

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.

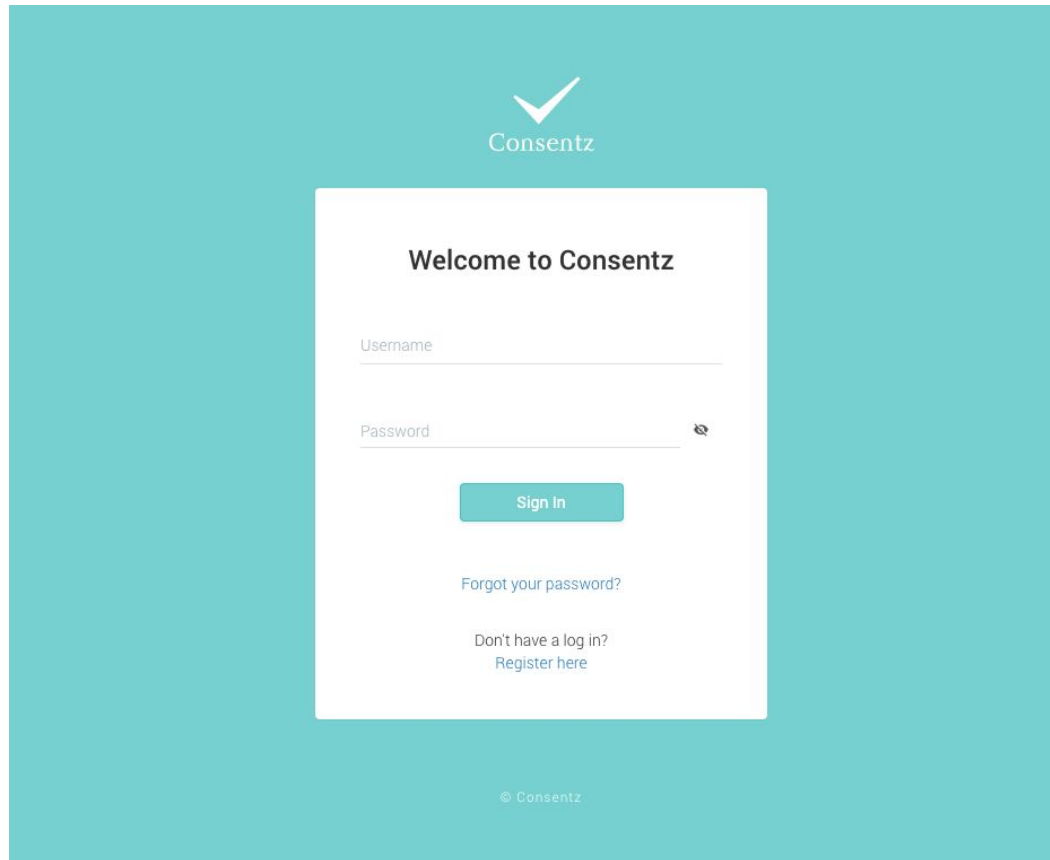
You will receive an email with a link that will allow you to set up your password. This password should not be shared with anyone else.

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.

