Consentz

Getting Started Guide

Contents

After Completing Onboarding...

First Look around

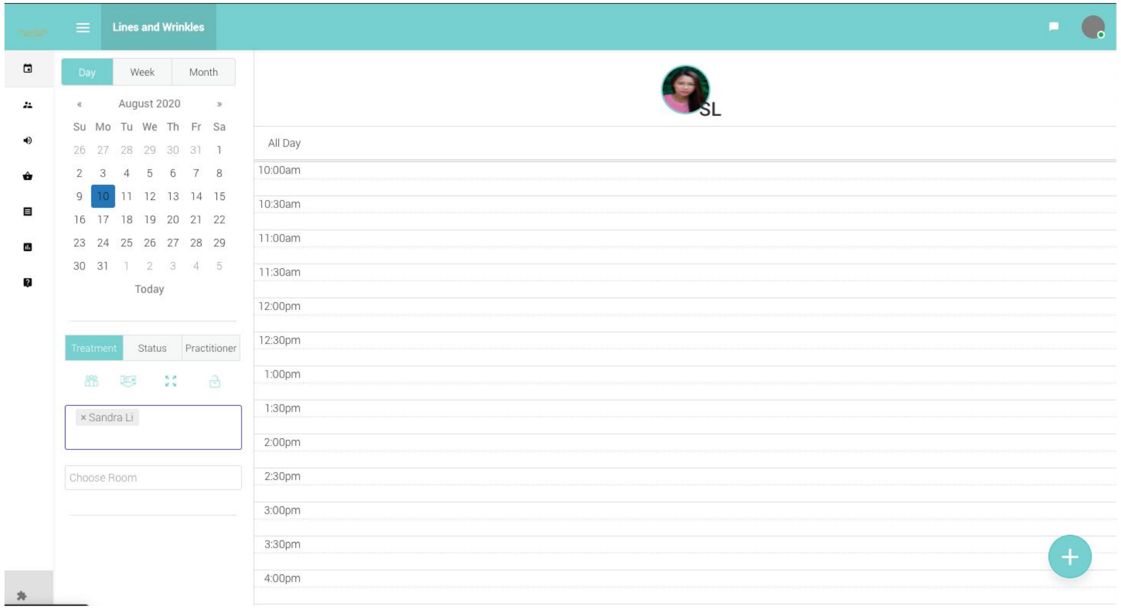
Welcome to your new Consentz account!

During the onboarding process you will have added team members, selected products, treatments and forms all designed to get you going as quickly as possible.

The Main Menu can be access from the left hand side of the screen, allowing you to navigate between the main menu items, such as 'Calendar' and 'Patients'

'Set Up' and "Settings' are located at the bottom of this menu. They contain additional menu items for setting up the clinic account.

Why don't you take a look around and get familiar with the layout?



The 'Calendar" Screen

Add a licence

You'll need an active licence to access the Practitioner App. You can manage active licences from the Settings -> Licence page, and add a licence using the + button.

Quick Tips

Are you seeing an error?
An Amazon 'SES' confirmation email will have been sent to your clinic email address. Please click on the link in that email to verify the account.
Check the FAQs at the back of this guide for more.

Adding more Team Members

Team Members

You can add more team members to your account by accessing the Team Members page which can be found in the 'Settings' -> 'Team' menu.

