Systems for Dentists

Version 6

Version	2.0
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Disclaimer:

The information provided within this document is to aid in the use of the Systems for Dentists Limited Dental Software version 6 (SFD v6). No advice or guidance in relation to the provisioning of dentistry is intended implicitly or explicitly. Any queries pertaining to the claiming of treatment under NHS or other social schemes should be raised with the appropriate commissioning or regulatory bodies. Systems for Dentists Limited cannot provide and does not intend to provide instruction on these matters.

Where this manual or the dental software makes suggestions, this is intended to assist the qualified dental professionals in the documentation of their work; clinical judgment is always that of the dental professional and not the responsibility of the dental software.

For more information regarding any warranties and assurances associated with SFD v6 please refer to the EULA which is available within the software or by written request.

Contents

About Systems for Dentists 9

Introduction 10

Purpose 10

System Requirements 10

Updates 10

What's New 11

General Use 12

Starting the program 12

Logging in – Logging Off – Change password 12

Home Screen 13

User messages 15

Patients 18

Creating a new patient 18

Opening patient records 32

Switching between patients 33

Editing a patient record 33

Patient Home Screen 35

Patient Appointment History 36

Periodontal Examinations 38

Treatment 44

Creating a new form 46

Adding Items to the base chart 49

Adding an examination to a treatment form 59

Adding additional visits (appointments) to a treatment form 59

Adding additional visits to the treatment clipboard 61

Adding treatment items to a form (By tooth) 62

Adding treatment items to a form (By code) 65

Adding an alternative plan to a treatment form 68

Generating estimates 70

Transmitting an NHS form 72

Adding guaranteed items to an NHS treatment form 74

Clinical Notes 76

Patient Medical 80
Popup notes and memo 83
Patient Accounts 87
Deleting Payments 91
Charges 91
Credit Notes 93
Refunds 96
Write offs 98
Sundry sales 99
Invoice 101
Statements 104
Memo 106
Images 107
Correspondence 116
Correspondence 120
Pathology 123
Intraoral 123
Extraoral 123
Links to Third Party Software 128
Options 128
BPE 128
Clipboard 129
Injections 130
Oral Health Score 131
Recalls 132
Prescription 134
Assessment 136
Implants 138
Print Details 139
Add patient to appointment clipboard 140
Appointment Book 141
Icon explanations 141
Lookup 141
Cancellation 143
Book 152

Book family appointment 154
Change visible books 157
Text Appointment 159
Vacant 160
Calendar 164
Overview 165
Selecting different performers to view 166
Booking appointments 167
Booking patients on the appointment clipboard 168
Changing Appointments 170
Same date 170
Different date (Hold appointment) 172
Extending/shortening appointments 175
Properties 176
Cancelling Appointments 177
Single appointments 177
Marking patients as… 179
Arrived 179
In Surgery 181
Departed 181
Waiting list (gingerbread men) 182
SMS Reminders 183
Appointment Book Options 186
Show cancelled appointments 187
Show balance flag 187
Show telephone numbers 187
Show patient ID 187
Show Duration 188
Show email address 188
Show points 188
Split View 192
Both sidebars 192
Block cancellation 193
Print 195
Print (Full) 195

Print (Short) 197
Print (Wide) 198
Tasks 199
Create new 199
Edit existing 202
Email 203
Overview 203
Selecting user 203
Options 204
Dashboard 204
Luminosity 206
Contacts 207
Stock Usage 207
Petty Cash 208
Transmissions 209
Library 211
Human Resources 211
Laboratory Work 212
Waiting List 213
Day List 214
Payment List 215
Search for a treatment form 215
Style 216
Reports 217
Introduction 217
Appointment 217
Reminders 217
Report 220
Patient 221
Patients 221
Balances 235
Accounts 237
Recalls 239
New Patients 241
Payment & Allocation 242

Demographic 245
Postcode 247
Treatment 250
Forms 250
Items 252
For Others 255
Referrals 257
Referrals In 257
Referrals Out 257
NHS 259
UDA 259
UDA Summary 263
Schedule 270
Miscellaneous 273
Stock 273
Sundry 274
SMS 275
Treatment Completion Screens 276
Patient Assessment Screens 278
Logon History 279
Documents 280
Accounts (Basic) 283
Nominal 283
Accounts 283
Tills 286
Bank 287
Accounts 287
Payment 288
Receipt 289
Transfer 290
Petty Cash 290
Products 291
Categories 291
Sundry 293
Stock 293

End of Day 293
Tills 293
Cheque 294
Card 295
Finance 297
Cashbook 298
Accounts (Full) 299
Sundry items/Products 299
Accounts (Full) information 300
Utility 301
Backup 301
Merge Patient 302
FP17 303
Load Doctors 303
Setup 305
Program 305
Practice 318
User Setup 320
Quick Codes 324
Documents 325
Documents 325
Buttons 326
Ribbon 328
How to improve the format of a document sent as an email 334
Custom Merge Fields 336
Merge Text 338
Printers 340
Watermarks 341
Books 343
Session Types 349
Appointment Reasons 351
Cancellation Types 353
Product 354
Schemes 354
Item 355

Price List 358
Implants 359
Contacts *General* 360
Laboratories 364
Suppliers 367
Medical 374
Questions 374
Conditions 375
Medical Practices 377
Miscellaneous 380
Email Accounts 380
Occupations 383
Quick Text 384
Finance Companies 386
Referral 390
Referral Types 392
User Defined Fields 393
Treatment Completion Screen 395
Tax Codes 399
Patient Status 401
BCDS 402
Transmissions 403
SMS 404
Select the template you wish to use for each event above 408
Backup 410
Library 411
Labels 414
Recall Types 415
Quick Note 416
Marketing 417
Additional Information 418

About Systems for Dentists

Systems for Dentists Ltd was founded in 1985 and have continued to provide quality dental practice management software ever since, working alongside our resellers, to promote and deploy our systems to dental practices primarily on The United Kingdom and the Republic of Ireland.

We strive to offer the best in dental practice management software, focusing not only on clinical practice but involving the entire practice team in the planning, running and management of the dental business. It is our belief that by working closely with every team member involved in the dental practice, we are able to ensure that systems are designed appropriately for each department. We endeavour to maximise the efficiency and communication between each team member regardless of their job role.

It is our belief that every practice has the right to run their business in a manner most appropriate to themselves; we have worked hard to develop our software to enable flexibility while retaining enough structure to ensure quality.

From the conception of the company in 1987 we have developed the dental software internally and we pride ourselves on building strong, long-term relationships with our clients. All clients have direct access to the programming team who not only understand the language of dentistry but are also very experienced in application development.

Introduction

Purpose

This document is designed as a reference tool, which should enable you to discover and understand the many features and functions available in SFD v6. Additional information and tips on the use of our software can be found at www.sfd.co/faq.html.

If you are new to Systems for Dentists, our feature rich program may seem a bit daunting. This manual will take you through the most basic steps, for example, logging into the program, all the way up to the more complex things, such as reporting.

Should you have any questions regarding these resources please call our support team on **0845 643 2727** or email **info@sfd.co**

System Requirements

To get the best performance from our dental practice management software you require the following minimum system requirements:

- A screen resolution of 1024x768
- 1.8Ghz Dual Core CPU or higher
- 512MB graphics memory
- 2GB RAM
- 100 Megabit network card
- Windows 7 or later
- An active internet connection (This is to receive software updates and technical support)

Updates

Our clients are actively encouraged to make feature requests and propose ideas that they would like to see included in the systems future versions. Our UK based programmers ensure these suggestions are integrated and developed to give the best possible dental practice management software for all practices with regular updates – this access to our development team is one of the key benefits to choosing Systems for Dentists as your dental software supplier.

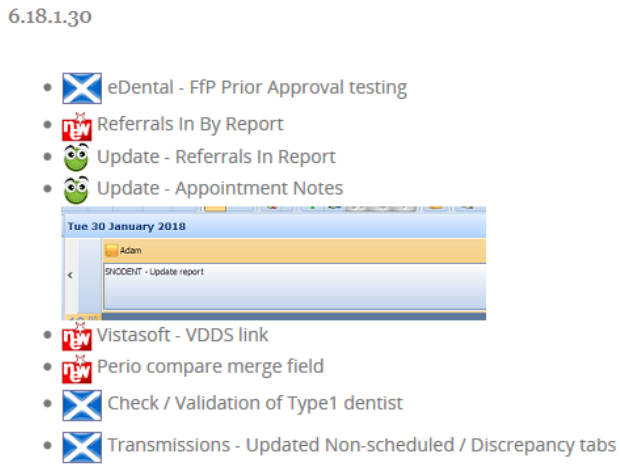
Such features are included in a general updates of the dental software. General updates are released frequently. You will notice if an update has taken place as you will be guided to the **What's New** section of our website when you launch Systems for Dentists.

Automatic updates require an internet connection; this is also a key part of your support agreement as remote support will not be possible without a connection to the internet.

What's New

The **What's New** section of our website allows you to see all the new features that have been added into your dental software. The page displays the version number with bullet points explaining the new features. This section also includes information on any bugs that have been corrected within the program.

The screen below shows an example of the page.



Follow this link to check out our latest features http://www.sfd.co/whats-new.html

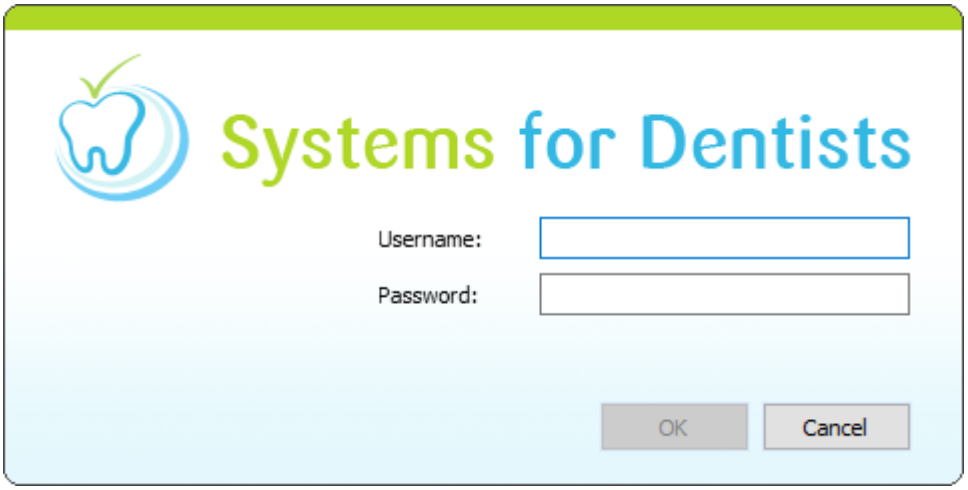
General Use

Starting the program

To start SFD you have a number of options. The most common method is to double click on the Desktop shortcut icon.

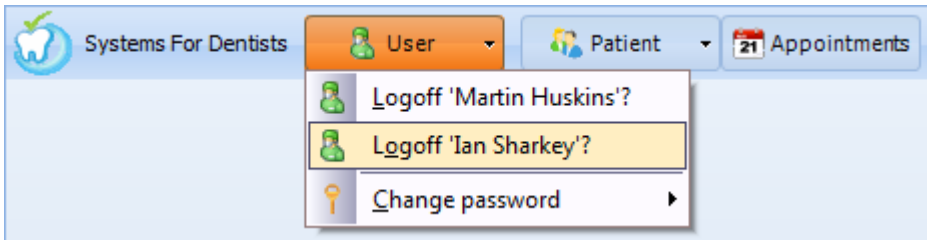
Logging in – Logging Off – Change password

When the program starts up it will automatically prompt you to enter your username and password in the **Logon** window.



Enter your username and password into the window. Click the **OK** button, to log on.

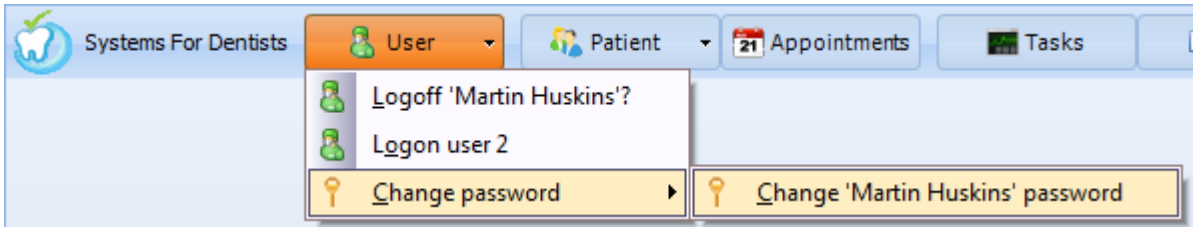
Note: SFD allows dual log on. You can see who is logged into the system by clicking the User button at the top of your screen.



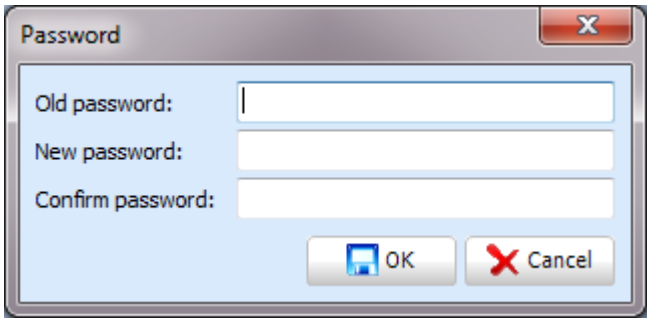
In this particular example you can see that two users are currently logged onto the system.

To log off, click on the **"User"** icon and click on the name of the user you wish to log off.

This section of the dental software also allows a user to change their password. It is important to the security of your data that passwords are changed periodically. To change your password, hover over the '**Change password**' option at the bottom of the menu and click on the user displayed for whom you are making the change. An example is shown below.



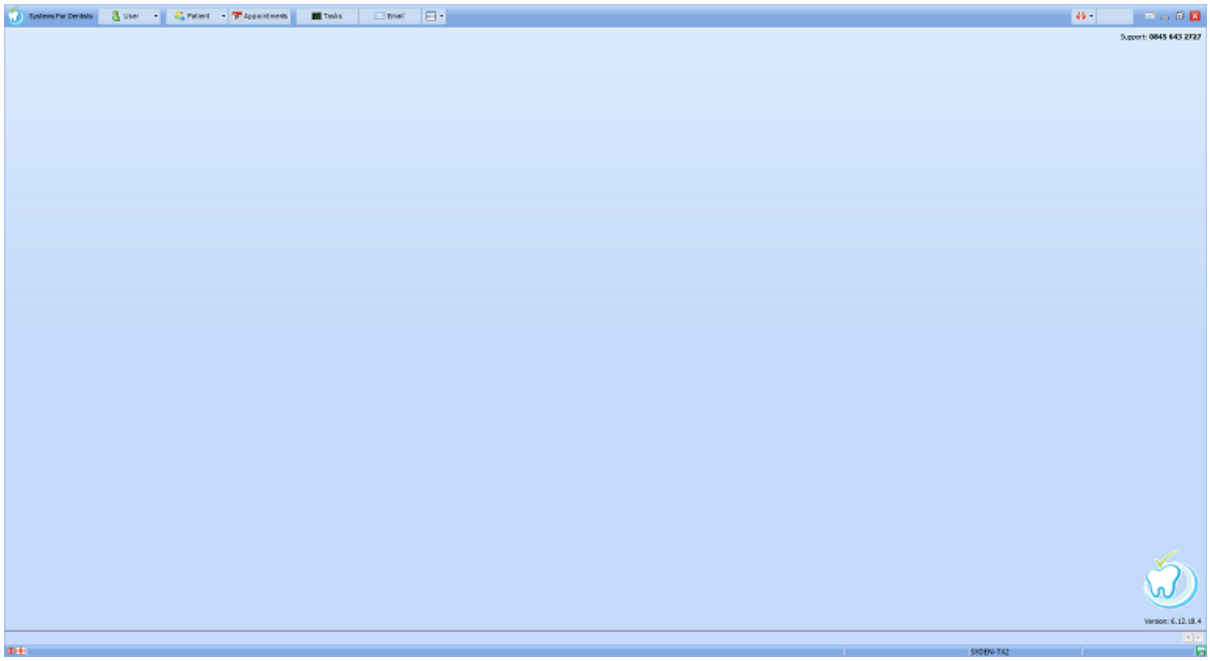
In this particular example we are changing the password for Martin Huskins. After clicking **Change 'Martin Huskins' password** the following **Password** window appears.



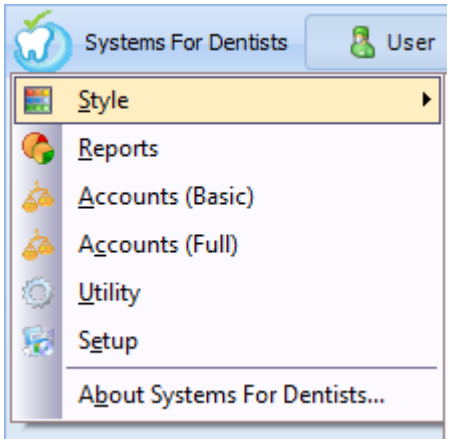
Enter the existing password into the **Old password** text box, then type in your new password into the **New password** textbox and confirm your new password in the **Confirm password** textbox**.**

Home Screen

Once you are logged on you will be presented with the SFD home screen. This section of the manual addresses what you will find.

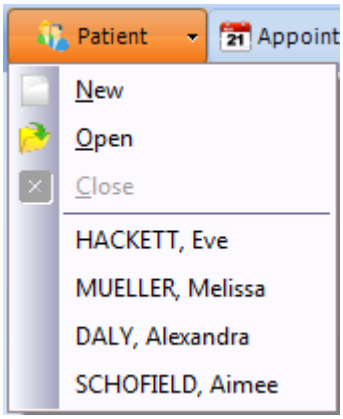


Starting in the top left of the home screen you will see the SFD icon, clicking on this icon displays a menu. From this menu you can access various sections of the program, such as setup and reporting.

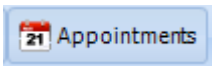


The second button is the User button that we previously explored.

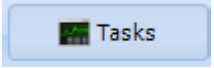
To the right of the **User** button you will find the **Patient** button. This is where you can create and open patient records.



Next, we have the **Appointments** button. This takes us to the appointment book, from this screen you have the ability to book, cancel and change patient appointments.

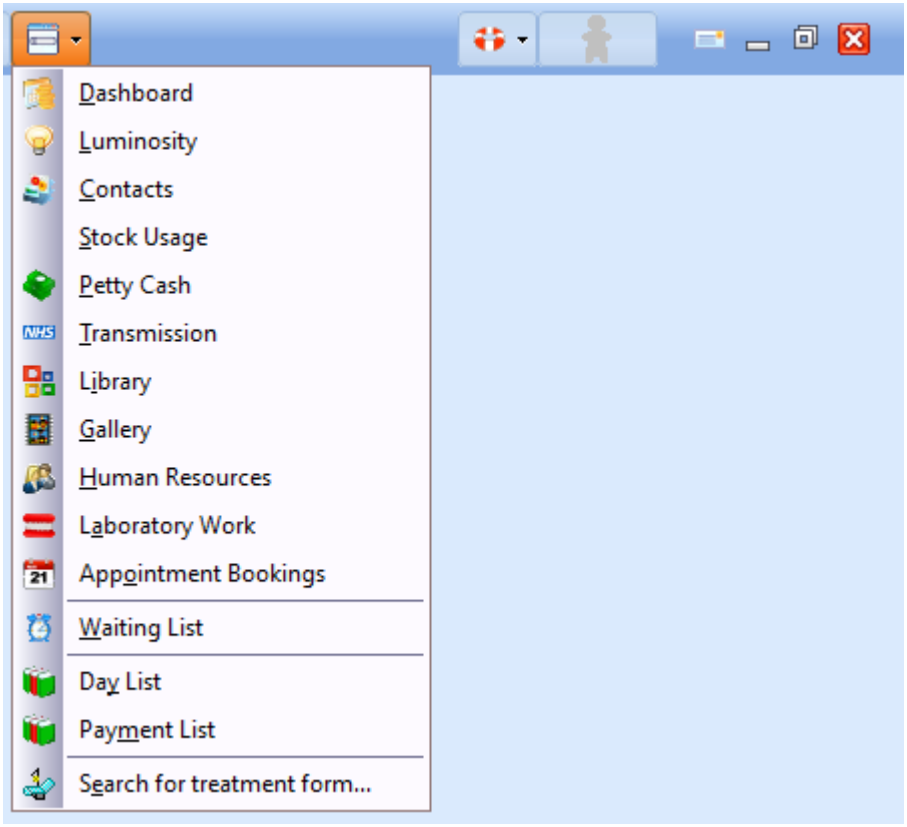


Next, we have the **Tasks** Button. By clicking the **Tasks** button you can see any outstanding tasks you may have or create new tasks to be carried out. If you have any tasks which are currently due, this page will automatically open on logging in.



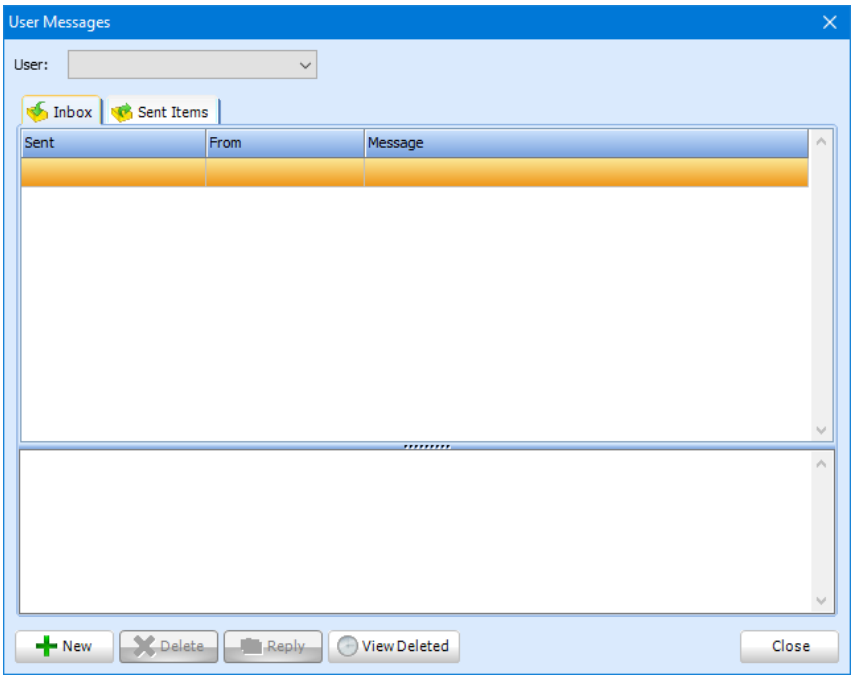
The next button is **Email**, here you have the ability to view any emails that are currently in your outbox waiting to be sent and your previously sent emails from within SFD v6.

Finally we have the **Options** split button. When you click this button a dropdown menu appears where you access items such as transmissions and stock usage.



User messages

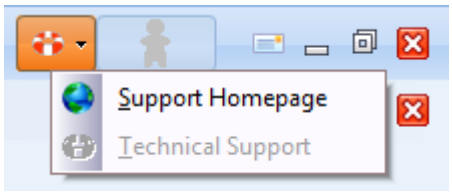
At the top right of the above image is an envelope is the user messages section of SFD. Clicking this shows the below window where you can send an internal message to any other SFD user.

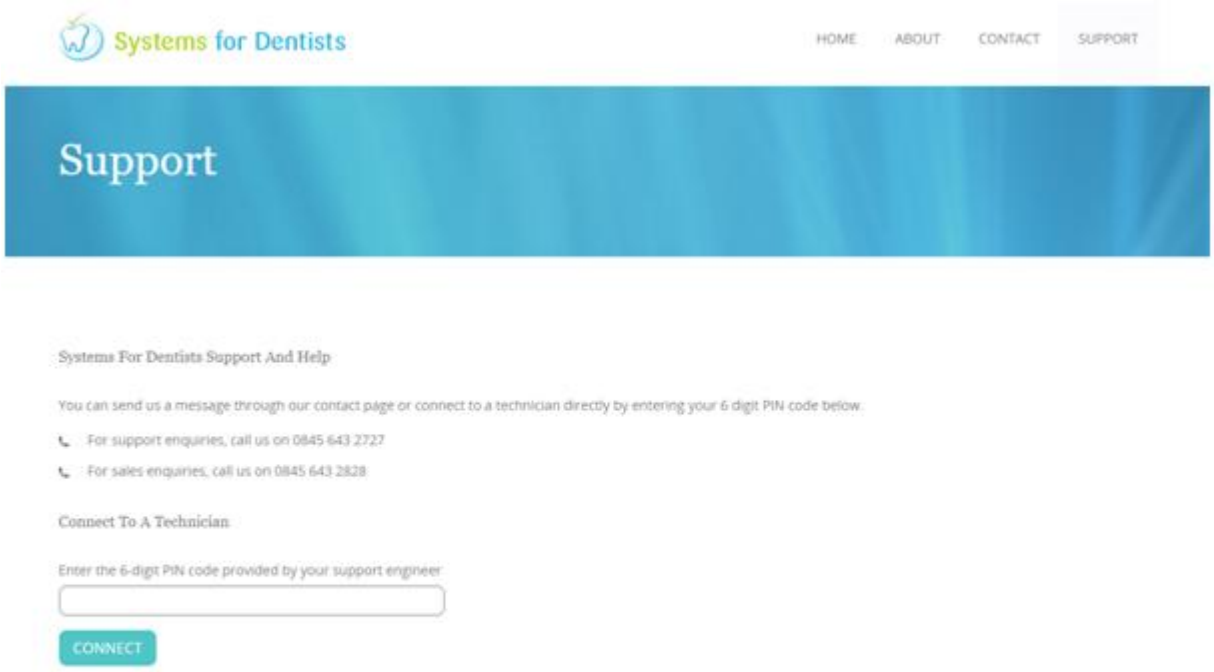


There is also a reminder at the bottom right of your screen with the total number of unread messages. This will flash if there are one or more.

To the left of the **Messages** button you will find the **Help** button. From the dropdown menu you can access our **Support Homepage**, clicking this button will open your default internet browser and load the support page of our website. From our support page you can request a remote support session, once a member of the SFD support team has supplied you with a single use access pin.

For your security and convenience we use a professional remote support tool called LogMeInRescue® information about this service can be obtained from the LogMeIn® website https://secure.logmeinrescue.com/uk/helpdesk/howitworks.aspx





Note: For any support issues/queries please call support on **0845 643 2727** (this number is present in the top right hand corner of the home screen), alternatively send your query via email to info@sfd.co .

Finally in the bottom right of the SFD home screen you can see the current version number of the program. You may be asked for this information when calling support.

Version: 6.18.7.18

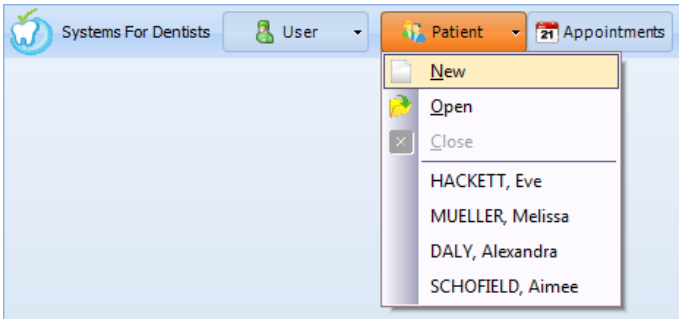
Patients

Patient information constitutes the vast majority of any Dental Practice Management Software. We have designed our system to be as intuitive as possible. As you would expect from a Dental Software application, basic information such as name, address and date of birth are stored within the patients details screen including many customisable features that allow you to store additional information at a glance.

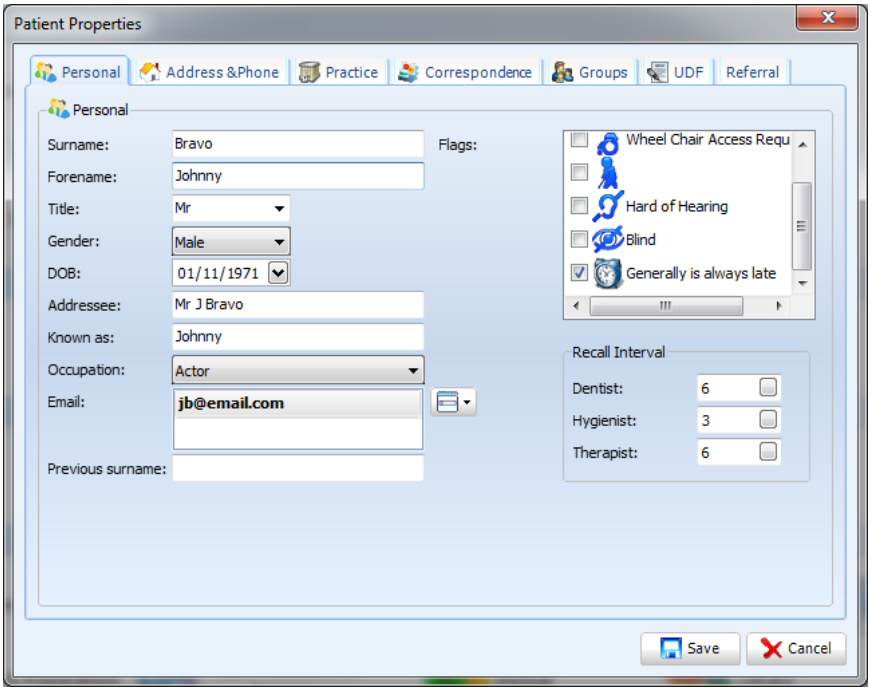
In this chapter we will explore the entire patient record, it is important to remember some options are customisable and therefore if you have additional information you would like to store within a patient, it is highly likely a space for this data can be created. All of this information is reportable.

Creating a new patient

To create a new patient within SFD v6, click on the **Patient** button at the top of the home screen, and a dropdown menu appears, select **New**.

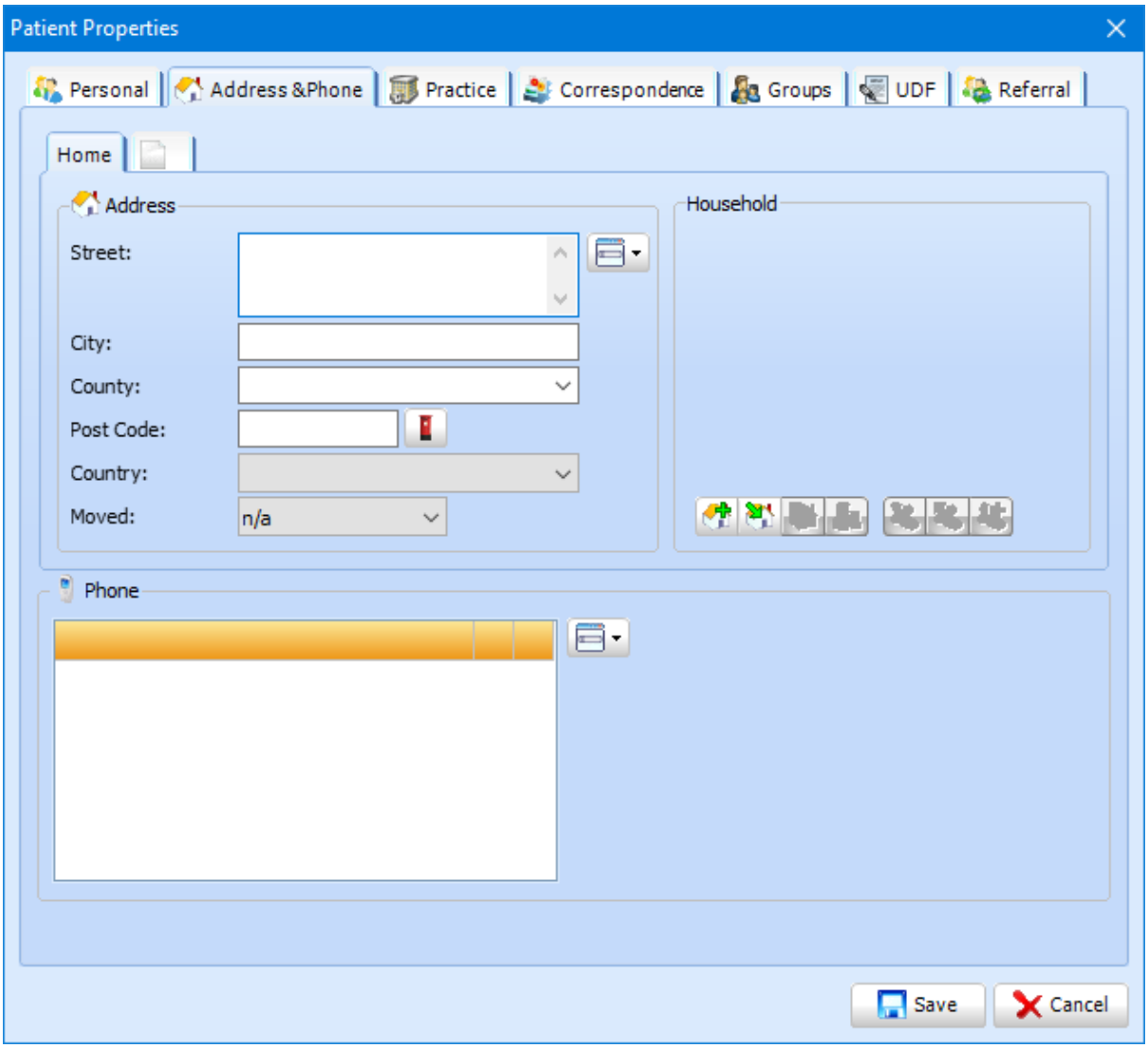


The **Patient Properties** window will now open. By default it will open on the **Personal** page. This is for filling in details such as surname / forename / DOB / gender and email address. You also have the ability to add patient flags; these can be a useful tool for identifying special requirements a patient may have. You can also set the default recall interval for the patient. The **Patient Properties** window is shown below.



Tip: *Using the drop down option for adding email addresses you can also select which address is the default, this will automatically be selected by the system for all automated email activity for example email appointment reminders.*

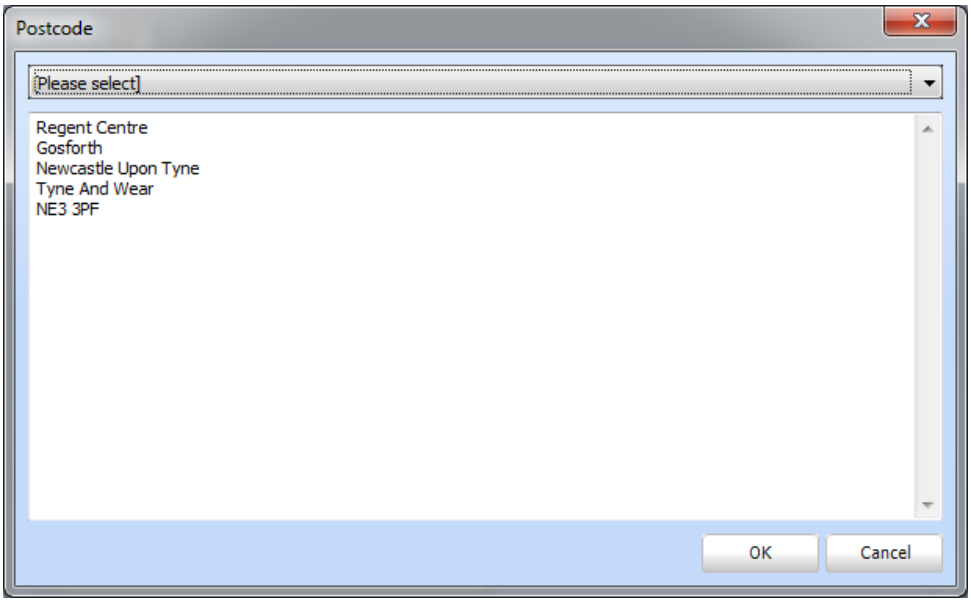
The next tab is **Address & Phone**.



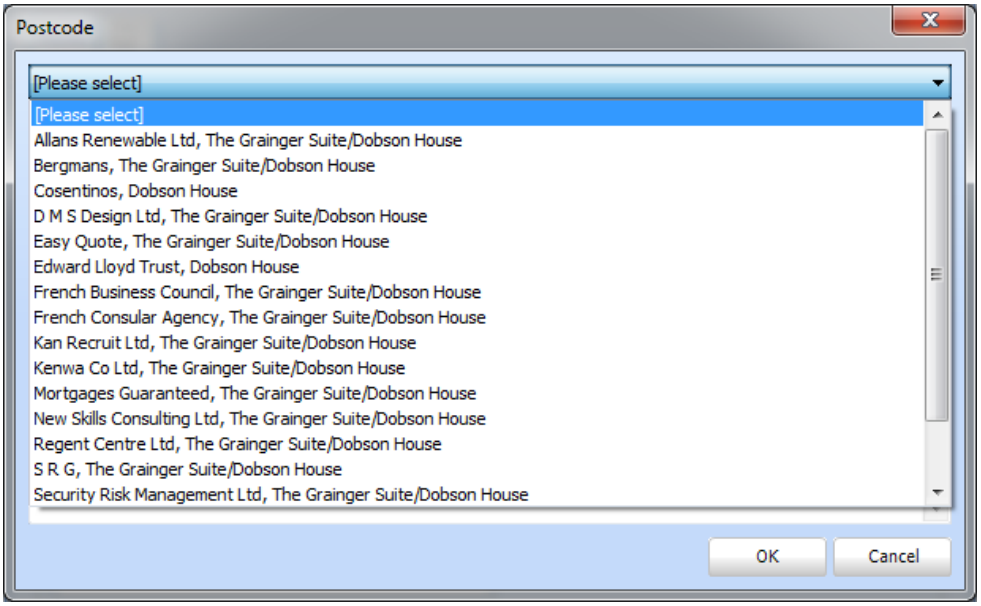
Note: *Next to Postcode you will see a letterbox icon. This allows access to our postcode lookup software which is an additional paid for feature; we have received great feedback from our clients with regards to this service, as it saves reception staff considerable time, also reducing the likelihood of errors. All you need to do is type in the postcode and click the letter box icon and it will automatically fill out the Street name, city and county (example below).*

Once you have added the postcode into text box, click on the letterbox button.

You will be presented with the Postcode window.



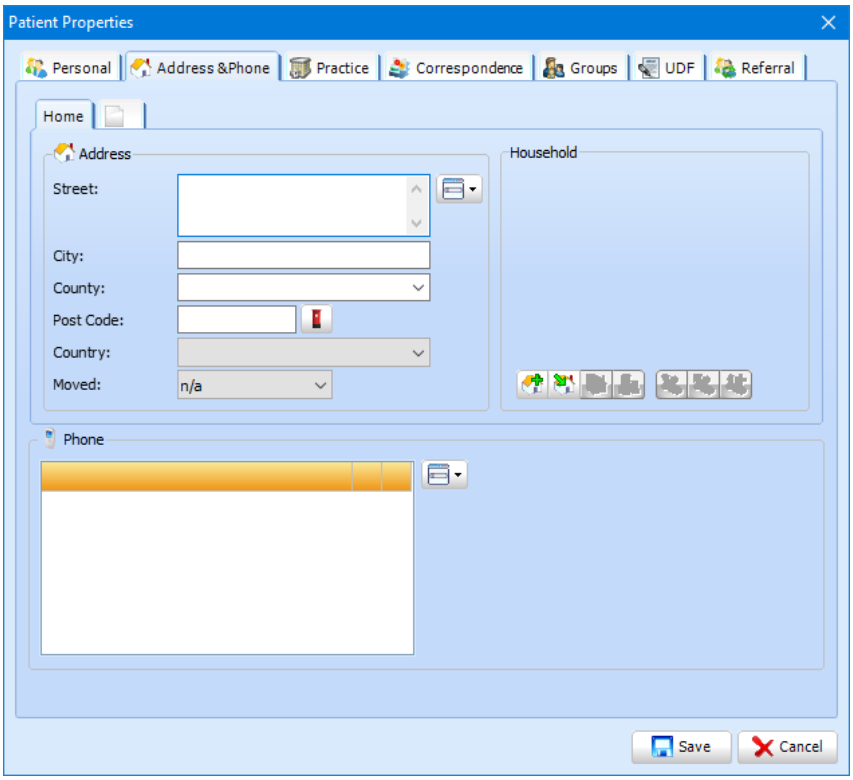
*Now all that is left to do is to **select the house name/number from the dropdown list**.*



*Click the **OK** button to confirm.*

This is an addition to the program, for details please call Sales on 0845 643 2828 or email info@sfd.co quoting "Postcode Lookup" to find out more.

To the right hand side you should see the **Household** section. This feature is useful for booking family appointments (refer to the Appointments section of the manual).



To create a new Household click the **Create a new household** button. Click yes; the patient will now be displayed in the Household list.

You can appoint a head of household. This is done by selecting the patient you wish to appoint then click the **Set patient as head of household** button.

Tip: *Some reports have the option to output only the head of a household, should you require, thus ensuring this information is accurate could save a significant amount of time and money when sending large mailings.*

To add further patients to the Household, you have two options. The first option is to add an existing patient, click on the **Add an existing patient to this household** button. The select patient window will open. Type the name of the patient you wish to add to the Household. Click on the patient from the search result and click select in the top right hand corner. The patient will now be displayed in the Household list.

The other option is to add a new patient to the Household. To do this, click on the **Add a new patient to this household** button. The **Patient Properties** window appears. Fill this in as you would for any other new patient.

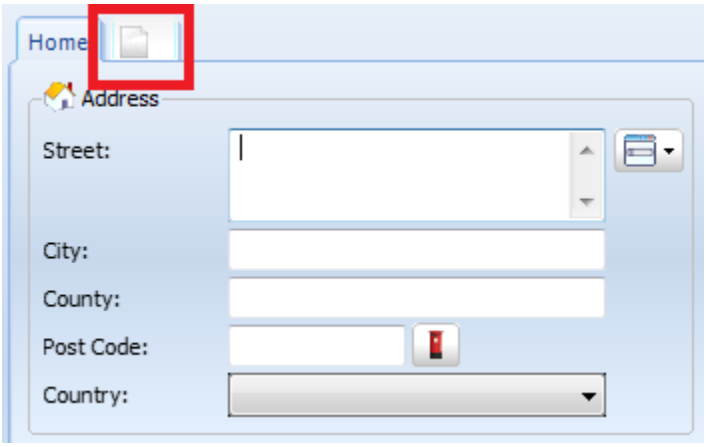
Note: *The Address & Phone tabs are not displayed.*

Once you have filled in the information, click Save. The patient will now be displayed in the Household list.

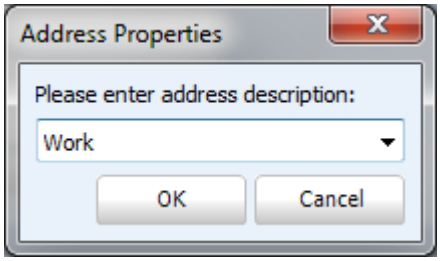
If you change the address of one of the patients within the Household it will automatically update this information for all other members of the Household.

The system will also inform you if you try to add a patient to a Household that is already a member of another household.

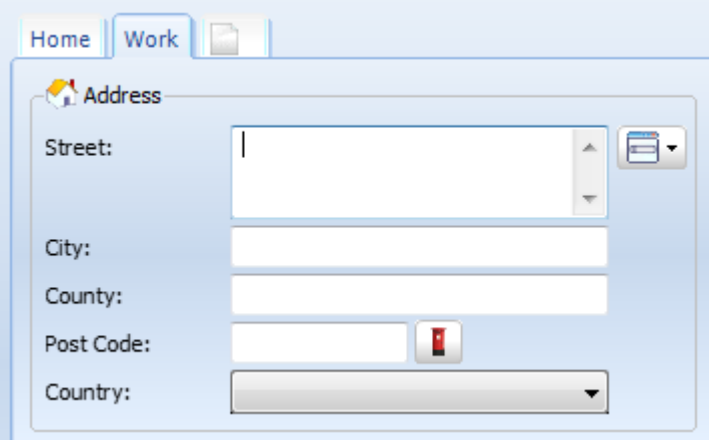
Within the **Address & Phone** page you have the ability of supplying alternative addresses. To do this, click on the tab situated next to **Home**.



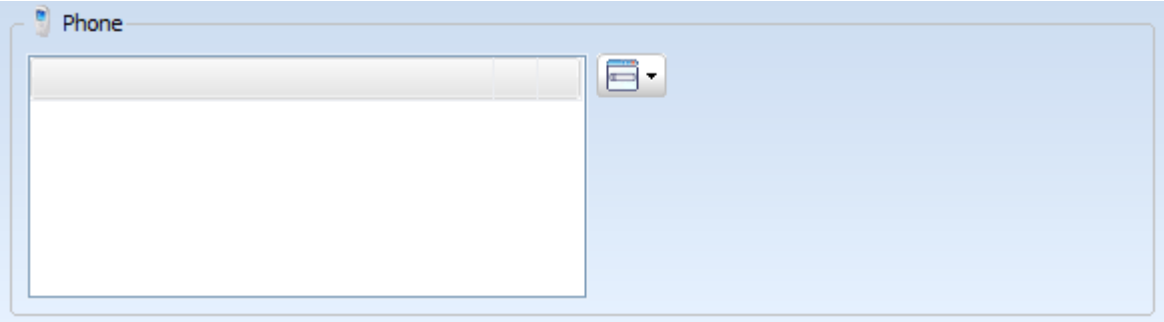
Once you have clicked on this tab, you will be prompted to enter an address description, for example, **Work**.



Once you have clicked the **OK** button to confirm, you will now see that there is a tab named **Work** as well as **Home**. You are now able to flick between the two addresses.

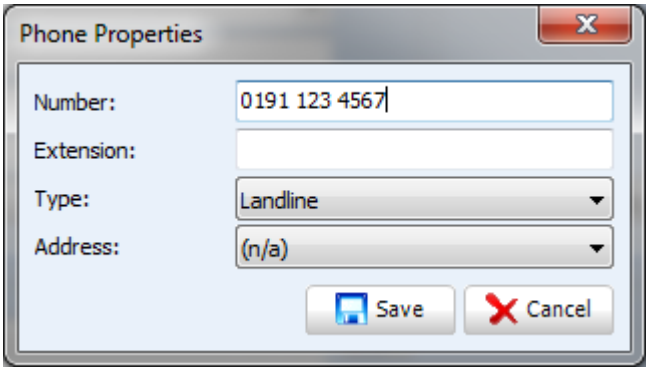


To add a telephone number to the patient record, click on the spilt button within the **Telephone** section.



After clicking on the split button you will be presented with the following options.

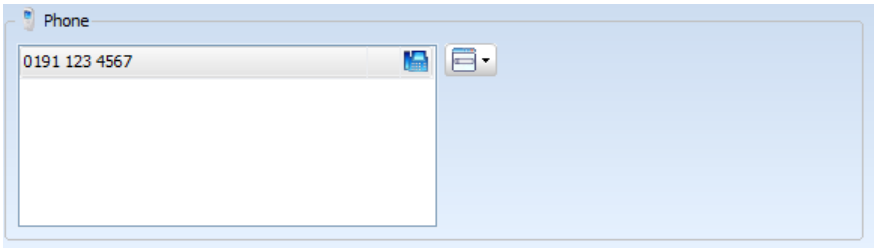
Click **New** to add in a telephone number.



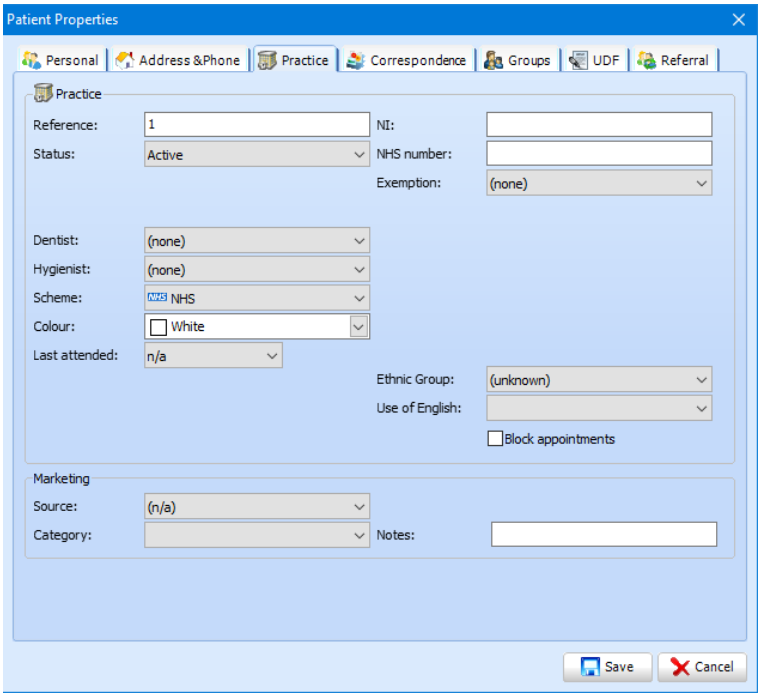
The **Phone Properties** window appears (above). Type the number and extension (if applicable) into the appropriate text boxes. Then select the type from the dropdown list. Click the **Save** button.

Hint: *if you are entering a mobile number the Type will automatically update to reflect that saving you from having to make the selection manually. You can enter a word into the extension field such as "mother's mobile" or "Work" to denote a contact type.*

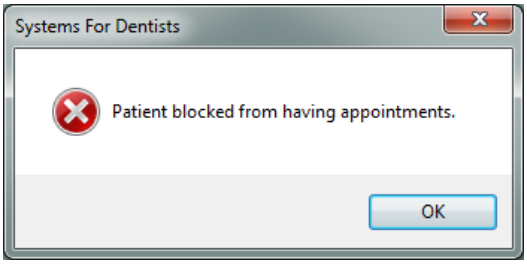
The number will now be present in the **Telephone** section.



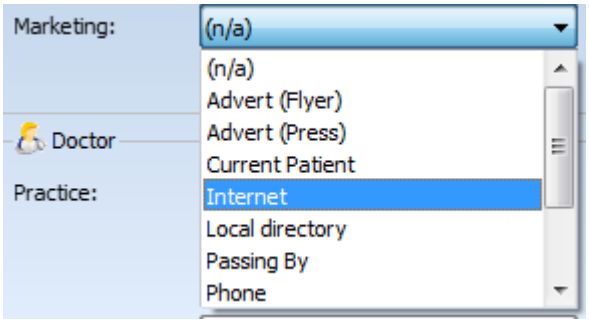
The next page is **Practice** which is used to fill in details such as the name of the dentist the patient usually sees, the patients GP's information, how the patient heard about the practice and any social exemptions for example NHS patients who do not pay for their treatment.



You have the ability to block the patient from being able to have appointments booked for them by checking **Block appointments**. When a user attempts to book an appointment for this patient, they will be presented with following dialog box. Additionally when searching for a patient, selection will show the patients name in red to denote they are currently blocked from having appointments booked.



Within the **Practice** page you can also store marketing information. This is very useful as you can run a **Marketing** report. From the report you can then identify weaknesses and look to strengthen in that particular marketing activity.

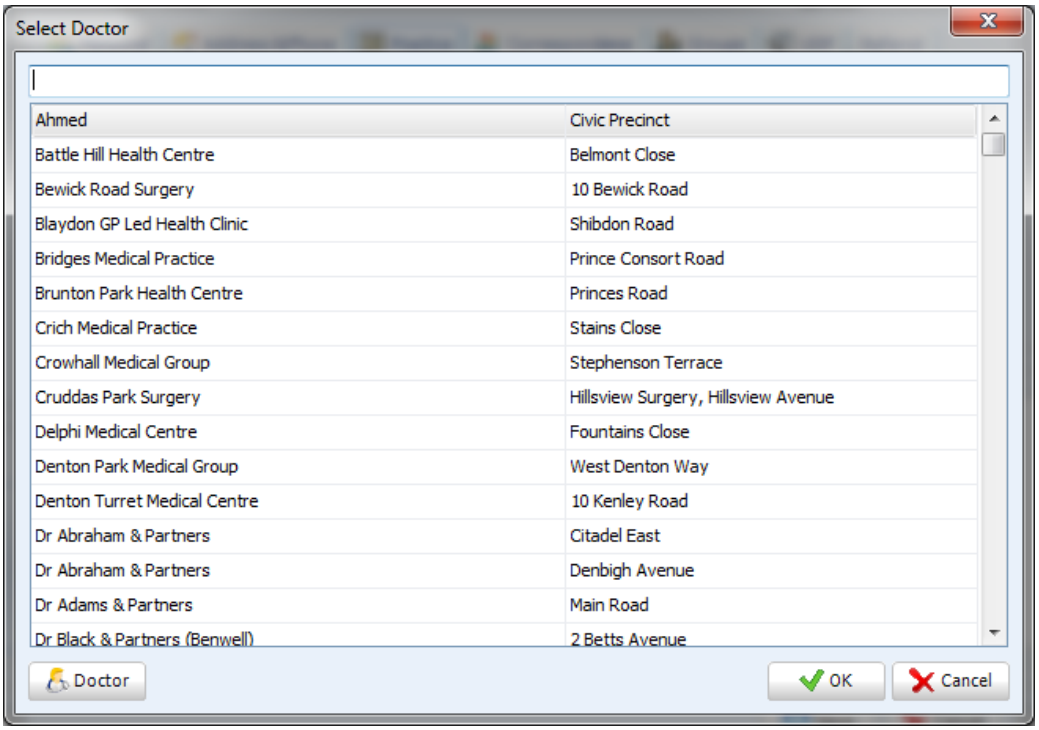


Select the appropriate option from the dropdown list.

You can also add additional marketing options (refer to the **Setup** section of the manual).

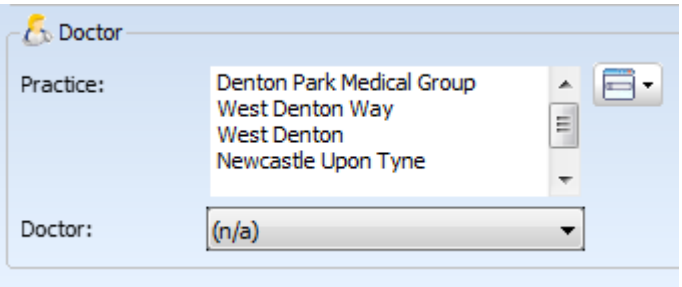
To assign a GP to the patient click on the split button in the **Doctor** section.

Click **Select**, the following window will then appear.



Select the desired general practitioner from the list then click OK in the bottom right hand corner of the window. If the Doctor you wish to assign isn't in the list, click on the **Doctor** Button in the bottom

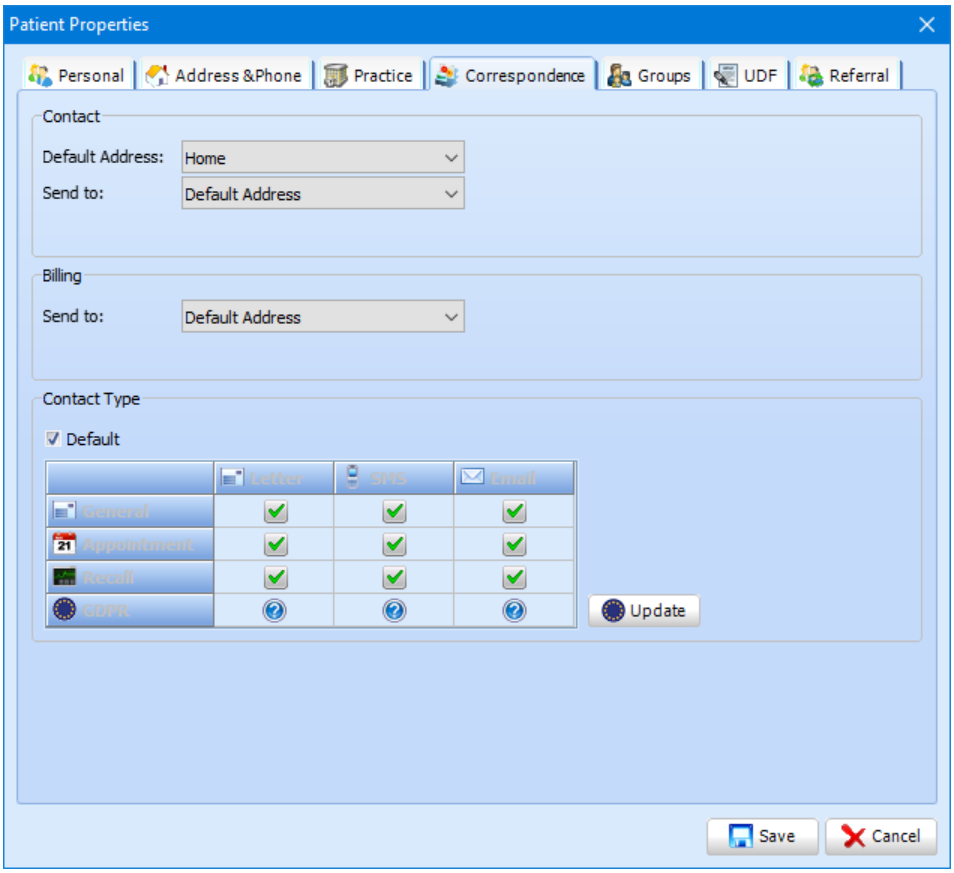
left hand corner of the window to add a new one. The Doctors info will now be entered (example below).



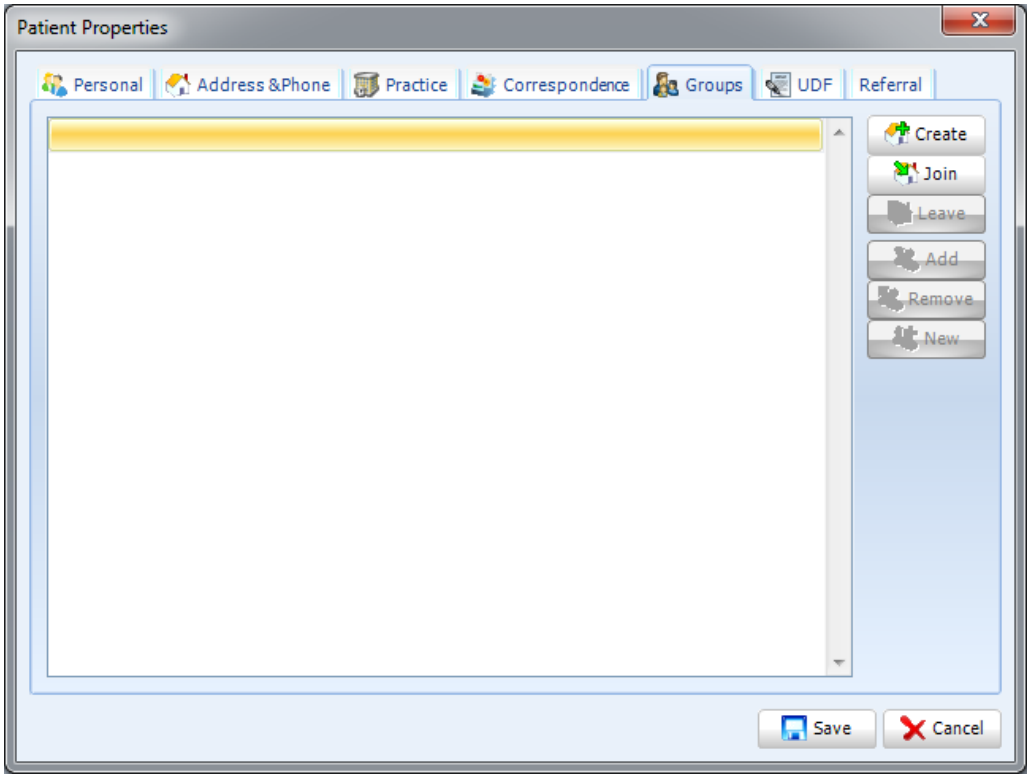
Note: *You can automatically load doctors within a certain radius of your practice. Please refer to the Utility section of the manual for more information.*

The **Correspondence** page is where you set up contact preferences for the patient. Select the contact and billing preferences from the dropdown lists. Finally, select which means the patient wishes to be contacted by (if different to the default uncheck the **Default** checkbox and then select the appropriate options from the grid).

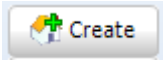
Note: To set the practice Contact Type default, refer to the Program Setup section of the manual).



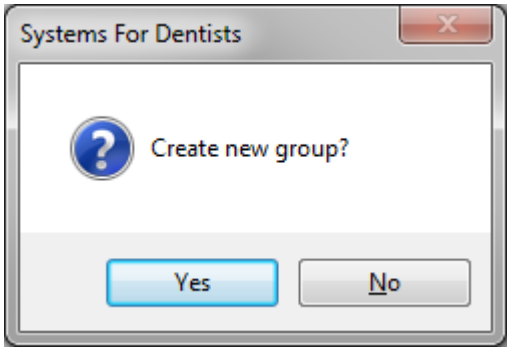
The next page is named **Groups,** here you can create a new group for the patient or add the patient to any existing groups.



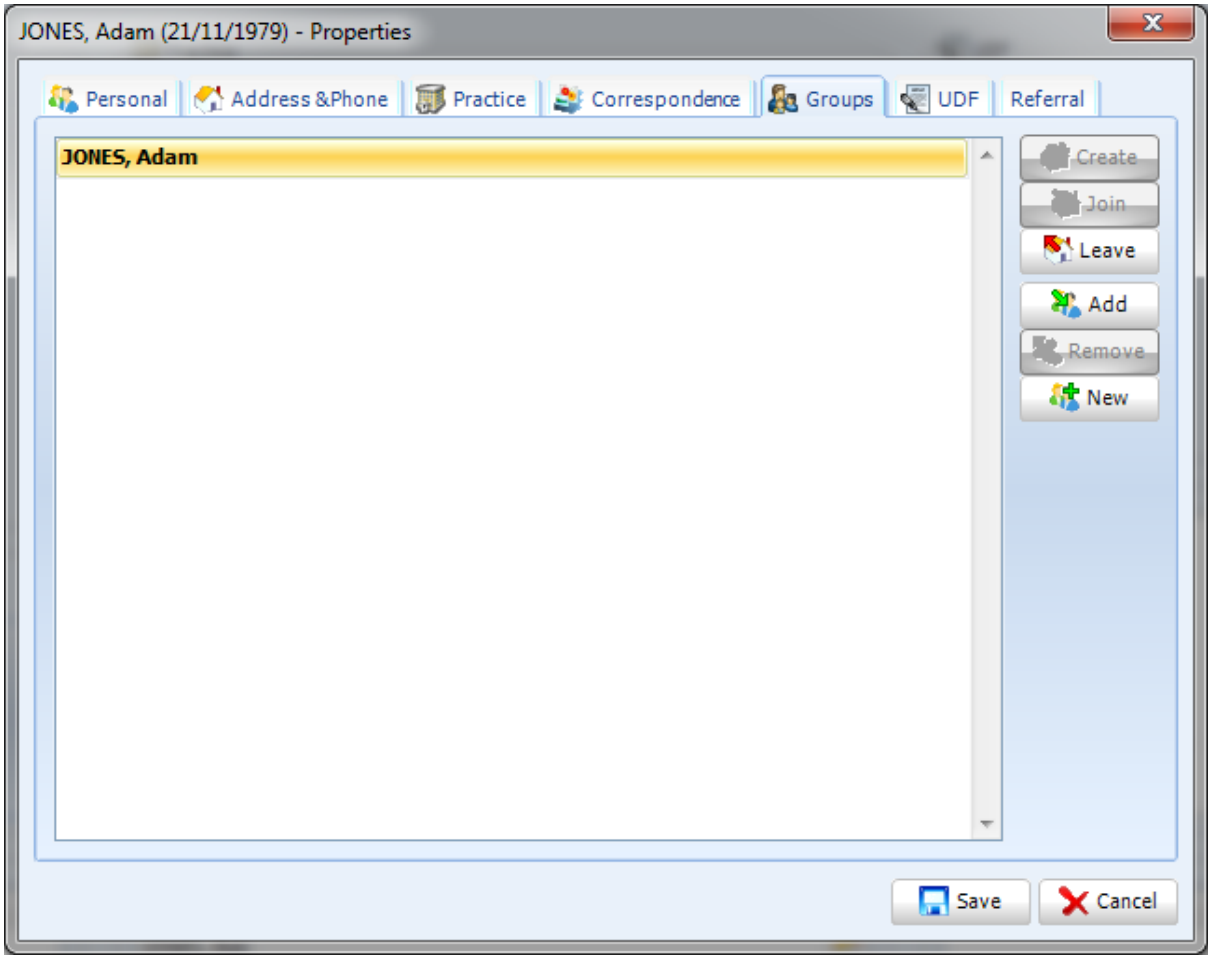
To create a new group click on the **Create** button.



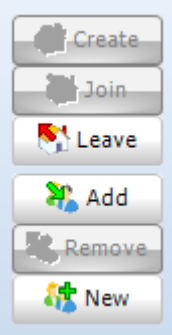
Click **Yes** in the following dialog box to confirm.



You have now created a group.

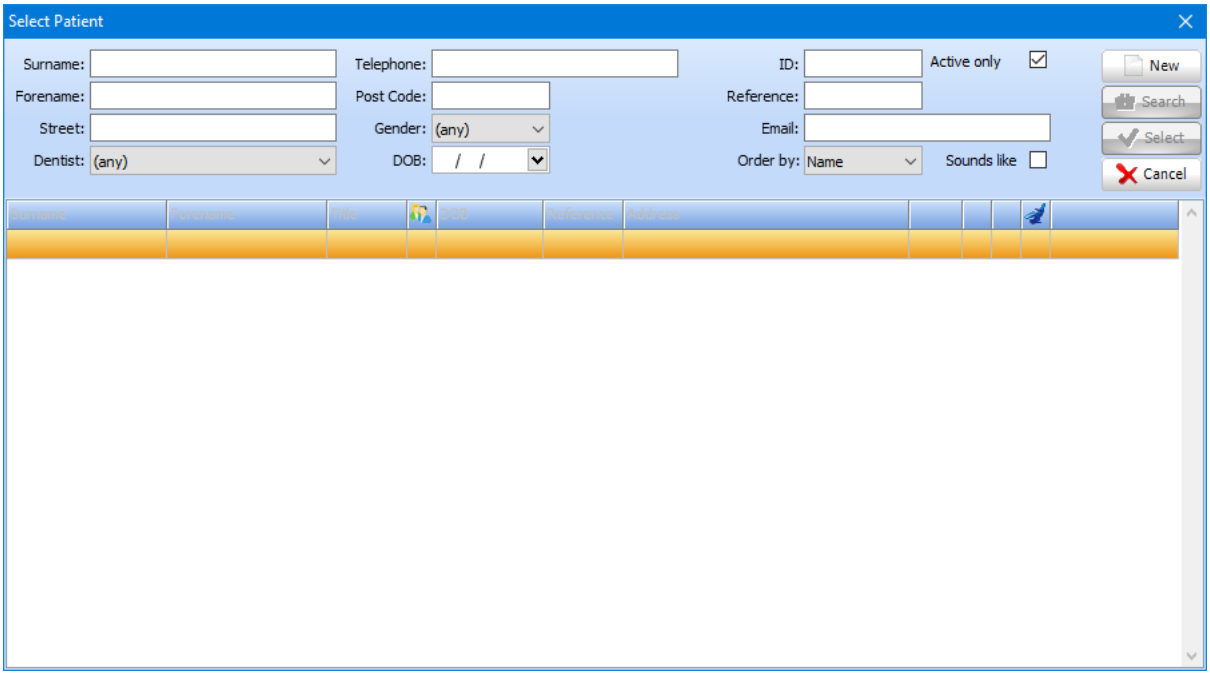


From the screen above you can remove patients from the group, add existing patients and add new patients to the system into the group by using the button on the right hand side of the page.

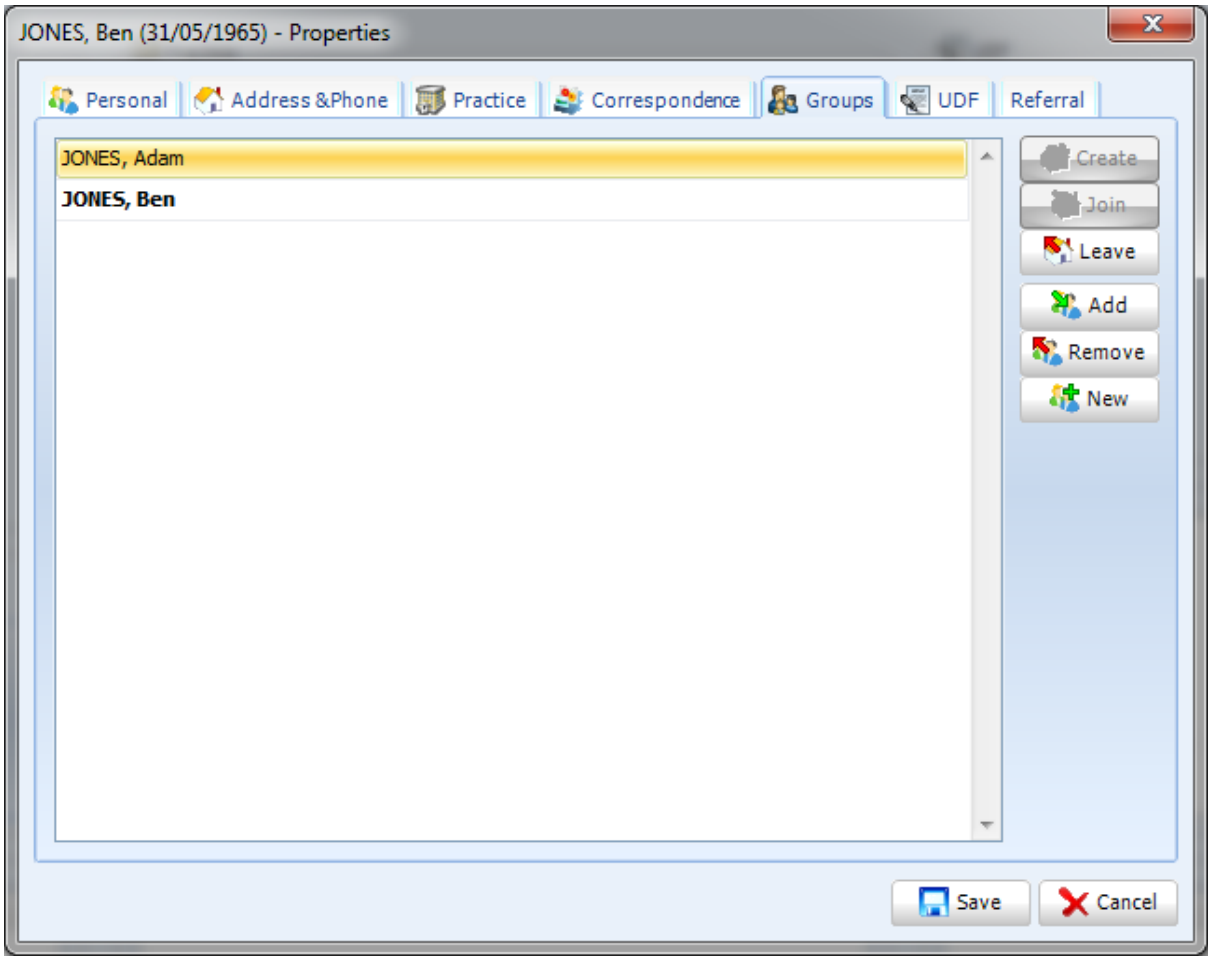


You can also join existing groups by using the **Join** button within the **Groups** page.

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



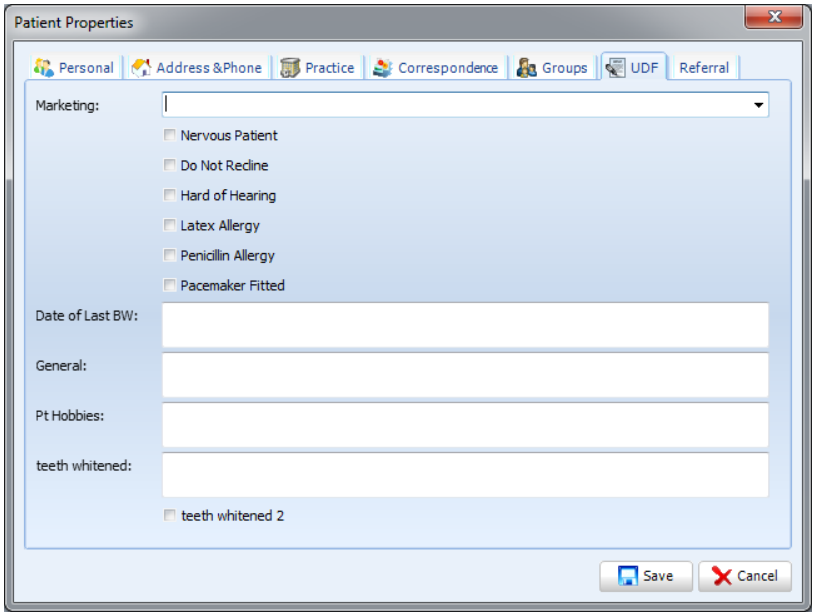
Select the patient that is already a member of the group you wish to add the patient to. Double click on the patient. The patient will now be a member of the group (example below).



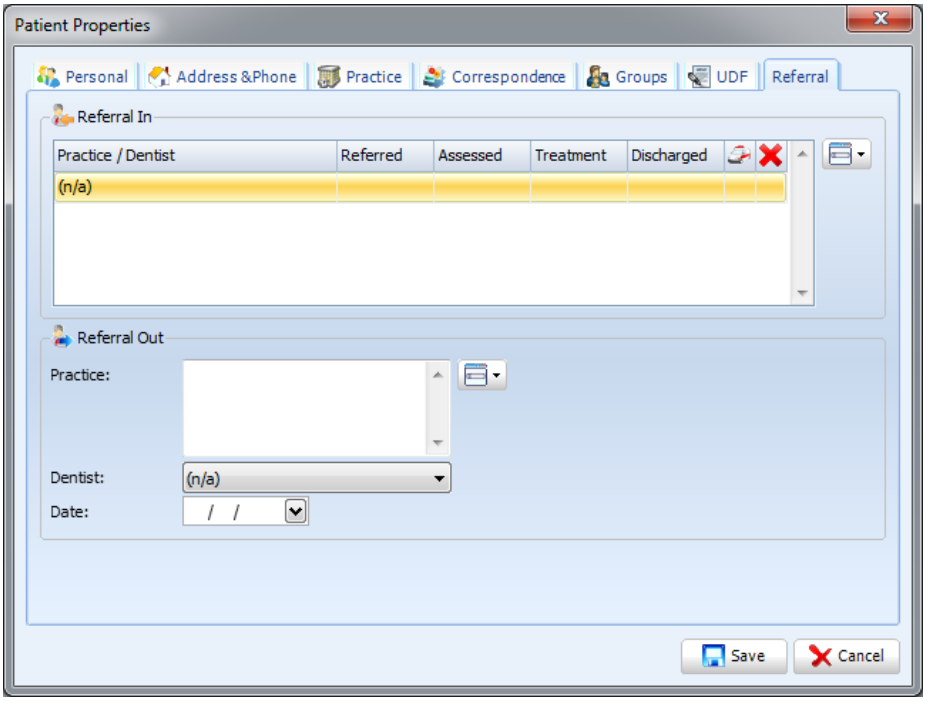
You can also add patient's to the group by using the **Add** button. Or **New** if you wish to add a patient that isn't already within the system.

Unlike the household function, groups are designed to link one patient to several others without the association of addresses. Groups are primarily used to link patients to members of their family who reside at different addresses.

The next tab is named **UDF** (User Defined Fields), in this section you can store information in any fields you have created. Refer to the UDF setup section of the manual to create your own UDF's (example below).

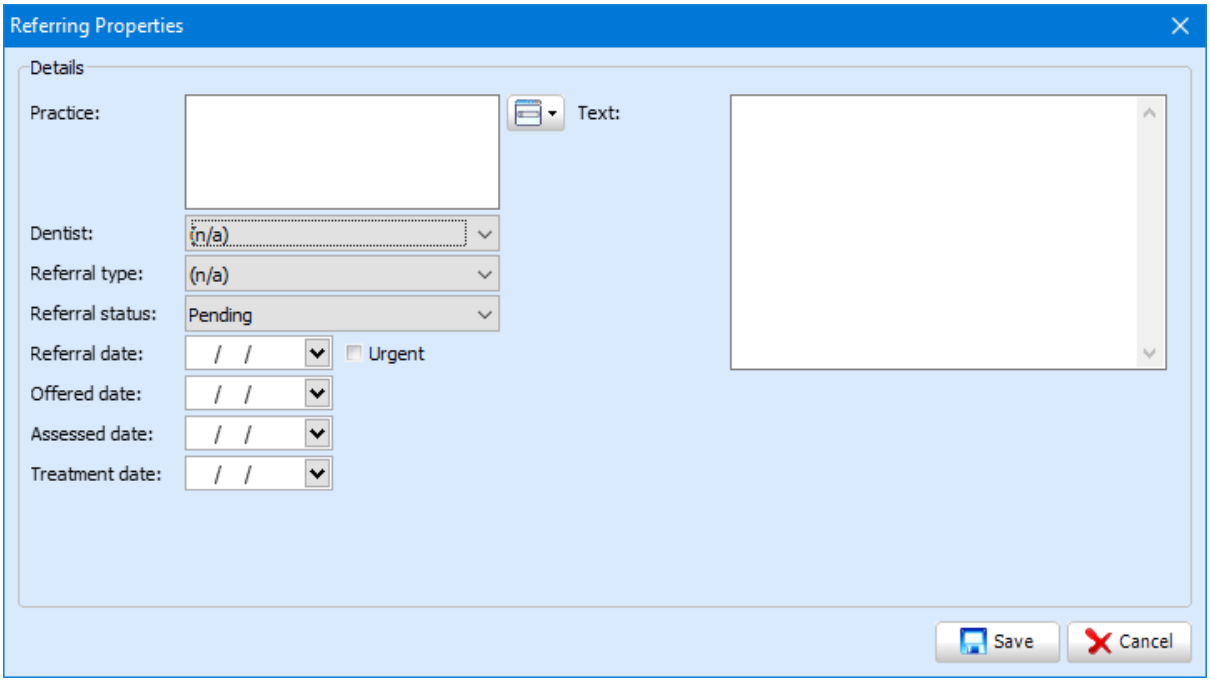


Finally we have the **Referrals** tab. Within this page you can add the patient's referral dentists (both inbound and outbound). It is important that you fill out this information as accurately as possible as you have the ability to run both inbound and outbound referral reports.



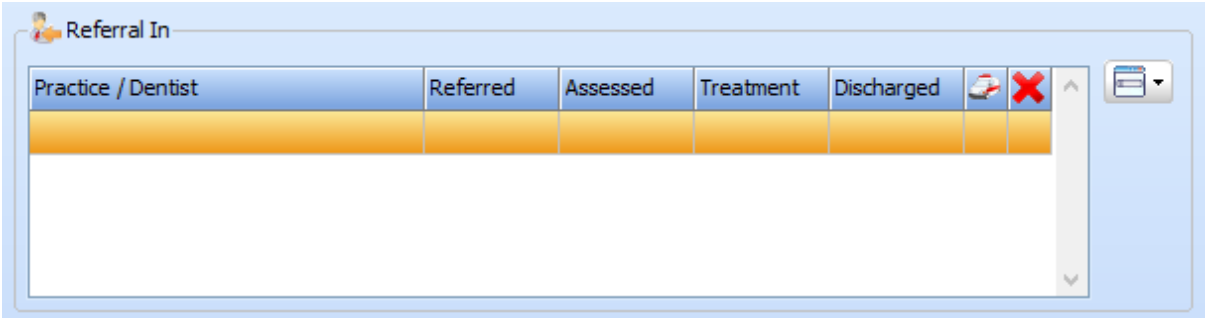
To add an inbound referral, click on the split button in the **Referrals In** section.

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

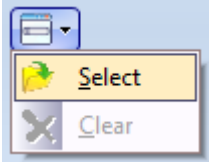


Once you have added the necessary information into the window click the **Save** button in the bottom right hand corner of the window.

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



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



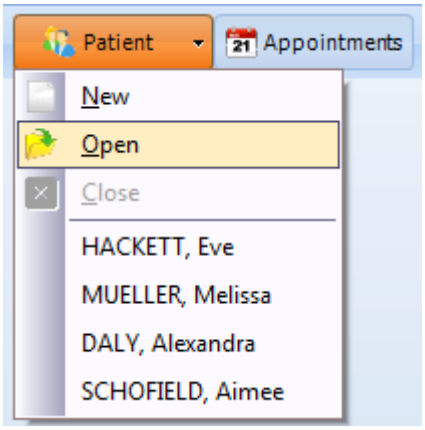
Click **Select**. You will then be presented with a list of your referral dentists. Select from the list then click **OK.**

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

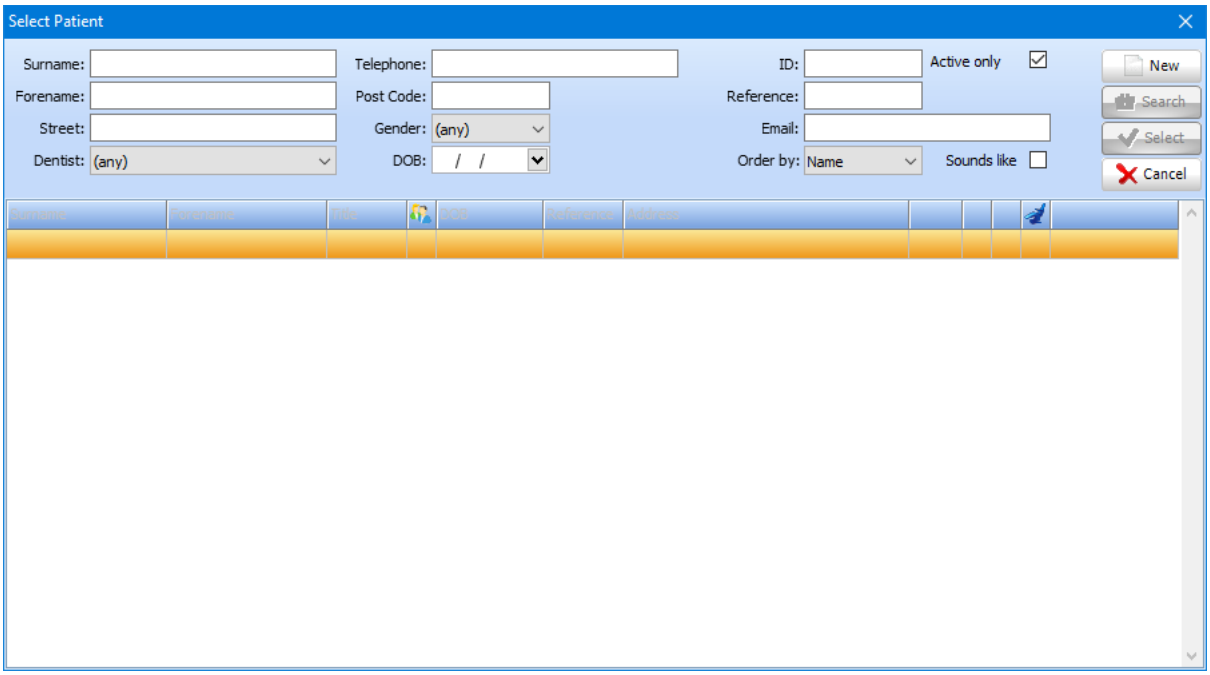
Opening patient records

To open an existing patient's record follow the steps below.

The first step is to click the **Patient** button at the top of the screen. Click **Open** from the dropdown list.



After clicking **Open** you will be presented with the **Select Patient** window.

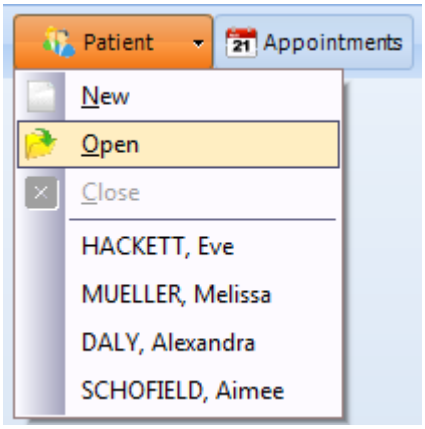


From this window you can search for any patient within your system. There are a number of filters you can use to search for a particular patient. Although Surname and Forename the most common options, you also have the option to search by dentist, DOB, gender, telephone number and patient ID and reference number.

You are able to enter the first initial of surname and forename and click **Search**; this will bring up everyone in the system with those particular details. Note that the **Active only** option will be checked by default; uncheck this option to include inactive patients in your search.

To select the patient who you wish to view, either left click on the patient and click the **Select** button or alternatively double click on the desired patient to open their patient record.

