Consentz

Receptionist Guide

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Logging in for the First Time

First Log In

Your Clinic Administrator will create a user for you on Consentz.

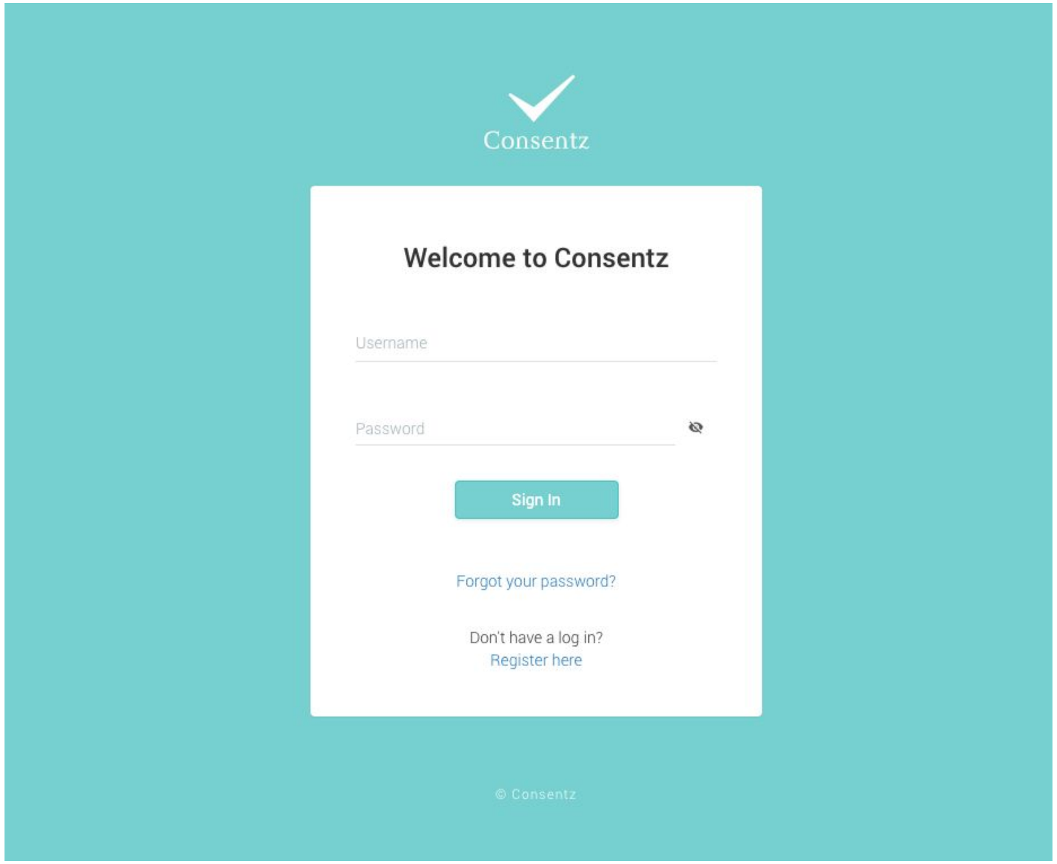
You will receive an email with a link that will allow you to set up your password. This password should not be shared with anyone else.

Once set, you can log onto Consentz using your username and password :

control.consentz.com

Or

beta.consentz.com (for August 2020)



The 'Sign In' Screen

Managing the Calendar

Calendar Basics

The calendar is located by selecting Scheduling -> Calendar

Practitioner Selection
Day / Week / Month will scale the visible calendar to the selected view. You can switch back and forth as desired.

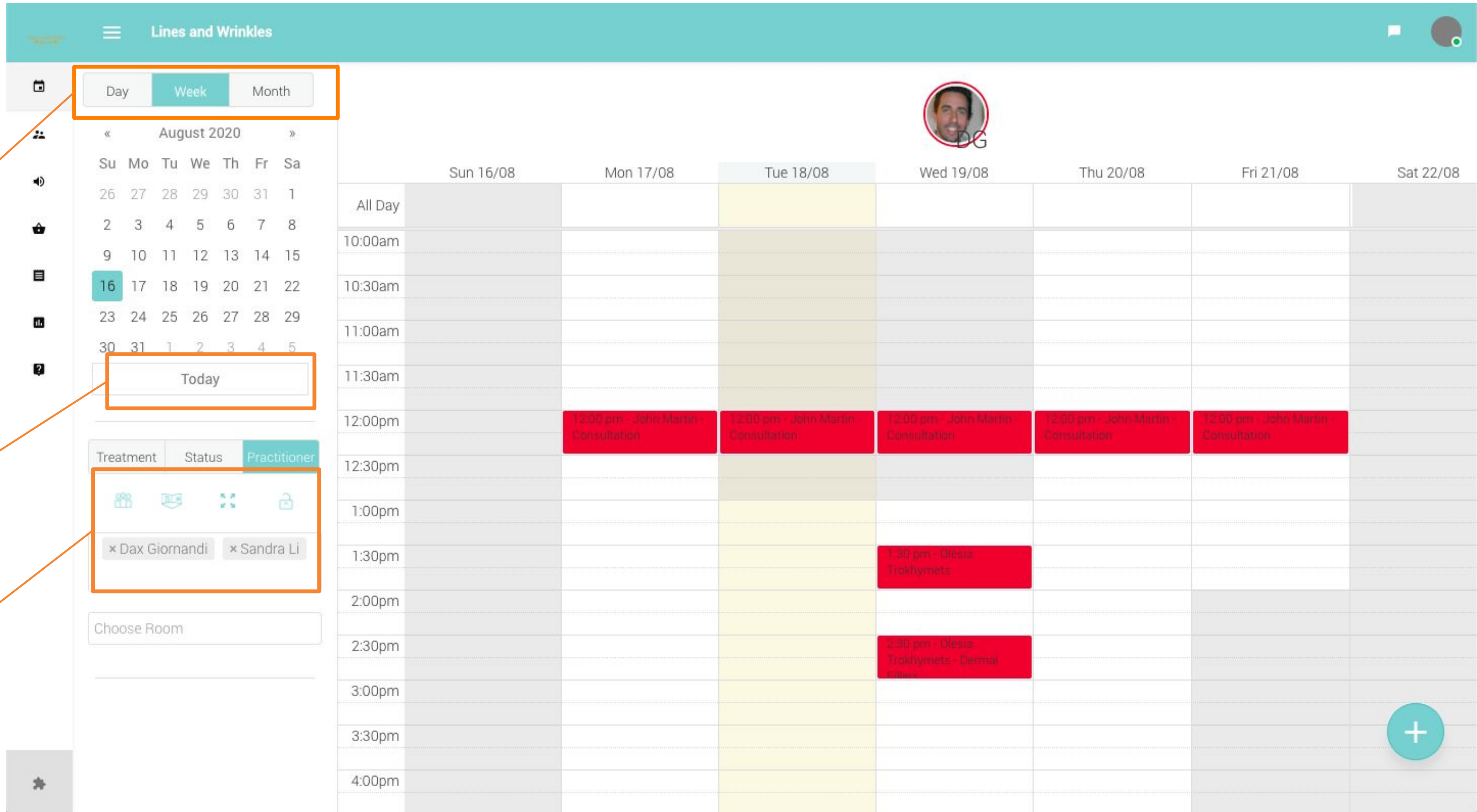
The left and right arrows will move forward and backwards in time based on the scale selected.