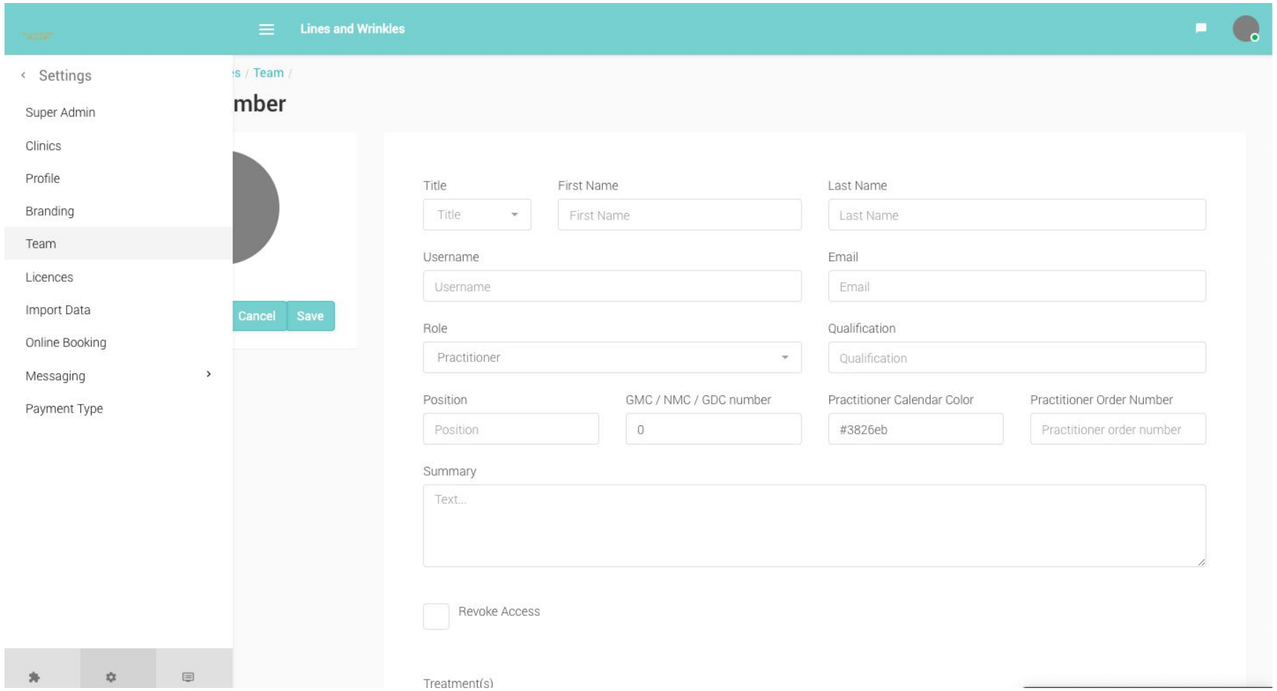
Click the '+' button to add a new team member.

Different roles have different access levels, for instance:
Practitioners can access the ipad App to record consultation;
Clinic Admin - have full access to the control center;
Reception - have reduced access to the control centre.

Each user will need a unique username that they'll use to access the account.

Once completed click 'Save' and the new team member will receive an email requesting them to set up their password.

Once the password has been set up, they will be able to access Consentz.



A 'Team Member" Screen

Quick Tips

A Practitioner role is required to access the Practitioner App in full. Other roles will only have access to the 'Patient Mode' section and will be unable to access the Patient Record to create consultation notes.

Don't forget to add Treatments to your Practitioners!

Products and Treatments

Add Products

‘Products’ can be found within the ‘Set Up’ menu and allows you to manage a list of physical items that you sell or use for treatments.

You will be manage quantities and (optionally) batch numbers. (see pg.7)