Note: *The last ten patients to have been opened will be present in the dropdown list after clicking the 'Patient' button. To open one of these patients click on the desired patient name from the dropdown list.*



Switching between patients

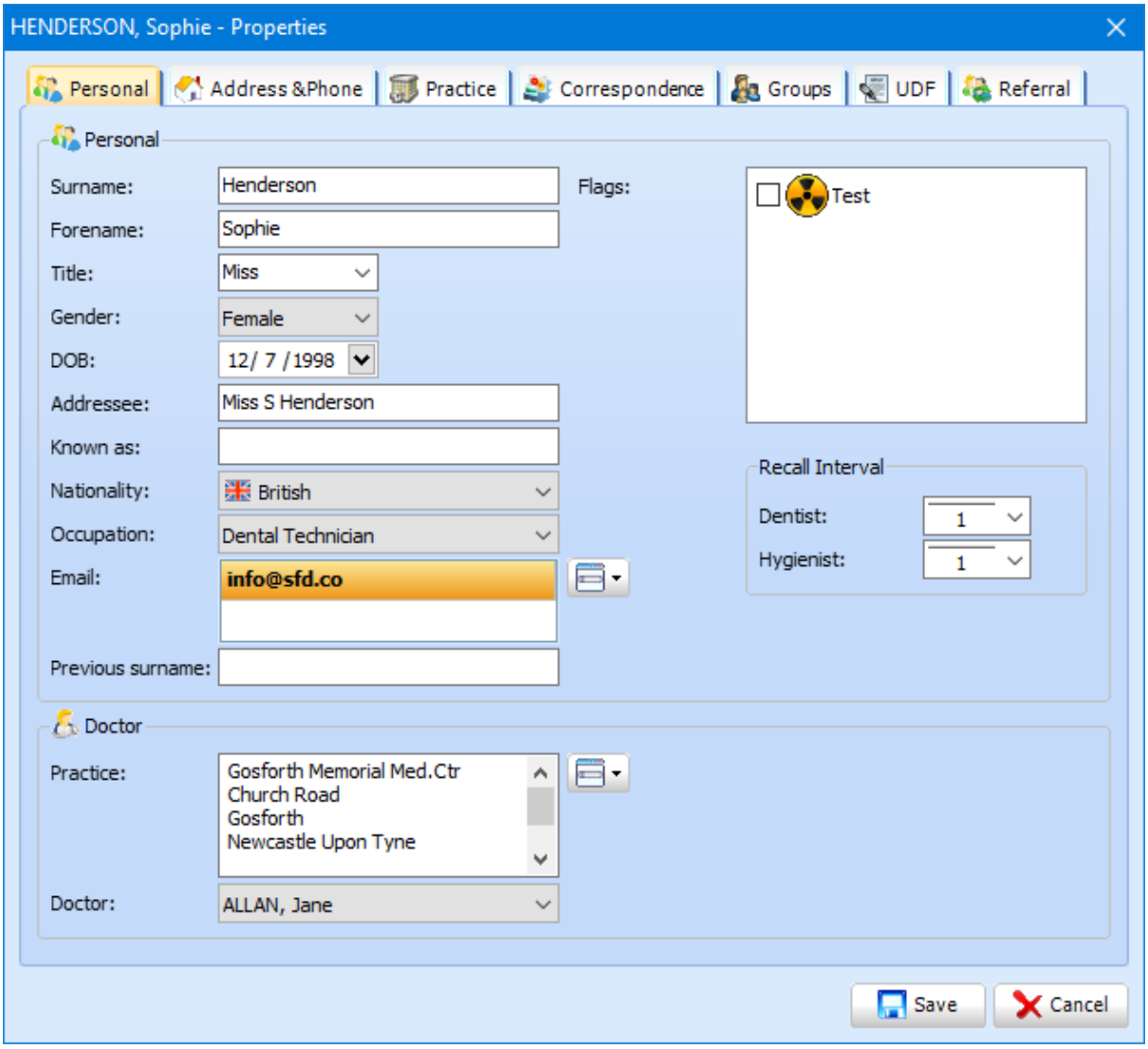
SFDv6 gives you the ability to have multiple patient records open at once. You will see all the patients that you currently have open in your dental software, along the bottom of your screen (example below).

To switch between patients, click on the tab with the patient's name you wish to view.

Editing a patient record

From the **Creating a new patient** section of the manual you will be aware of the amount of information you can enter for a particular patient. This information may change over time. To edit information in a patient's record, open the desired patient. Once you are within the patient's record, click the **Properties** button.

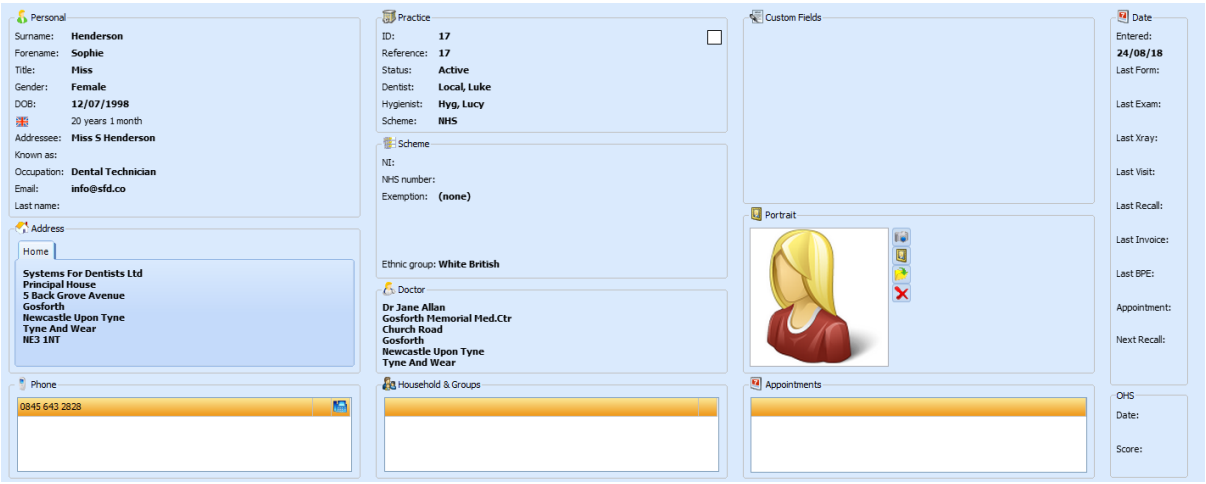
After clicking **Properties** the **Patient Properties** window appears.



You can now go through the various tabs and change the information required. Click **Save** in the bottom right of the window once you have finished making changes.

Patient Home Screen

Once you open a patient record (refer to **Opening patient records** section of the manual) you will be presented with the patient home screen (example below).



Within this screen you can see all of the patient's basic information (including information such as name, DOB pending appointment(s), last visit etc.). The home screen is split into different sections. These are the sections that are filled out during creating a patient (refer to **Creating a new patient** section of the manual).

You can navigate to any other of the patient screens from the home screen by using the buttons across the top of the screen.

From any other section of the patient record you are able to click on the button shown below to return to the patient's home screen.

At the top left of the patient screen you will be able to see the information shown below. This includes the patient name, date of birth and their current balance, the border colour surrounding these textboxes indicates what scheme the patient is assigned to.

Tip: *To change the colour you want displayed for certain schemes, refer to the Schemes setup section of the manual.*

By placing your mouse over any of the boxes shown above will display a tooltip with additional information regarding the patient. This includes their ID number and Reference number.

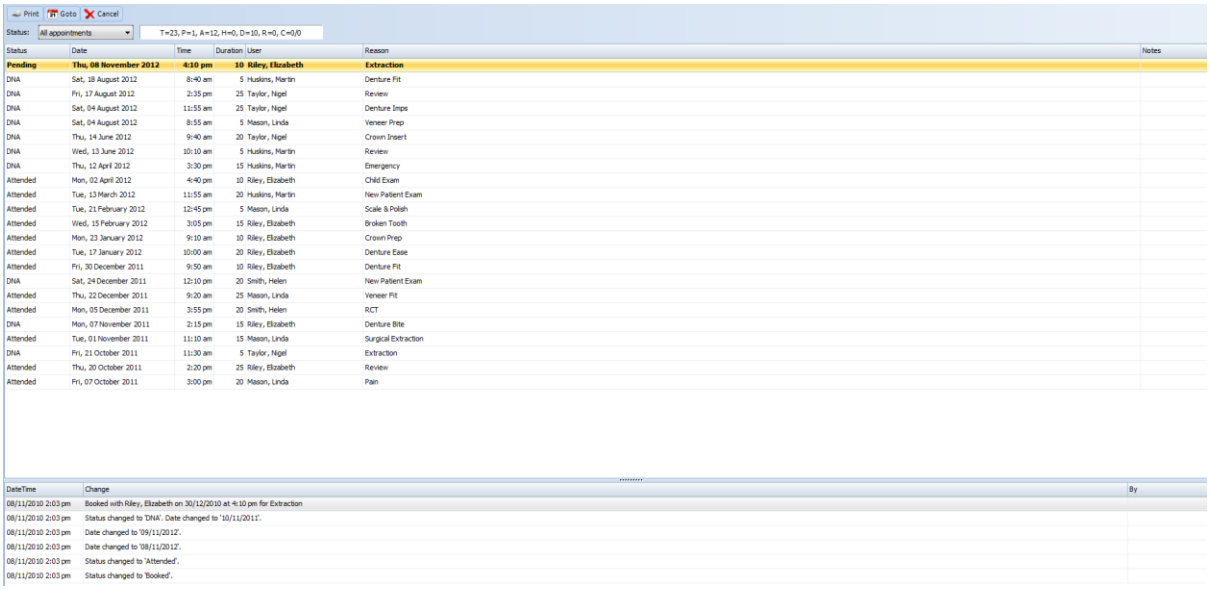
Patient Appointment History

It is important to a dental practice to monitor the attendance of patients; your dental software should ensure this is a simple process. Therefore SFD v6 keeps a detailed log of all appointments, including any changes made to original bookings.

To access this information, open the desired patient (refer to **Opening patient records** section of the manual). Once you are within the patient's record you will be presented with a row of buttons across the top of the screen.

The button for accessing the patient's appointment history is shown below.

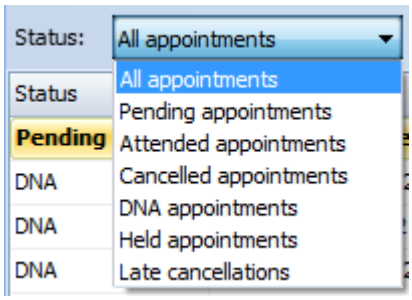
You will then be presented with a screen similar to the one below.



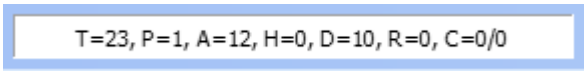
Status	Date	Time	Duration	User	Reason	Notes
Pending	Thu, 08 November 2012	4:10 pm	10	Riley, Elizabeth	Extraction	
DNA	Sat, 18 August 2012	8:40 am	5	Huskins, Martin	Denture Fit	
DNA	Fri, 17 August 2012	2:35 pm	25	Taylor, Nigel	Review	
DNA	Sat, 04 August 2012	11:55 am	25	Taylor, Nigel	Denture Imps	
DNA	Sat, 04 August 2012	8:55 am	5	Mason, Linda	Veneer Prep	
DNA	Thu, 14 June 2012	9:40 am	20	Taylor, Nigel	Crown Insert	
DNA	Wed, 13 June 2012	10:10 am	5	Huskins, Martin	Review	
DNA	Thu, 12 April 2012	3:30 pm	15	Huskins, Martin	Emergency	
Attended	Mon, 02 April 2012	4:40 pm	10	Riley, Elizabeth	Child Exam	
Attended	Tue, 13 March 2012	11:55 am	20	Huskins, Martin	New Patient Exam	
Attended	Tue, 21 February 2012	12:45 pm	5	Mason, Linda	Scale & Polish	
Attended	Wed, 15 February 2012	3:05 pm	15	Riley, Elizabeth	Broken Tooth	
Attended	Mon, 23 January 2012	9:10 am	10	Riley, Elizabeth	Crown Prep	
Attended	Tue, 17 January 2012	10:00 am	20	Riley, Elizabeth	Denture Ease	
Attended	Fri, 30 December 2011	9:50 am	10	Riley, Elizabeth	Denture Fit	
DNA	Sat, 24 December 2011	12:10 pm	20	Smith, Helen	New Patient Exam	
Attended	Thu, 22 December 2011	9:20 am	25	Mason, Linda	Veneer Fit	
Attended	Mon, 05 December 2011	3:55 pm	20	Smith, Helen	RCT	
DNA	Mon, 07 November 2011	2:15 pm	15	Riley, Elizabeth	Denture Bite	
Attended	Tue, 01 November 2011	11:10 am	15	Mason, Linda	Surgical Extraction	
DNA	Fri, 21 October 2011	11:30 am	5	Taylor, Nigel	Extraction	
Attended	Thu, 20 October 2011	2:20 pm	25	Riley, Elizabeth	Review	
Attended	Fri, 07 October 2011	3:00 pm	20	Mason, Linda	Pain	

DateTime	Change	By
08/11/2010 2:03 pm	Booked with Riley, Elizabeth on 30/12/2010 at 4:10 pm for Extraction	
08/11/2010 2:03 pm	Status changed to 'DNA'. Date changed to '10/11/2011'.	
08/11/2010 2:03 pm	Date changed to '09/11/2012'.	
08/11/2010 2:03 pm	Date changed to '08/11/2012'.	
08/11/2010 2:03 pm	Status changed to 'Attended'.	
08/11/2010 2:03 pm	Status changed to 'Booked'.	

This shows a historic list of appointments. There is also a filter for **Status**.



You also have an appointment summary at the top of your screen.



The letters in the appointment summary stand for the following:

T = X **TOTAL** number of appointments.

P = X number of **PENDING** appointments.

A = X number of **ATTENDED** appointments.

H = X number of **HELD** appointments.

D = X number of **DNA** (Did Not Attend) appointments.

R = X number of **REQUIRED** appointments (appointments needed to finish treatment that are not booked).

C =X/X number of **PATIENT CANCELLED / PRACTICE CANCELLED** appointments.

The summary is very helpful to gain an insight to appointment behaviour of a given patient at a glance.

Shown below is an example of a few entries in the appointment history.

DNA	Fri, 21 October 2011	11:30 am	5	Taylor, Nigel	Extraction
Attended	Thu, 20 October 2011	2:20 pm	25	Riley, Elizabeth	Review
Attended	Fri, 07 October 2011	3:00 pm	20	Mason, Linda	Pain

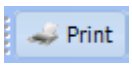
Going from left to right you are presented with the status of the appointment, the date, time, duration, performer, followed by the appointment reason. You also have a notes column in the far right of the screen.

Also when you select a particular entry, the **Changes** section towards the bottom of the screen is activated.

DateTime	Change
08/11/2010 1:55 pm	Attended
08/11/2010 1:55 pm	Date changed to '21/10/2011'.
08/11/2010 1:55 pm	Date changed to '20/10/2011'.

This section of the screen shows the date and time when the appointment was changed as well as the date the appointment was changed to. There is also a column in the far right of the screen showing which user was logged in when the change was made.

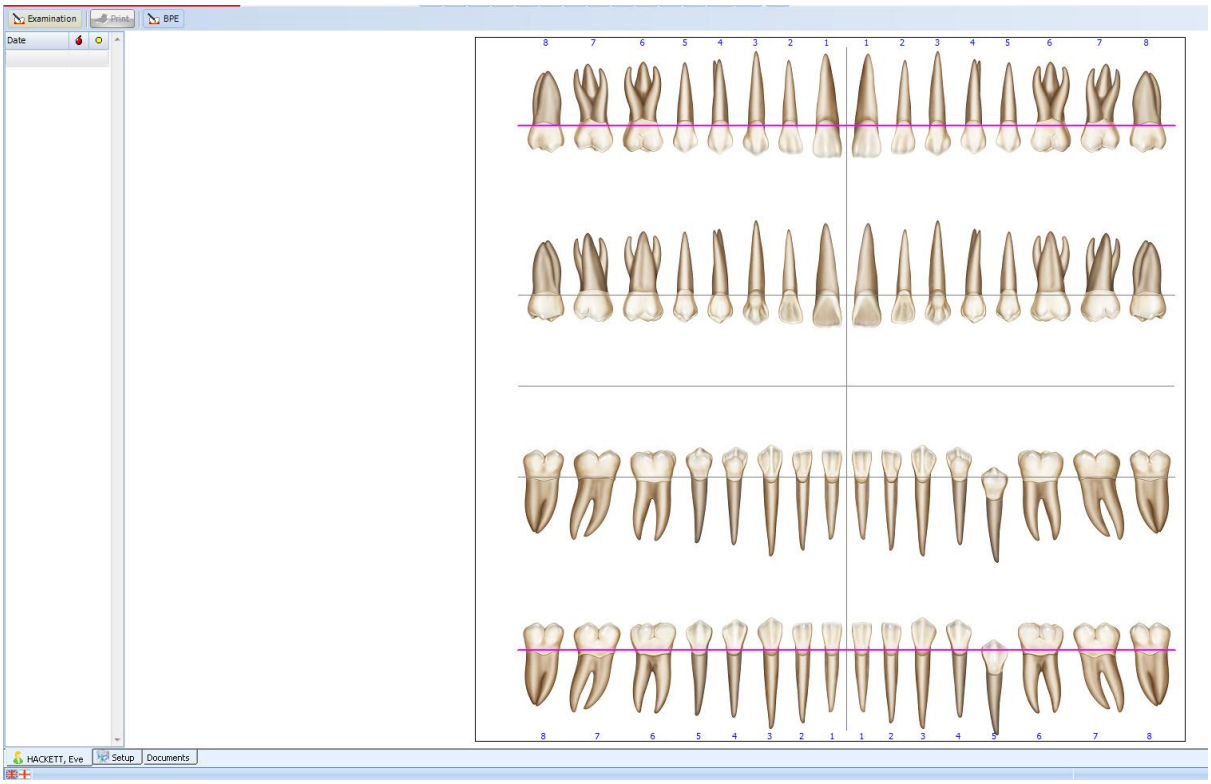
Note: *You have the ability to print the patient appointment history. Click on the* ***Print*** *button towards the top left of the screen.*



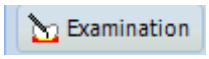
Periodontal Examinations

The next button along is used for recording **Periodontal** examinations. To enter this screen, click on the shown button below.

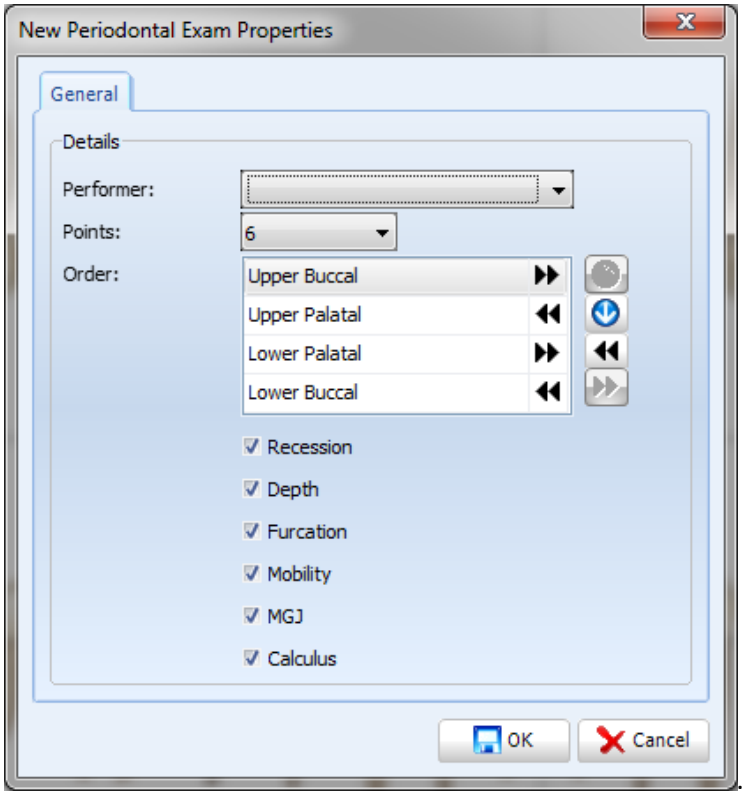
You will be presented with the following screen.



To record an examination, click on the **Examination** button.



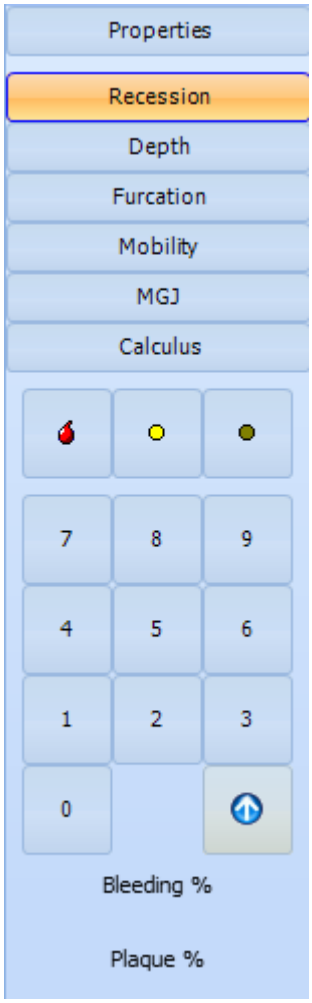
Once you have clicked the **Examination** button, the **New Periodontal Exam Properties** window appears.



From this window you can select the properties of your periodontal examination. The first option in this window is the performer. Click on the dropdown list and select the desired performer. Next, you have the options for points, again click on the dropdown and select the number of points you wish to examine. After points, you have the ability to choose the order you wish to carry out your exam. Change the order of surfaces by clicking on the surface then use the up and down button. You also have the ability to change the direction. To do this, select the surface and use the directional arrows. Finally you have a range of check boxes, tick the boxes you wish to include in your exam. Once you have made your selections click **OK**.

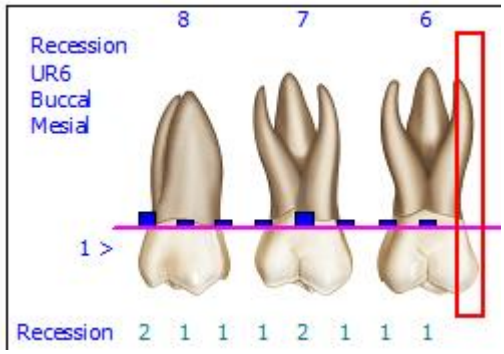
Note: *You can change the default properties if you wish (refer to the Program Setup section of the manual).*

Now you can begin to take your recordings. You will notice that the section on the left hand side of the screen is now activated.

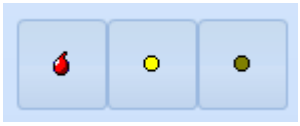


What you are examining is highlighted in orange, so from this example we are examining recession. To choose what you want to record, click on the option.

To enter information onto the chart use the numbers on your keyboard or select the number from the panel on the left of your screen. The system indicates the point on the chart you entering information for by a red box.

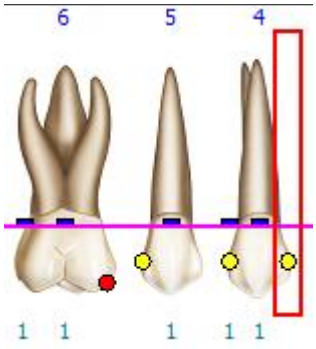


Click the buttons in the panel to denote bleeding, plaque and suppuration.

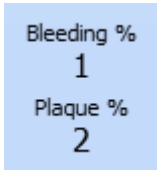


Red = bleeding. Yellow = plaque. Green = suppuration.

Once you click the buttons they are displayed on the chart as follows, these buttons act as a toggle, as such clicking the button again will reverse the previous action whilst in the same location.

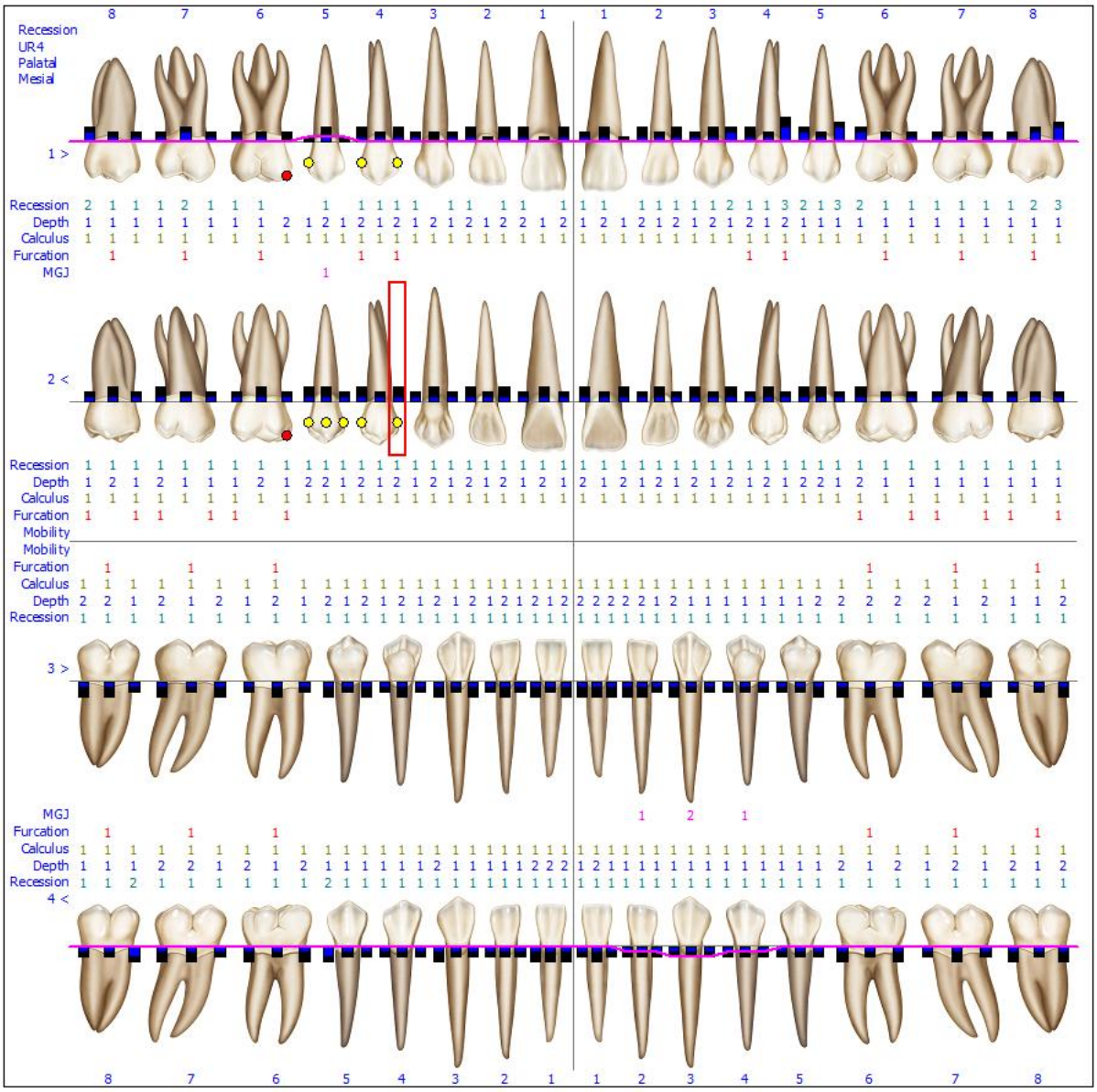


As you add bleeding and plaque the system automatically updates the bleeding and plaque percentages, this is based on the number of teeth present (and/or implants) as well as the total number of points being recorded within the examination.



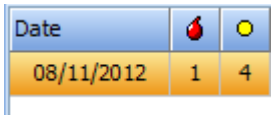
Note: *You also have the ability to navigate to any tooth by using your mouse and clicking on the desired tooth, for measurements in excess of 9mm, hold shift and press the second digit of your measurement on the keyboard. Example: Shift + 2 = 12mm.*

Your periodontal examination will look something like the following once complete.



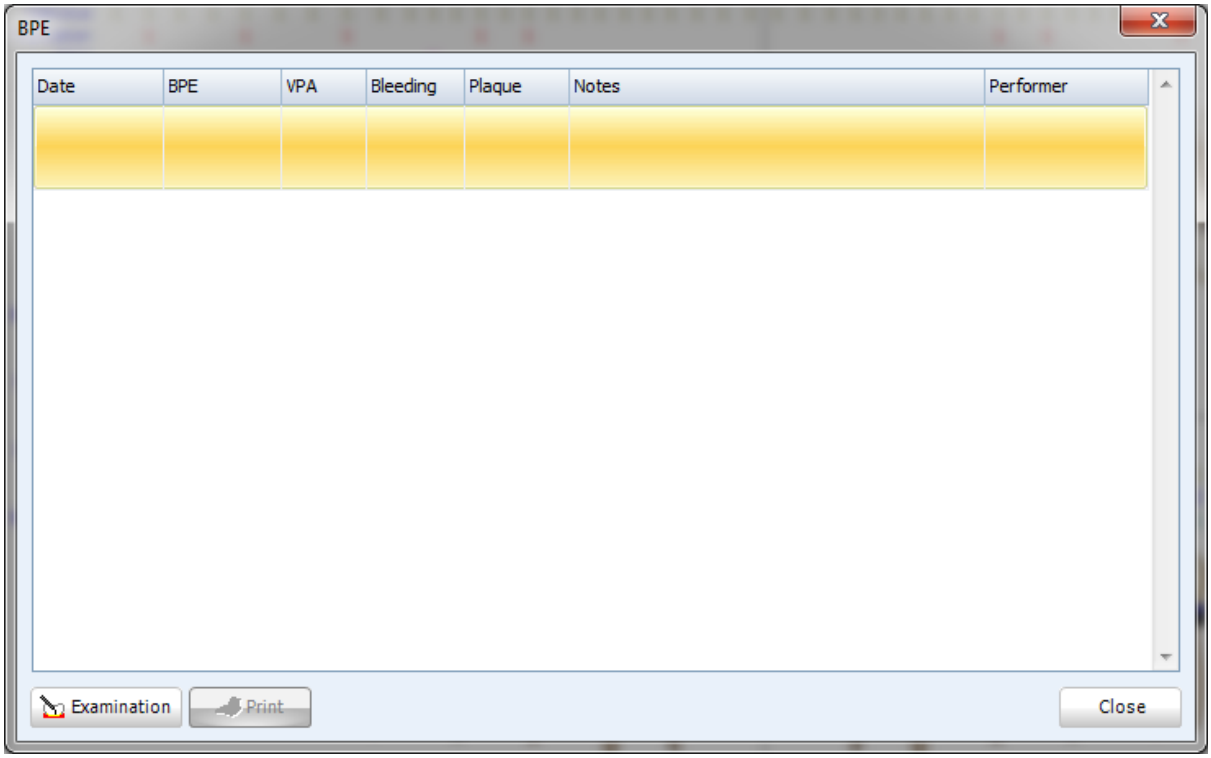
Once you have finished your periodontal examination, click **Save** in the top left of your screen.

The periodontal examination will now be stored. You can see all historic examinations in the panel down the left hand side of the screen. The system shows the date of the exam followed by the bleed and plaque % (example below).

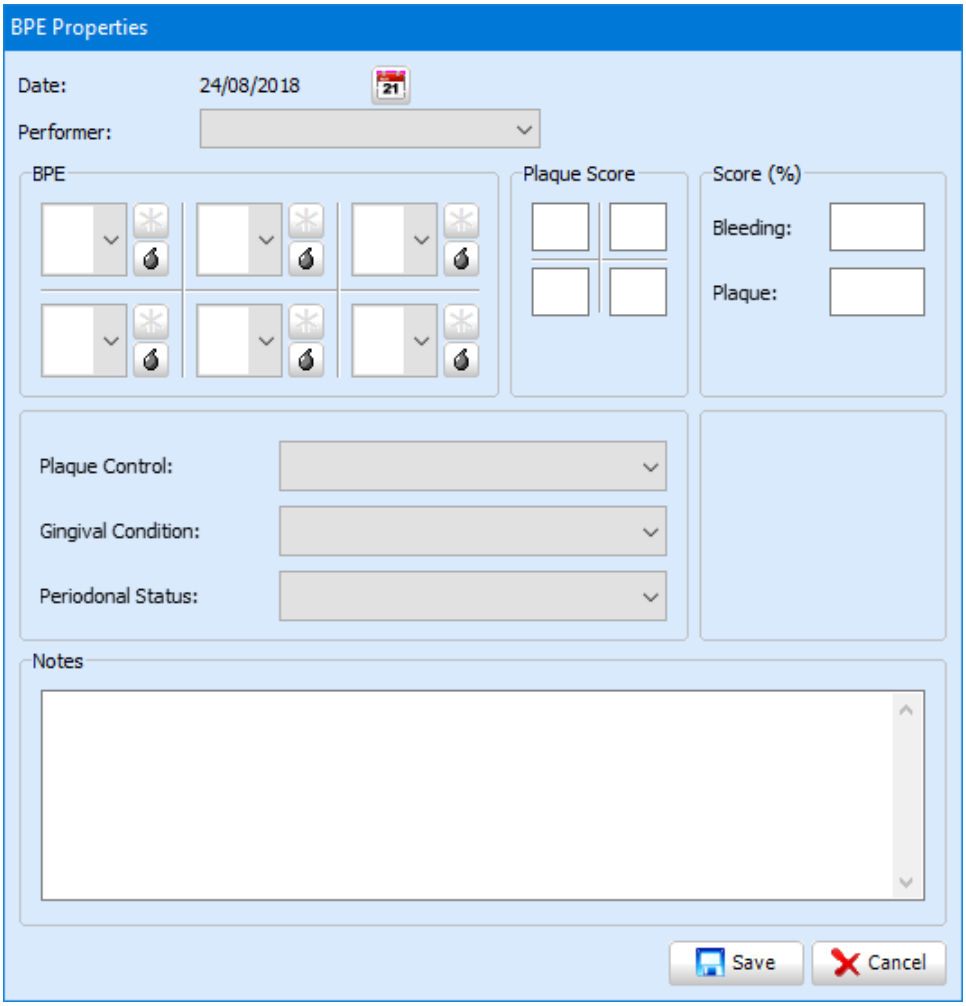


From the Periodontal screen you can also perform a basic periodontal examination (BPE). To do this, click on the **BPE** button.

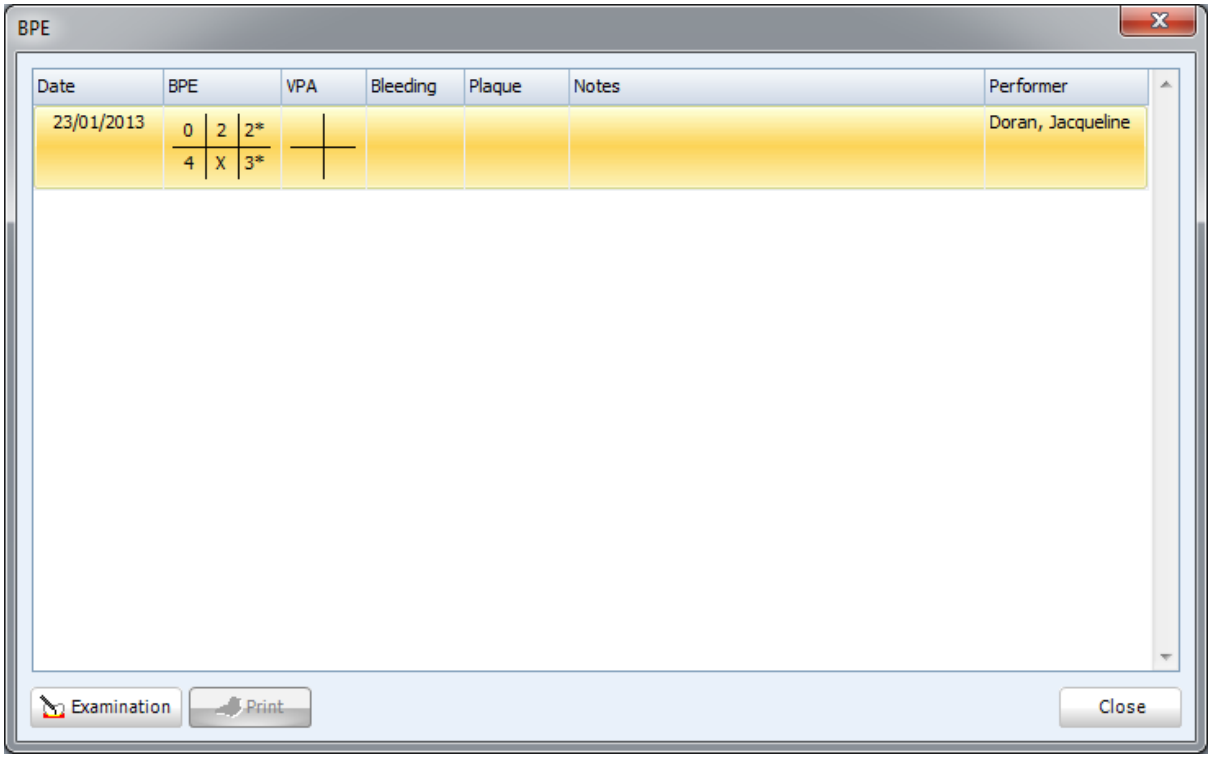
The following window will now appear.



This window shows all historic BPE's recorded in your dental software. To record a new examination, click on the **Examination** button in the bottom left of the screen. The window below appears.



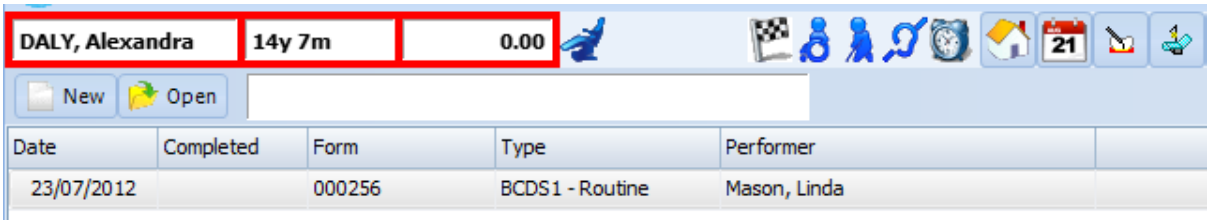
By default, the system will display the current date. To change this, click on the calendar button and select the desired date. Then select the performer from the dropdown menu. The next step is to enter your results into the BPE and plaque sections, enter the figure on your keyboard. Finally you can input any notes you may wish to include. Click **Save** in the bottom right of the window once you have completed your BPE. Once you click **Save** it will be stored in the original BPE window (example below).



Treatment

The treatment section of the patient record stores all historical and current treatment plans. To navigate to this section of the patient's record, click on the **Treatment** button.

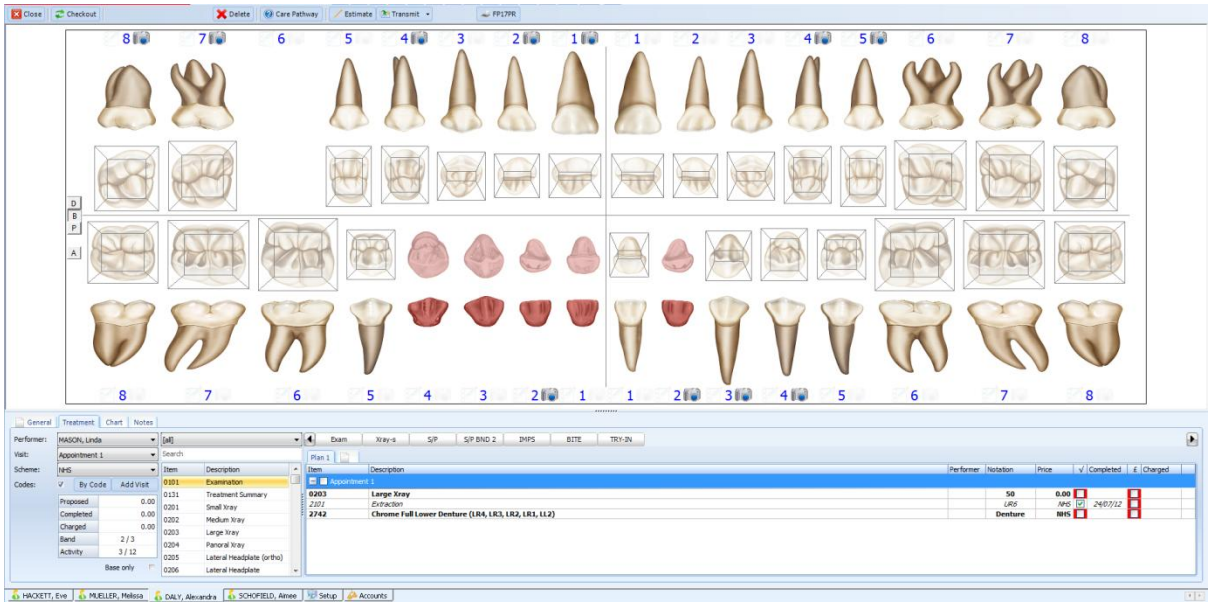
When you first click the **Treatment** button you will be presented with any existing forms (example below).



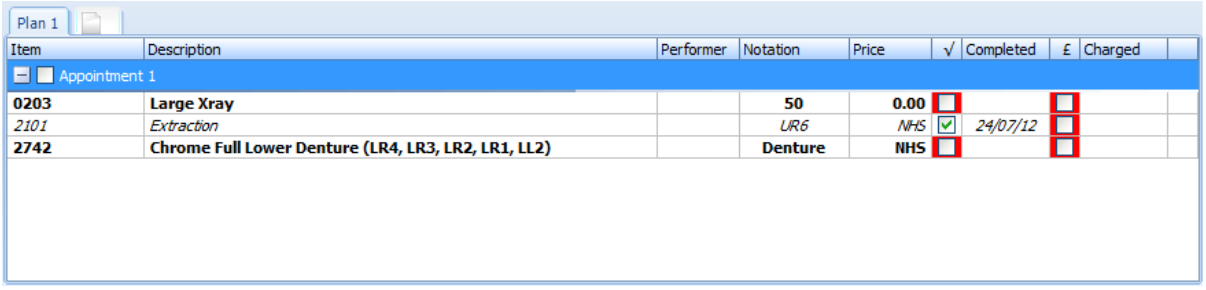
In this example the patient Alexandra Daly has had one previous course of treatment opened on the 23/07/2012. The form number, type of treatment and performer is also displayed. Note that there is

no completion date this indicates that the treatment course is still open. You can also tell this by the patient flag at the top of the screen (highlighted below).

To open a historic form either double click on the desired form or alternatively, left click once on the form and click the **Open** button towards the top of the screen. Now you have opened the treatment form you will be presented with the screen below.



Within the treatment form you will see the treatment items that have been completed or proposed.



Plan 1

Item	Description	Performer	Notation	Price	√	Completed	£	Charged
Appointment 1								
0203	**Large Xray**		**50**	**0.00**	☐		☐	
2101	*Extraction*		*UR6*	*NHS*	☑	*24/07/12*	☐	
2742	**Chrome Full Lower Denture (LR4, LR3, LR2, LR1, LL2)**		**Denture**	**NHS**	☐		☐	

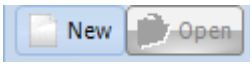
From the example above you can see the patient has a number of treatment items proposed. In this example, only one of the items has been completed. This is shown by a tick in the completed column followed by a date of completion. To mark a treatment item as completed click on the checkbox, repeating this with the charged checkbox to charge an item.

Once you have finished doing what you need to on the existing treatment form, click **Checkout** in the top left of the screen to update the patient's balance or alternatively click **Close** in the top left to update the patient's account and close the form. If all the work on this form has been completed you can also choose to complete the form by clicking on the complete button.

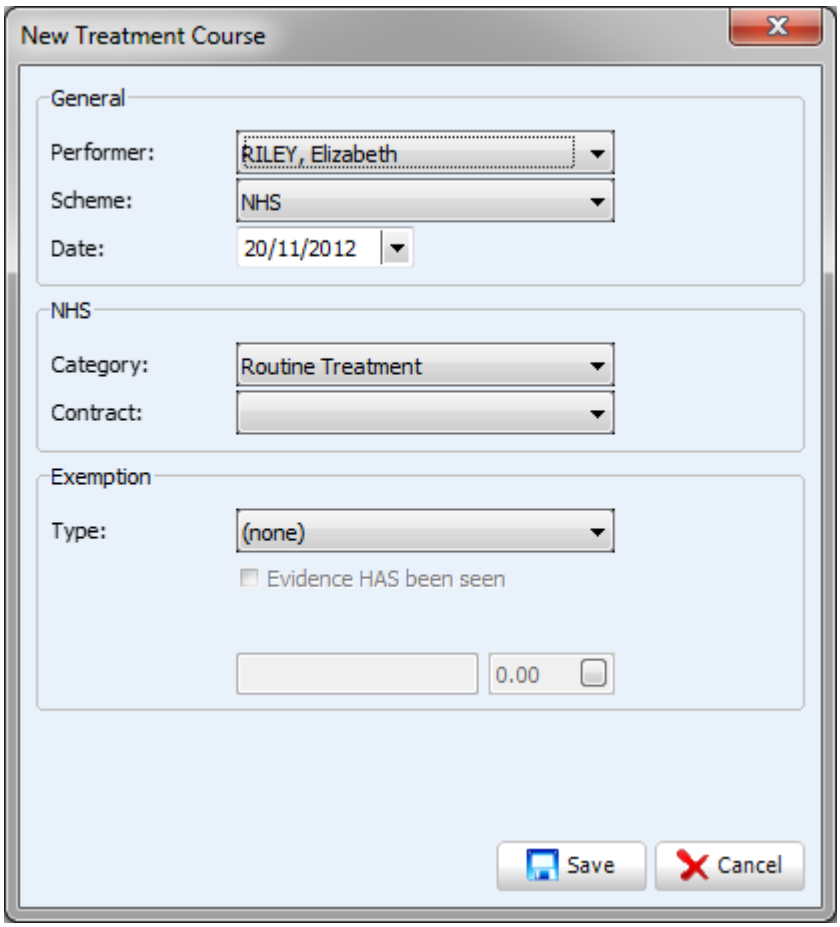
Creating a new form

To create a new treatment form, enter the treatment screen by clicking on the button below.

Once you are within the treatment screen, click **New** in the top left hand corner.

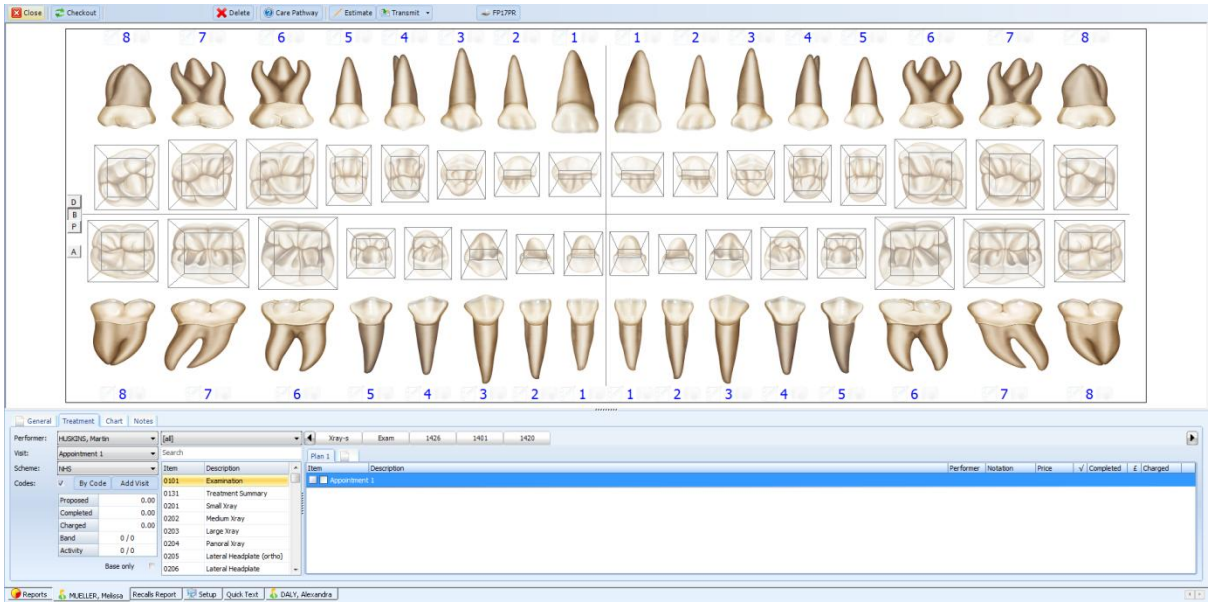


You will be presented with the **New Treatment Course** window below.

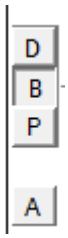


Note: *If a particular patient already has an active treatment form that hasn't been marked as completed, SFD v6 will warn you when creating a new treatment form that there is already a form open. Under certain circumstances you will be prohibited from opening an additional treatment course, for example only one NHS course can be open at a time.*

From the **New Treatment Course** window you will choose the performer, scheme and date. (If the scheme is NHS, you have the ability to choose the category of treatment and the contract it is to be completed under. In addition you can select an exemption type if necessary and mark whether evidence has been seen for this exemption). Once you have entered the necessary information click **Save** to create your new treatment form. You will be presented with the screen below.

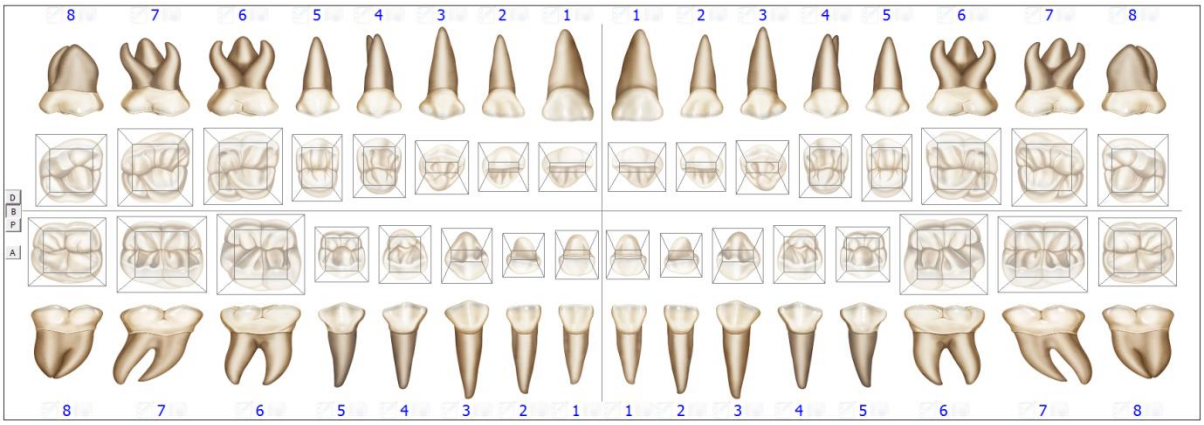


Tip: *You can change the view of your chart by clicking on the buttons towards the left of the screen.*

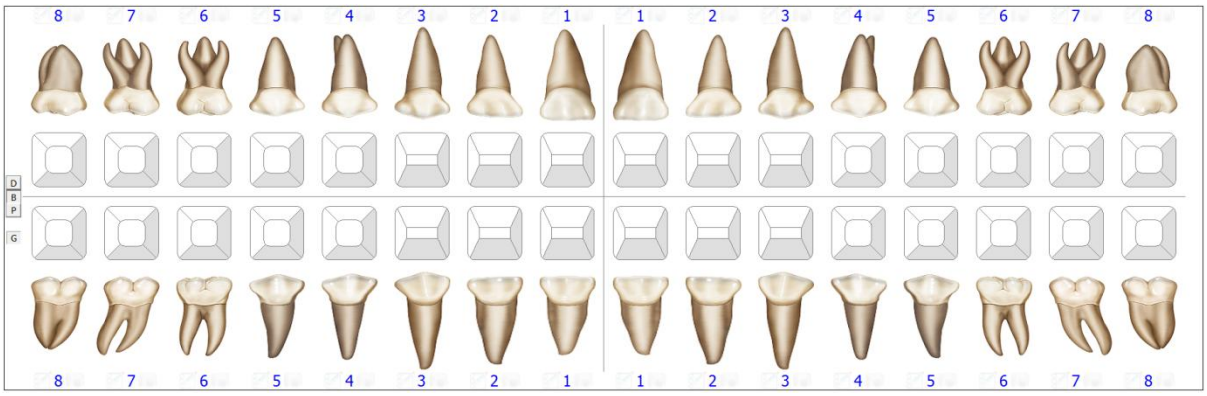


By clicking **D** you will be presented with any deciduous teeth a patient may have. By clicking **P** you will see the patient's permanent teeth. **B** displays both deciduous and permanent teeth.

Also note that by clicking **A**, this will present the chart in anatomical mode.

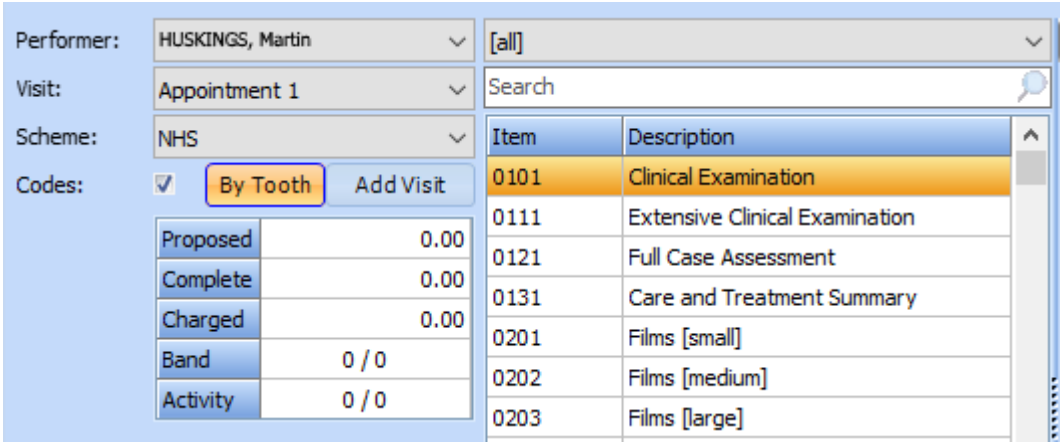


If you click **G**, the chart will be presented in graphical mode.



Tip: *You can set either of the above modes as your default in the system setup.*

By default the form opens in the **Treatment** tab.



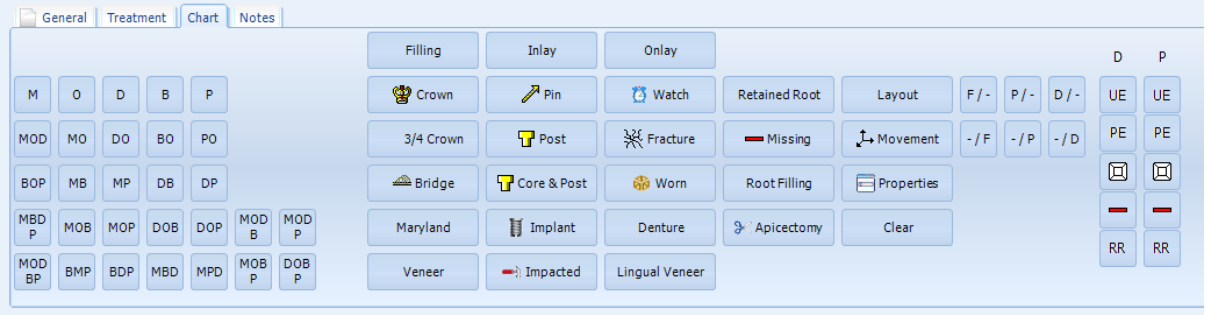
This tab displays the performer, visits (E.g. appointment 1, appointment 2) and scheme. For NHS forms, the proposed, completed, charged, band and activity columns update as various treatment items are added and completed (you can read more about adding and completing treatment items later in this chapter).

By having the checkbox adjacent to **Codes** checked, the list of treatment items will be visible (shown above).

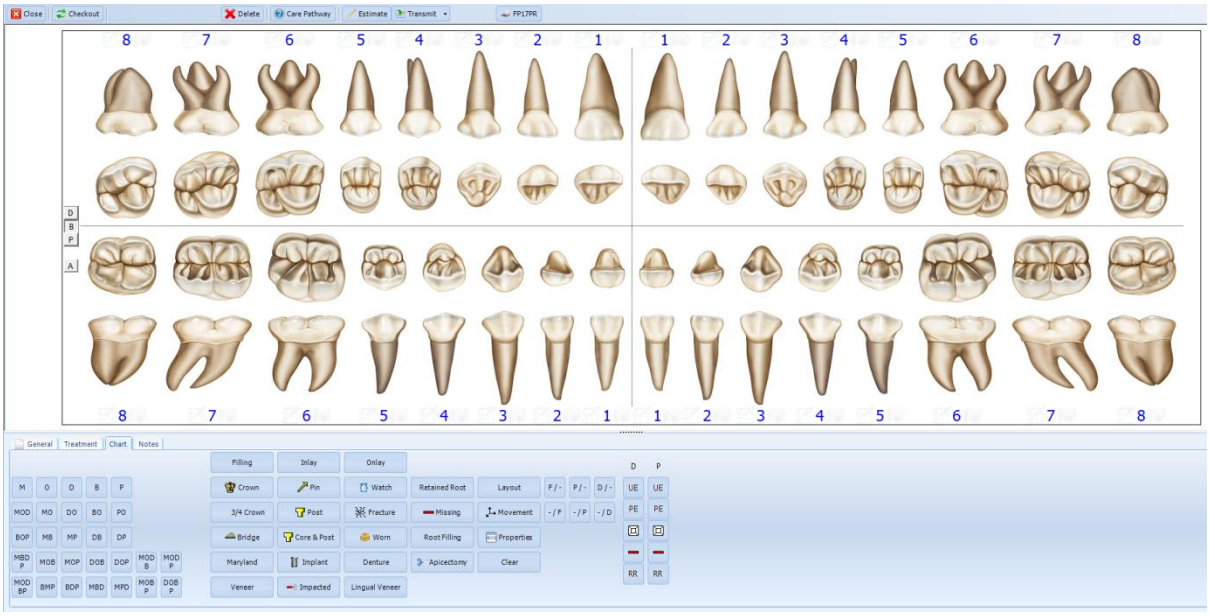
You also have the ability to add visits (appointments) from this tab. This option is useful if the patient comes in for an initial exam but needs to return for further treatment.

Adding Items to the base chart

To add items to a patient's base chart, click on the Chart tab once you have opened a treatment form.

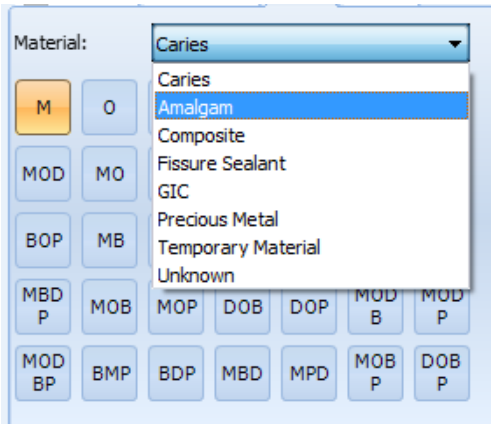


The entire base chart window is shown below.



Similar to the General tab you have the ability to view in graphical or anatomical mode.

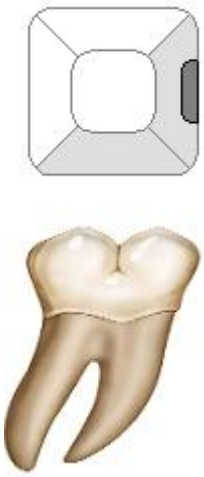
There are a few methods available for adding fillings to the base chart. In the bottom left hand side of the base chart screen you will see all of your fillings options.



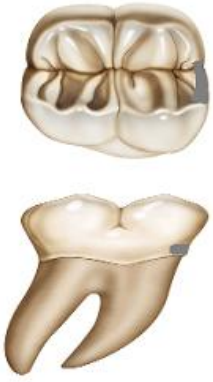
If you wanted to add a mesial filling to the chart, click on **M** from the fillings options. By clicking on **M** this will activate the **Material** dropdown list.

Once you have selected the material from the dropdown, click on the tooth on the chart you wish to add the filling to.

The following is an example of an amalgam mesial filling, shown in the **graphical** mode.



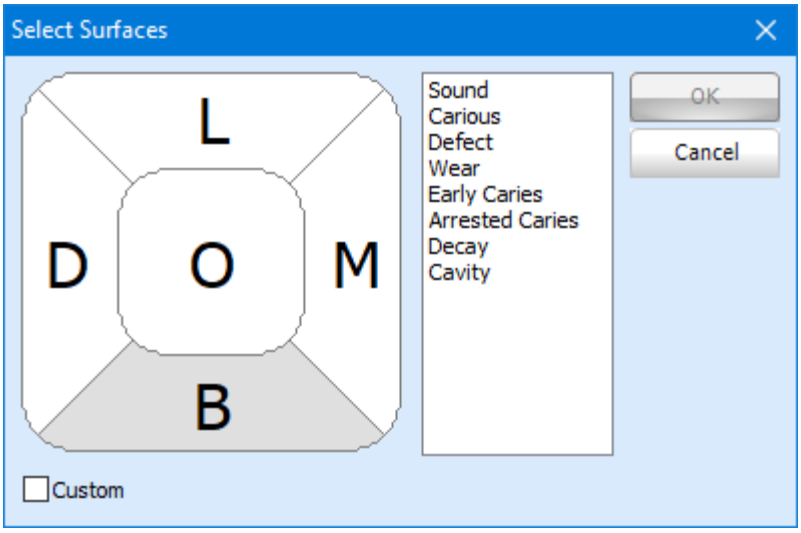
The following is an example of an amalgam mesial filling, shown in the **anatomical** mode.



You would repeat this process for any other fillings you wish to add to the base chart.

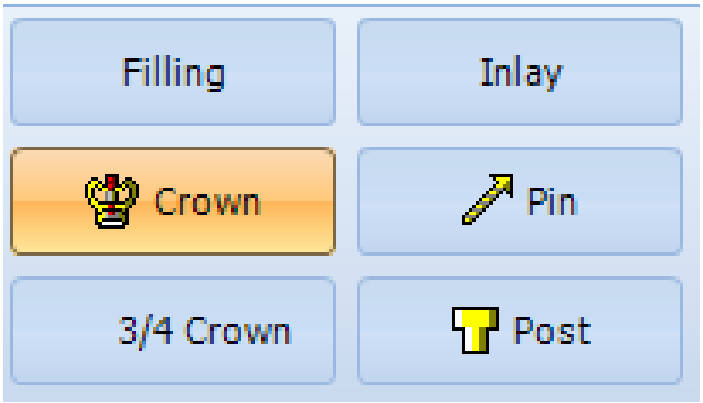
Alternatively for fillings, you can use the Filling button.

Click the **Filling** button and select the material then click on the tooth you wish to add the filling to. You will be presented with the screen below.

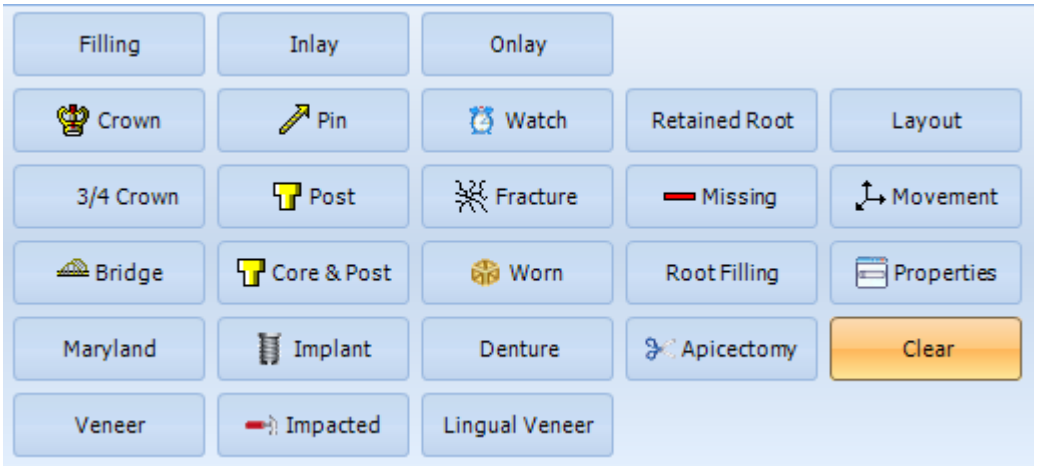


Click on the surfaces you wish to add the filling to, areas you select will be presented in green, so in the example above the patient has had an MOD filling.

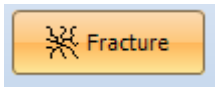
It is as easy to add other treatment items to the base chart as it is to add fillings. For example to add a crown, click on the **Crown** button from the menu, choose the material from the dropdown, then select the tooth from the chart that the crown needs to be added to (process shown below).



Tip: *To remove anything from the base chart that may have been added by mistake click on the Clear button from the menu then click on the tooth the treatment item is to be removed from.*

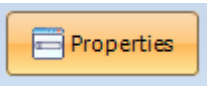


Observations can also be added to the base charts such a fracture, impacted or worn. Select from the menu and click on the affected area of the tooth (example below).

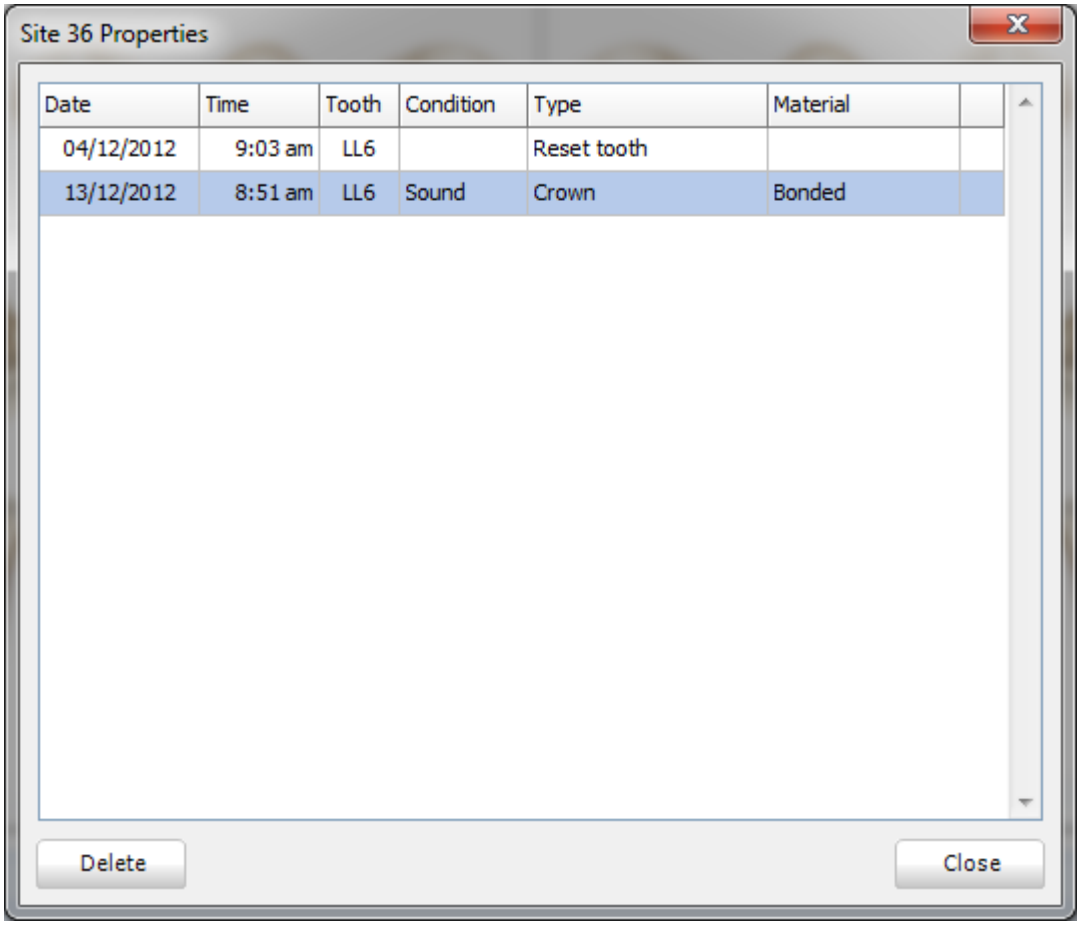


The example above shows a fracture on the lower right 6.

Tip: *To see anything that has been added to a particular tooth, click the properties button then click on appropriate tooth (example below).*

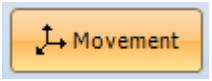


After clicking on the tooth, the following window appears.

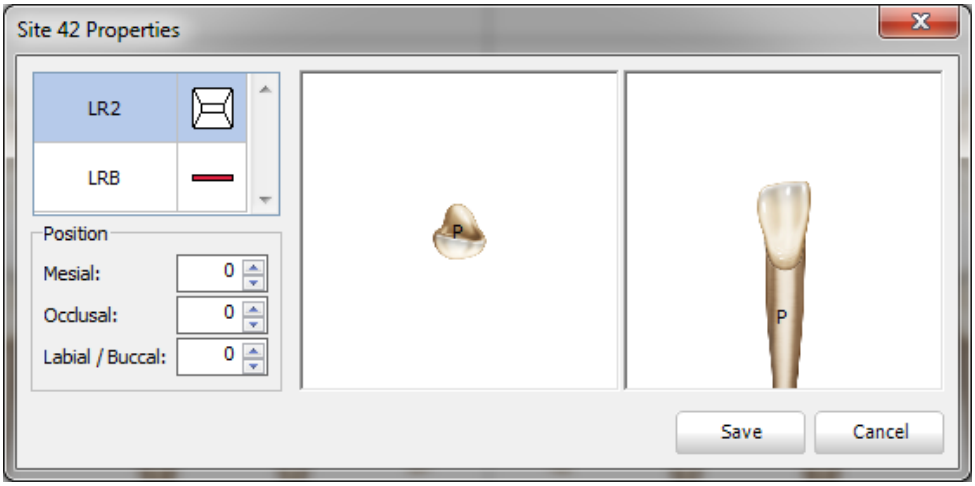


There also is a **Delete** button in this window. To remove anything added in error highlight the item that needs removed by clicking on it, then click the **Delete** button in the bottom left of the screen.

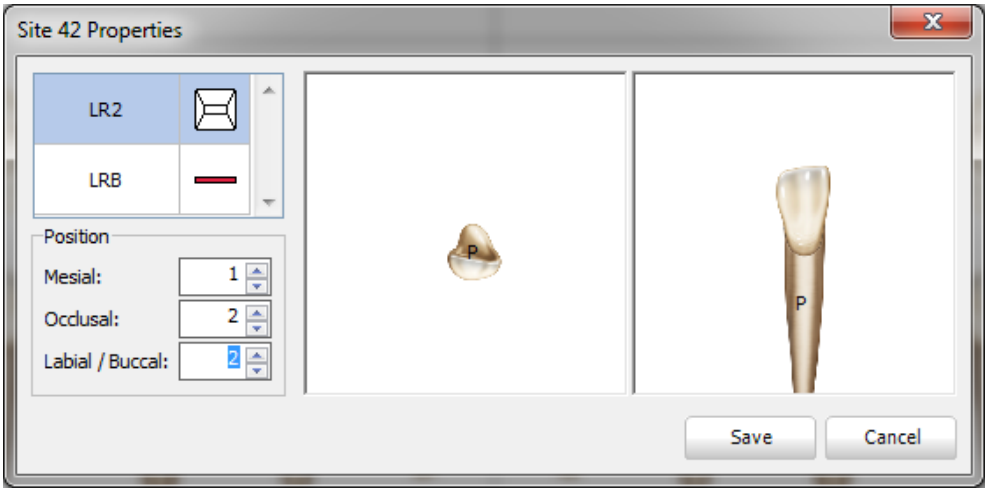
On the base chart it is also possible to add any movement that may have occurred to a particular tooth. Click the **Movement** button from the menu and select the tooth from the chart you wish to add movement to.



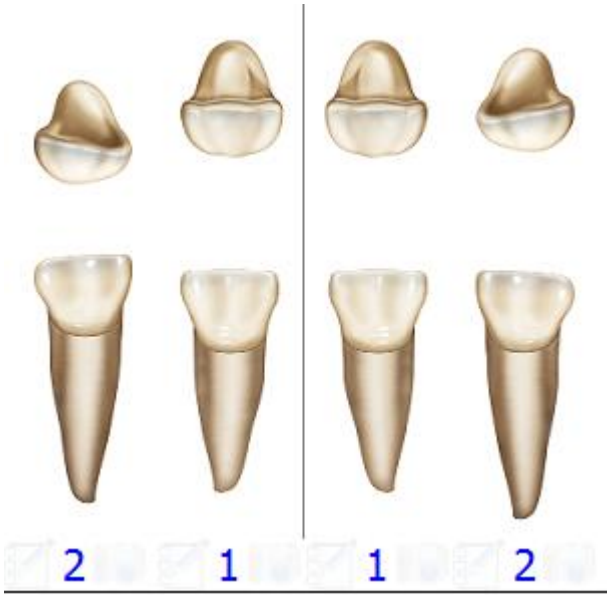
After clicking **Movement** the following window appears.



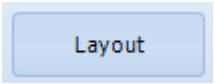
In this particular example you can see it's on the LR2 and the LRB is not present (indicated by red horizontal line). From the **Position** section of this window there is the ability to add Mesial, Occlusal, and Labial / Buccal movement. The tooth will physically move within this window as the values are updated.



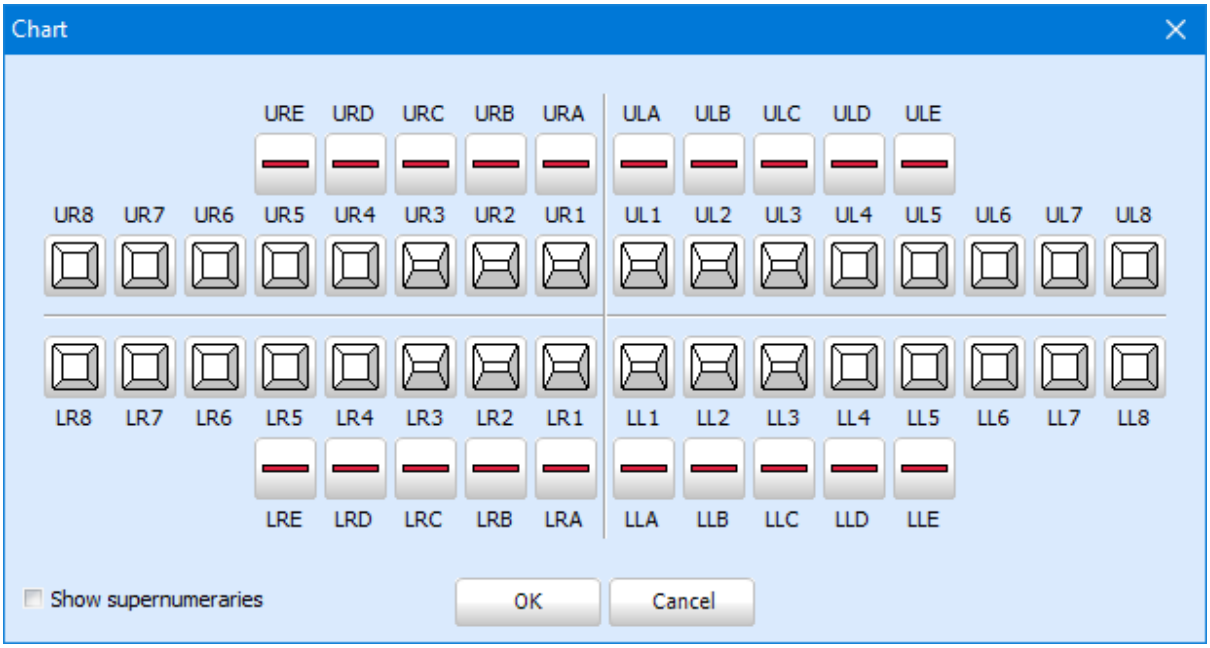
Click the **Save** button once you are happy with the values recorded. Notice that this tooth's position has moved appropriately on the base chart.



From the base chart it is important to state the layout of teeth, stating any deciduous and permanent teeth a patient may have. Click on the layout button to do this.

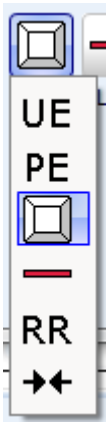


The following window appears.

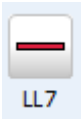


The vertical red line shows that the tooth is not present. Therefore in the example above the patient has a full set of permanent teeth and the deciduous teeth are no longer present.

To change the current state of a tooth, click on the icon and the following menu appears. In our first example we are going to mark a tooth as missing.



You have the option to mark the tooth as Un-erupted, Partially-erupted, missing, Retained Root, and Closed Gap. To mark the tooth as missing, click on the **vertical red line**. On the layout screen it is now shown as missing.



Click **OK** on the Layout window. You will now see that the tooth is now longer present on the base chart.

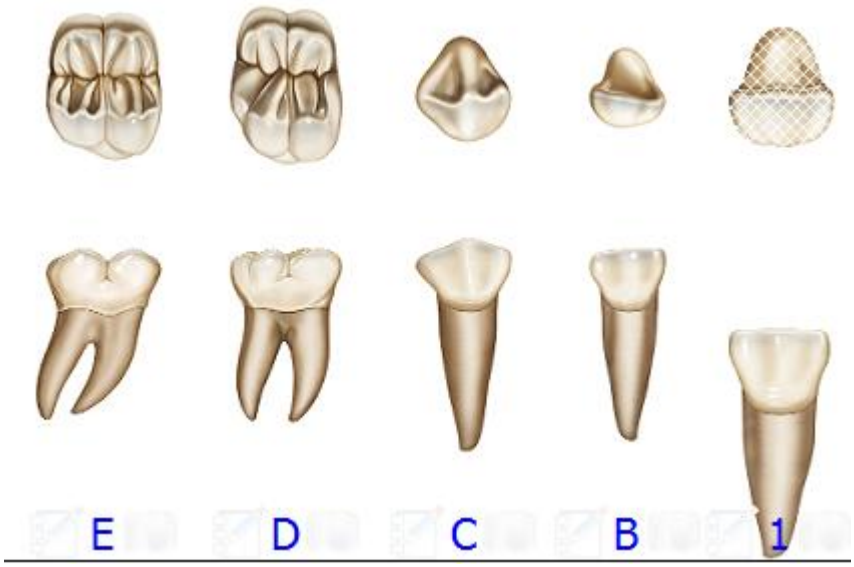
Partially erupted teeth are common in children, to add this to the base chart follow the steps below.

Firstly, click on the layout button from the base chart menu. Then click on the tooth that is partially erupted.

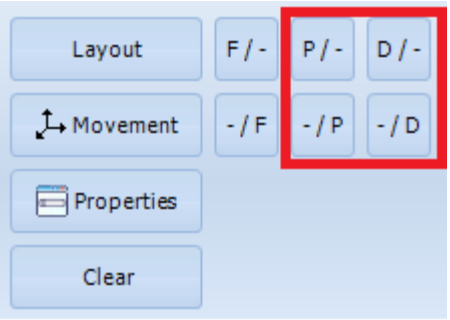
In this example the patient has lost their LRA and their LR1 is partially erupted. First of all click on the LRA and mark it as missing.

Then we can mark the LR1 as Partially Erupted.

Click **OK** on the layout screen you will now see the partially erupted LR1 on the patient's base chart.



Tip: *To save time you can chart the full upper or the full lower jaws as permanent / deciduous by one click of a button. These buttons are towards the far right of the base chart menu.*



The various buttons do the following:

Chart permanent upper

Chart permanent lower

Chart deciduous upper

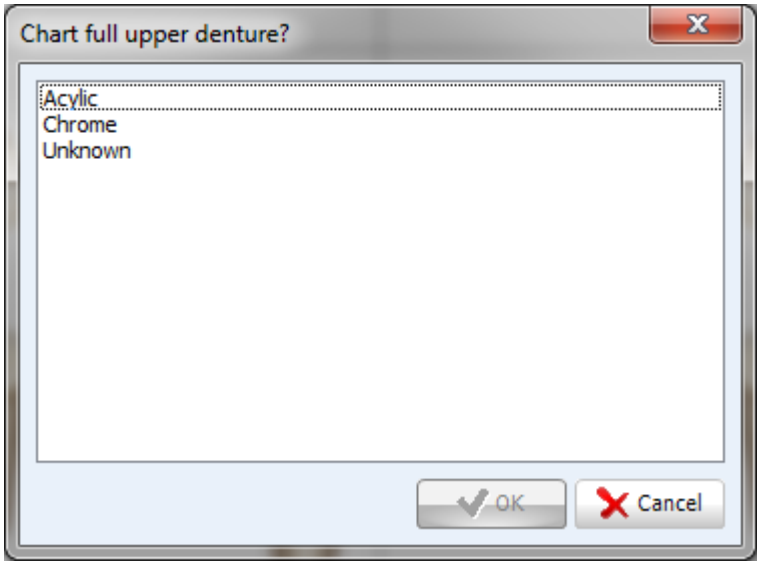
Chart deciduous lower

You also have the ability to chart full lower/upper dentures.

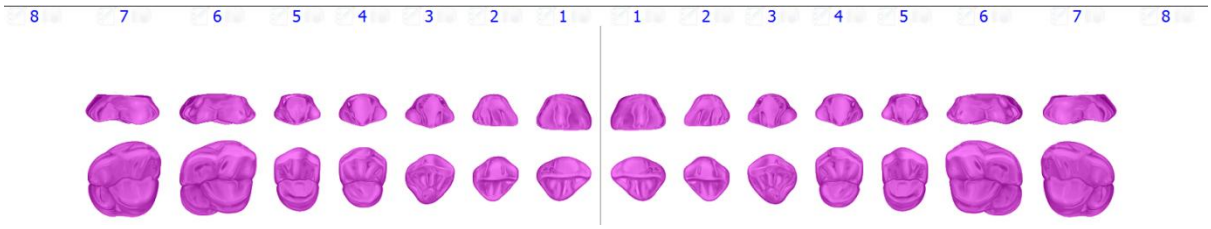
Chart full upper denture

Chart full lower denture

The following window appears once you have clicked on one of these buttons.

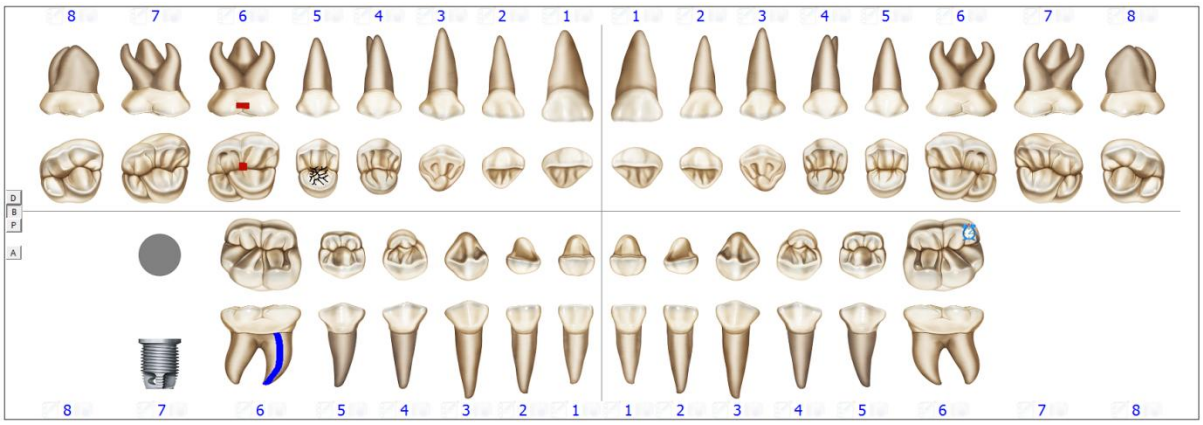


Choose your material for the denture from the list and click ok. Once you click ok, this will apply the denture to the base chart.

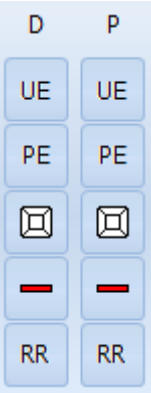


Tip: *To add a material for a denture, refer to the Setup section of the manual.*

Below is an example base chart.



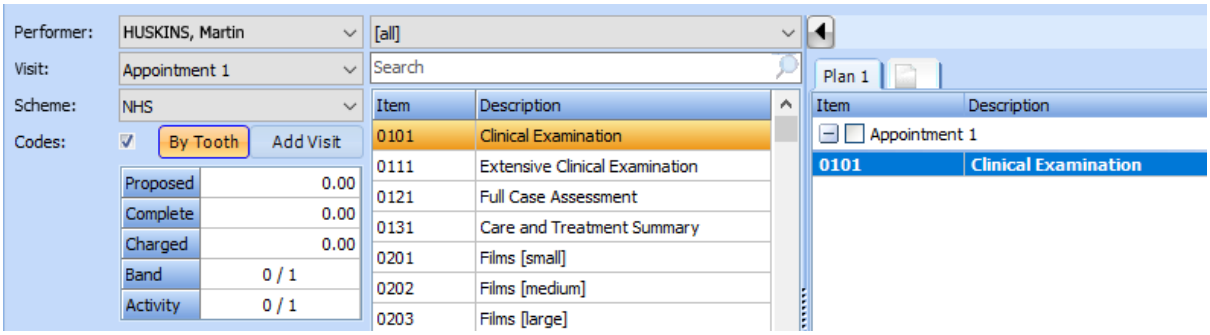
You can also you use the buttons shown below to change the layout within the base chart.



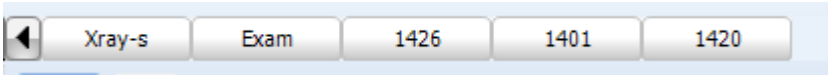
D stands for deciduous and **P** for permanent. To mark one of these options on the base chart, click on the desired button then click on the tooth on the chart.

Adding an examination to a treatment form

The most common treatment item is a clinical examination. Once you have opened a new treatment form, double click on 'Clinical Examination'.



Tip: *To make the process even quicker you can set quick codes so that you can add frequently used treatment items to a treatment form at the click of a button (quick code bar shown below).*

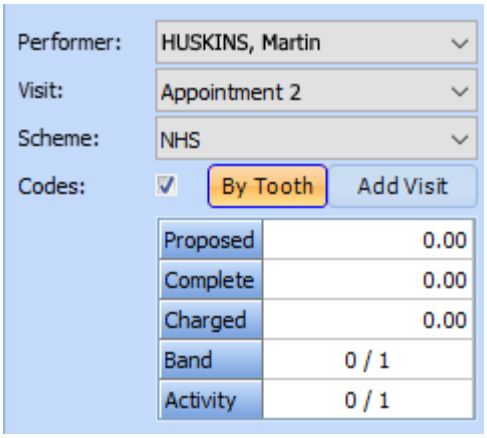


See the setup chapter of the manual to discover how to set quick codes up for each of your dentists.