Today will always return to today's date.

Select Practitioners to view their individual calendars

You can select all / none practitioners by using the icon at the end of the selection box.

The padlock icon will blank the personal details of any appointments should you need to hide them, for instance if a patient needs to look at the screen.



Managing the Calendar

Creating an Appointment

Select '+' button to create an appointment, or click directly on the calendar.

A window will slide in from the right hand side of the screen.

Select a 'Practitioner'

For an existing patient, start typing their name into the 'patient' field. Matching patient records will begin to appear based on the information entered.

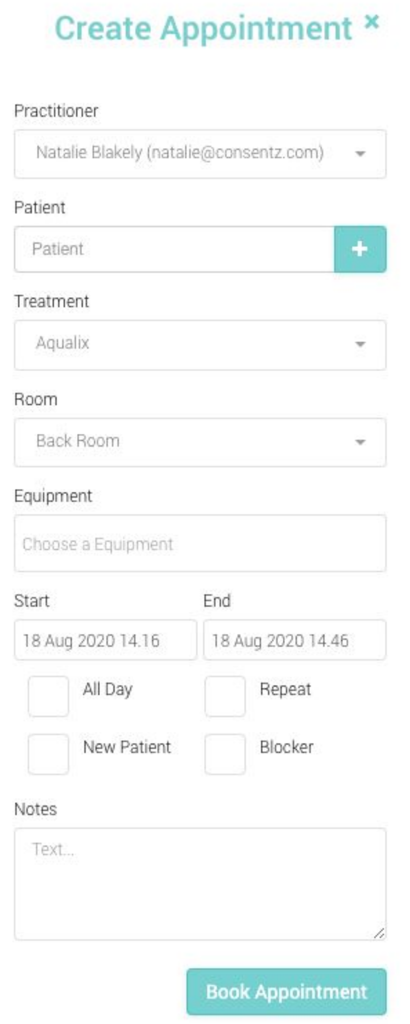
To create a new patient, click the '+' at the end of this field - the 'New Patient' window will appear.

Rooms & Equipment are optional fields

Treatment will list out available treatments as set up by the Clinic administrator.

Select a Start Time (this can also be typed in), and the End Time should change accordingly.

Add any notes, and click 'Book Appointment' to book the appointment.



Managing the Calendar

Calendar Options

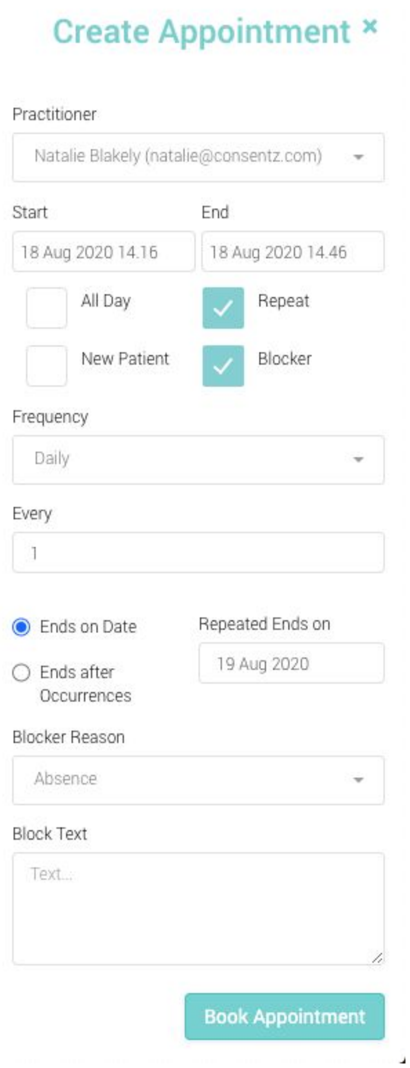
The tick box options at the bottom of the create appointment window allow for greater management options:

All Day Appointments
Creating an all day appointment will add a reminder not to the top of the selected day eg. can be used to indicate ‘holidays’.

