **User properties** of the user you would like to add a code(s) for, and select the **Quick Codes** tab.

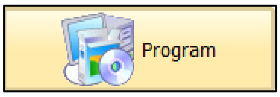


The List on the left-hand side shows all the available codes you can add to the user. The right-hand screen shows all the quick codes the users currently have. To add a quick code, find the code on the left then click on the **Add** button. This will then move that code to the right-hand side. You can also change the order in which they appear on the bar within a treatment form. To do this select the code you wish to move and click on either the **Up** or **Down** arrow buttons. Once you have added the codes you want, and are happy with the order, click **Save**. The next time the user opens up a Treatment form, the quick code bar should be updated.

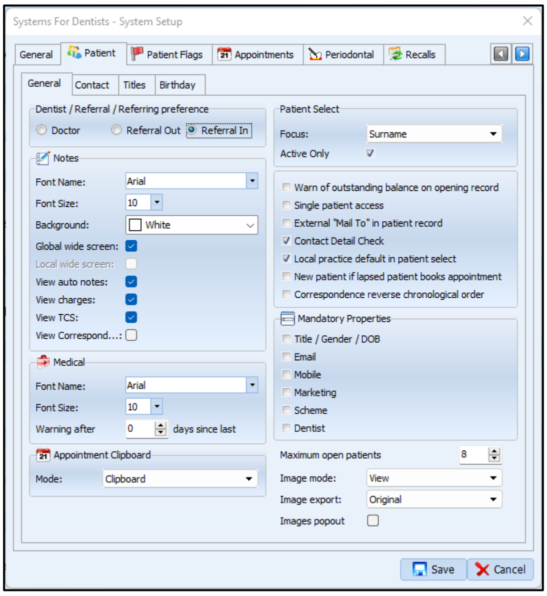
How can I make fields on a patient record mandatory?

In SFD it is possible to make certain fields on the patient record mandatory meaning that when adding a patient to the system we are ensuing that the necessary details are being recorded.

You can change this setting in the **Program** section of the setup page.



Once in **Program** navigate to the **Patient** tab at the top of the screen.



You will find the Mandatory Properties available in the bottom right of this page and it will include the below options:

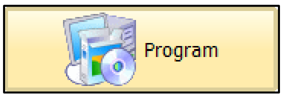
- Title / Gender / DOB
- Email
- Mobile
- Marketing
- Scheme
- Dentist

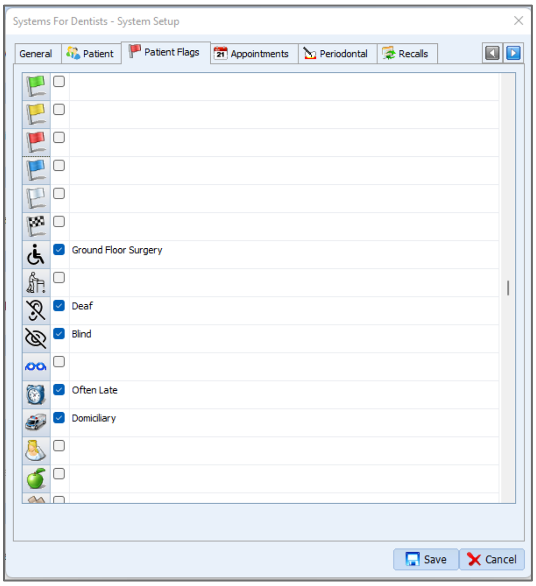
To make any of these Mandatory simply tick the relevant option on the list and select **save**.

Now when a user creates a new patient or edits an existing one it will prompt the user if those details haven't been added to the record. This should therefore ensure that patients records are getting the minimum level of detail the practice requires.

How to add Patients Flags to use on a patient record?

Patient Flags are unique identifiers that can be put on a patient record for the purpose of alerts. To add patient flags to your system select the Program option within the SFD Setup screen.





Then select the **patient flag** tab on the menu. This will provide a list of images available in the system to use.

Identify the image that is best suited to your alert from the list of provided images and then tick it to enable it.

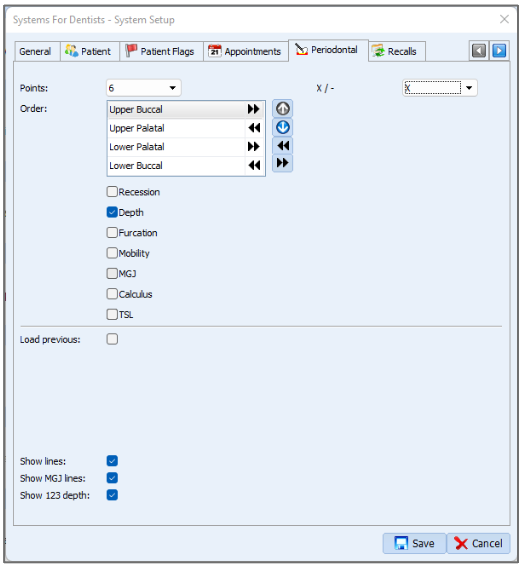
Provide further detail for what purpose this flag will be used for such as “Ground Floor Surgery” and then click **save**.

This patient flag will now be able to use on the patients record.

How to set defaults for Periodontal recording?

Another option within the program setup which a practice will want to setup is the default options for a Periodontal Examination. Within SFD this can be set for the practice so each time a periodontal exam is recorded for a patient the user does not need to adjust the settings each time.

To make these changes navigate too the “**Periodontal**” tab in Program.



There are a few different options that can be selected as defaults within this section.

The practice can set the default for how many points the examination will cover such as 2,4 or 6.

The order and direction of the perio recording can also be setup and also what the standard options being recorded are.

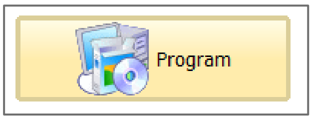
There are also options for how the perio displays on the chart with the “show lines”, “show MGJ lines” and “show 123 depth” options.

Once the user has made the changes required simply click **Save**.

How to add alerts if a medical hasn't been done for a patient recently?

Within SFD you can set an alert to appear when opening a patient if a medical hasn't been completed in a certain number of days. Practices will set this up to ensure medicals are recorded every 6 months etc.

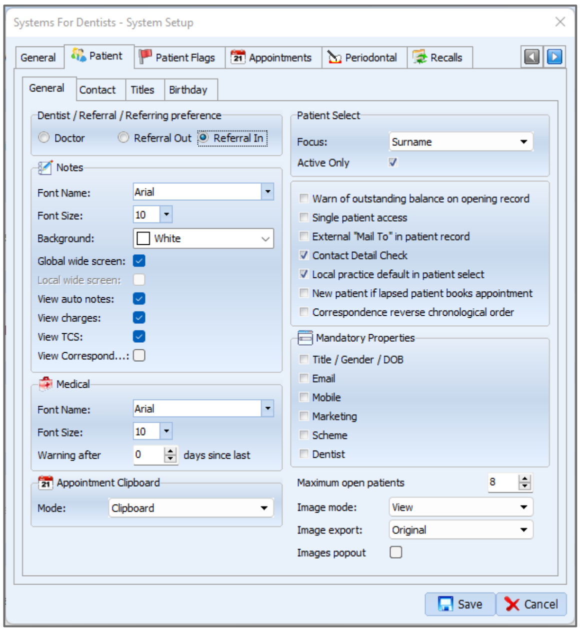
You can change this setting in the **Program** section of the setup page.



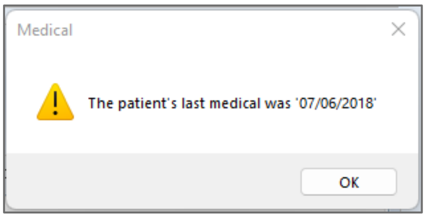
Once in Program navigate to the **Patient** tab at the top of the screen.

Within the patient tab there is a section for Medical which includes Font and Font size options.

Below those there is an option for "Warning after 0 days since last"



Simply apply the number of days and the system will then automatically prompt the user when opening a patient if there medical was recorded longer than the desired number of days ago as shown below:

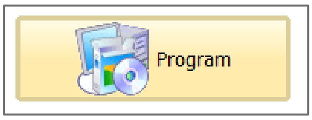


How to I add or change the patients Title options?

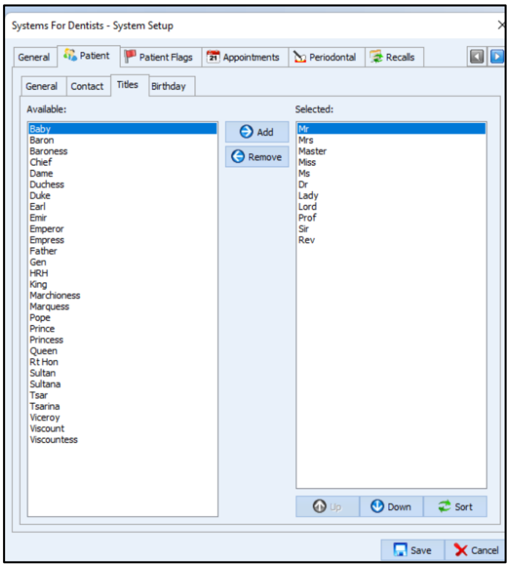
In a patients record properties windows titles are available which can be selected from a drop down. This list can be customised in the setting

Note: Many practices do ask if Patient title can be changed due to changing gender identification such as adding Mx. Whilst this is not available in the customisable list you can manual type Mx in the title within the patient properties window.