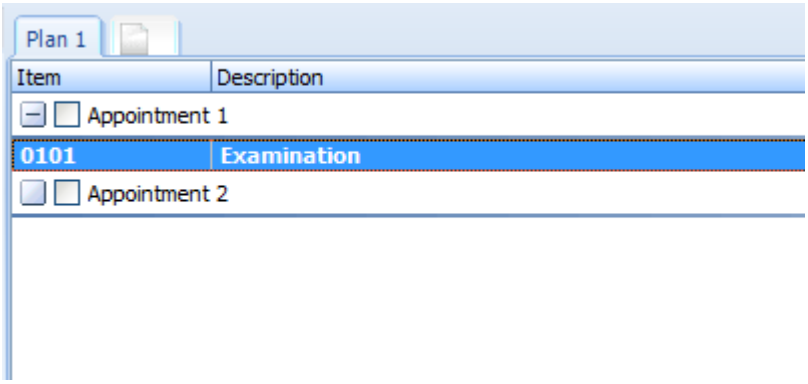
Adding additional visits (appointments) to a treatment form

After examining a patient it may be necessary to add additional visit(s) to the treatment form, if the proposed course of treatment can't be completed on the day of the examination.

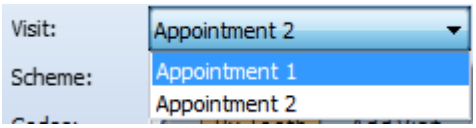
To add an additional visit, click the **Add Visit** button.



There will now be an extra visit (appointment) on your treatment form (example below). To add subsequent appointments, repeat this process.



To select the appointment you wish to add a treatment item to select the desired appointment from the dropdown button next **Visit**.



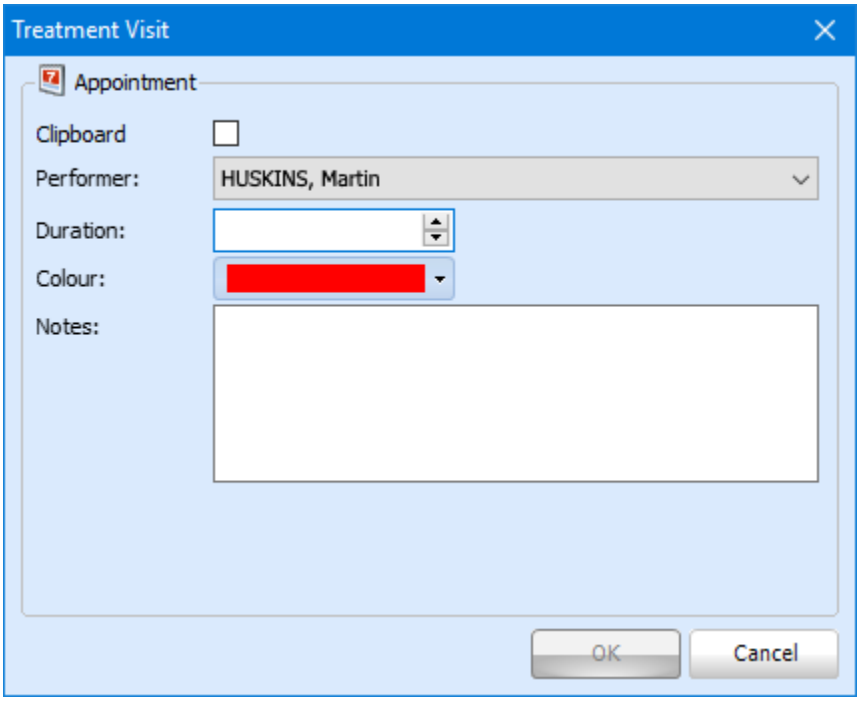
Select the treatment item you wish to add it will then appear under the appropriate appointment.

You can also drag and drop treatment items from one appointment to another. Hold the left button on your mouse down, hover over the appointment you wish to add the treatment item to, then release. This same method can be used for changing the order of appointments.

Adding additional visits to the treatment clipboard

If you need to book a patient an additional appointment, you can let the reception know this from surgery.

Double click on the **appointment**. The following window appears.



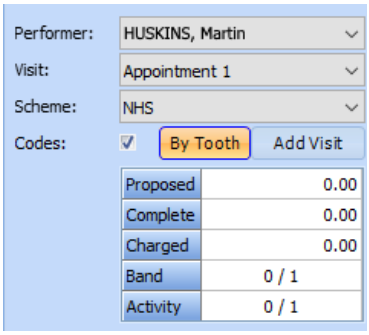
To add the appointment to the treatment clipboard tick the checkbox named **Clipboard**. You can add the duration required, assign a colour to the appointment and add any notes if required.

Once you click the **OK** button, the appointment will now be on the treatment clipboard so reception can drag and drop the appointment to the desired time slot.

Adding treatment items to a form (By tooth)

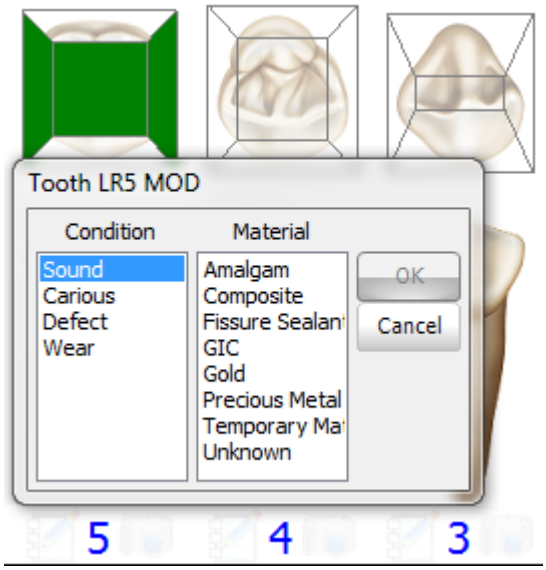
After creating a new treatment form (see creating a new form section of the manual) it will be necessary to add various treatment items. You have a choice of how you add these items. They can be added by tooth or by code.

To add treatment items by tooth, click on **By Tooth** on the screen shown below.

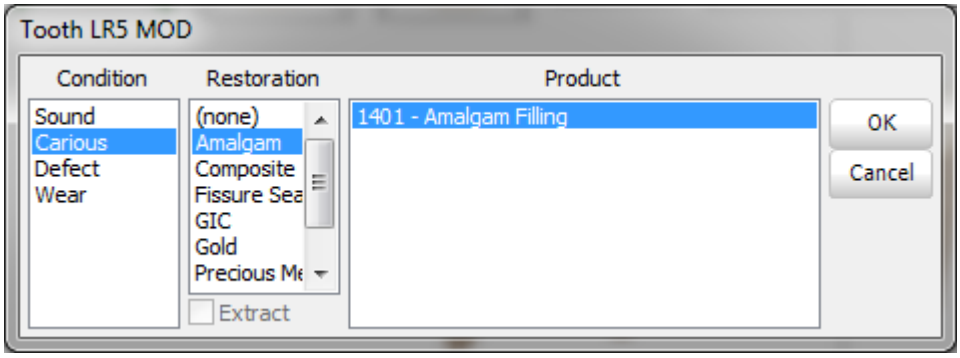


When you are in **By Tooth** mode you will notice on the chart there is a grid present over each tooth (whilst in anatomical mode), this is so you can select the necessary surface(s) of the tooth.

To add a treatment item to a tooth, click on the necessary surface(s) from the grid (example below).

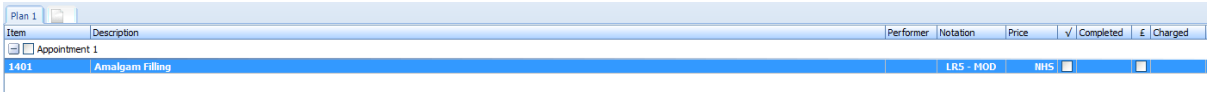


Once you have selected a surface they appear green. To deselect a surface click on the surface again, the green coloured surface will revert back to clear. From the window that appears once one or more surface(s) are checked, you can select the condition and material. To select a condition, material / restoration and product click on the option you wish to select, the option will be highlighted in blue once selected.



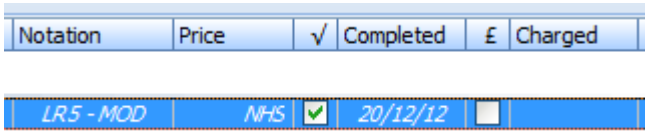
In this example the condition is Carious, we are going to use Amalgam for restoration, and from the product list we are going to select Amalgam Filling. Click **OK** to add the treatment item. You will see this is now present on the chart.

You will now see the treatment item at the bottom of the screen (example below).



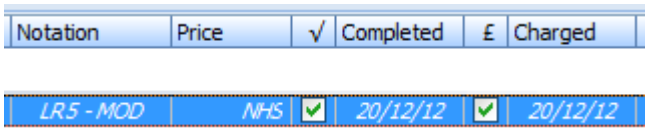
Also note that down the left hand side of the screen the activity grid has been updated (only applicable to NHS courses of treatment in England and Wales).

Once a treatment item has been completed it is necessary to mark this on the treatment form.



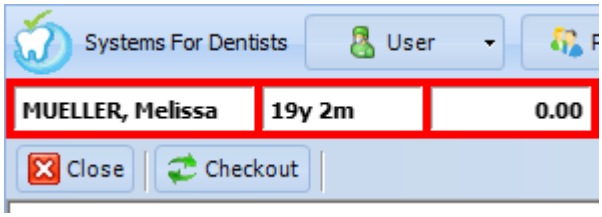
Once you tick the **Completed** checkbox it populates the completed column with the date that marked the treatment item as completed. This then updates the activity box on the left hand side.

The next step is to charge the patient for the treatment item. To do this, tick the box under the **charged** heading.

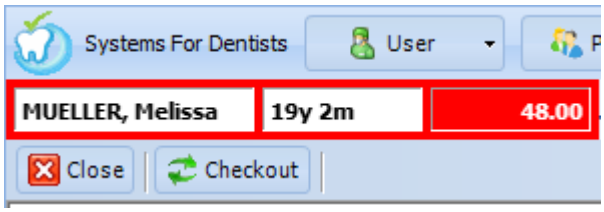


Now the item has been charged, there is a date present in the **charged** column. As for proposed and completed the activity grid will now be updated.

To update the patients account you have two options once you have ticked the c**harged box**. You can click the **Checkout** button if you wish to remain in the treatment form. Alternatively click the **Close** button. These buttons are found towards the top left of your screen (see below).



Once you have clicked either of these buttons you will notice that the patient's account balance will update (example below).

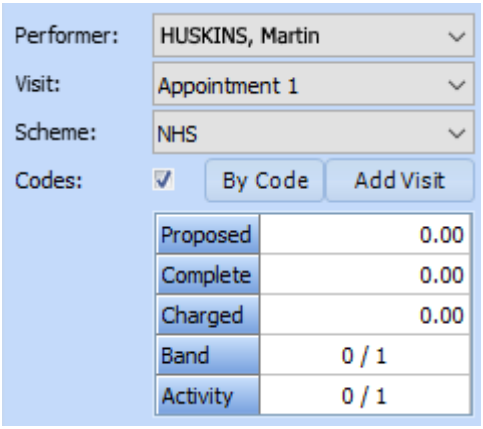


To see how to put through patient payments, refer to the Patients Accounts section of the manual.

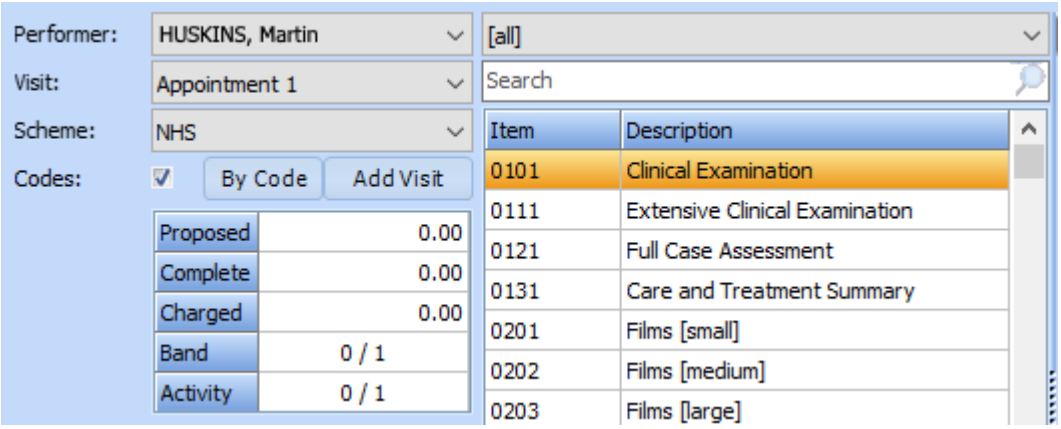
Adding treatment items to a form (By code)

The second way to add treatment items to a form is by code.

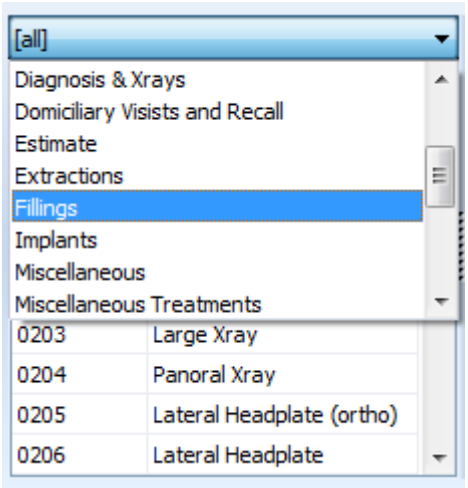
To activate this mode click on the **By Code** button towards the bottom left hand corner of the screen once you have opened a treatment form (see creating a new form section of the manual).



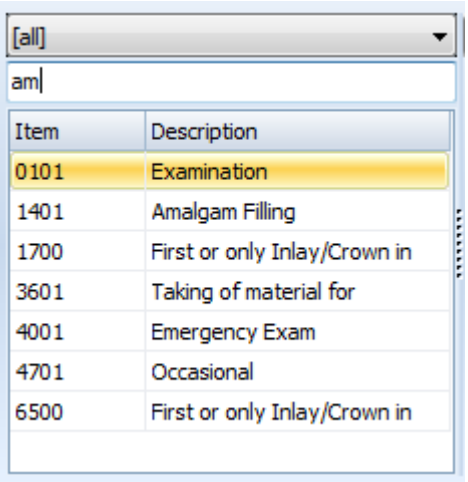
You will see the list of codes towards the bottom left of the screen.



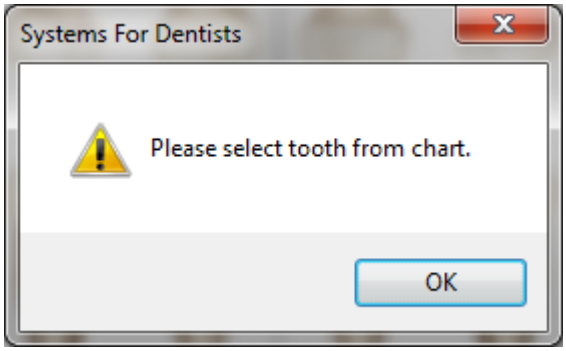
By default all codes appropriate to the current mode will be listed. If you only want to view codes for a specific category you can choose from the dropdown.



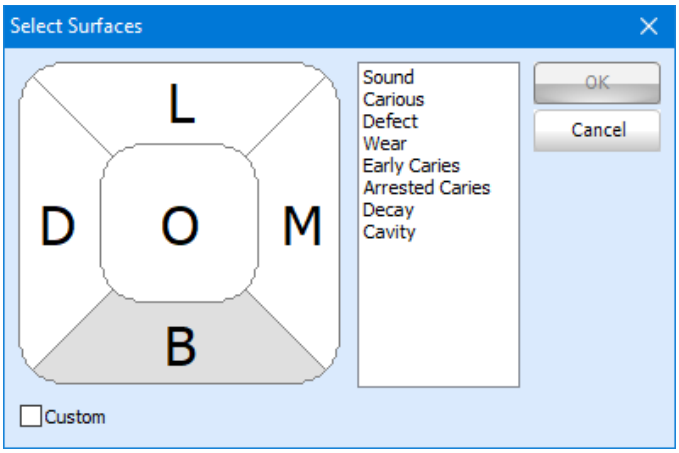
The next feature is the search filter. This is located under the category selection and can be used with it. Start typing the item or description name and the results will adapt to your search.



To add a treatment item such as an examination to the form double click on the desired item from the list. Tooth specific items such as fillings require the selection of a tooth, should you double click on one of these items the following warning will be presented.



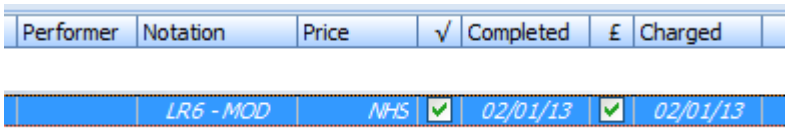
Click **OK** and select the tooth from the chart. After clicking on the tooth, the following window appears (depending on which treatment item was selected).



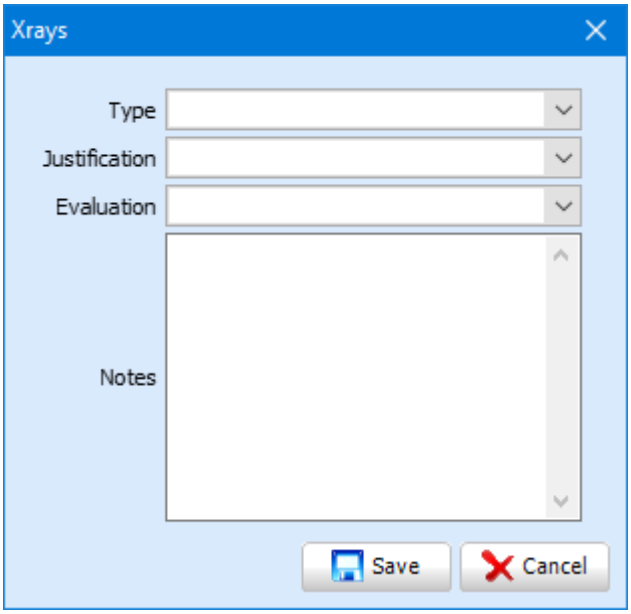
Select the surface(s) required by clicking on it. Once selected, the tooth surface(s) will turn green.

Click **OK** to confirm. This will now be added to the chart (example below).

Like the **By Tooth** section, once the treatment item has been completed and charged tick the check boxes next to the treatment item.



Tip: *If you have any treatment completion screens setup for particular treatment items they will be presented when you tick the Completed Checkbox. See the 'Setup' section of the manual to see how to configure such screens.*



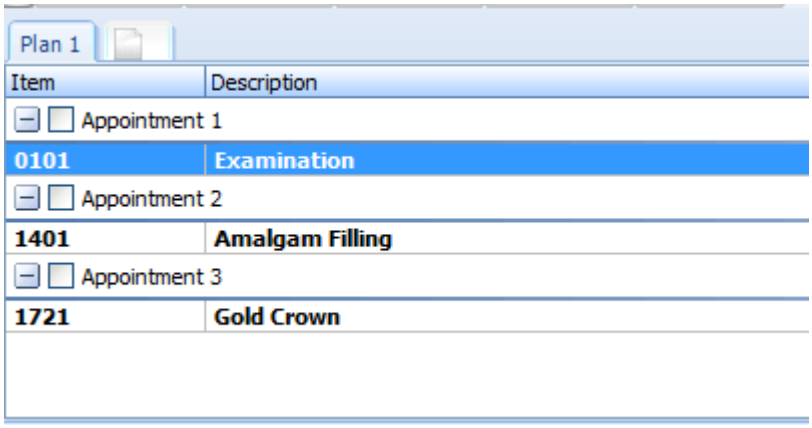
Once you have **Completed** and **Charged** the treatment items, click either **Checkout** or **Close** at the top left of your screen to update the patient's account.

Adding an alternative plan to a treatment form

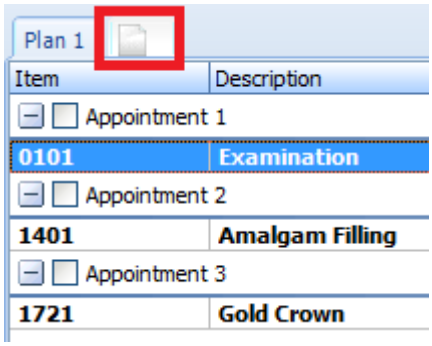
Assisting a practitioner obtain informed consent is part of any modern dental software, one way SFD v6 assists in this is to allow multiple proposed treatment options. You have the ability to do this within any treatment form, so you can see the alternative treatment plans side by side.

In the example we are going to initially open a standard NHS form (refer to creating a new treatment form section of the manual).

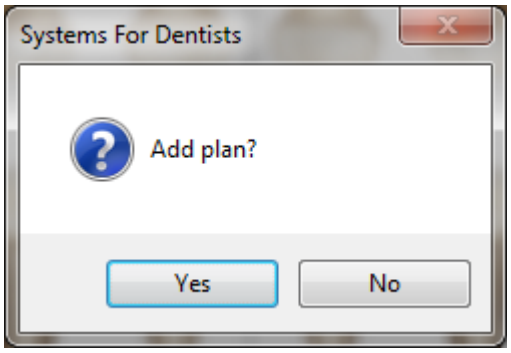
Now add the treatment items to the form (example below).



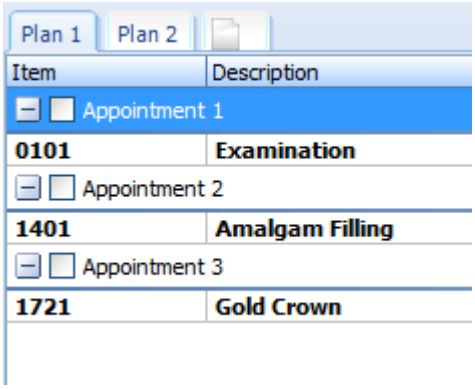
To add a second plan, click on the tab highlighted below within the red square.



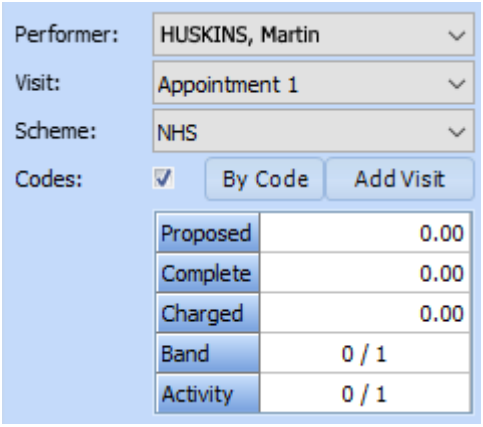
You will be presented with the following window.



Click **Yes**, and you will see that the second plan has been added.



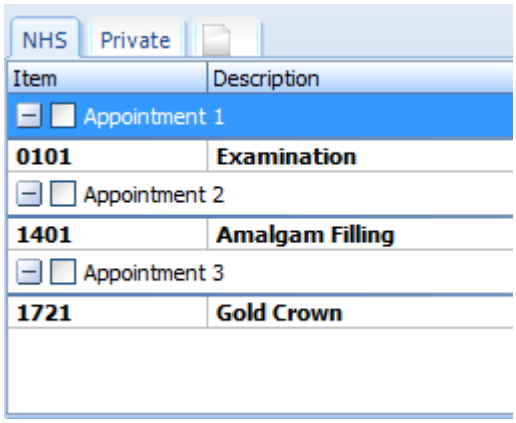
Click on plan 2. For this example we are going to demonstrate mixed forms, select private from the scheme dropdown menu on the left-hand side.



You can now add the same treatment items as Plan 1, and these will be added with the fees associated with the scheme selected (you will have to ensure the treatment items are activated for us in the particular scheme, see **Item Setup** section of the manual for more information).

You can rename the plans by right clicking on the tab you wish to change. After right clicking the following window appears.

Click **OK** to confirm. Our example of custom named plans is shown below.



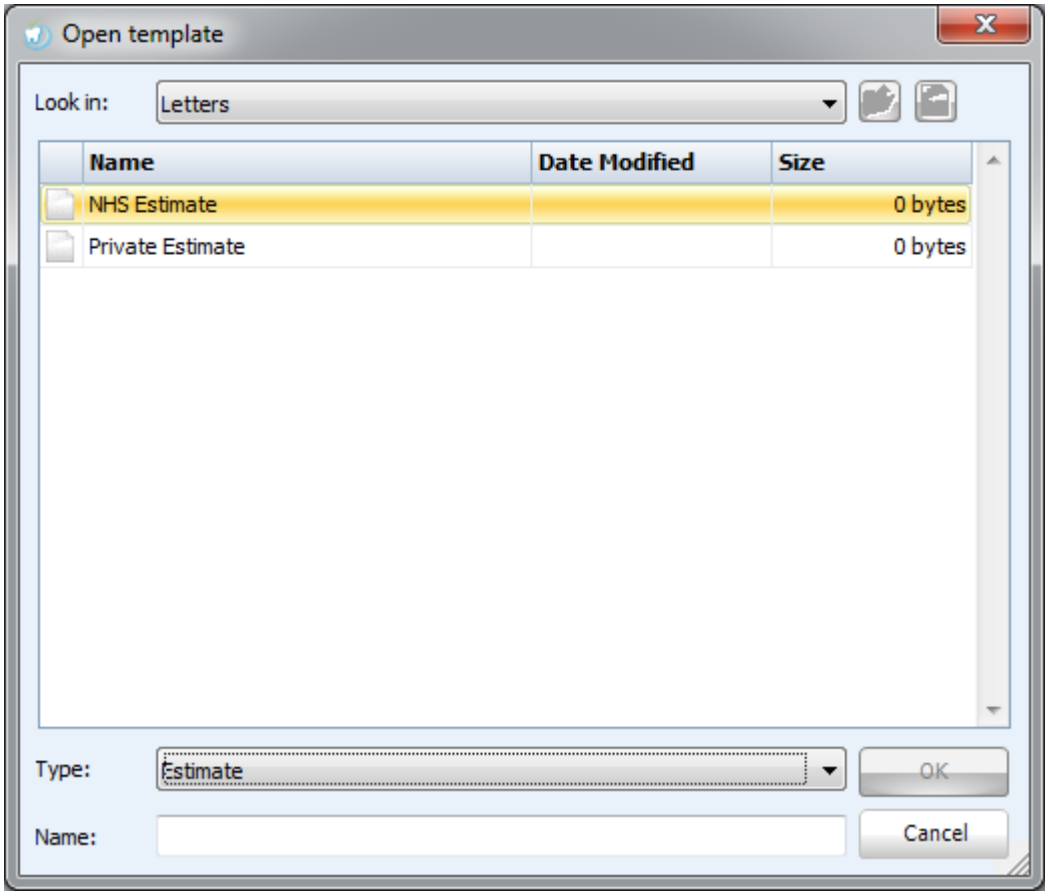
To add any additional treatment options to the form, repeat the process above.

Generating estimates

From the treatment form you have the ability to create **Estimates** (printed treatment plans), these are helpful as they give your patient a good idea of what treatment they require, the associated costs and add to your evidence of informed consent by documenting any treatment options you have suggested for the patient.

Once you have added treatment items to a form, click on the **Estimate** button towards the top of the screen.

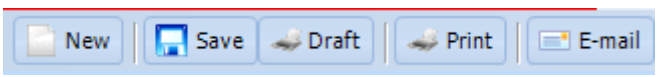
After clicking **Estimate**, you are presented with the following screen.



Dependant on your setup you may have an estimate template for each scheme you offer at your dental practice, these templates are fully customisable and the dental software supports a virtually unlimited number of templates, allowing you to create as many as you require. To open a template you can highlight the document by left clicking on it then click the **OK** button to open or double click on the document title.

Once you have clicked the **OK** button, your estimate will be generated with all the treatment items present on the treatment form.

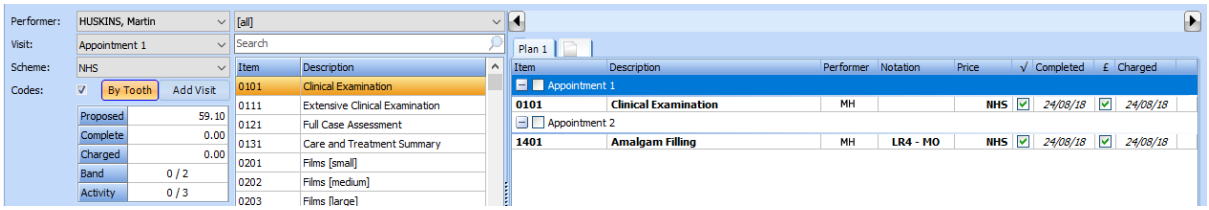
Once you have generated your treatment form you can do a number of things. You have the ability to save the estimate into the patient's correspondence (featured later in this chapter). Alternatively you can print or email the document. All this can be done from the top left of the screen.



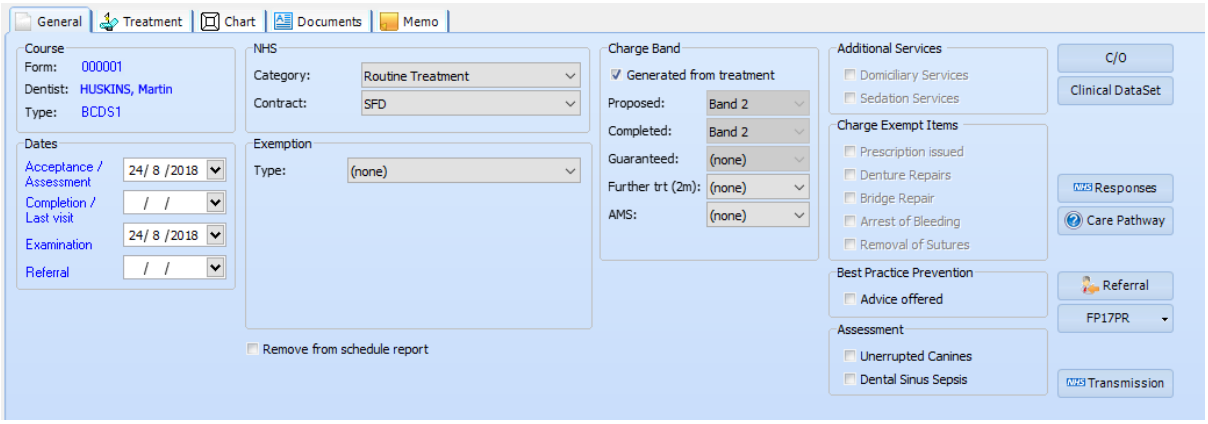
Note: *You can also add digital patient signatures to the estimate. To do this you need a Wireless Signature Pad (WSP). Please contact Sales on* ***0845 643 2828*** *to find out more about this fantastic feature.*

Transmitting an NHS form

After the completion of an NHS treatment form it is important to transmit the form to the BSA. Once you have completed and charged treatment items, your treatment form may look similar to the example below.

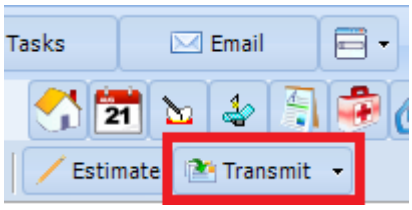


From this example we can see it is a band 3 course of treatment and therefore 12 UDA's to be claimed for. The tab to the left is to access the General page, once a course of treatment is completed it will look similar to the below.

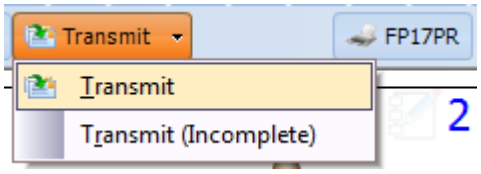


From the **General** page you can gather information such as the form number, dentist, and dates of acceptance / completion. You can also edit the contract and exemption type from this page if necessary. It is also possible to set a manual charge band however it is advisable to keep the **Generated from treatment** check box ticked as this automatically generates the correct charge bands associated with the treatment items present on the form.

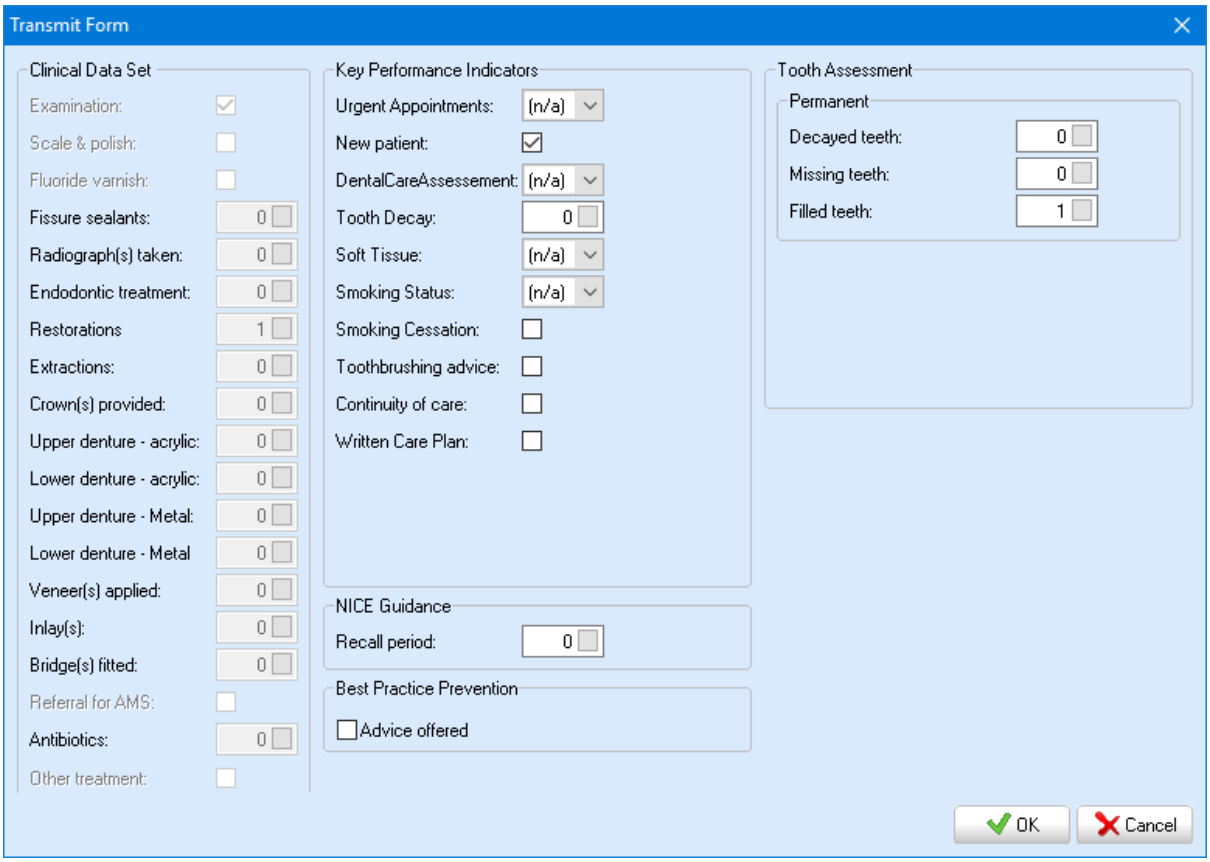
Once you are satisfied with all the information presented on the form, you are ready to transmit. To do this, click on the **Transmit** button towards the top of your screen.



After clicking the **Transmit** button you have two options, either **Transmit** or **Transmit (Incomplete).** **Transmit (Incomplete)**, this is for cases where patients have attended for part of their course of treatment but haven't returned for the appointment(s) to complete the entire course, you should only claim as incomplete if treatment items have been started, refer to your NHS contract for guidance.

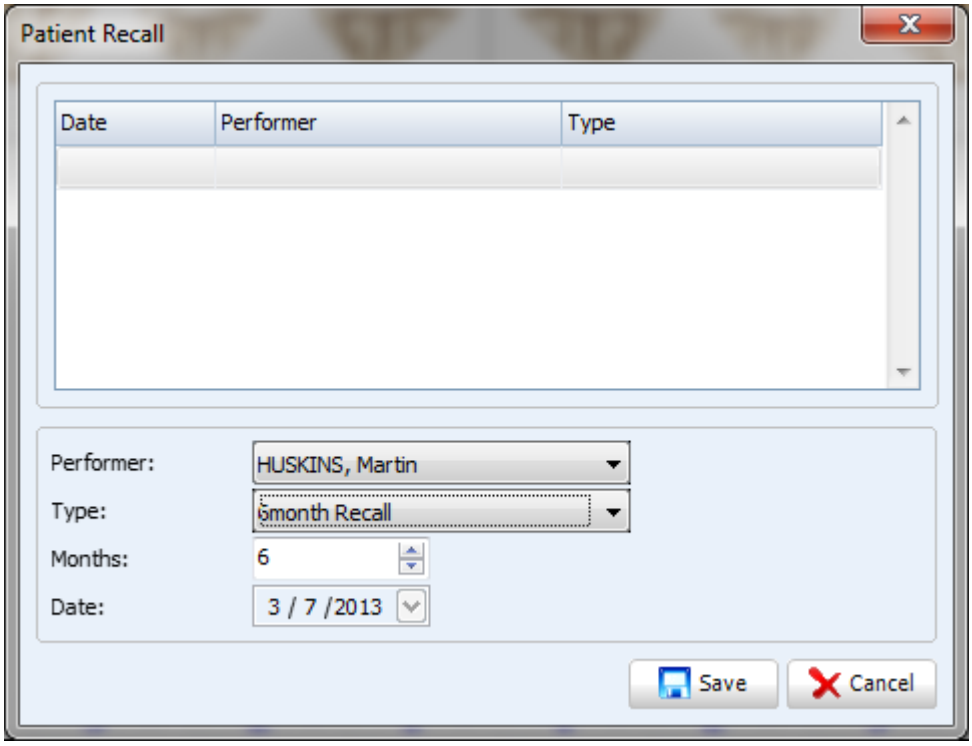


Once the appropriate selection has been made, you will be presented with the following window.



The treatment form will now be in the **Pending forms** section of the **Transmissions** screen (featured later in the manual).

You will now be prompted to set a recall for the patient as shown below.



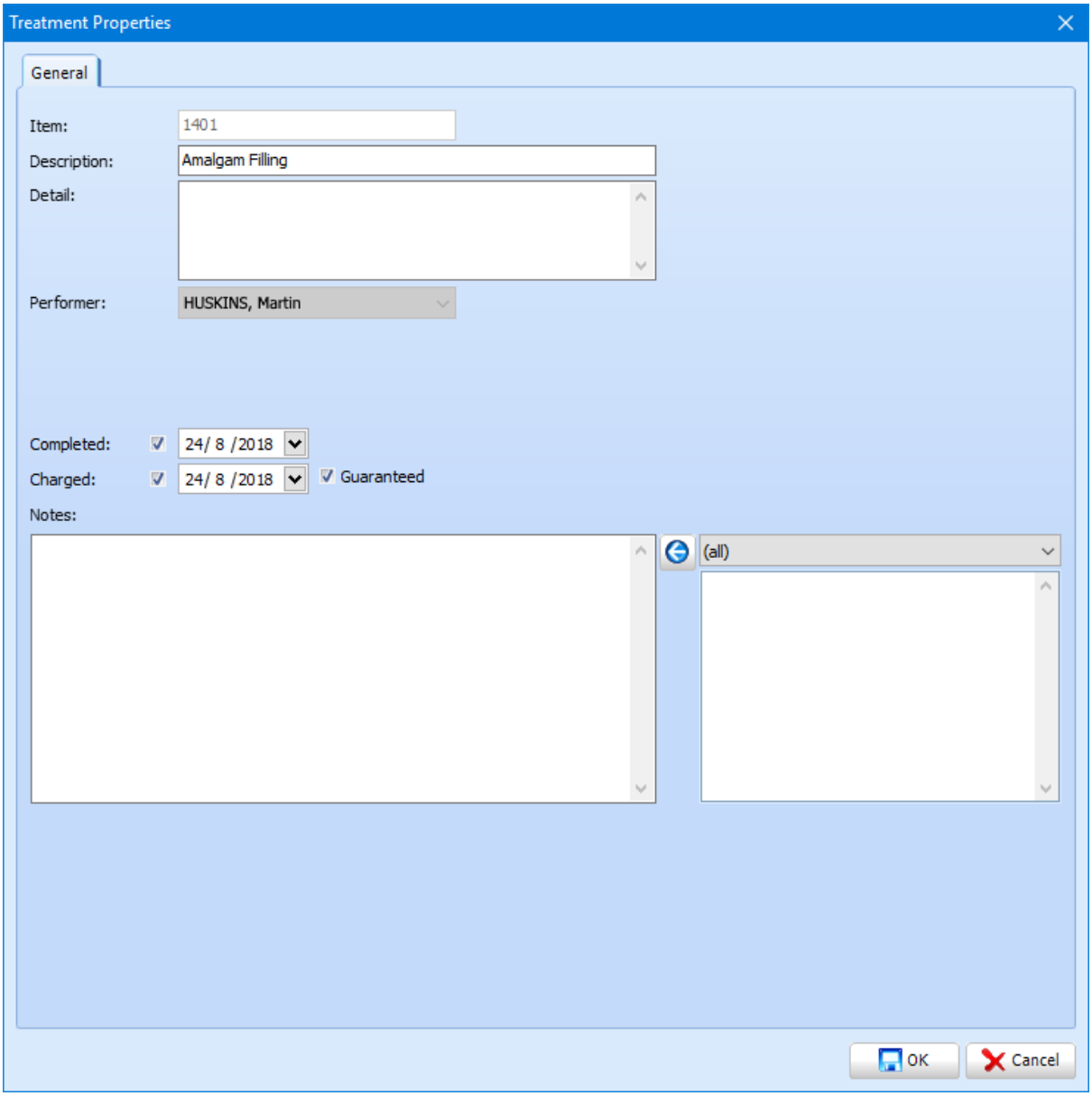
From this window you can select the performer, type of recall and how many months you wish to recall them in. Click the **Save** button to set the recall (learn how to send recalls later in the Reports section of the manual).

Adding guaranteed items to an NHS treatment form

There will be times where it is necessary to add guaranteed items to a treatment form. This is a very simple procedure. First of all you will create your new treatment form. The second step is to add the item onto the form that you wish to mark as guaranteed.

Once you have added the treatment item to the form, double click on treatment item. You will be presented with the **Treatment Properties** window.

Note: You may need to add an exam and guarantee this as well!



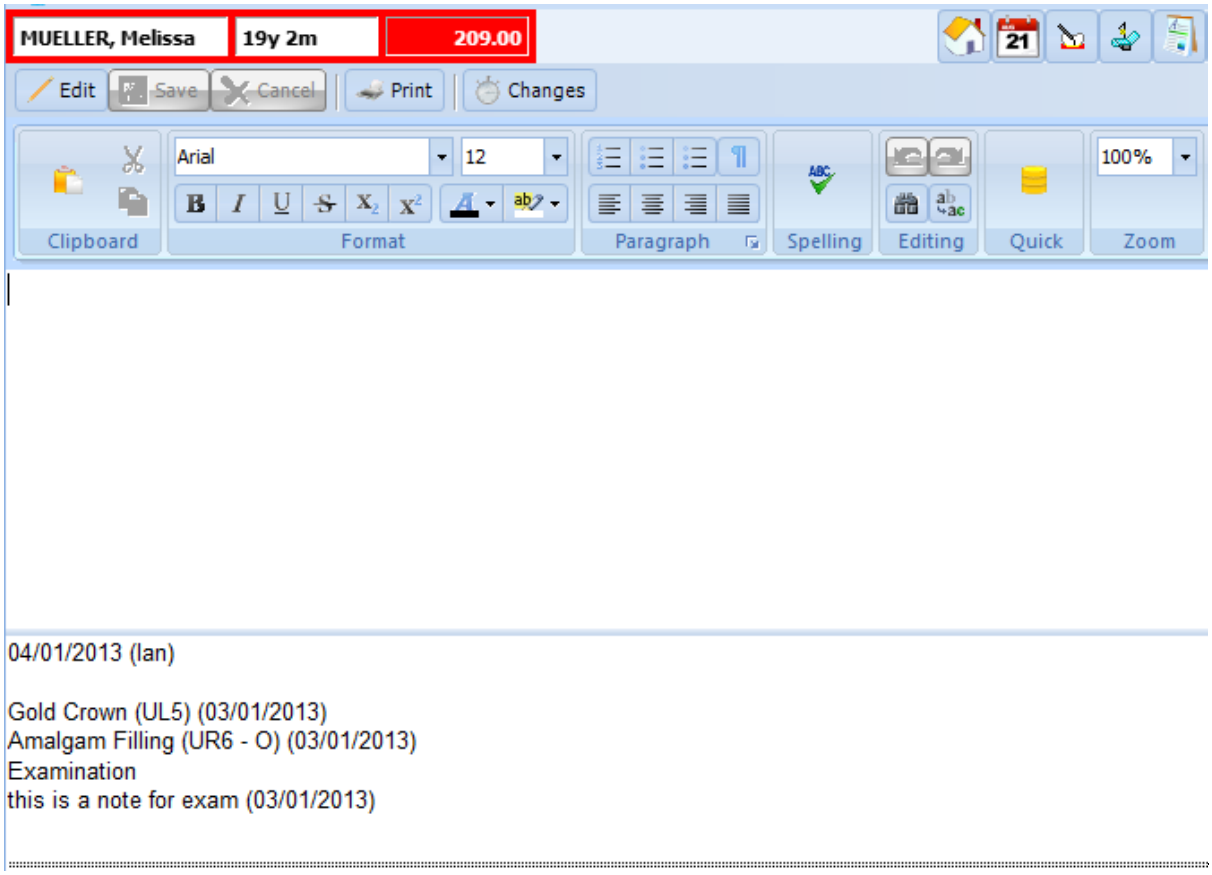
You will see that next to the **Charged** label there is a **Guaranteed** checkbox. To guarantee the treatment item tick the **Guaranteed** checkbox. Then click the **OK** button in the bottom right to confirm.

Guaranteed items are outlined in your NHS contract, please ensure you understand and follow the guidance provided by the Department of Health or BSA with regards to any NHS claims.

Clinical Notes

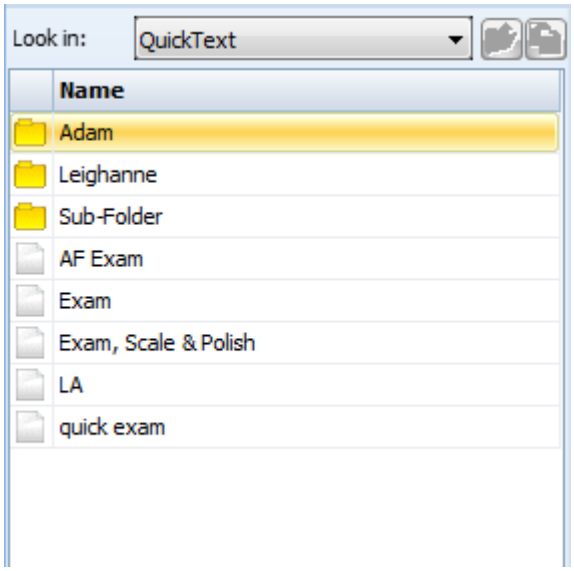
To enter the clinical notes section of the patient record, click on the Notes **icon** which is situated towards the top of the screen.

After clicking the **Notes** button you will be presented with the following screen.

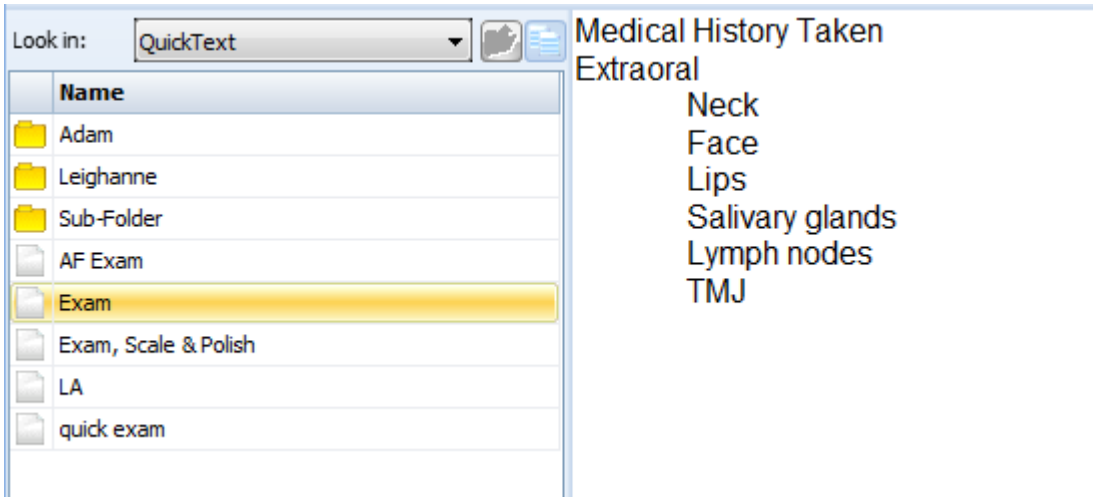


Notes can be entered in the box above. They can be formatted using the options above.

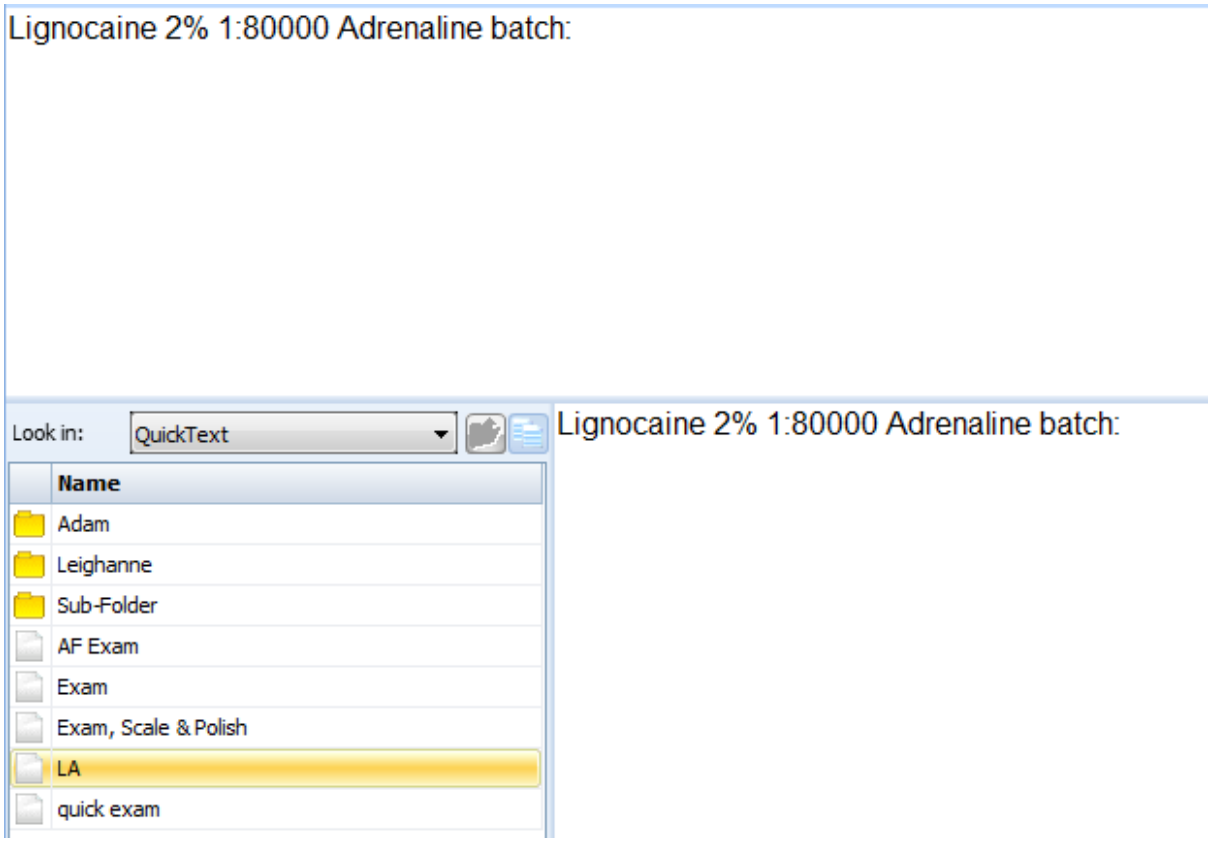
Templates can be found under the **Quick** button.



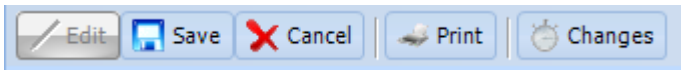
Notice that you can create subfolders to keep your quick texts categorised (refer to the **Quick Text Setup** section of the manual). To preview a quick text left click on the desired text from the panel on the far left of the screen.



To add one of the quick texts to your current notes double click on the note title from the menu.



Once you have finished creating your notes click the **Save** button towards the top of your screen, pressing the **quick** button will toggle on and off the quick text templates, allowing access to all the historical clinical notes for the patient.



Note: Clicking on the cancel button will clear any notes written that have not been saved, this cannot be undone.

You have the ability to print your notes. To do so, click on the **Print** button.

To view historic notes scroll down the screen using the scroll bar towards the far right of the window.

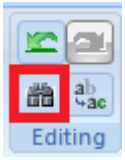
It is vital for legal reasons that you are able to prove when your notes where written, altered and who entered them. For this reason we only allow editing of clinical notes on the day they were written, after which time you have to enter a new note.

No clinical notes are ever truly deleted and changes can be accessed from the clinical notes section of the patient record. To view deleted and altered clinical notes click on the **Changes** button which is located next to the print button. Any notes that have been deleted will have the username and date in red with a strike through, as shown in the example below.

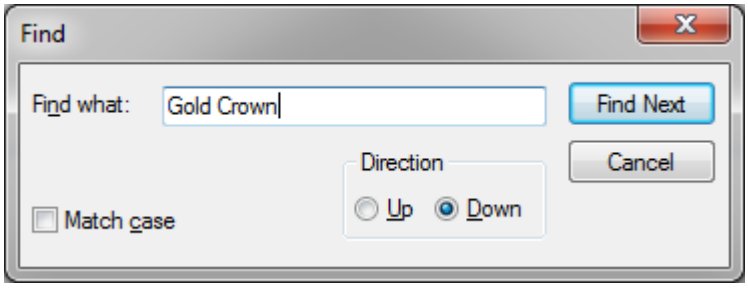
~~02/01/2013 (Ian)~~

Amalgam Filling (UR6 - O)

Tip: *If you are searching for specific notes within a patient record that has a high volume of notes entered, you can use the Find Text feature. This is found in the top ribbon (icon shown below).*



You will be presented with the following window.



Enter your key word into the Find what text box, once you have done so click the Find next button which will become activated once you type into the box. The word you have searched for will now be highlighted (example below).

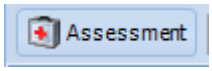
04/01/2013 (Ian)

Gold Crown (UL5) (03/01/2013)
Amalgam Filling (UR6 - O) (03/01/2013)
Examination
this is a note for exam (03/01/2013)

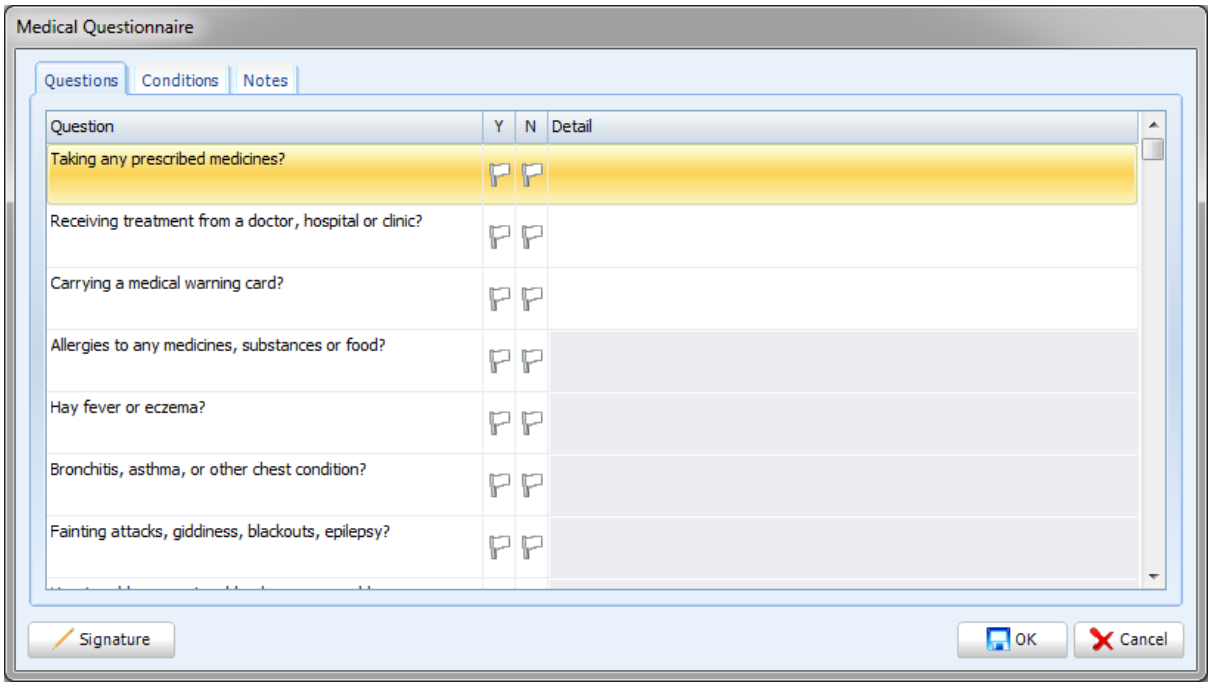
Patient Medical

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

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



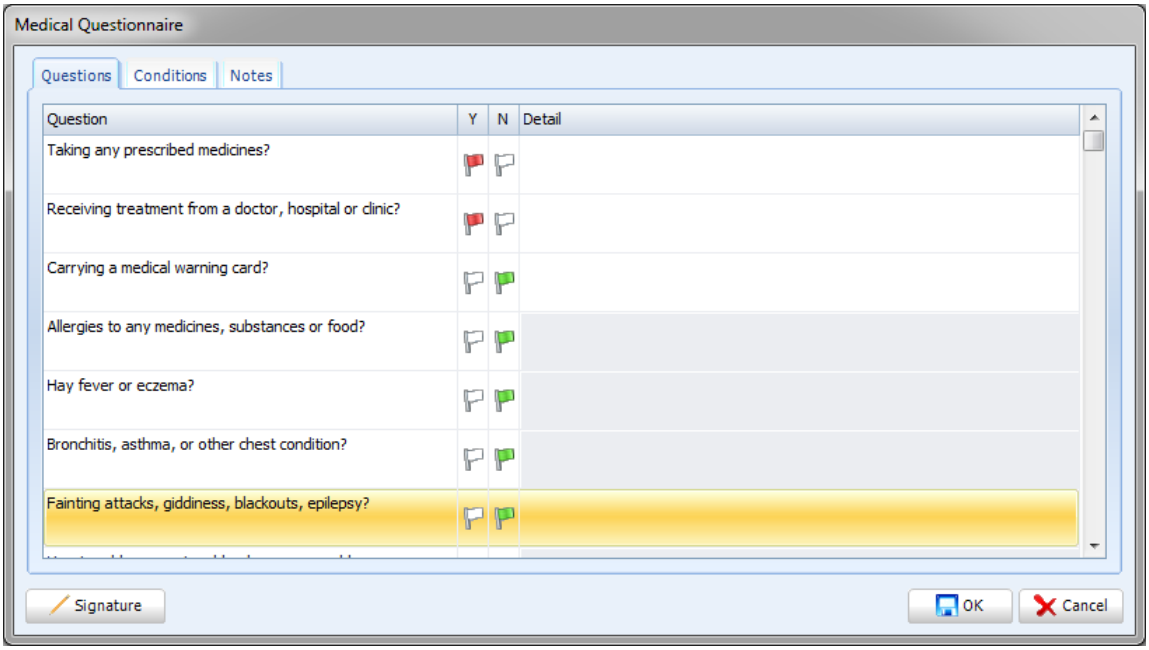
Once you have clicked the **Assessment** button you will be presented with your medical questions, as previously setup within the dental software setup section. SFD v6 is supplied with a sample medical questionnaire which should be checked and approved by the practice prior to using the system.



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

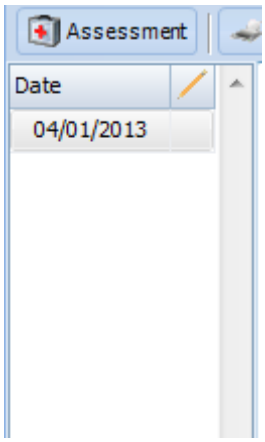
Note: *The medical questionnaire is another place where you can use SFD v6's fantastic signature feature to record patient signatures so there is no need to store paper records. Contact our Sales team either by phone on* ***0845 643 2828*** *or email sales@sfd.co for more information.*

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

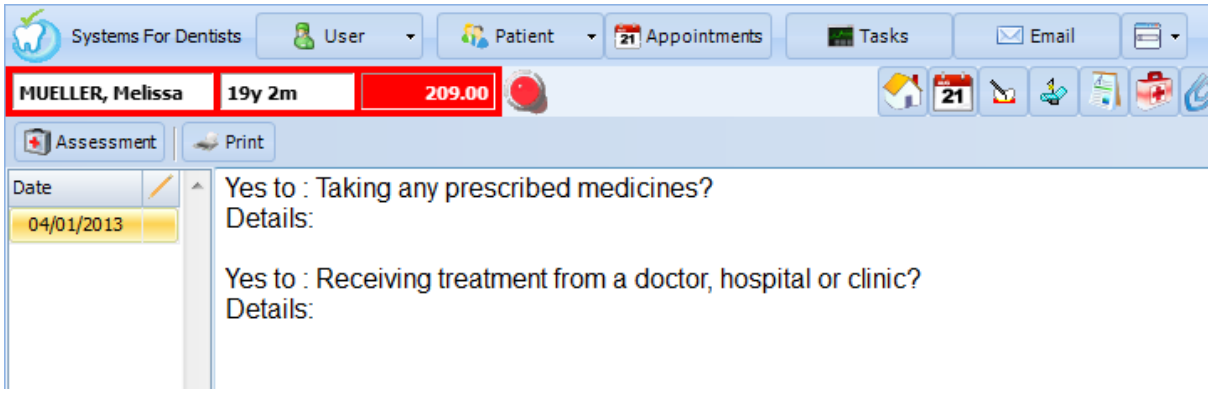


Once you have entered all necessary information, click the **OK** button in the bottom right hand corner of the window.

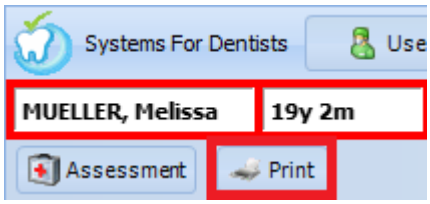
You can see any historical medical forms in the left hand column of the screen (example below).



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



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



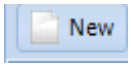
Popup notes and memo

The **Popup notes and memo** section of our dental software is designed to facilitate the use of temporary notes. Popup notes are primarily used to inform staff of a patient's requirement such as sundries that have been recommended or a note to remind reception to ensure a payment is made prior to booking additional appointments.

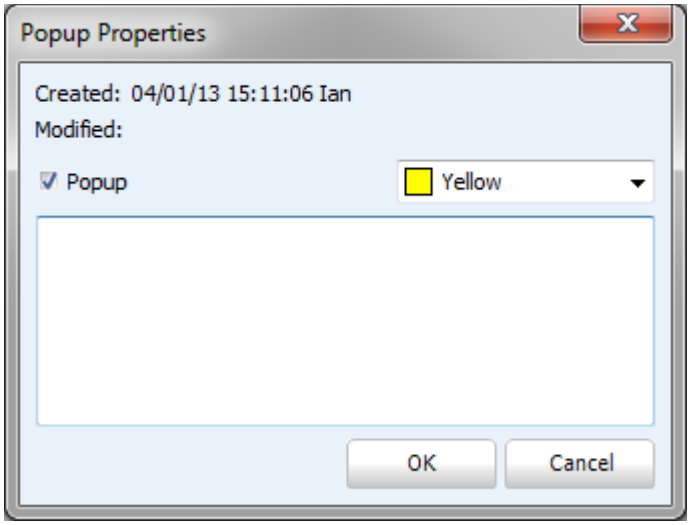
The memo facility is one of the few locations in the dental software where the information is not stored when removed, once a memo has been cleared the information in it will be lost forever thus no clinical or vital information should be stored in this section. The main purpose of this area of the dental software is to store social information, enabling dental care professionals to retain a familiar report with the patient. Examples include "Patient going on holiday to Florida" or "Patient expecting first grandchild in June".

To enter the popup and memo section click on the icon shown below.

To create a new popup note, click on the **New** button in the top left of the screen.

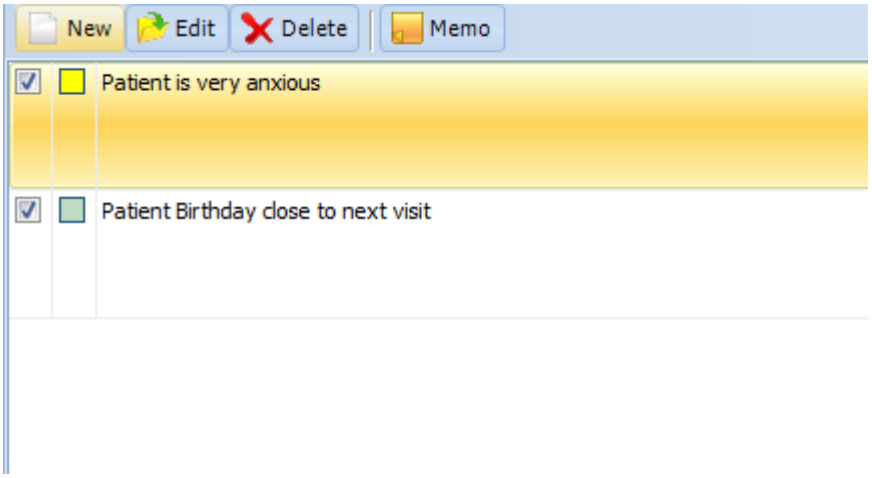


After clicking **New** you will be presented with the following window.



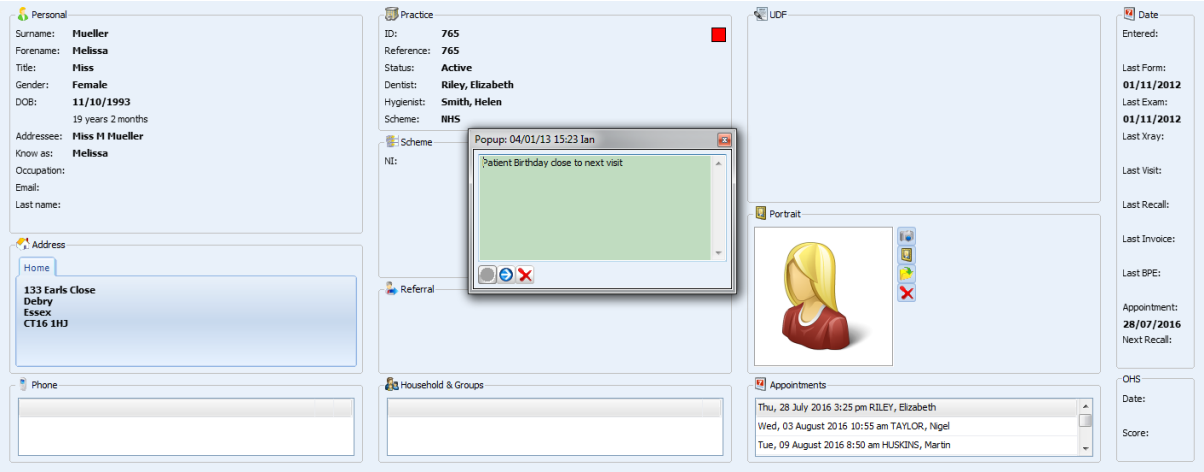
From this window you can select whether you want the message to popup when you enter the patient's record. If you wish so, tick the **Popup** checkbox (this is the default for all new popup notes). You also have the ability to choose the colour of the note (useful if you are using a traffic light system for matter of urgency). Add the content of your note into the text box. Click OK to save your note.

You are able to add multiple notes per patient, repeat the process shown above to further notes. Once created, they are stored as shown below.



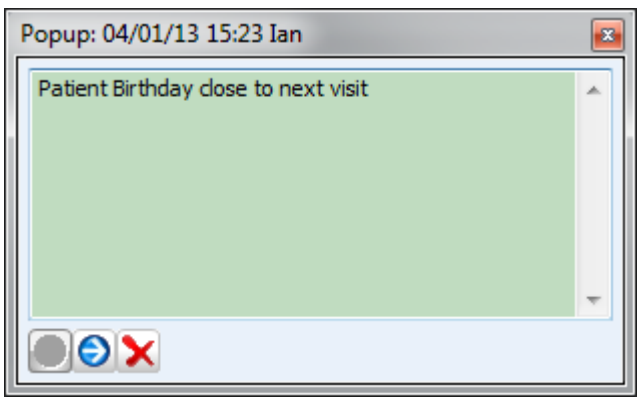
From this list of notes you have the ability to edit or delete any notes that exist. Highlight the note by clicking on it then either clicking the **Edit** or **Delete** button to perform the required action.

This is how the notes will be presented when entering a patient's record (if popup is enabled).



Tip: *If another terminal is in the same patient's record when you save a new popup note, it will immediately show on the other terminal.*

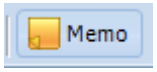
If the patient has more than one pop-up note use the **arrow** in the bottom left to navigate through the pop-up notes.



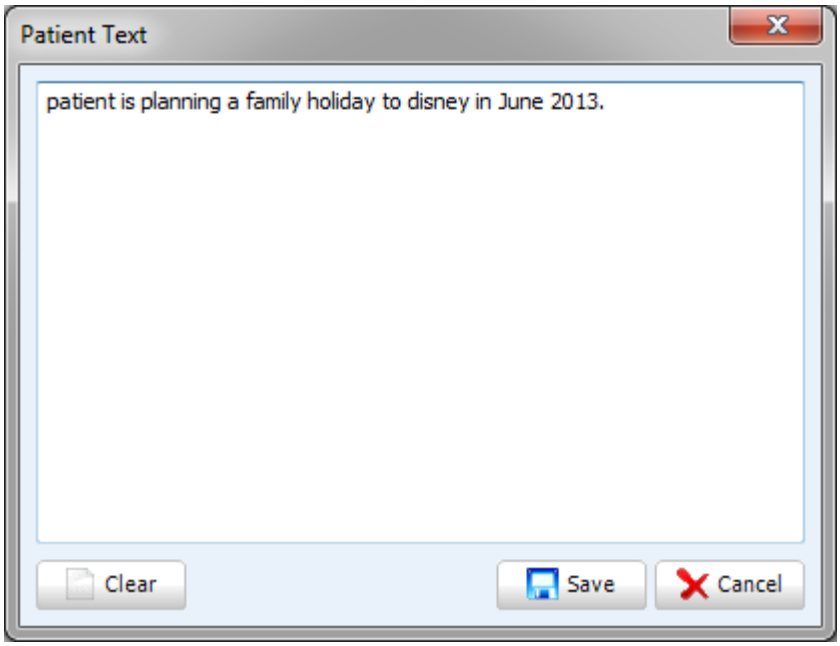
If the popup note is no longer required, you should remove it by clicking on the **Red Cross** in the bottom left of the popup note. Once you have done this the dental software will require you to confirm the deletion (removal of pop-up option).

The next option is creating or updating a patient memo. To create a memo, first of all navigate back to the **Popup notes and memo** section of the patient's record.

Click on the **Memo** button towards the top of the screen.



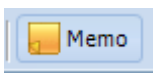
Once you have clicked **Memo**, you will be presented with the following window.



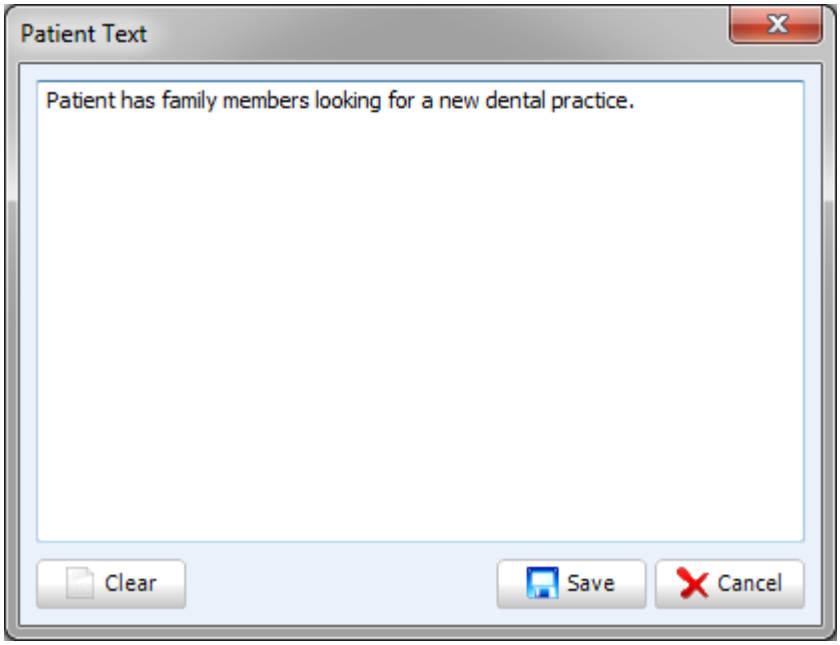
Enter your text into the window. After entering the necessary information, click the **Save** button in the bottom right of the window. The text will now be displayed in the memo section of this page;

you will also note that the following patient flag is now visible on the patients information bar . Clicking on this flag automatically opens the Pop-up and Memo page of the patient record.

To clear any text, click on the **Memo** button.



The following window will then appear.



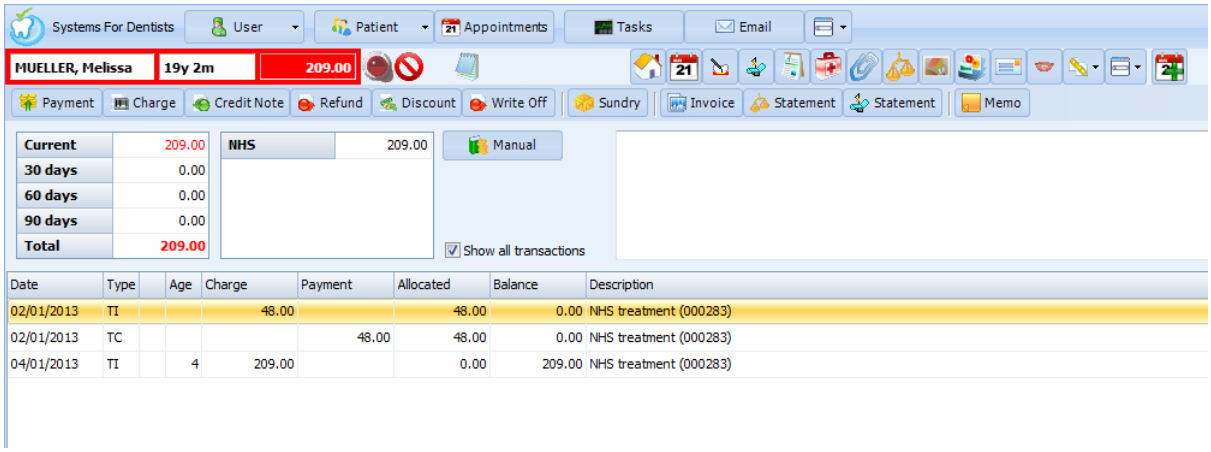
From this window, click the **Clear** button in the bottom left corner. Once cleared, click the **Save** button to close the window. The patient flag denoting a memo will also have cleared.

Note: *Once cleared this text cannot be recovered.*

Patient Accounts

It is important to keep patient level account information accurate in your dental software. This section of the SFD v6 manual will take you through the patient's **Account** section of the program. To enter the patient account screen, click on the button below within the patient's record.

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

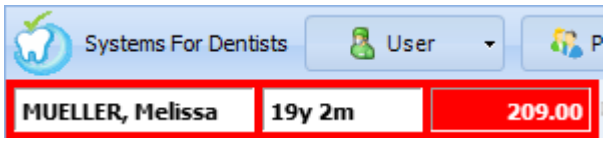


***Tip:** As the patient accounts are fully itemised in our dental software, we have the historical (paid / complete) accounts items hidden from view by default. This ensures the accounts are easy to read and review. You may need to view the historical items, to do this click the **"Show all transactions"**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

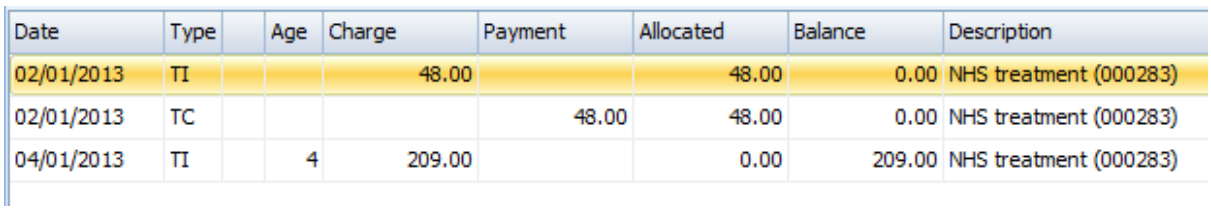
Payments

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

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



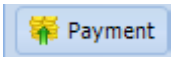
Once you are in patients account section you will see the treatment invoice(s) present in list form (example below).



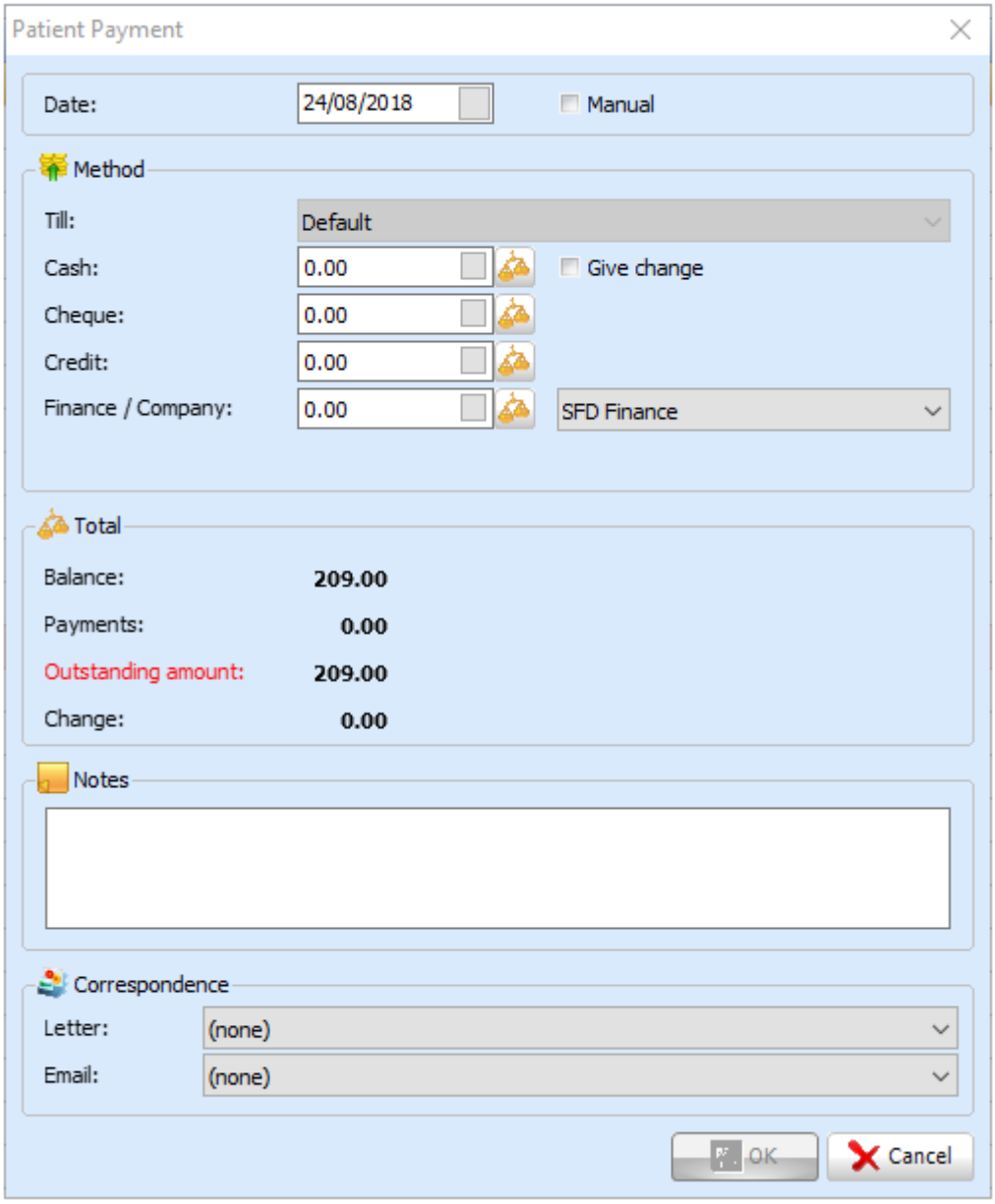
Date	Type		Age	Charge	Payment	Allocated	Balance	Description
02/01/2013	TI			48.00		48.00	0.00	NHS treatment (000283)
02/01/2013	TC				48.00	48.00	0.00	NHS treatment (000283)
04/01/2013	TI		4	209.00		0.00	209.00	NHS treatment (000283)

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

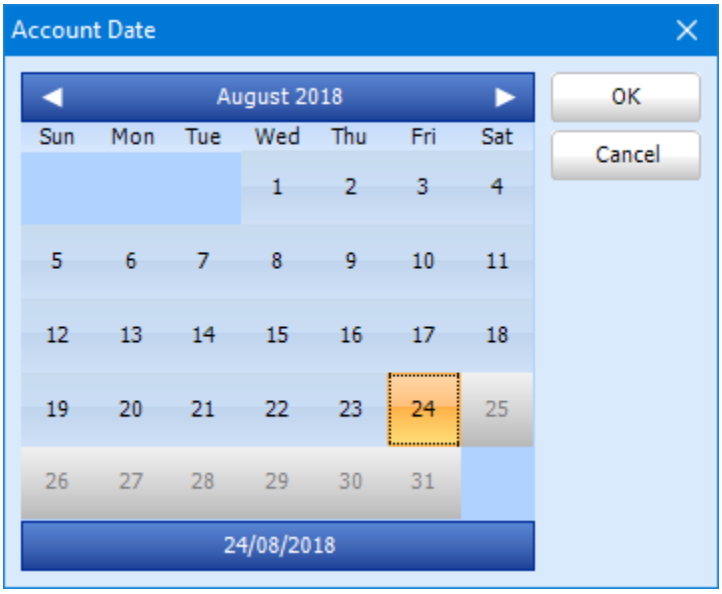
On 04/01/2013 we have a treatment invoice of £209. This is an invoice that the patient wishes to pay off. To do this click on the **Payment** button towards the top left of the patient account screen.



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

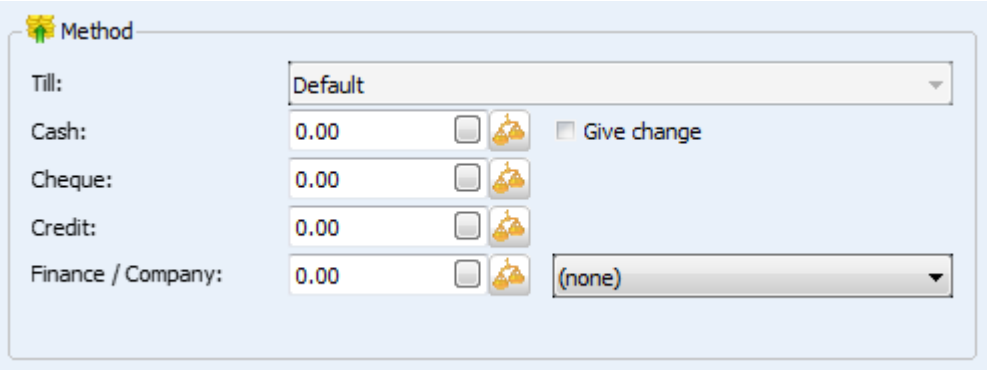


At the top of this window you have the date, by default it will display the current day. You have the ability to change this if you need to put a payment through for a previous date. Click on the grey square in the right hand side of the date box to select a date if necessary (the calendar screen below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



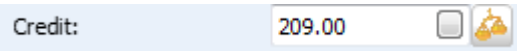
Select the desired date by clicking on it, and then click the **OK** button.

After the date you have the payment method.



Enter the payment amount into the appropriate method of payment.