Repeat Appointments
Select options to duplicate the appointment that you are creating. Can be used in conjunction with ‘blockers’ to define times that appointments shouldn’t be created.

New Patient
Tick to mark the appointment as for a new patient. Will be used in reporting.

Blocker
Block out periods of time where appointments shouldn’t be made - ie. ‘lunch’ or ‘ training’. Can be repeated when used in conjunction with ‘repeat appointments’.



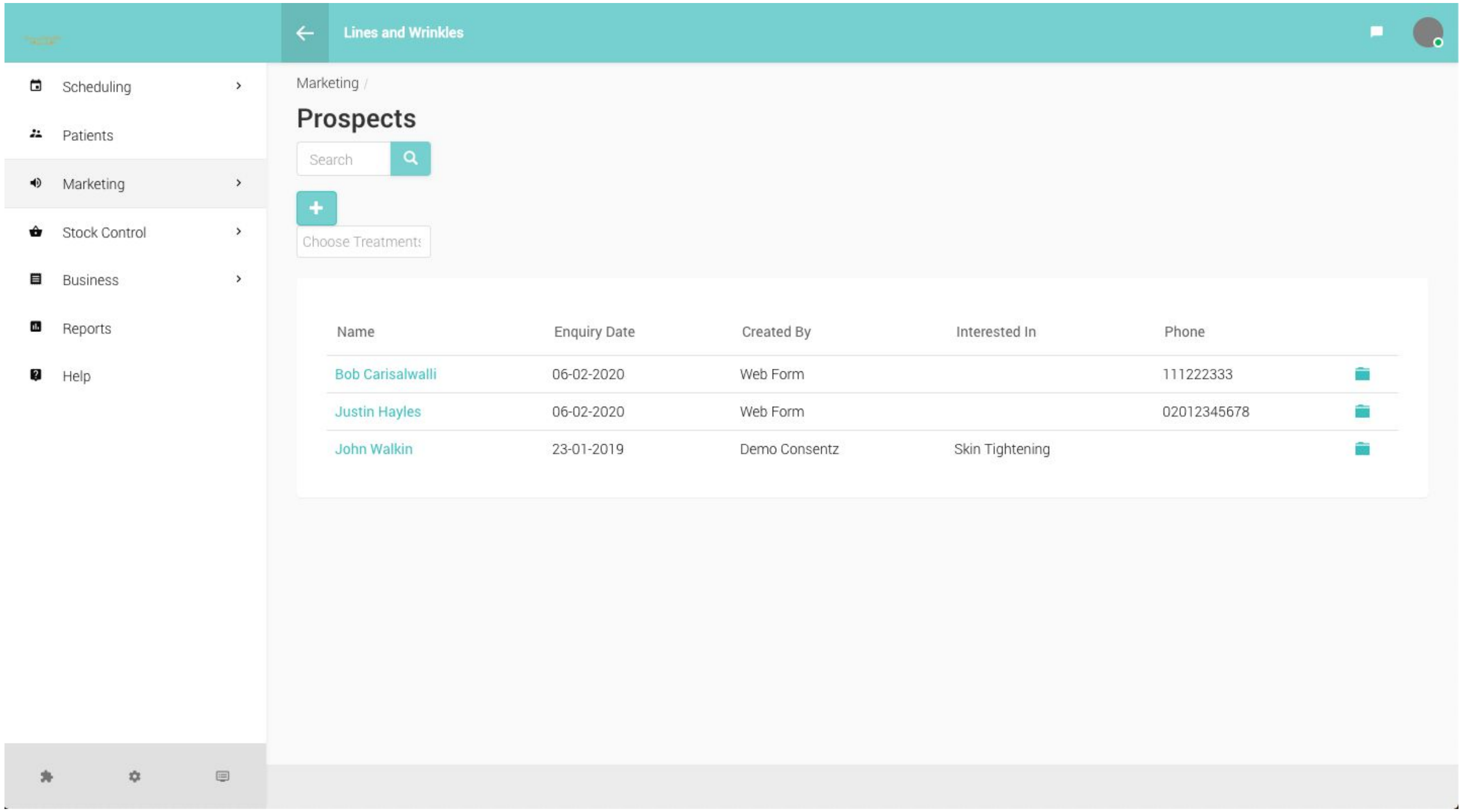
Recording New Leads

Prospects

New leads can be recorded in Marketing -> Prospects.

Add a new prospect by clicking ‘+’, or select an existing prospect but clicking on the ‘pen’ icon.

Information can be entered on the prospect page - once saved a prospect can be covered to a patient by clicking the ‘convert to patient’ button at the bottom of the page.



Accessing Patients

Patients

All patient records can be accessed from the 'Patient' tab.

New patients can be created from here as well by clicking on the '+' button - the required fields are 'First name', 'Last name' & 'Telephone no.'

Patient Record pages are listed along the top of the patient profile page.