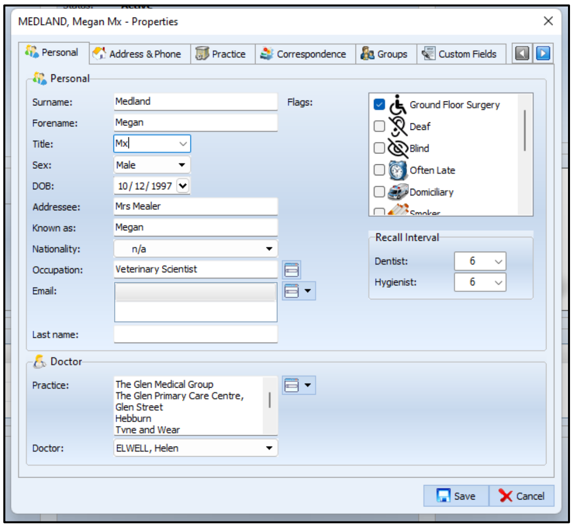
In the **setup** menu click **Program**



In the Patient tab select the titles tab. Using the add and remove buttons choice the title you wish to appear in the selected column.



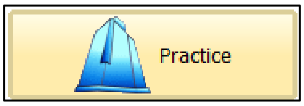
Note: However, if a patient identify as a different gender, the sex must be stated as male or female for medical purposes but their title can be recorded as Mx in the Patient record. Enter Mx Manually in the titles box in the patients record.



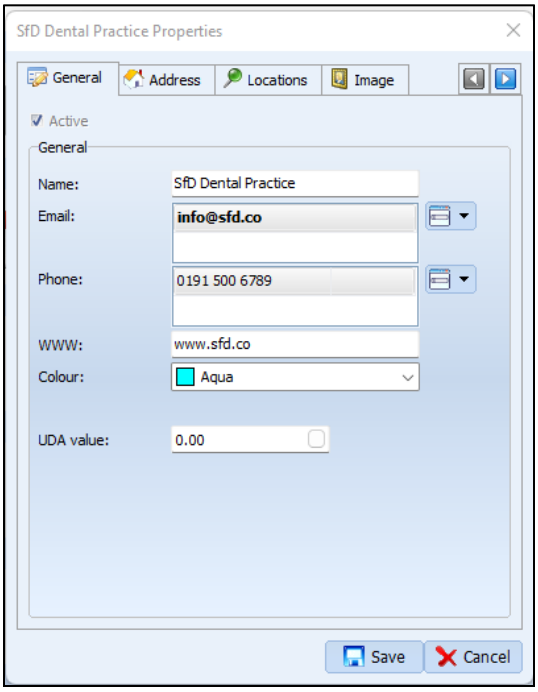
How to adjust the practice details in SFD?

In the setup page of SFD the practice details such as practice name, address and contact details are all saved and this information is commonly automatically added to patient documents. The information therefore needs to be kept up to date to ensure the correct details are being provided to patients.

To change these details the user needs to access the setup page and select **Practice**.



Once selected this will present the user with the option to select the practice and click edit to make any changes. Once the user had selected to edit the practice, they will then see the practice properties page on screen.



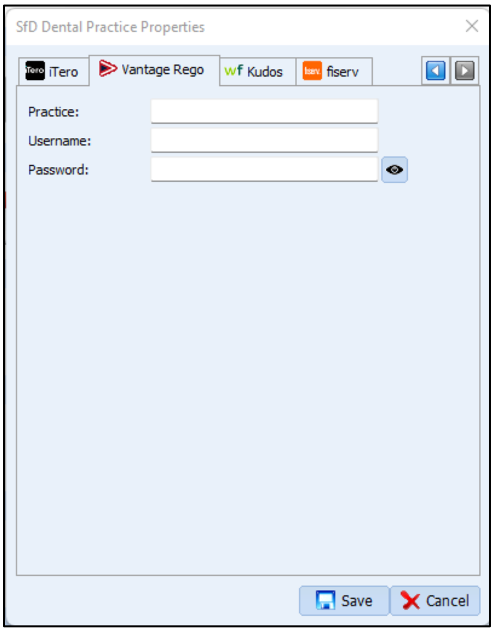
Within the practice properties the user will find a few different tabs available to change relevant practice information. In the **General** tab the user has the ability to change details for the practice such as name, email, phone and website.

There is also a tab available for **Address** which is where the physical practice address can be recorded and additional options for uploading the practice logo via **Image**.

The user will also find tabs for some software links such as Vantage Rego and Dental Referrals in the practice setup as explained below.

How to link Vantage Rego to SFD?

Vantage Rego is a referral-based software and can be linked to SFD to allow the practice to share key patient details from SFD into the Rego referral form without having to manually enter them. Once Vantage Rego is selected in SFD it launches the Rego platform, transfer patient information and allows the user to complete the referral.



Before setting up the link a practice code, **username** and **password** are required which can be accessed from the Vantage Rego team. To enter these details into SFD the user just needs to access the Practice Properties and navigate to the **Vantage Rego** tab.

The user will then just need to add those details to SFD and click Save which will allow them to start using the Rego link for patients.

How to link Dental Referrals to SFD?

SFD also links to Dental Referrals for both inbound and outbound referring of a patient. To add this link to SFD the user again just needs to access API details from the FDS team to allow them to connect the two systems. The details the practice will need are shown below:

Outbound Referrals:

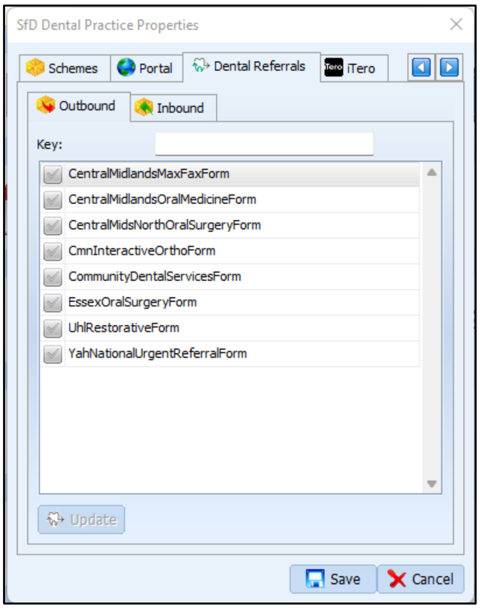
API Key

Inbound Referrals:

API ID

API Key

For inbound referrals the user can also select which patient status they would like new referred patients to have on their record.



Once the API key has been entered in the outbound section it will present the user with a list of forms which are applicable to their API key.

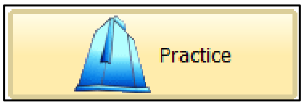
All that is then required it to tick the forms which the practice would like to use when referring a patient and then clicking save.

Now this has been setup the user can now launch a referral through Dental Referrals using the patient record in SFD.

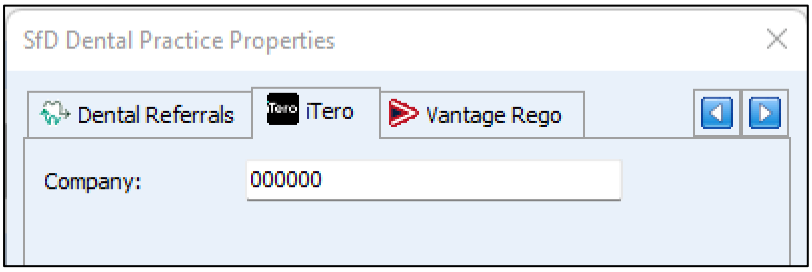
How to link your iTero to SFD?

SFD has a direct link to an iTero scanner which allows the practice to create the scan order from SFD meaning they don't need to manually enter patient details into the iTero. This will then automatically transfer the images from the scan into the patient record in SFD.

To link the iTero the first step is to enter the **Practice** section of the setup page.



The user will then just need to navigate to the iTero tab and enter the company number.

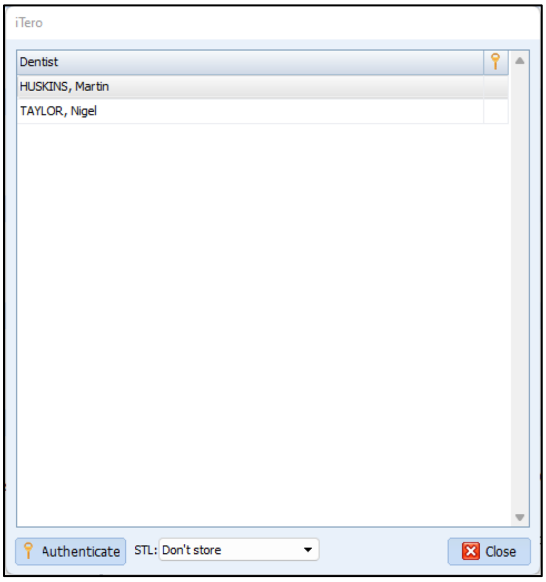


Once the company number has been inputted just click save.

(Note: The company number can be found in the system information section on the iTero scanner. The number is listed as "Office ID".)

Now that the company number has been added to SFD the only item remaining to setup is to link the clinicians to their iTero accounts. This can be done by going into the setup page and navigating to the External section and selecting iTero.

Within the iTero setup screen, you will then be presented with a list of the clinicians.



To link the My iTero accounts to the clinicians just highlight the dentist from the list and select **Authenticate** at the bottom of the window.

This will ask the user to log into the My iTero account for that user and once done it will pair the accounts meaning that this user can now use iTero through SFD.

There is also an option to store the STL files in SFD or not. If this is listed as “Don’t store” you will still have a quick link to view the scan itself from the patient image section on their record.