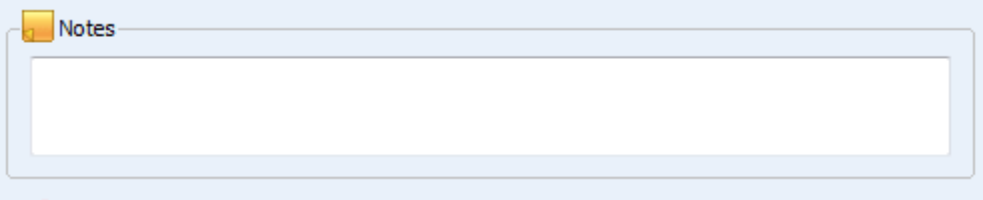
Tip: *Click on the Scales icon next to the desired method of payment to automatically generate the outstanding amount that has to be paid.*



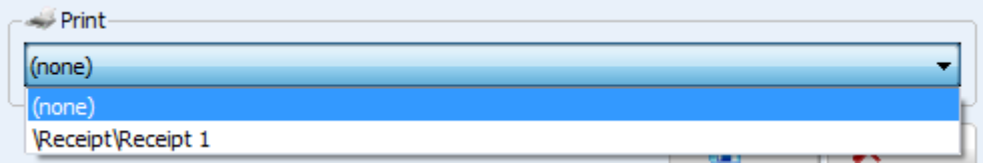
After adding the amount next to the desired method of payment, the balances section of the payments screen will be updated.

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

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



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



Select a template from the dropdown list.

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

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

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

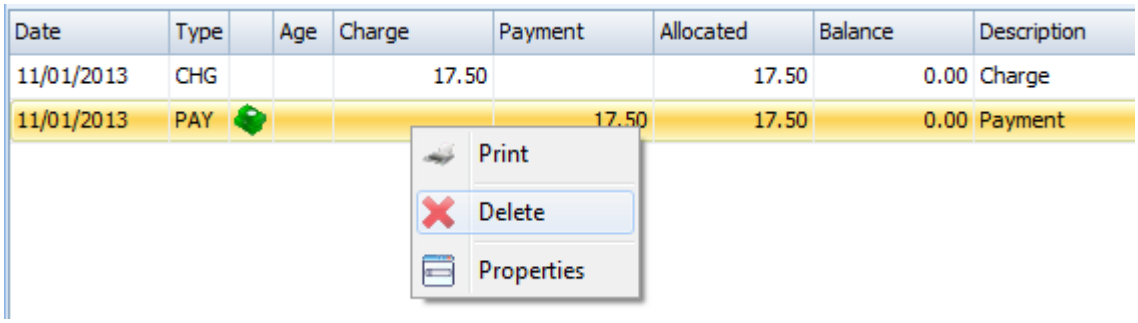
The patient balance at the top of the screen has also been updated.

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

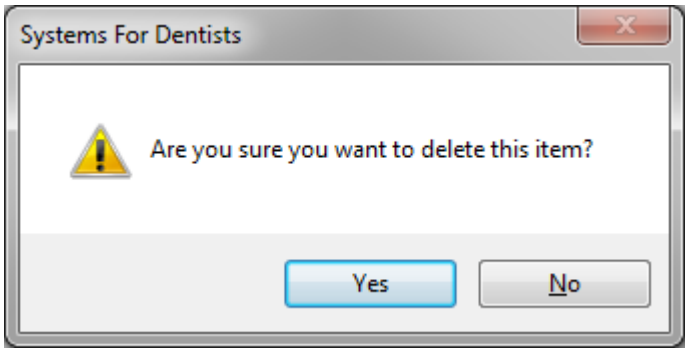
Deleting Payments

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

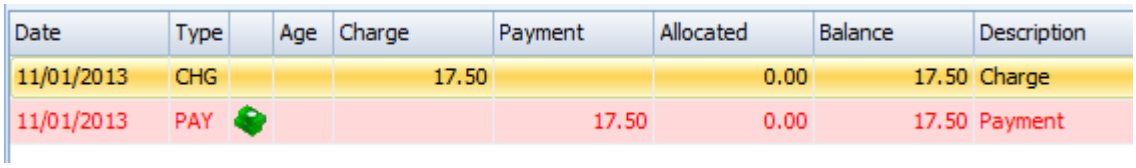
Select the payment you wish to delete by left clicking on the payment. Now you have selected the payment, right click then click **Delete**.



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

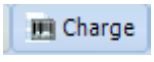


The payment is now deleted and will be highlighted red in the list of payments. All of the dental software reports have been updated to reverse the allocation of this payment, and its removal on the cash reports for the given date has also been completed.

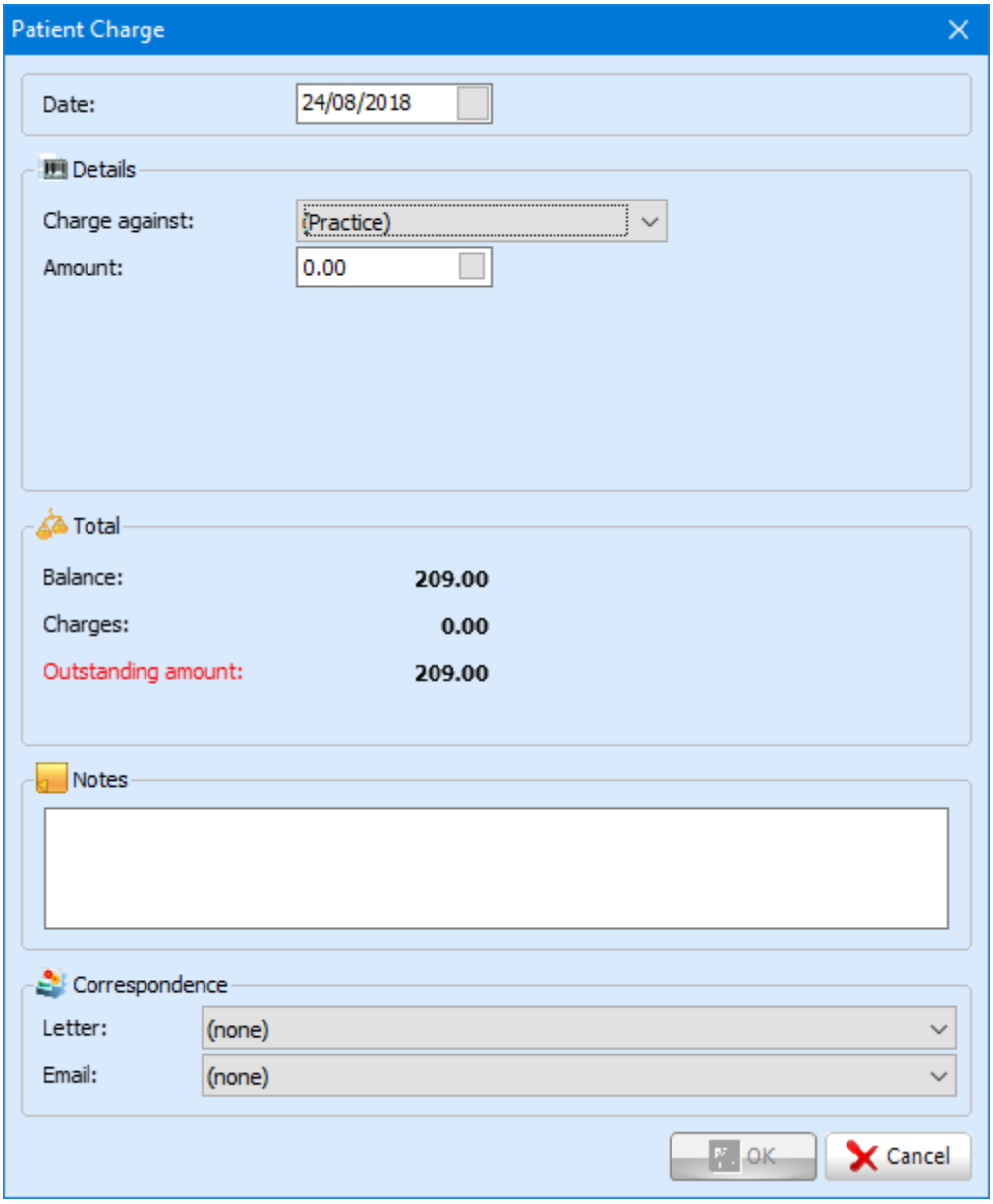


Charges

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



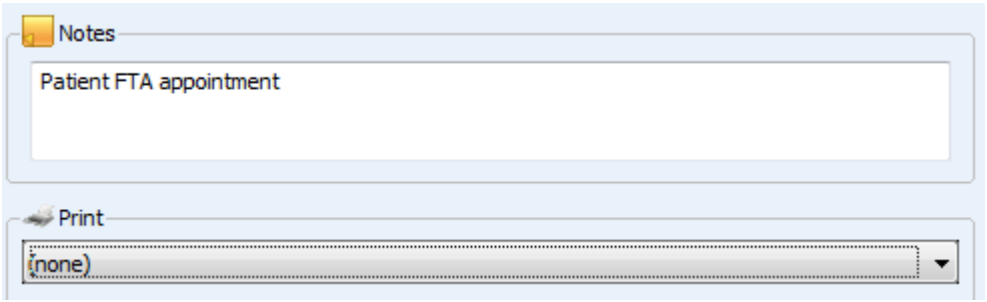
You will then be presented with the **Patient Charge** window.



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

Next, enter the amount of this patient charge.

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

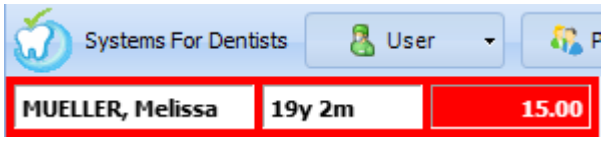


You have the ability to print a receipt for the charge. Click **OK** to confirm the charge.

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

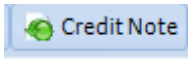
Date	Type		Age	Charge	Payment	Allocated	Balance	Description
02/01/2013	TI			48.00		48.00	0.00	NHS treatment (000283)
02/01/2013	TC				48.00	48.00	0.00	NHS treatment (000283)
04/01/2013	TI			209.00		209.00	0.00	NHS treatment (000283)
08/01/2013	PAY				209.00	209.00	0.00	Payment
08/01/2013	CHG			15.00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

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

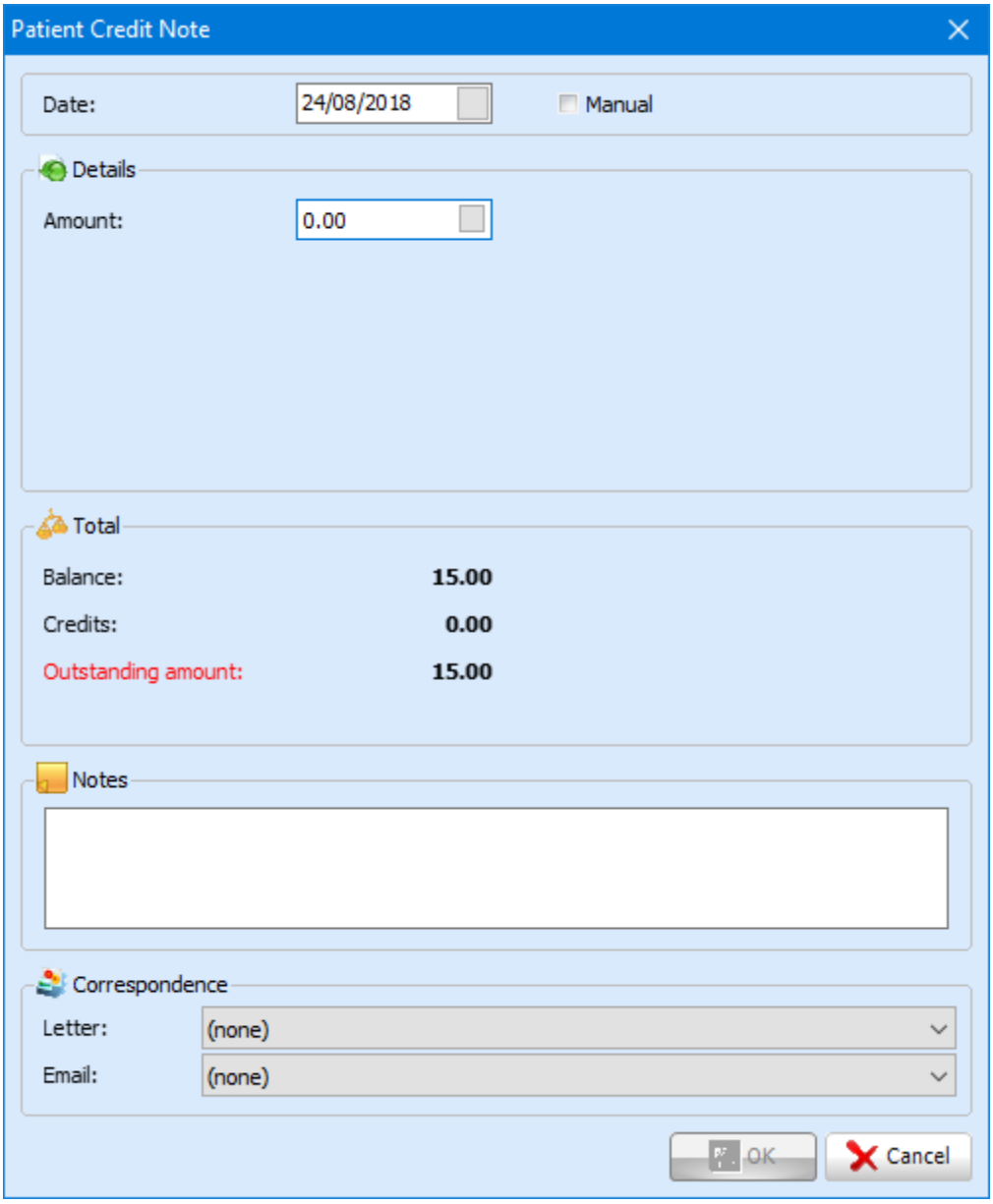


Credit Notes

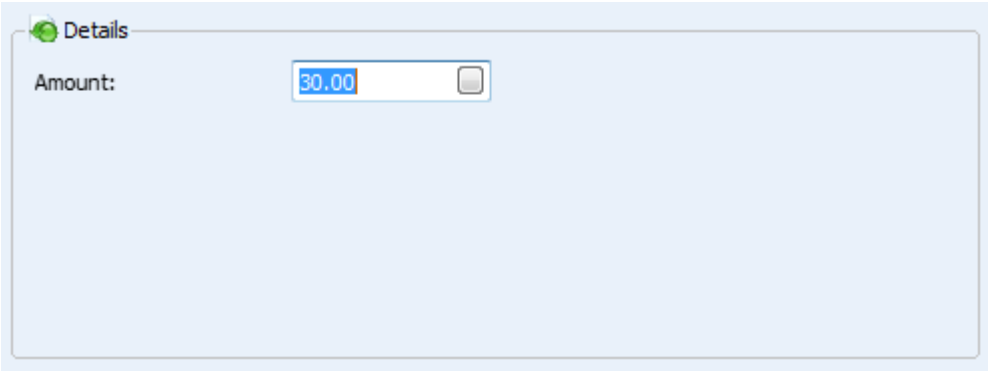
There may be times where you give patient credit notes. These are most commonly used for special offers you may have at your practice. To add a credit note to a patient's account, click on the **Credit Note** button towards the top of the screen.



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

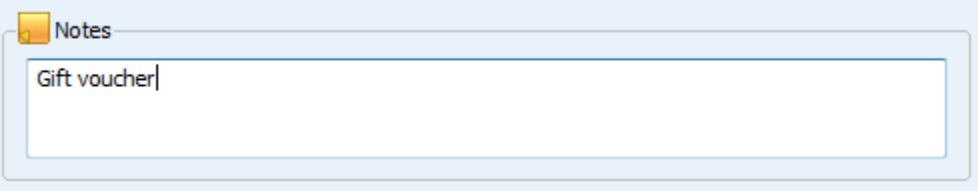


This window is very similar to the **Payment** and **Charge** screens. First, you are presented with the date (defaults to current day). The next section is **Details**. This is where you enter the amount the credit note is worth.



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

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



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

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

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

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

Refunds

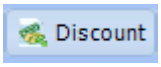
There may be times where a payment is entered into your system incorrectly and you may be required to refund a patient a certain amount of money. To do this, follow the steps below.

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

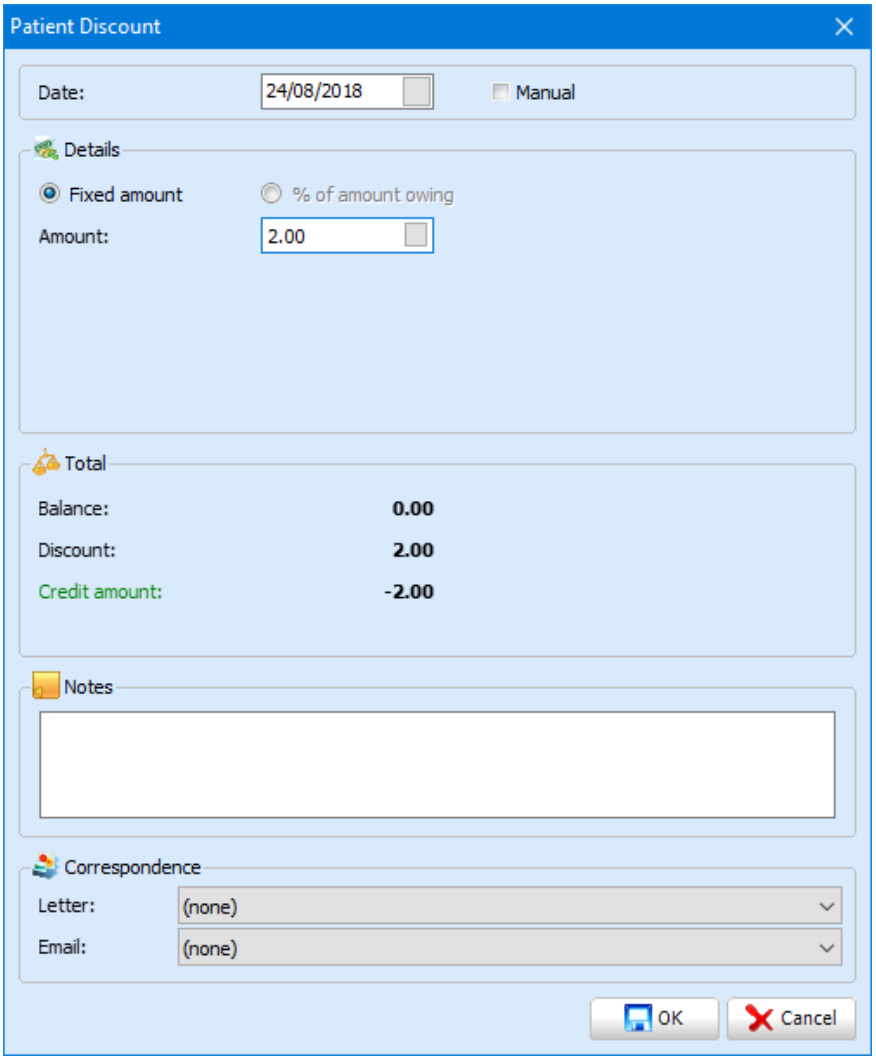
When you first enter the **Accounts** screen make sure the **Show all transactions** checkbox is ticked. Highlight the charge you have entered into the system incorrectly. To do this, click on the charge (example below).

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

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



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

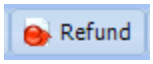


Once you have entered the values, click **OK**. You will now notice that the patient is in **credit** by £2 (providing the accounts were balanced before discount). The next step is to **balance** the account, to do this you need to **refund** the same amount you discounted.

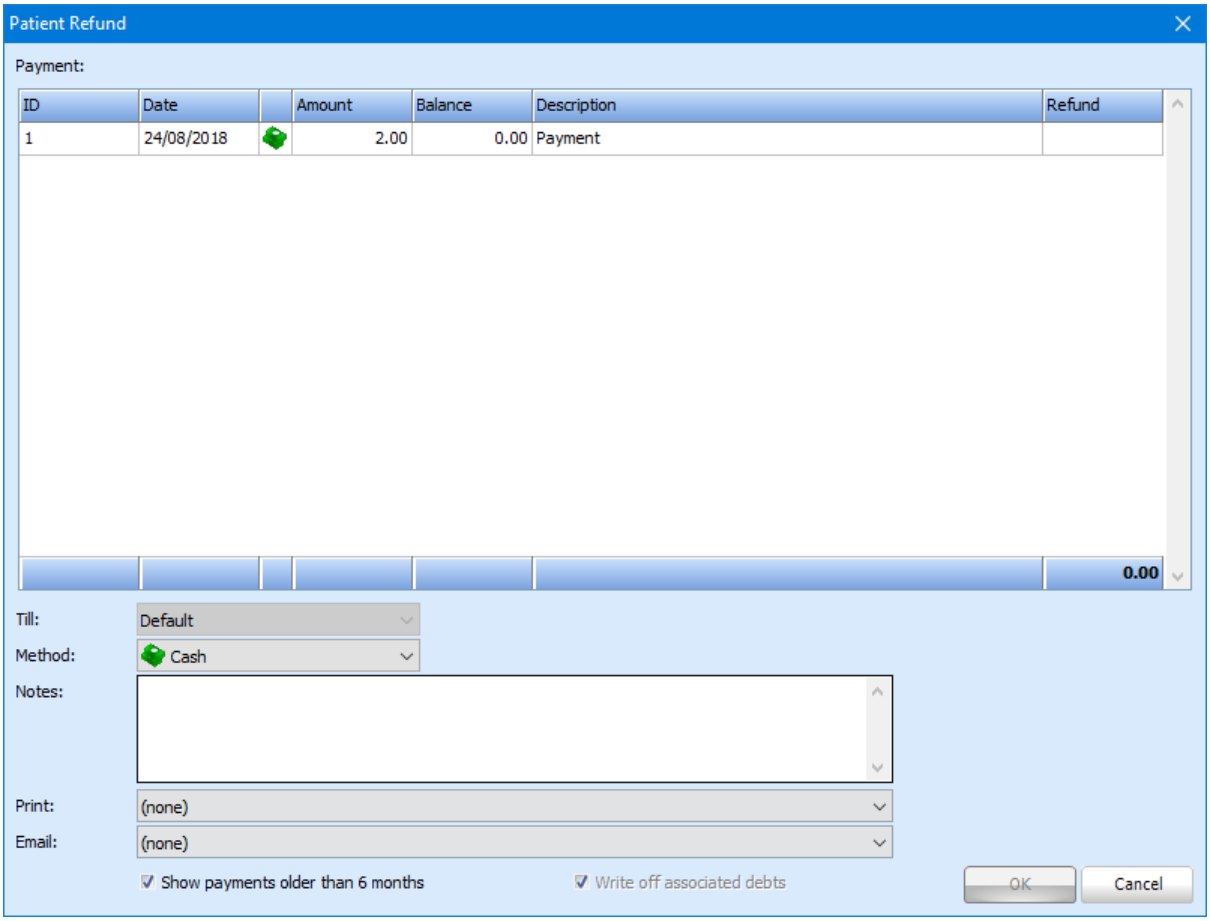
So for the next step, rather than clicking on the charge, you are going to click on the initial payment (example below).

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

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

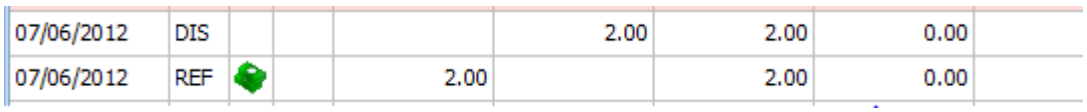


The **Patient Refund** window appears. Similar to the **Discount** window you have the ability to backdate. In the example below, the original payment was paid by cash so next to cash I am going to enter the £2 that needs to be refunded to the patient.



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

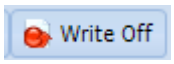
The patient's account will now be balanced. The discount and refund will be displayed as shown below.



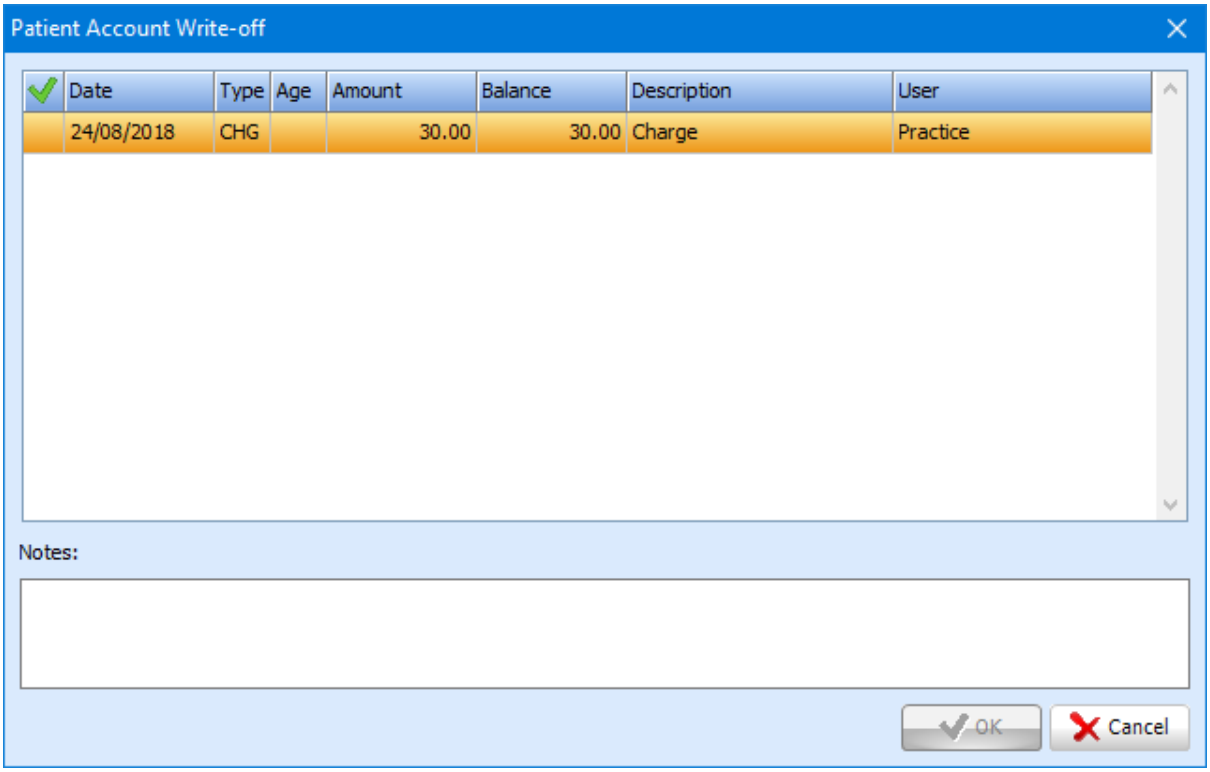
07/06/2012	DIS				2.00	2.00	0.00
07/06/2012	REF			2.00		2.00	0.00

Write offs

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



You will then be presented with the following window.



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

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

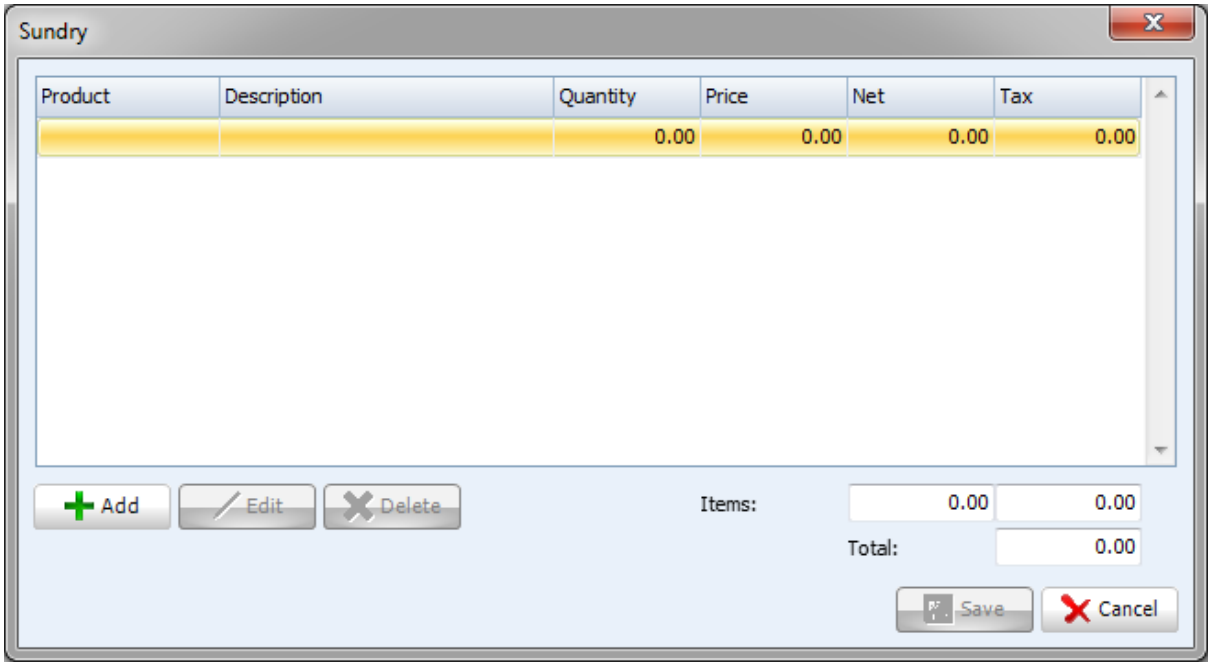
The write off will show in the list of transactions as shown below.

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

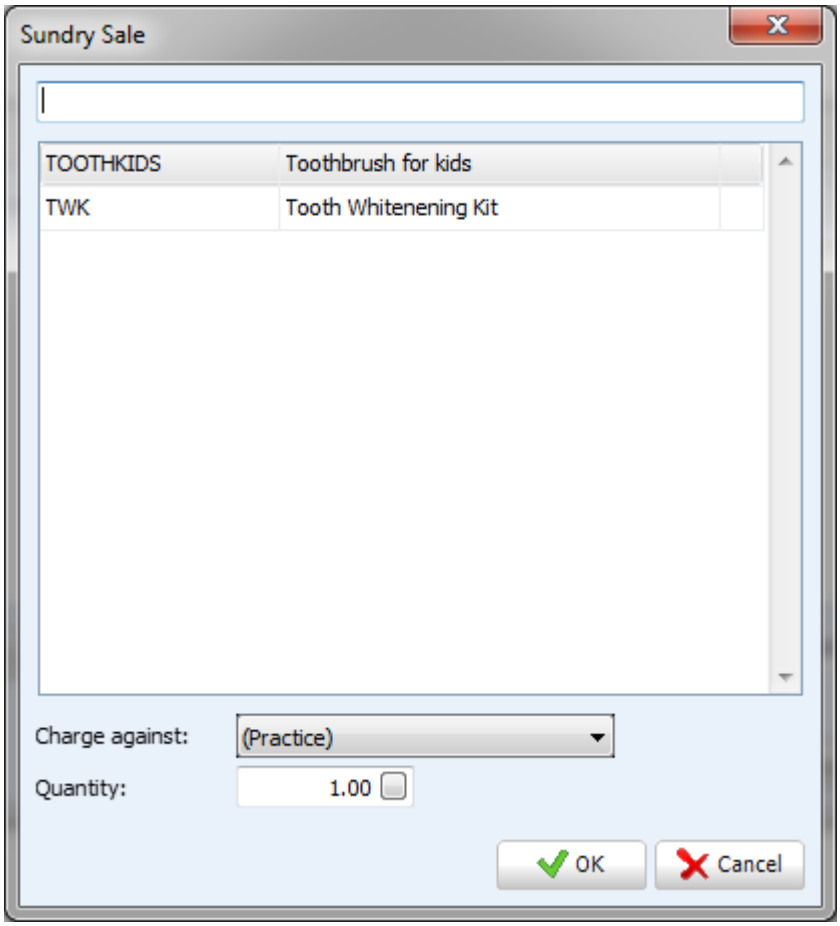
Sundry sales

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

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

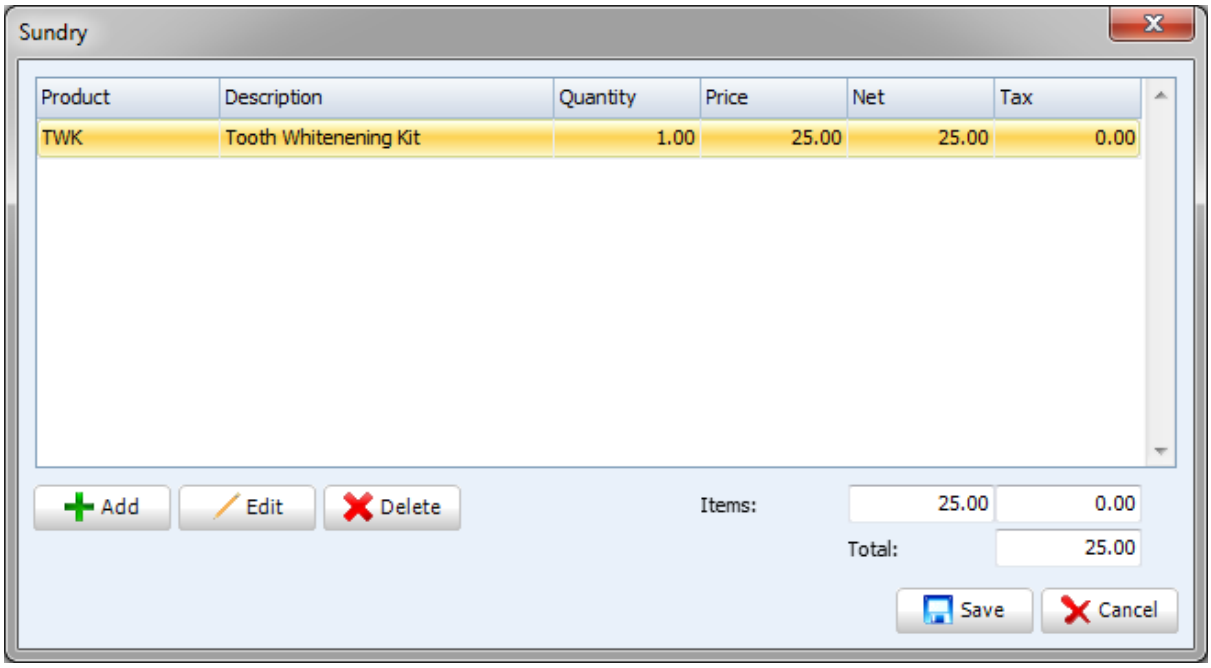


To add a sundry item, click on the **Add** button in the bottom left of the window. You will be presented with the following window.



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

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



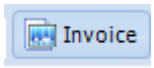
The screen will now be updated with any prices/taxes etc. To remove anything made in error, click on the item you wish to delete then click the **Delete** button. Once you have added all sundry items required, click **Save**.

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

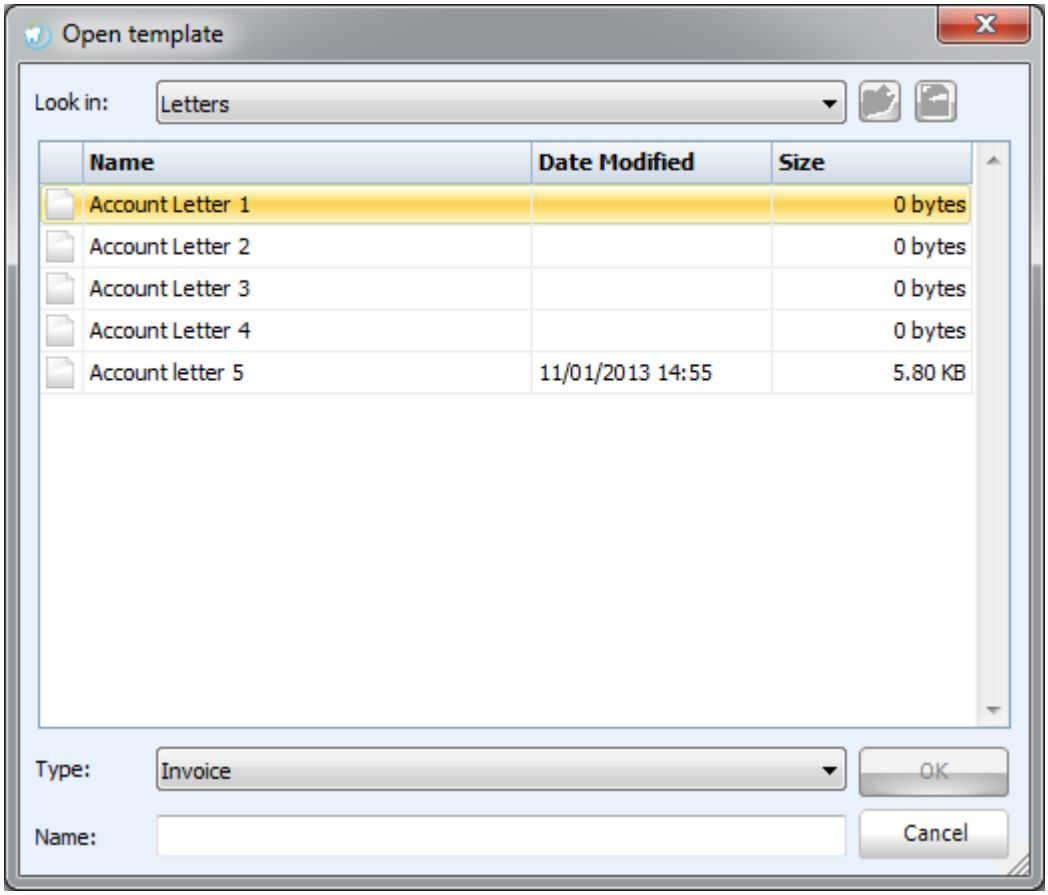
Date	Type		Age	Charge	Payment	Allocated	Balance	Description
11/01/2013	CHG			30.00		30.00	0.00	Charge
11/01/2013	W/O				30.00	30.00	0.00	
11/01/2013	SI			25.00		0.00	25.00	Tooth Whitenening Kit

Invoice

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



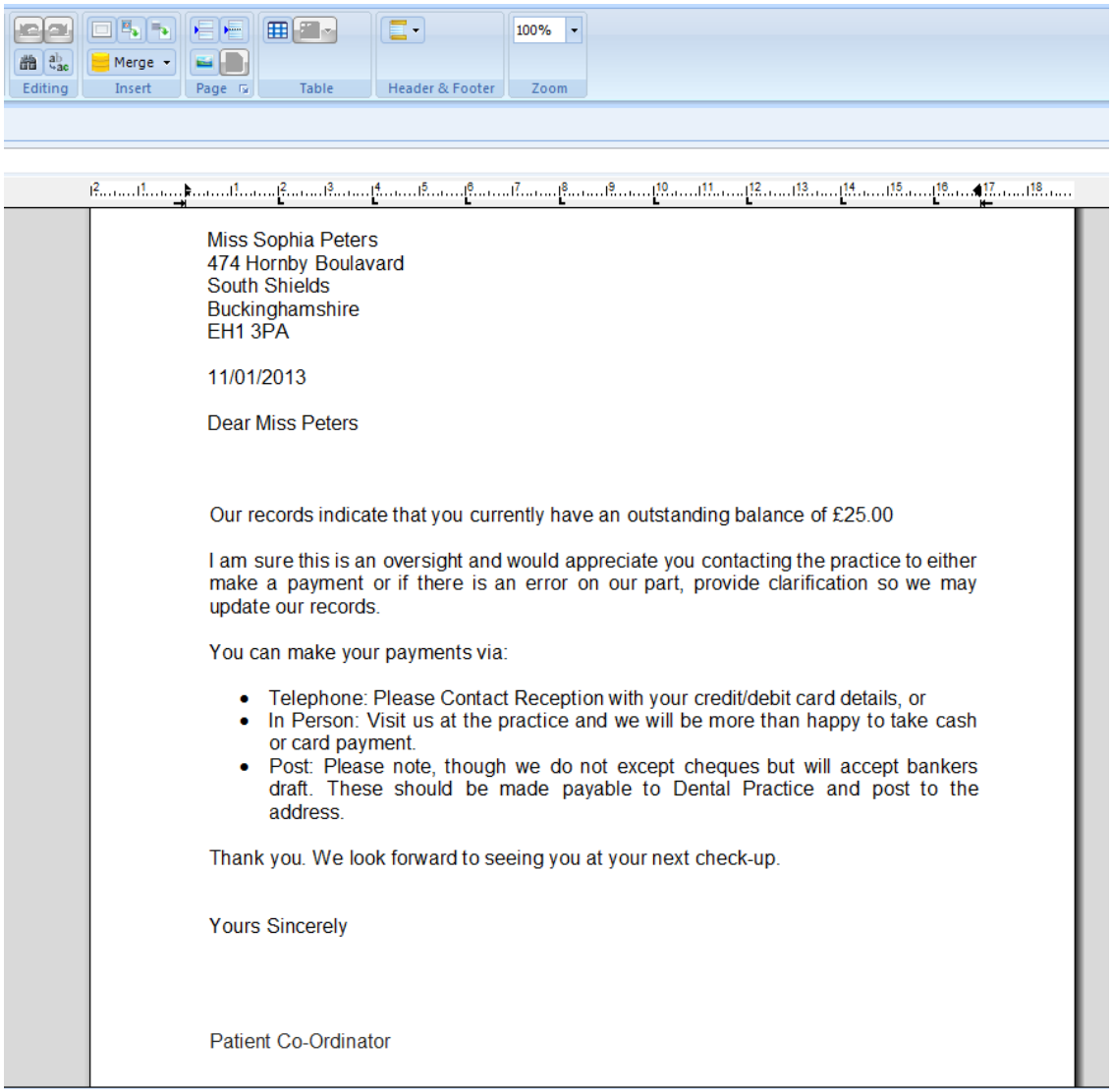
After clicking **Invoice** you will be presented with a choice of your invoice templates (example below).



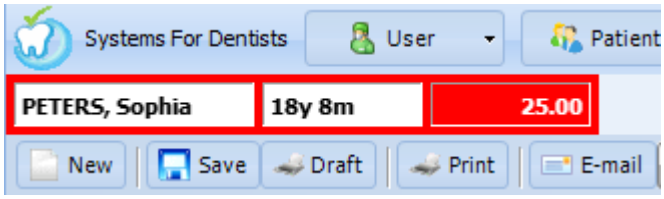
Click on the desired template, and then click the **OK** button to create your template.

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

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



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



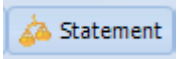
By clicking the **Save** or **Email** buttons, this saves a copy of the invoice to the **Patient Correspondence** section of the patient record (featured later in this chapter).

Statements

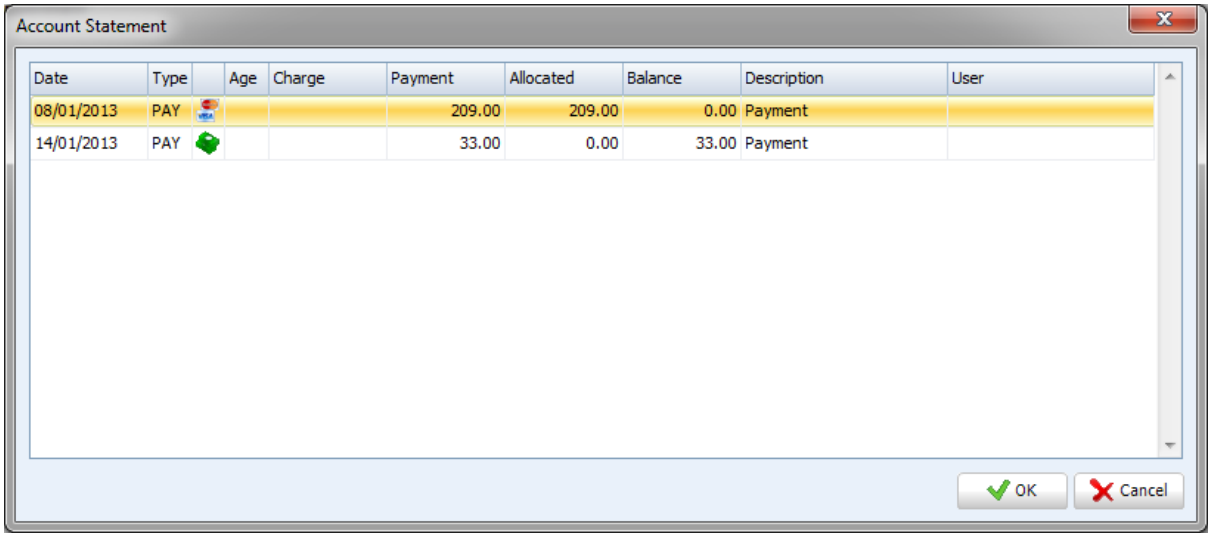
It is useful to provide your patients a breakdown of their treatment and costs associated with each treatment item. SFD v6 makes it very easy to do that.

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

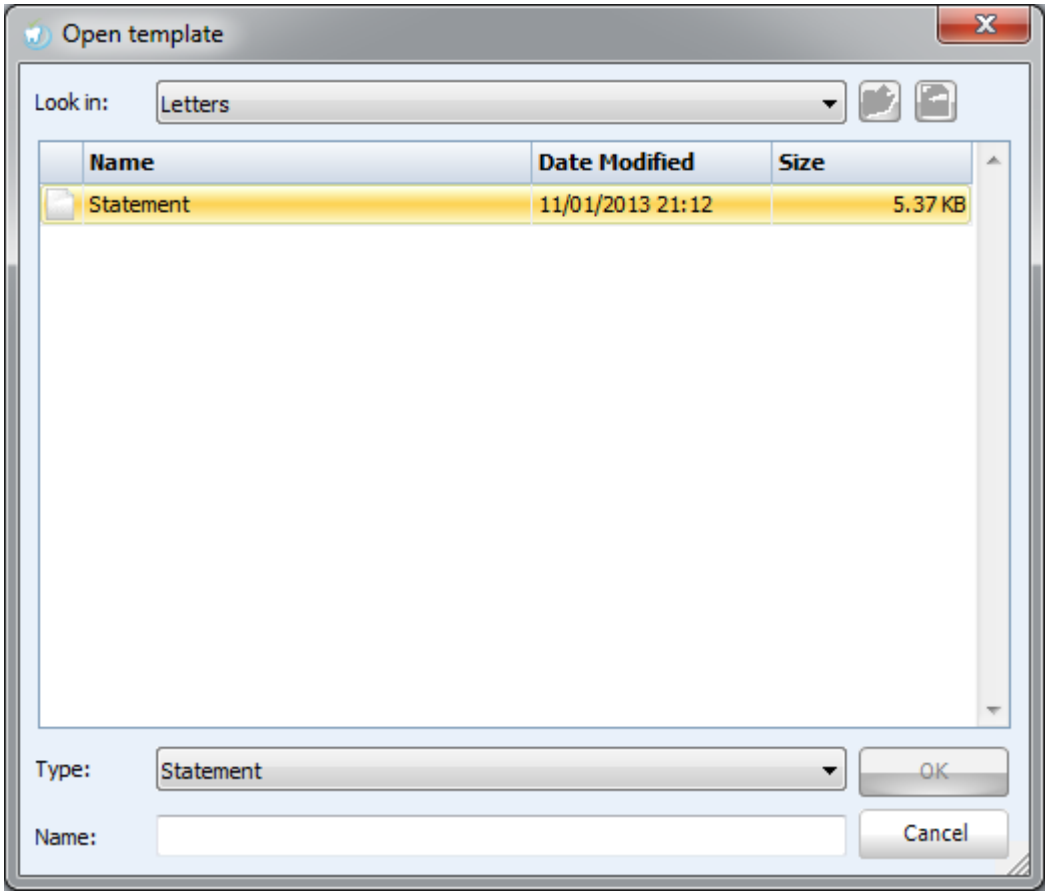
The 1st statement option with the "scales" icon is the traditional statement.



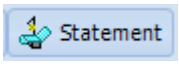
This allows you to print a full statement of account. Once you click this button a grid will be shown, offering you the ability to select the starting point of the statement.



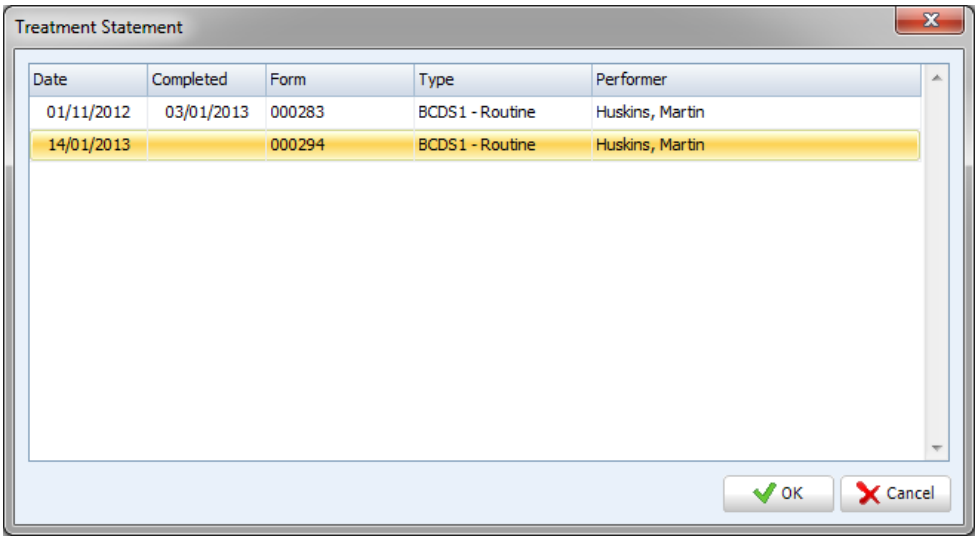
Once you have selected the starting point and clicked **OK** you will be offered a choice of template.



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



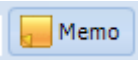
This is a treatment form statement. When you click this button it will ask you to select which treatment form you would like to print the statement from.



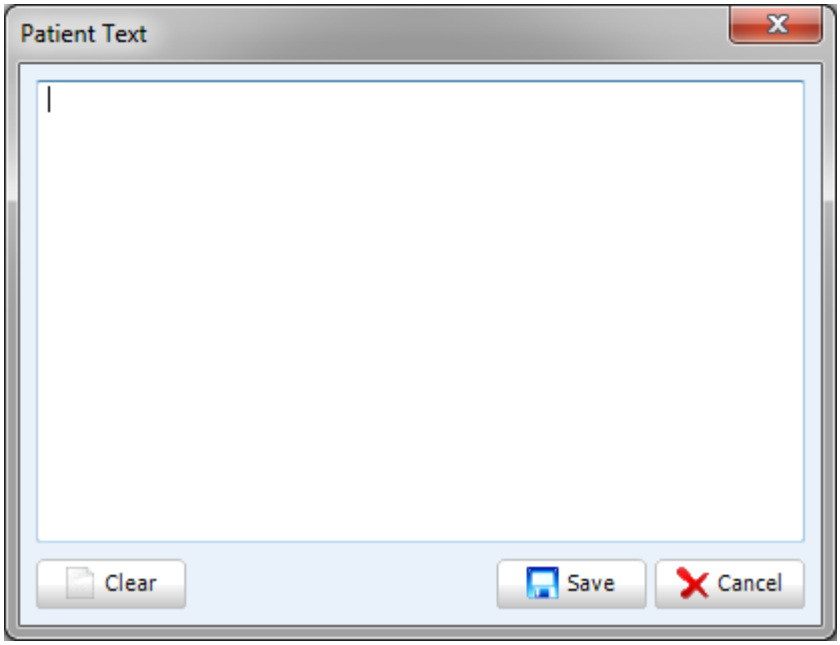
This statement will only include items from the selected treatment form. As such this option is useful for patients needing to make insurance claims for their dental treatment.

Memo

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

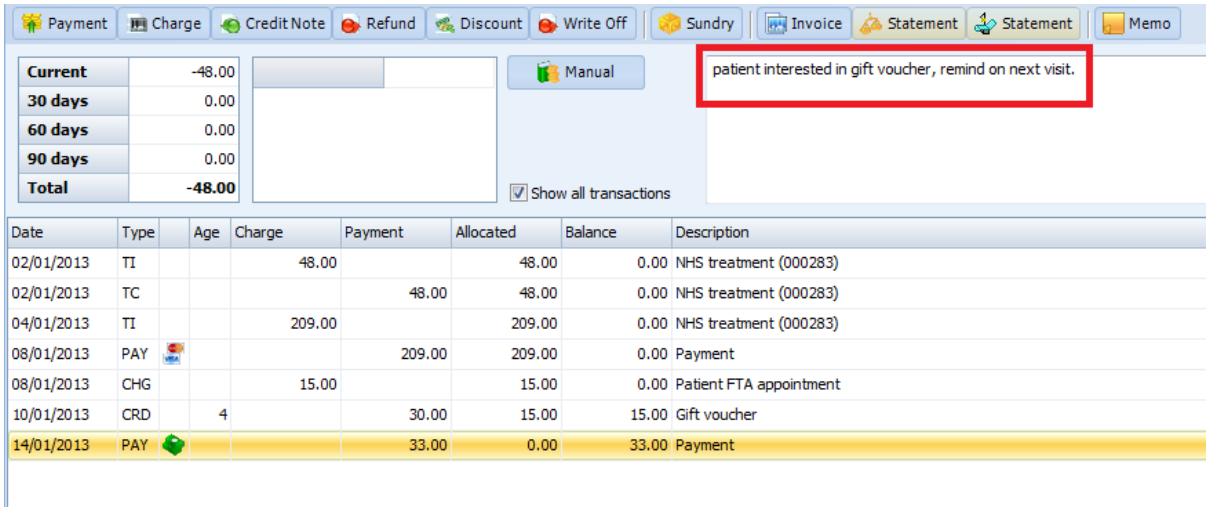


Once you click the **Memo** button you will be presented with the following window.



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

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

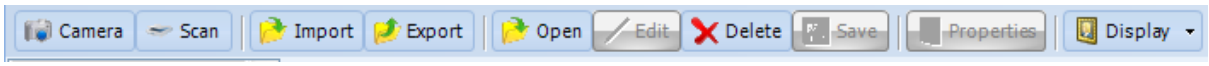


To clear the memo, click on the **Memo** button then click the **Clear** button in the bottom left hand corner.

Images

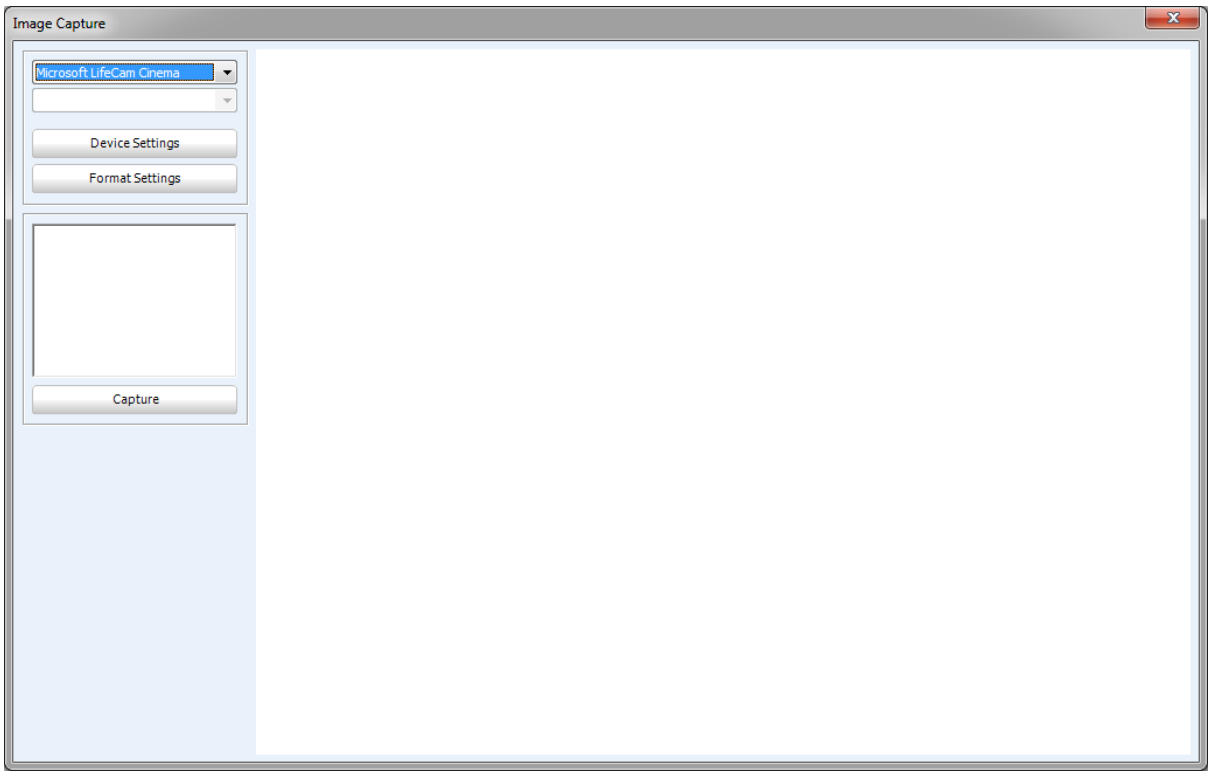
SFD v6 has its own dedicated section for images within the patient record. To access this, click on the **Images** button.

The images section is useful for storing things such as X-rays. There are a number of features available within the Images section of the patient record. These are displayed across the top of the screen.



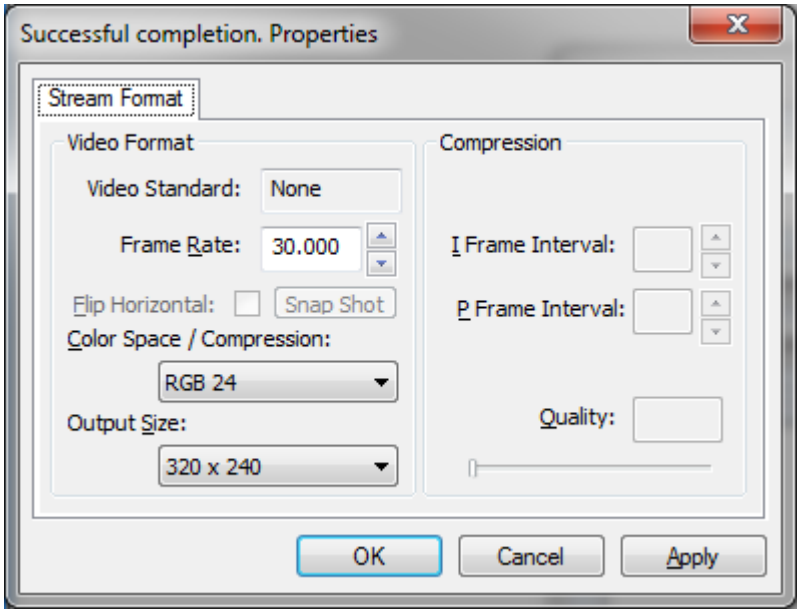
The first button is **Camera**, this allows you to capture an image from any camera device you have attached to your PC and import it straight into the patient record. To use this feature click on the **Camera** button.

The **Image Capture** window appears.

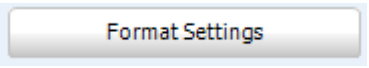


The top dropdown menu is to select your source if you have more than one camera installed on your PC. Once you have selected your camera source you can check the camera settings by clicking the **Device Settings** button.

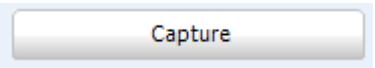
From the window that appears you can make any alterations you feel necessary to suit your needs.



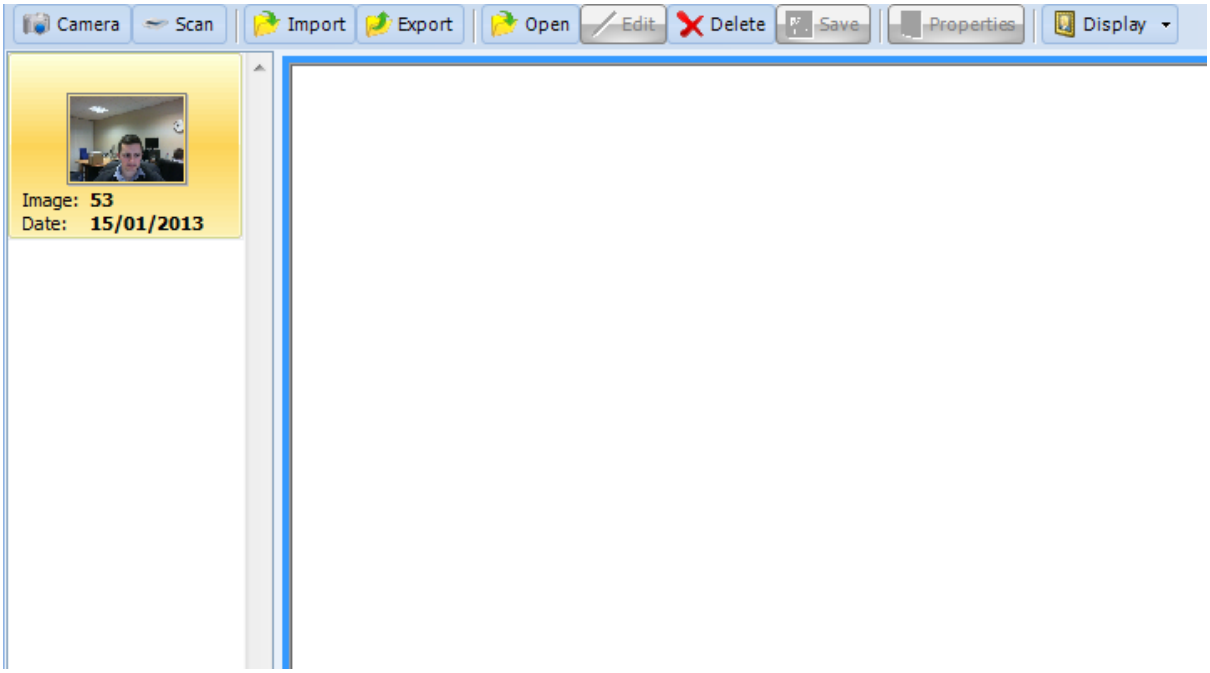
You also have the ability to change the **Format Settings**.



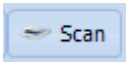
To take your picture, click on the **Capture** button.



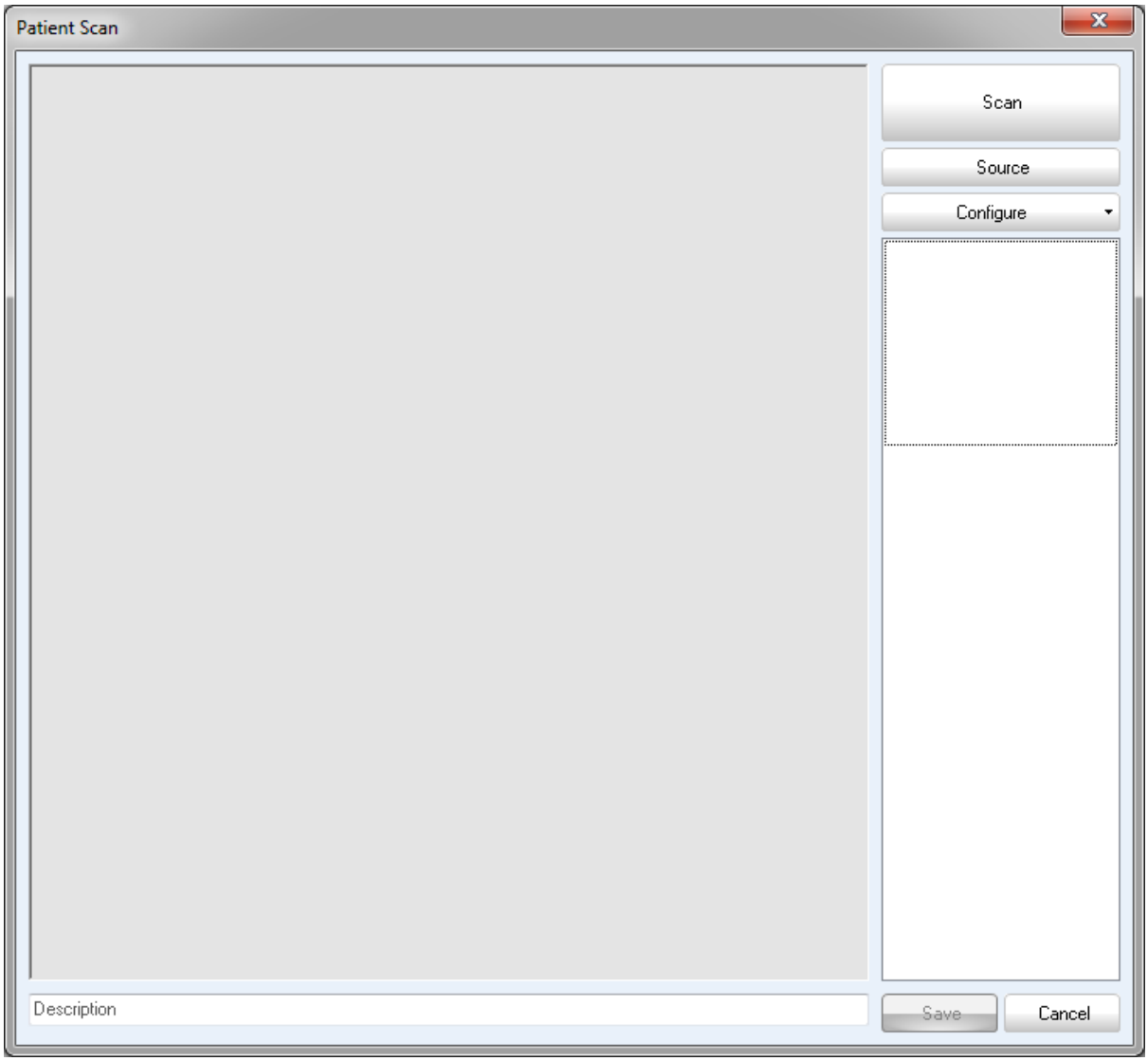
Once you have clicked capture the image will then be stored in the main patient Images screen (example below).



The next button within the patient **Images** section is **Scan**.



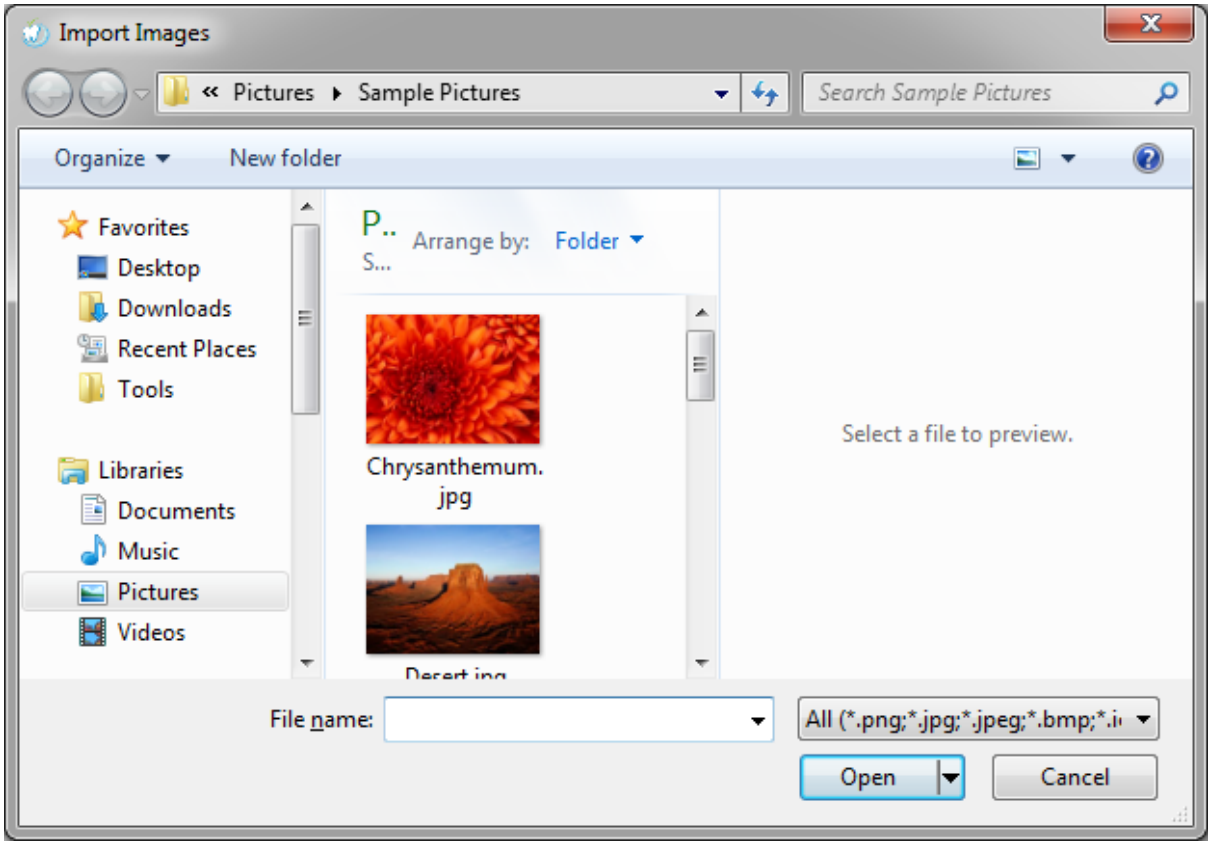
After clicking the **Scan** button, the **Patient Scan** window appears. From this window you have the ability to select your scanning source and make any configuration amendments that are necessary.



Once you are happy with your source and configuration, click the **Scan** button to take the image from the scanner. Once the image is scanned it will be displayed in the window pictured above. You can then add a description in the text box at the bottom of the window. Once you are happy with the image click the **Save** button in the bottom right hand side of the window.

If you have an image saved on your PC that you wish to add into the patient images section you have the ability to **Import**.

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

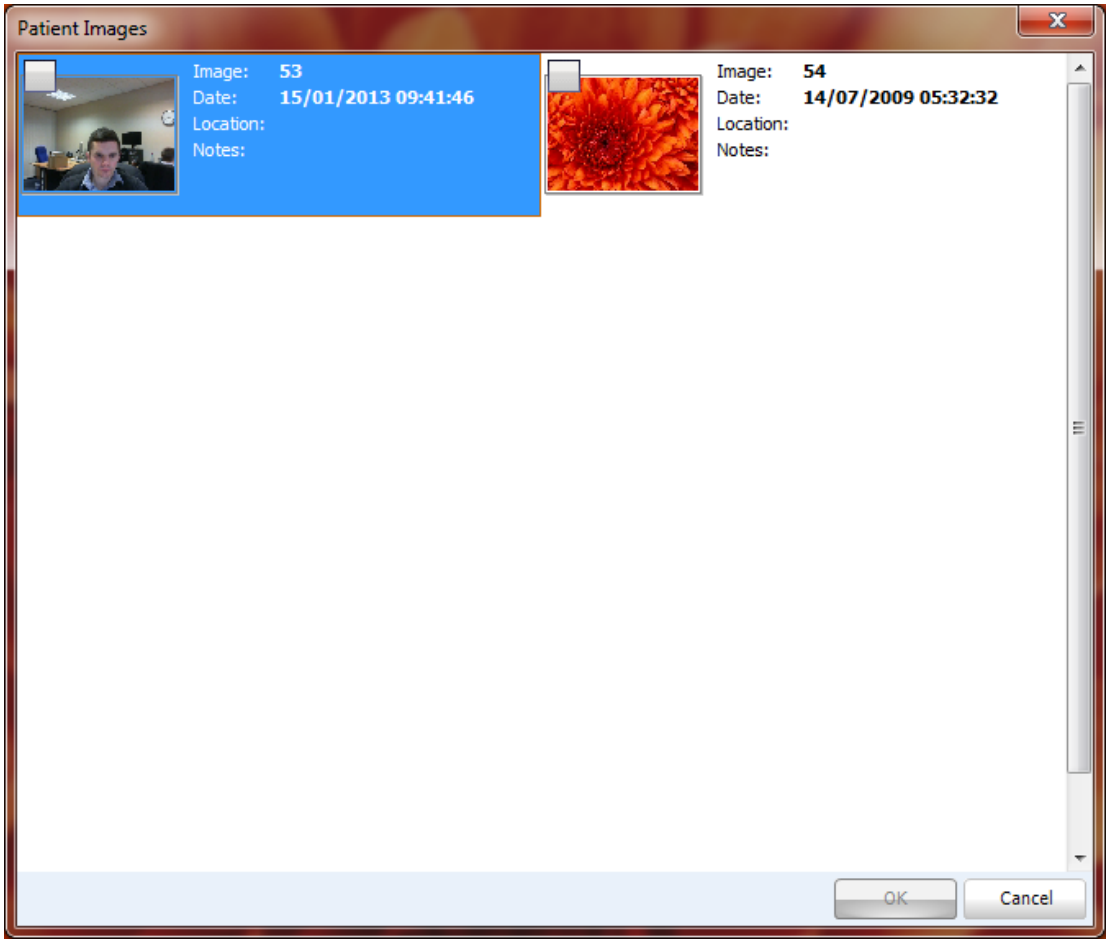


Navigate to the desired image, highlight the image by left clicking on it then click the **Open** button to import the image.

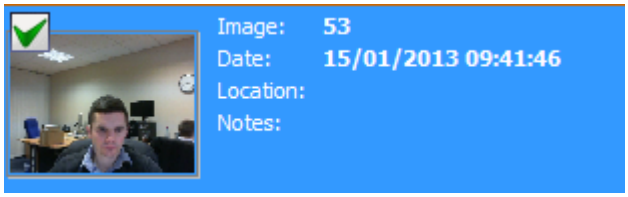
Similar to the **Camera** and **Scan** features, the image is stored in the left column until you either **Open** or **Delete** the image.

You also have the ability to **Export** any images that you have stored in the patient images section of the program.

Once you have clicked the **Export** button you will be presented with the following screen.

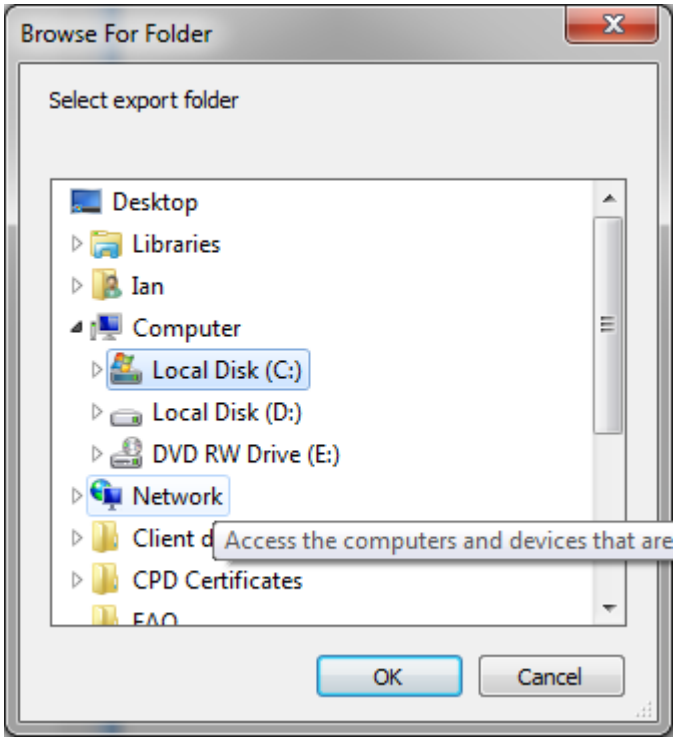


Select the image you wish to export by clicking the grey checkbox in the top left hand corner of the image. Once you have selected the image a green tick appears in the green box.



Once you have selected all the images you wish to export, click **OK** in the bottom right hand corner of the window.

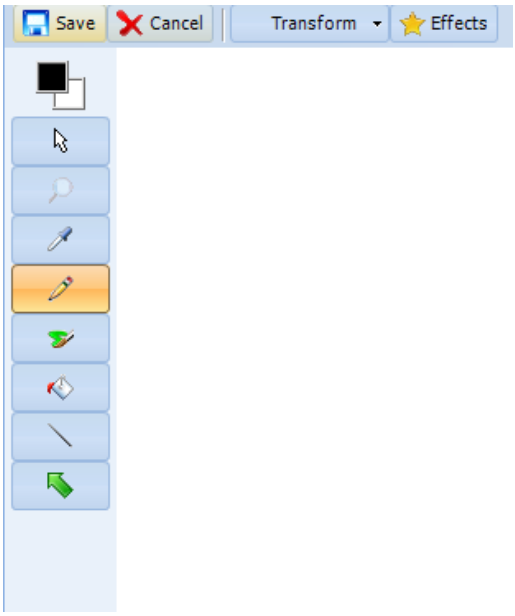
After you've clicked **OK** you will be asked where you wish to export your image(s) to.



Click **OK** to confirm the destination of the exported image(s).

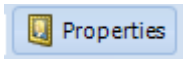
Once you click the **Open** button and select an image from the main **Images** screen you have the ability **Edit** then **Save** any changes that you make to the image.

The **Edit** window is shown below. From this window you have the ability to transform the image and add effects to the image.

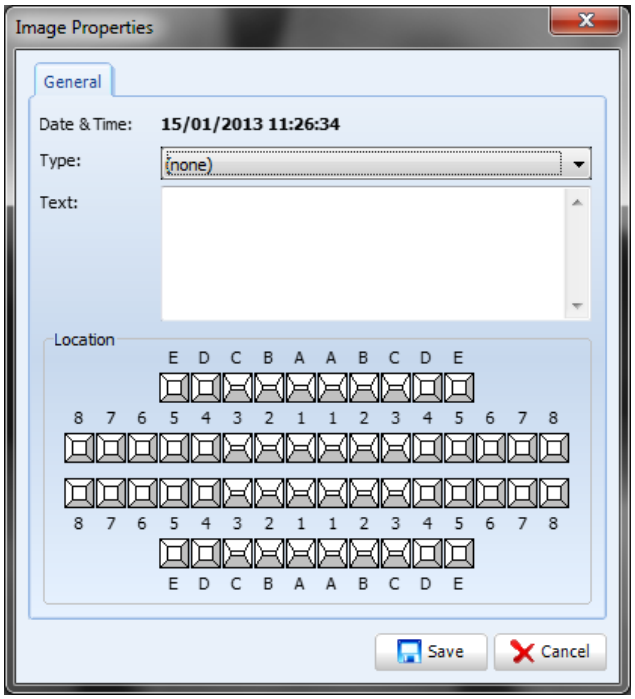


Once you have finished editing click the **Save** button in the top left of the screen to commit the changes made.

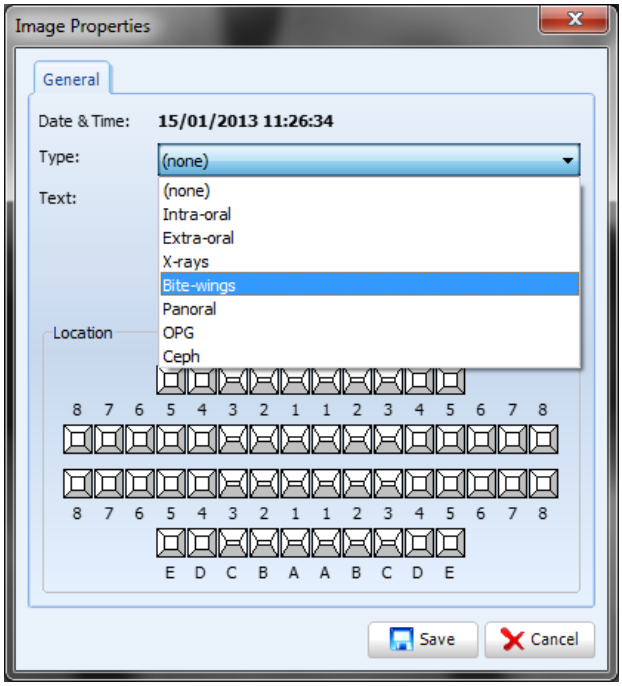
A very useful feature in the patient image section is the **Properties** button.



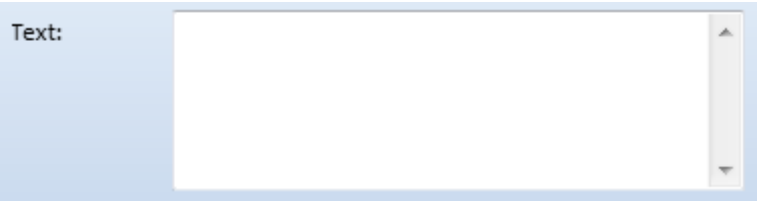
To activate the **Properties** button you have to open an image. Once you have opened the image and clicked the **Properties** button you will be presented with the following window.



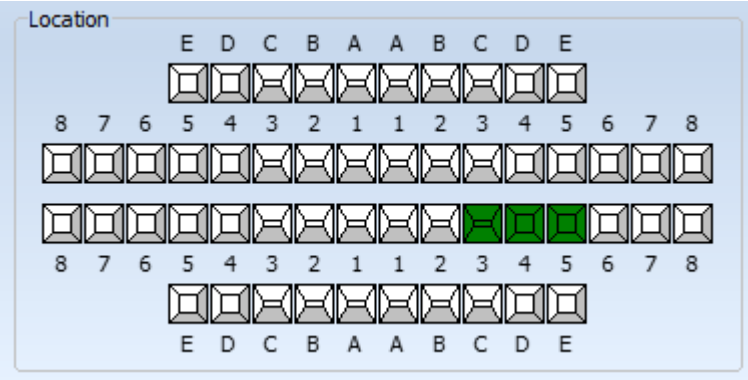
From this window you can select the type of image from the top dropdown menu (bitewings in this particular example).



Then you can add any notes for the image in the text box.

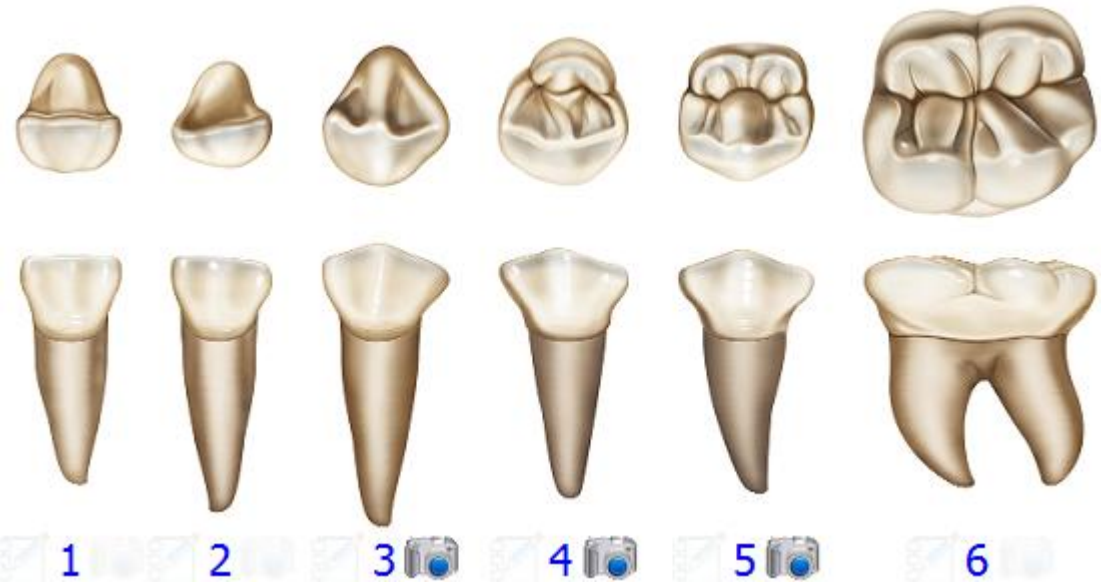


Finally you can select the location of the image. Click on the teeth in the chart that the image relates to.

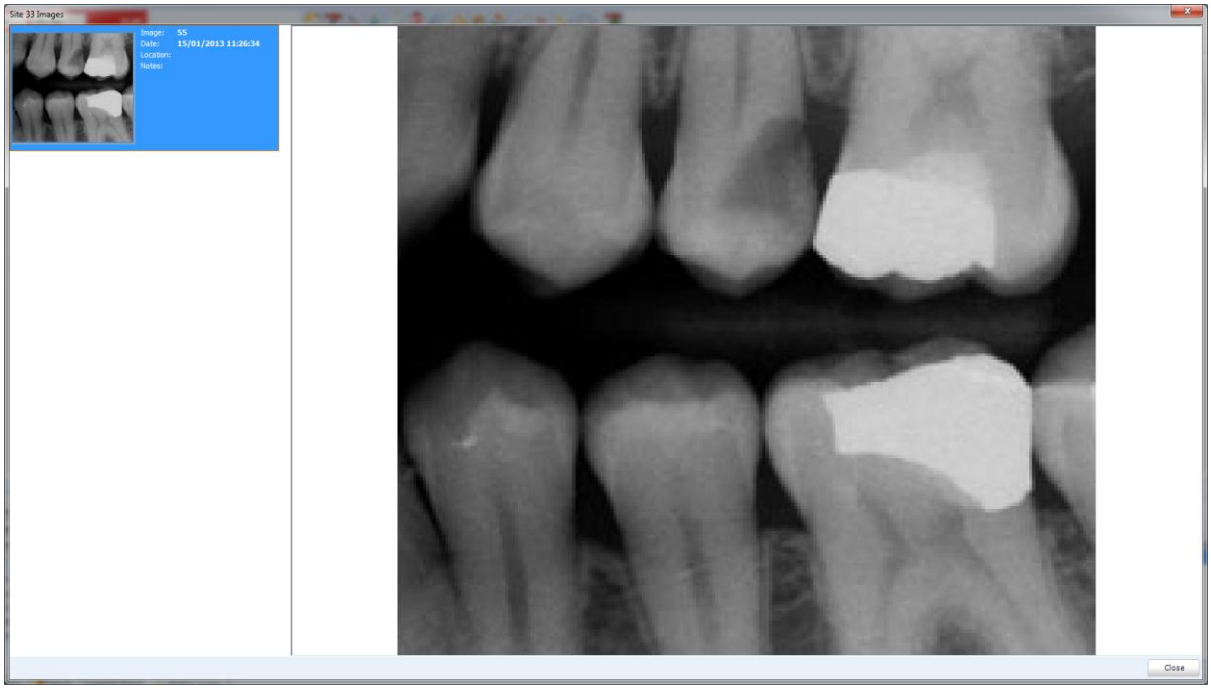


Click **Save** to confirm.