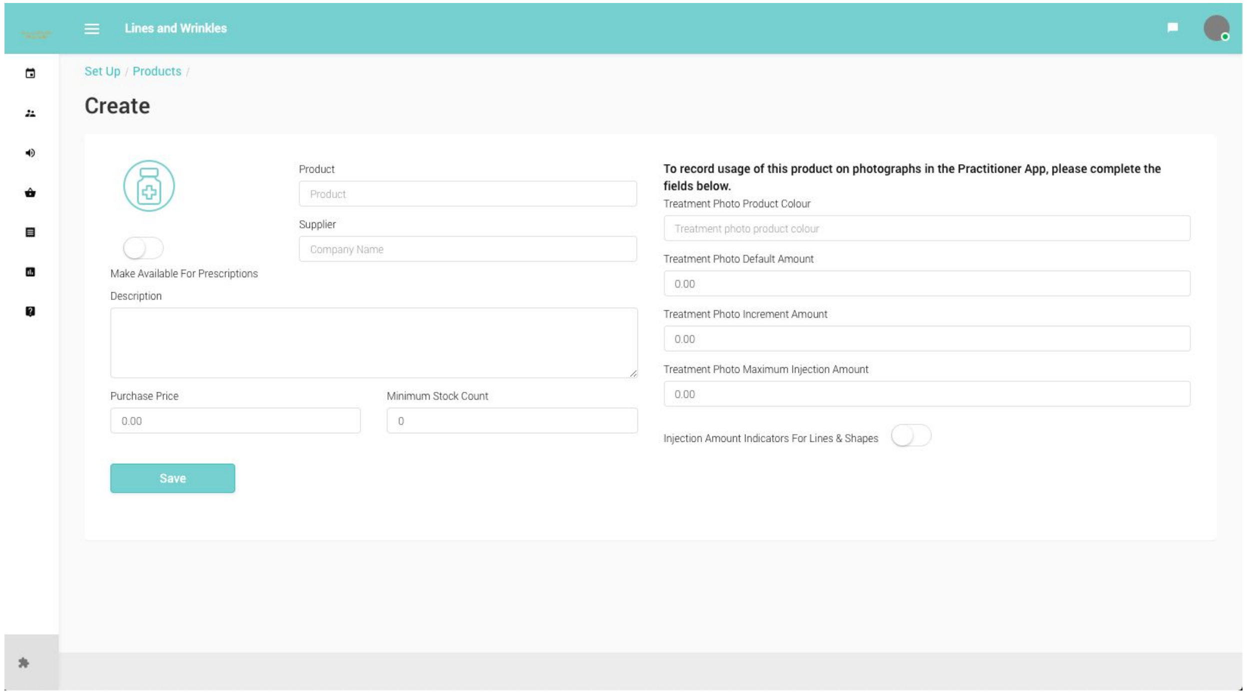
Click the ‘+’ to add a new Product.

To record product usage on a ‘Treatment Photo’ (Practitioner App - iPad) you should enter values into the fields on the right hand side of the screen.

These values will appear on the Practitioner App when a practitioner selected the product.

If you wish to use this item in a Prescription, toggle the switch at the top left of the page.

You can also add images of your products by clicking on the thumbnail at the top of the screen, and following the file selection options.



New ‘“Product” Screen

Quick Tips

Make sure the values entered into the fields for Treatment Photos are all more than zero - otherwise they’ll make no difference

Products and Treatments

Add Treatments

Treatments are used for booking appointments, writing notes and marking photographs.

They can be linked to products.

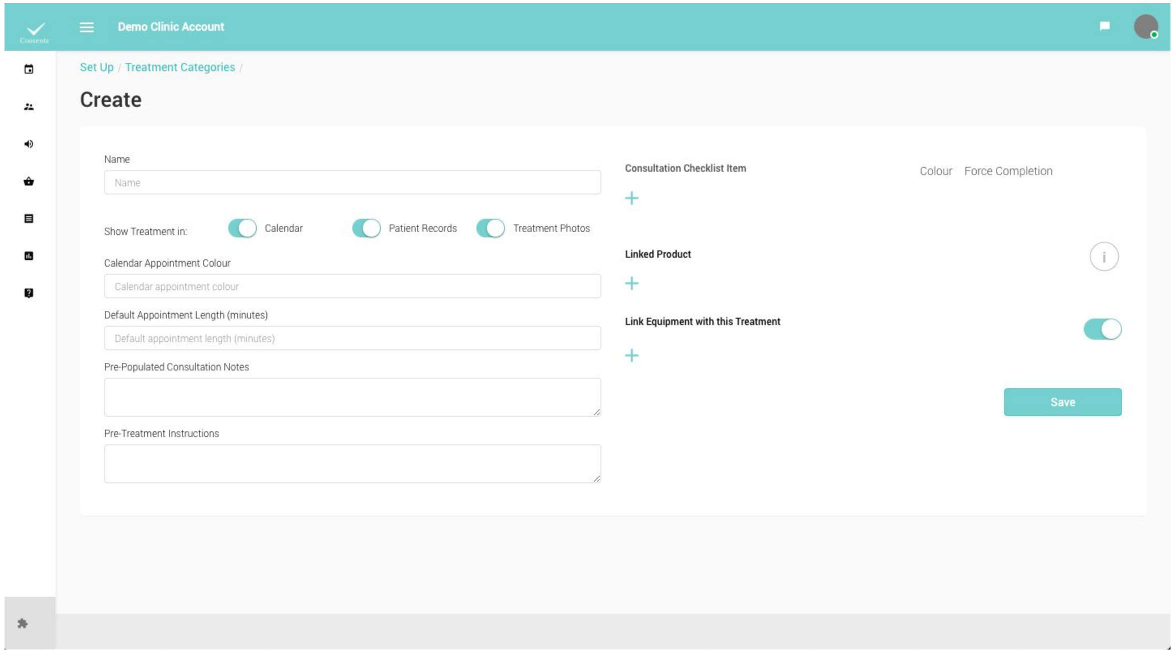
‘Treatments’ can be accessed from the ‘Set Up’ menu.