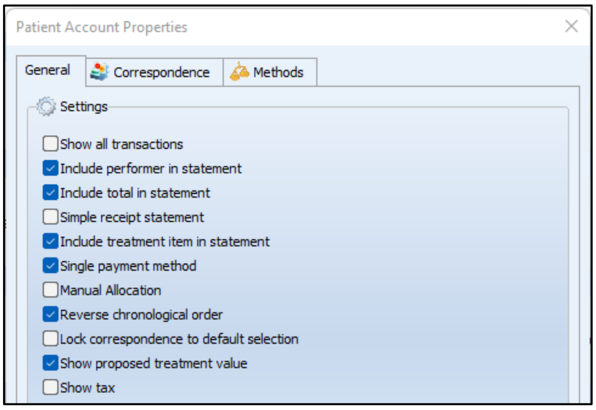
Patient Category

How to adjust the account types on SFD?

SFD as a default provides users with the option to record payments as Cash, Credit, Cheque and Finance but this can be altered within the **Setup** of the system. The first option is to change the system to use “single method payments” which will provide additional options for Credit Card, Debit Card and BACs.

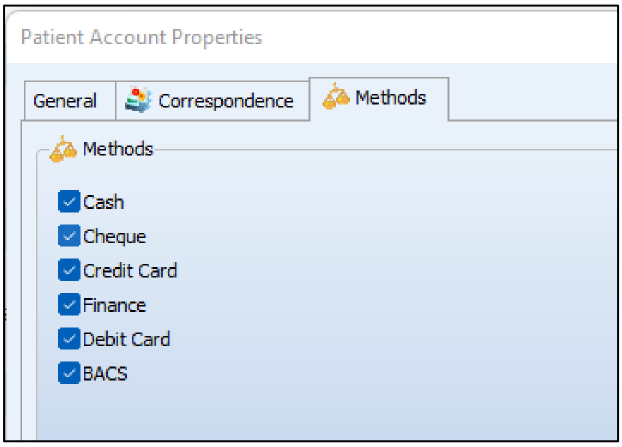
To switch over to single payment method in the setup page the user will need to access the **Accounts** section in the patient category.

This is will then show the user the **Patient Account Properties** screen where settings and defaults can be adjusted on the system.



On the list of options available the user can tick single payment method which will enable the users to record payments has more specific payment types such as Credit Card, Debit Card and BACs.

Within the **Patient Account Properties** screen we can also alter available payment methods by selecting the methods tab.



This allows the practice the further option of removing some payment methods that they don’t accept at the practice.

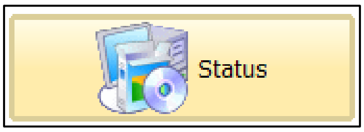
All the user is required to do is untick the payment method they don’t wish to have and then click save.

This will then remove it as an option when recording a patient’s payment.

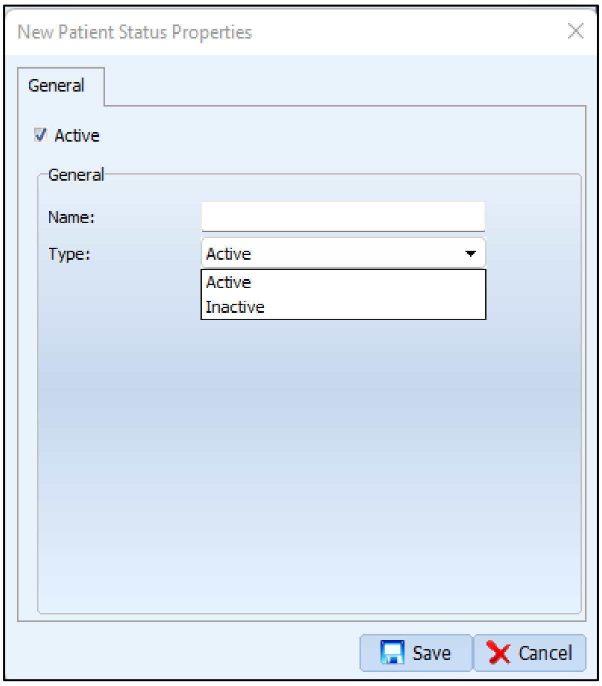
How to add/edit/delete patient statuses?

On a patient record in SFD a status can be recorded to mark that a patient is currently “Active” or they could have been “Discharged” so this allows the practice to record patients with a suitable status to keep current patient numbers accurate.

Within the setup of SFD the user can also add new statuses that are more suitable for their practice. To do this the user just needs to access the SFD setup page and navigate too the patient category. They will then find the option for **Status.**



Once selected it will then present the user with the Status Setup window showcasing all of the current status on the system. At the bottom of the window there is the option to create a new status or edit the one that is currently highlighted.



When adding a new status to the system the user just needs to enter the name of the status, they require and then the type whether the status is “Active” or “Inactive”.

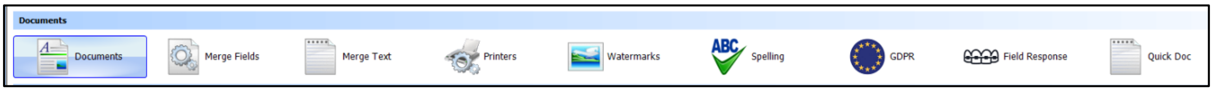
If a status is selected as “Inactive” this will mean that the patient won’t be found when searching for patient’s initially unless the search includes inactive patients.

Documents Category

How do I add document templates to SFD?

SFD has an inbuilt word processor meaning that a practice can store any document templates such as consent forms, patient care documents, patient communications etc in the system and can use them directly on a patient record.

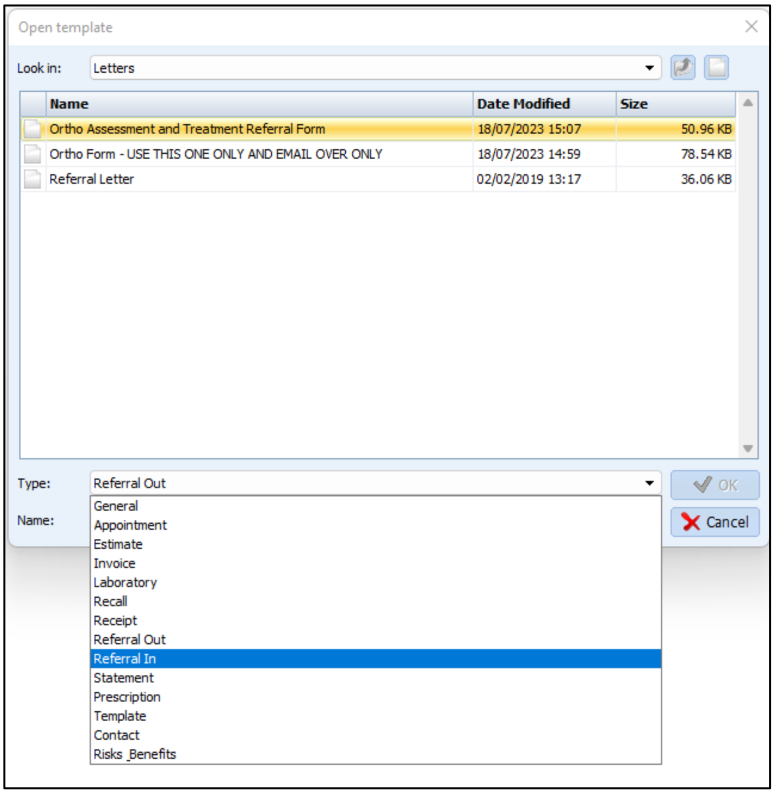
The practice has the ability to go into the setup and add, edit or delete templates as they choose to do so. If a practice does want to add a document template to SFD they just need to access the SFD setup page and access **Documents**.



Once Documents has been selected the user will be taken into the work processor so they can begin to generate their new document template. You can also edit any existing template by using the open option on the word processor toolbar.

Once open has been selected a list of document templates will appear on screen allowing the user to select and open the template, they want to make changes too. When the document is complete you can use the **Save** or **Save As** options from the menu to name and save any changes to the template.

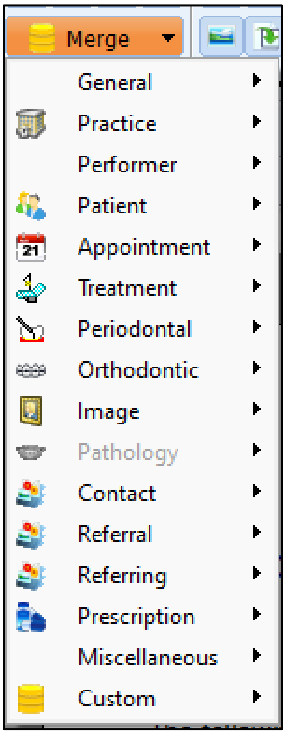
(Note: Be cautious of the type selected when in documents as you may not see the correct template if you have not selected the correct type as show below)



What are merge tags and how can I use them in Documents?

Within the SFD documents section the practice can have a list of template documents that are used for patient communications etc. These templates can have pre-defined text/practice information etc on them saving the practice from having to write out these details. A feature which is also available for this purpose is Merge Tags.

Merge Tags can be used to automatically pull information from the patient record onto a document again saving the practice from having to manually add it. These merge tags can be added from the document section when you have a template on screen you are making changes too by selecting **Merge**.



There is a list of categories listed once you have selected merge which will give you further options to select.

An example of this would be within the patient category you will find options such as Patient.Forename and Patient.Surname. If these merge tags were used it would automatically pull the name of the patient, you're generating the document for onto the relevant template.

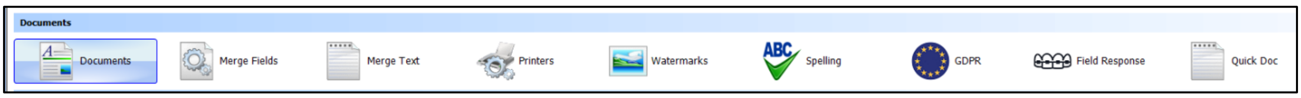
This can also be used however for patient contact details and address or it could be related to appointment information such as future appointment details etc

The merge tags are also commonly used on treatment estimates as it will pull in the treatment plan and financials of a course of treatment in automatically.