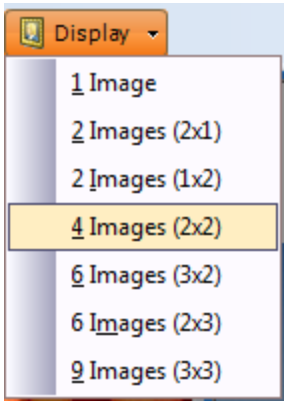
Now when you go to the patient's treatment, and open a treatment form you will be able to access the image you have assigned to certain teeth.



The camera icon is now activated on the teeth the image was assigned to. Click on the camera icon to see the image.



SFD has a feature which allows you to compare multiple images on screen. To do this, click on the **display** button, a dropdown appears (demonstrated below). Select the amount of images you wish to compare (the maximum being 9).



For example if you choose "2 images (2x1)" this will present two boxes side by side.

To add an image, double click on box you wish the picture to be displayed in. A window will now appear with all of the patient's images, select which one you wish to compare. Repeat this process to view any other images simultaneously.

The images are now present on the screen for comparison.

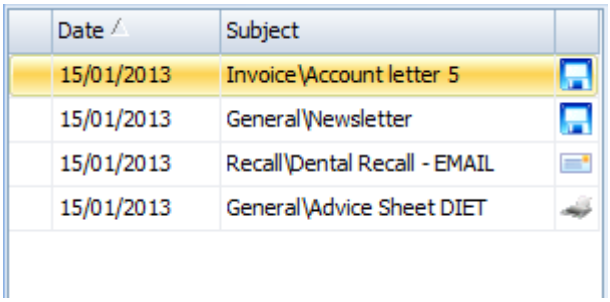
Correspondence

Correspondence is the next section within the patient record.

This is the section of the patient record where all letters, receipts, appointments cards etc. generated for the patient are stored.

This is what the correspondence window looks like.

In SFD v6 you have access to every document either sent to or saved for a particular patient. These documents are visible in the grid on the left side of the correspondence screen (example below).

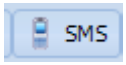


This grid provides you with the date the document was created, the name of the document and what was actually done with the document.

- This icons shows that the document was only saved.
- This icon shows that the document was emailed to the patient.
- This icon shows the document was printed.

If you have an SMS account with us you have the ability to send SMS messages directly to patients from the **Correspondence** section of the patient record.

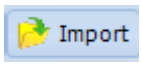
To do this, click on the SMS icon towards the top of the screen.



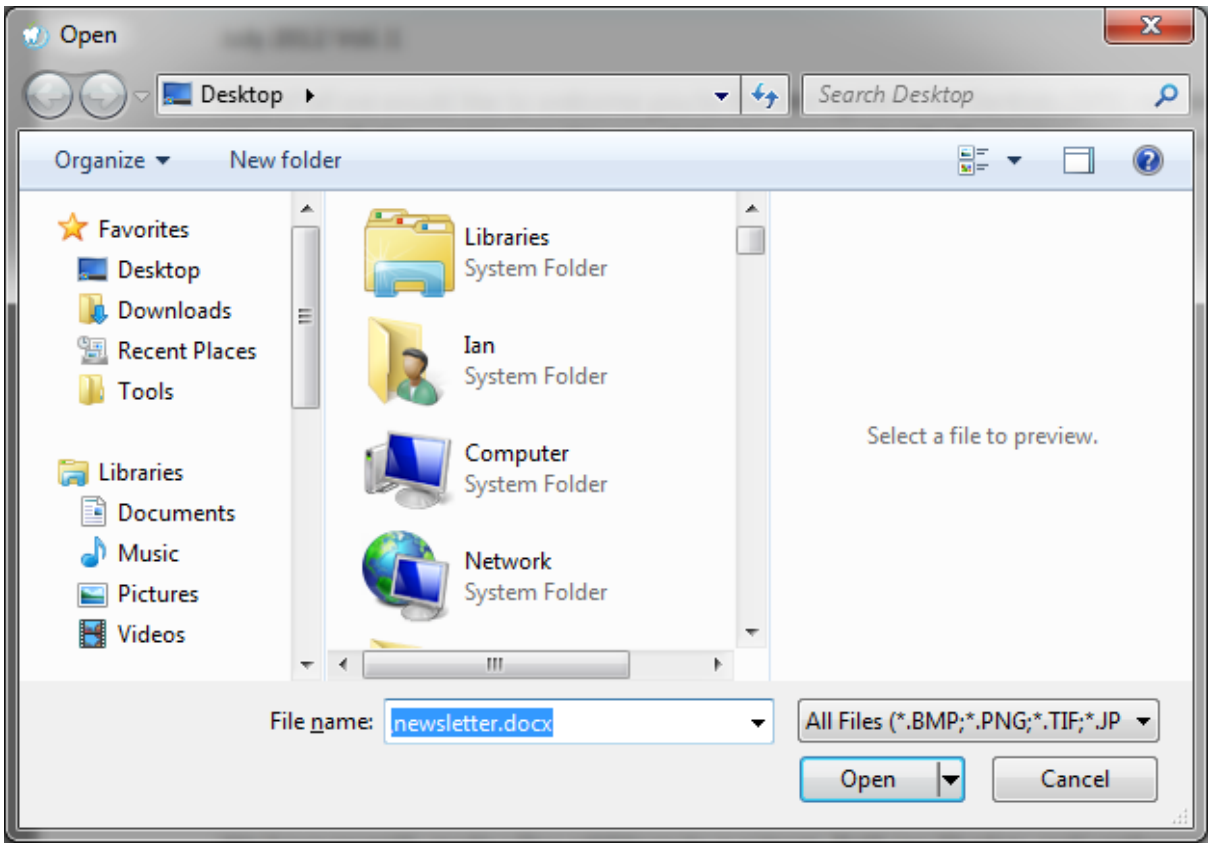
You will then be presented with a text box where you can type the contents of your SMS into. To send the message, click OK.

If the SMS feature is something that interests you, email sales@sfd.co or alternatively call 0845 643 2828 to find out more.

You also have the ability to import documents from external programs (as long as they are the correct format). To do this, click on the **Import** button at the top of the screen.

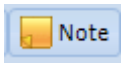


Once you have clicked the **Import** button you will presented with a window similar to the one below.

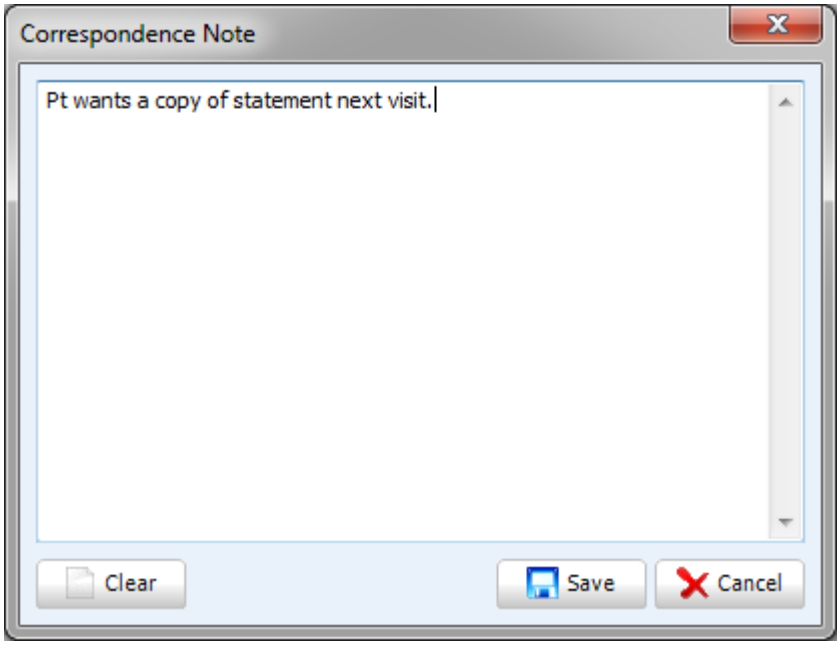


Select the document you wish to import, and then click **Open** in the bottom right hand corner to confirm. The imported document will now be stored in the left hand column with all the other letters and documentation for that patient.

You also have the ability to store notes in the correspondence. To do this, click on the **Notes** button at the top of the screen.

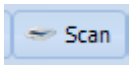


Type your notes into the notes screen that appear after clicking the **notes** button.

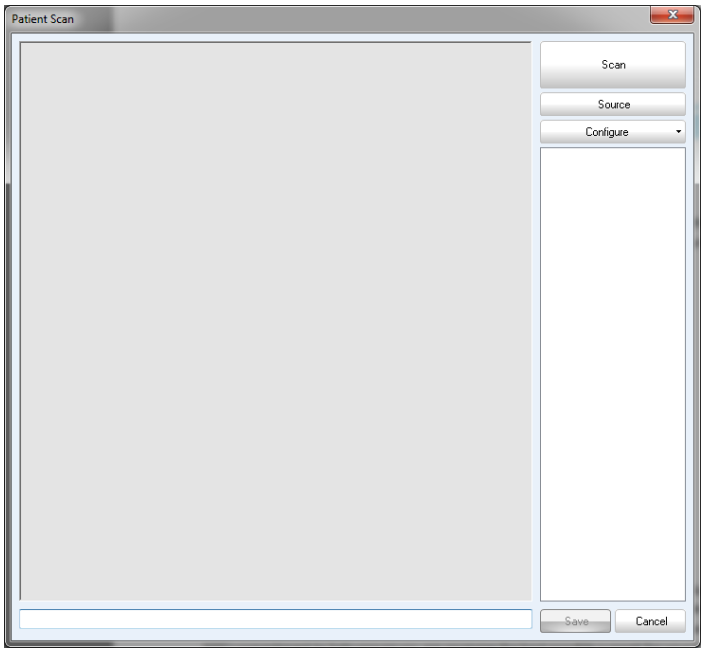


Click the **Save** button to store the note.

Another useful feature in correspondence is **Scan**.

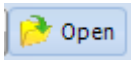


This allows you to scan documents straight into this section so all documents are in a central location. This is useful for things such as paper medicals.

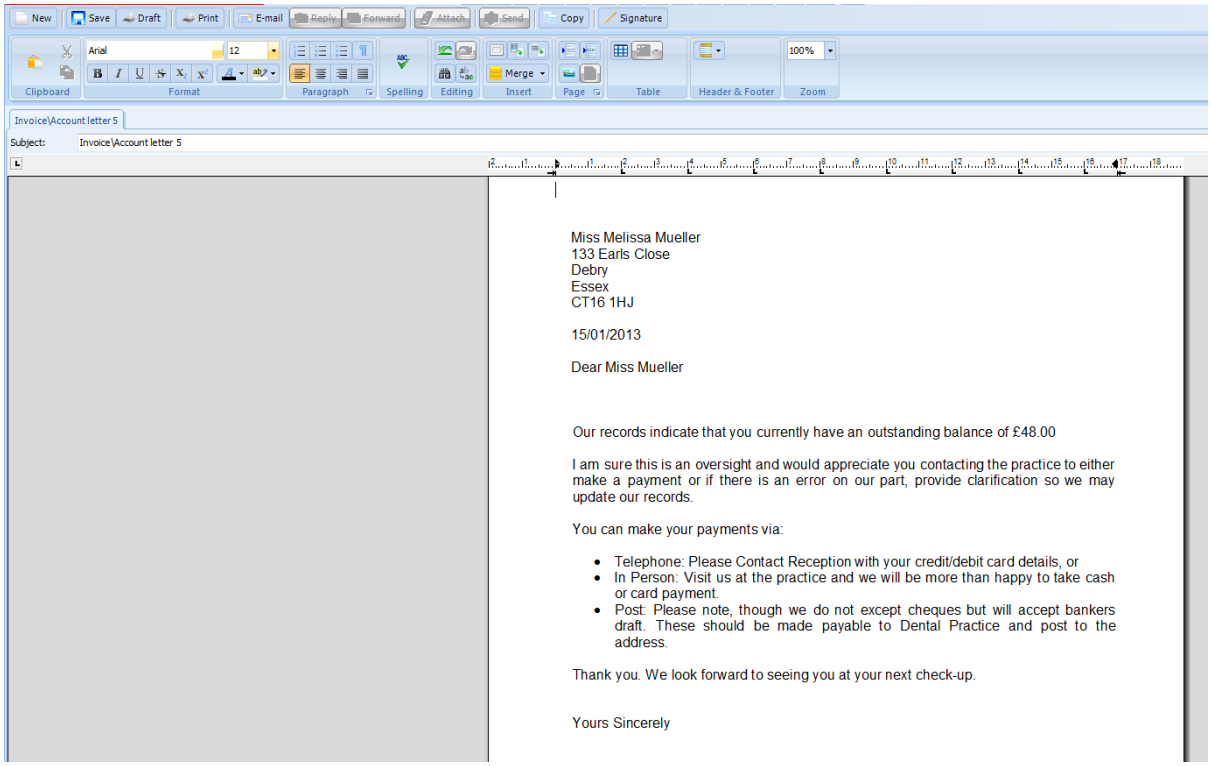


Click the **Scan** button to scan the document. Once scanned add any description you feel necessary then click the **Save** in the bottom right hand corner of the scan window.

If you wish to edit any documents that are in correspondence, double click on the document you wish to edit (It must have the icon), or alternatively click once then click Open at the top of the page.



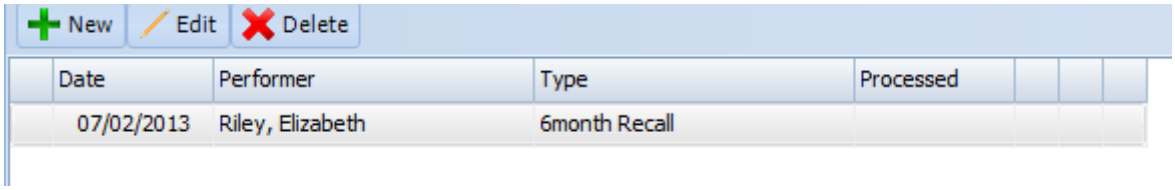
You will be presented with the word processor.



You can now make any amendments to the document you desire. After you have made the necessary amendments you can either, print (this will also be saved in the correspondence section), print a draft, save or email (also saved into correspondence).

You can also check the patients recall(s) dates, this is useful if you want to send a manual recall reminder to the patient. To view these dates click on the **Recalls** button at the top of the screen.

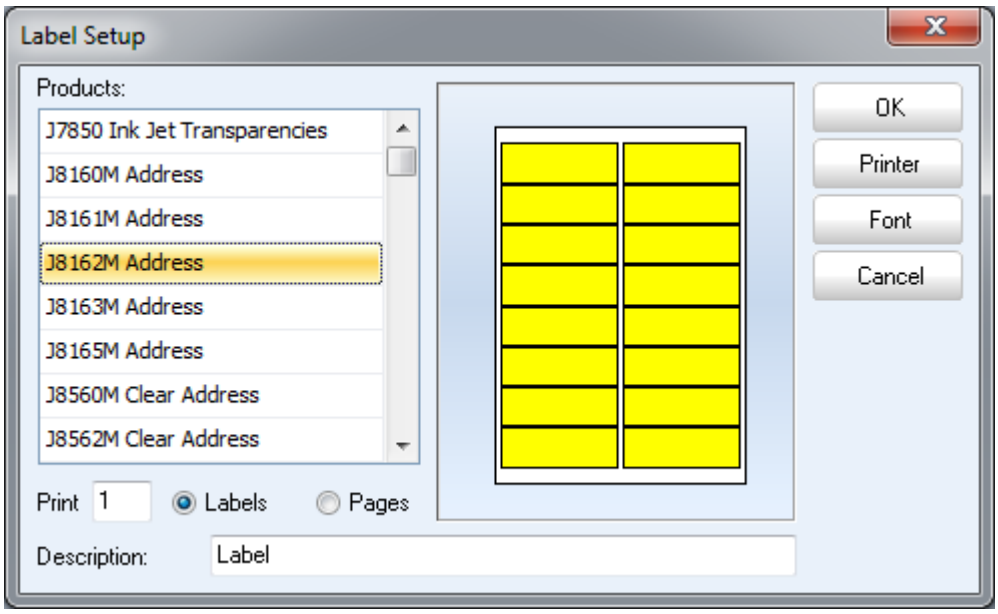
The dates will be displayed similar to the example below.



From this window you can create a new recall date and edit or delete any existing recall dates.

Tip: You have the option to print labels from the correspondence screen. To do this, click on Labels button.

After clicking the **Label** button you will be able choose the properties you require for the labels.

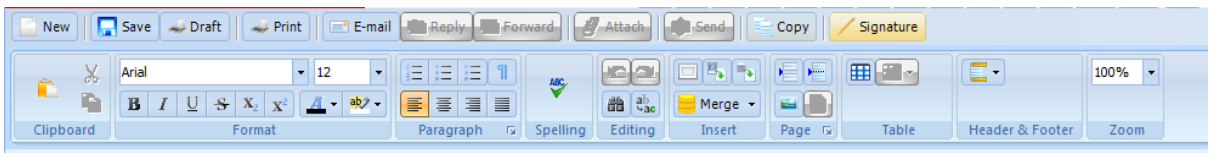


To select your printer, click the **Printer** button. Once you are happy with your selections click **OK** to print.

Correspondence

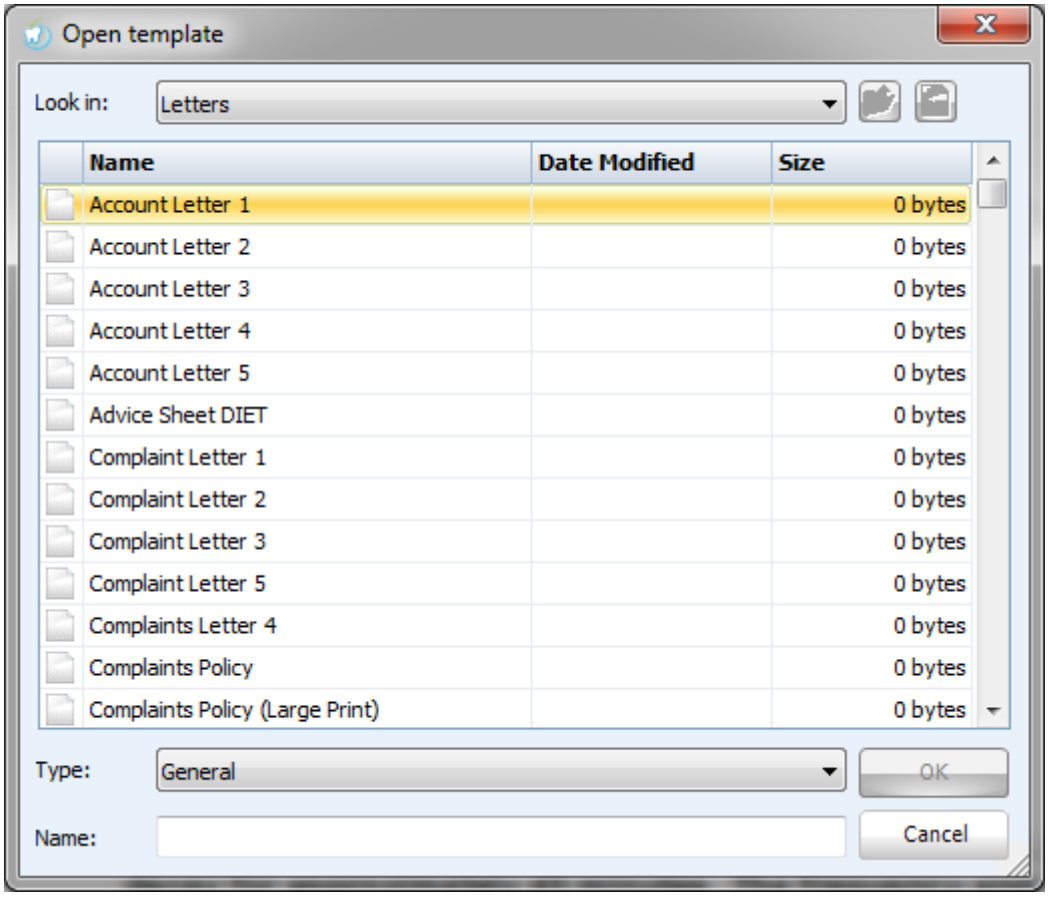
The word processor is something that is linked to the **Correspondence** section. This can be accessed directly by the **Letters** button.

Within this screen you will see everything you would expect from a standard word processor. Things such as paragraph formatting, activate headers and footers, insert image, bullet point etc. The image below shows the ribbon and all the features within it.

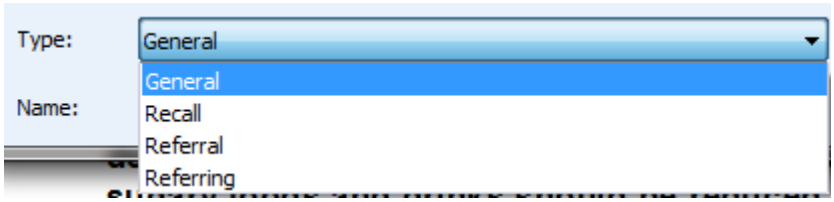


To bring up a document you wish to store in the patient's correspondence or send to the patient, click on the **New** button in the top left hand corner of the screen.

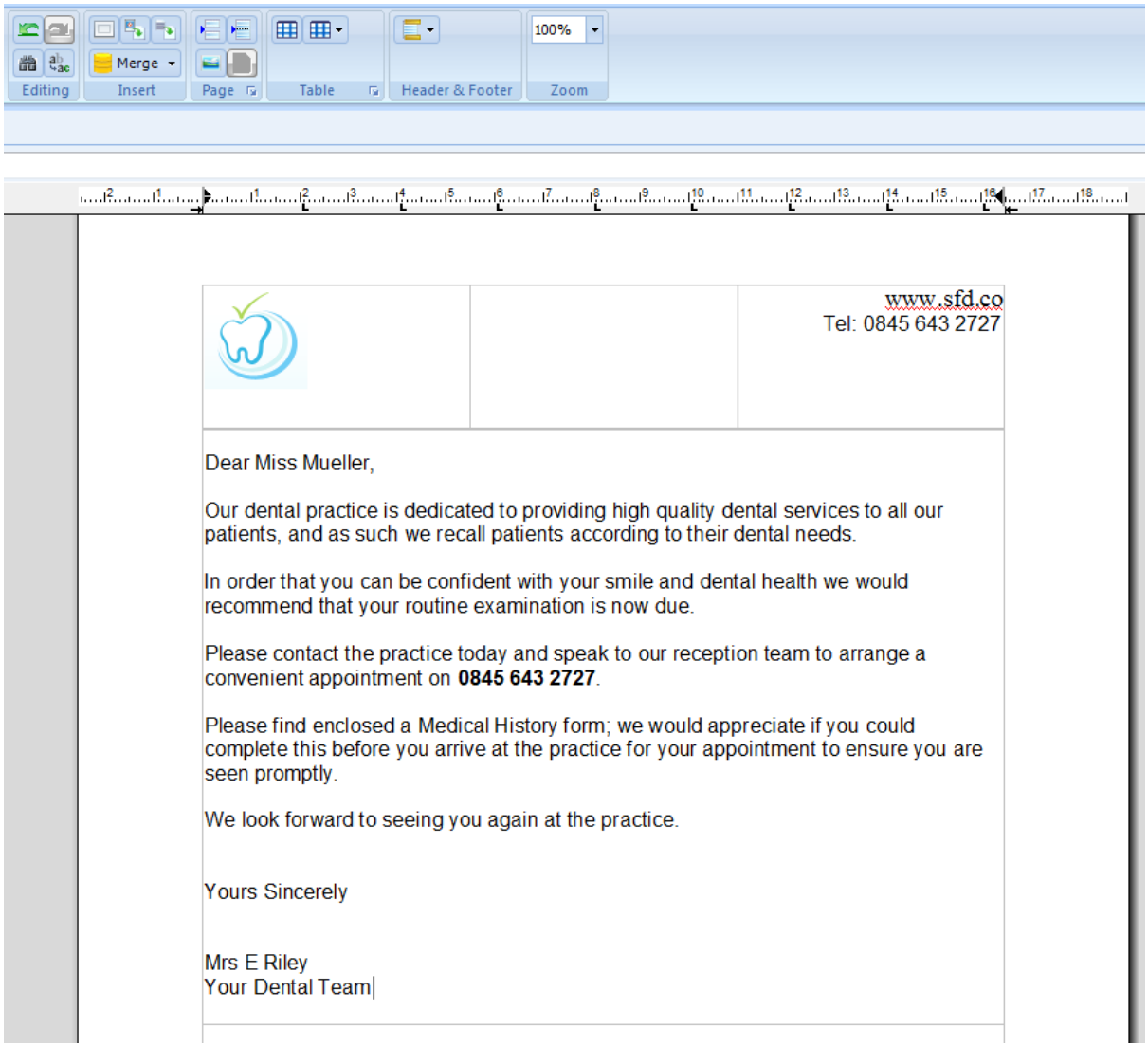
You will then be presented with the following window.



From this window you can select the document you wish to open. You can use the **Type** dropdown to browse through the different categories of documents that exist in your system.

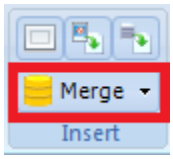


To open the document you can double click on it, or click once then click **OK**. The document will now be open within the word processor.



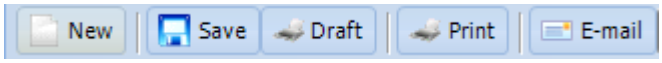
You can now make any alterations you feel necessary.

Tip: You can use the Merge feature to auto fill various patient related properties (refer to Documents Setup).



This generates items such as Patient Title, Patient Name, and Patient Surname etc. Plus more complex items such as next appointment date(s) and outstanding balances. If used correctly, this feature will save you a lot of time.

After making your alterations, choose what you wish to do with the document.

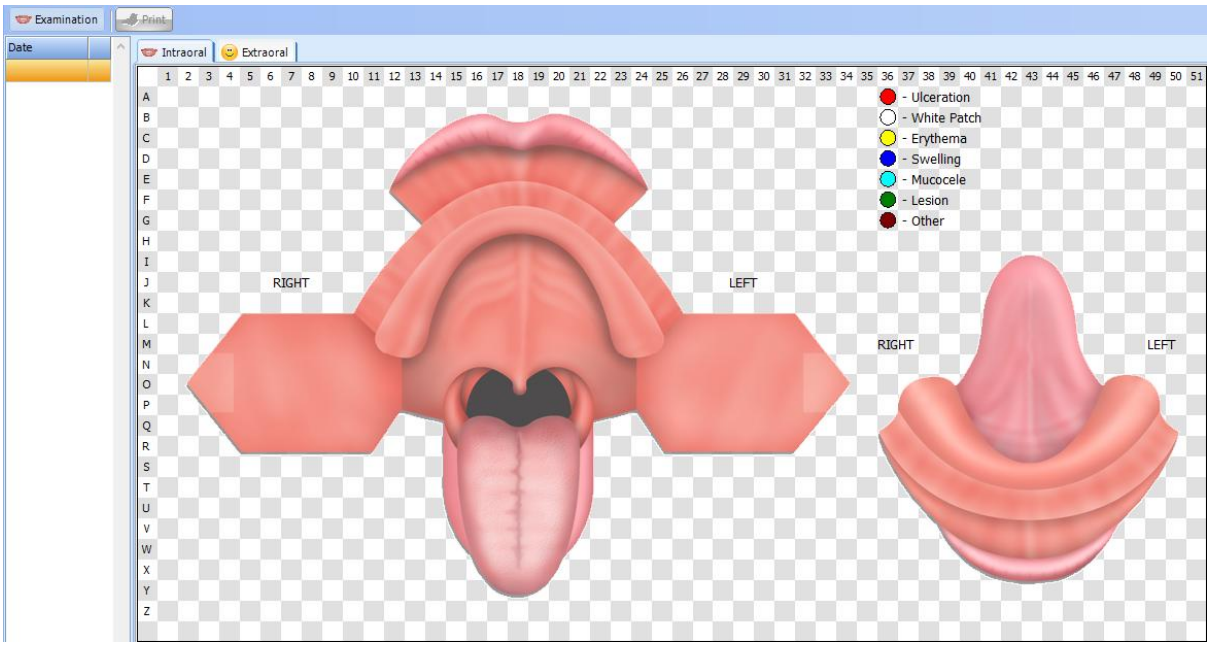


Pathology

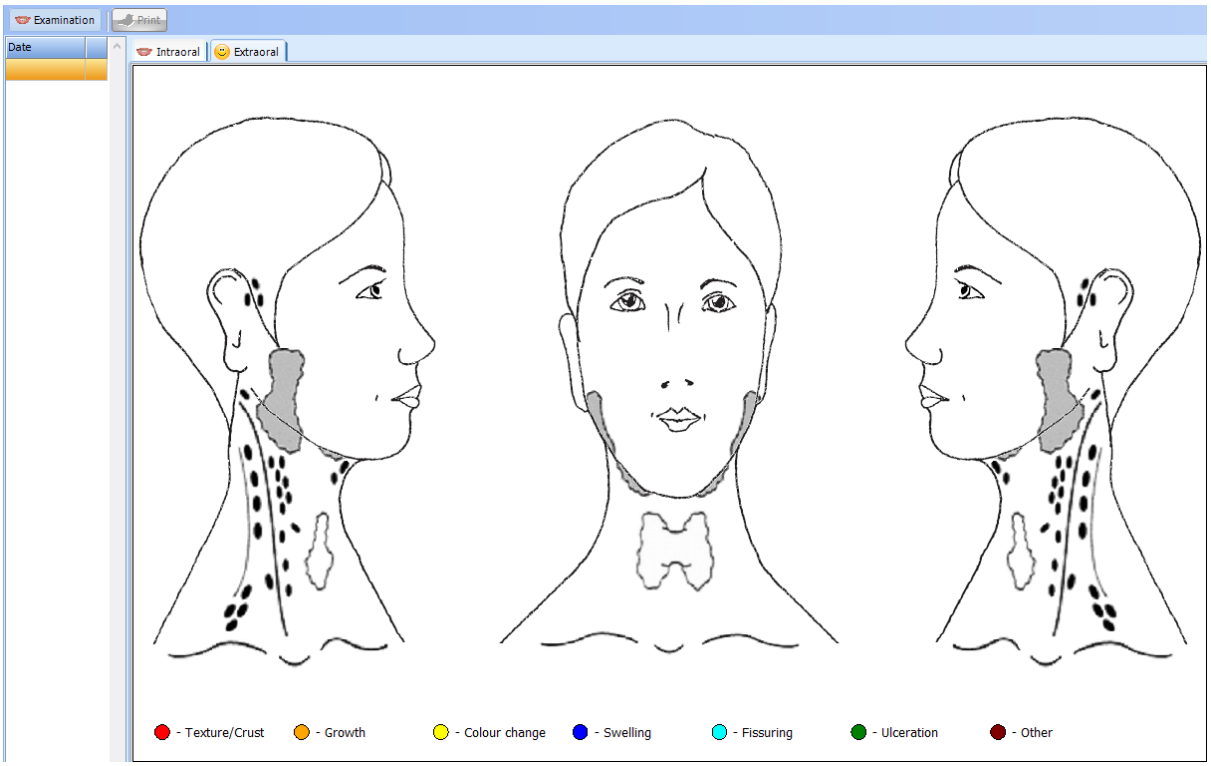
SFD v6 has the ability to store pathology findings within the patient record. To access this feature, click on the **Pathology** button.

The pathology screen is shown below.

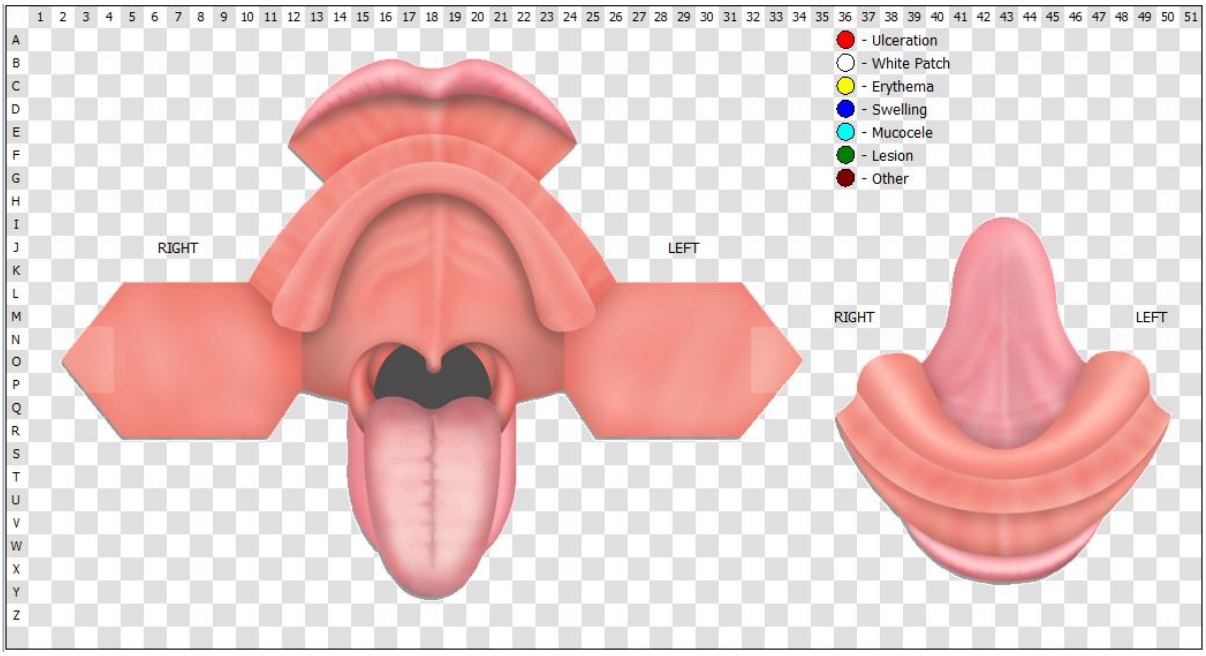
Intraoral



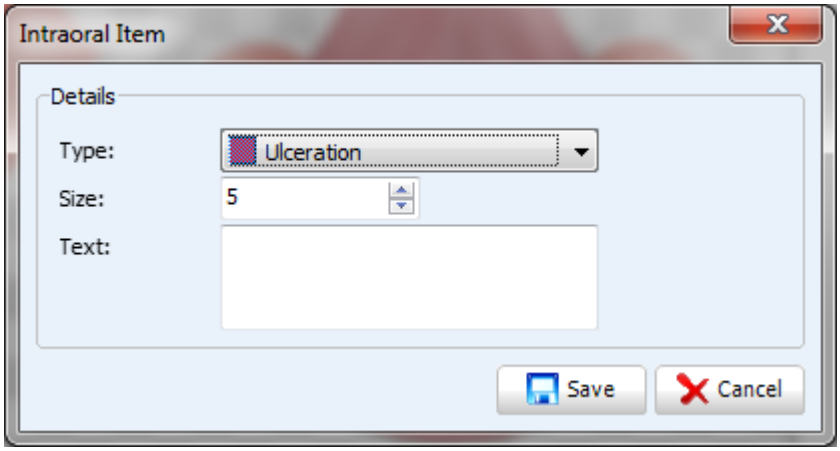
Extraoral



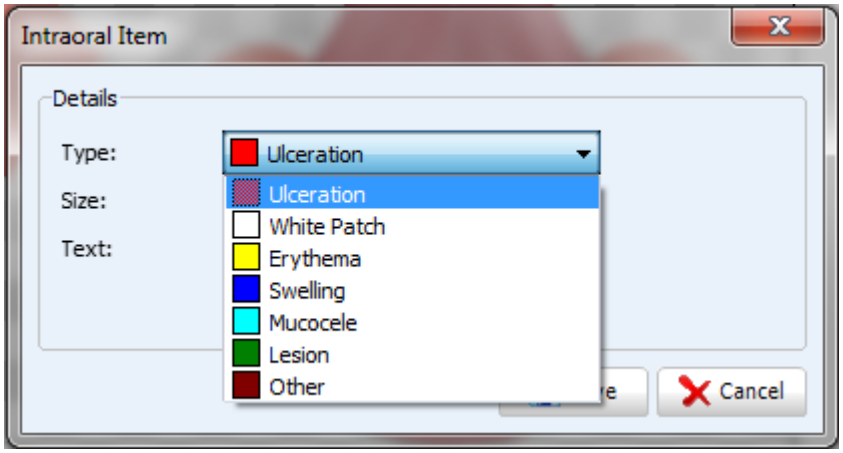
To enter any findings from a pathology observation, click on **Examination**. Click **Yes** to create a new exam. You will then be asked to select the performer, choose this and click **OK**.



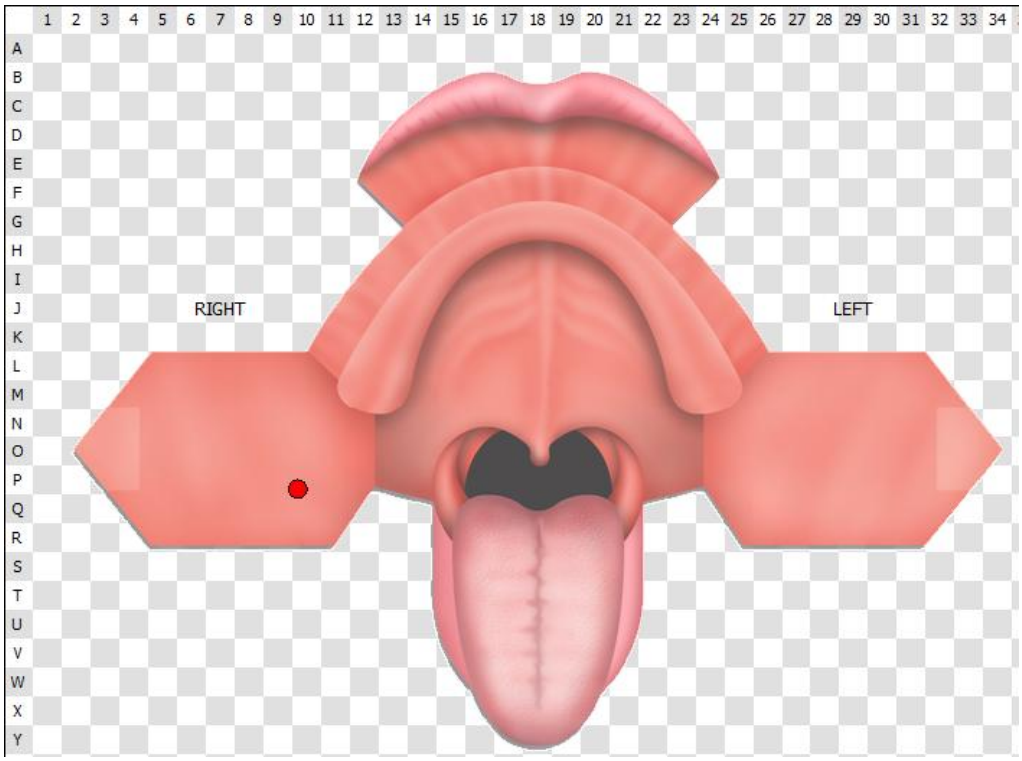
To add an observation, click on the affected area on the diagram (shown above). The following window appears.



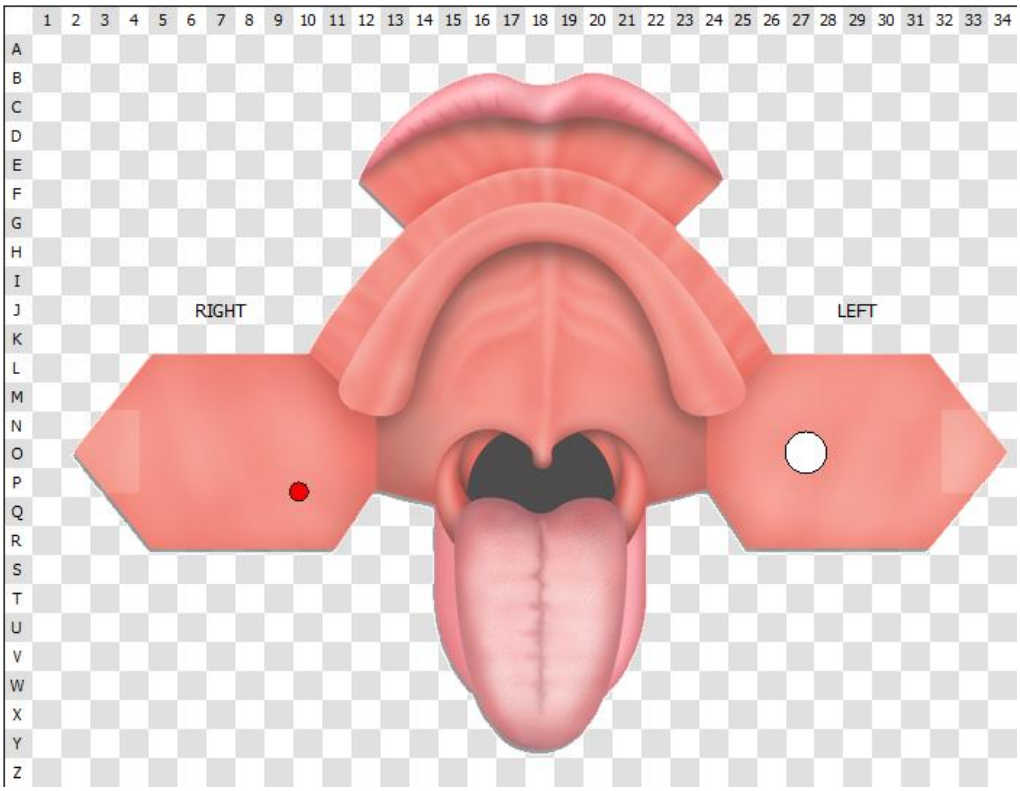
Select what you wish to add by selecting an item from the **Type** dropdown.



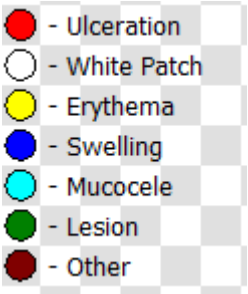
After selecting the **Type** you can chose the **Size**, you can also add any notes into the text box. Click **Save** to add your observation to the chart.



The dots appear larger and smaller dependant on the size you entered.



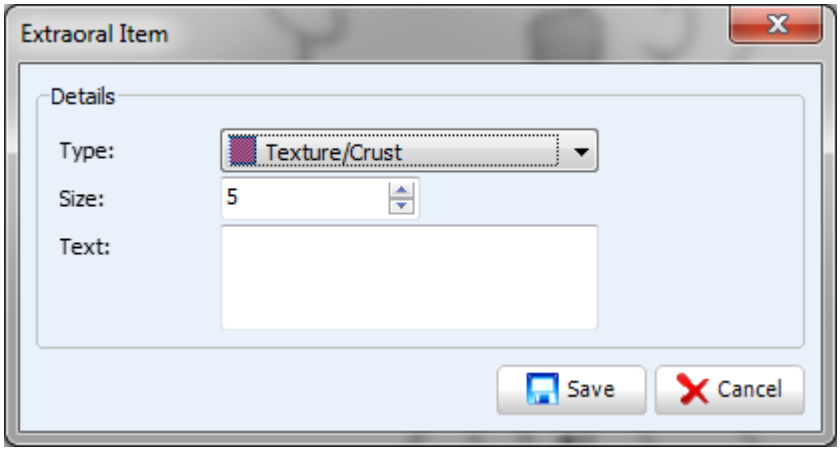
You also have the key in the top right hand corner so at a glance you can distinguish what each colour stands for.



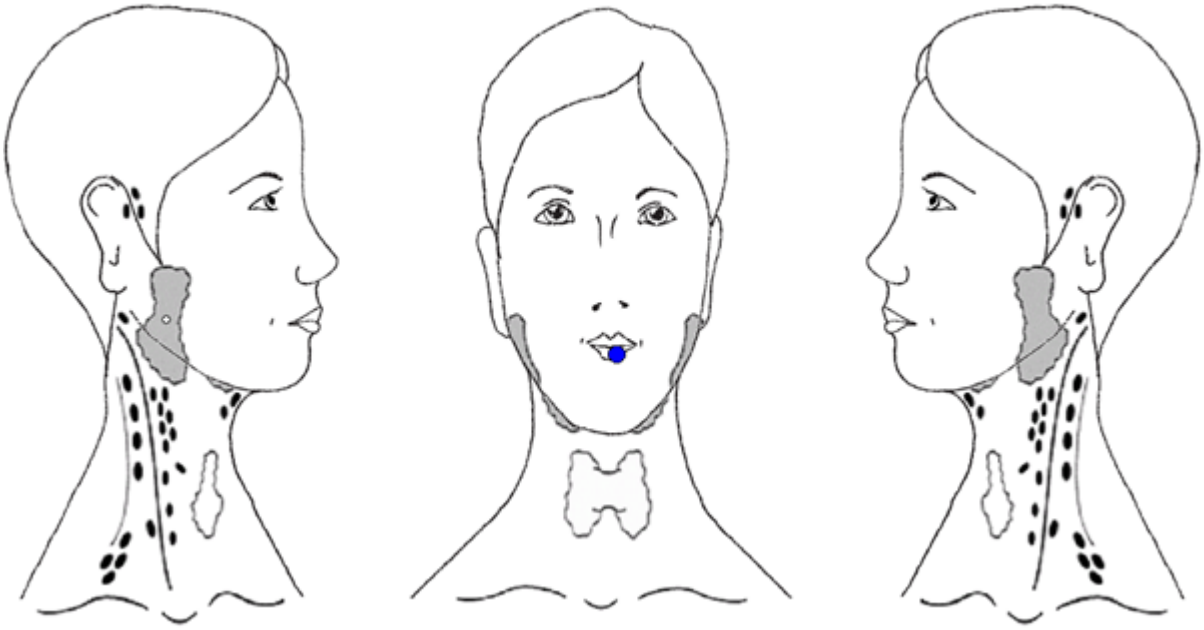
To turn to extra oral view, click on the tab at the top of the screen.

Similar to the intra oral view, click on the area you wish to add your observation to.

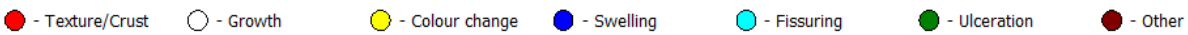
Make your selection from the following window.



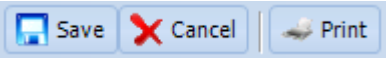
Click **Save** to confirm.



The key is displayed at the bottom of the page for extra oral view.



Once you have added your observations click on the **Save** button in the top left hand corner.



You can also cancel all observations and print out the chart.

This will be stored in the left hand column in the initial Pathology screen.

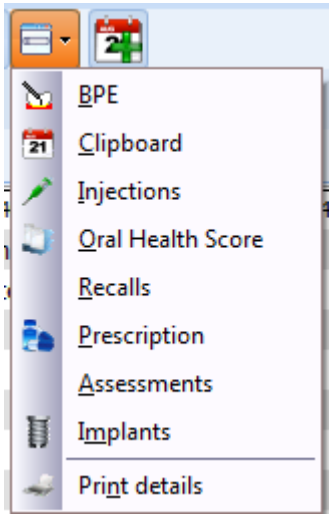
Click on the date to view an observations added on that specific day.

Links to Third Party Software

Systems for Dentists have the ability to link to third party software such as digital radiography. To view programs that we integrate with, view our FAQ article at http://sfd.co/faq/157.html

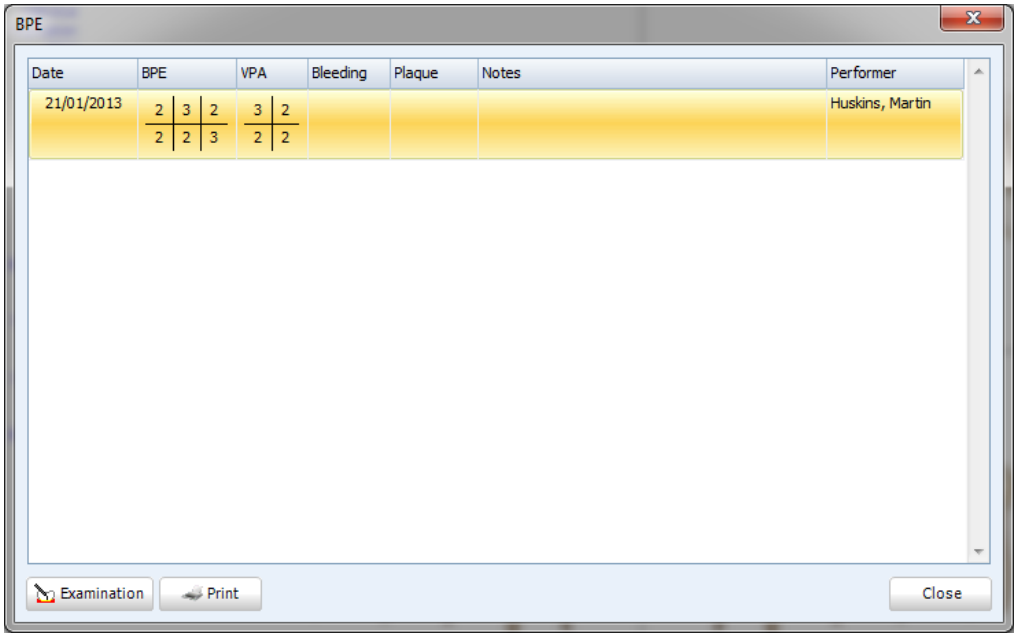
Options

On patient records, you can click the options button to reveal additional items such as BPE, Prescription and Implants.



BPE

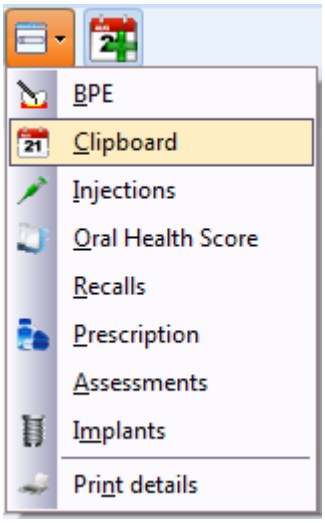
Select the **BPE** option. The following window appears.



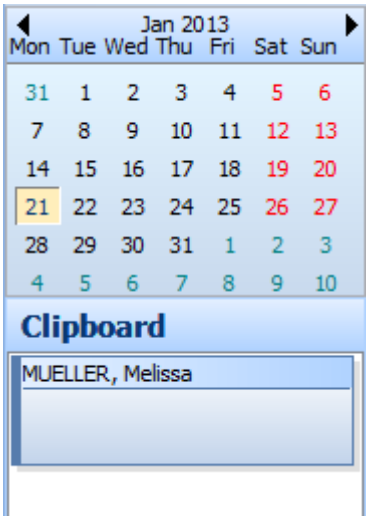
From this window you can view any historic BPE recordings. You can also create a new BPE examination by clicking on the **Examination** button in the bottom left of the window. To print all BPE examinations click on the **Print** button in the bottom left of the window.

Clipboard

Back to the options menu, you have the ability to add the patient directly to the clipboard from the options menu. To do this, select **Clipboard** from the menu.



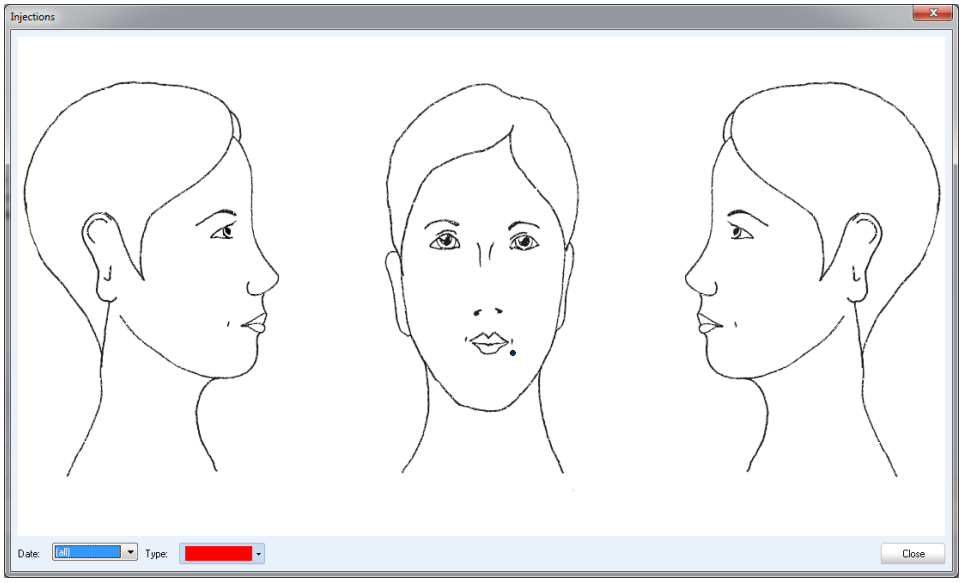
This will take you to the appointment screen. In the left hand column you can access the clipboard.



You can now drag this patient from the clipboard into a desired appointment slot.

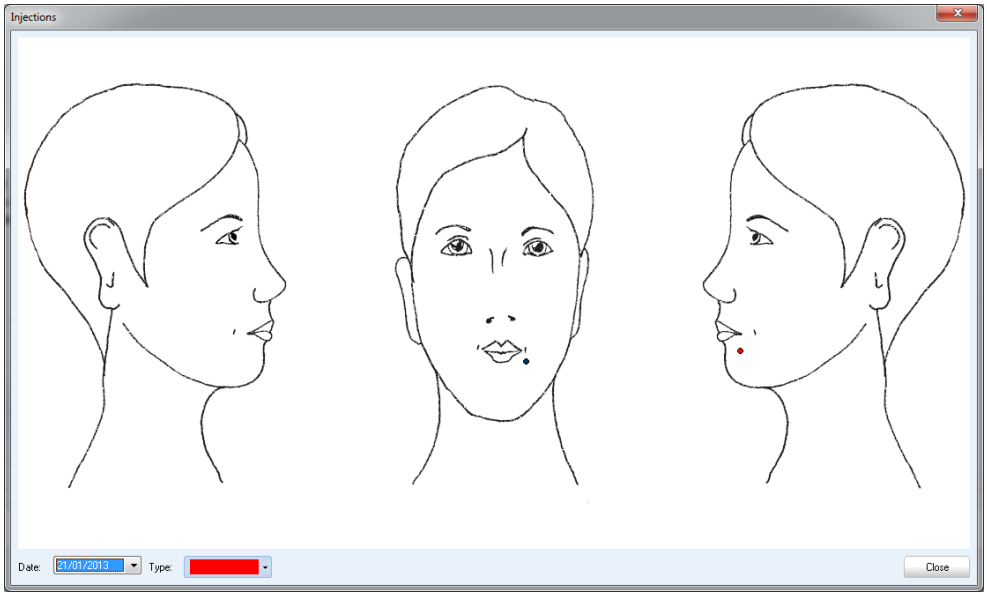
Injections

Once you have selected **Injections** from the dropdown menu you will be presented with the following window.



From this screen you can view any injections the patient has had on particular date. To add a new injection, select the type from the **Type** dropdown.

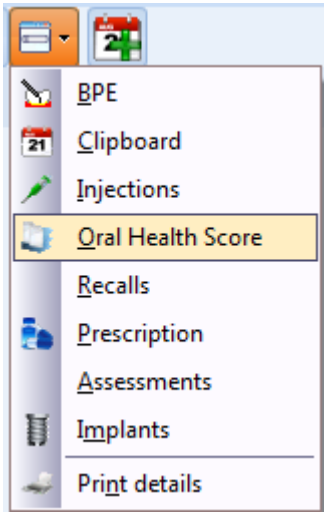
Once you have selected the type, click on the area of the diagram where the injection took place.



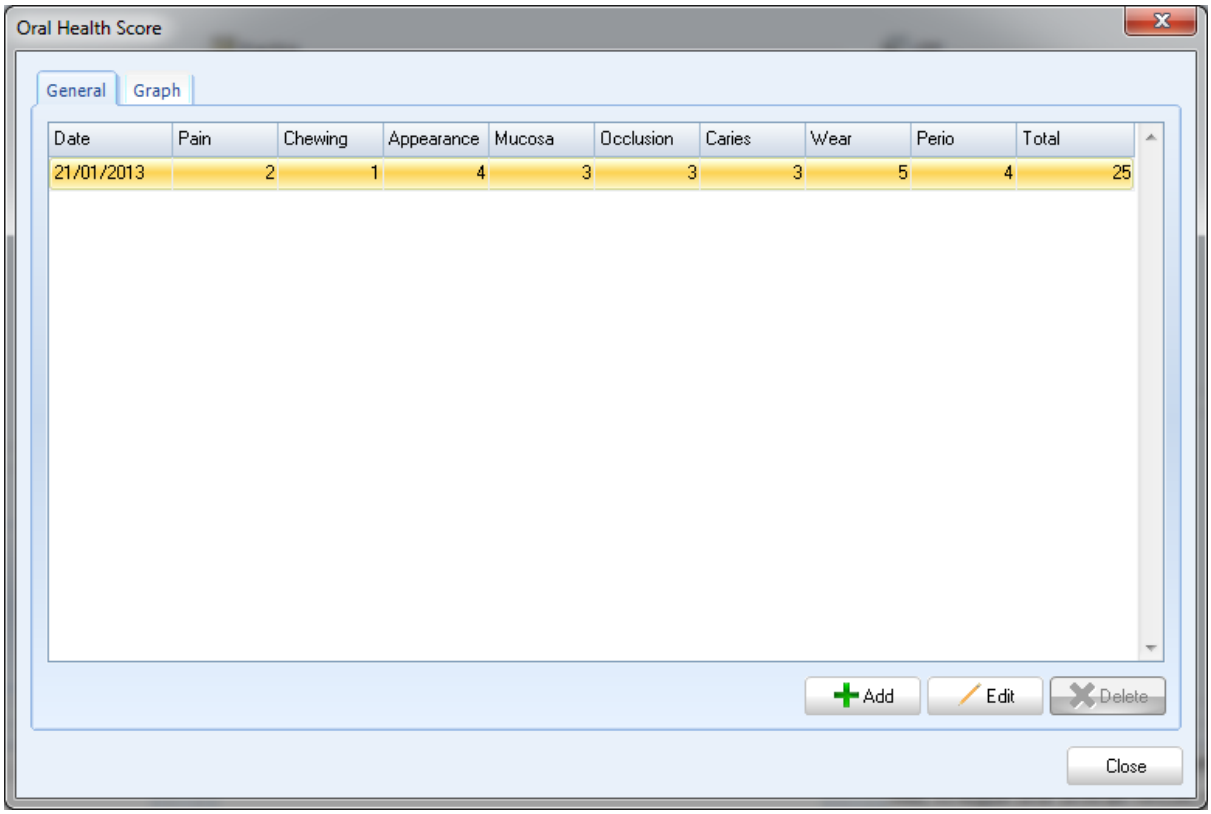
Click the **Close** button once you have added you injections to the diagram.

Oral Health Score

From the options menu you can access the oral heath score window.

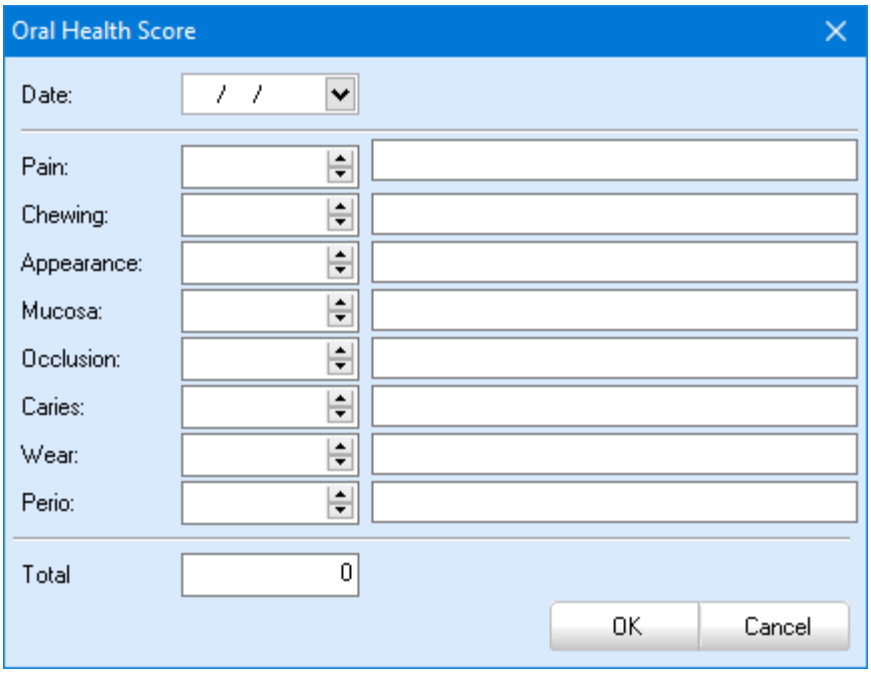


The **Oral Health Score** window is shown below.



From this window any previous oral health scores are shown. You have the ability to edit any of these by clicking on them then clicking on the **Edit** button located at the bottom right hand corner.

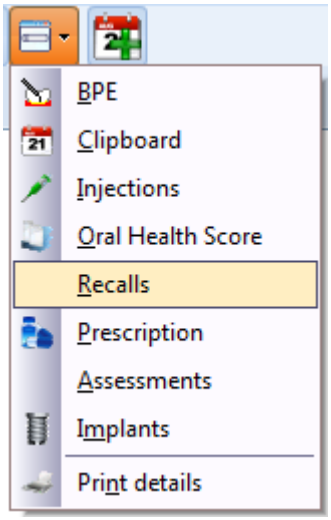
To add a new oral health score, click on the **Add** button in the bottom right hand corner of the screen. You will be presented with the following window.



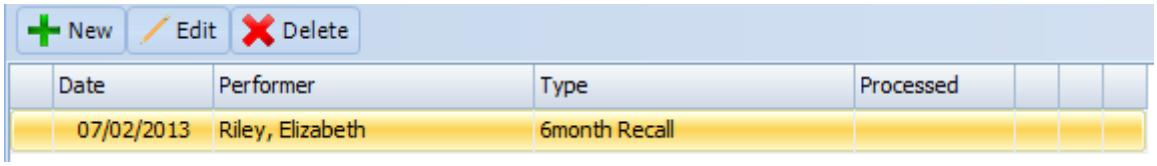
You can now add your figures to the appropriate areas. As you go a long this will update the total at the bottom of the window. Check the correct date is present at the top then click the **OK** button.

Recalls

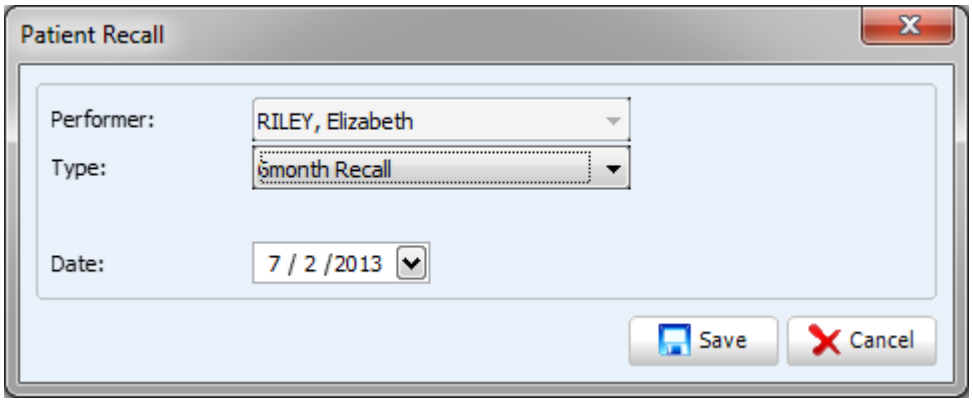
From the options dropdown list you have the ability to view any recalls that are set for the patient.



You will now be presented with the recalls screen.

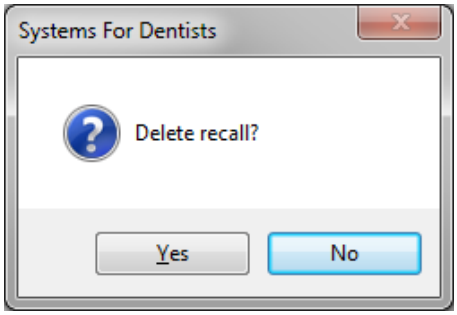


Any recalls will be displayed in this window. To edit an existing recall, click on the recall then click the **Edit** button at the top of the screen.



You can then change the type of the recall and edit the date of the recall if needs be. Click **Save** to confirm any changes.

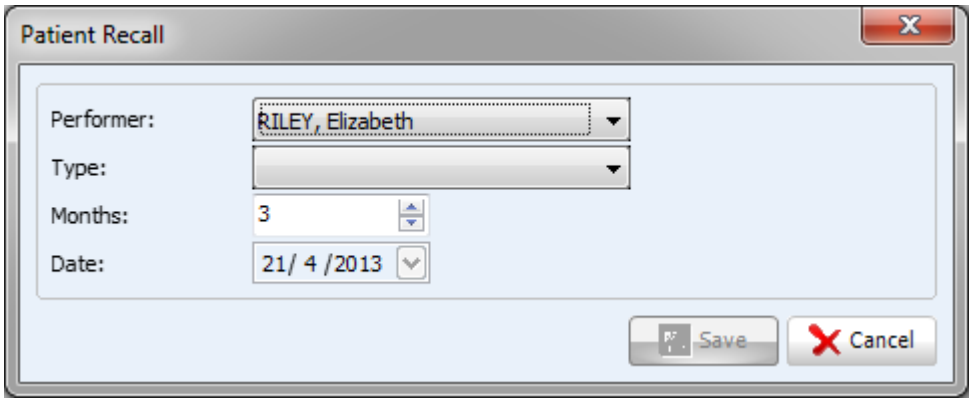
If a recall has been set that is now not required. Select the recall then click the delete button.



Click **Yes** to confirm the deletion.

To add a recall for a patient, click the **New** button at the top of the screen.

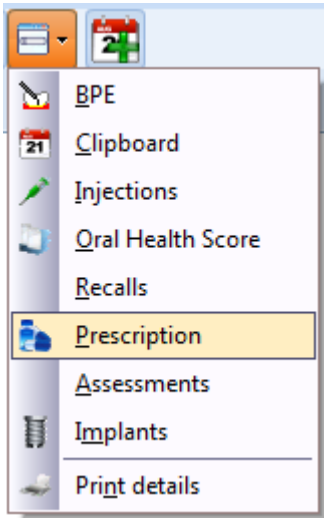
You will be presented with the following window.



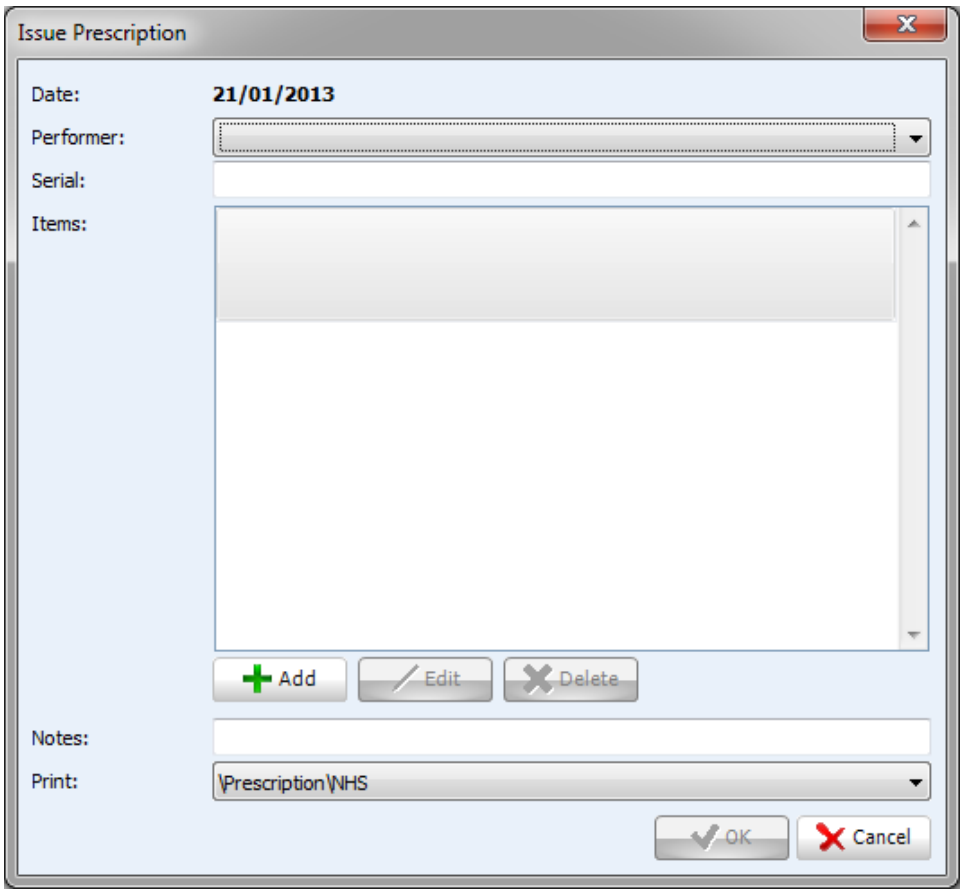
Select the performer, type and the amount of months. Click the **Save** button to confirm the new recall.

Prescription

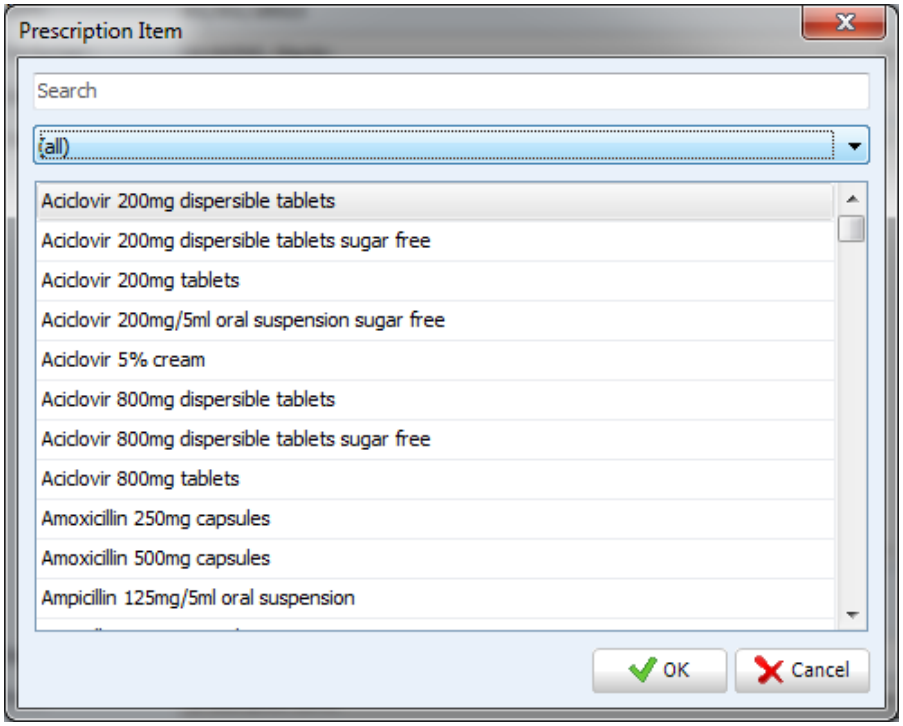
Prescriptions are another feature that can be accessed from the options menu.



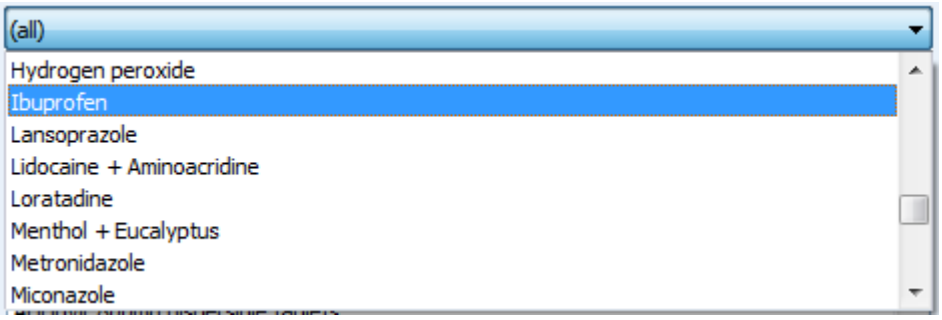
After selecting **Prescription** from the menu you will be presented with the following window.



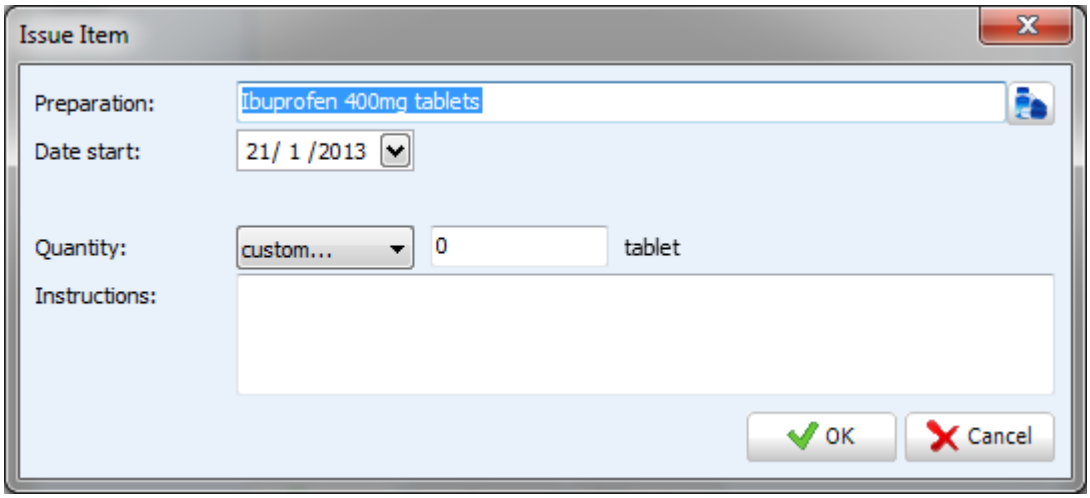
The first thing to do from the issue prescription window is to select the performer. Any existing prescriptions will be present next to items. To add a new item to the prescription screen, click the **Add** button towards the bottom left hand corner of the window. The following screen will then appear.



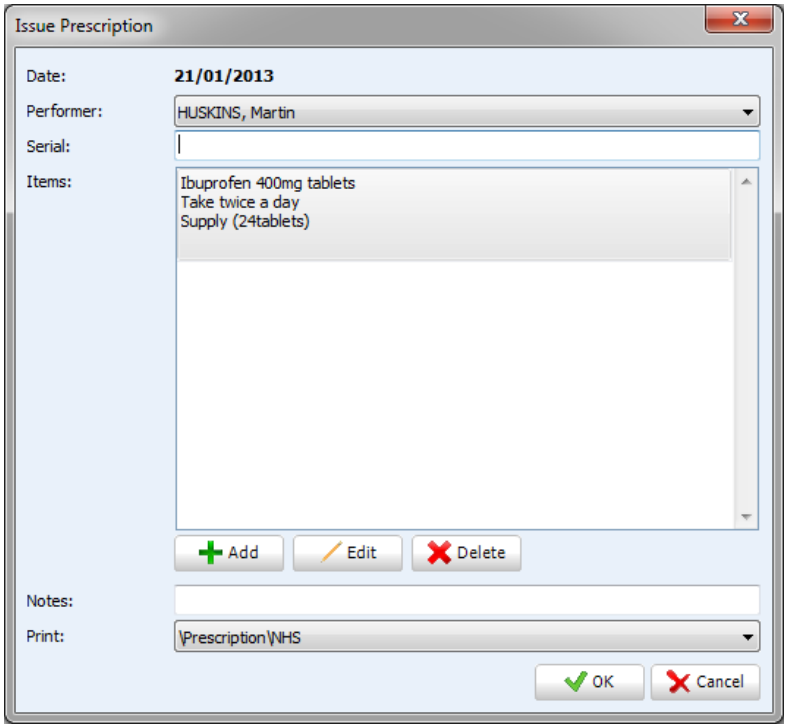
From this window you can search for a particular item using the search bar or you can use the dropdown to search for a particular category.



Select your item from the list by left clicking on the item, then click **OK**. The following window appears.



Enter the start date, and then choose your quantity. Add any instructions into the instruction box, and then click **OK**.

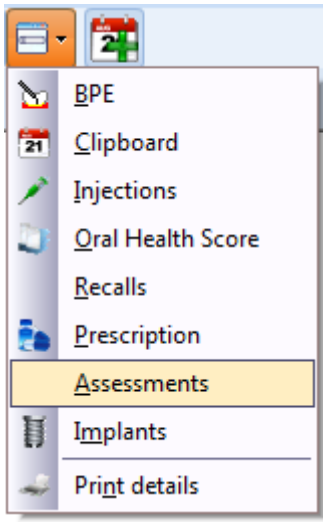


It will now appear in the item list in the initial **Issue Prescription** window.

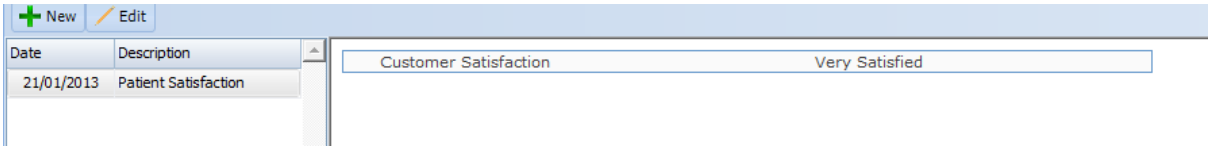
You can add any notes into the notes field. You can also select a prescription template to print. Click **OK** to confirm.

Assessment

If you have any patient assessments set up within your system, you can access these here.



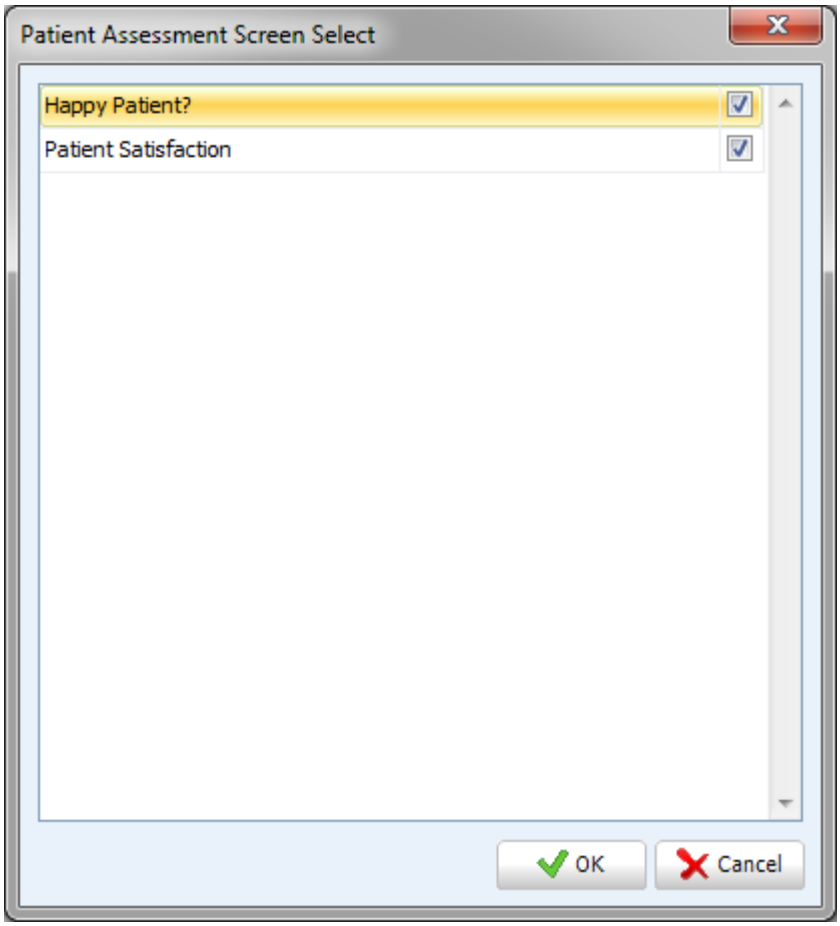
You will be presented with the following window after selecting **Assessments** from the options menu.



From this screen you will see any historic assessments that have been completed. By clicking on the assessment in the left hand column it will display the answers in the main screen.

You can also edit an assessment by clicking on the assessment in the grid on the left hand side of the screen, and then clicking the **Edit** button. The initial assessment will re-open so you can make any alterations that are necessary.

To create a new assessment, click the **New** button in the top left hand corner.



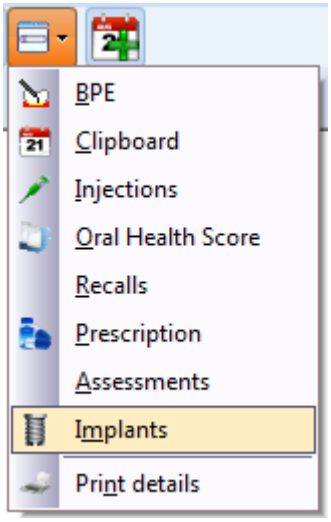
Choose the assessment that you want to create, and then click **OK**.

To see how to create patient assessment screens refer to the Assessment Setup chapter of the manual.

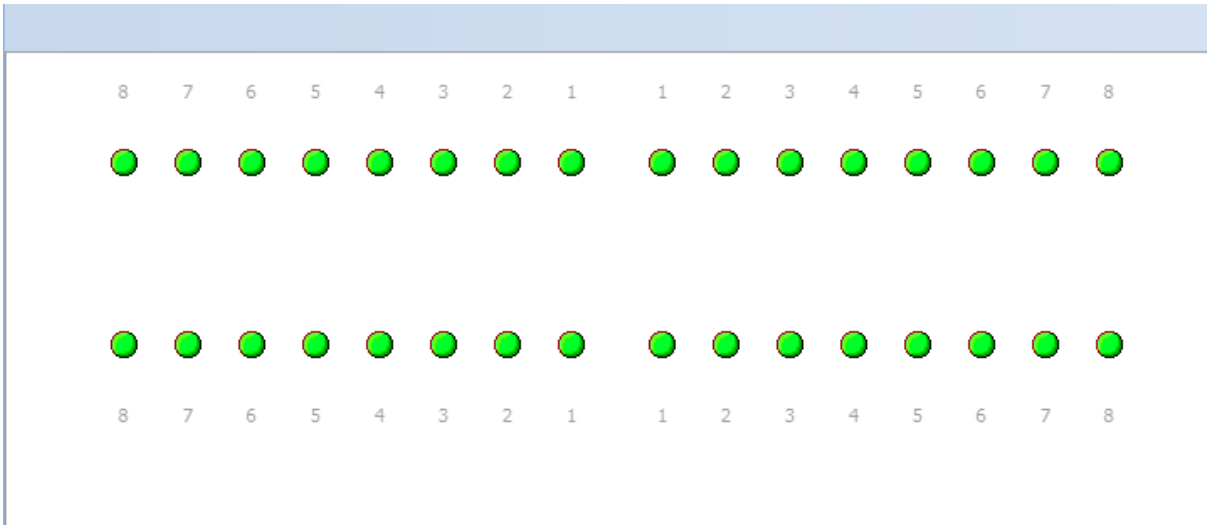
You can then enter the values to your assessment (example below). Click **Save** once you have finished entering your values.

Implants

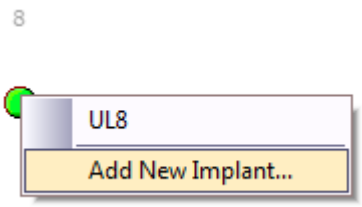
To add an implant to a patient's record, choose **Implants** from the options menu.



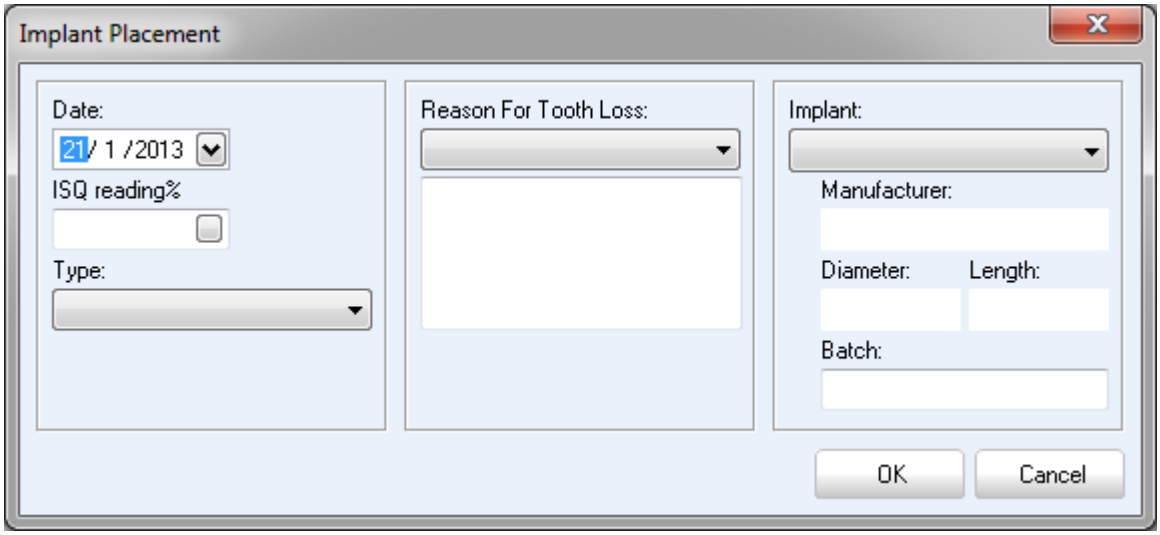
The main **Implants** screen is shown below.