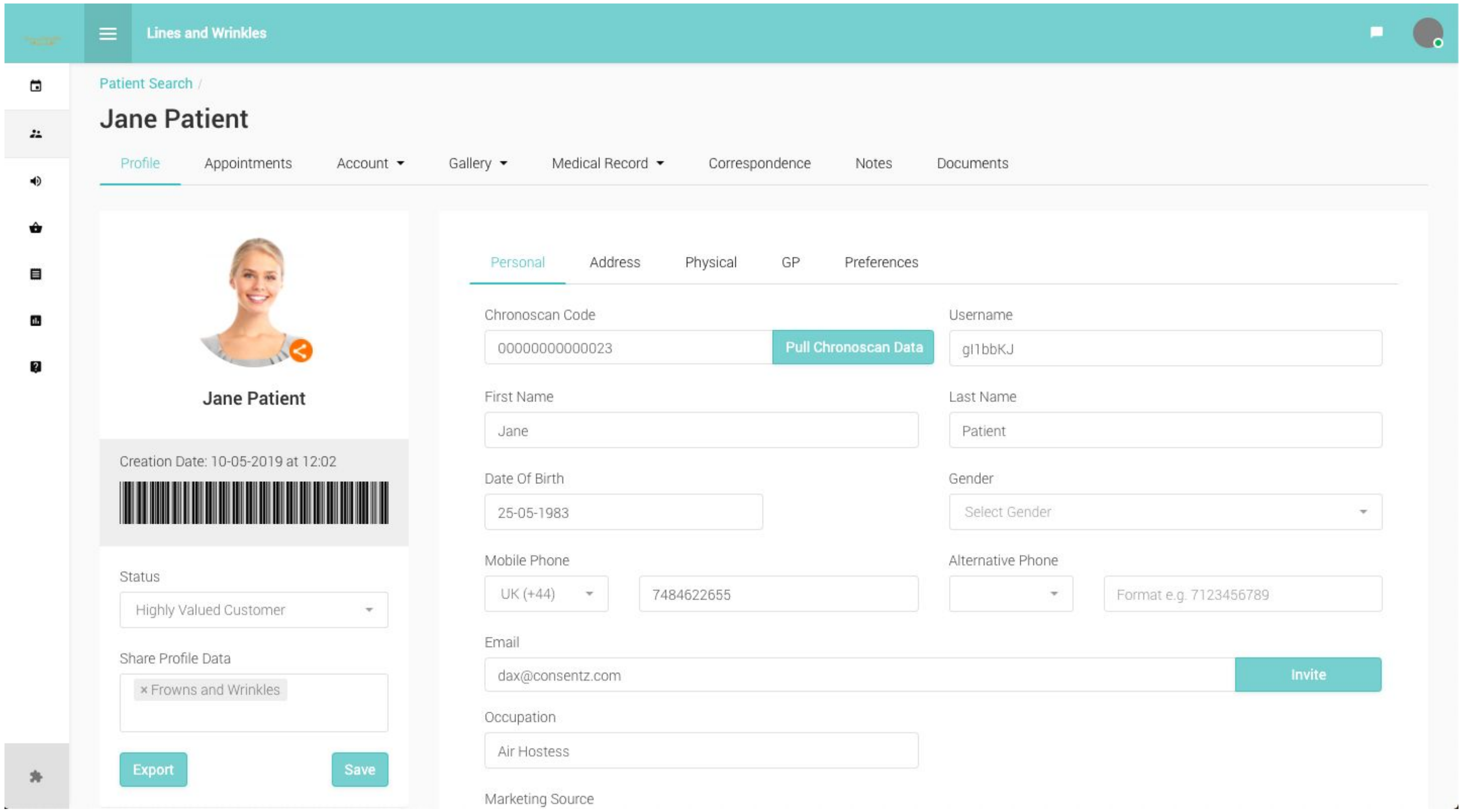
Appointments will list out all past and future appointments booked for that patient.

Account allows you to manage the finances of the chosen patient (see following page).

Gallery allows for the management of patient photos, profile picture selection, as well as uploading additional photos. .

Medical Records contains Questionnaires, Consultation Notes, Treatment Plan, Forms and Prescriptions. All this content is created on the Practitioner application.

Notes and Documents - see the following pages for more details.



Accounts & Invoicing

Accounts

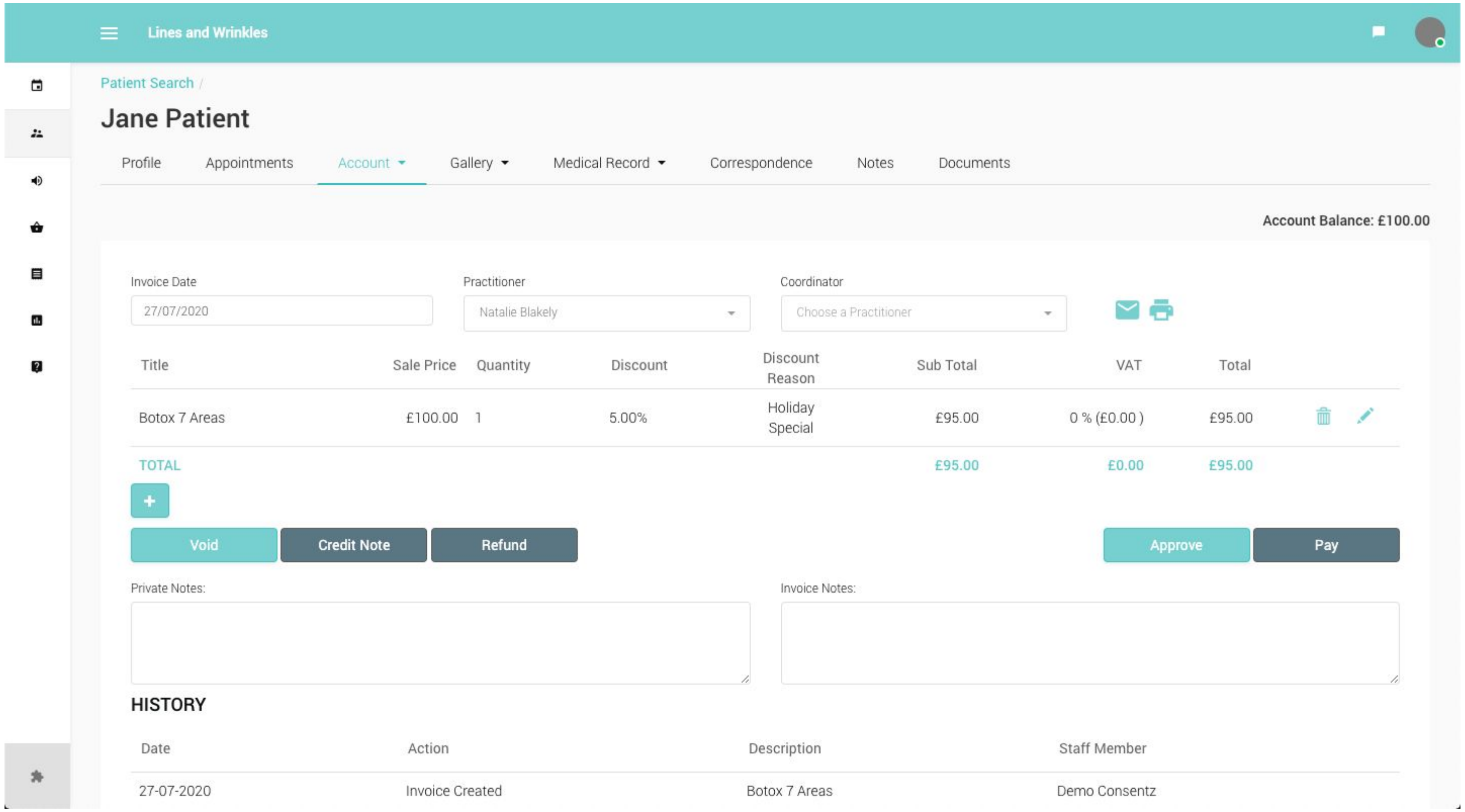
The Account tab gives you access to a patient's account - their invoices and prepayments.