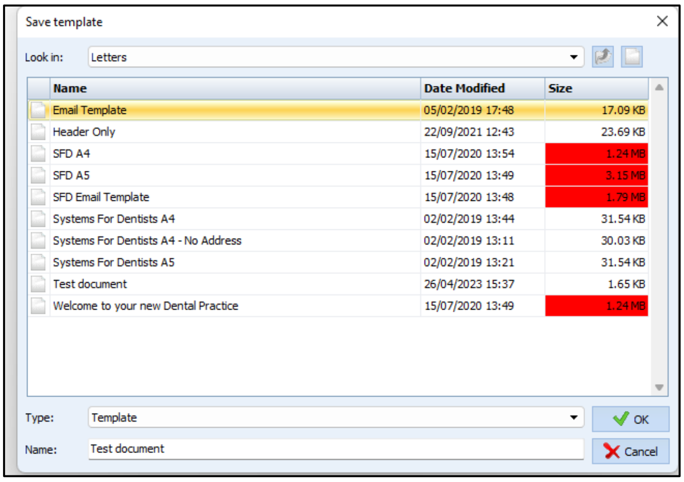
How do I create a document template for my header and footers?

In SFD you can create a number of different document templates. This can be useful if you want headers and footers on document etc. This allows templates to be added to multiple styles and documents. If for example you needed to change headers and footers in the future you would only have to change the template, allowing all document that you it to be automatically updated by only changing one document.

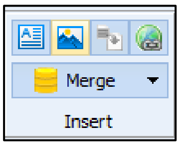
Click the SFD Tooth and select **Documents** from the document section of the setup menu.



A blank document will be created by default. You will need to **save** this first and choose where it will be saved. You will need to choose the document **type** and add a document **name**. If you are creating a brand-new Template you will need to change the document type as Template



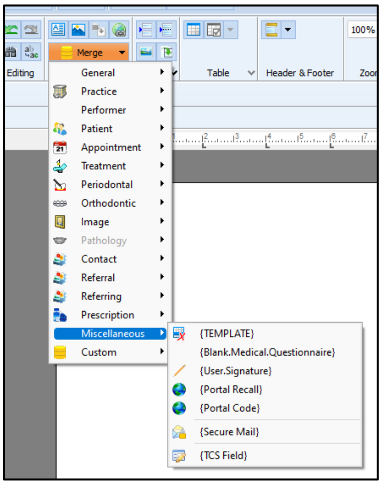
To insert images to your document. Select insert image from the formatting toolbar at the top.



Text can be added and edit like a normal word processor. However, Merge fields can also be added to allow patient details etc to be automatically added to a letter, to allow the same letter to be sent to multiple people without having to create multiple letters.

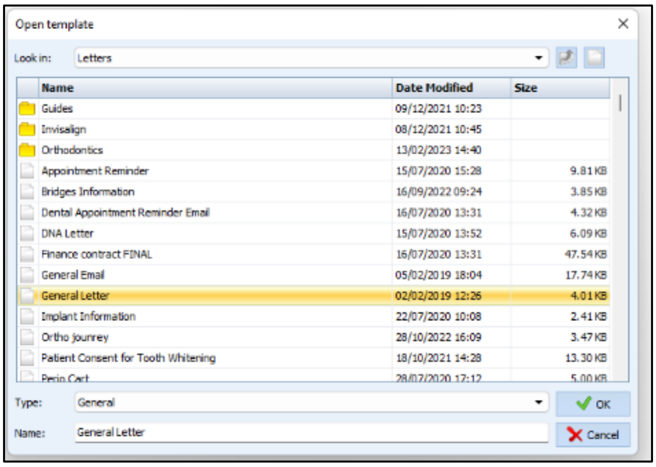
Select the Merge option from the formatting toolbar and select you merge field options from the drop down.

To create a Template, select {TEMPLATE} from the miscellaneous section of the Merge drop down list.



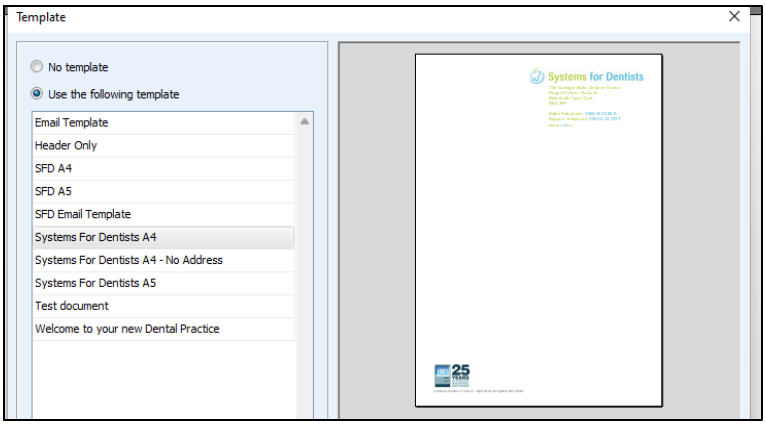
When all the items have been added to your template it needs to be applied to a document. For the purpose of this example, we will use a general letter.

Click **open** and select **general Letter**.



From the **page** option on the tool bar, select set page template.

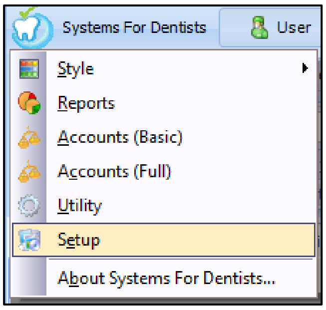
Select **use the following template** and pick from the list of templates. Complete the document and click save on the document. When the document is now used for a patient it will show with the template selected.



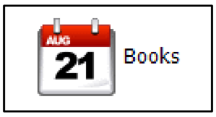
Appointment Category

How to create an appointment book for a user in SFD?

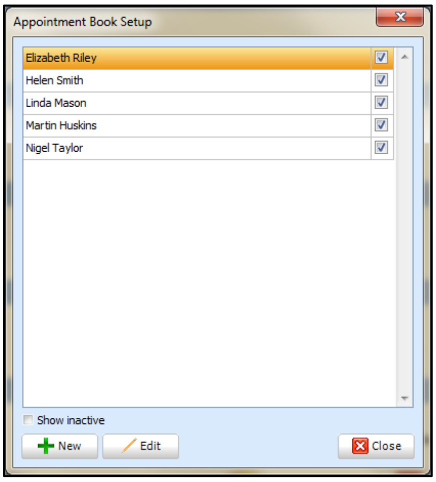
To access the Books setup, click on the Tooth button in the top left-hand corner of SFD and go into Setup.



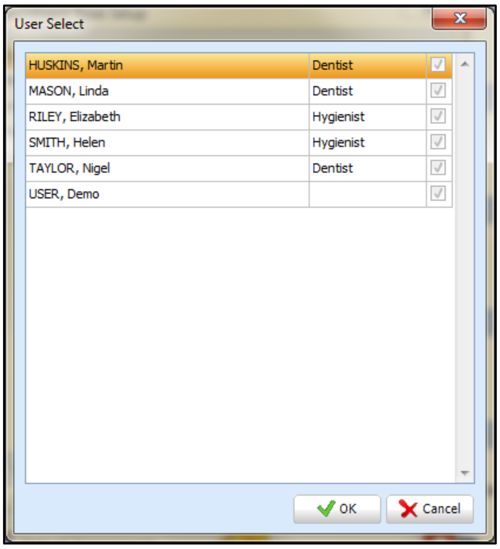
From there click on the Books button (Shown below), which is located under the Appointments bar.



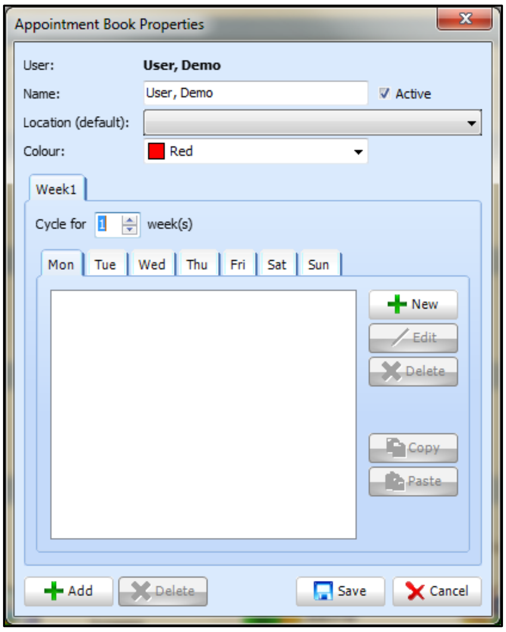
The Appointment Book Setup window should now appear. Within this window is a list of all the dentists/hygienist with an appointment book in the system. To see any inactive books, click on the Show Inactive checkbox in the bottom left-hand corner of the window. To edit any existing book, highlight the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



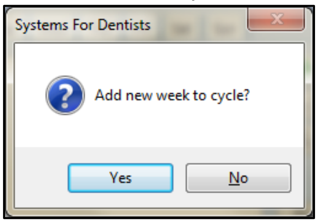
When creating a new Book, the next window which will appear is the User Select window (shown below) from this window just click on the person you want to create a book for and click on the OK button.



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.

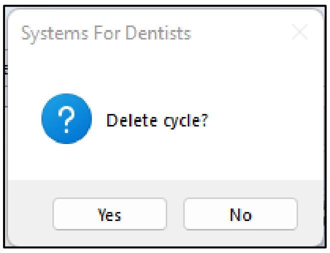


Once you have clicked on the Add button, the Systems For Dentists dialogue box will be brought up to confirm that you want to add a new week to the cycle, click on the Yes button to continue.