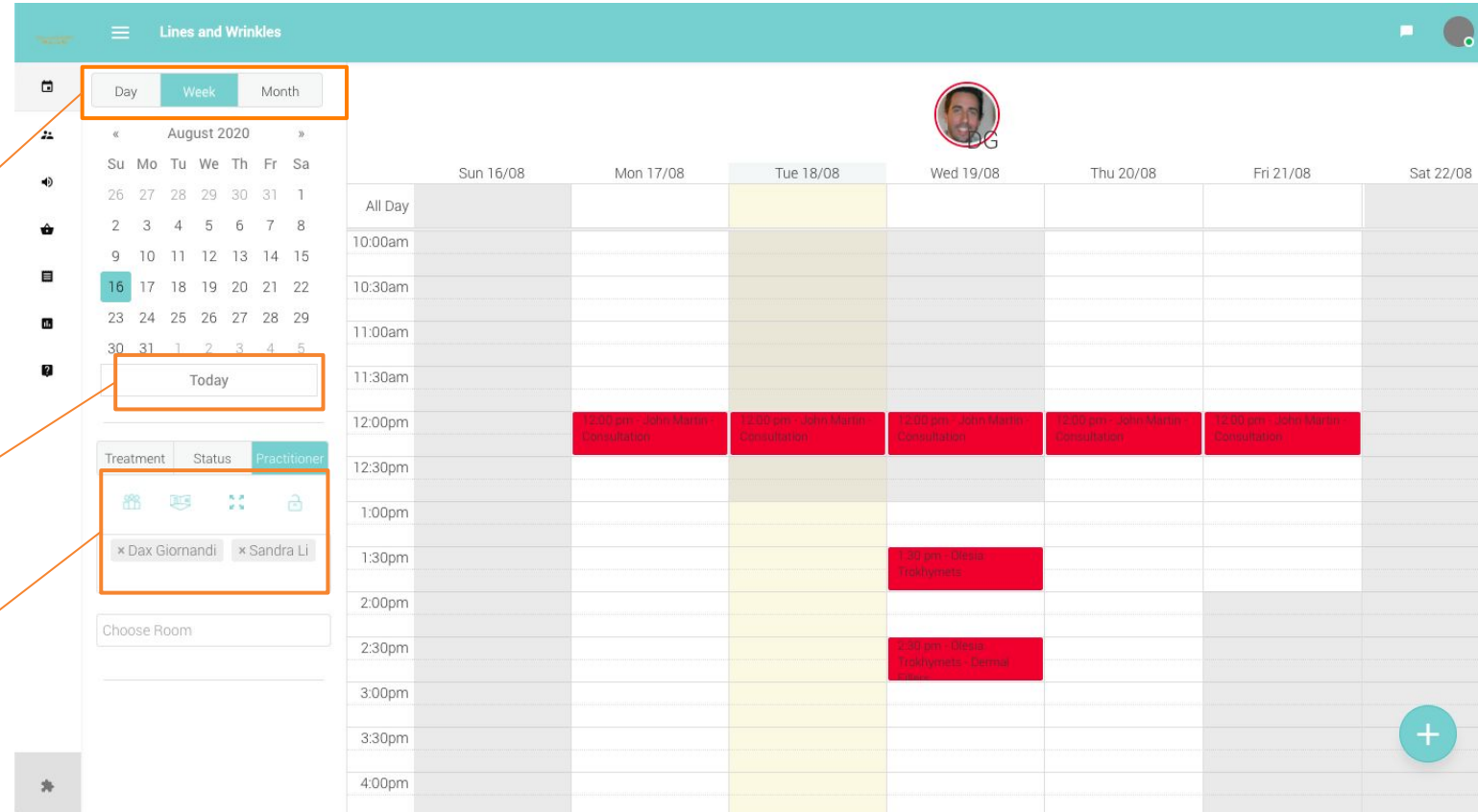
The left and right arrows will move forward and backwards in time based on the scale selected.

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.

Create Appointment ✕

Practitioner
Natalie Blakely (natalie@consentz.com) ▼

Patient
Patient +

Treatment
Aqualix ▼

Room
Back Room ▼

Equipment
Choose a Equipment

Start End
18 Aug 2020 14.16 18 Aug 2020 14.46

☐ All Day ☐ Repeat
☐ New Patient ☐ Blocker

Notes
Text...

Book 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'.

Create Appointment ✕

Practitioner
Natalie Blakely (natalie@consentz.com) ▼

Start
18 Aug 2020 14:16

End
18 Aug 2020 14:46

☐ All Day ☒ Repeat

☐ New Patient ☒ Blocker

Frequency
Daily ▼

Every
1

☒ Ends on Date ☐ Repeated Ends on
19 Aug 2020

Blocker Reason
Absence ▼

Block Text
Text...