You can set:
calendar colour for the treatment;
a default appointment length;
prepopulated notes that will appear in the Consultation notes on the Practitioner App (iPad)

If a Treatment is to be used for marking photographs a link to a product needs to be established.

This can be done by clicking the + button next to ‘Linked Products’ and selecting a product from the list.

Linked Products will then be selectable from the Practitioner App.



New ‘Treatment” Screen

Quick Tips

Don’t forget to establish the Treatment - Product relationship so that a photograph can be marked up on the Practitioner App.

Products and Treatments

Adding Batch & Stock

Stock and Batch numbers can be entered into the system as new stock is delivered, using the ‘Goods Received’ menu, found under ‘Stock Control’.

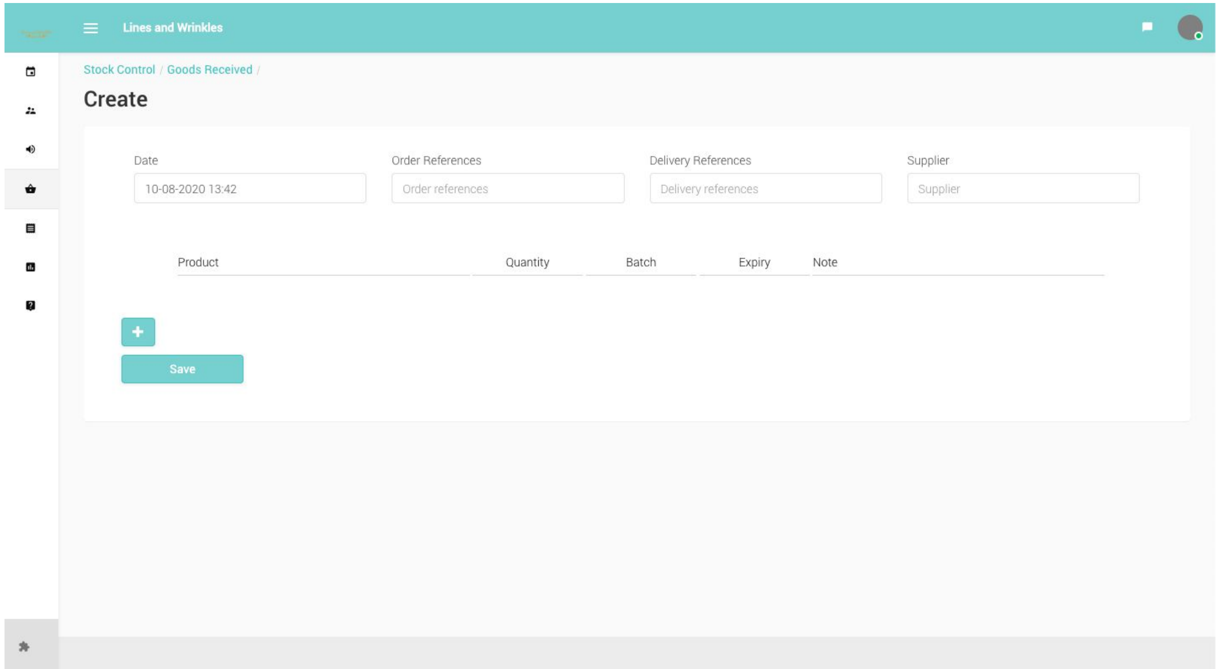
A Goods Received Note (GRN) creates a digital receipt of products arriving from a vendor. Quantity, batch and expiry details can be added to each Product.