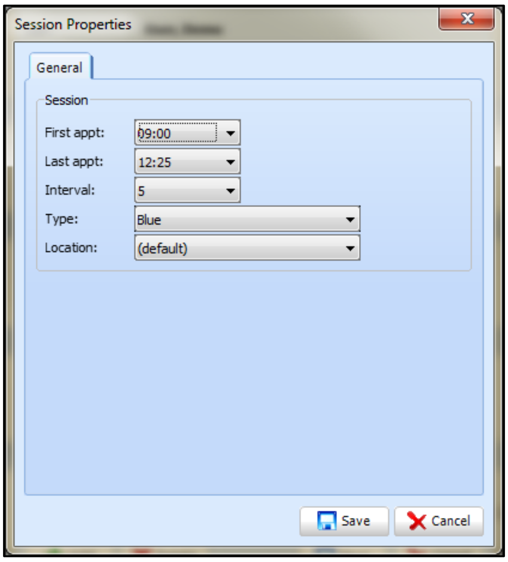
A new Week tab will now appear on the Appointment Book Properties window (shown below), with a whole new week of sub tabs beneath it.

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.



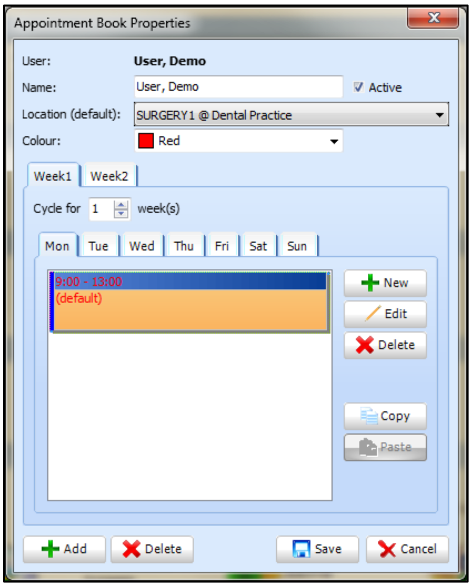
Right below the Week tabs, there is a number edit where you can enter a number, this number is for the number of weeks you want that particular week to cycle for until you move onto the next week on your rota.

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.

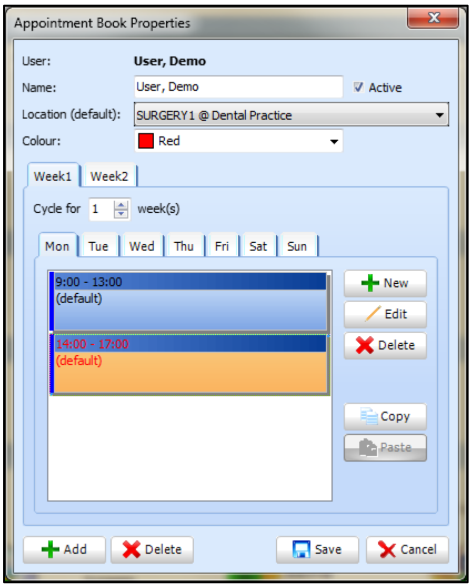


The Session Properties window will now appear (shown above). Within this window you will be able to set the time the session will start and finish via the First appt and Last appt drop down lists, what interval duration you would like your books to have and the type of session you would like to create. 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.

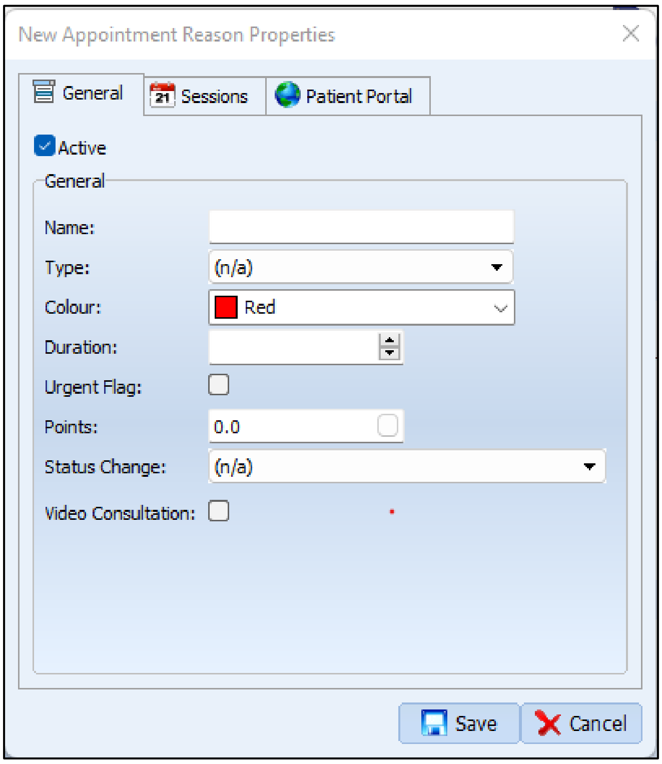
Now that you have entered in all the sessions you need for each week, click on the Save button in the bottom right-hand side of the window.
Your new book will now be created and ready to use within the system.

How to add appointment reasons to SFD?

The appointment reason list in SFD is completely customisable which means the practice can decide and adjust which appointment reasons they want or need and remove any that are no longer applicable.

To do this the user needs to access the Setup page of SFD and navigate to the **Appointments** section.

On the list of options select **Reasons** which will then show you the current appointment reasons available for a practice when booking a patient appointment. On the **Appointment Reasons** setup screen, you have the option to select New or Edit at the bottom.



When selecting New it will present the user with a blank appointment reason screen allowing them to input the name of the reason.

The user can also add some other useful key default settings such as colour which is what will display on the appointment book.

You can also add a standard duration which means this doesn't need to be adjusted each time that reason is used to book an appointment.

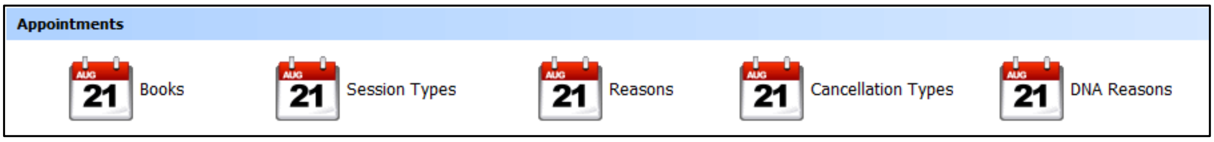
Another useful option is the urgent flag which might be used to reasons such as pain etc.

If used this will then show an ambulance symbol on the appointment book to alert the clinician that it is an urgent appointment.

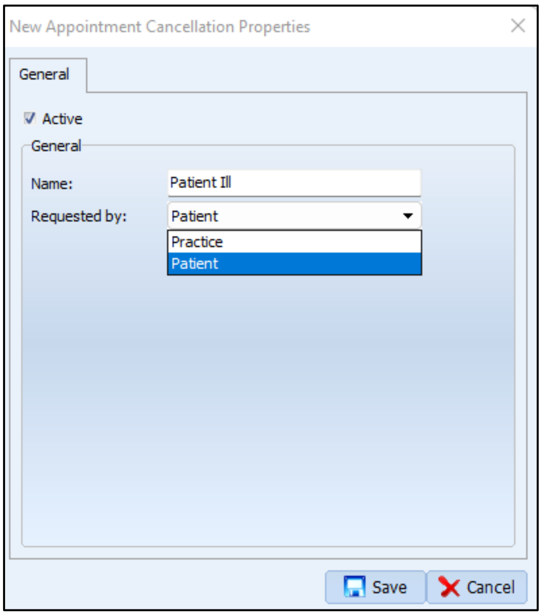
How to add different cancellation types to SFD?

When cancelling a patient's appointment in SFD you will get the option to select the reason why the patient or practice is cancelling. The list provided is a preset cancellation list that is dictated by what is setup in the Cancellation Types in setup.

To make changes to the Cancellation Types navigate to the **Setup** page of SFD and go to the **Appointments** category.



Select **Cancellation Types** from the list of options and this will then load all the current cancellation types available on screen. You can create new types and also edit the existing options from the bottom of the Appointment Cancellation Reasons setup page.



When selecting New, SFD will then present a window called New Appointment Cancellation Properties which will allow the practice to add in a name such as "Patient Ill".

Along with the reason the system will ask the user to record who this cancellation has been requested by whether it was by the patient or by the practice.

In the case of a patient being ill this would therefore be selected as requested by "Patient".

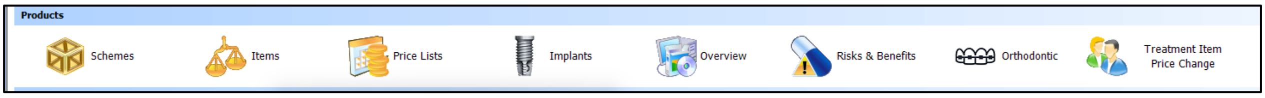
Once these details have been entered into the appointment cancellation properties you can then select save to record the changes.

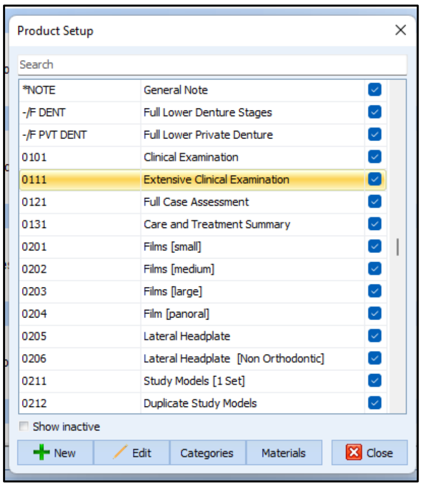
Products Category

How do I add treatment items?