To add an invoice select 'Add invoice'
Select a practitioner, followed by a Price List item, and add any 'discount' or alter the 'total'.

Click 'Save' when you are ready to create the invoice.

The next step is to click Ápprove' to bring the invoice to billing, and allow you to record payment by clicking the 'Pay' button.

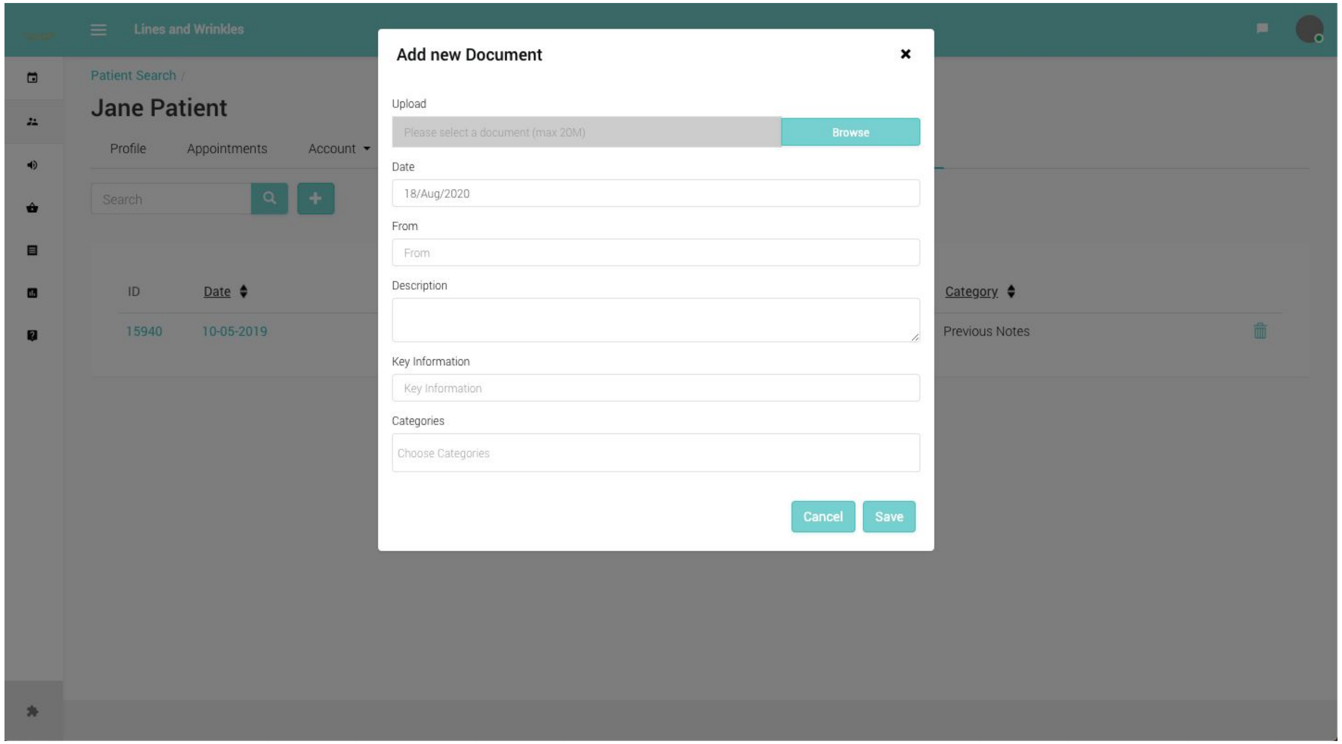
For a more detailed insight into Invoicing, search the Academy by clicking on the 'Help' menu in the Control Centre.



No More Post-it Notes

Notes

Think of the Notes menu as a place to store post-it notes. It allows you to record simple notes against the patient record - for example a phone conversation.
These will be shared with the Practitioner and accessible on the Practitioner application.



The Add a new Document upload screen

Documents

The Document menu facilitates the long term recording of, for example, blood test results or previous paper notes.