Book Appointment

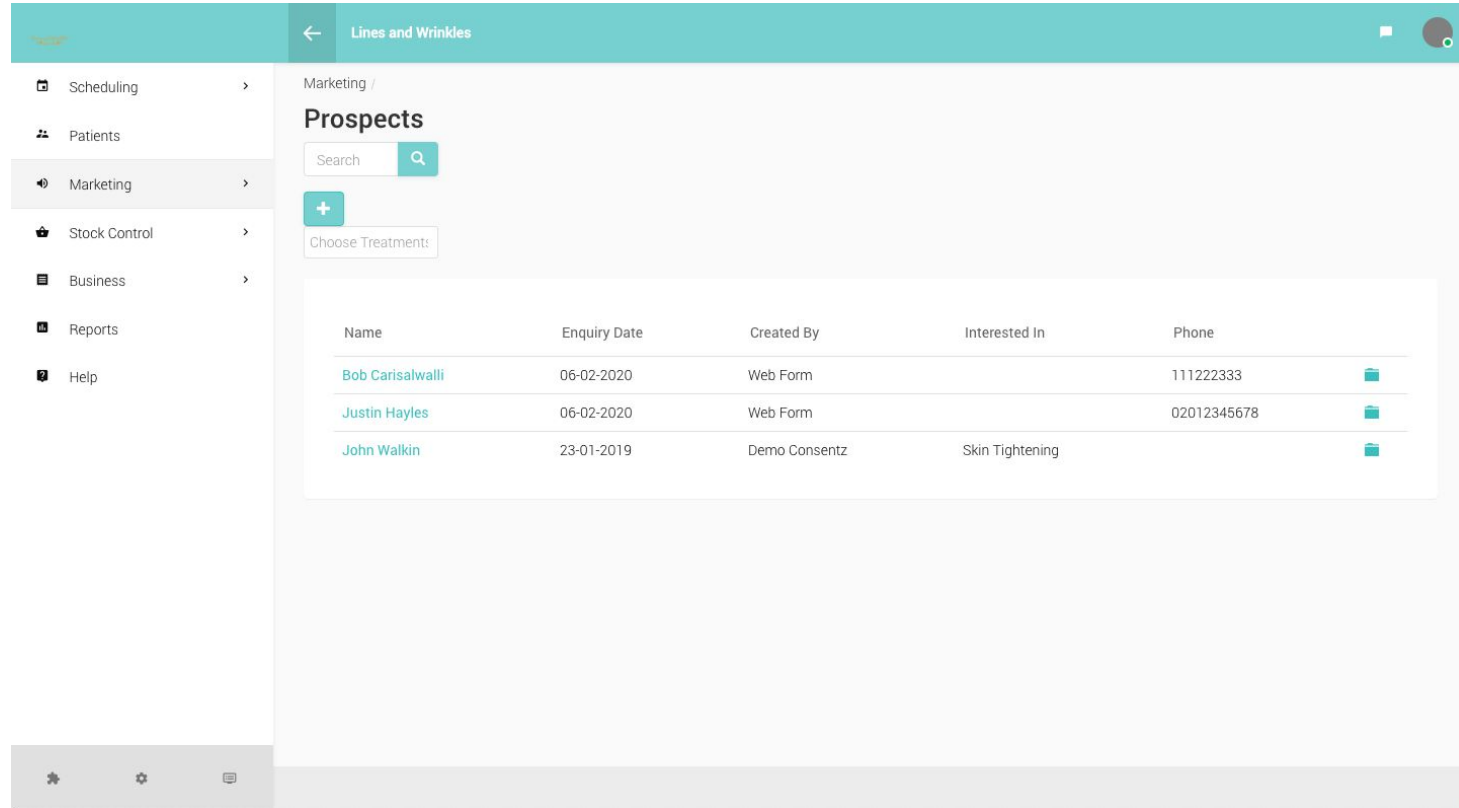
Recording New Leads

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.

The screenshot shows the 'Prospects' page in the Consentz application. On the left is a sidebar menu with icons and labels for 'Scheduling', 'Patients', 'Marketing' (which is highlighted), 'Stock Control', 'Business', 'Reports', and 'Help'. The main content area has a teal header bar with a back arrow and the text 'Lines and Wrinkles'. Below this, the page title 'Prospects' is displayed. There is a search bar with a magnifying glass icon and a green '+' button. Below the '+' button is a text input field labeled 'Choose Treatment:'. A table lists three prospects with columns for Name, Enquiry Date, Created By, Interested In, and Phone. Each row has a small teal icon with a white 'p' at the end. At the bottom of the page, there is a grey bar with three icons: a puzzle piece, a gear, and a speech bubble.

Name	Enquiry Date	Created By	Interested In	Phone
Bob Carisalwalli	06-02-2020	Web Form		111222333
Justin Hayles	06-02-2020	Web Form		02012345678
John Walkin	23-01-2019	Demo Consentz	Skin Tightening	

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.