In SFD treatment items can be added for the different treatments offered by the practice which can be changed and added at any time.

To add or edit a treatment item navigate to the setup page within SFD and select Items from the Products category.



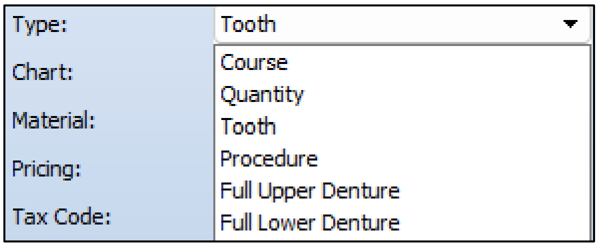


Once Items has been selected the product setup screen will appear on screen showing you a list of all of the active treatment items on the practices system.

This list will contain a mixture of items across all schemes such as NHS codes and also separate private codes.

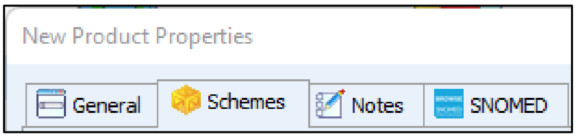
You can add or edit items from this window.

If you want to add a new treatment item just select New and SFD will present a blank Treatment Item setup form. On this form you can enter details such as the product item code and product description. You can also select what type of treatment code it is whether it is as displayed below:



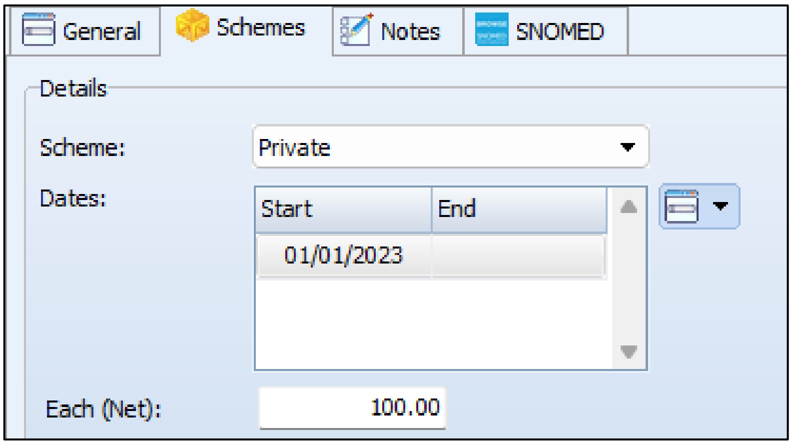
- **Course:** An item which is not directly linked to teeth. Example: Examination
- **Quantity:** An item not directly linked to teeth but may do multiple. Example: Xray's
- **Tooth:** An item which is used by clicking on the tooth on the patient's chart.
- **Procedure:** A quick plan option for adding multiple treatment items at once.
- **Full Upper Denture:** Quickest way to add a full upper denture to the chart.
- **Full Lower Denture:** Quickest way to add a full lower denture to the chart.

Once you have added the required settings such as the item name and how it will be added to a treatment plan the user will then need to make this item available by navigating to the scheme tab.



Within the scheme tab you can select between the different schemes the practice has available for patient and create a start date that this treatment item will be available from. Select the scheme from the drop-down list and then to create the start date click on the additional options  button and select Add.

This will then allow you to enter the start date for the item and once saved you will have an option to add the net price as displayed below.



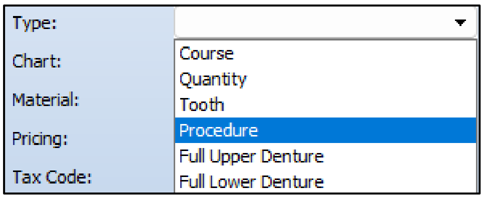
Simply add the price and then click save and this item will then be available to use on a patient's treatment plan.

How to add a Procedure?

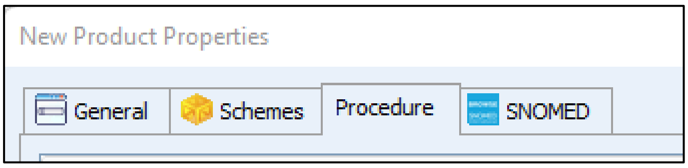
An option that tends to be very popular in SFD is what we call a procedure and this is because it allows the user to add multiple treatment items to a treatment plan by using one code. A procedure can contain as many treatment items as the user would like and can also separate them into appointments meaning that the user doesn't need to setup the plan each time.

To setup a procedure the user needs to access the **Items** option within the SFD **Setup** page.

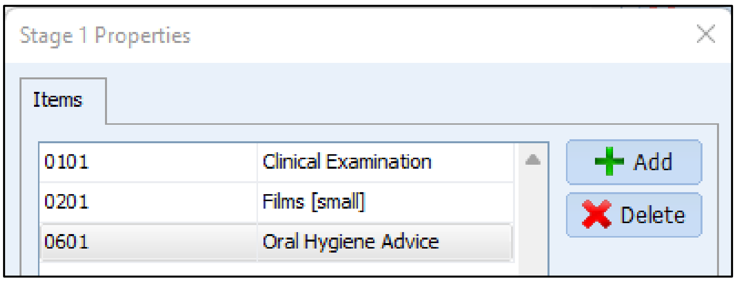
Once selected the user will see a list of the current treatment items on the system and have the ability to select **New** at the bottom of the Product Setup screen. The details of the procedure can then be inputted such as Name, Description etc but in order to make this item correctly the Type must be listed as Procedure.



When the type is selected as procedure the tabs available at the top of the **New Products Properties** page will change and now include a tab called **Procedure**.



Within the new product properties the user can use the Add option to create Stage 1 of the procedure. All that is required is to add the treatments to Stage 1 for the first appointment of the procedure.



When you are happy with the setup of Stage 1 you can then select Save and add any additional stages that are required. When creating any additional stages there is also a useful option to set the duration at the bottom of the **Stage Properties**. This duration will then be the default included in the procedure if the appointment needs to be booked in.

When the procedure setup is complete the user will then need to add a start date from within the scheme tab. You can select between the different schemes the practice has available for patients and create a start date that this Procedure will be available from. Select the scheme from the drop-down list and then to create the start date click on the additional  options button and select Add. This will then allow you to enter the start date for the Procedure.

How to update the price list at once by a %?

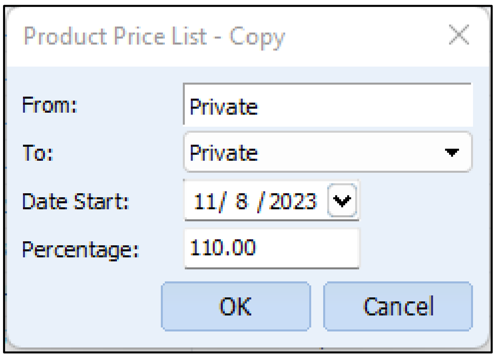
Within SFD there is a feature which has the purpose of allowing users to quickly change treatment item prices rather than going into each individual one and changing them. This feature also allows the user to update the prices automatically if they are having a fee increase by a certain percentage. To access this, feature the user just needs to go into the SFD Setup page and navigate to the **Products** section.

Within Products there will then be an option for **Price Lists**.

When selected this will bring up the Price Lists setup screen which allows the user to select the scheme, treatment item and then present the option for changing price. The user can go through items and change prices one by one per scheme if they wish too but there is also the option to **Copy List** at the bottom of the screen.

The Copy List option is how the practice can quickly adjust pricing based on a percentage for all items within a scheme at once. The user just needs to select the scheme they want to copy from the left and then select the Copy List button.

The user will then get the Product Price List – Copy screen appear on screen.



This allows the user to select which scheme they are copying the prices too, which date and the percentage. If you are increasing the price then copy to and from the same scheme as displayed in the screenshot above. Also, if the price increase was going to be by 10% then on the percentage option change it to 110. This will then copy a 10% increase on the current prices on that scheme.

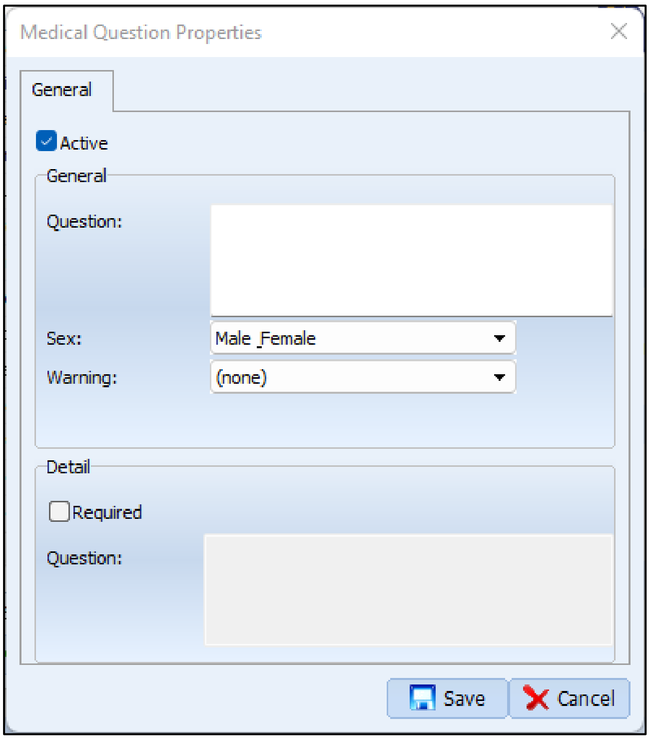
Medical Category

How to add/edit/remove Medical History questions?