Create a new ‘Goods Received Note’ and then ‘Add’ the products you wish to assign a stock count, batch numbers and expiry date to.

The Truck icon at the end of the line is pre selected to add the product to stock apon saving the note.

In future, any new deliveries of stock can be record here, by creating a new note.

Stock control is optional and not managing stock will not stop you from making bookings or recording consultations



A new ‘Goods Received Note”

Quick Tips

You can manually adjust a product’s stock count from the Stock Menu - useful for unforeseen events.

Price List Items

Price List

In order to create invoices, you first need to create ‘Price List’ items. Price list items can then be selected and added to an invoice.

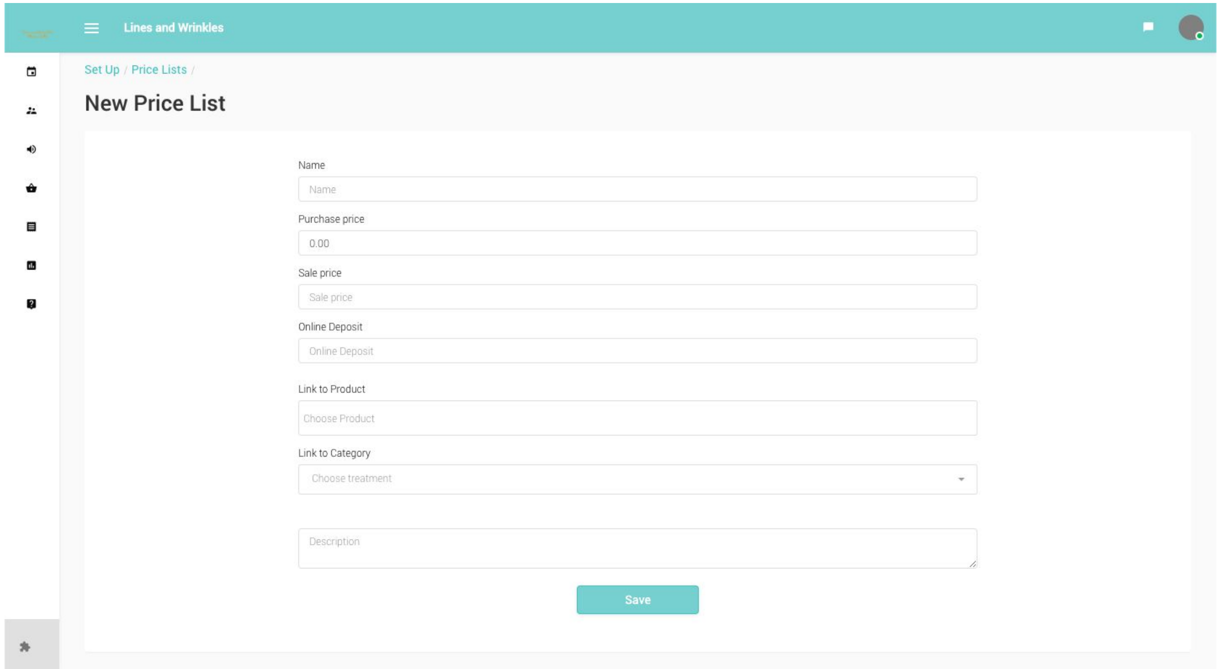
A Price List item is any product or service you would want to display on an invoice and assign a price to.

The ‘Price List’ page can be found under the ‘Set Up’ Menu. Select ‘+’ to add a Price List item, or the name of a price list item to edit in line.

‘Purchase Price’ relates to the cost to you, ‘Sale Price’ is the value that the patient will see on their invoice

By adding a product to the price list item, each time that price list item is added to an invoice, the corresponding stock value will be reduced.

Linking a price list item to a Treatment Category is used to better organise reporting.



Creating a new Price List item

Quick Tips

You can apply discounts to a price list when adding to an invoice.
Online Deposits are only used with the Online Booking Widget.