The screenshot shows the 'Jane Patient' profile page in the Consentz system. The page is divided into several sections:

- Header:** 'Lines and Wrinkles' with a menu icon and a user profile icon.
- Navigation:** 'Patient Search / Jane Patient' with tabs for 'Profile', 'Appointments', 'Account', 'Gallery', 'Medical Record', 'Correspondence', 'Notes', and 'Documents'.
- Profile Section:** Includes a profile picture of Jane Patient, her name, creation date (10-05-2019 at 12:02), a barcode, and a status dropdown set to 'Highly Valued Customer'.
- Personal Information Section:** Includes fields for Chronoscan Code (00000000000023), Username (gl1bbKJ), First Name (Jane), Last Name (Patient), Date Of Birth (25-05-1983), Gender (Select Gender), Mobile Phone (UK (+44) 7484622655), Alternative Phone, Email (dax@consentz.com), Occupation (Air Hostess), and Marketing Source.
- Buttons:** 'Pull Chronoscan Data', 'Export', 'Save', and 'Invite'.

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 'Approve' 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.

The screenshot shows the 'Jane Patient' account page in the Consentz system. The top navigation bar is teal with a menu icon and the text 'Lines and Wrinkles'. Below this, a sidebar contains icons for various functions. The main content area has a teal header with 'Patient Search / Jane Patient'. Below the header, there are tabs for 'Profile', 'Appointments', 'Account' (selected), 'Gallery', 'Medical Record', 'Correspondence', 'Notes', and 'Documents'. The 'Account' tab displays the 'Account Balance: £100.00'. The main section contains an 'Invoice Date' field (27/07/2020), a 'Practitioner' dropdown (Natalie Blakely), and a 'Coordinator' dropdown (Choose a Practitioner). Below these are icons for email and print. A table lists the invoice items:

Title	Sale Price	Quantity	Discount	Discount Reason	Sub Total	VAT	Total
Botox 7 Areas	£100.00	1	5.00%	Holiday Special	£95.00	0 % (£0.00)	£95.00
TOTAL					£95.00	£0.00	£95.00

Below the table are buttons for '+', 'Void', 'Credit Note', 'Refund', 'Approve', and 'Pay'. There are also fields for 'Private Notes' and 'Invoice Notes'. At the bottom, a 'HISTORY' section shows a table with columns for Date, Action, Description, and Staff Member:

Date	Action	Description	Staff Member
27-07-2020	Invoice Created	Botox 7 Areas	Demo Consentz

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.

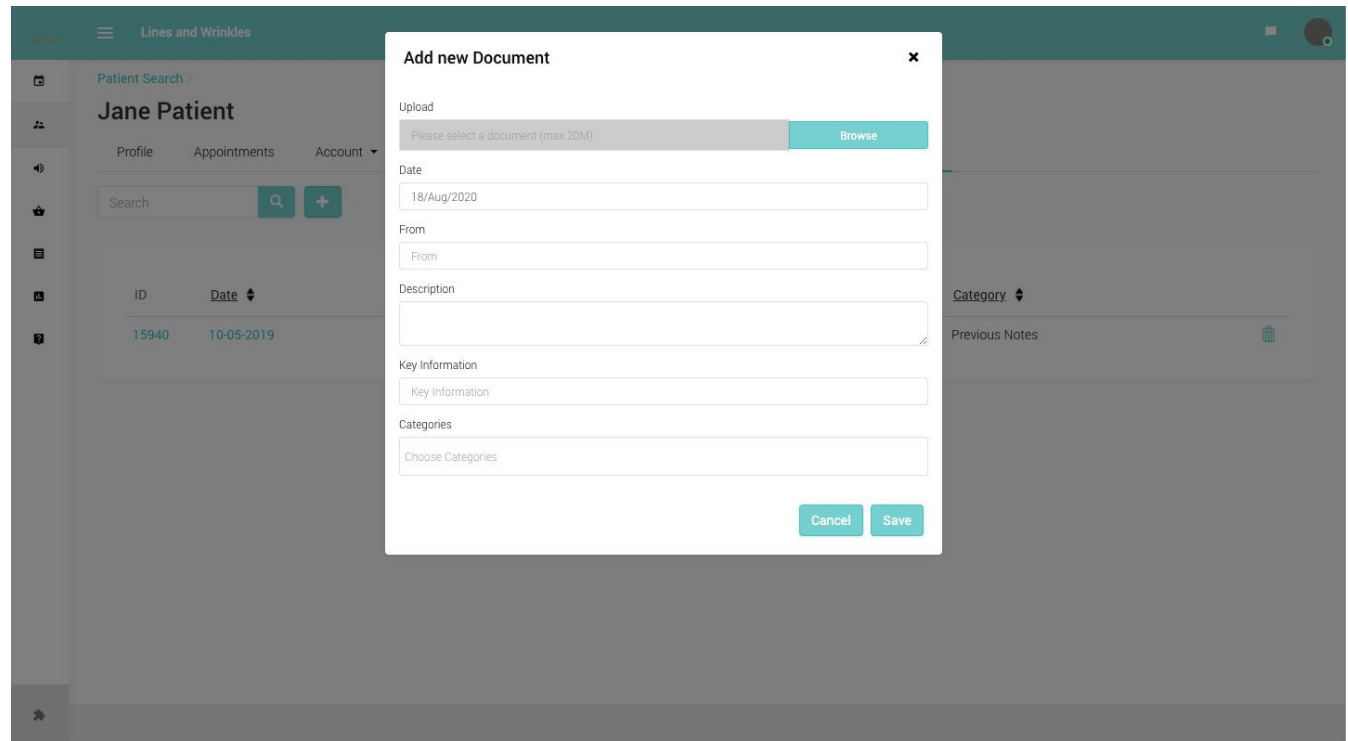
These will be shared with the Practitioner and accessible on the Practitioner application.