In SFD the medical history questionnaire for a patient can be altered to suit the needs and requirements of the practice meaning they don’t have to stick to the questionnaire which is a default in the system. To make these changes the user will need to access the SFD setup page and navigate to the **Medical** category.

Within this category there will be an option for **Questions**.

Once selected this will give the user a list of the current medical questions which are be used for patient medical histories. At the bottom of the **Medical History Setup** screen there is also the option of New and Edit to adjust the questionnaire if needed. To add a new medical history question just select New and a **Medical History Properties** screen will appear as shown below:



On this screen the user as the option to make a question Active which means it will appear on the patient medical or by unticking it will no longer as that question.

The user can type out the medical question into the question field and also use the option below for Sex to dictate which patients would see this question.

Below there is an option for Warning which means that if the patient answers yes, the question the practice will be alerted when opening the patient record.

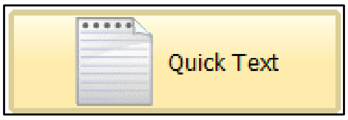
The final option is for further detail. Some questions will require some additional details should the patient have answered yes such as “Do you smoke cigarettes?”. If answered yes and you would like further details just tick the Required box and enter the additional details question, for example “How many per day?”. This will then mean that if the patient answers yes, they will get another prompt to input the amount per day.

Miscellaneous Category

How to add Quick Text clinical note templates to SFD?

SFD allows performers at the practice to have their own custom templates for clinical note purposes saved within the system which we call Quick Text. This is to save them time in surgery from having to type up notes every time they see a patient. It is also a way that some practices will ensure that clinical notes are standardised across all performers at the practice.

To add a quick text template to SFD navigate to the Miscellaneous section of the SFD Setup page and the second option will be **Quick Text**.



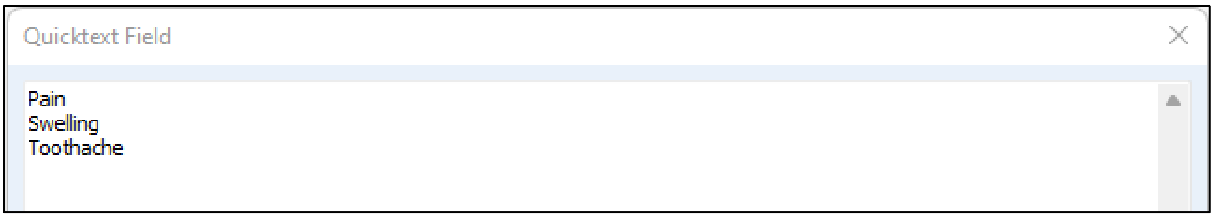
This will then open the Quick Text editor which is where the template can be typed up and customised. If the performer already has templates in a word document etc they can be copy and pasted into the editor. Once the user is happy with the setup of the quick text template it can then be saved from the top of the editor and provided with a name and added to a folder structure if needed.

How to add dropdown options in Quick Text?

A popular option in the quick text section is the ability to add drop down options within a template allowing the clinician to just select the relevant option for the patient rather than type it in each time. The drop downs can be customised to contain anything the practice would like to have as options so are often used for areas of the notes like Complaining of etc.

To add a drop down to a quick text template the user will need to navigate to the Quick Text option in Setup and load the template they want to edit. Once the template is open on screen the cursor needs to be selected where the user would want the drop down to appear. You will then need to select the option on the editor tools called “Field”.

This will present a text box which allows the user to list the answers with a line break after each answer.

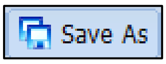


Once all of the answers have been inputted just click save and this will update the template with the dropdown option. Within the template and on the quick text template it will display as "(Please select...)" which when clicked it will present the options.

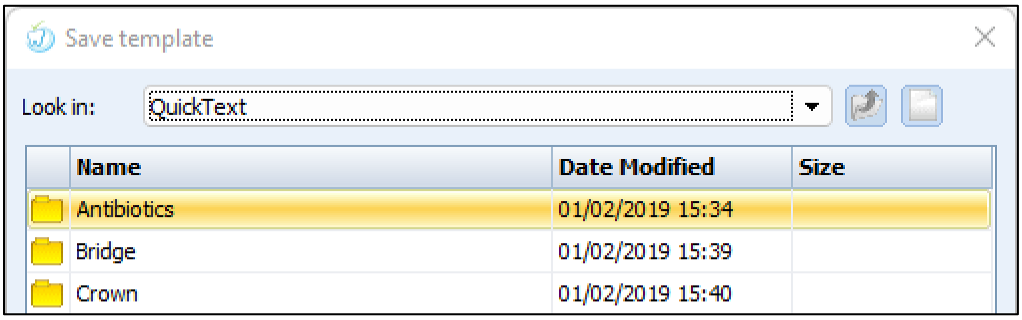
How to create a quick text folder?

Within the Quick Text section of SFD you can also create folders to structure note templates if required. This is often used as different clinicians want to use their own templates and they will therefore create folders to avoid it being a long list of everyone's templates mixed together.

To create folders for note templates you will need to access the Quick Text section of SFD and then select the Save As option from the menu.



In the top right of the Save template window there will be a fold button which allows the user to create a new folder and give it the appropriate name.

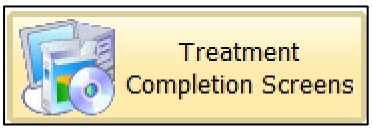


Once saved this will then create your new quick text folder on the system and templates can then be saved within that folder.

What are Treatment Completion Screens and how can a practice use them?

Treatment Completion Screens (TCS) is a version of a custom screen which can be created and customised in SFD for whichever purpose a practice would find beneficial. The screens can be very simple or very complex based on the user's preference as they come with a lot of different options for recording information. Any TCS that are completed will also save a copy of the results into the correspondence so is often used for Xray reporting etc.

To create or edit a TCS in SFD you will need to access the Setup page and then under Miscellaneous there is an option for **Treatment Completion Screens**.



When selected by the user it will show a list of current Active treatment completion screens and also give the user the option to create a new TCS or edit an existing one. When creating a TCS the user can select how big the screen is and how many pages are on the screen and also has a list of options to add to the screen for recording information as displayed below:

ComboBox

A Combo box is a drop-down list allowing the user to have a list of options and then be able to select one of those options for the patient.

CheckBox

A Check Box is the equivalent of a tick box. It can be labelled with whatever is required and the user can then tick this if applicable for a patient.

Radio Group

The Radio Group will display multiple options on screen straightaway but it will only allow for one option to be selected.

ListBox

The list box allows the user to select from a list of predetermined options. It also however if enabled allows for multi selecting options from the list so it can be used effectively for that purpose.

Memo

The Memo option allows the user to unput text onto a TCS. This is the equivalent of a text box.

Date

If the date option is used on a TCS it will allow the user to select a date from a calendar which will record in the notes. The date format recorded is DD-MM-YYYY.

Label

The label option in TCS is to put titles throughout the screen. It is often used if there are multiple sections in a TCS for screens such as Exams etc.

Money

The Money option allows the user to input a numeric value as some practices will record these details for the purpose of patient contracts etc.

Integer

Integer is another option for adding a numeric value into the TCS.

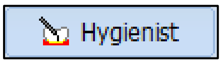
Radio Button

The Radio Button is another equivalent of a tick box. This will record the results as Y if clicked or N if it wasn't.

BPE

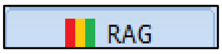
The BPE option allows the user to fill in a Basic Perio Exam chart on the TCS. This does not update the BPE anywhere else on the patient record.

The dentist option allows the user to select from a list of dentists on SFD.



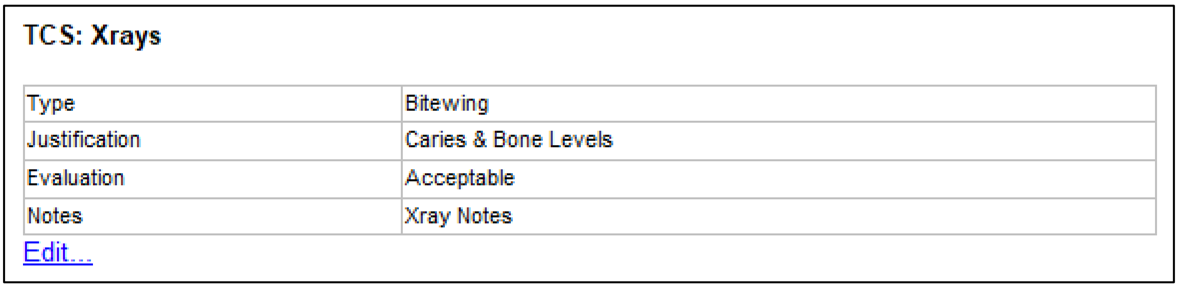
The hygienist option allows the user to select from a list of hygienists on SFD.

The Chart option allows the user to select which teeth are applicable to the TCS on a dental chart. It doesn't allow any treatment charting like fillings etc it only allows teeth to be selected.



The RAG (Red, Amber, Green) option allows the user to do a RAG score on a TCS.

Using these options, the user can create a screen to record the clinical notes they require and can layout the screen however they want. Once the screen has been completed it will the record the details in the patient's clinical notes as shown below with a Xray TCS example:

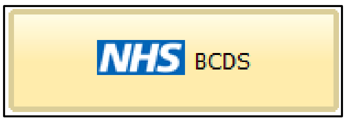

TCS: Xrays

Type	Bitewing
Justification	Caries & Bone Levels
Evaluation	Acceptable
Notes	Xray Notes

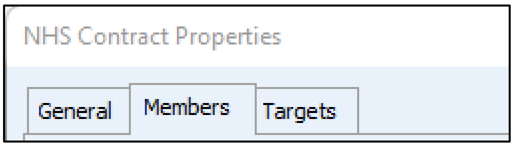
Edit...