Consent Forms & Questionnaires

Clinic Library

Consent forms can be added from the 'Consent Forms' page under the 'Set Up' menu. Any .pdf file can be added as a Consent Form.

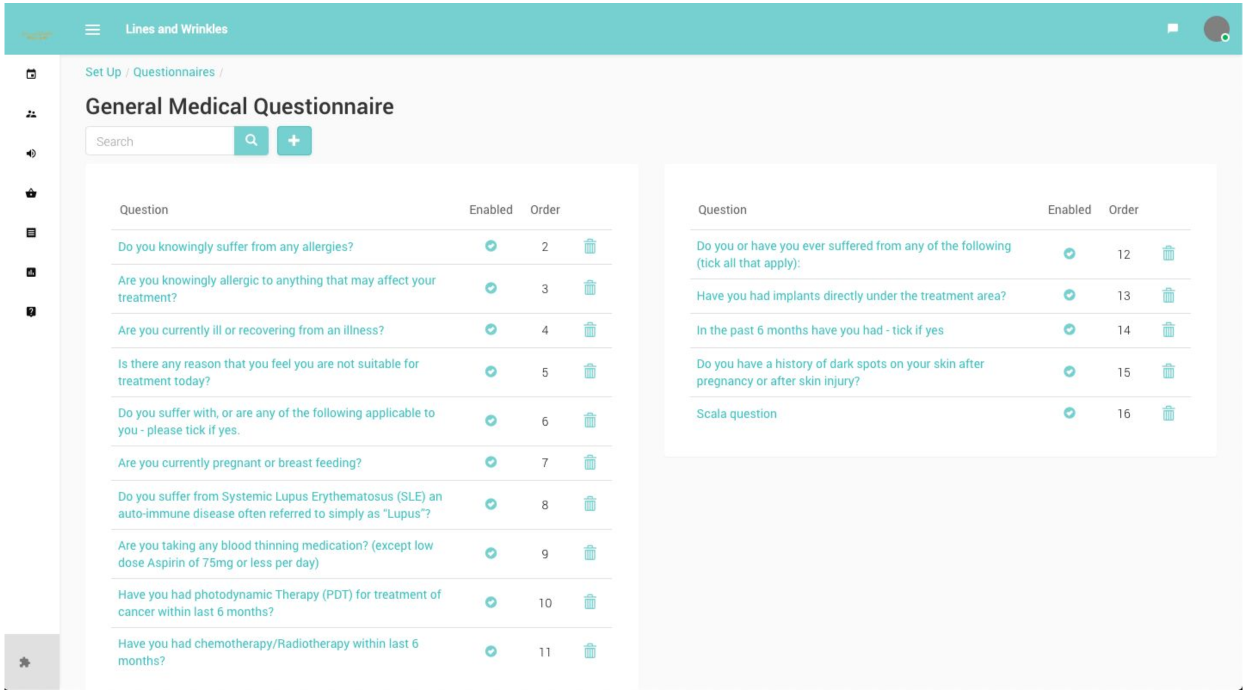
Simply press the '+' button, name the consent form and navigate to the file you wish to upload.

Unlike consent forms, 'Questionnaires' are created on the Control Centre, again under the 'Set Up ' menu.

Click the + button to add a new questionnaire, and once named and selected, use the next + button to add questions to it.

Questionnaires can be presented to the patient via Patient Mode of the Practitioner App (iPad) or sent prior to an appointment.

Marking a question as important will highlight the answer to the practitioner in the Consultation Notes section of the Practitioner App (iPad).



Questions of a Questionnaire

Quick Tips

You can enable and disable individual questions as needed when updating a questionnaire, as well as changing the question order, or add text to explain or prompt a patient.

Further Settings

There are many other settings that you can select to customise your account.