To add a new implant, select the appropriate tooth from the chart by left clicking on the green dot associated with that tooth. You will be presented with the following options.



Click on **Add New Implant**. The following window appears.

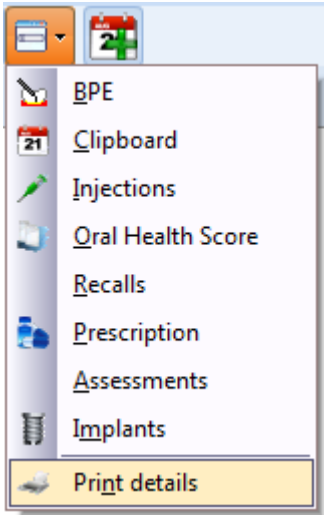


Add the necessary information into this window, click **OK** to confirm.

Note: You will have to setup your selection of implants in the Implant Setup section of the program. Refer to the setup chapter of the manual to learn how to do this.

Print Details

The final option accessible from the options menu is **Print Details**.



This option prints out everything that is present within the patient record.

Add patient to appointment clipboard

The final icon in the top bar of the patient's record is **Add patient to appointment clipboard**.

By clicking this icon you will be taken the appointment screen. You will find the appointment clipboard in the left hand column of the appointment screen (icon shown below).

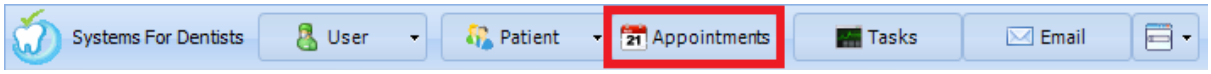
You can now drag the patient from the clipboard to the desired time slot.

Appointment Book

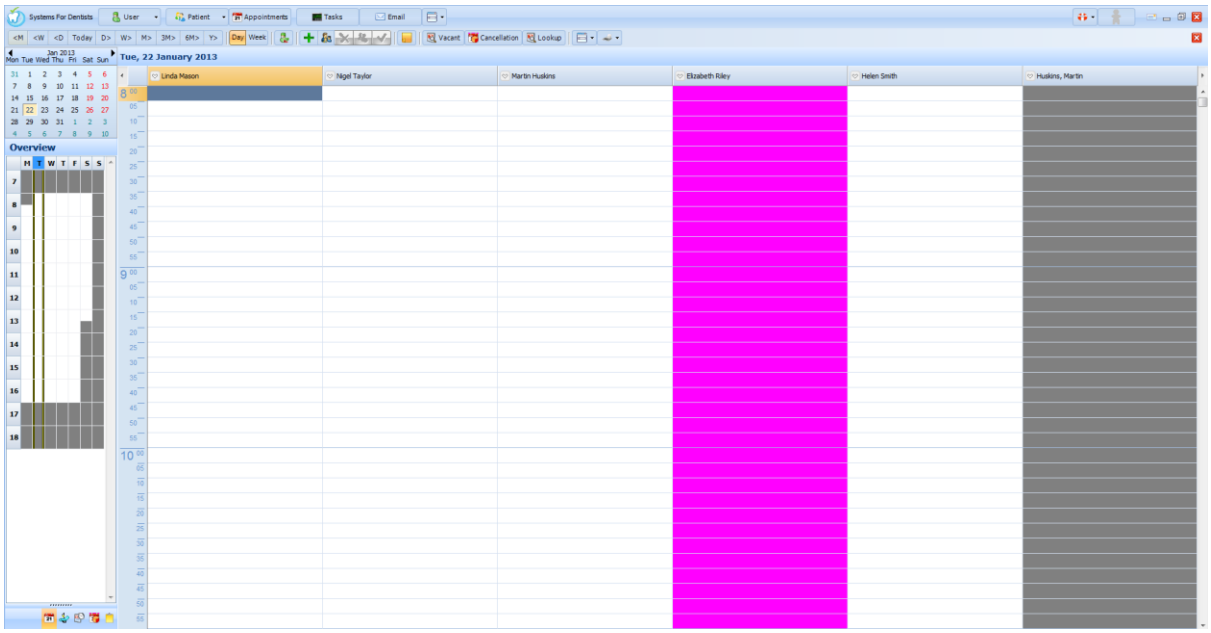
On a busy reception it is vital to be as efficient as possible within the appointment book. This chapter will tell you everything you need to know about the appointment book, including any tips that will save you time.

Icon explanations

To enter the appointment screen, click the **Appointments** button at the top the screen.

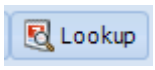


You are now presented with the appointment book.

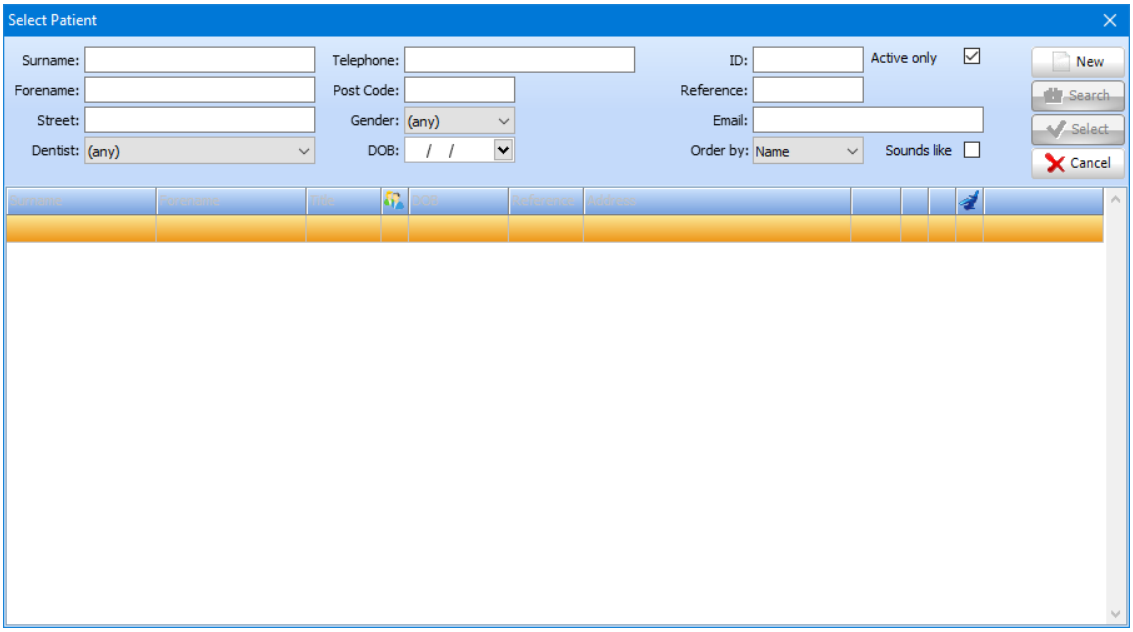


There are a number of icons at the top of the screen you should become familiar with.

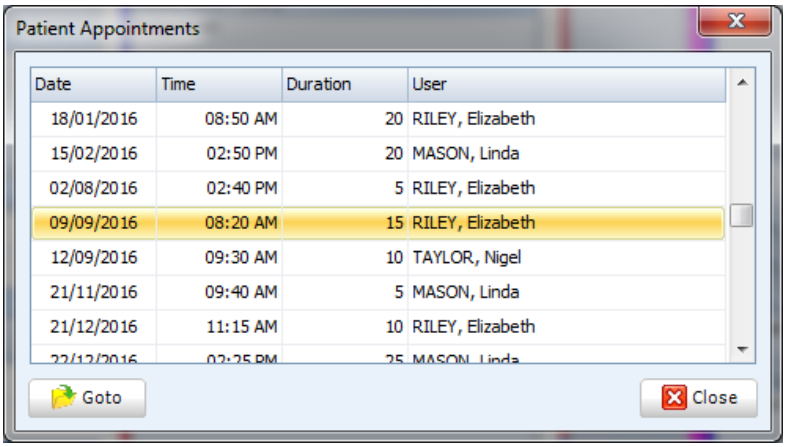
Lookup



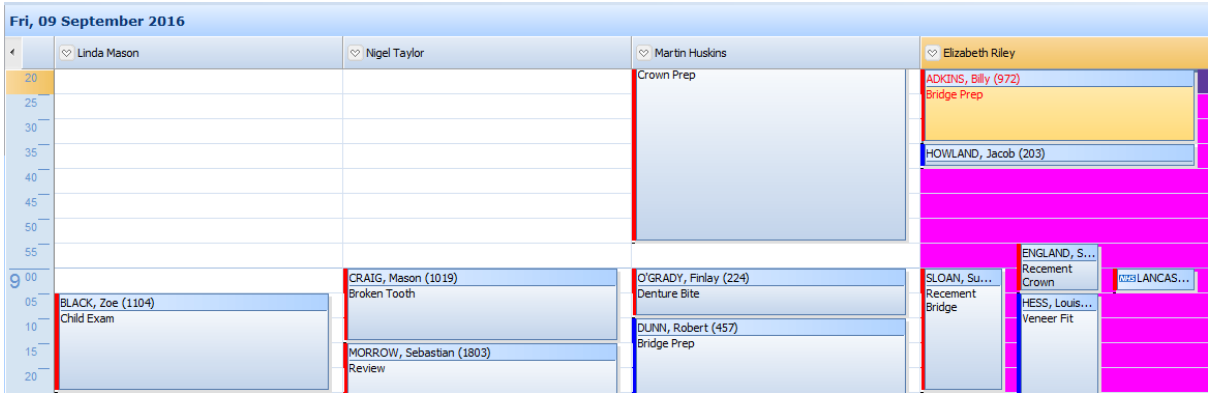
This button allows you to search for a patient and see any appointments that they have. Once you click the **Lookup** button the **Patient Search** window appears.



Search for the desired patient and then click **Select** when you have found your desired patient. The following window appears.

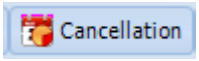


You can select any appointment and then click the **Go to** button and this will take you to the appointment within the appointment book (example below).



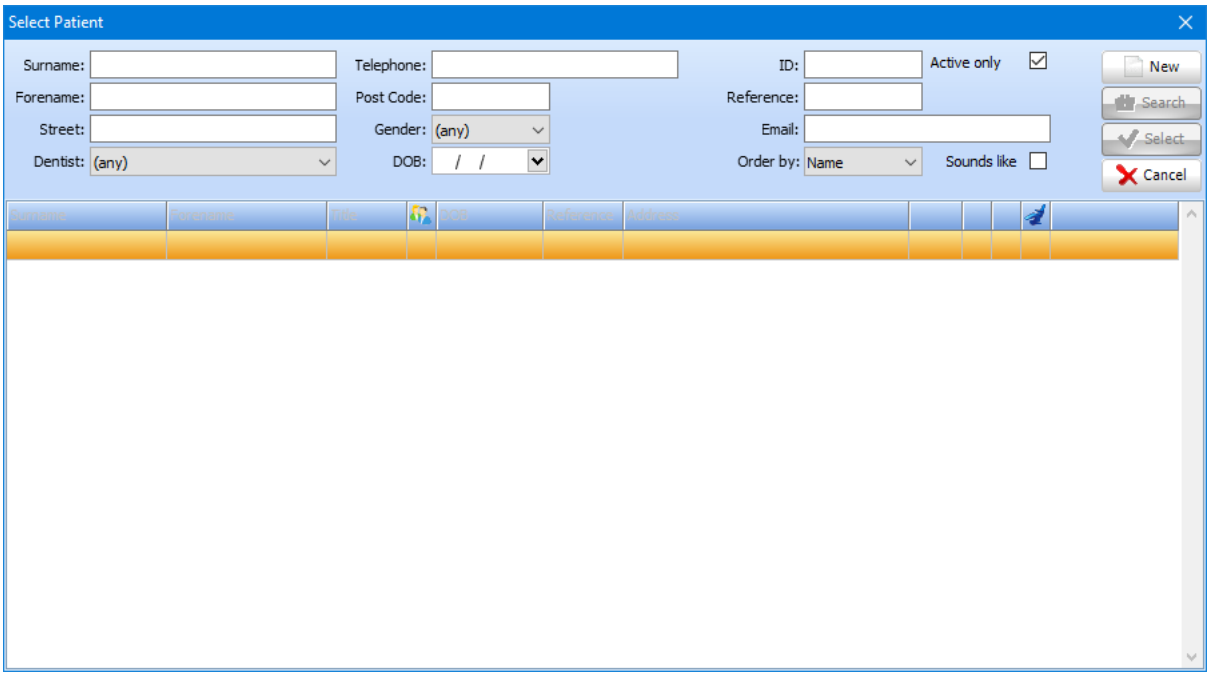
The time, performer and appointment are highlighted in yellow to make it easy to pick out the appointment.

Cancellation

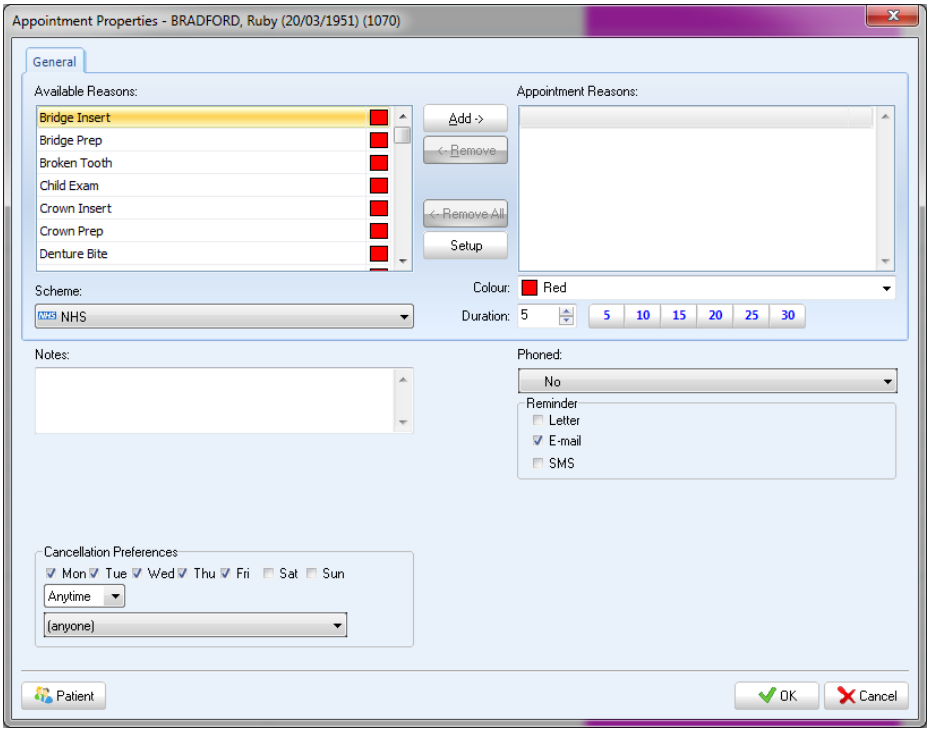


This is a useful feature for patients that desire an earlier appointment but there is no free space in the appointment book. Therefore they are then held in the cancellation list so when there is a cancellation that meets their preferences they can be dragged into the vacant appointment.

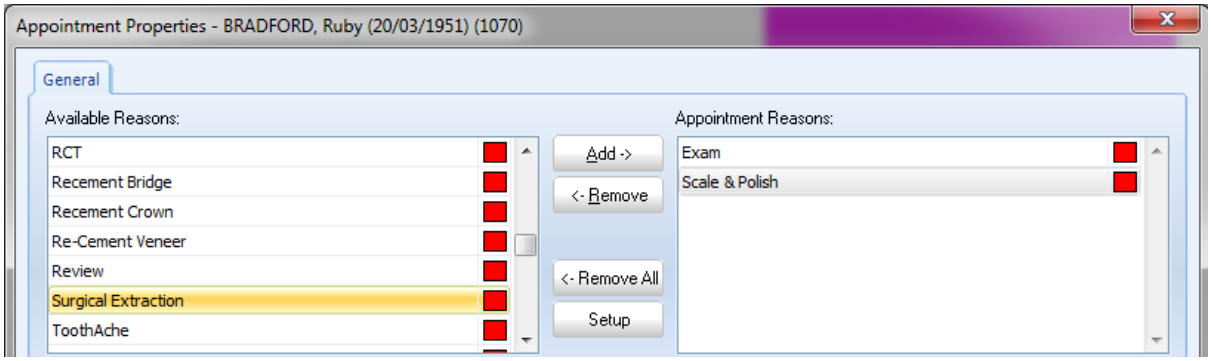
Once clicking the **Cancellation** button the **Patient Search** window appears.



Search for and then click **Select** to open the desired patient. The **Appointment Properties** window appears.



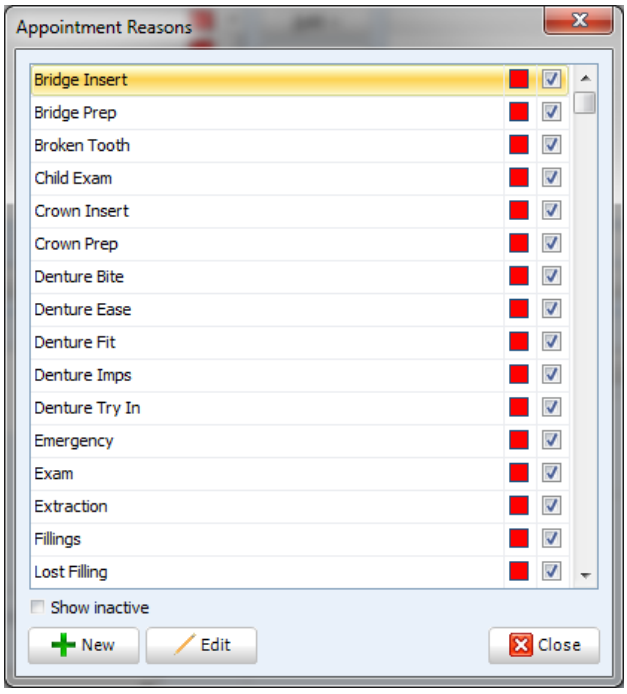
From this window you can select a number of options concerning the appointment. To add an appointment reason, select your reason(s) from the **Available Reasons** list then click **Add**. The reason will now be present in the **Appointment Reason** list (example below).



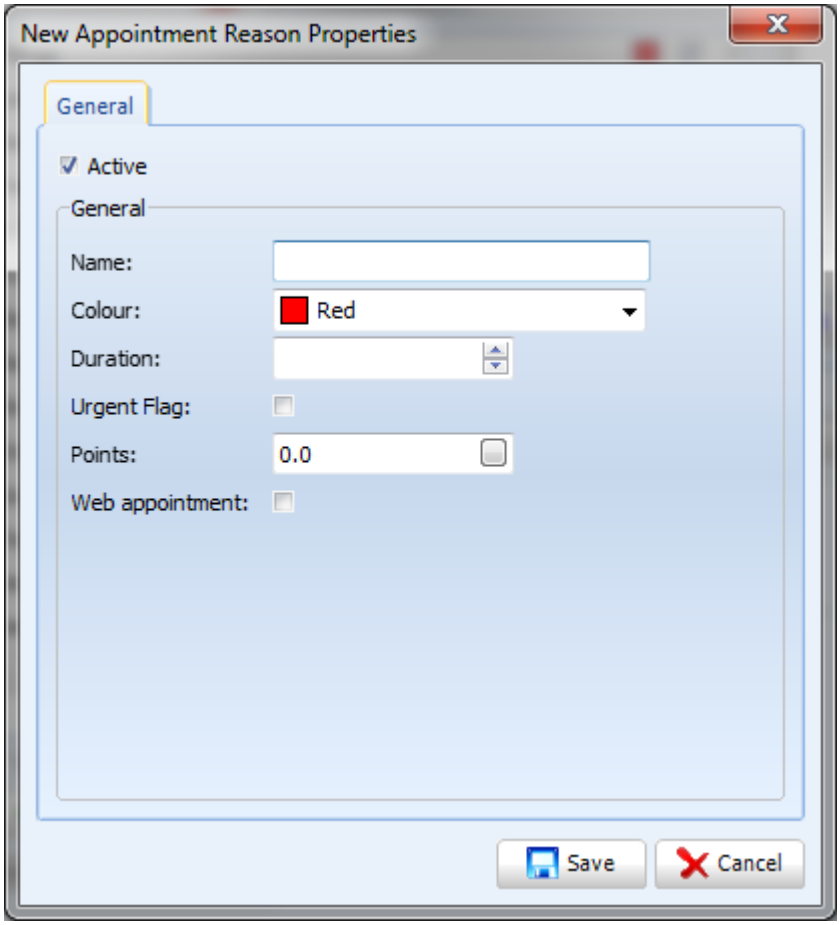
You can remove an appointment reason, by clicking on the reason the clicking on the **Remove** button. Or alternatively if you want to remove all of the appointment reasons, click the **Remove All** button.

You have the ability to create new appointment reasons from this window by clicking the **Setup** button.

The following window appears.

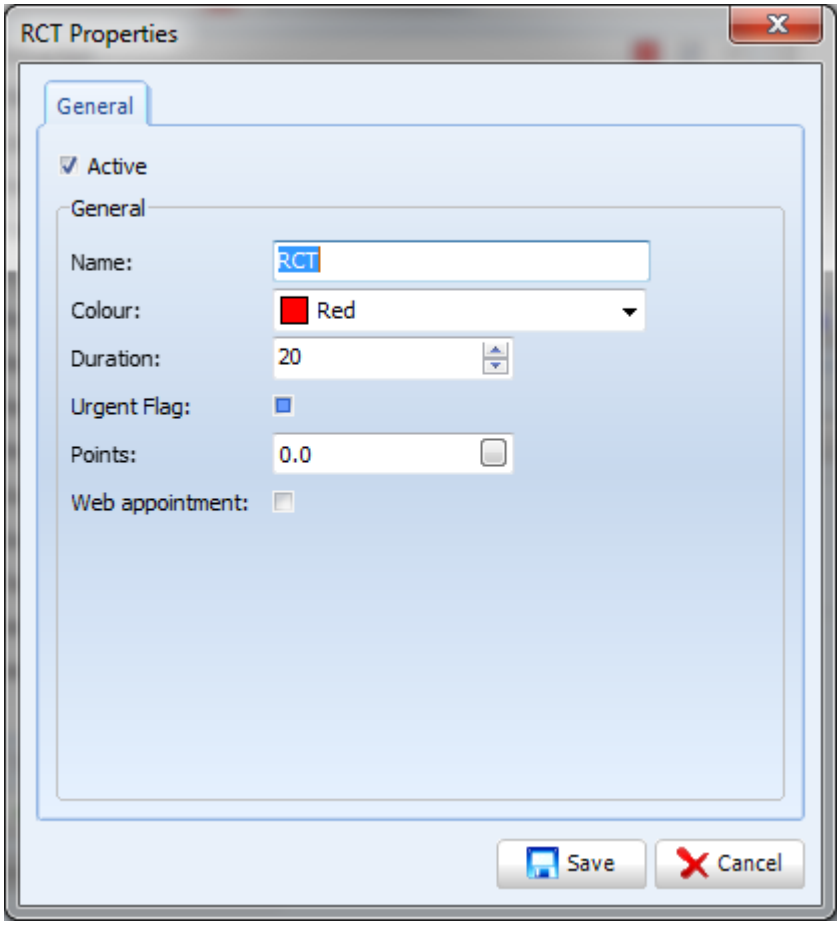


To add a new appointment reason, click **New** in the bottom left hand corner of the screen.



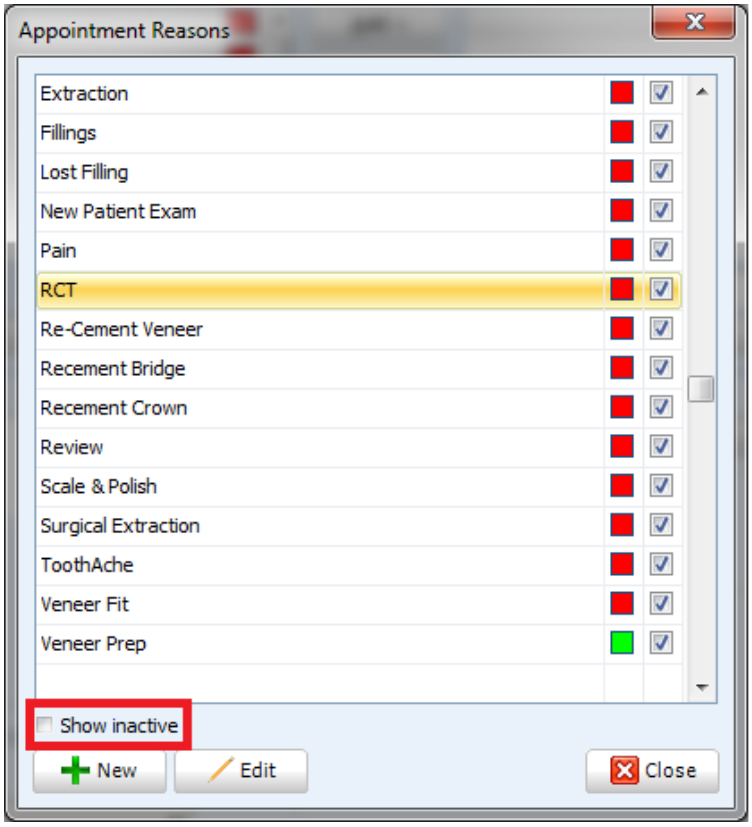
From this window shown above you can add the new appointment reason name, assign a colour and set a default duration (which can be changed at any time). You can also assign an urgent flag, points and web appointment. Click **Save** once you have entered all necessary information.

After clicking the **Save** button, you will be taken back to the Appointment Reasons screen. From this screen you can also edit any existing reasons by clicking the **Edit** button. Once you have clicked **Edit** you will be presented with the following screen.

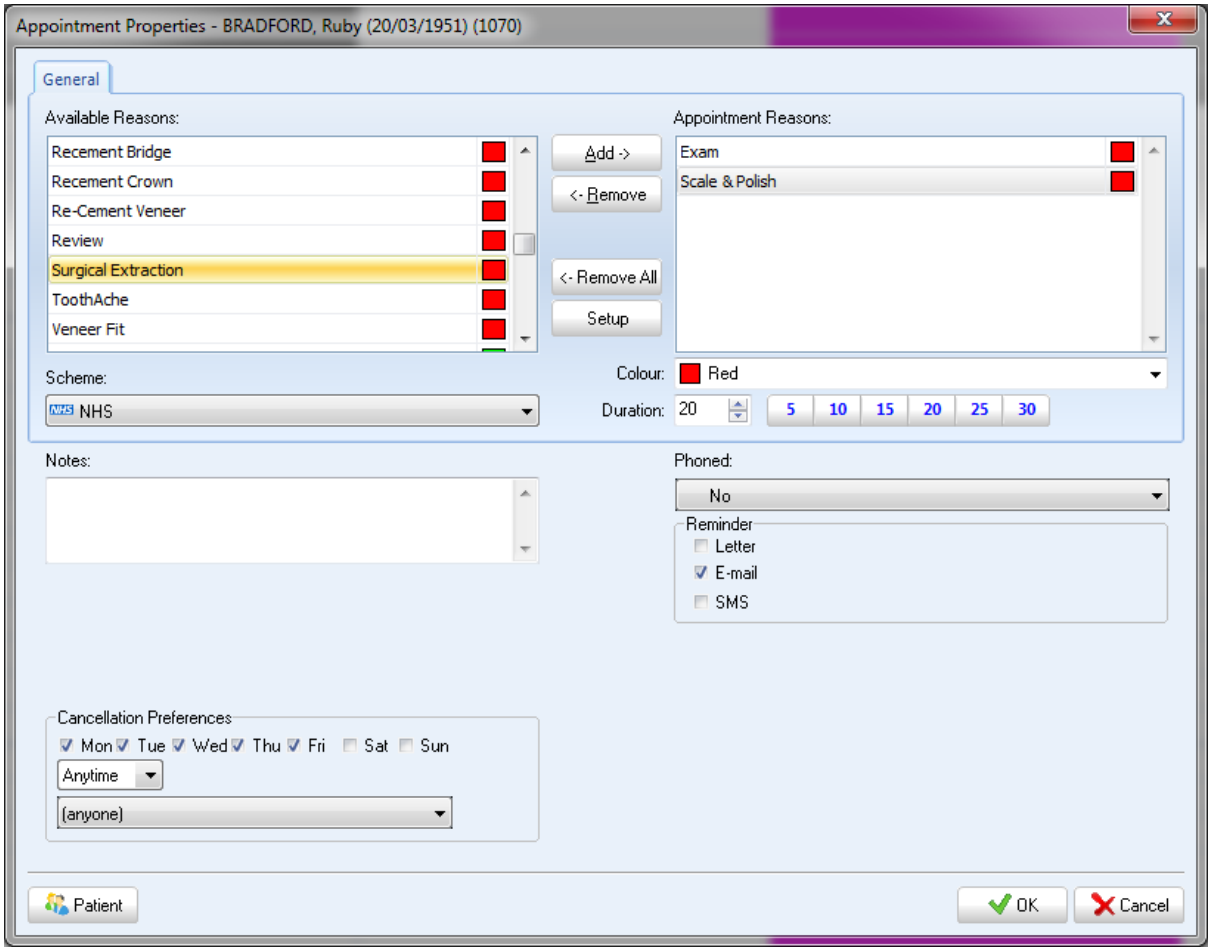


You can then make any changes to the appointment reason. For appointment reasons you no longer use you can mark them as inactive. Uncheck the **Active** checkbox to do so. Click **Save**.

This reason will then not be displayed when browsing for appointment reasons. If you wish to restore any appointments reasons that have been marked as inactive tick the **Show Inactive** checkbox at the button of the appointment reason window.

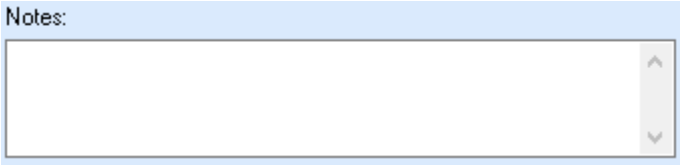


Click **Close** to go back to the **Appointment Properties** window.

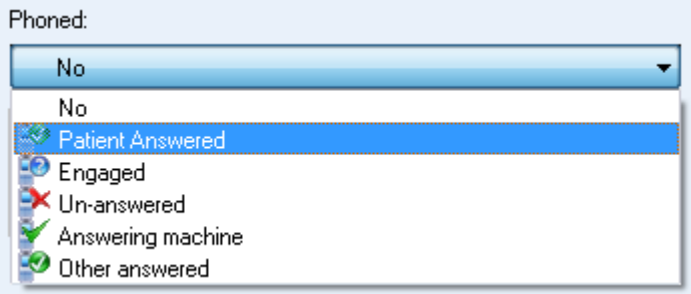


You can change the duration of the appointment by using the arrows, or by typing in the desired time in the **Duration** number edit. Alternatively you can use the predefined appointment duration buttons.

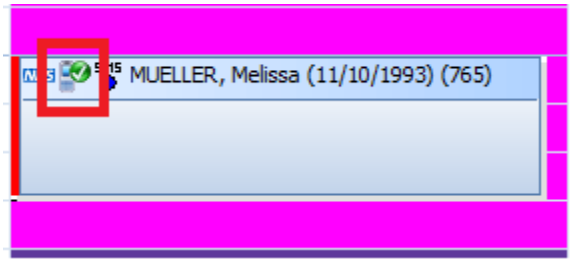
You can also add any notes you feel necessary into the **Notes** text box.



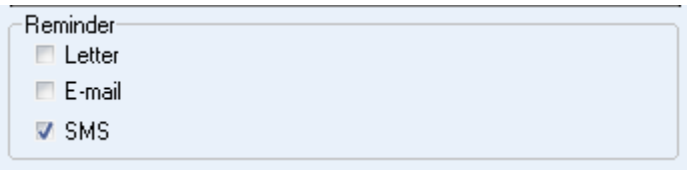
To the right of the **Notes** textbox you have the **Phoned** dropdown list. You can select from a number of options that are shown below.



You can come back into the appointment's properties screen at any time to change the status of Phoned. After making a selection you will see the appropriate icon on the appointment (example below).



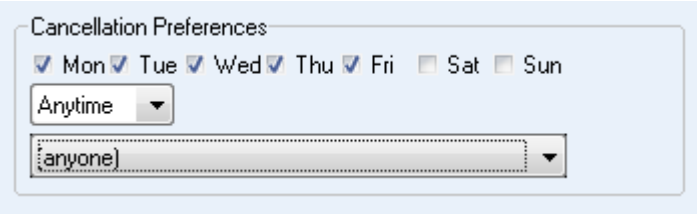
The next step is to select whether the patient would like to receive a reminder. These can be set by default in the **Program Setup** (refer to the setup section of the manual to see how to do this). To select a reminder tick the appropriate boxes.



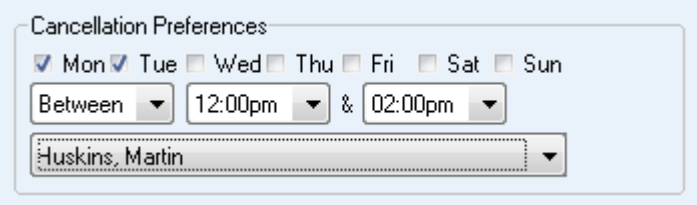
The E-mail and SMS reminders are automated. The email will be sent exactly a week prior to the appointment and SMS a day to two weeks prior depending on your setup. Refer to SMS Setup section of the manual to learn how to set up the timings of your SMS reminders.

This is another fantastic feature of our SMS service. To find out more, call Sales on 0845 643 2828 or alternatively email info@sfd.co.

The next section of the **Appointment Properties** window is to enter the cancellation preferences.



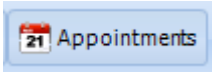
From this section of the appointment properties you can select preferred day(s), time and performer. In the example below the patient would prefer an appointment on a Monday or Tuesday between 12-2pm with the performer Martin Huskins.



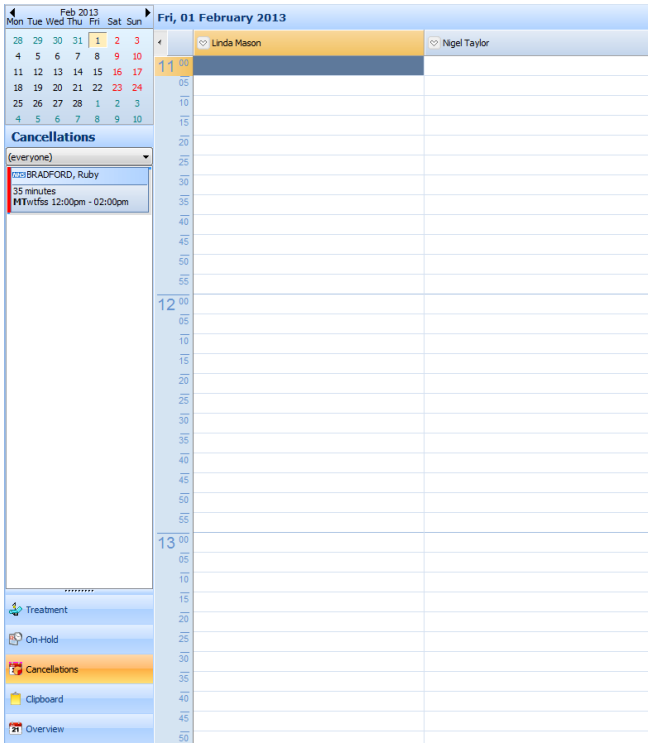
You can click the Patient button in the bottom left hand corner of the window if you wish to view the patient's record.

Once you are happy with your selection click **OK**, in the bottom right hand corner of the appointment properties window.

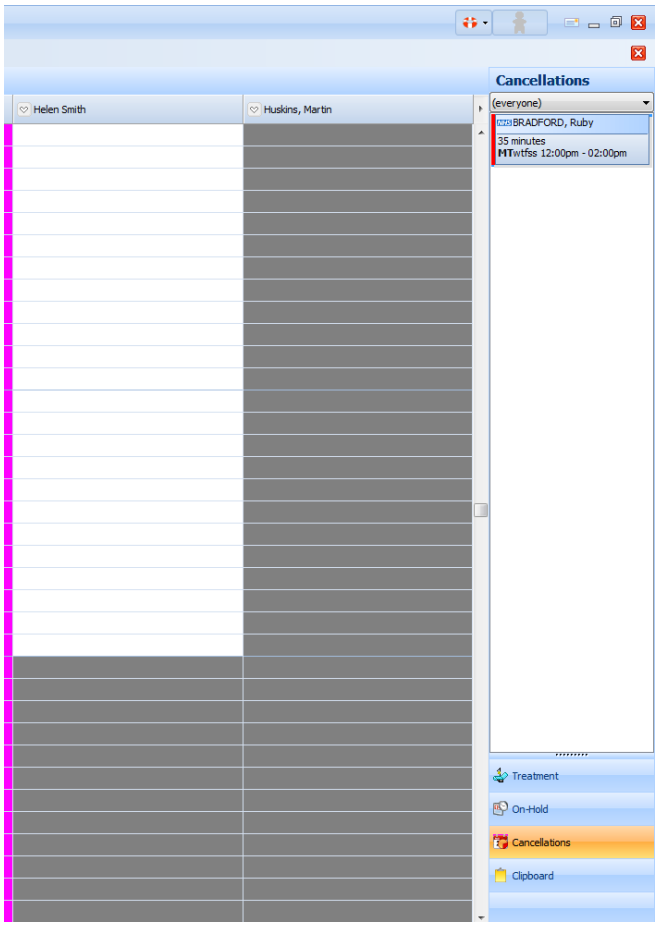
The appointment will now appear in the cancellation list on the main appointment screen. To navigate to the cancellation list, first of all click on the **Appointment** button at the top of the screen.



The cancellation will be displayed in different positions depending on what view you have your appointment book set. If you have the standard view it will be displayed down the left hand side of the page.

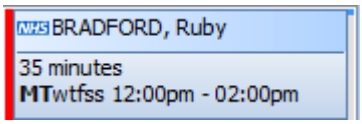


Alternatively if you have the split view set the cancellations list will be displayed on the right hand side. Split view is explained in more detail later on in this chapter.

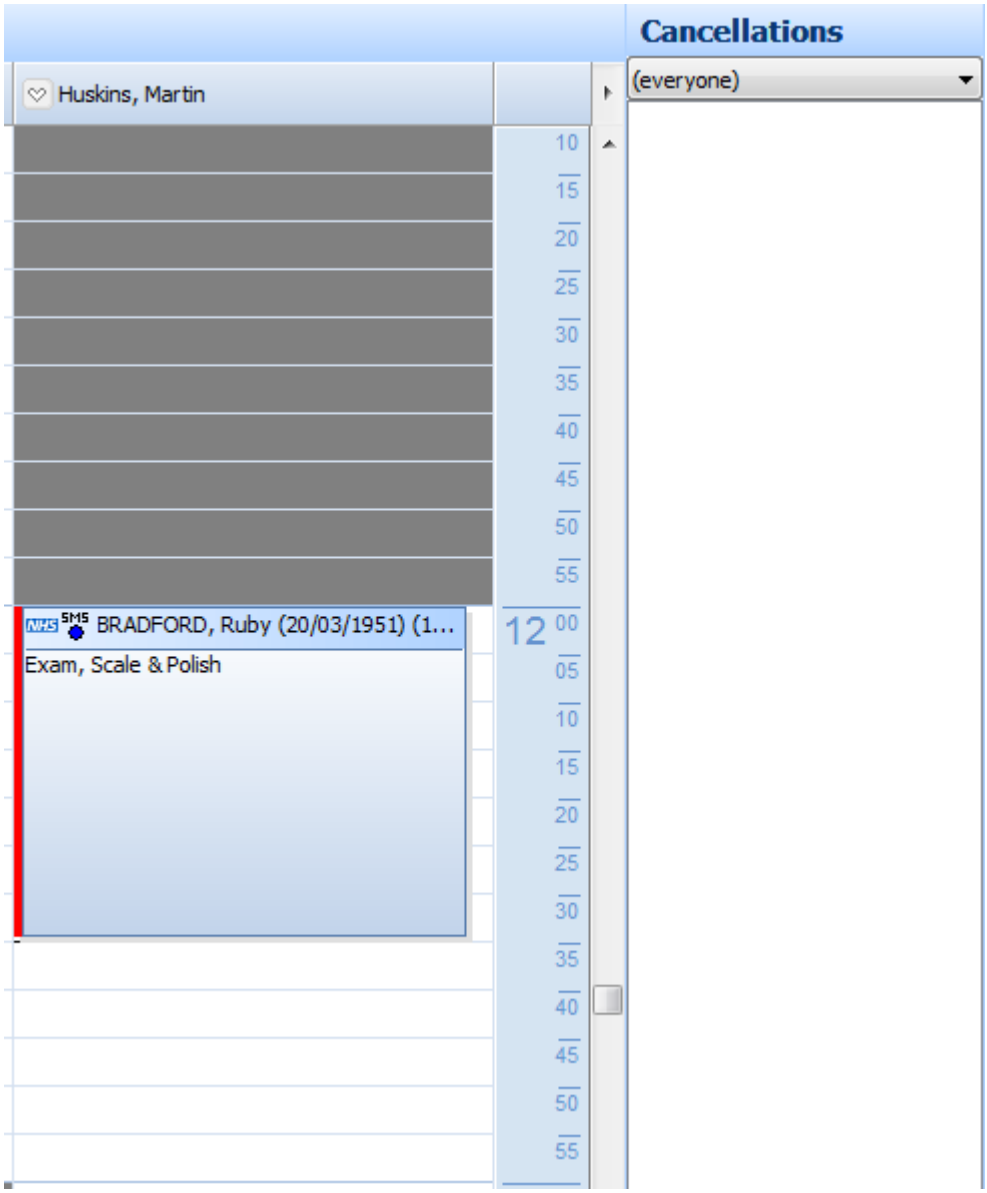


To access the cancellation list click **Cancellations** from the bottom of the pane which is situated on the far left of the screen in standard view and in the far right in split view.

From the cancellation list you are able to drag the appointment straight into a desired time slot. An example of what a cancellation appointment looks like is shown below.



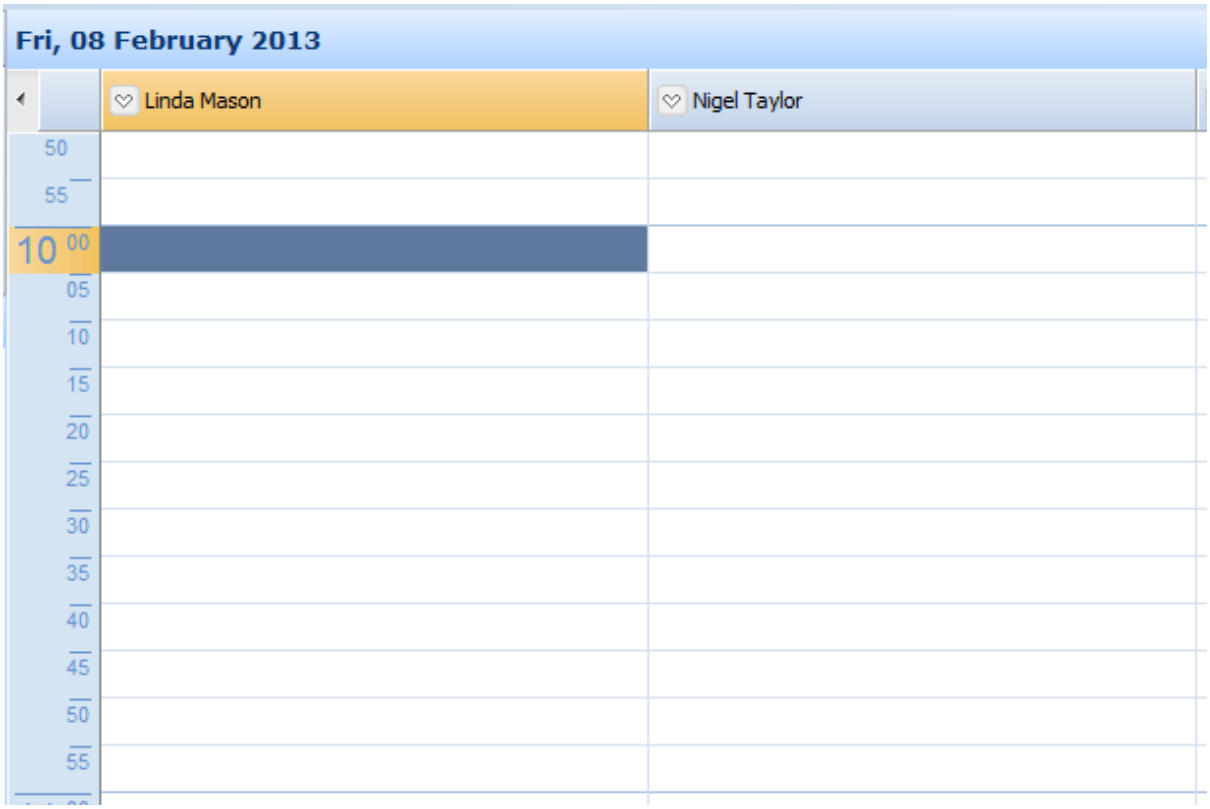
From the appointment you can see the patient would prefer an appointment on either a Monday or Tuesday between 12-2pm. When an appropriate time slot becomes available, drag the appointment from the cancellation list and drop into the available time slot.



Book

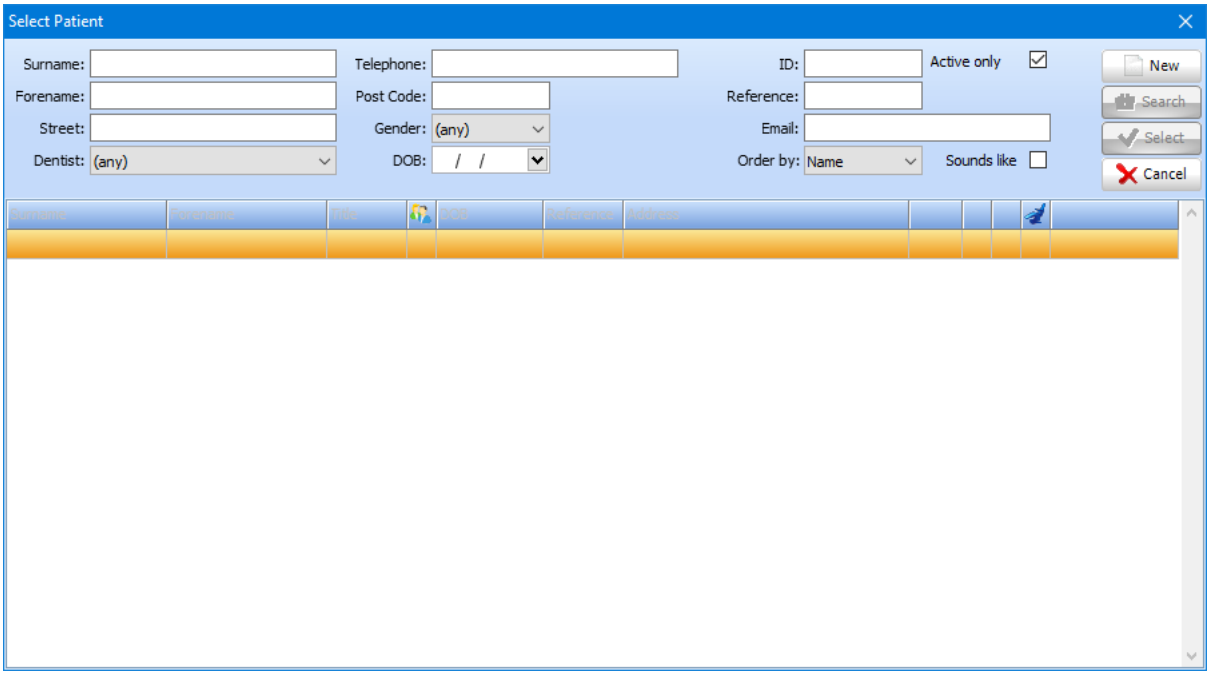
The **Book Appointment** button is something you will become very familiar with over time. It is situated near the top of the screen.

Select a time slot in the appointment book by left clicking on the desired time under the correct performer (example below).



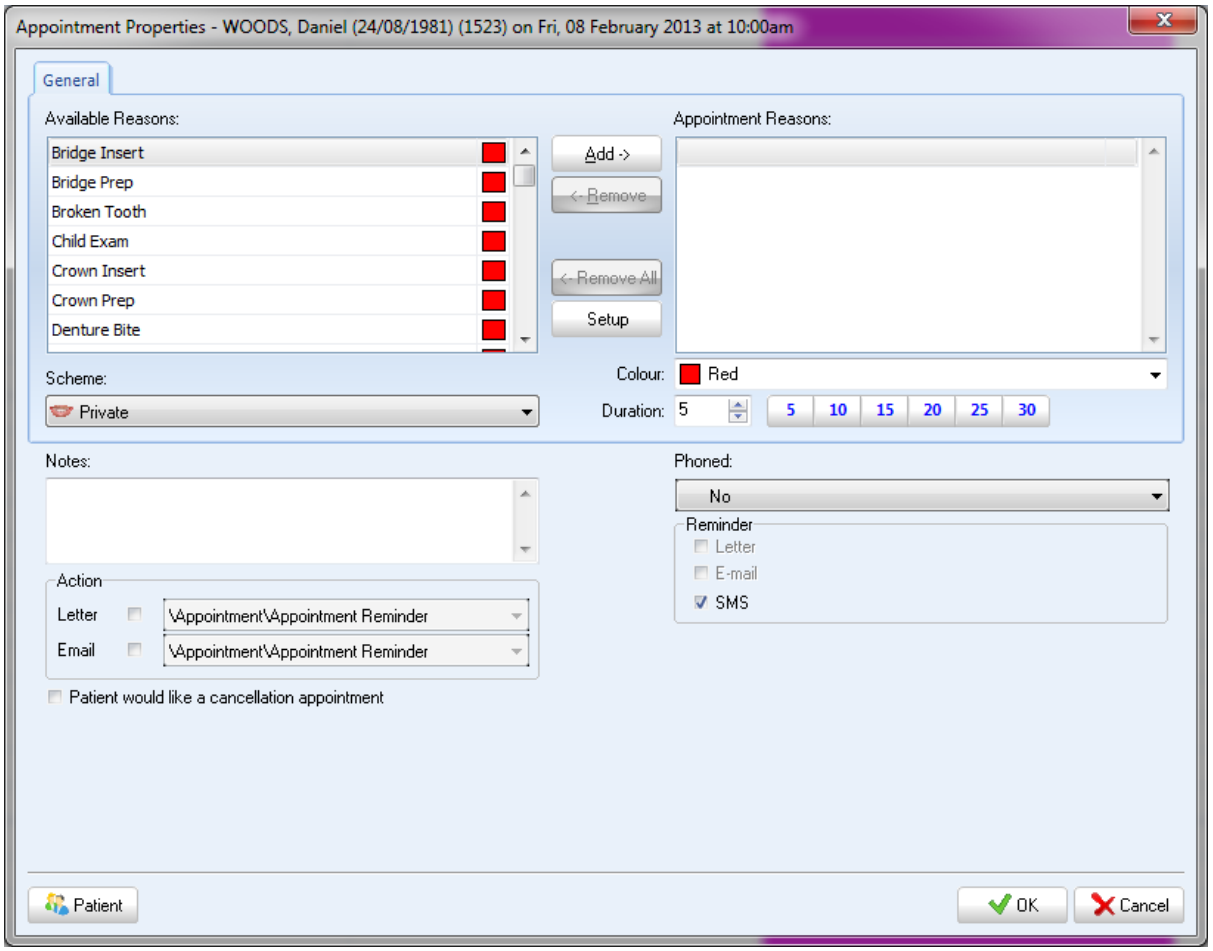
In the example above we have selected 10 o'clock with Linda Mason. Now that we have selected a time slot, click the **Book Appointment** button at the top of the screen.

Once you click the **Book Appointment** button you will be presented with the **Select Patient** window.



From this screen you can select the patient you wish to book an appointment for. To do this, double click on the patient or click once then click the **Select** button.

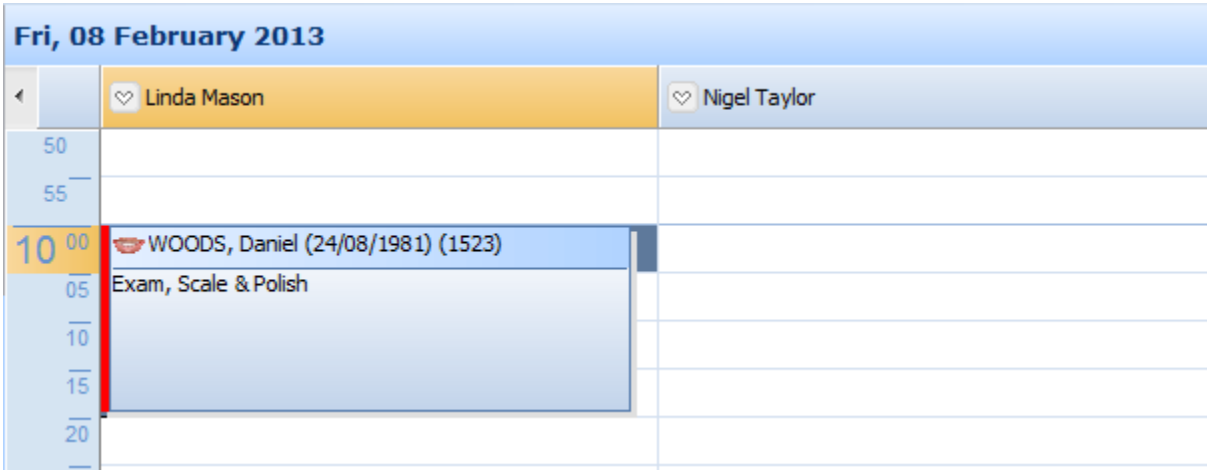
You will then be presented with the **Appointment Properties** window.



Fill in the **Appointment Properties** windows as appropriate.

Within the Action part of the appointment properties windows you have the ability to send a reminder letter or email to the patient as the soon as the appointment has been booked. Tick the option desired then use the dropdown to select the appropriate letter.

Once you have completed filling out the appointment properties window, click **OK** in the bottom right hand corner of the window. The appointment will now appear on the appointment book.



Book family appointment

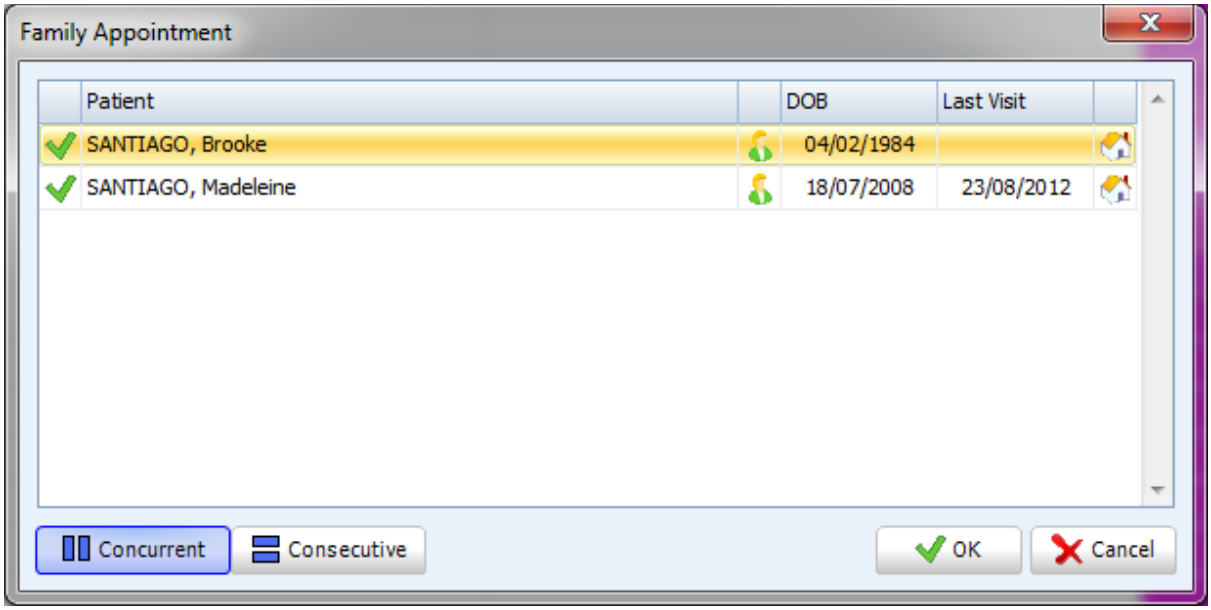
There will be times where you require to book family appointments. SFD v6 has a feature that makes this very easy. The **Book Family Appointment** icon is situated at the top of the screen.

Similar to booking a single appointment the first step is to select a date, time and performer. Click on the time slot in the appointment book.

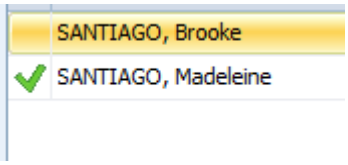
Now click on the **Book Family Appointment** button at the top of the screen.

You will then be presented with the patient search window. From here select a member from the family you wish to book an appointment for.

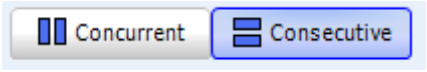
After selecting the patient you will now be displayed with the following screen.

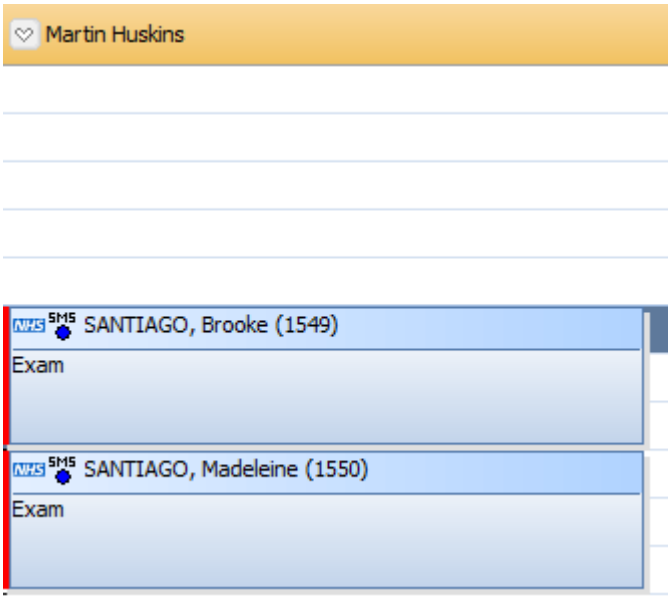


From this screen you can select the family members that require an appointment.

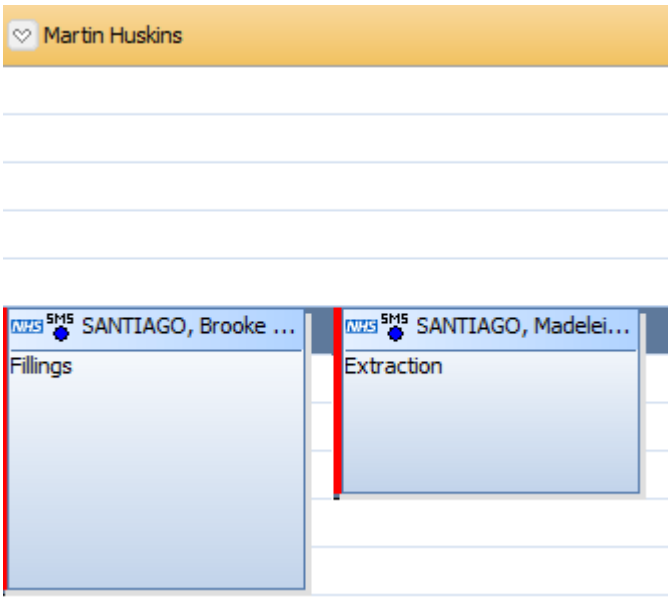


You can now select if the appointments are concurrent or consecutive.



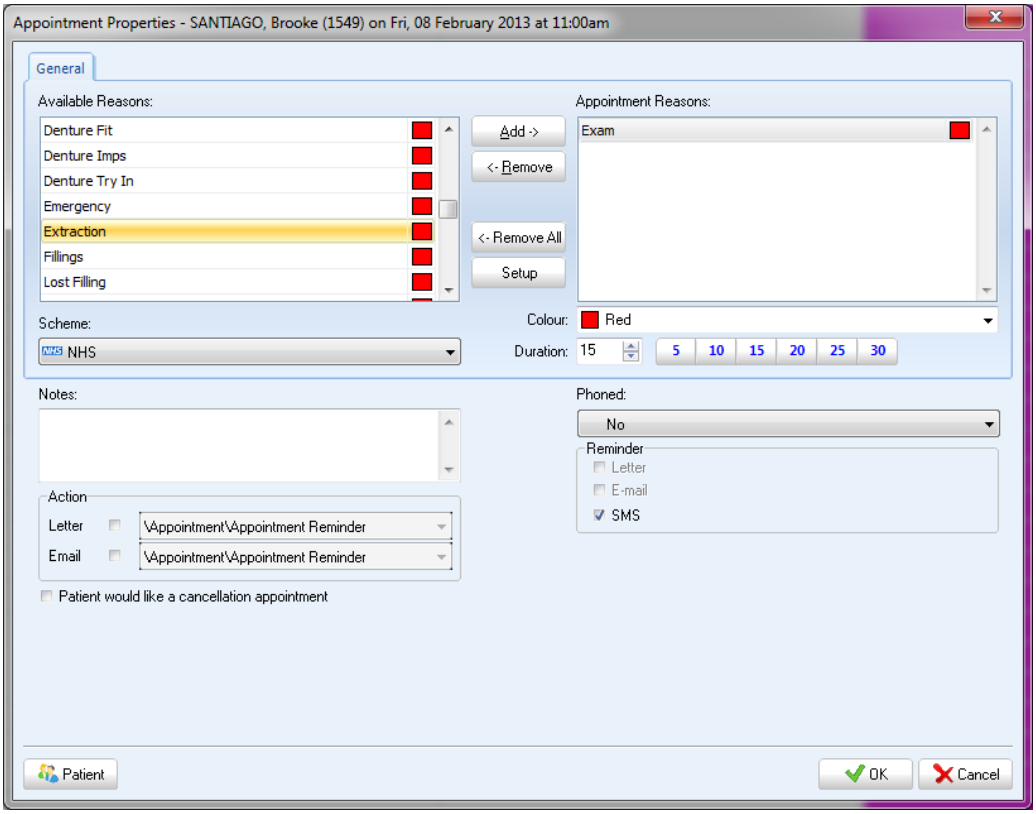


Alternatively if you selected concurrent appointments it would be displayed as shown below.



In the example above consecutive appointments have been selected.

Once you are happy with your selections, click **OK** at the bottom right hand corner. You will then be presented with the appointment properties window for the first member of the family.



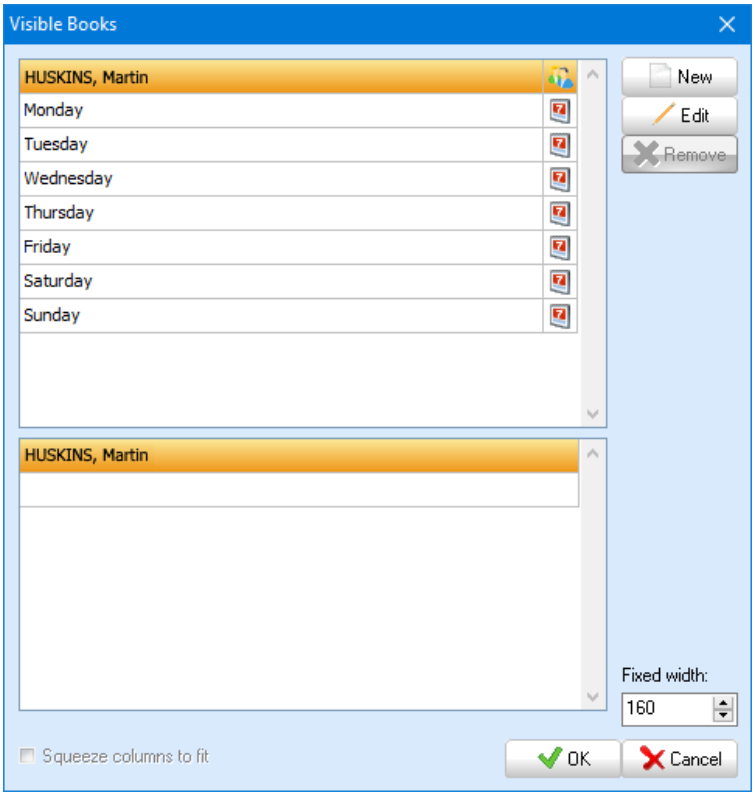
Once you have finished adding to this window, click **OK**. You will then be presented with the appointments properties window for the next member of the family. Fill this is then click **OK**. Repeat the process until you have completed the appointment properties screen for each family member that requires an appointment.

The appointments will now be shown in the appointment book.

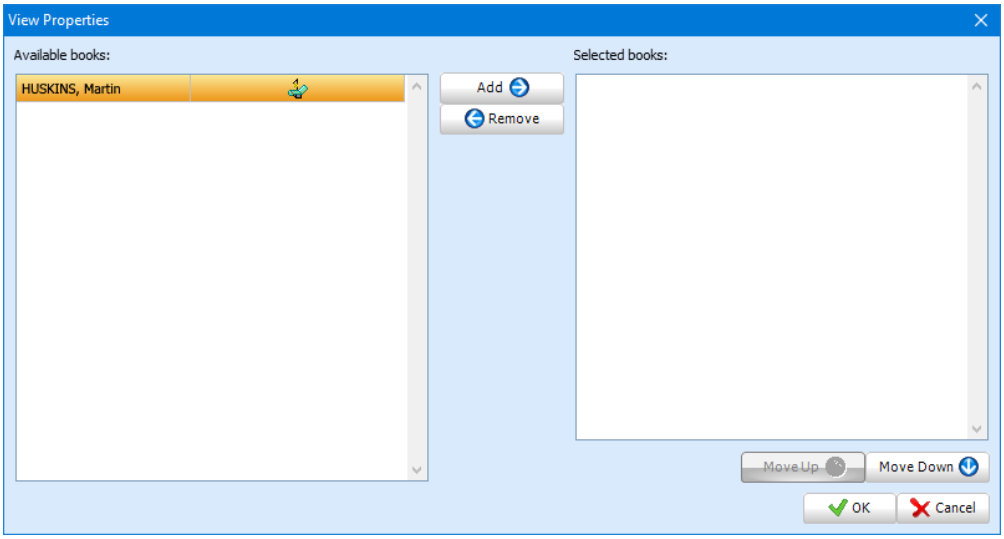
Change visible books

You may only wish to view certain books on particular days. To do this, click on the button shown below which is situated at the top of the main appointment screen.

After clicking on this icon you will be displayed with the following window.



From here you can change the performers you can see (fixed, regardless of the day of the week) or you can show certain performers on certain days. If you wish to change the performers you can see regardless of the current day, click your name at the top of the list then **Edit**. To change the performers visible to you based on the day, select the day then click **Edit**.



Performers on the left are hidden whereas ones on the right are visible and will be based on your criteria (Your permanent view or based on the day).

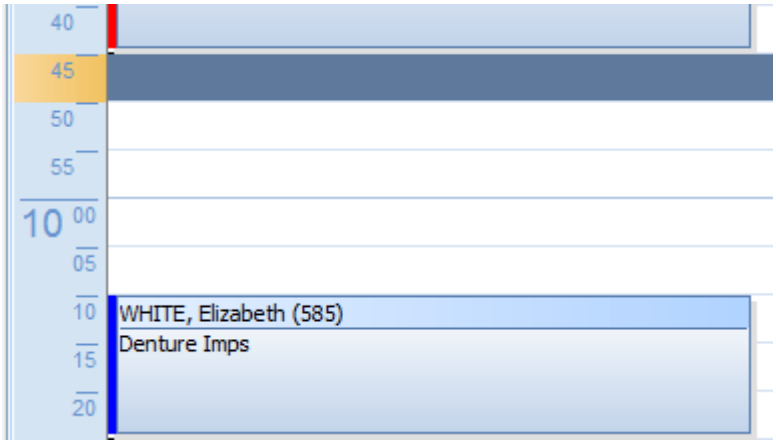
The changes you make here apply to your account only. If you login on another computer your settings will transfer.

Click **OK** to confirm.

Text Appointment

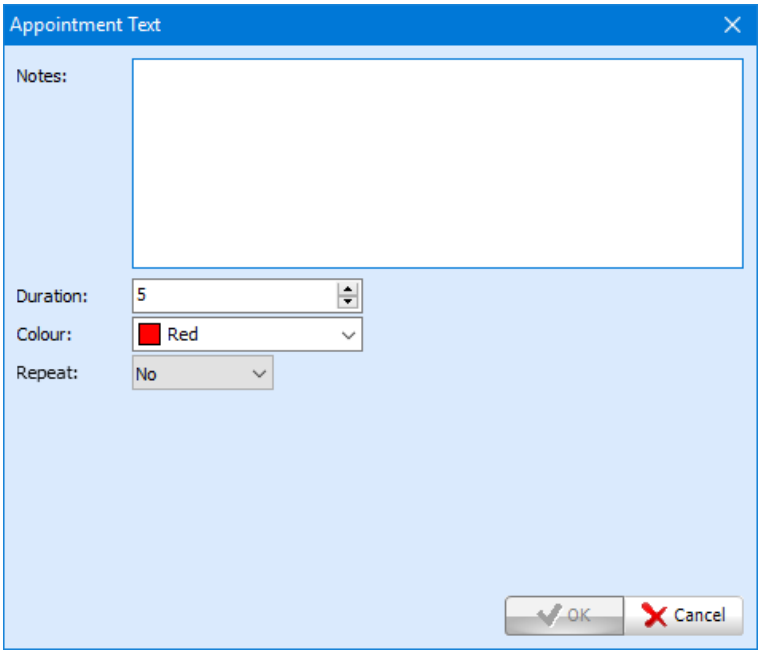
There may be times you wish to add text appointments to your diary. These are useful if you wish to block out a small section of your day for meetings etc. To do this, click on the button shown below.

First of all, select the time on the appointment book you wish to add the text appointment to (example below).



Now click the **Text Appointment** icon at the top of the screen.

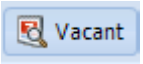
The following window will now be displayed.



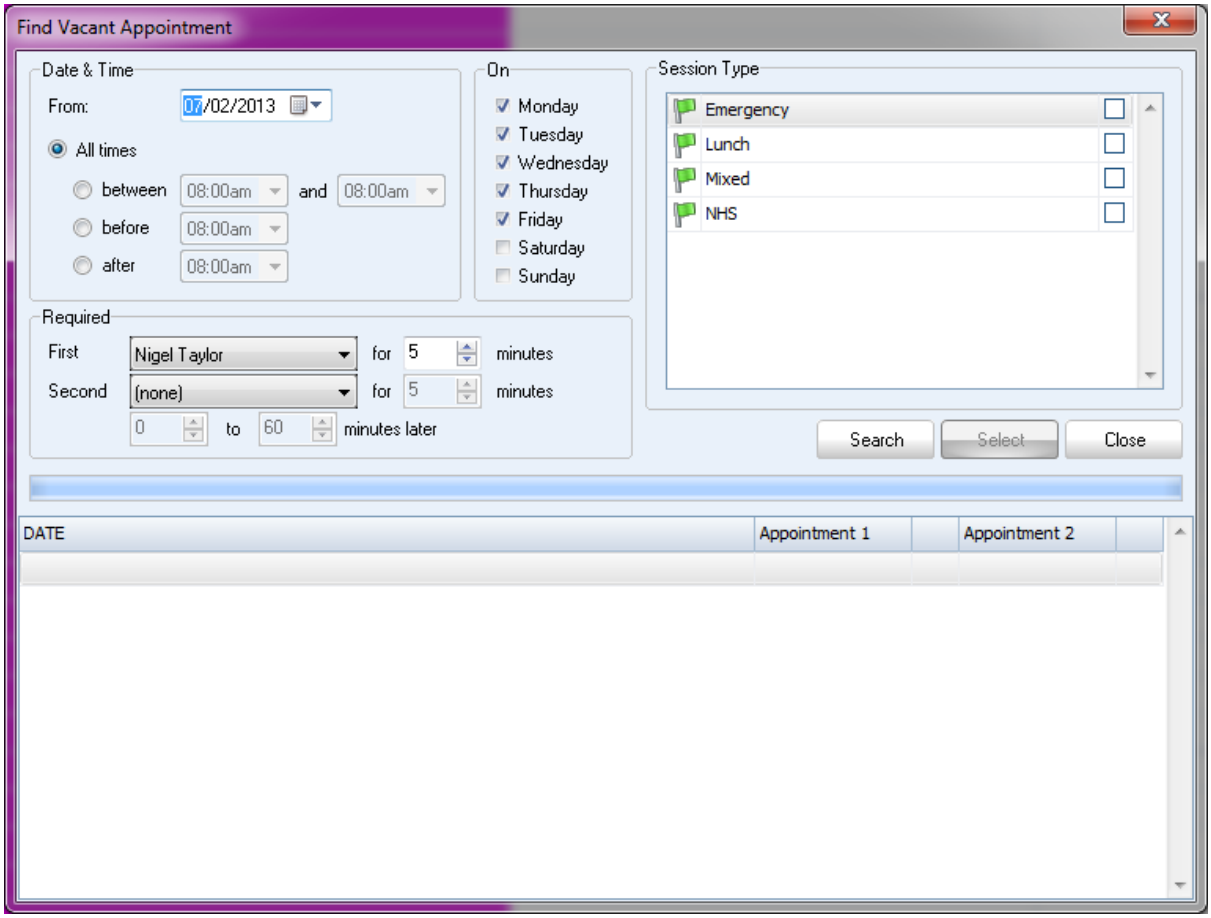
Add in any information that you need to in this window, including the duration and any colour you wish to associate with the appointment.

Vacant

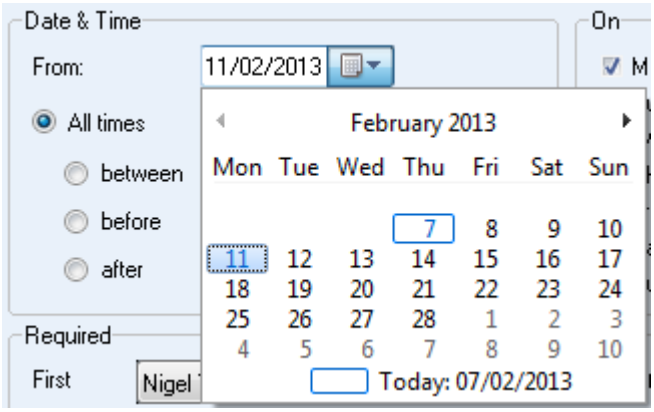
Vacant is another useful icon to get to know. It is found at the top of the appointment screen.



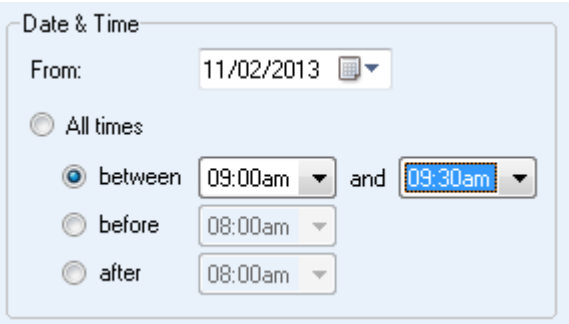
This is a great tool to quickly find an appointment slot that meets the patient's requirements. To use this tool click on the icon then you will be presented with the following screen.



There are a number of fields to choose from within this window. The first section is Date & Time. To select the date you require an appointment from either type in the date or use the calendar feature on the right hand side of the date box.

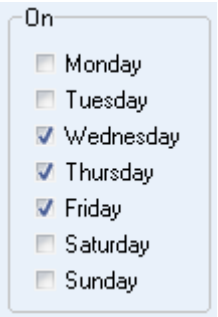


If the patient doesn't require a specific time you can leave the default select for **All time**. If the patient requires a specific time, choose one of the 3 options, between, before, or after.

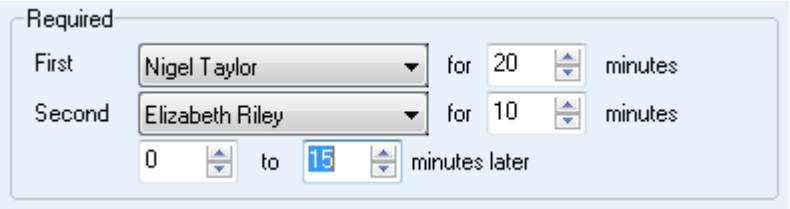


Click on your option and select the appropriate time from the dropdown box.

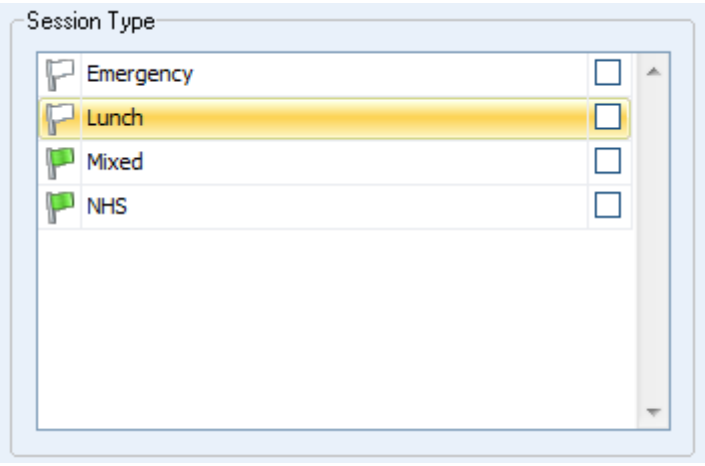
The next section is **On**. Select the preferred day(s) from the list by making sure a tick is in the box next to the desired day(s).



In the section below you can choose the performer(s) the patient is required to see and for how long. You have the ability to select the amount of time between two appointments.

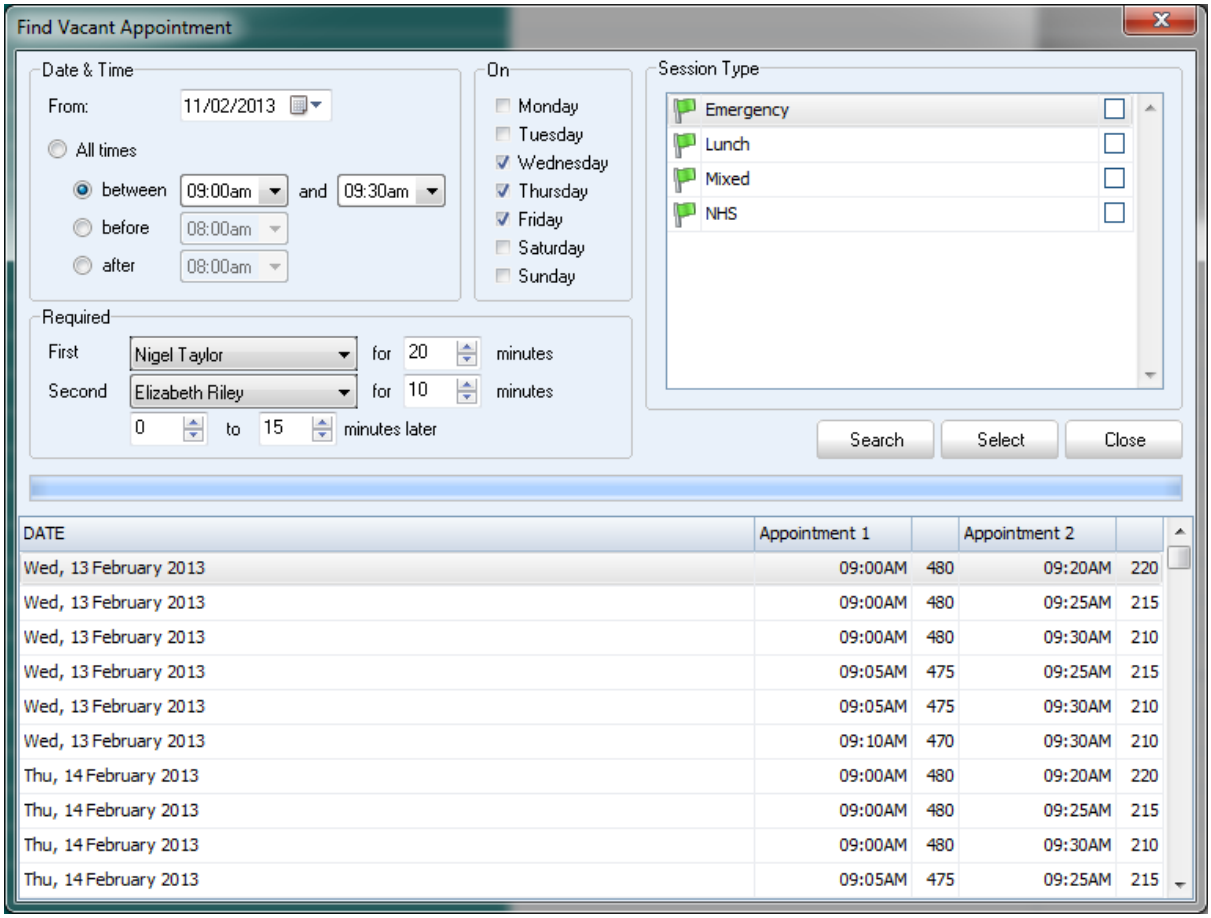


The final section to make a selection for is Session Type. This will be more important for dental practices who offer a number of schemes. Select the appropriate by clicking the flag which will then turn green.

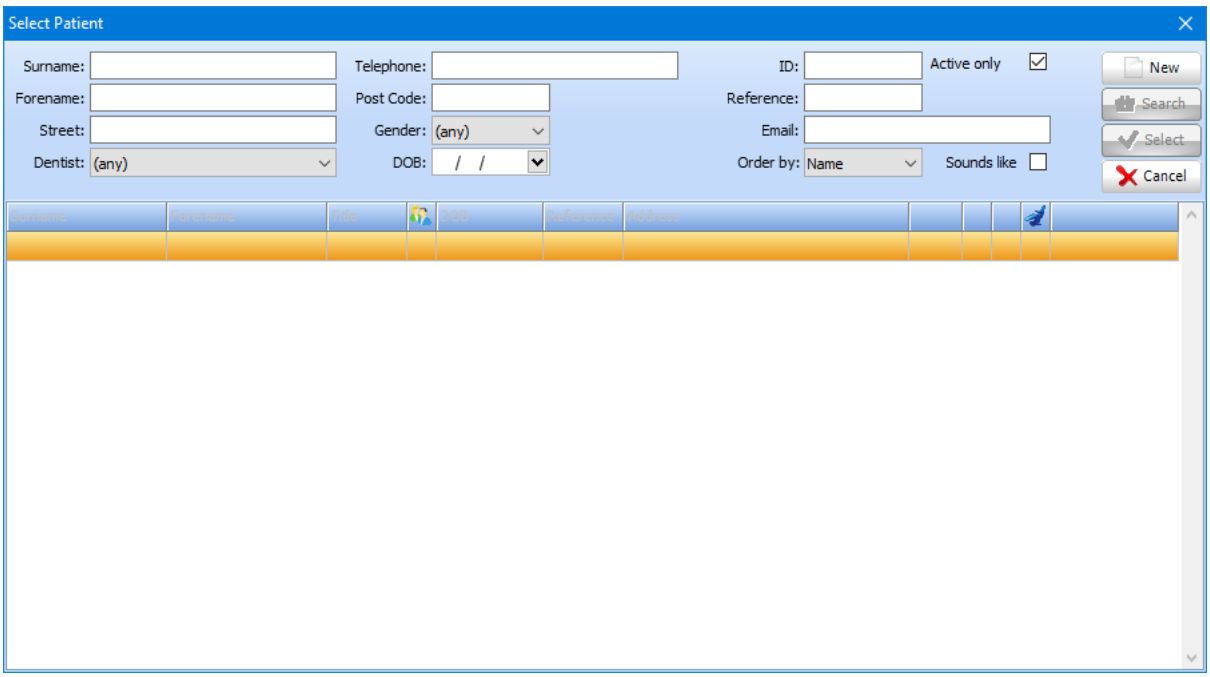


You have now entered all the necessary information. The next step is to click **Search**.