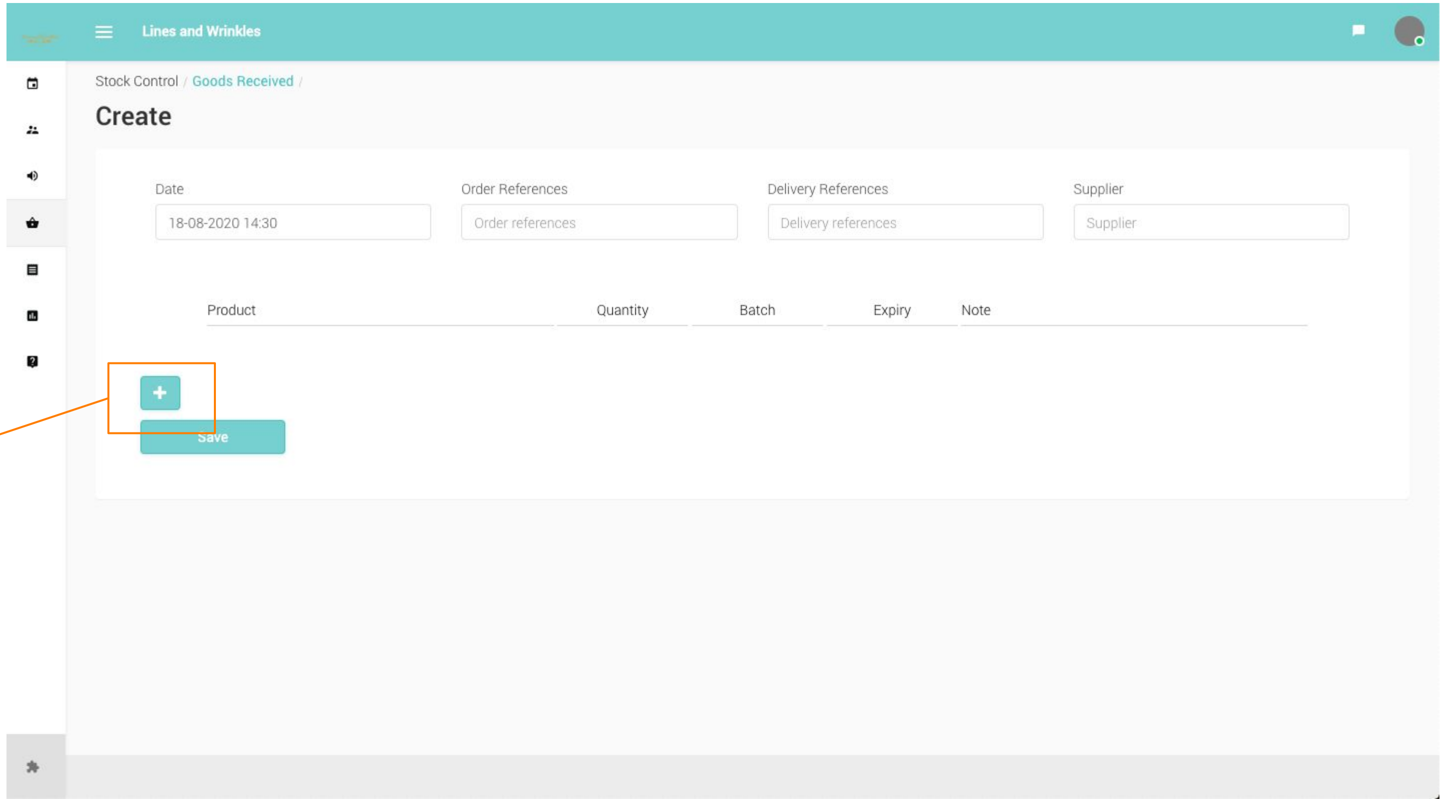
Once scanned, they can be attached to the patient from this menu, by uploading any .pdf or .jpg file.

At a glance information can be record in the 'key information' field.

Goods Received Notices

Adding Batch & Stock

To assign Stock and Batch numbers, use the 'Goods Received' menu.
This creates a digital receipt note of products arriving. 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 dates to.

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

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

Price List Items

Price List

In order to create invoices, you first need to create ‘Price List’ items to add to those invoices.