Preset Options

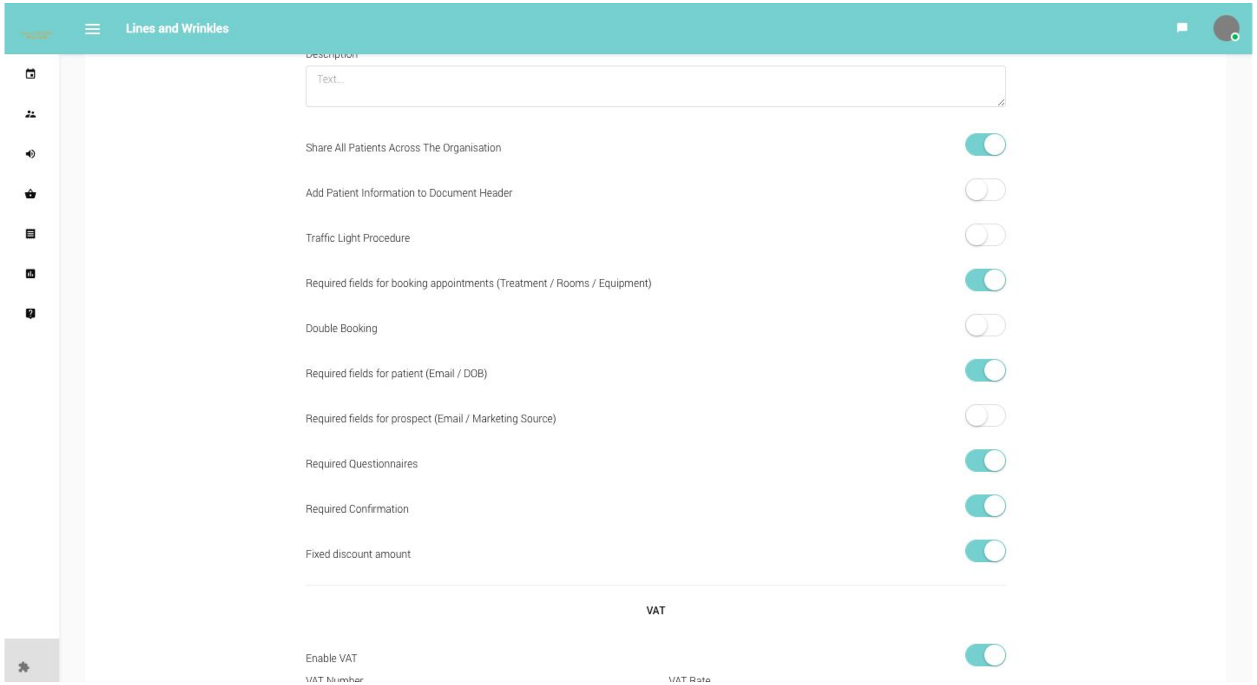
Preset Options allow for the creation of set values for options such as, 'Blocker Reasons', and 'Discount Reasons'.

These can be accessed from the 'Set Up' menu.

Clinic Options

Accessible from the Clinic 'Profile' page under the 'Settings' menu are a number of options that control clinic requirements, including allowing 'Double Booking' or enabling 'VAT'.

These can be activated via toggle switch on the Profile page.



Clinic Profile

Quick Tips

For more update information we recommend you check the Consentz Academy which can be accessed from the 'Help' menu.