How to add a user to my NHS Contract (England)?

If you are an NHS practice in England it is important that you have the performers for the practice registered against the NHS contract for the purpose of submitting claims. To add a performer to the NHS contract you will need to access the **Setup** page of SFD and then select **BCDS** within the miscellaneous category.

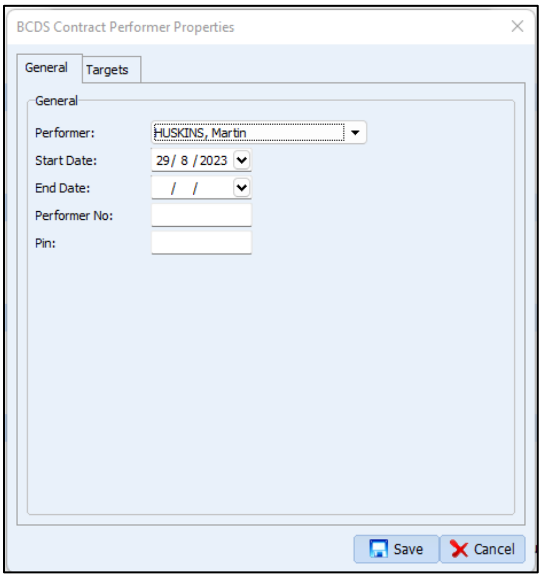


Once selected you will then see a list of the contracts the practice has setup on the system. At the bottom of the BCDS Contract Setup page there will be the options to create a new contract of edit an existing one. To add a performer, you would need to select the contract to amend and select edit which will bring up the main contract details. There will be a list of tabs at the top of the setup which will include **Members**.



Within the members tab you will see a list of all the current performers on the contract and on the right of the window you will have the New and Edit options to adjust or add new members.

To add a new performer to the contract, select New and it will display the required settings on screen for the performer as shown below:



The user will need to enter the Performer from the drop-down list and then enter the start date for them on the contract as well as the end date if applicable currently.

The performer number and pin are also required in this section and it is essential the details are correct otherwise the claims for this performer will not be sent successfully.

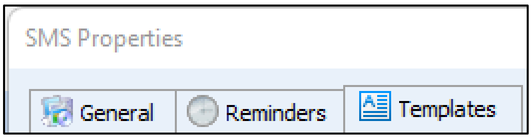
One the required details have been entered the user will just need to select Save and that will add the performer to the NHS contract meaning they will now be able to open NHS treatment for patients and submit the claim through to the NHS.

How to add a SMS template?

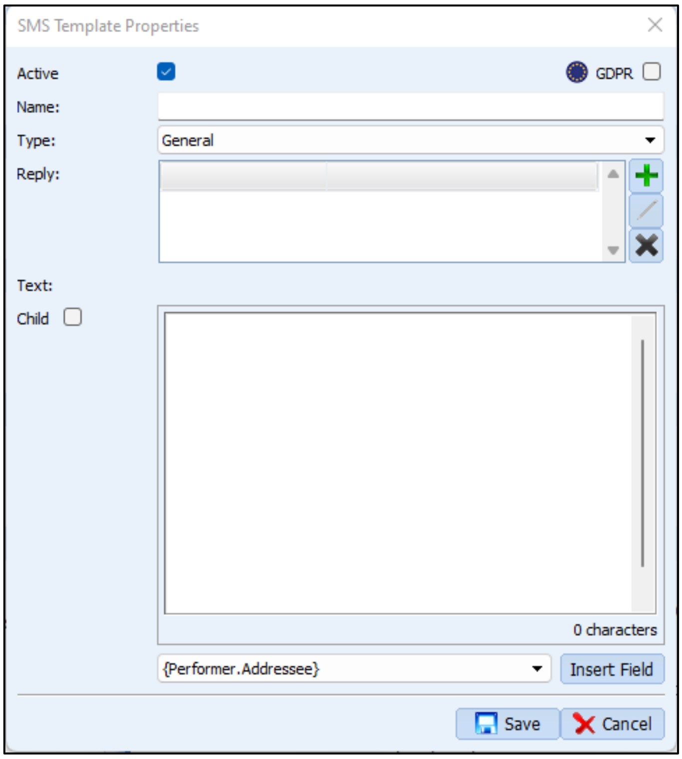
Within SFD there is the ability to send SMS to patients whether it is mass SMS, individual SMS to patients or automatic appointment reminders/recalls etc. It is therefore important that the practice have the ability to create and customise SMS templates that are required for patient communications.

To add a SMS template to SFD the user will need to access the Setup page and navigate to the miscellaneous category which is towards the bottom of the page. Within there the user will find the SMS options where all the templates are stored.

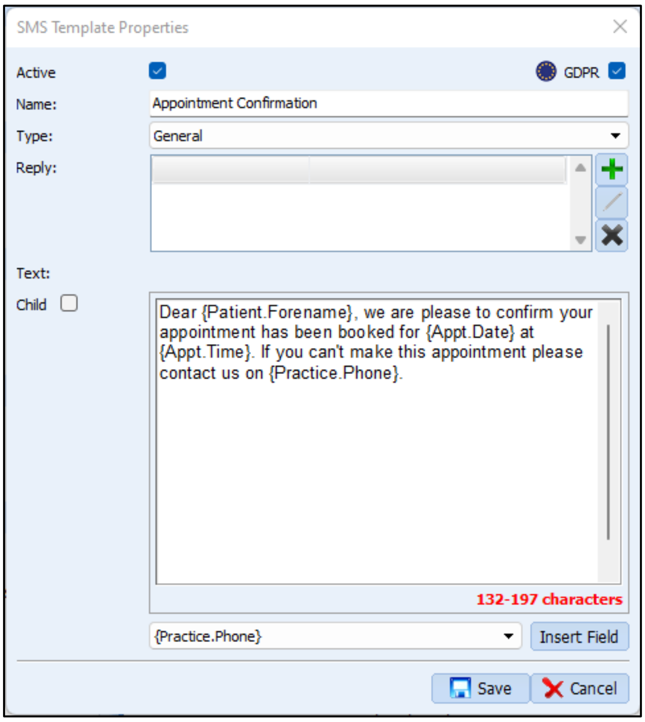
Once SMS in setup has been selected it will display the SMS properties window on screen which contains a few tabs. One of those tabs is Templates and this is where the practice can adjust or create new templates for SMS to patients.



Within Templates the user will see a list of the existing SMS templates and can use the edit option to make any changes to those. To create a new template the user just needs to select New from the options list which will prompt the SMS Template Properties window to appear.



The user just needs to add the details for the SMS template such as the name of the template, the type and then the content in the text box below. The templates can automatically bring certain bits of information from the patient record onto the text also using the merge tag fields which can be inserted at any point of the SMS.



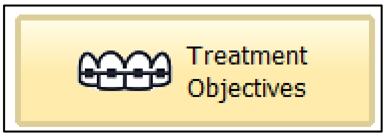
Once the template has been inputted the user should be aware that there is a character count which will display in red as shown when a SMS template might be over one SMS.

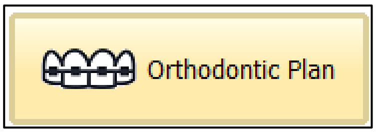
The character limit is 159 characters for one SMS message and once it hits 160 the text will show in red as this would potentially incur an additional cost. If the character count shows a range such as 132-197 characters, it will mean that the merge tags used such as the patients name could vary.

How to add Orthodontic Objectives and Orthodontic Plan templates?

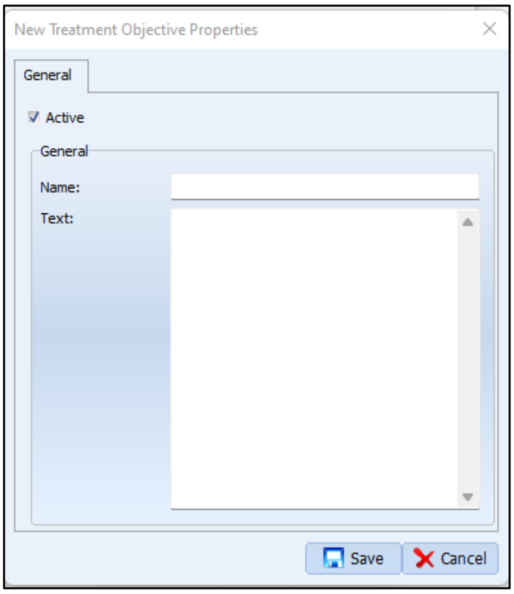
Within SFD there is the ability to do Orthodontic Assessments and also other features available for any orthodontic recording. Some of the options available in Setup for customising the Orthodontic features are the Orthodontic Objectives and Orthodontic Plan. This allows the practice to have templates for text setup in each section to prevent them from having to type out the objectives or plan each time they create one for a patient.

To add these templates to the system the user will need to access the Setup page of SFD and navigate to the miscellaneous category. Within there they will find the options for Treatment Objectives and Orthodontic Plan.





To add Treatment Objectives the user will need to select the Treatment Objectives option which will then display a list of all the current templates. SFD has some pre loaded templates for clients to use but these can be edited or removed if not suitable for the practice. To create a new one the user just needs to select New. The user will then be prompted with the New Treatment Objectives Properties screen allowing them to input the template.



All that is required to add a new template for the objectives is to provide a name for the template and then the main body of the template in the text box.

Once inputted the user can Save the treatment objective and this template will now be available to use of a patients orthodontic treatment plan.

The Orthodontic Plan templates can also be added to SFD in a very similar way. The user will just need to select Orthodontic Plan instead of Treatment Objectives and they will then get the existing list of templates. Using the New option they can then provide the name of the template and content which can then be saved when complete. This will again mean that the template Orthodontic Plan can be used on a patients orthodontic treatment plan.