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.

The screenshot shows the 'Add new Document' modal window in the Consentz application. The background is a blurred view of the 'Jane Patient' profile page, which includes tabs for 'Profile', 'Appointments', and 'Account'. The modal window has a title bar with a close button (X). It contains several input fields: 'Upload' with a 'Browse' button, 'Date' (pre-filled with '18/Aug/2020'), 'From', 'Description', 'Key Information', and 'Categories' (with a 'Choose Categories' button). At the bottom right of the modal are 'Cancel' and 'Save' buttons. The background page also shows a table with columns 'ID' and 'Date', and a 'Previous Notes' section with a trash icon.

The Add a new Document upload screen

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.

The screenshot shows the 'Create' form for a 'Goods Received Note' in the Consentz system. The form is titled 'Create' and is part of the 'Stock Control / Goods Received' section. It features a sidebar on the left with a 'Truck' icon highlighted. The main form area contains several input fields: 'Date' (18-08-2020 14:30), 'Order References' (Order references), 'Delivery References' (Delivery references), and 'Supplier' (Supplier). Below these fields is a table with columns for 'Product', 'Quantity', 'Batch', 'Expiry', and 'Note'. A '+' button is located at the end of the first row in the table, and a 'save' button is at the bottom right. An orange arrow points from the text 'Add' in the instructions to the '+' button.