Practitioner App

Accessing the App

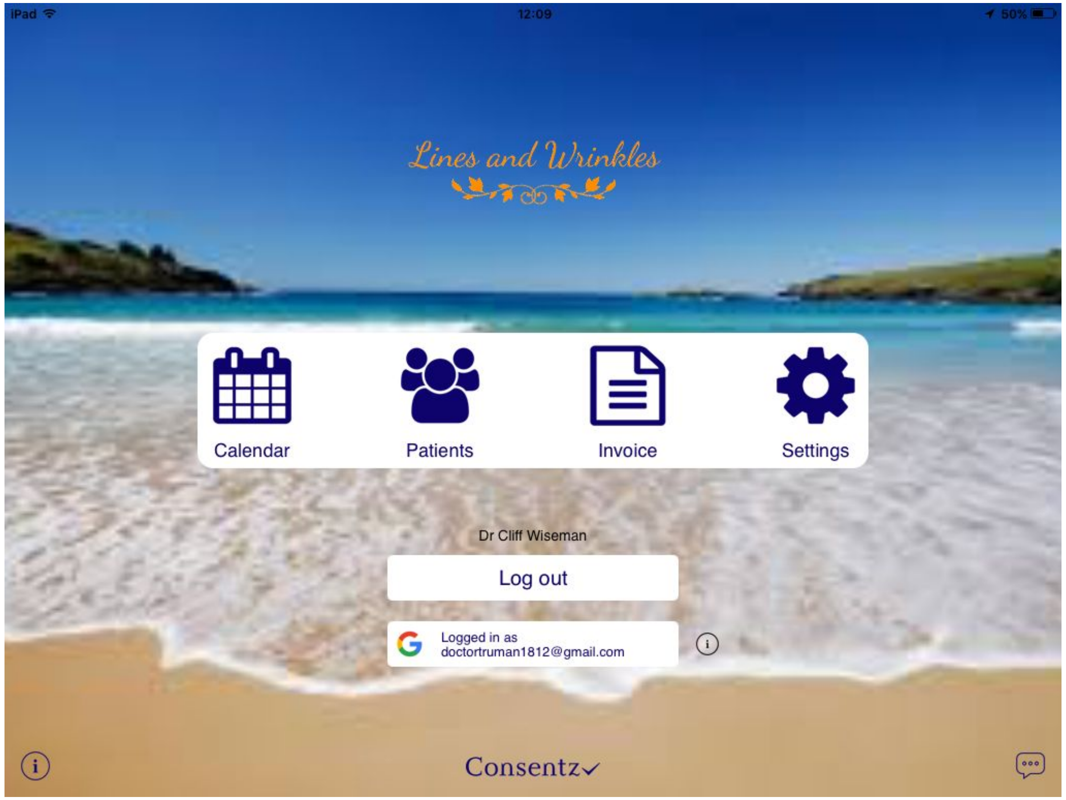
You can download & install the latest version of the Practitioner App straight to your iPad from the Apple App Store.

Search 'Consentz' in the App store.

For full access to the Practitioner Application, sign in using a 'Practitioner' role details. (See Team Members above).

Other roles can log into the Practitioner App, but will only have limited access - for instance 'Patient Mode' can be accessed using non practitioner roles, but the calendar cannot.

For more information see the 'Practitioner App' guide.



Quick Tips

There are two apps by Consentz in the App Store. Make sure you don't download the iPhone only 'Patient App' as Practitioners will not be able to access it.

FAQs

I can't select a treatment on the calendar?

Each practitioner has their own treatment list that is derived from the main Treatment list to stop the possibility of a practitioner being booked for a treatment they cannot perform.

A practitioner's individual treatment list can be found under their "Team Member" profile, which can be accessed from 'Settings' -> 'Team'

Add or remove treatments from the 'Treatment(s)' field. Only treatments present will appear in the Calendar once the practitioner has been selected.

I can't select a product for marking photos?

It is most likely that the relationship between the Treatment selected and the product expected has not been established. This can be done from the Treatment page, found under the 'Set Up' menu. Select the treatment in question and add one or more products to the 'Linked Products' section.

How do I send SMS reminder messages?

You will need to set up a Twilio account an link it to Consentz, for more information please search 'SMS' from the 'Academy' accessed via the 'Help' menu.

Do patients receive a booking confirmation?

Patients can receive a booking confirmation. This can be activated via the 'Required Confirmation' toggle on the 'Profile' page from the 'Settings' menu.

How do I block out my calendar?

You can add blockers to your calendar in the same way as adding an appointments. Select the 'Blocker' tick box and the appointment window will reduce in size.

Select the time you wish to block out and click on 'Book Appointment'. If you are unable to select a 'Blocker Reason' you will need to add to the 'Preset Options' found in the 'Set Up' menu.

I can't see the Settings / Set Up menu?

You'll need to be a (Super) Clinic Admin to see the settings and set up menu items. Practitioners, Receptionist etc. roles have more limited access and can't make amendments to settings.

I can't access the Practitioner App?

You can download the Practitioner App from the Apple App store by searching for 'Consentz'.
You'll need at least one active licence. These can be managed from the Control Centre - Settings -> Licence page.

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