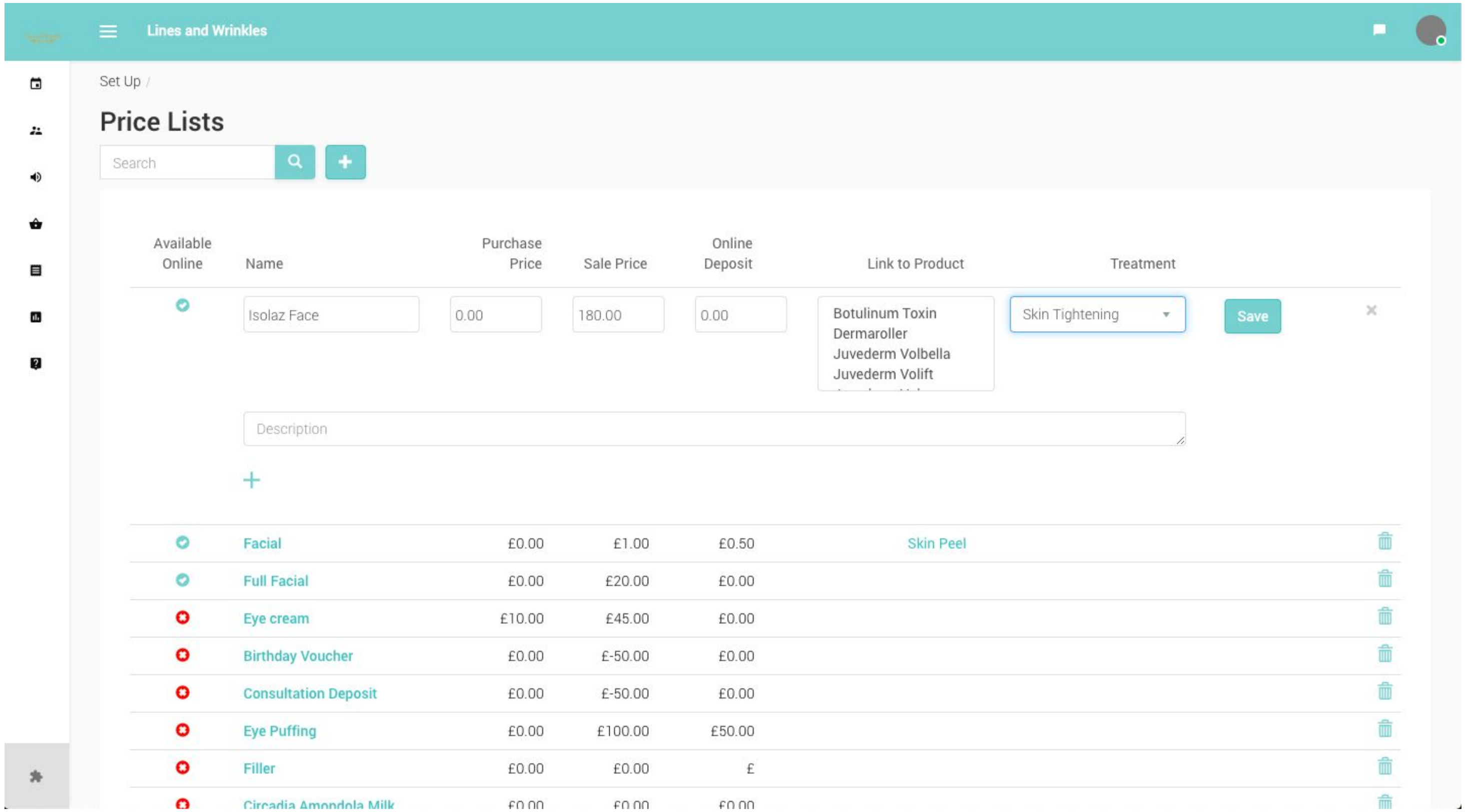
A Price List item is any product or service you would want to display on an invoice and assign a price to.

‘Price List’ can be found under the ‘Set Up’ Menu, at the bottom of the menu drawer. Select ‘+’ to add a Price List item.

Simply name the Price List item and assign a Sale Price. This price will appear on the invoice.

If you wish to reduce the stock count of a Product each time your invoice it, add a product to the Price List item.

Linking to a Treatment is currently only used to organise reporting.



Consent Forms & Questionnaires

Clinic Library

Consent forms can be added using the ‘Set Up’ menu.

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

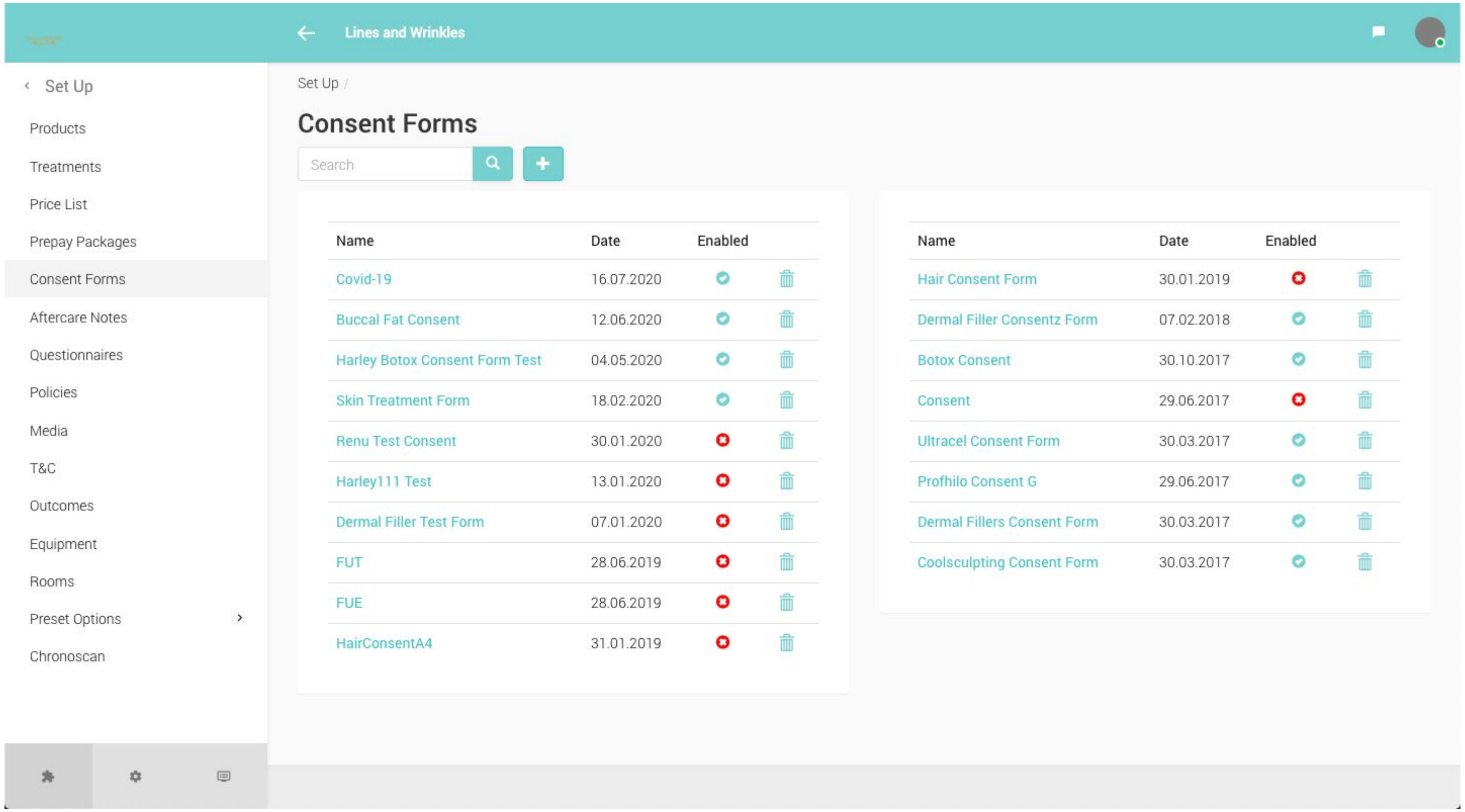
Questionnaires are created on the Control Centre. Click the + button to add a new questionnaire, and once named and selected, use the next + button to add questions to it.