Price List Items

Price List

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

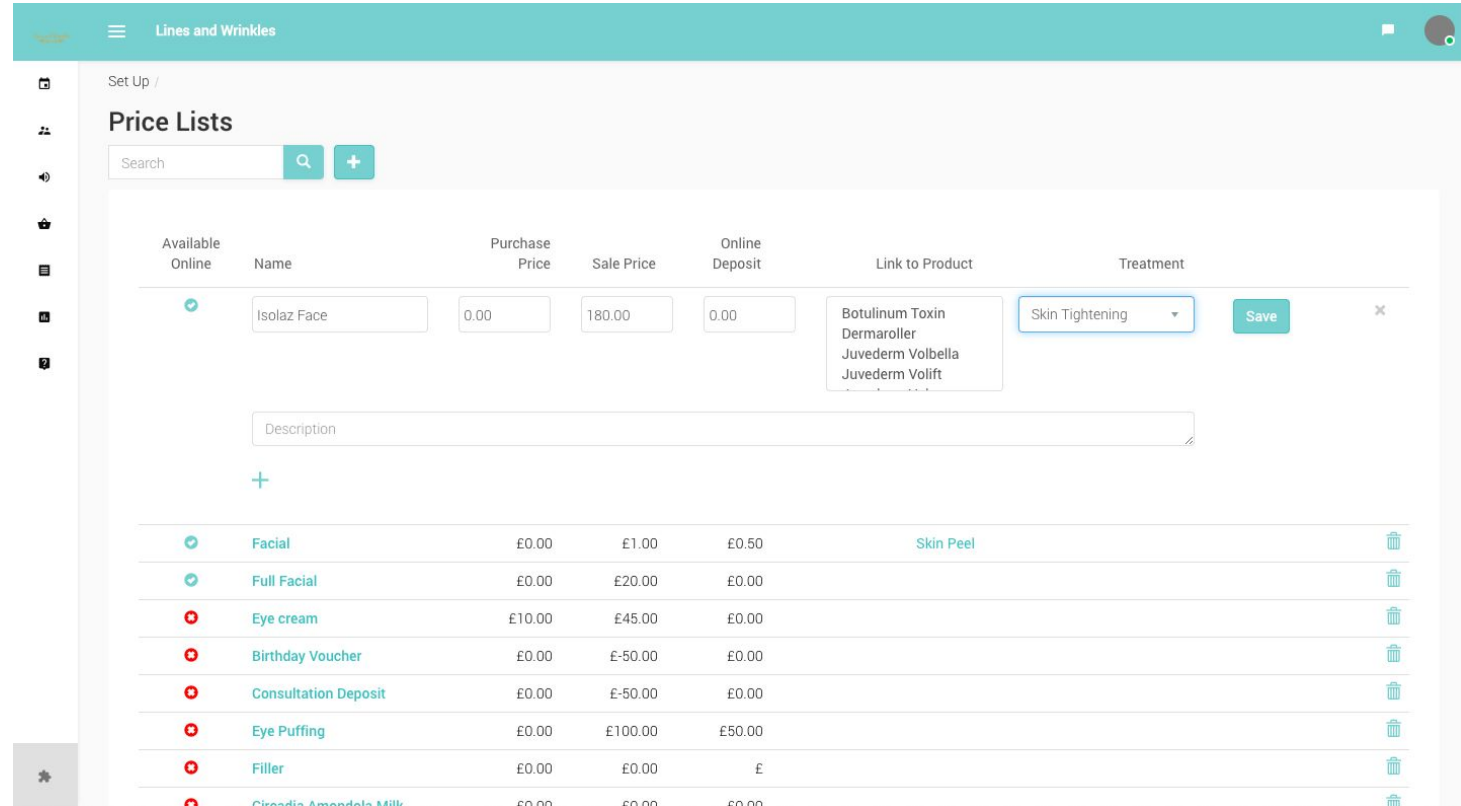
A Price List item is any product or service you would want to display on an invoice and assign a price to.

'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.



The screenshot displays the 'Price Lists' section within the 'Set Up' menu. It includes a search bar and a '+ Add' button. Below is a form for creating a new item, followed by a table of existing items.

Available Online	Name	Purchase Price	Sale Price	Online Deposit	Link to Product	Treatment
☒	Isolaz Face	0.00	180.00	0.00	Botulinum Toxin Dermaroller Juvederm Volbella Juvederm Voluma	Skin Tightening
☒	Facial	£0.00	£1.00	£0.50	Skin Peel	
☒	Full Facial	£0.00	£20.00	£0.00		
☒	Eye cream	£10.00	£45.00	£0.00		
☒	Birthday Voucher	£0.00	£-50.00	£0.00		
☒	Consultation Deposit	£0.00	£-50.00	£0.00		
☒	Eye Puffing	£0.00	£100.00	£50.00		
☒	Filler	£0.00	£0.00	£		
☒	Circadia Amondala Milk	£0.00	£0.00	£0.00		

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).

The screenshot shows the 'Lines and Wrinkles' section of the Consentz interface. On the left is a sidebar menu with options: Set Up, Products, Treatments, Price List, Prepay Packages, Consent Forms (highlighted), Aftercare Notes, Questionnaires, Policies, Media, T&C, Outcomes, Equipment, Rooms, Preset Options, and Chronoscan. The main area is titled 'Set Up / Consent Forms' and contains a search bar and a '+' button. Below this is a table of consent forms.

Name	Date	Enabled	
Covid-19	16.07.2020	✓	🗑️
Buccal Fat Consent	12.06.2020	✓	🗑️
Harley Botox Consent Form Test	04.05.2020	✓	🗑️
Skin Treatment Form	18.02.2020	✓	🗑️
Renu Test Consent	30.01.2020	✗	🗑️
Harley111 Test	13.01.2020	✗	🗑️
Dermal Filler Test Form	07.01.2020	✗	🗑️
FUT	28.06.2019	✗	🗑️
FUE	28.06.2019	✗	🗑️
HairConsentA4	31.01.2019	✗	🗑️

On the right side of the screenshot, there is another table showing a list of consent forms:

Name	Date	Enabled	
Hair Consent Form	30.01.2019	✗	🗑️
Dermal Filler Consentz Form	07.02.2018	✓	🗑️
Botox Consent	30.10.2017	✓	🗑️
Consent	29.06.2017	✗	🗑️
Ultracel Consent Form	30.03.2017	✓	🗑️
Profilo Consent G	29.06.2017	✓	🗑️
Dermal Fillers Consent Form	30.03.2017	✓	🗑️
Coolsculpting Consent Form	30.03.2017	✓	🗑️

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.