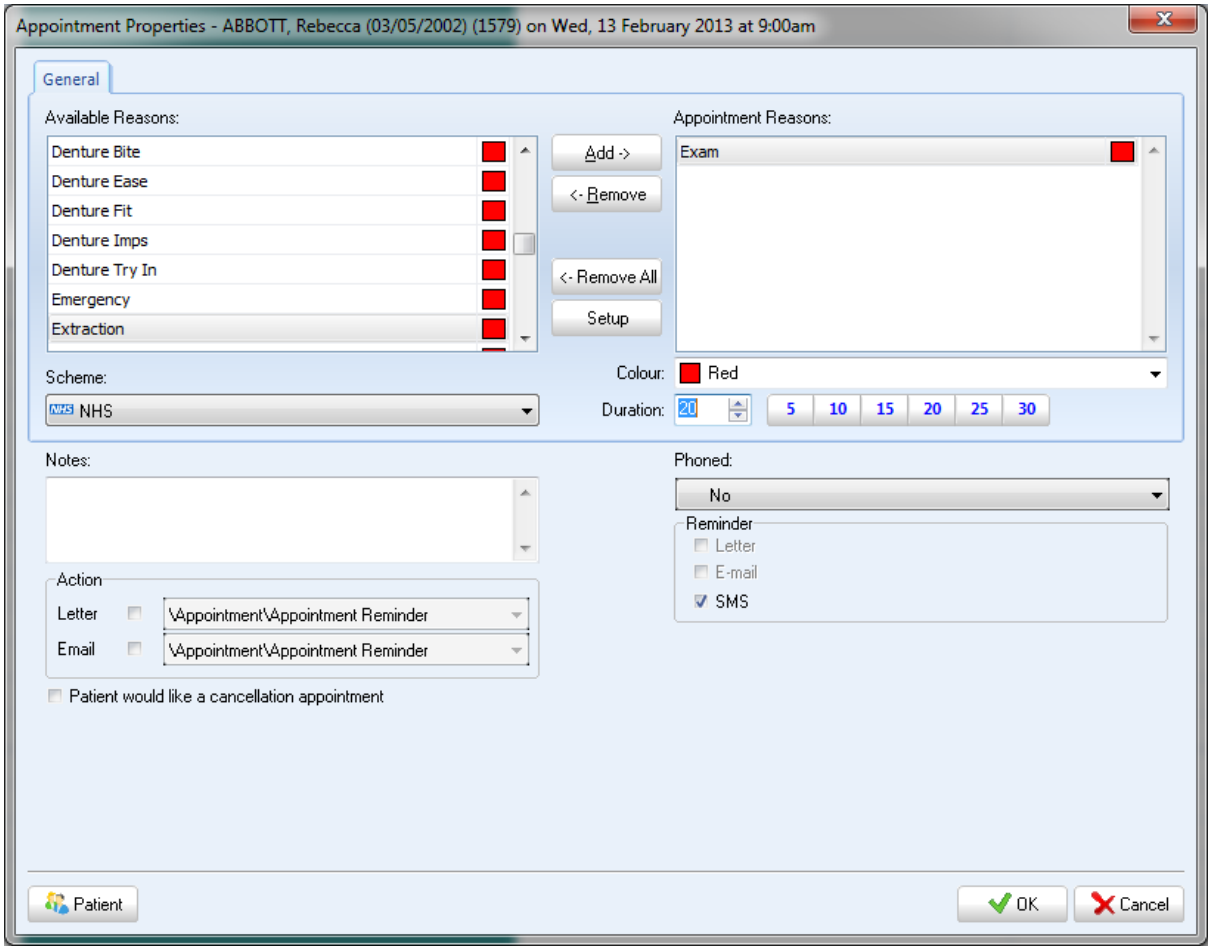
The search results for available time slots appear in the box below.



Click on the desired time slot, then click select. The select patient screen will now appear.

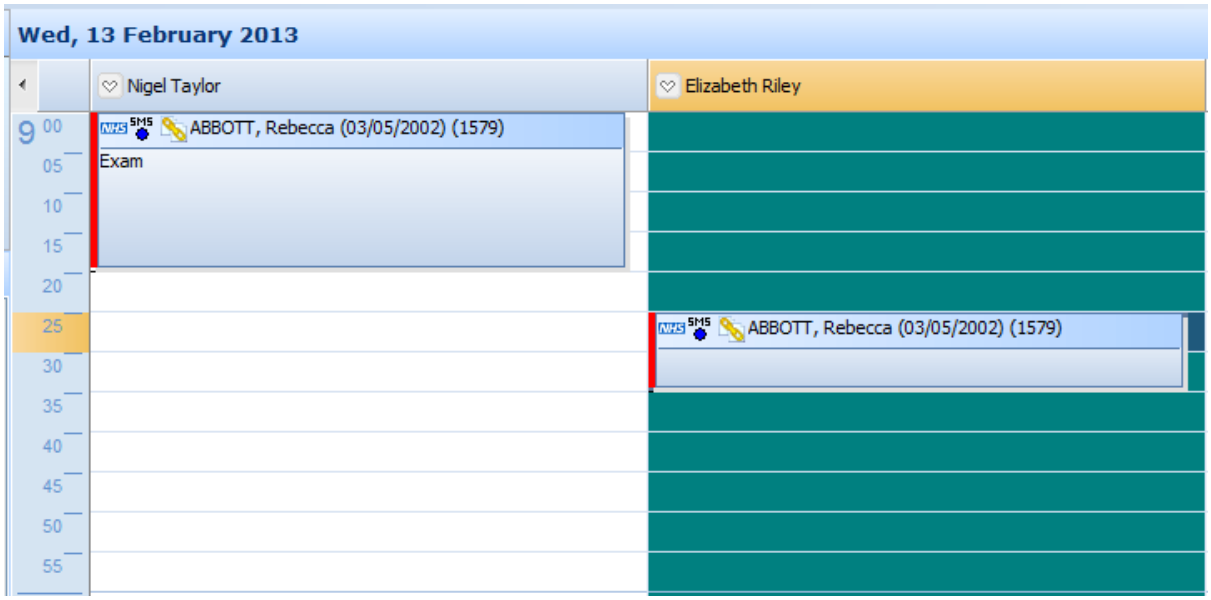


Once you have selected your patient you will be presented with the **Appointment Properties** window.



Make your selections, and then click **OK**. A second **Appointment Properties** window appears if you have requested more than one appointment.

The appointments will now exist in the appropriate time slots.

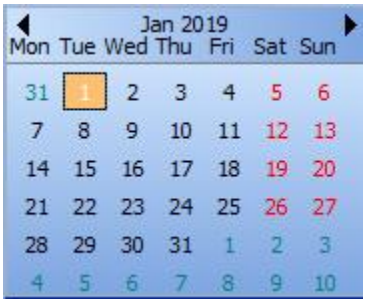


Calendar

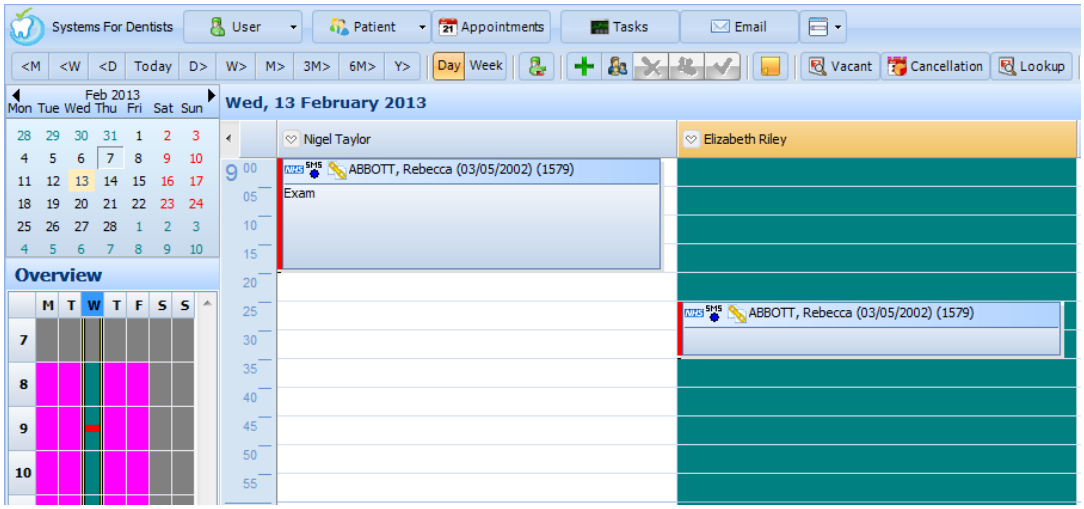
Methods of navigation

The calendar is a vital component of the appointment book. Getting to know the different methods of navigation is important for efficient use of the system.

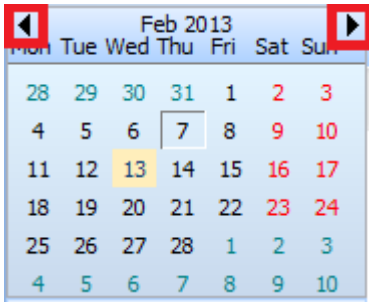
When you first open the appointment screen by clicking the **Appointment** button, the calendar will open on the current day.



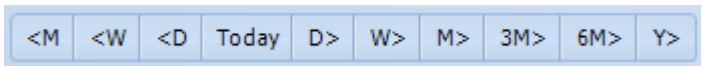
To select another date within the same month, click on the desired date. You will then be presented with the appointment book(s) for the day selected.



There is a few different ways you can navigate through different weeks and months in the calendar. You can click on specific days and use the arrows to navigate from month to month.



Alternatively you can use the buttons at the top of the screen.



The buttons to the left of **Today** are for navigating to dates in the past and the buttons to right are for navigating to dates in the future.

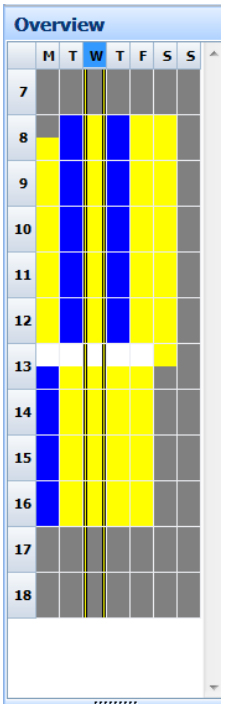
Overview

The overview is a very useful element of the appointment screen. At a glance you can see available appointment slots and different session types for a particular dentist.

You can setup different session types within SFD. This is useful for adding in emergency times as well as if you are a mixed practice that deals with both NHS and private patients you can easily distinguish between the two by creating different session types.

By setting up session types and associating colours to them you can see at a glance where you need to book certain appointment to make sure they are being booked in appropriate time slots.

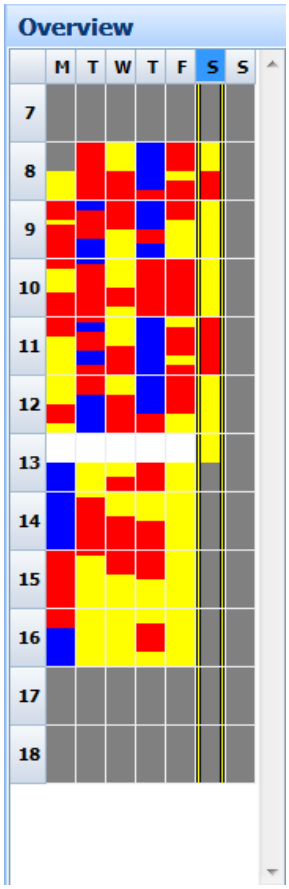
The overview is situated in the left hand side of the appointment screen.



The overview displays the appointment times for the dentist you have selected. The overview shows the days across the top and the time down the side. In this example this particular dentist works Monday to Saturday (the grey areas being where the dentist is not working). The performer's lunch hour is displayed in white. In this example private appointment slots are shown in yellow and the NHS in blue. The example above is a blank week with no appointments booked.

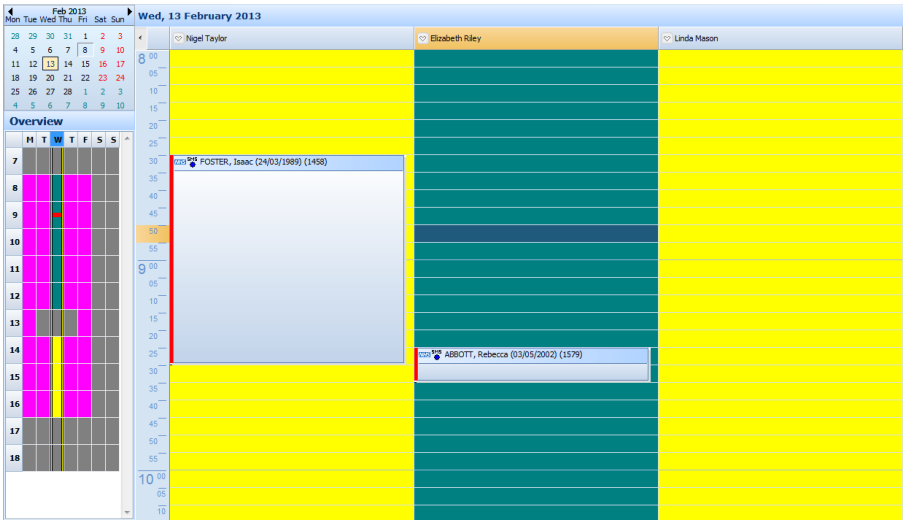
Refer to the Setup section of the manual to setup different session and appointment colours.

The overview shown below is how it would look once appointments have been booked (dependant on the colour system). In this particular example appointments show up as red time slots on the overview.



Selecting different performers to view

To view a different performer's overview, select the performer my clicking on their book within the main appointment screen. You can tell if a performer is selected as their name will be highlighted in yellow.

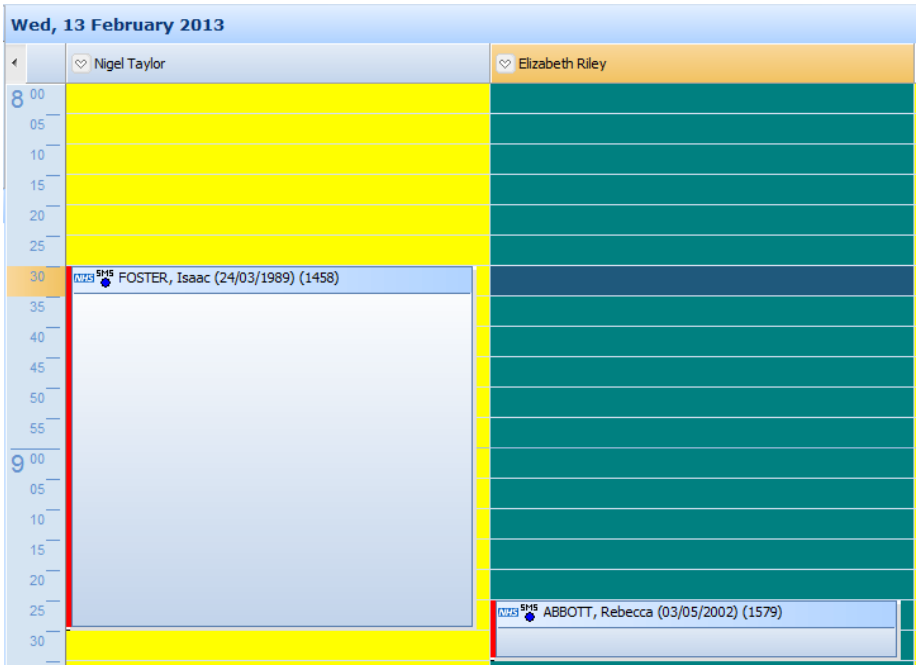


In the example above Elizabeth Riley is the performer who has been selected.

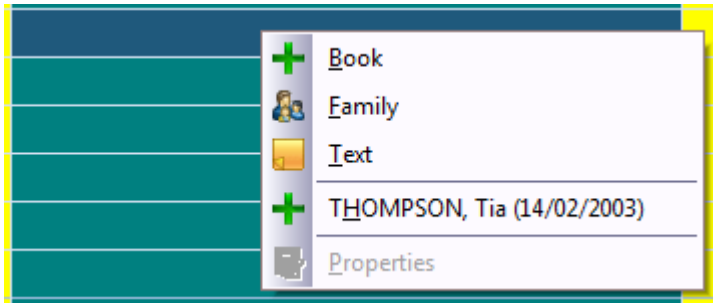
Booking appointments

Earlier in this chapter when we were exploring the different icons within the appointment screen we explored the **Book** and **Book family appointment** icon. You may be comfortable using the icon and booking appointments in that way. However there is an alternative method that you may prefer.

First of all navigate to your desired time slot. The next step is to select the time slot by left clicking on the slot, once selected the slot will turn blue.



In the example above we have selected a time slot at 8.30 AM on Wednesday 13th February with Elizabeth Riley. Now that you have the time slot selected, right click on the slot and you will be displayed with the menu shown below.



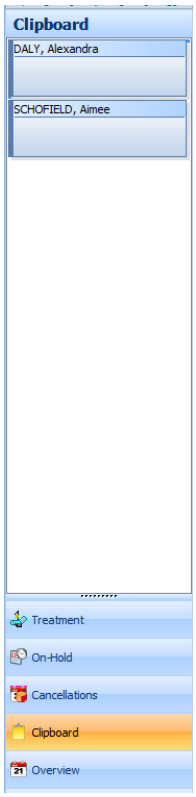
From this menu you have similar icons that are presented at the top of the appointment screen. To book an appointment, select Book from the menu. From here you will be taken through the same process that was followed when using the **Book** option.

The same principle applies with **Family** and **Text** appointments.

Booking patients on the appointment clipboard

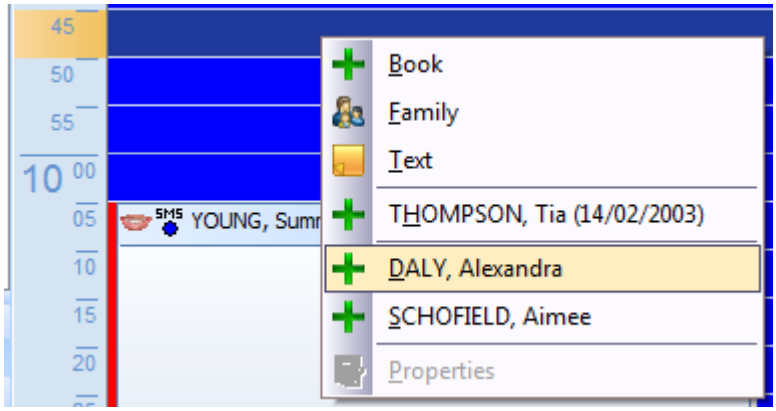
In the treatment section we learnt how to add patients to the appointment clipboard. You have two ways of accessing the appointment clipboard.

The first way to access the appointment clipboard is from the left hand side of the appointment screen or on the right hand side if you have split view enabled (featured later in this chapter).

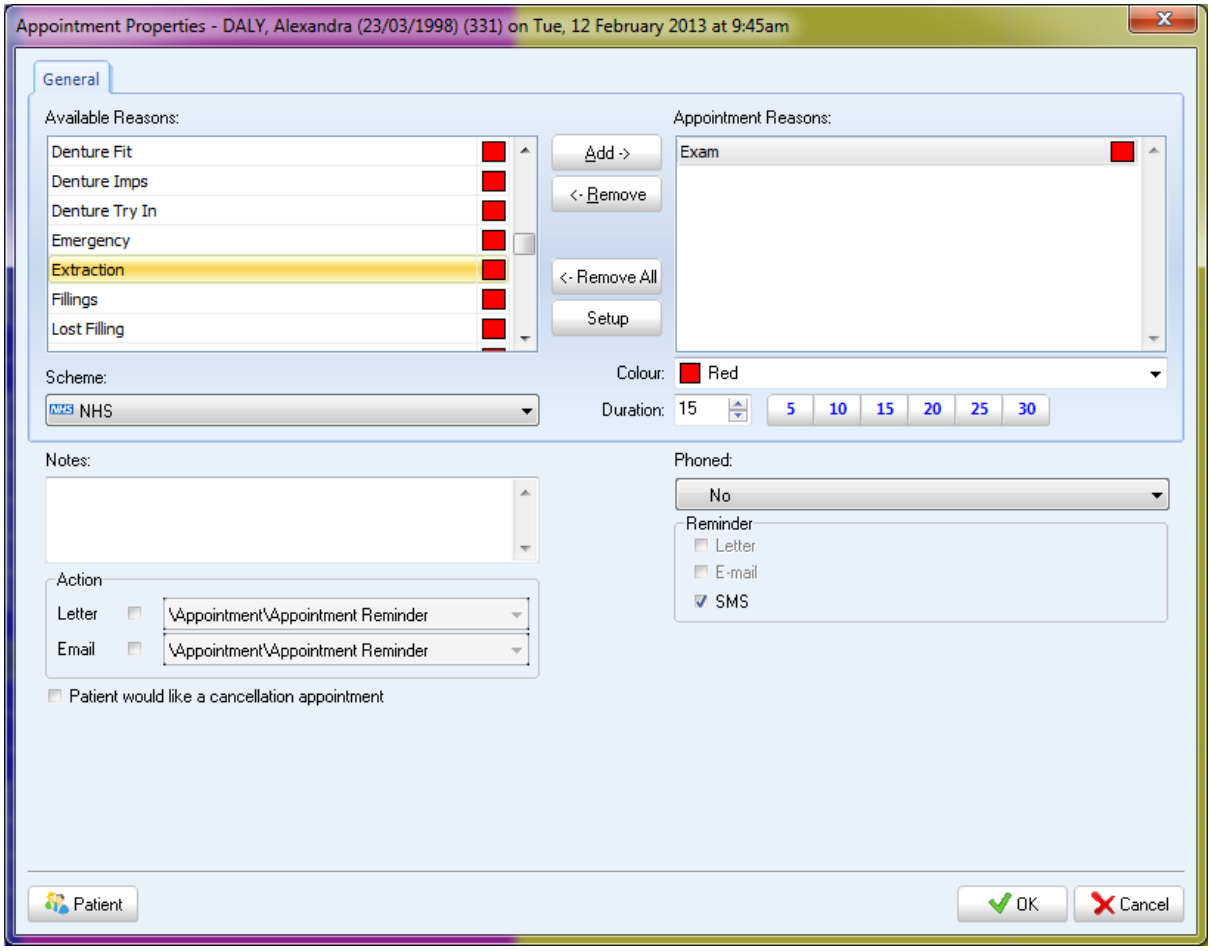


In the example above there are two patients on the appointment clipboard. From here you can drag the appointment from the clipboard into the desired time slot.

Alternatively, patients that have been added to the appointment clipboard can be access by right clicking on a selected appointment as shown below.



Click on the desired patient from the list and then you will be presented with the **Appointment Properties** window.



Click **OK** to confirm the appointment.

Changing Appointments

There will be times when you are required to change appointments. This may be the time, date or duration of the appointment. This section of the manual will walk you through how to make various changes to an appointment.

Same date

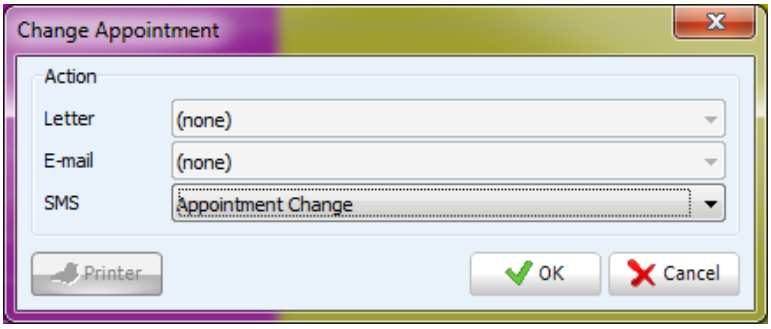
There may be circumstances where you are required to move patient appointments to a different time slot on the same day or to a different performer.

Select the appointment you wish to move by clicking on it.

In the example above we have an appointment at 12.30 PM on Monday, 11th February 2013 for the patient Charlotte Ziegler selected. The patient requires an earlier appointment at 11.30 AM on the same day with the same performer, Nigel Taylor.

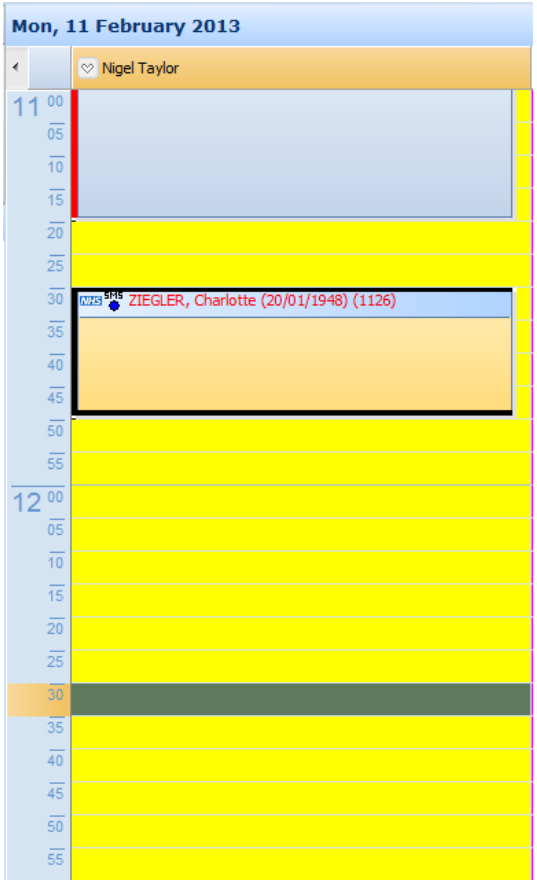
To perform this move, hover over the appointment until the cursor changes to the crosshead icon , then hold the left button of your mouse in, drag the appointment to the desired time slot, release the left button of your mouse when the appointment is in the correct time slot.

When you release the left button on your mouse you will be presented with the following window.



Depending on your setup you have the choice of three options, Letter, E-mail or SMS. In the example above we only have the option of SMS as the Letter and E-mail options have been disabled. You are able to choose an SMS template to send which is then prepared as soon as you click **OK**.

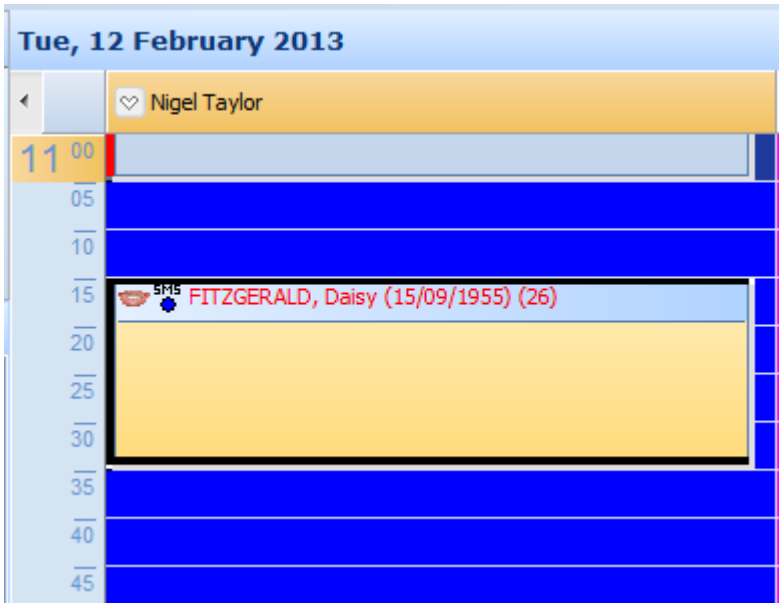
The appointment will now have been moved to the new time slot.



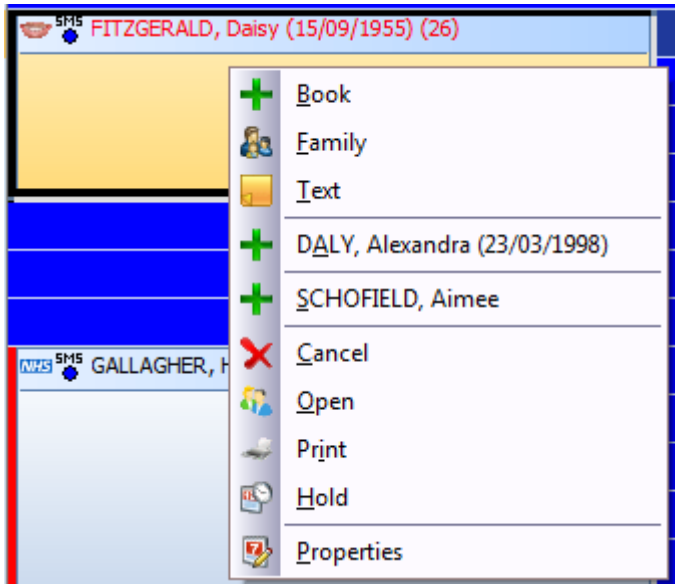
Note: To move an appointment to a time on the same day but to a different performer the principle is exactly the same. Select the appointment, then drag and drop to the appropriate time slot under the different performer.

Different date (Hold appointment)

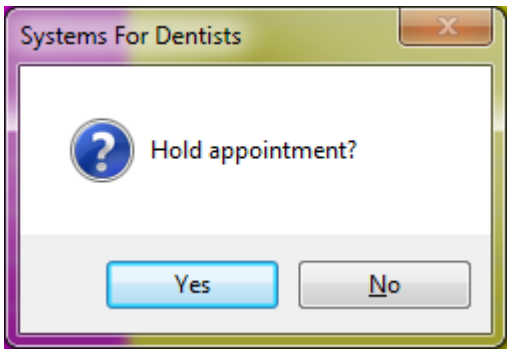
There are a few extra steps required when you need to move an appointment to a different day. The first step is to select the appointment you wish to move to a different day.



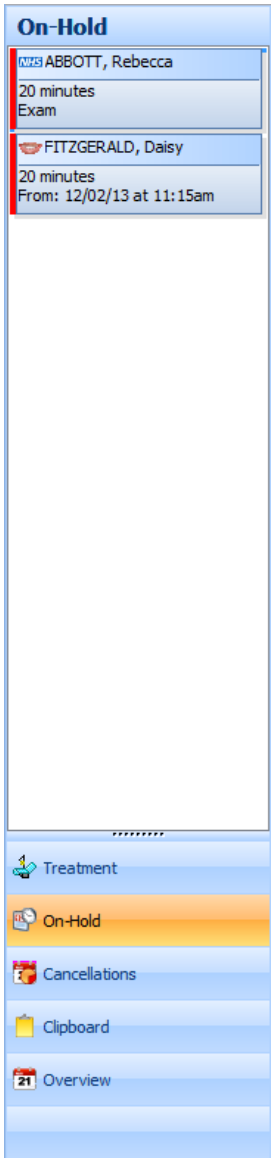
Once you have selected the appointment right click so the menu shown below appears.



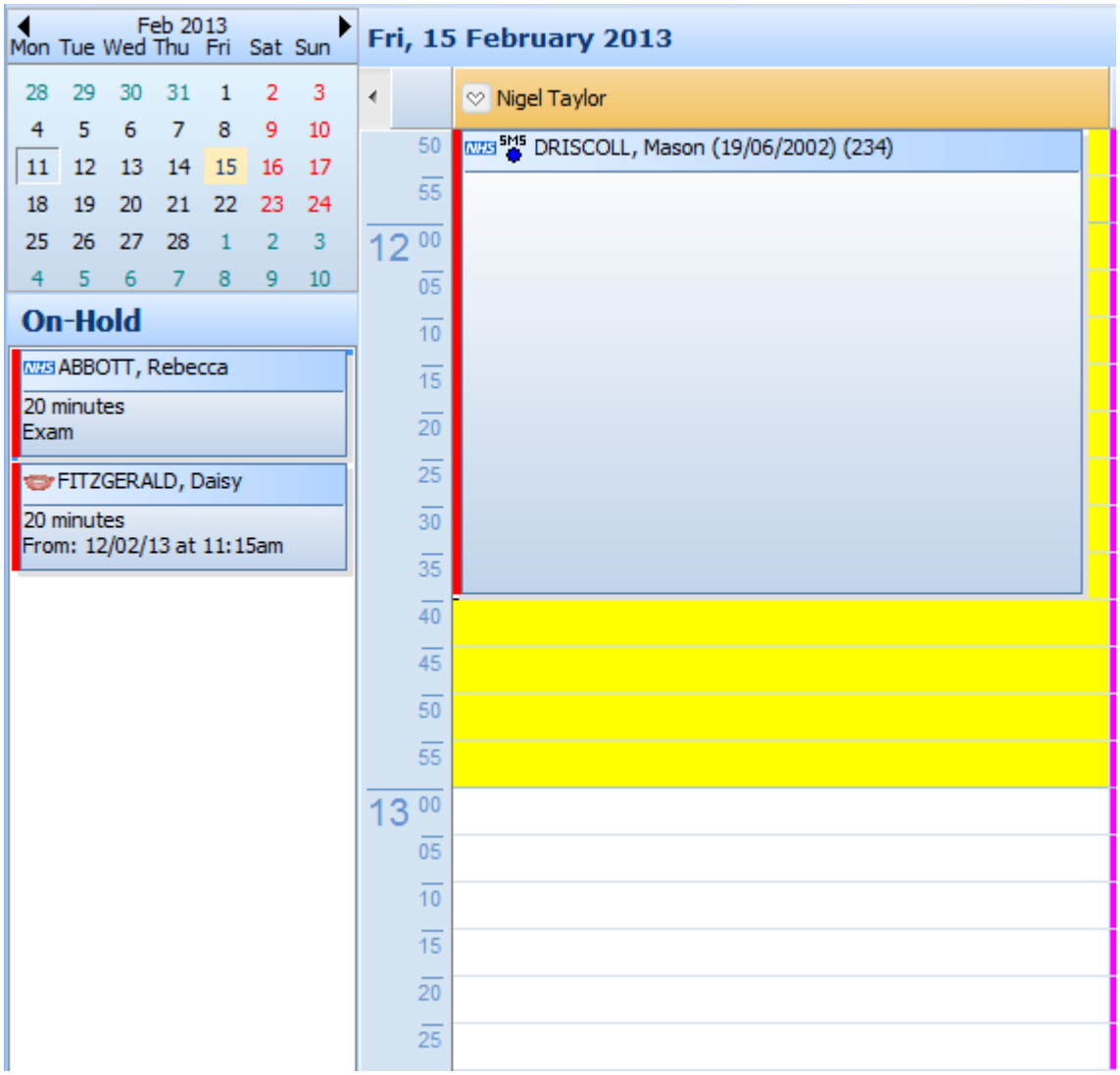
From the menu, click **Hold**. You will then be presented with the screen asking you to confirm.



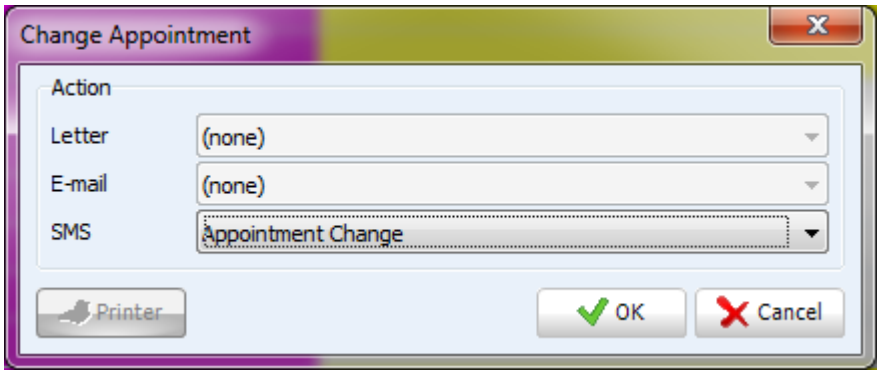
Once you have clicked **Yes** the appointment will be placed in the hold list. The hold list can be accessed from the left hand side of the main appointment screen (or in the far right hand corner if split view is enabled).



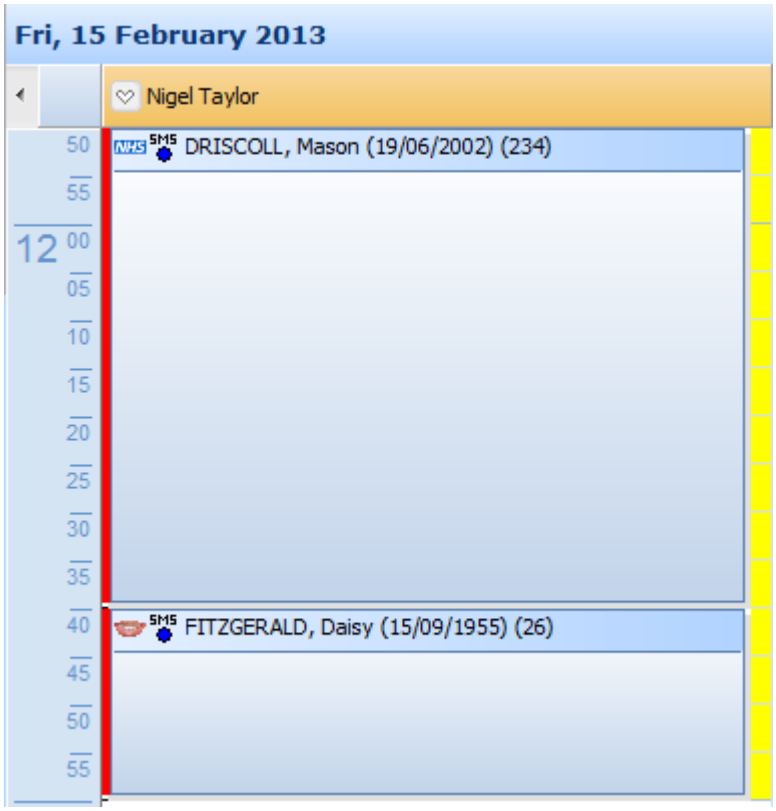
From the example above we have two patients in the hold list. You can see the patient Daisy Fitzgerald who we place on hold. The next step is to navigate to the appropriate day you wish to move the appointment to. Once you are on the desired day, drag the appointment from the hold list to the new time slot.



In this example we are going to change the appointment to 12.40PM on Friday, 15th February 2013. Again, when you release the left button on your mouse you will be presented with the **Change Appointment** window.



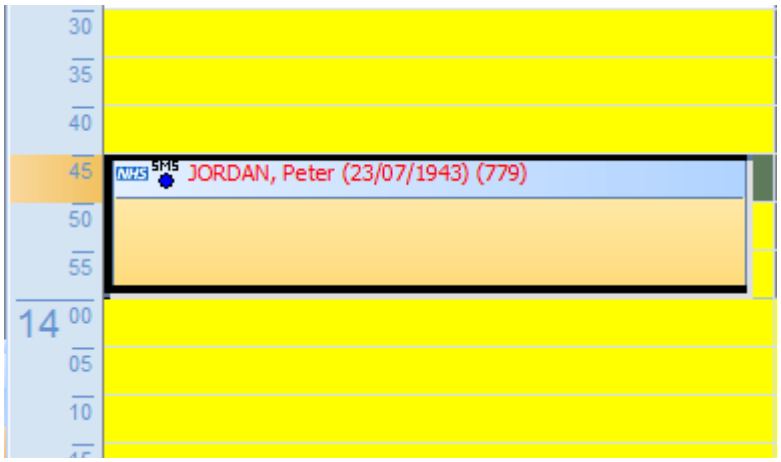
Select the appropriate action, then click **OK** to confirm. The appointment will now have been changed to the new date.



Extending/shortening appointments

There will be times where patient appointments need to be extended. Fortunately in SFD v6 this is something that is very easy to do.

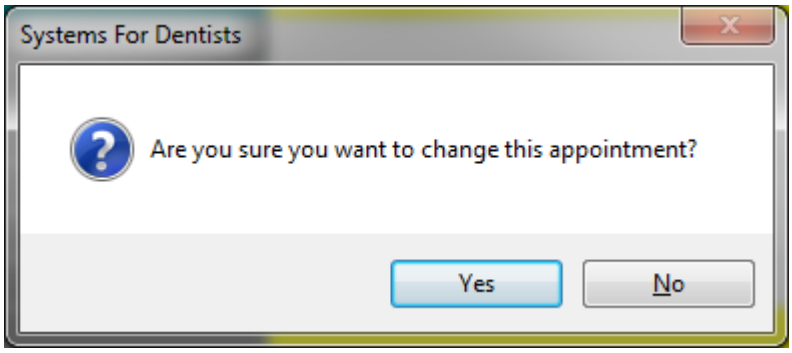
First of all, navigate to the appointment that you wish to extend. Select the appointment by left clicking on the appointment so it becomes highlighted.



Once the appointment is selected you can hover over the top or the bottom of the appointment and your mouse cursor will change to ↕ .

You can now drag the bottom or the top of the appointment to the desired length.

This technique can be used for lengthening or shortening an appointment. Once you have extended or shortened the appointment, you will be presented with a confirmation window.

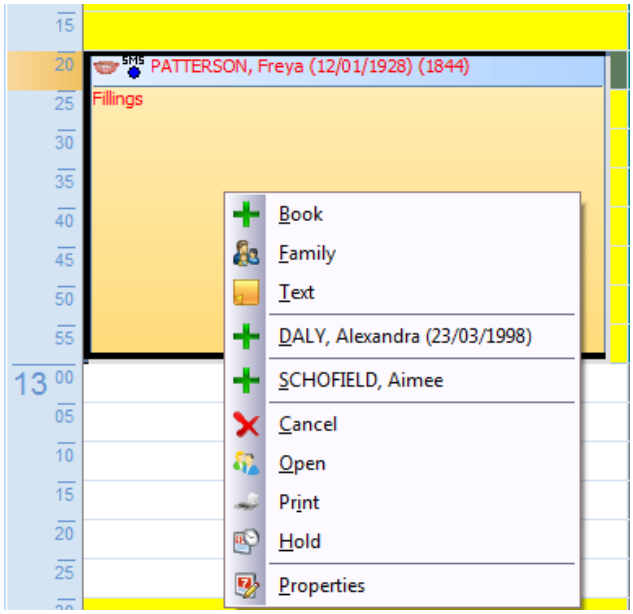


Click **Yes** to confirm.

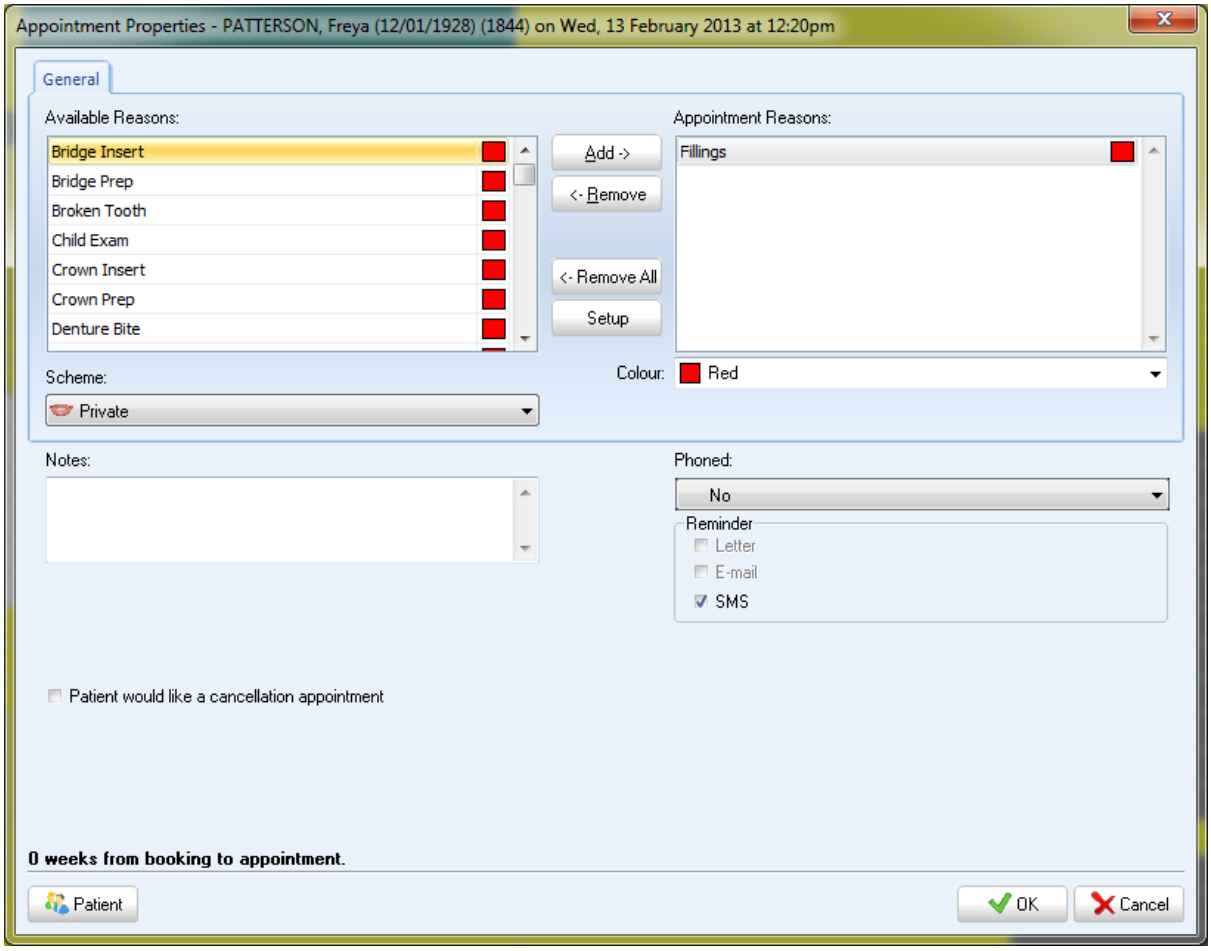
Properties

At any time you are able to select the properties and make any changes that are necessary. To do this, select the appointment by left clicking.

To access the properties of the appointment, right click on the appointment once highlighted and you will be presented with the following menu.



From this menu, select **Properties**. The **Appointment Properties** window appears.



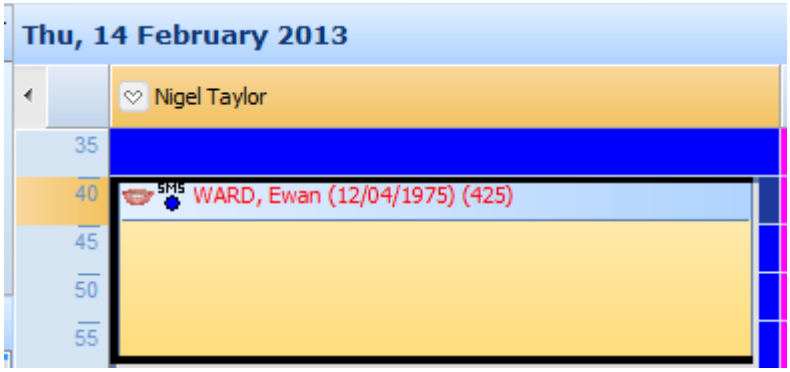
You can now make any changes you feel necessary, click **OK** to confirm any changes.

Cancelling Appointments

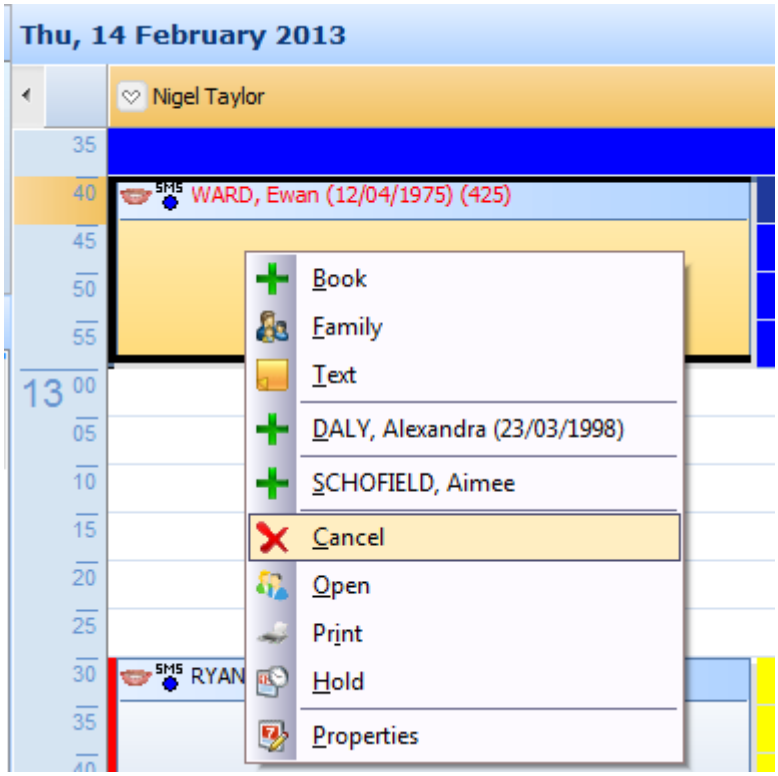
Single appointments

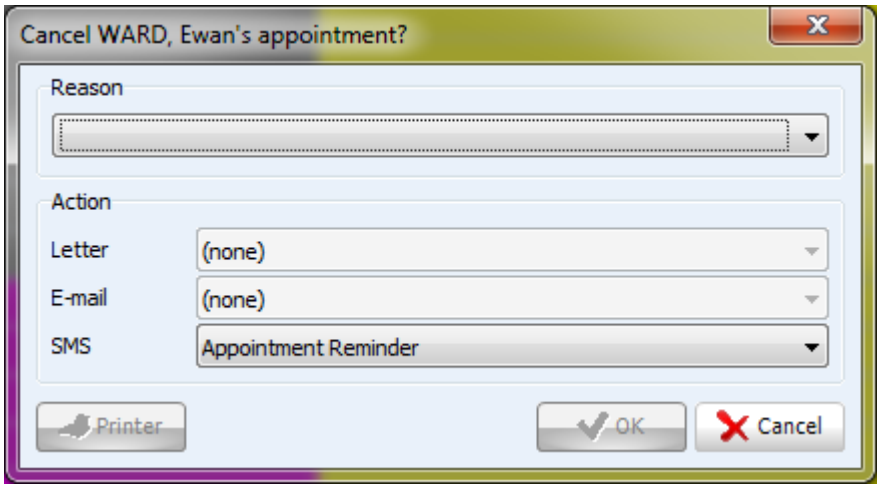
There will be circumstances where you will need to cancel patient appointments, whether this is requested by patient or by the practice.

First of all, navigate to the appointment. Select the appointment by left clicking so the appointment becomes highlighted.



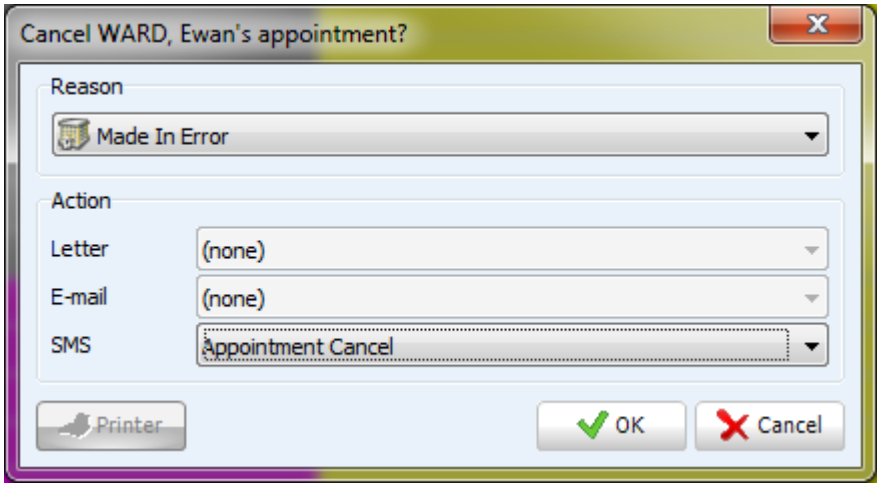
Now you have selected the appointment, right click and select **Cancel**.





From this window you can select the reason for cancelling, then process a cancellation letter, email or SMS (depending on the patient's contact preferences).

To add cancellation reasons refer to the setup section of the manual.



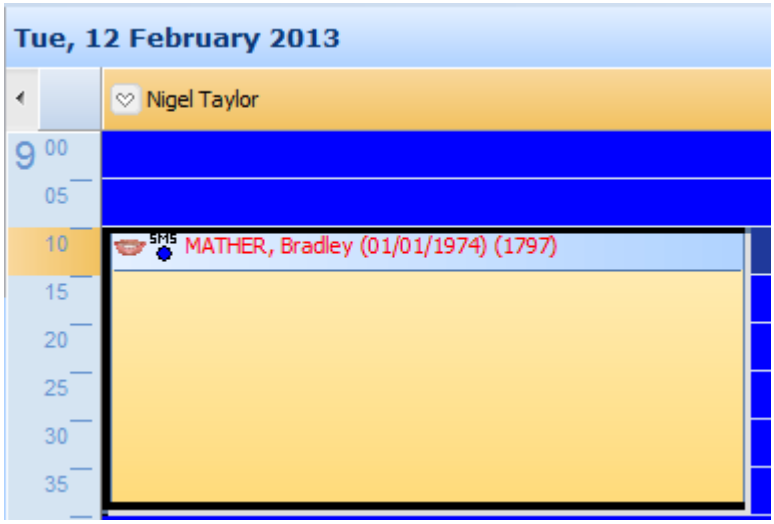
Once you have made your selection click **OK** to confirm the cancellation.

Marking patients as…

SFD v6 has the ability to mark the patient as 'Arrived', 'In Surgery', and as 'Departed'. This does not only help the dentist in the surgery, making them aware of any patients that may be waiting for them but it can't help the practice in general to target improvement. This is because reports can be generated on waiting times, this is the time between the start of the patient's appointment and when they got marked as 'In Surgery'.

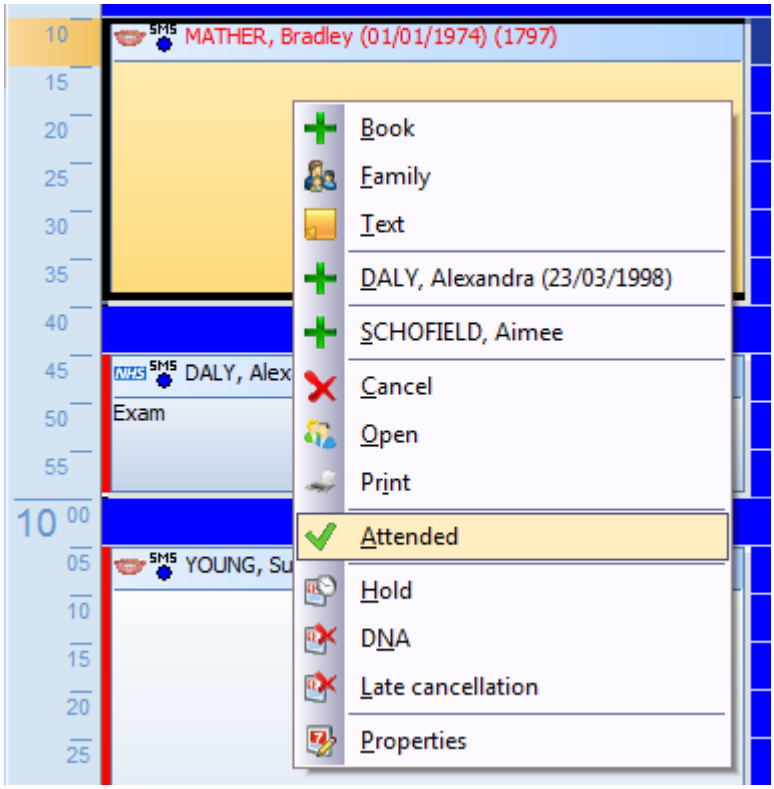
Arrived

As soon as a patient arrives to the practice they should be marked as such in your practice management software. To do this, first of all highlight the patient's appointment.

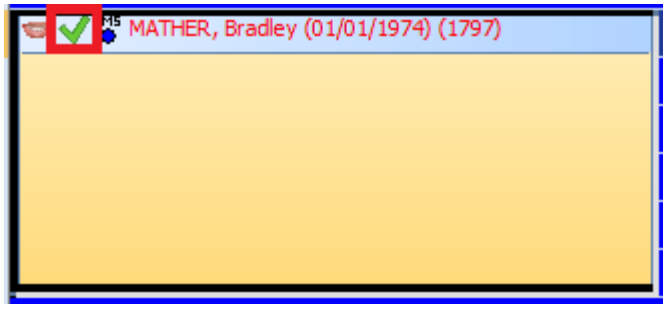


You have two ways of marking the patient as 'Arrived'. At the top of the screen you have the **Attended icon**. Click this icon to change the patient status to 'Attended'.

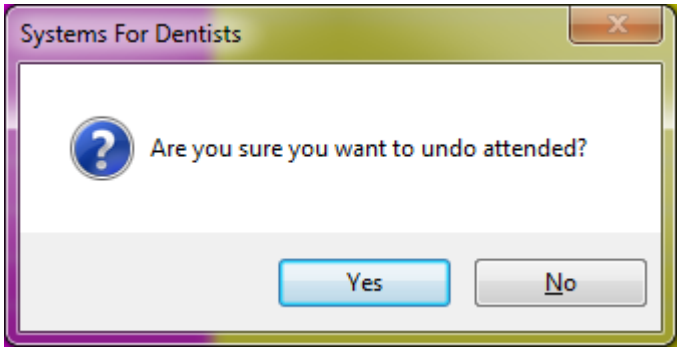
Alternatively, once you have selected the appointment right click and select **Attended**.



Once you have clicked **Attended** you will see the green tick in the appointment (example below).



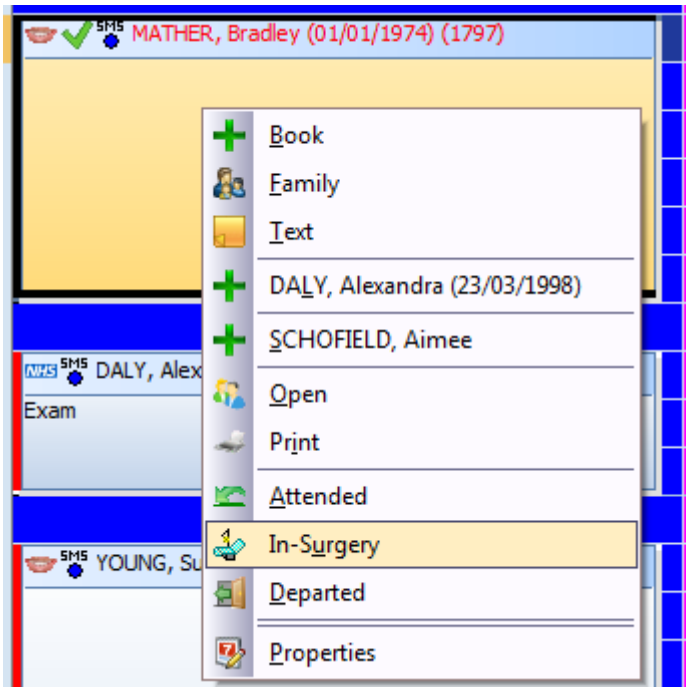
Tip: If a patient was marked as 'Attended' in error, click 'Undo' then 'Attended' and you will be presented with the following window. The same applies for In Surgery and Departed.



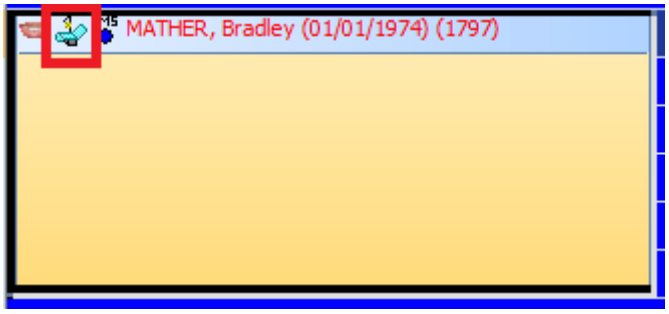
In Surgery

To keep an accurate observation of waiting times, it is important to mark the patient as In Surgery when they leave the reception to enter surgery.

Select the appointment by clicking on it. Right click, and then you will be presented with an updated version of the menu.



The icon will update on the appointment (example below).



Departed

The final step is to mark the patient as **Departed** once their appointment in surgery has been completed.

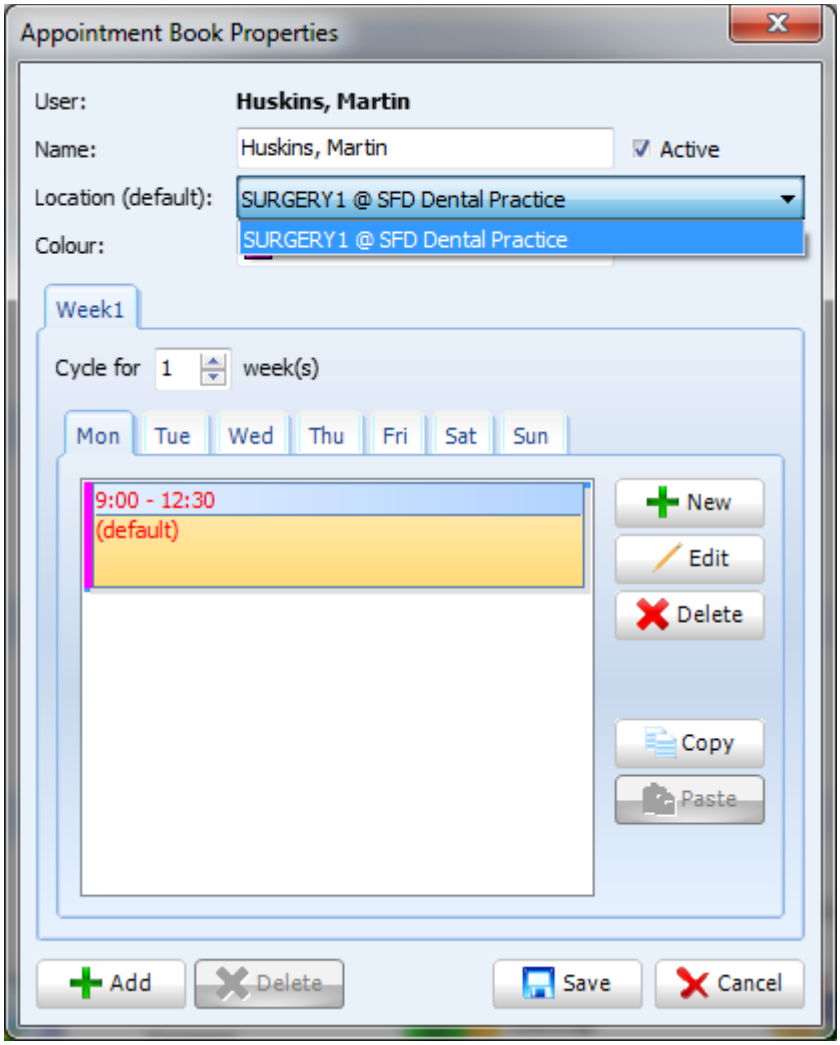
Similar to **Attended** and **In Surgery**, select the patient appointment by clicking on it. Once selected, right click to bring up the menu.

Select **Departed** from the menu. The icon will then be updated on the appointment.

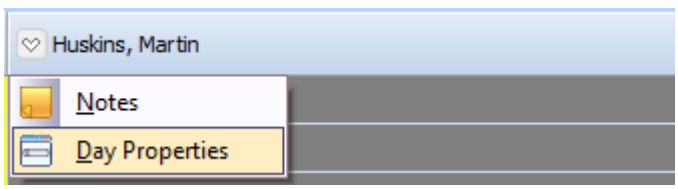
Waiting list (gingerbread men)

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

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



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

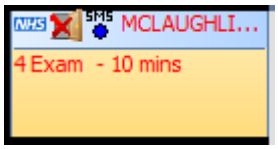


The Appointment Book Properties window will open. Select the desired time slot by double clicking on it. A Session Properties window appears. Select the location from the Location drop down menu.

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

The Gingerbread man appears green when the patient's appointment is scheduled to start. The Gingerbread man appears black up until the time of the scheduled appointment. After 5 minutes green Gingerbread men will turn yellow, after 10 minutes the yellow will turn to red. This acts like a traffic light system which can assist you with prioritising patients. A maximum of 3 Gingerbread men will be shown at a given time. The most recent will be shown.

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



By hovering over the Gingerbread men you will be able to see how many minutes due or overdue the patient is for the designated appointment.

If you click on the Gingerbread men it will give you a Patient Waiting list which states the time they have been waiting and the time they are overdue.

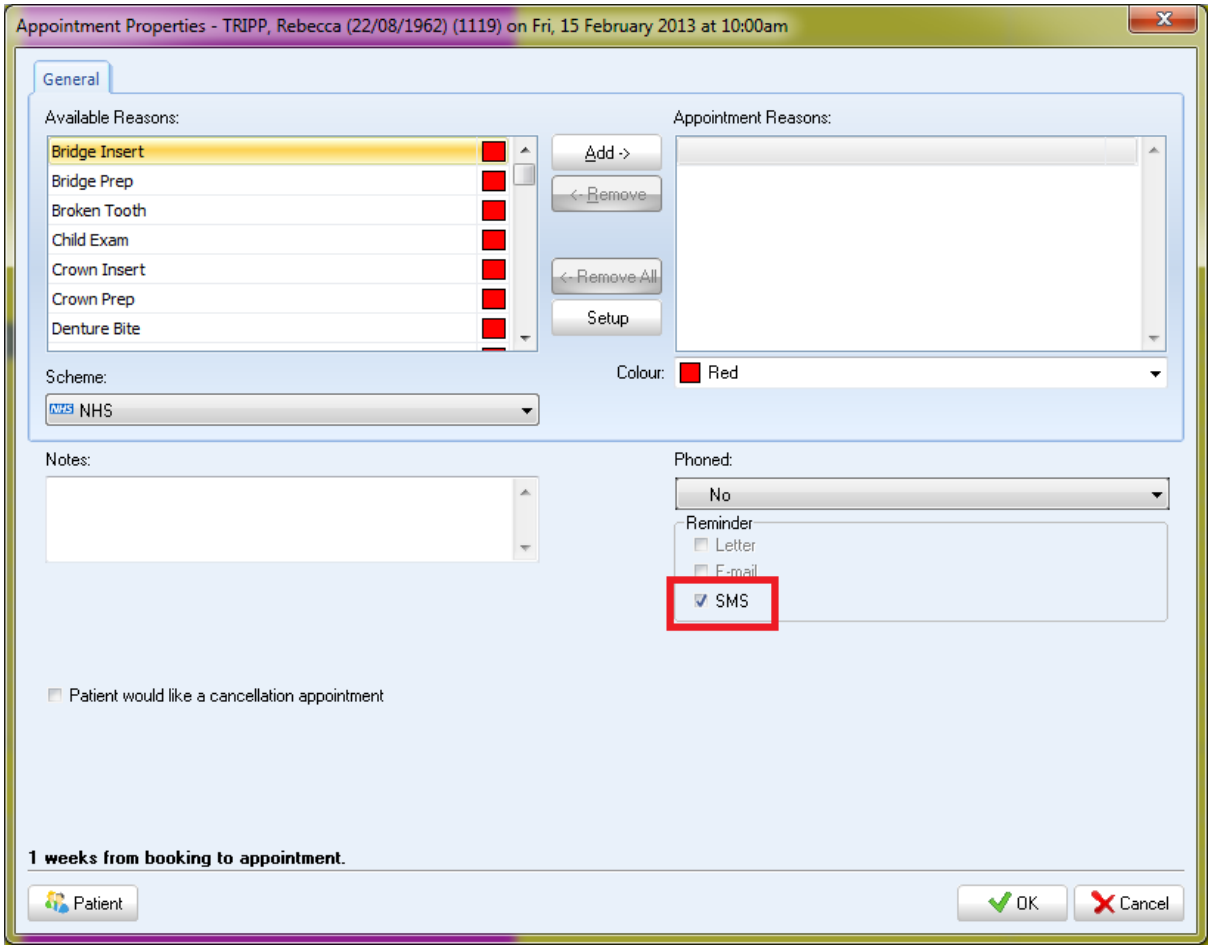
As soon as **Seen** is clicked the patient will be removed from this list.

SMS Reminders

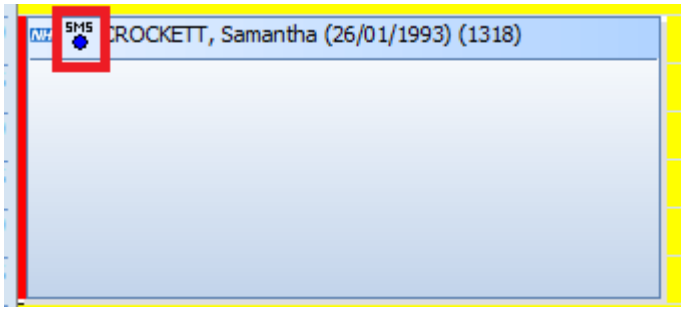
SMS reminders completely automate your appointment reminder system. They work from a schedule that will send the patient an appointment reminder message from 24hrs up to 2 weeks before the appointment depending on your setup.

To find out more about SMS contact Sales on 0845 643 2828.

The schedule will automatically send to any patients that you have selected that they would like to receive an SMS reminder. You will have chosen this when booking the appointment, in the appointment properties window.


Appointment Properties - TRIPP, Rebecca (22/08/1962) (1119) on Fri, 15 February 2013 at 10:00am
General
Available Reasons:
Bridge Insert
Bridge Prep
Broken Tooth
Child Exam
Crown Insert
Crown Prep
Denture Bite
Add ->
<- Remove
<- Remove All
Setup
Appointment Reasons:
Scheme:
NHS
Colour:
Red
Notes:
Phoned:
No
Reminder
Letter
E-mail
SMS
Patient would like a cancellation appointment
1 weeks from booking to appointment.
Patient
OK
Cancel

On the appointments you we will see coloured SMS dots (example below).



These dots will change colour depending on their status. The list below shows the various colours and what they state.

Pending: Reminder has been set, but not yet sent.

Prepared: Reminder has been prepared and is waiting to be sent.

Sent: Reminder has been passed sent, waiting for response from gateway.

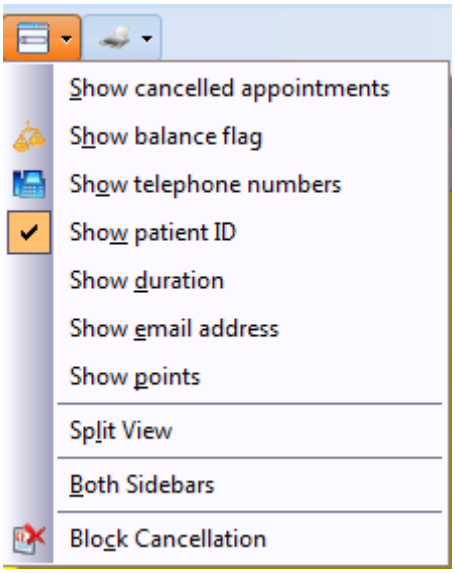
Delivered: Reminder was delivered to the number requested.

Failed: Reminder was not delivered to the number requested.

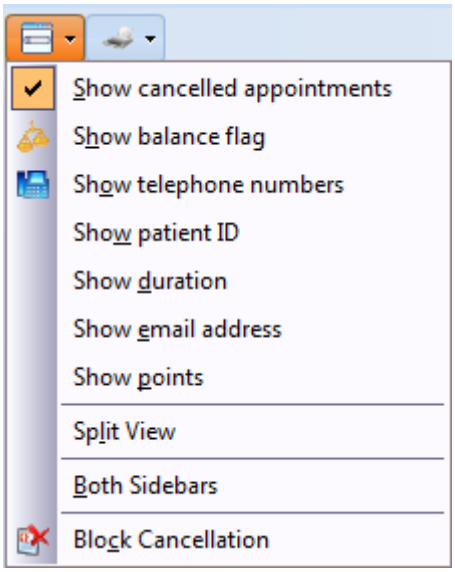
Invalid number: The number provided was invalid.

Appointment Book Options

You have a degree of personalisation available to suit your appointment book preferences in SFD v6. These options are accessed via the button pictured below situated towards the top of the main appointment screen.



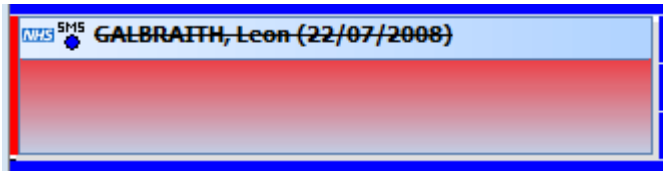
To enable any of these options, click on the option from the list. Once selected, a tick will be shown adjacent to the setting.



From the example above the only selected option is **Show cancelled appointments**.

Show cancelled appointments

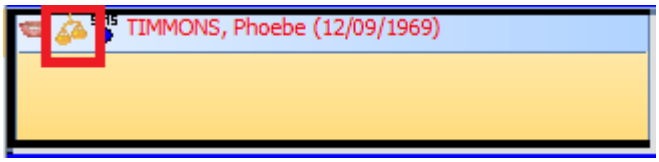
By enabling this option any appointments that have been cancelled are visible in the appointment book. The image below shows how they will be displayed.



Note: the time slot that the cancelled appointment takes up will be vacant in the 'Overview' so you are able to book another appointment in this time slot.

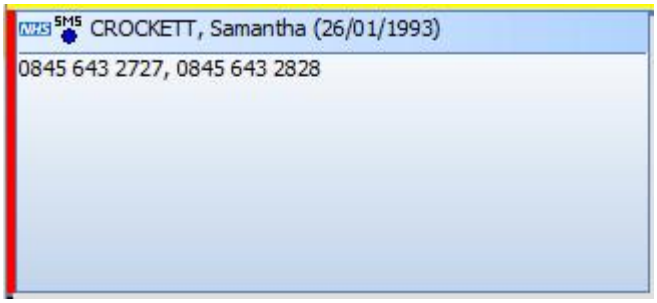
Show balance flag

Show balance flag displays an icon on the appointment that symbolises that the patient has an outstanding account.



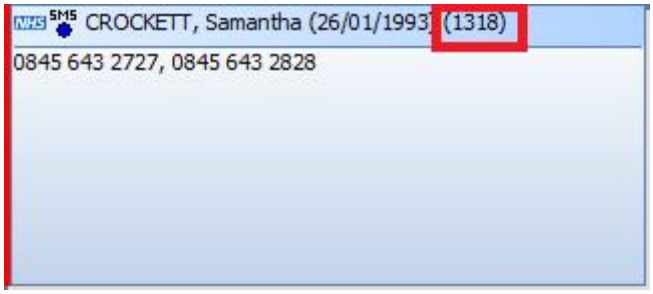
Show telephone numbers

Show telephone numbers displays patient telephone number(s) on the appointment.



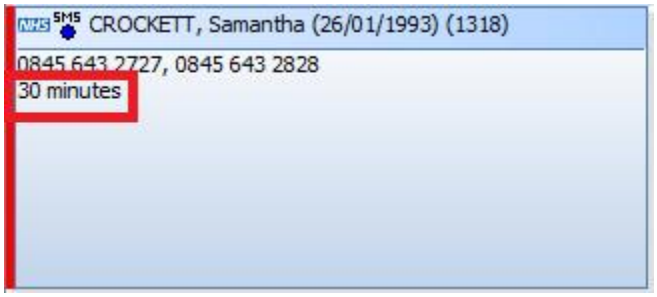
Show patient ID

Show patient ID displays the patient's identification number.



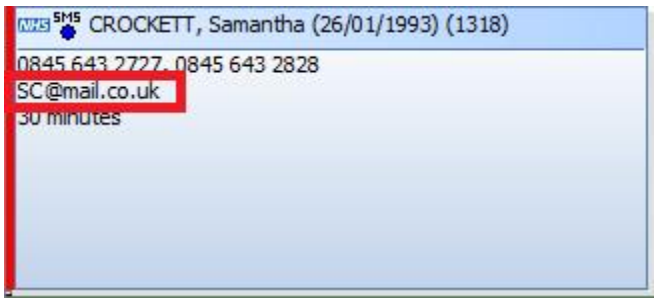
Show Duration

Show duration displays the duration of the appointment.



Show email address

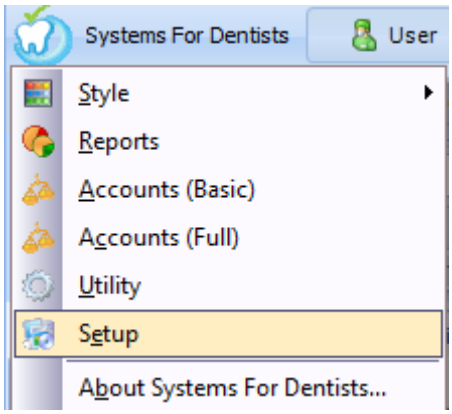
Show email address displays the patient email address.



Show points

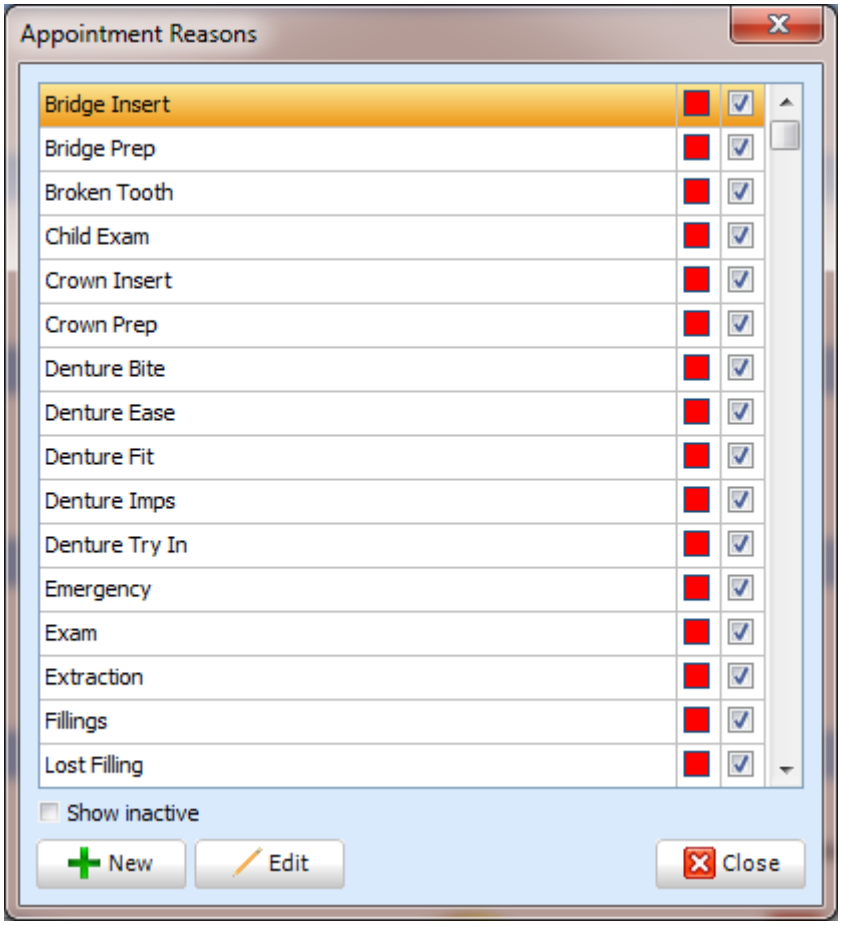
The points system allows you to assign a numerical value to appointment reasons, supplying an at a glance score for any given day. One example of this is to assign examinations 1 point, basic treatments (fillings, reattaching crowns etc.) 2 points and endodontic work 3 points. This would give a numerical value to a day which reception could use as an upper limit or target. As this system is unique to your practice, you have the choice as to how utilise this facility.

The first step is to enter **Setup** by clicking the tooth icon at the top left.

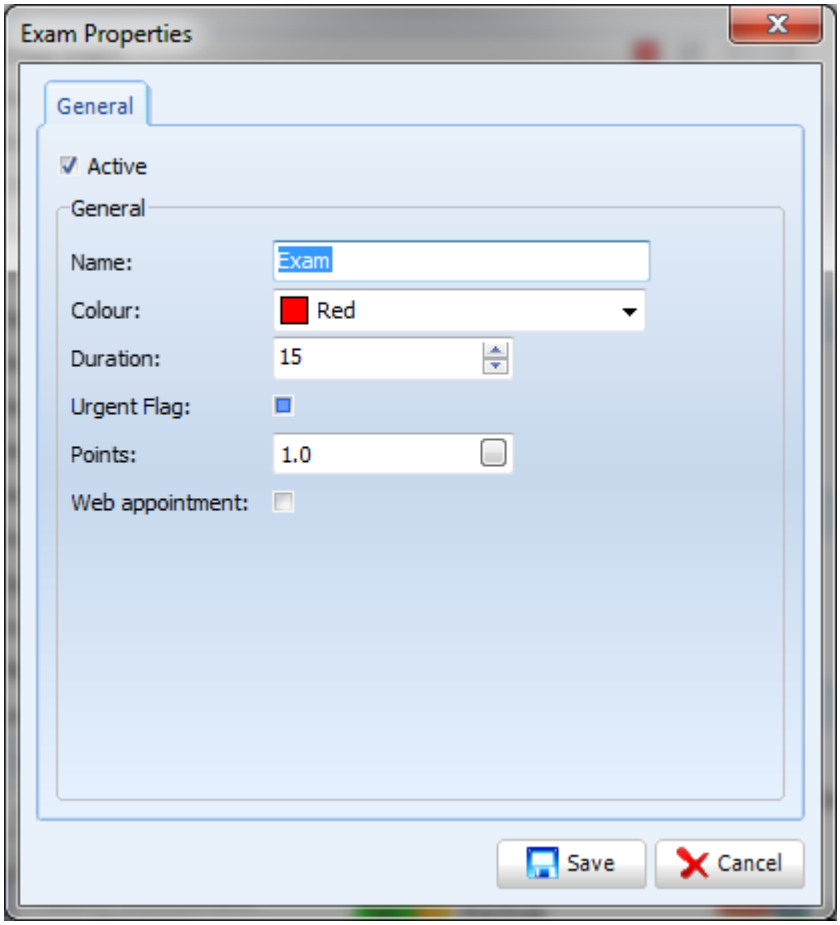


Now you are in Setup, click on the **Reasons** button which is situated on the Appointments heading.

A list of your appointment reasons will be displayed.

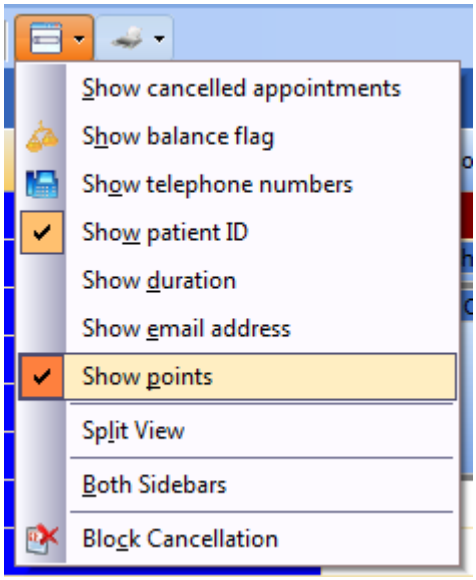


Select the appointment reason you wish to add a point value to. You can double click on the reason or click once then click **Edit**. The screen below appears.

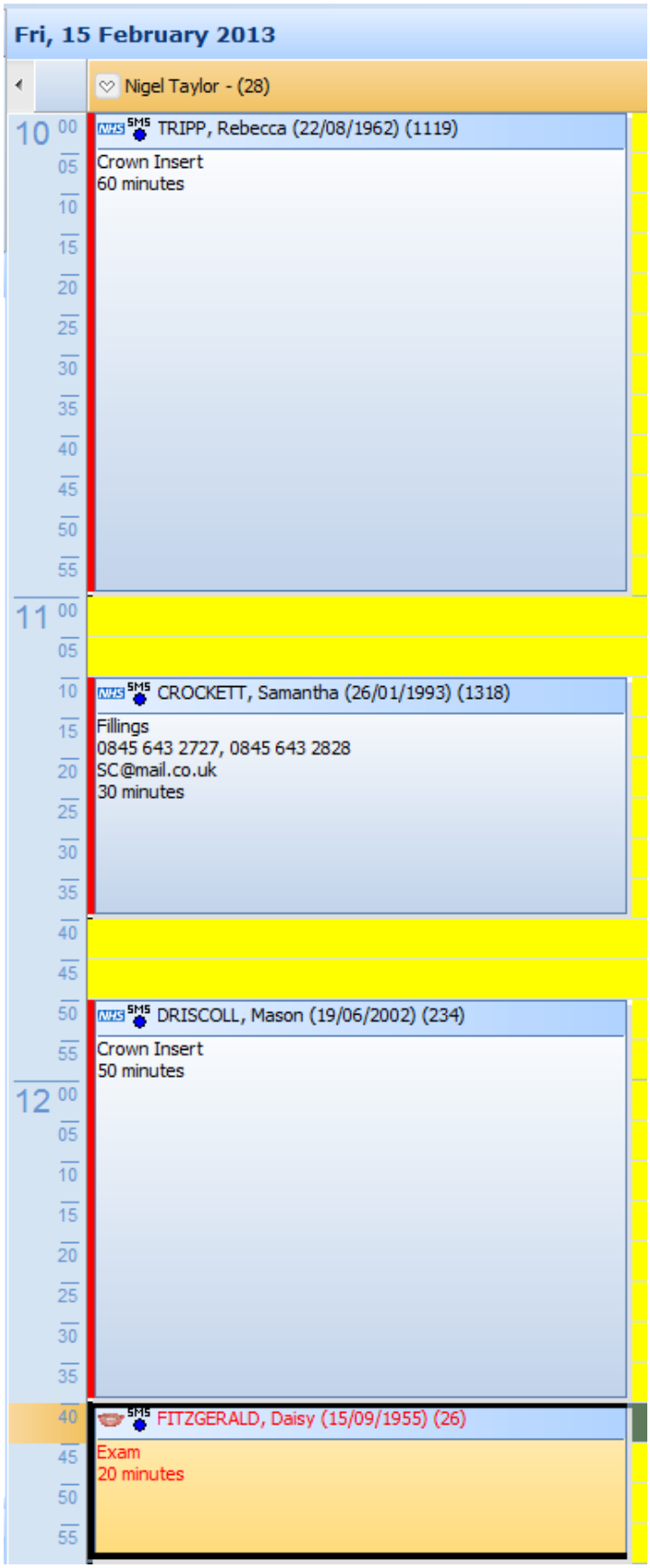


Enter the desired points into this window. For example, 1 for an exam, 3 for a filling, or 12 for a crown. Go through your list of appointments reasons and enter the appropriate points.

Now you have added points to your appointment reasons it is time to activate point scoring on your appointment book. To do this, first of all open the appointment book. Click on the Options button, and then select **Show points**.