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

There is no limit to questionnaires or questions within a questionnaire.

Questionnaires can be presented to the patient via Patient Mode of the Practitioner App (iPad).

Both Questionnaires and Consent Forms can be sent in advance of the appointment using Pre - Appointment forms (see the Academy for more info).



Entering Patient Mode

The Practitioner App

The Practitioner Application on the iPad has a special mode that allows patients to update their records, answer questionnaires and watch media.

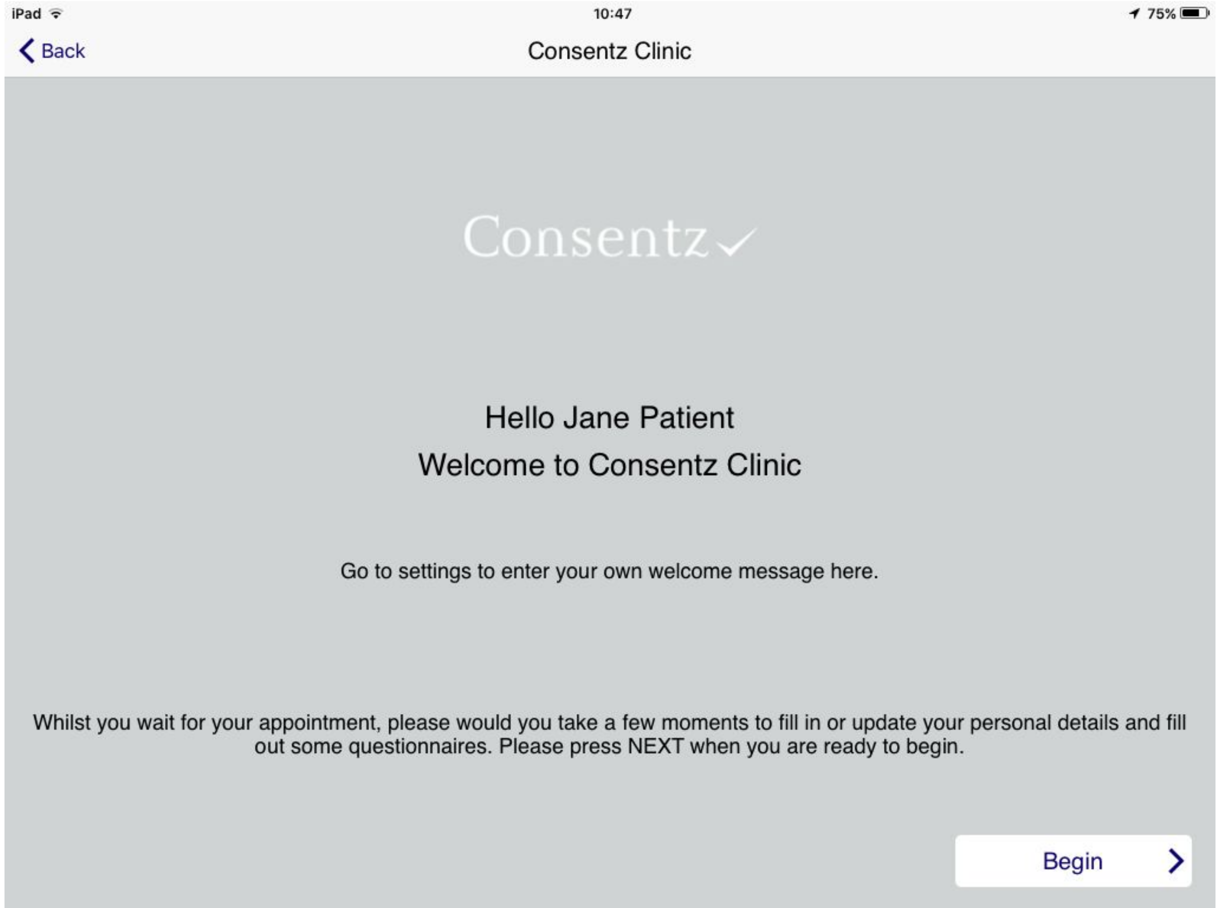
As a receptionist role, you can active patient mode by logging into the Practitioner App with your credentials.

Only two options on the main menu will be highlighted.

Select ‘Patients’ and search for the patient. Once found, tap the ‘patient mode’ button on the end of their row.

A Questionnaire Chooser window will appear. Tick the questionnaires you want the patient to answer, tap ‘Done’ and then you can hand the ipad to the patient to complete Patient Mode.

Patient Mode is locked by PIN, which can be supplied by your Clinic Admin.



What the Patient Will See - The intro screen after the questionnaires have been selected

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