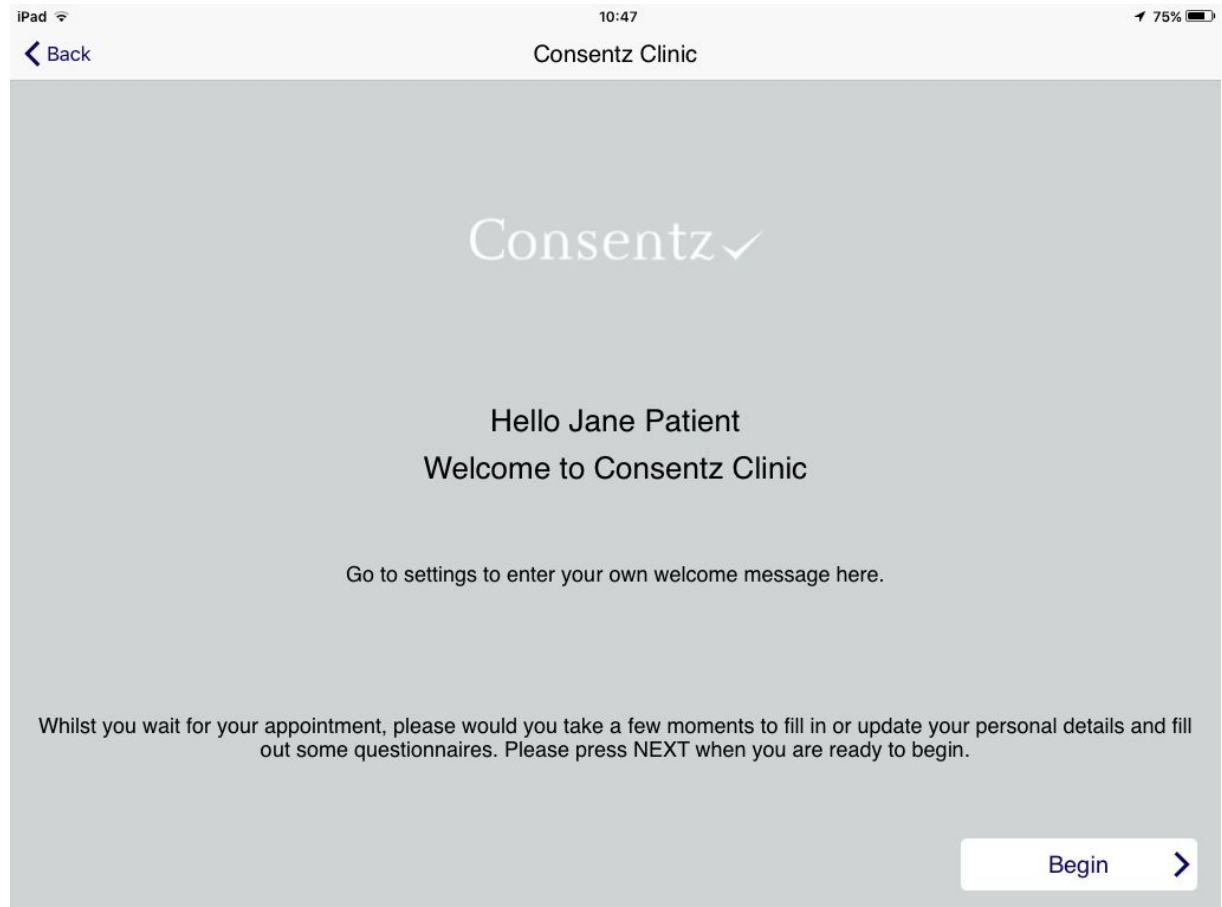
As a receptionist role, you can active patient mode by logging into the Practitioner App with your credentials.

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

Address

48 Church Street, Weybridge, Surrey, KT13 8DS

Email

contact@consentz.com

Telephone

Sales: +44 (0)1932 212 009

Support: +44 (0)1932 481 083

Main: +44 (0)1932 481 081