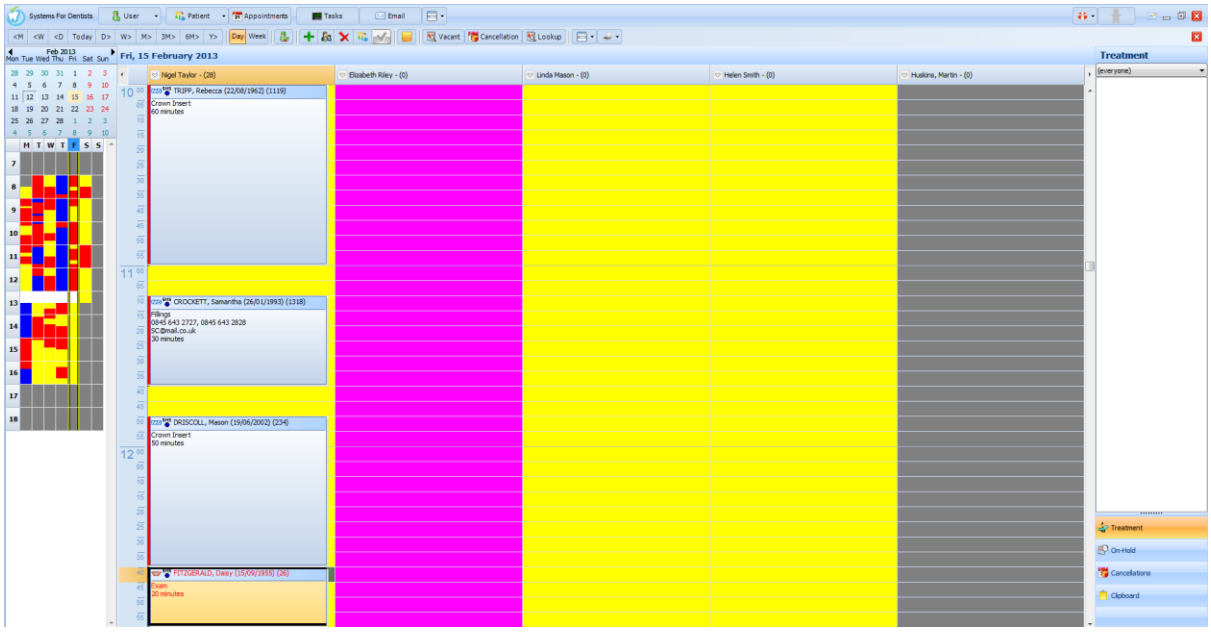
Now **Show points** is active you will notice next to the performer's name their points will be shown.



In this particular example Nigel Taylor has 28 points generated from his appointment reasons. This is a great way to see how many UDA's a dentist completes in a day at a glance.

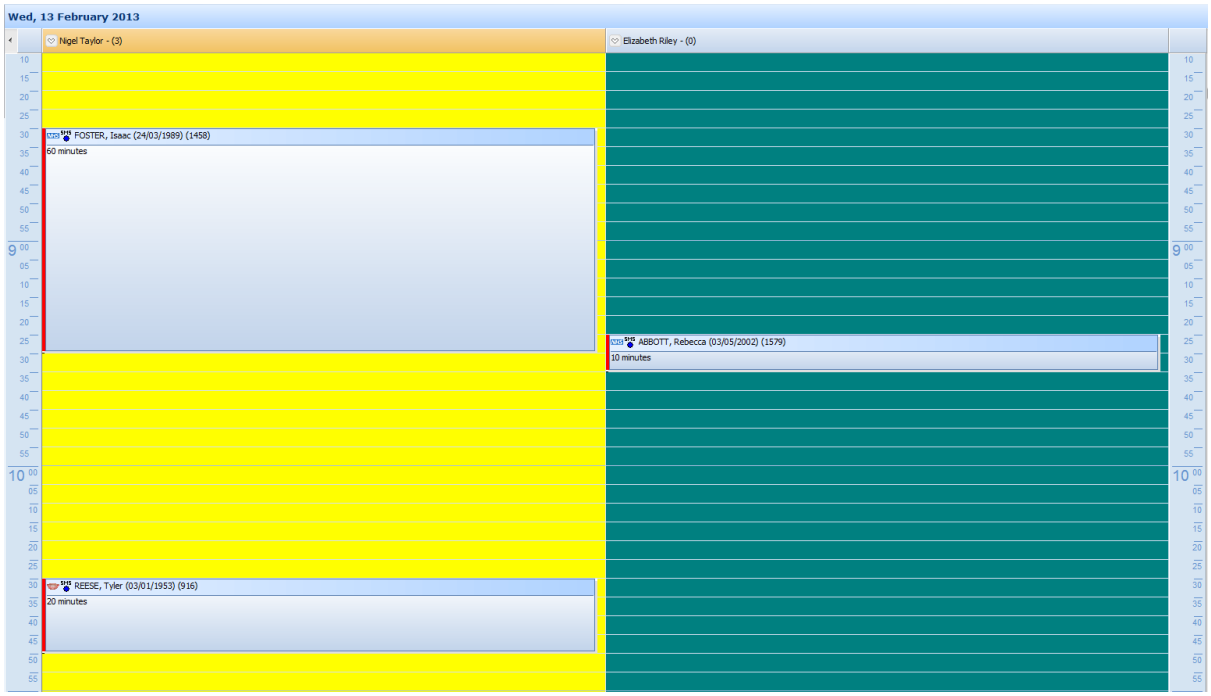
Split View

Enabling Split View allows you to have the overview accessible on the left hand side of the screen whilst looking through the Treatment, On Hold, Cancellation and Clipboard list on the right hand side. When split view is enabled your appointment screen will look similar to the example below.



Both sidebars

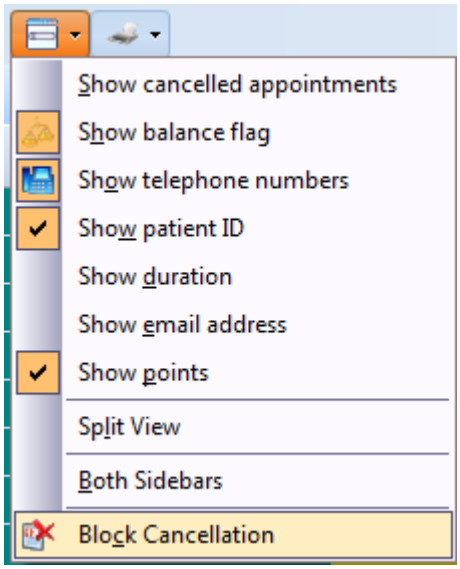
Enabling **Both sidebars** displays the time down both sides of the appointment book opposed to down the left hand side.



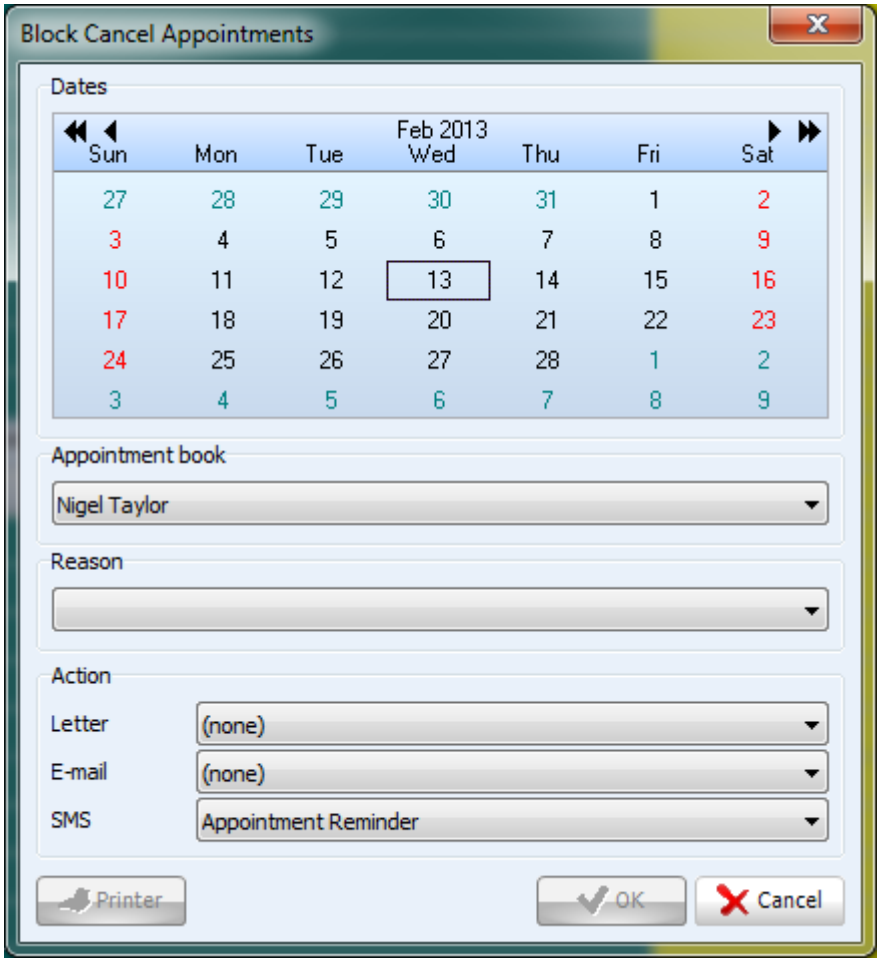
Block cancellation

The final option from this list is **Block cancellation**. This is used when a whole day or number of days of appointments need to be cancelled for a particular dentist.

Click on block cancellation from the **options** menu.



You will then be presented with the following screen.

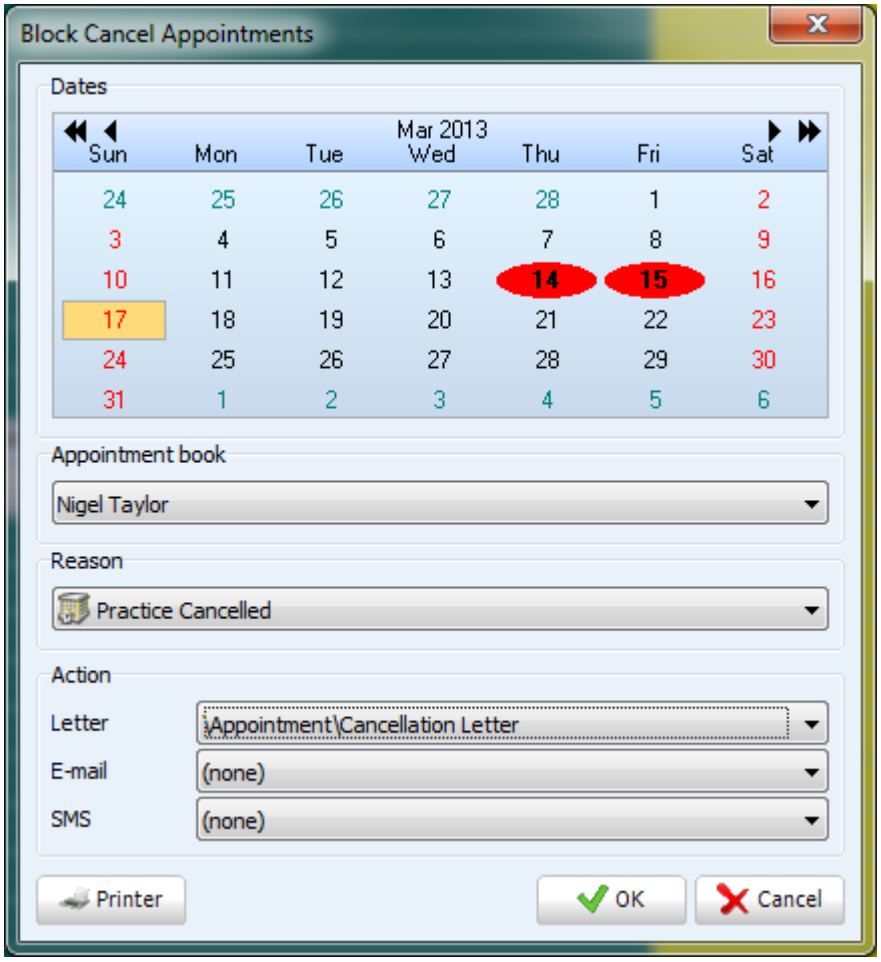


The current day will be squared (in this example the 13th February 2013). The first thing to do is to choose which performer you need to block cancel. Select the performer from the **Appointment book** dropdown list. You can then choose a reason for the cancellation from the **Reasons** dropdown list.

Navigate to the day(s) you wish to cancel appointments for by using the arrows at the top of the calendar.

The single arrows are to move forward or back a month and the double arrows for moving back or forward by year. Once you are at your desired date, click on the date to select it. Once selected, the date(s) appears as shown below.

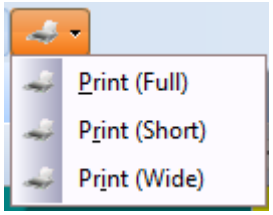
In the example above, the 14th and 15th of March 2013 have been selected. The final step is to select what action you wish to take. You have the selection from Letter, E-mail and SMS. By selecting any one of these actions every patient that had an appointment booked for that day will receive a cancellation documents in that means.



So in the example above all appointments on the 14th and 15th of March 2013 for Nigel Taylor have been cancelled and all patients that were due an appointment on these days are to receive a cancellation letter to confirm this. Click OK cancel the appointments.

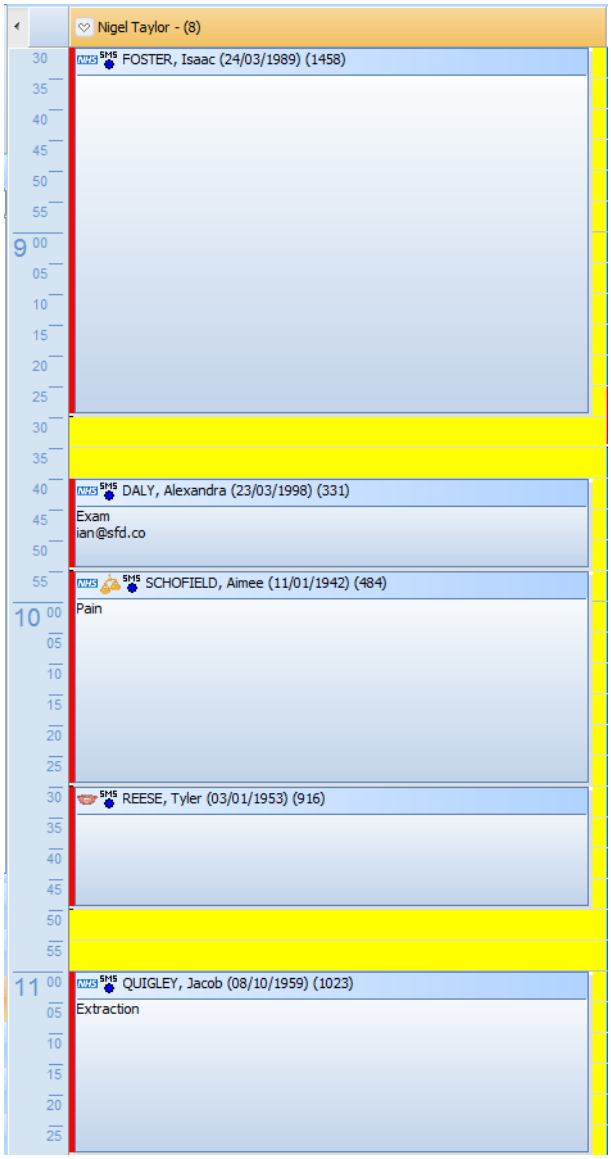
Print

By selecting the printer icon, you have the options to print day lists. There are three options available for printing a day list.



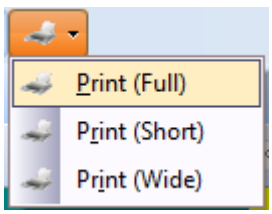
Print (Full)

The first option, **Print (Full)** presents the day list as you see it on the screen (in the example below 5 minute intervals).



To print this version of the day list, select the performer you wish to print a day list for by clicking on their name at the top of the appointment screen, once selected their name will display in orange.

In the example above we have selected Nigel Taylor. Now select the Print (Full) from the Print menu.



Once printed, your output will look similar to the example below.

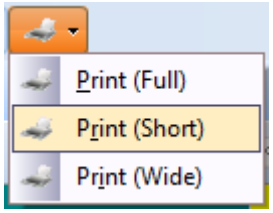
Taylor, Nigel - Wed, 13 February 2013

08:00						
08:05						
08:10						
08:15						
08:20						
08:25						
08:30	60	FOSTER, Isaac (24/03/1989)	1458			
08:35						
08:40						
08:45						
08:50						
08:55						
09:00						
09:05						
09:10						
09:15						
09:20						
09:25						
09:30						
09:35						
09:40	15	DALY, Alexandra (23/03/1998)	331	Exam		
09:45						
09:50						
09:55	35	SCHOFIELD, Aimee (11/01/1942)	484	Pain		
10:00						
10:05						
10:10						
10:15						
10:20						
10:25						
10:30	20	REESE, Tyler (03/01/1953)	916			
10:35						
10:40						
10:45						

Print (Short)

As the name of this day list would suggest this is a shortened version of the **Day list (Full).** This version of the day list shows each appointment in one row regardless of length.

To print, select the performer then click **Print (short)** from the print menu.



Below is an example of what a printed version of the Day list (short) looks like.

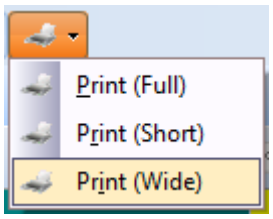
Taylor, Nigel - Wed, 13 February 2013

08:00	30	...					
08:30	60	FOSTER, Isaac (24/03/1989)	1458				
09:30	10	...					
09:40	15	DALY, Alexandra (23/03/1998)	331	Exam			
09:55	35	SCHOFIELD, Aimee (11/01/1942)	484	Pain			
10:30	20	REESE, Tyler (03/01/1953)	916				
10:50	10	...					
11:00	30	QUIGLEY, Jacob (08/10/1959)	1023	Extraction			
11:30	30	PAGE, Abby (27/08/1976)	175				
12:00	15	TAYLOR, Peter (14/12/1992)	563	Exam			
12:15	5	...					
12:20	40	PATTERSON, Freya (12/01/1928)	1844	Fillings			
13:00	45	...					
13:45	25	JORDAN, Peter (23/07/1943)	779				
14:10	15	...					
14:25	60	NASH, Caitlin (09/12/1964)	46	Bridge Insert			
15:25	5	...					
15:30	30	SAWYER, Daniel (04/01/1991)	1274	Fillings			
16:00	25	TODD, Alicia (28/09/1940)	1760				
16:25	35	ZIEGLER, Charlotte (20/01/1948)	1126	Lost Filling			

Print (Wide)

The final day list option is **Print (Wide).** This is displayed in a similar format to day list (short) but displays additional information at the end. Such information includes gender, patient balance symbol, scheme and the status of their SMS reminder.

To print, select the desired performer then click **Print (Wide)** from the print menu.



Here is an example of how the Day list (Wide) looks like once printed.

Taylor, Nigel - Wed, 13 February 2013

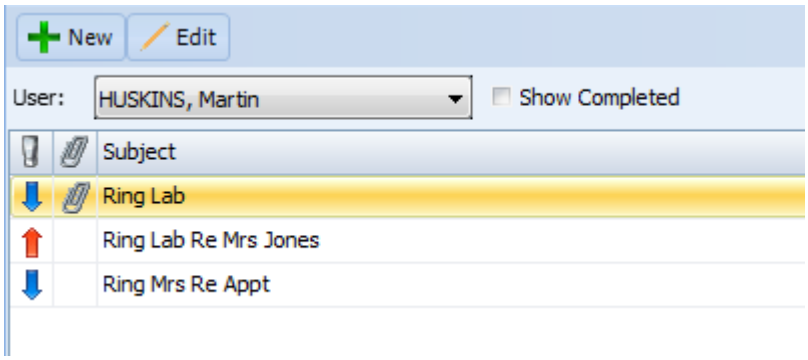
08:00	30	...					
08:30	60	FOSTER, Isaac (24/03/1989)	1458				
09:30	10	...					
09:40	15	DALY, Alexandra (23/03/1998)	331	Exam			
09:55	35	SCHOFIELD, Aimee (11/01/1942)	484	Pain			
10:30	20	REESE, Tyler (03/01/1953)	916				
10:50	10	...					
11:00	30	QUIGLEY, Jacob (08/10/1959)	1023	Extraction			
11:30	30	PAGE, Abby (27/08/1976)	175				
12:00	15	TAYLOR, Peter (14/12/1992)	563	Exam			
12:15	5	...					
12:20	40	PATTERSON, Freya (12/01/1928)	1844	Fillings			
13:00	45	...					
13:45	25	JORDAN, Peter (23/07/1943)	779				
14:10	15	...					
14:25	60	NASH, Caitlin (09/12/1964)	46	Bridge Insert			
15:25	5	...					
15:30	30	SAWYER, Daniel (04/01/1991)	1274	Fillings			
16:00	25	TODD, Alicia (28/09/1940)	1760				
16:25	35	ZIEGLER, Charlotte (20/01/1948)	1126	Lost Filling			

Tasks

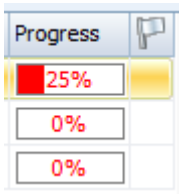
There are day to day tasks that need to be completed in and around the practice. SFD v6 has a dedicated section where you can create various tasks that can be updated with progress status. This section can be very helpful as it can act as a reminder system and be used to prioritise certain tasks as you have the progress feature.

To navigate to the Tasks screen, click on the **Tasks** button at the top of the screen.

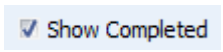
Now you are in the Tasks screen you will be able to see any existing tasks for a particular user.



In the far right you are able to view the status of certain tasks.

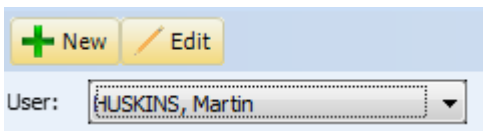


You can also view any completed task by ticking the Show Completed box.

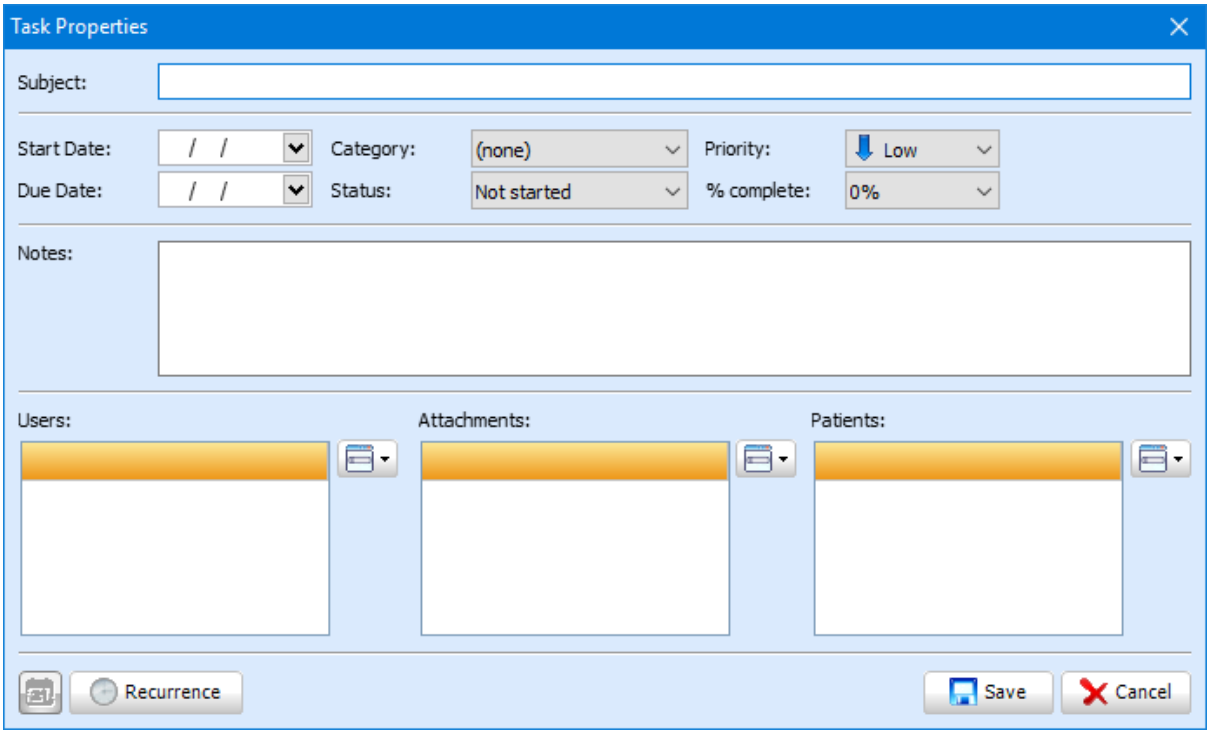


Create new

To create a new task, the first step is to select the user you wish to create a task for. Click the **New** button.

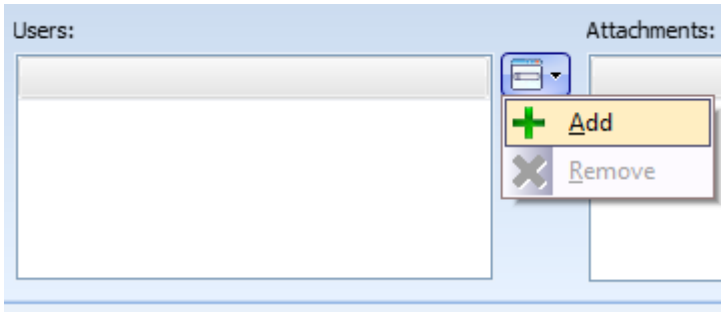


You will then be presented with the following window.

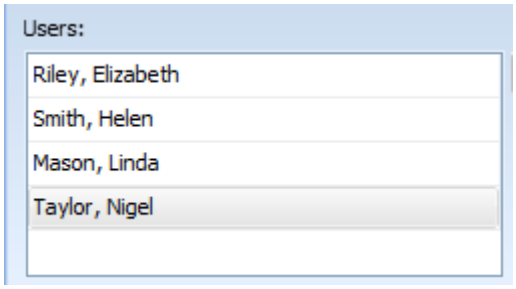


Firstly, enter the subject of the task. Next you can assign a start date, due date, status, % completion and priority. Enter these values by selecting them from the appropriate dropdown lists.

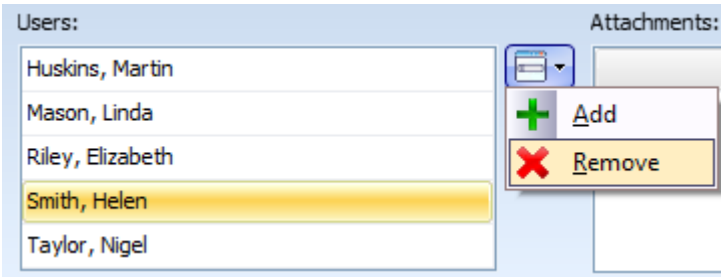
You can add any notes that you feel necessary into the notes field. At the bottom you have the ability to add users. To do this, click on the button to the right of the users' box.



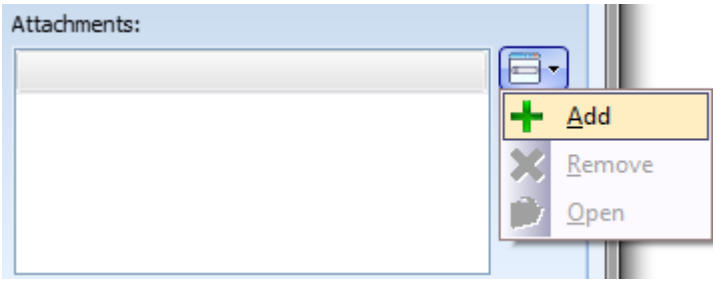
Once you click **Add**, you will be presented with a list of all performers. Select the desired user from the list by clicking on the name. Click **OK** to confirm. To add more than one user, repeat the previous steps. Once added the users will display in the users box.



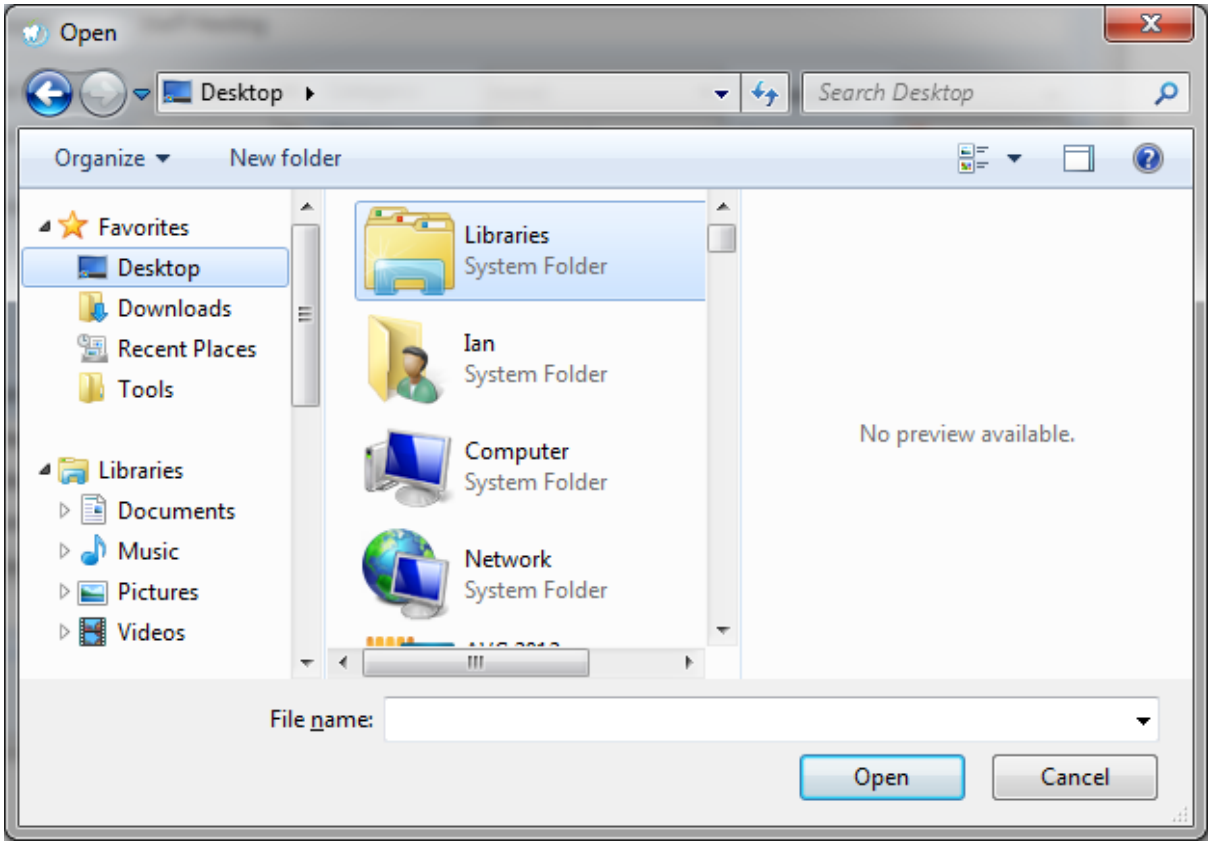
To remove a user, click on the user then click **Remove**.



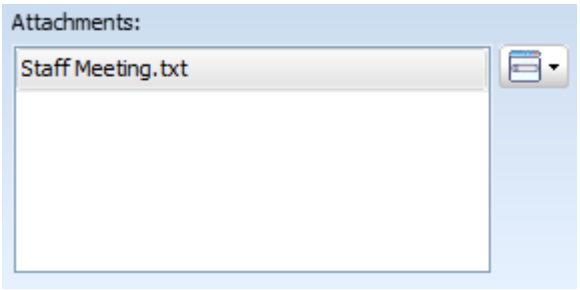
You can also add attachments to the task. To do this, click on the button to the right of the **Attachments** box.



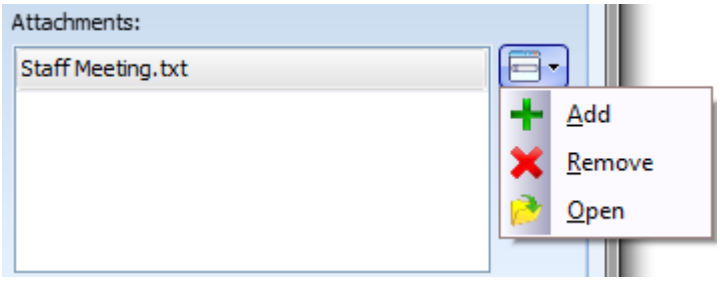
Once you click **Add** you will be presented with the following window.



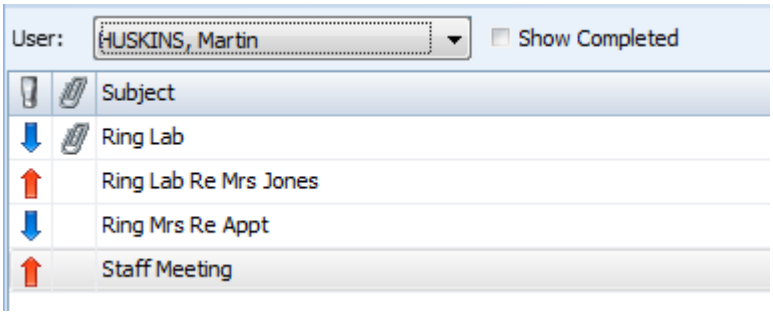
Navigate to the document you wish to attach then click **Open**. Once you have added the attachment it will be visible in the attachment box.



Once you have added the document you have the option to remove or open the attachment.

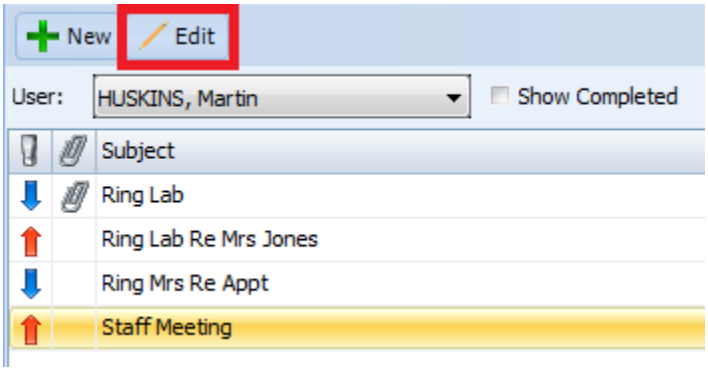


Click **Save** in the bottom right hand corner. The task created will now be visible in the main Tasks screen.



Edit existing

You have the ability to edit existing tasks, this is necessary so you can update the status and amend due dates if necessary. To do this, click on the task you wish to edit, and then click the **Edit** button at the top of the Tasks screen.



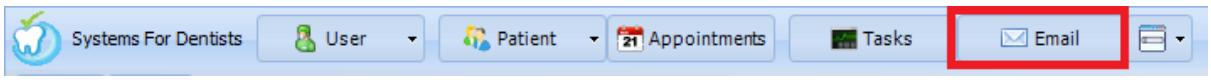
The **Tasks Properties** window will then appear. You can then make any necessary changes to the task. Click Save to update these changes.

Email

Overview

SFD v6 has a built in email service. This is useful for sending your patient's appointment reminders, recalls and any offers currently available at your practice etc. Refer the setup section of the manual to see how to enable email within your practice management software. ***Call support on, 0845 643 2727 for assistance.***

To access the main email screen, click on the **Email** button at the top of SFD.



You have access to all of the usual things you would expect from your regular email software. The main two tabs are **Outbox** and **Sent Items**. The Outbox contains emails that have been prepared and are waiting to be sent. You can click on an email from the list and in the bottom half of the screen you will see a preview of the contents of the email. The emails will process and will move into the Sent item section. To force the emails from the **Outbox** to **Sent Items**, click **Send / Receive** at the top of the screen.

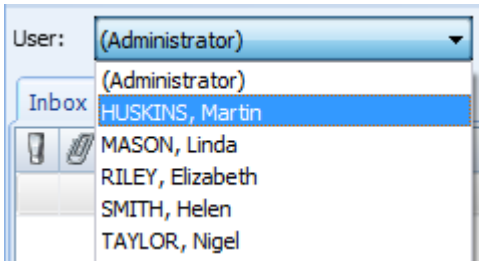
To remove any emails from the outbox that you don't wish to send, select the email from the list by left clicking on it then click **Delete** at the top of the screen.

Depending on your set up you may have an incoming server set up. If so, these emails will be visible In the **Inbox** tab.

Note that you don't have a create email option in this window. This is because emails are generated directly from a patient record or sent on a schedule, for example, appointment reminders.

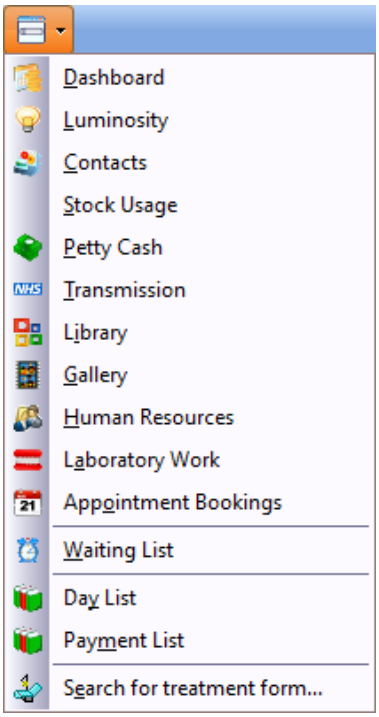
Selecting user

You have the ability to view email for different user of SFD v6. To select a user, select the desired one from the dropdown list near the top of the screen.



Options

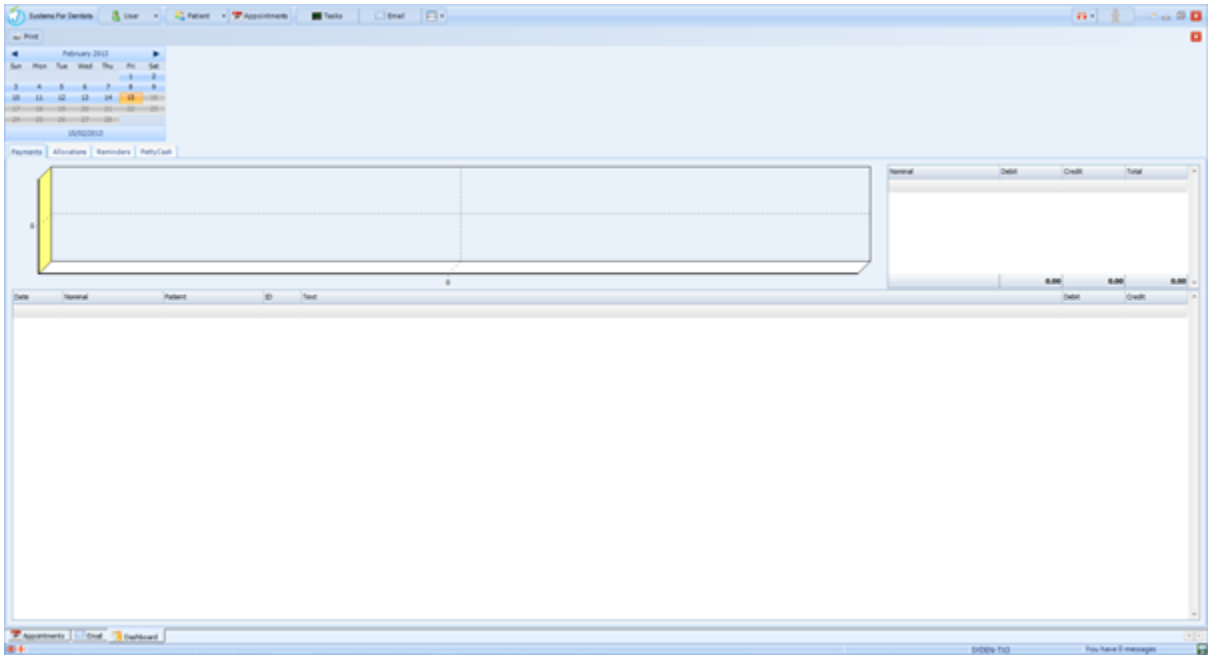
The final main button on the initial SFD v6 home screen is **Options**. The options button is on the far right hand side of the buttons we have already covered in the manual such as Users, Appointments and Email etc.



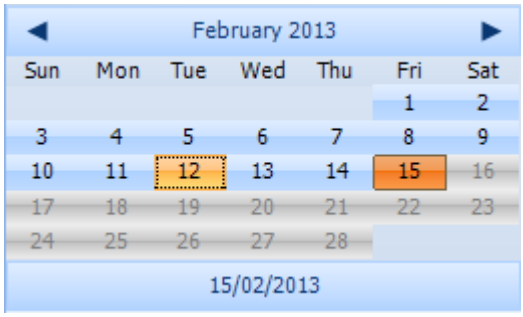
Dashboard

The dashboard is a very handy tool as it allows you to keep track of what has been processed within the system for a particular day. You can view payments, allocations, reminders and petty cash for a particular day. To access this feature select **Dashboard** from the options menu.

Once you have clicked **Dashboard** you will be presented with the following window.

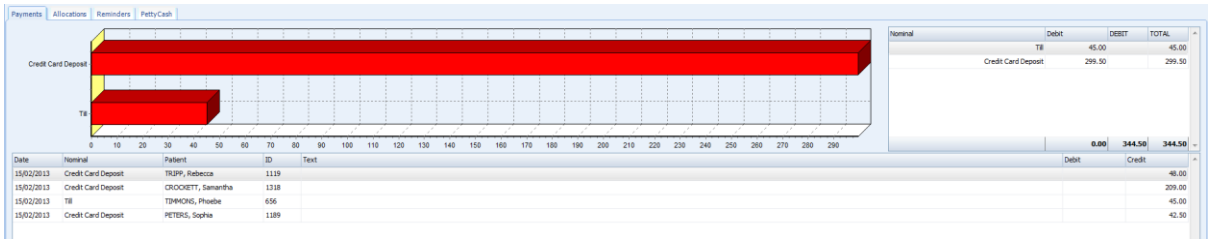


Select the day you wish to view information for by selecting the day from the calendar. When you open the dashboard you will automatically be presented with the current day's information (the date will be highlighted in dark orange). Once you have selected an alternative date it will be highlighted in a lighter shade of orange (example below).



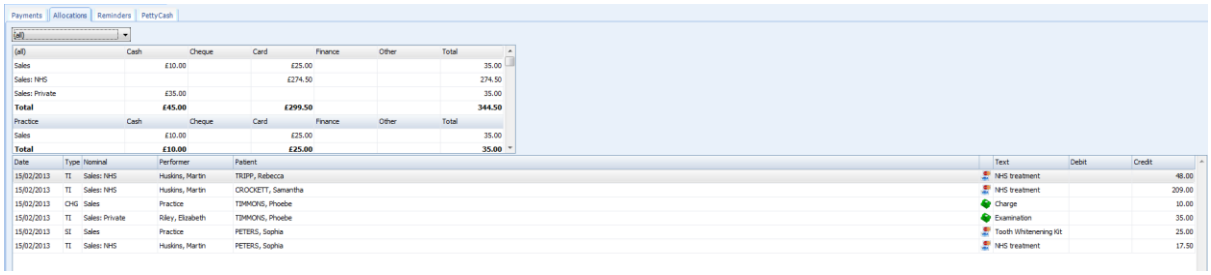
In the example above the current date is the 15th February, but the 12th February has been selected to view.

The first tab in the dashboard is **Payments**, this shows every patient taken on the day selected (example below).



You also have the graphic so you can easily determine the cash / cheque / card ratio. Each transaction is listed below the graphic. To the right of the graphic you are presented with totals for card, cash and cheque, which then contribute to the grand total displayed at the bottom of this area.

The next tab is **Allocations**. This shows the money allocated to the particular day selected.



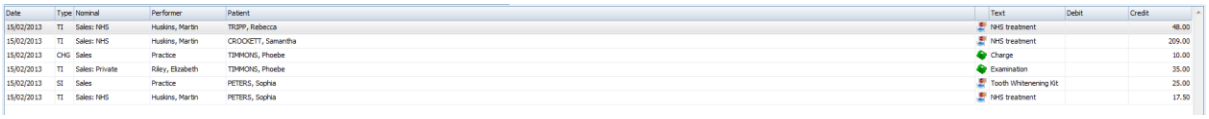
In this tab you have the ability to select a specific performer or the practice, select from the drop down list.

The dropdown list will only display those that have allocations for the selected day.

At the top you have a summary of allocations. This displays totals of which scheme money is allocated and by which means (cash, card, cheque, finance or other).

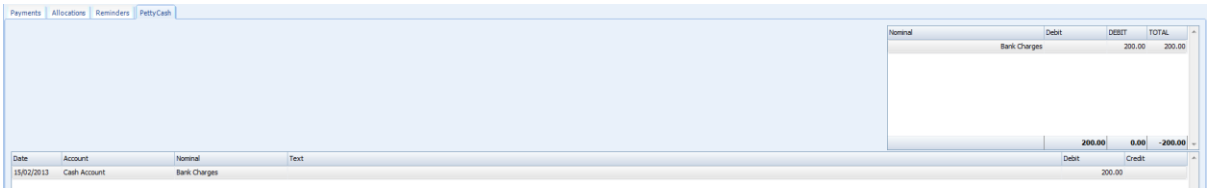
(all)	Cash	Cheque	Card	Finance	Other	Total
Sales	£10.00		£25.00			35.00
Sales: NHS			£274.50			274.50
Sales: Private	£35.00					35.00
Total	**£45.00**		**£299.50**			**344.50**
Practice	Cash	Cheque	Card	Finance	Other	Total
Sales	£10.00		£25.00			35.00
Total	**£10.00**		**£25.00**			**35.00**

Below you have a list of all allocations for the day selected.



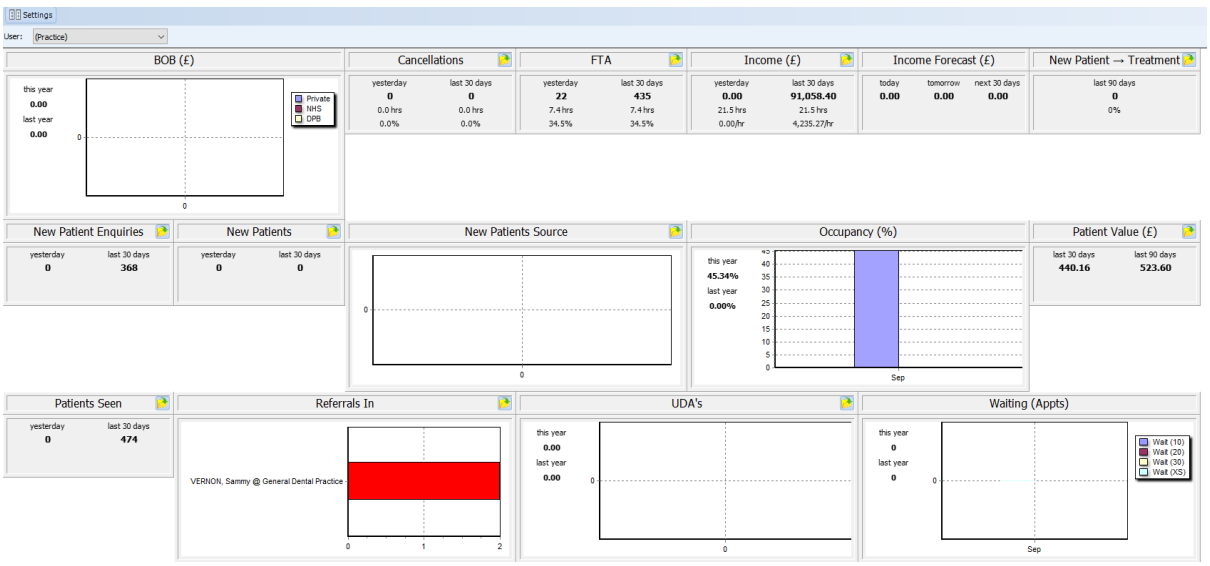
The next tab is **Reminders.** This shows the status of email appointment reminders.

Finally you have the **Petty Cash** tab. This allows you to keep track of any changes to the petty cash throughout the select day.



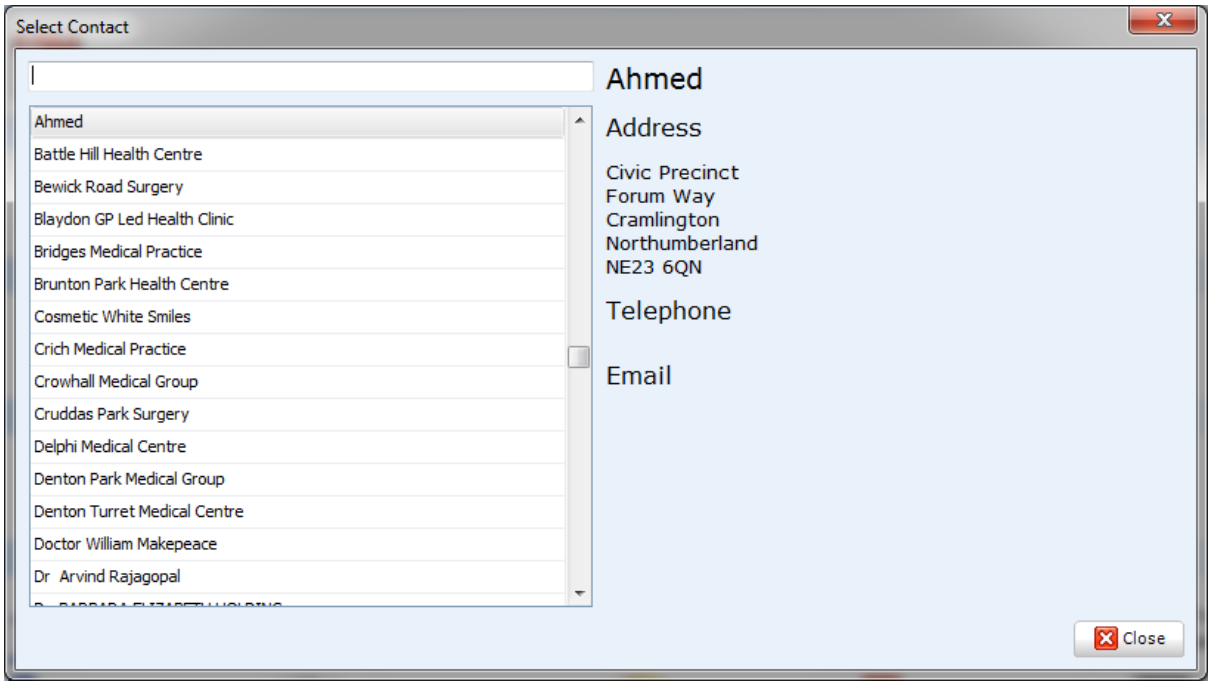
Luminosity

The **Luminosity** report shows practice performance information such as number of new patients, occupancy and income. The results can be filtered based on a performer by selecting a user at the top left. The ordering and visibility of reports can be changed by clicking **Settings**.



Contacts

The next feature from the options menu is **Contacts**. This includes any general contacts, laboratories, suppliers or GP's you have added to the system in the Setup section of the program. Once you click **Contacts** from the options menu, the following window appears.



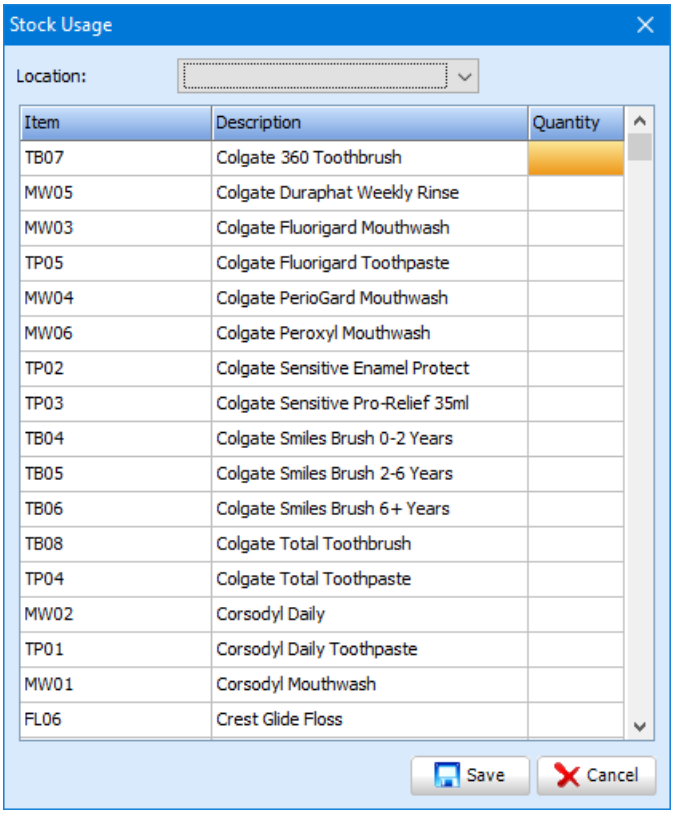
You can use the search bar at the top of this window to search for a particular contact, or alternatively navigate to the contact using the scroll bar on the side. Within the Groups dropdown list you have the ability to search for certain types of contacts, click on the group you wish to see, and the contacts which are in that particular group will be listed. To create a new group go to the Contacts setup section of the manual.

Once selected, their contact information will be shown on the right hand side of this window.

Stock Usage

Stock Usage allows you to keep track of quantities of certain items of stock used within the practice. When you use a certain amount of stock items you can add the quantity to this feature and it will deduct the amount from your stock level, which is entered in the **Accounts (Full)** section of the program.

Once you have selected Stock Usage from the options menu you will be presented with the following window.

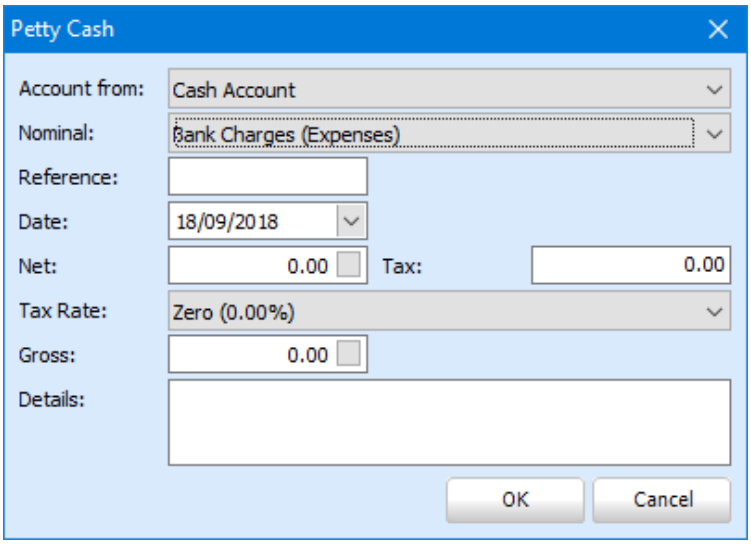


Click on the stock item you wish to deduct a quantity from by clicking on it from the list. Click on the quantity column to enter a value. After entering a value the text will turn bold.

Click **Save** in the bottom right hand corner of the window and this value will be deducted from the stock level.

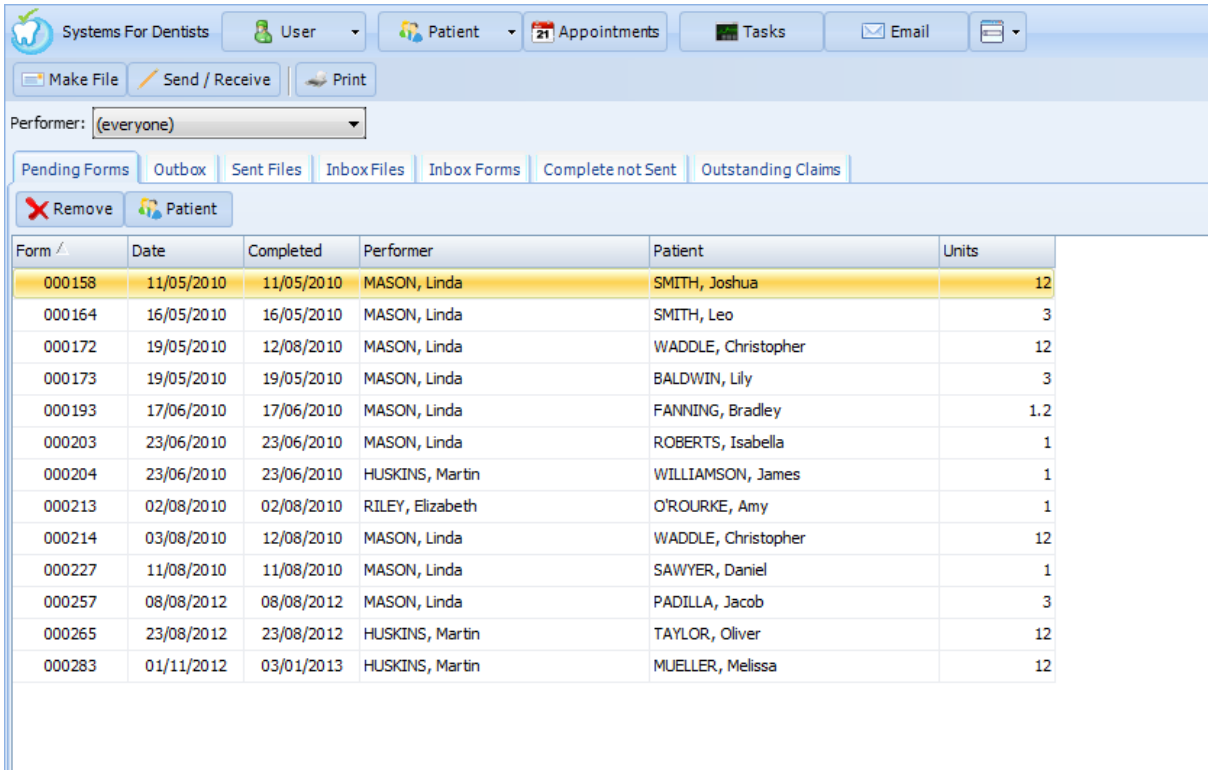
Petty Cash

The Petty Cash feature allows you to set up petty cash details for your practice. Enter the appropriate values into the window shown below.



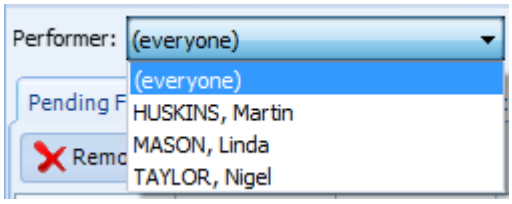
Transmissions

Select **Transmissions** from the options menu.



Form	Date	Completed	Performer	Patient	Units
000158	11/05/2010	11/05/2010	MASON, Linda	SMITH, Joshua	12
000164	16/05/2010	16/05/2010	MASON, Linda	SMITH, Leo	3
000172	19/05/2010	12/08/2010	MASON, Linda	WADDLE, Christopher	12
000173	19/05/2010	19/05/2010	MASON, Linda	BALDWIN, Lily	3
000193	17/06/2010	17/06/2010	MASON, Linda	FANNING, Bradley	1.2
000203	23/06/2010	23/06/2010	MASON, Linda	ROBERTS, Isabella	1
000204	23/06/2010	23/06/2010	HUSKINS, Martin	WILLIAMSON, James	1
000213	02/08/2010	02/08/2010	RILEY, Elizabeth	O'ROURKE, Amy	1
000214	03/08/2010	12/08/2010	MASON, Linda	WADDLE, Christopher	12
000227	11/08/2010	11/08/2010	MASON, Linda	SAWYER, Daniel	1
000257	08/08/2012	08/08/2012	MASON, Linda	PADILLA, Jacob	3
000265	23/08/2012	23/08/2012	HUSKINS, Martin	TAYLOR, Oliver	12
000283	01/11/2012	03/01/2013	HUSKINS, Martin	MUELLER, Melissa	12

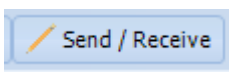
By default the transmission screen opens in the **Pending Forms** tabs. These are all forms that have been completed and had the Transmit button clicked within the form. These are sat in Pending until we click **Make File**. Whilst forms are in the pending tab, you are able to remove single forms before they are transmitted. Select the form from the list by clicking on it, and then click the **Remove** button at the top of the screen. You can also filter the forms by performer, by selecting from the performer dropdown list.



After checking your pending forms, the next step is to make a file. To do this, click Make File at the top of the screen.

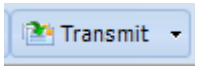
This will then bundle all pending form into a file. The forms at this point the forms have moved from the **Pending Forms** tab to the **Outbox** tab.

Now that the File has been made and is in the **Outbox** tab this is ready to be sent to the board. To do this, click the **Send/ Receive** button at the top of the transmissions screen.



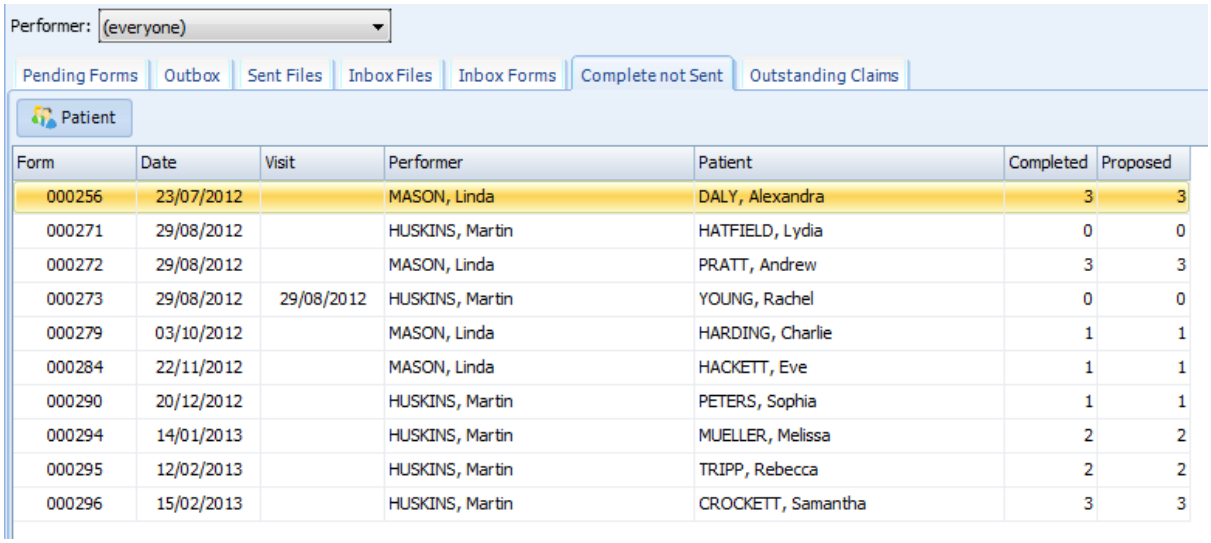
This will then move the file into **Sent Files.** By clicking on **Send / Receive** this will also bring any responses from the board into the **Inbox Files** tab. You will be able to see from this tab if any forms have been rejected and if so, why. You can then go to the next tab is which is named Inbox **Forms** a search for the forms that have been rejected. Double click on the form and make any amendments necessary.

Once you are finished, click on **Transmit**.



The form will now be in the **Pending Forms** tab of the transmissions screen ready to retransmit.

The next tab to make note of in the transmissions screen is **Complete not Sent.**



Form	Date	Visit	Performer	Patient	Completed	Proposed
000256	23/07/2012		MASON, Linda	DALY, Alexandra	3	3
000271	29/08/2012		HUSKINS, Martin	HATFIELD, Lydia	0	0
000272	29/08/2012		MASON, Linda	PRATT, Andrew	3	3
000273	29/08/2012	29/08/2012	HUSKINS, Martin	YOUNG, Rachel	0	0
000279	03/10/2012		MASON, Linda	HARDING, Charlie	1	1
000284	22/11/2012		MASON, Linda	HACKETT, Eve	1	1
000290	20/12/2012		HUSKINS, Martin	PETERS, Sophia	1	1
000294	14/01/2013		HUSKINS, Martin	MUELLER, Melissa	2	2
000295	12/02/2013		HUSKINS, Martin	TRIPP, Rebecca	2	2
000296	15/02/2013		HUSKINS, Martin	CROCKETT, Samantha	3	3

This tab includes forms which every treatment item has been completed but this form is yet to be transmitted, therefore hasn't reached the **Pending Forms** tab. Open the form by double clicking on it from The **Complete not Sent** tab. Now you have opened the form, click on the **Transmit** button.

The final tab is the **Outstanding Claims** tab, this tab will display all open claims. You will notice the claims will be displayed in white, orange or red.

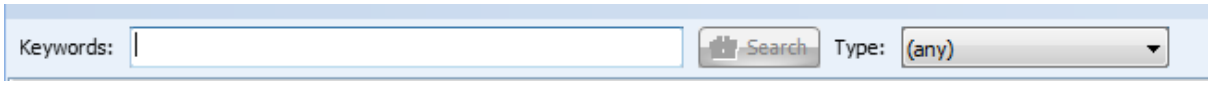
542747	19/04/2012	19/04/2012	LAD, Priya	WATERSON, Keith	2	3
542768	23/04/2012	23/04/2012	MALVIYA, Parul	LARNER, Martin	1	2
542769	23/04/2012	21/01/2011	BEGUM, Rabia	LYNCH, Kevin	0	0
542771	23/04/2012	23/04/2012	MALVIYA, Parul	DUELL, Michael	1	2
542785	24/04/2012	24/04/2012	BEGUM, Rabia	WILSON, Pauline	0	1
542786	24/04/2012	24/04/2012	LAD, Priya	BARNES, Joseph	1	3
542790	24/04/2012	24/04/2012	LAD, Priya	ADAMSON, John	1	2
542792	24/04/2012	24/04/2012	BEGUM, Rabia	COLTHART, Micheal	1	2
542793	24/04/2012	24/04/2012	BEGUM, Rabia	HICKS, Stuart	0	1
542795	24/04/2012	24/04/2012	BEGUM, Rabia	FORBES, John	0	1
542799	05/05/2012		AL TAHAN, Basma	TEST, Testing	2	2
542800	08/05/2012		DORAN, Jacqueline	DORAN, John	0	0
542803	21/05/2012	08/11/2010	SIDHU, Preet	TREWICK, Madeleine	1	2
542814	28/05/2012		DORAN, Jacqueline	BRAVO, Johnny	2	2
542816	29/05/2012		MALVIYA, Parul	GRIFFIN, Peter	2	2
542817	29/05/2012		LAD, Priya	VERNON, Martin	1	2
542820	06/06/2012		DORAN, Jacqueline	JUROWSKI, Ryszard	3	3

The colour system is a good indicator and can help you prioritise certain claims. If the form number is displayed in white, it has been 0-14 days since the patient last visited. If orange, it has been 14-21 days and if red, it has been anytime time over 21 days. Therefore anything in red, as a practice you should be looking to complete these forms as soon as possible.

So this feature offers a very quick view of all your outstanding claims, therefore helping you monitor any potential FTA claims.

Library

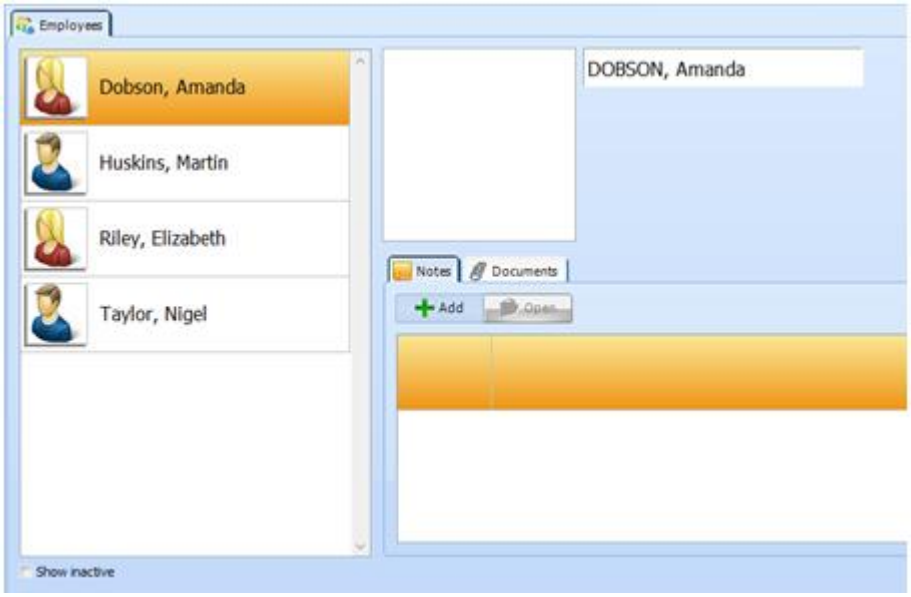
The **Library** is a feature for storing documents. To add documents to your library refer to the setup section of the manual. Once selecting library from the options menu you will be presented with the following window.



You can then search for any documents via keywords and by type.

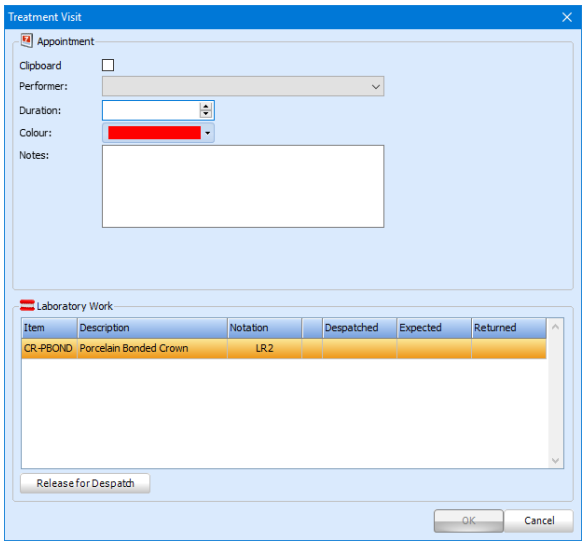
Human Resources

The Human Resources section allows you to store documents and notes against all active users within the system. Click between **Notes** and **Documents** when viewing an employee then click **Add**.

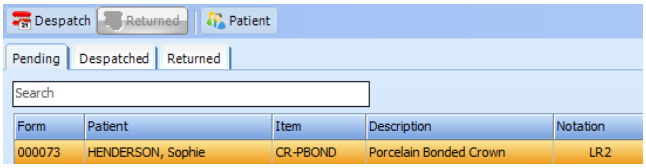


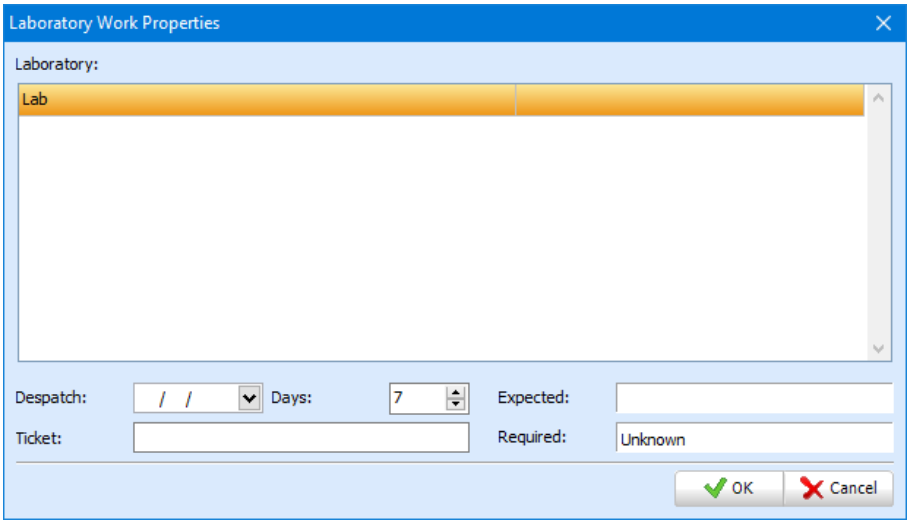
Laboratory Work

On a treatment form, ensure the item you wish to dispatch to a laboratory has been marked as **Charged** then double click the appointment (Appointment 1 etc). This will show the below screen where you can mark it as **Released for Dispatch.**



When selecting **Laboratory Work** from the menu at the top, there is a list of all pending items. Click **Despatch** which will then show the **Laboratory Work Properties** screen where you can select the despatch date, ticket number and expected return date. Once **OK** has been selected, the item will move to the **Despatched** screen.

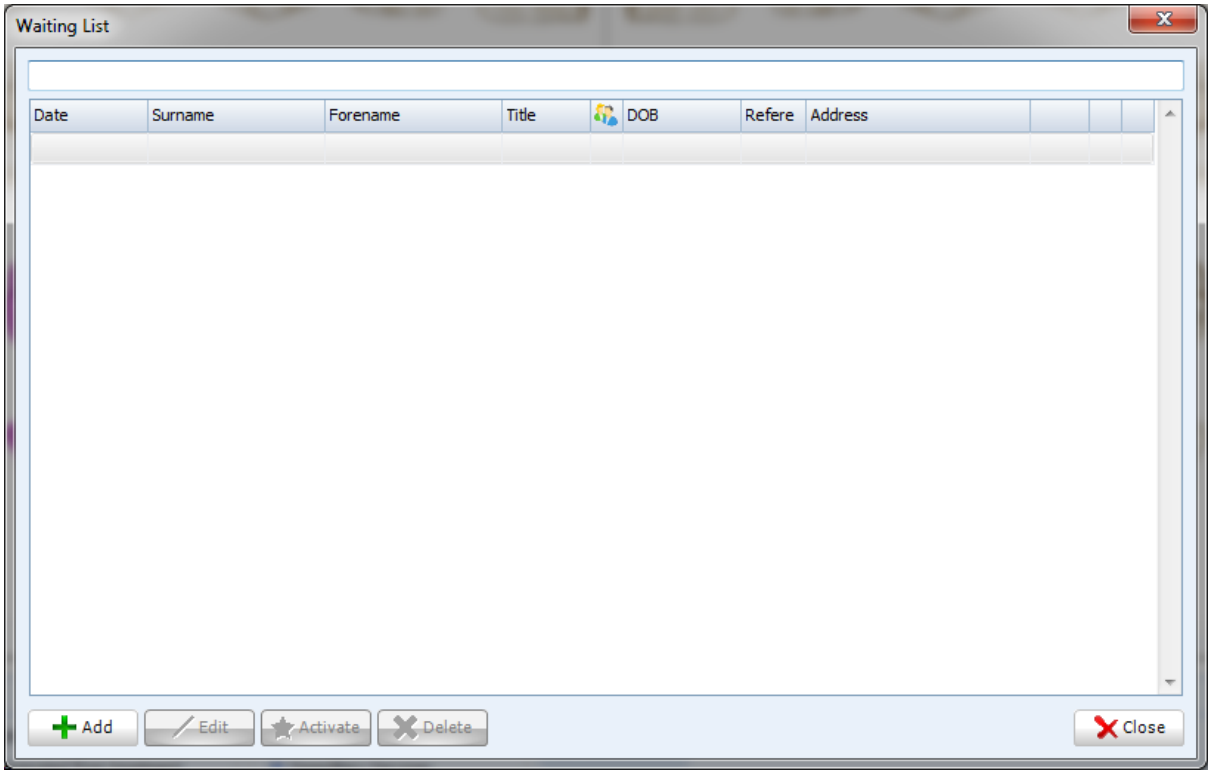




When the item has been returned, open the **Despatched** tab which will list the item you are looking for. Select it then click **Returned**.

Waiting List

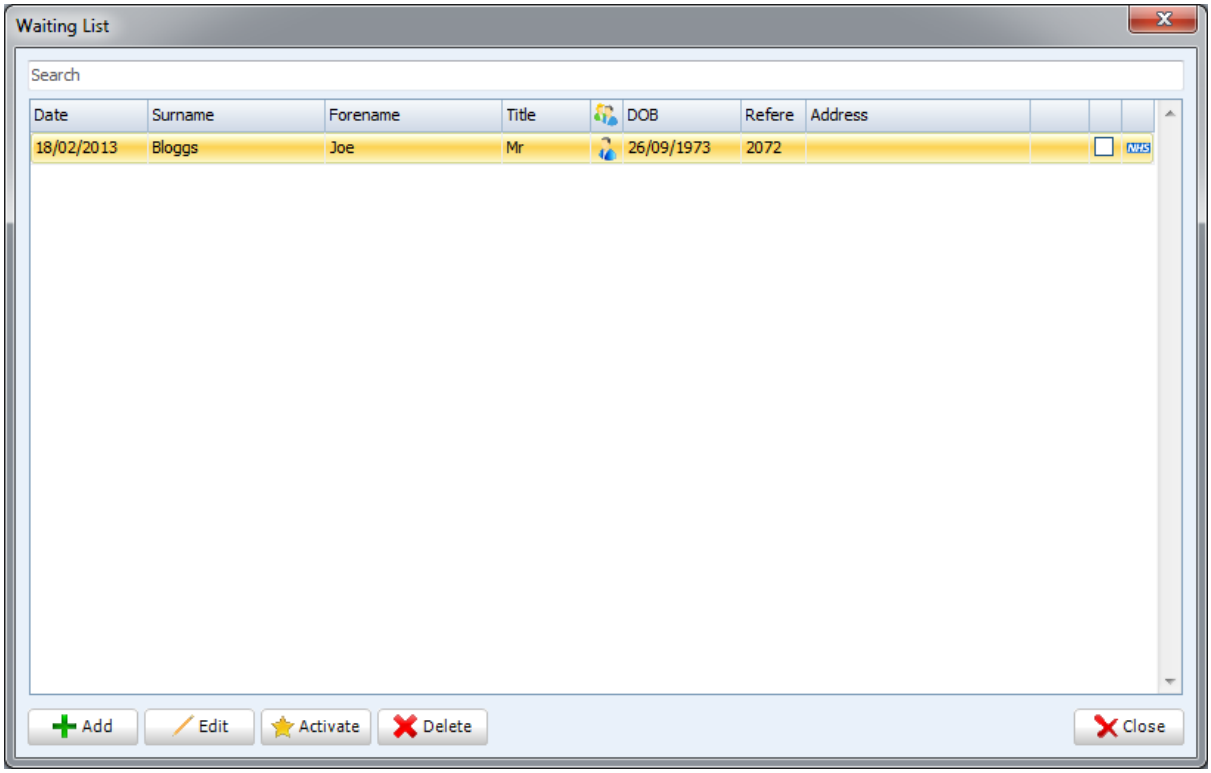
This feature allows you to store patients that are waiting to join the practice. The following window appears once you have selected **Waiting List** from the options menu.



From this screen you are able to view any existing patients that have been added to the waiting list. You can search for patients using the top search bar. To add a patient to the waiting list, click **Add** in the bottom left hand corner.

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

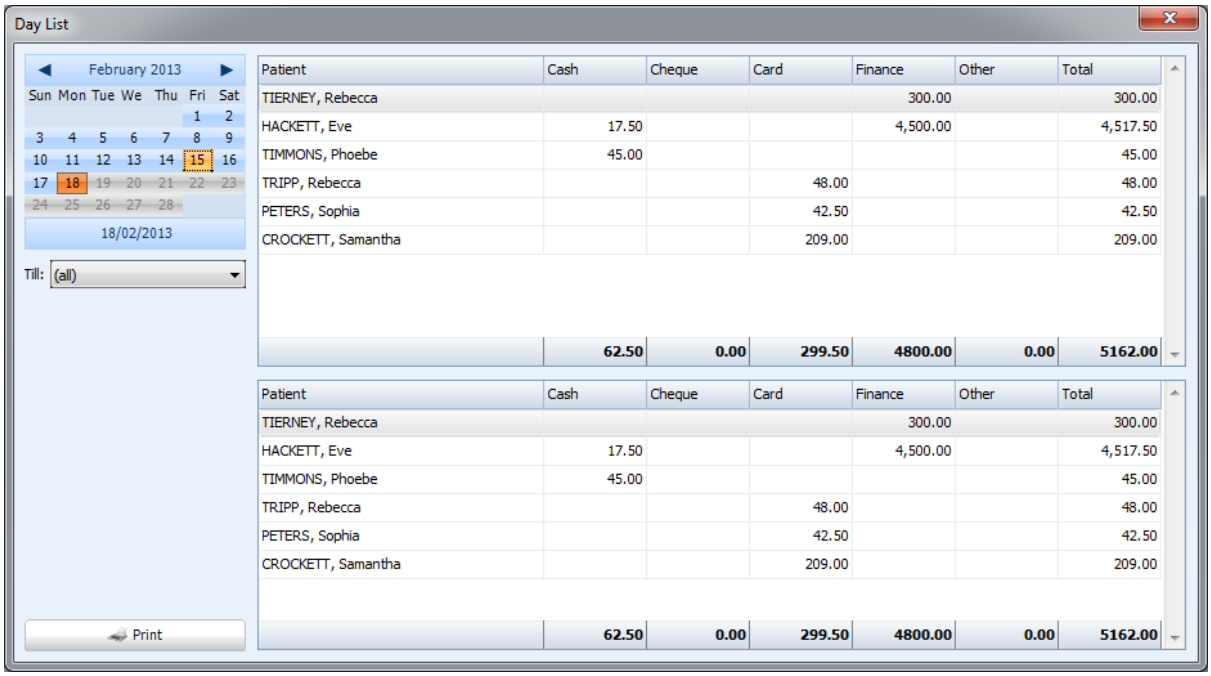
Enter the relevant information then click **Save**, in bottom right hand corner. The patient will now be stored in the waiting list.



Click **Edit** if you're required to change any of the patient's properties. Click **Activate** if you wish to add them to your active patient list. **Delete**, will remove the patient from the waiting list and the system completely.

Day List

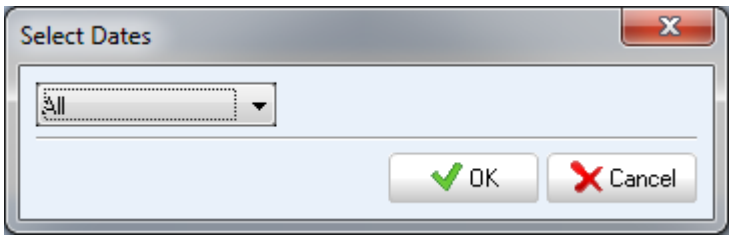
The next option is **Day List**. This allows you to view all transactions made on a particular day.



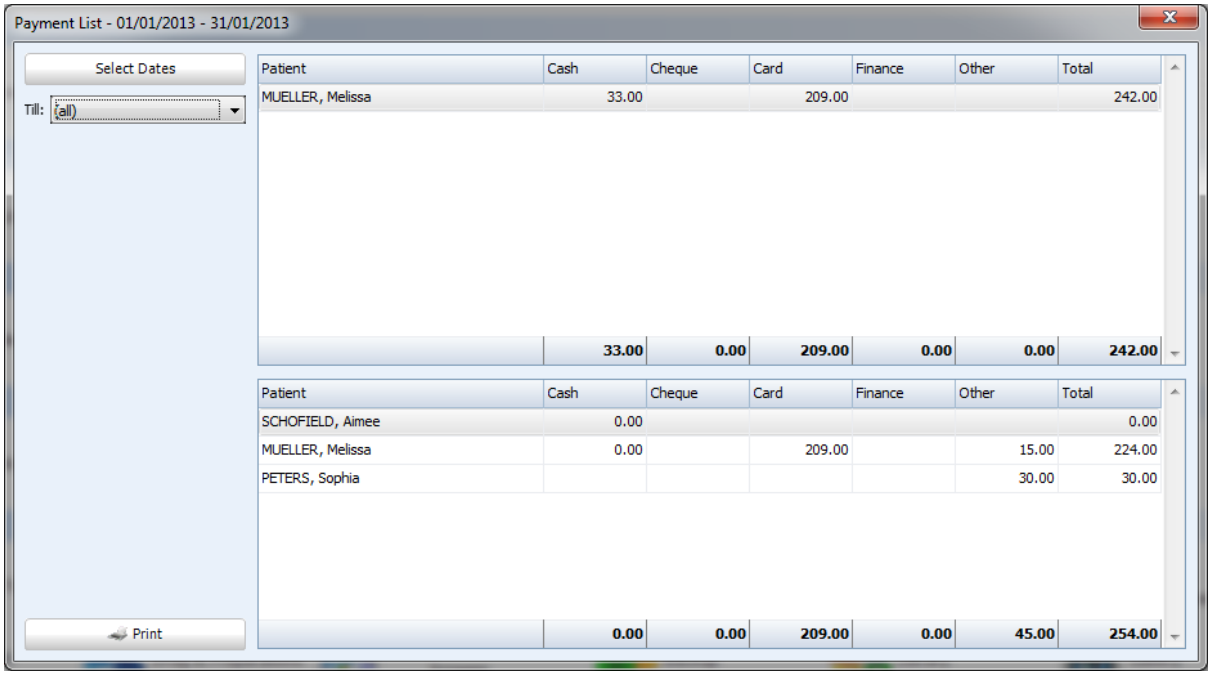
Select the day you wish to view by selecting a day from the calendar in the top left hand corner. You can then sort by till by using the dropdown below the calendar. This information is also printable; click **Print** to do so.

Payment List

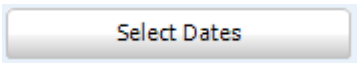
This option provides the same information as **Day List** apart from the fact you can bring up information for specific time periods rather than a single day. After clicking on Payment List from the options menu you will be presented with the window below.



Select your date range from the dropdown list. You will then be presented with the following window.

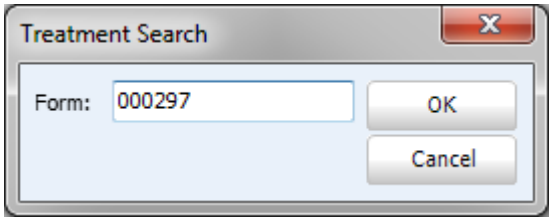


To select a different date range, click on **Select Dates** in the top left hand corner.

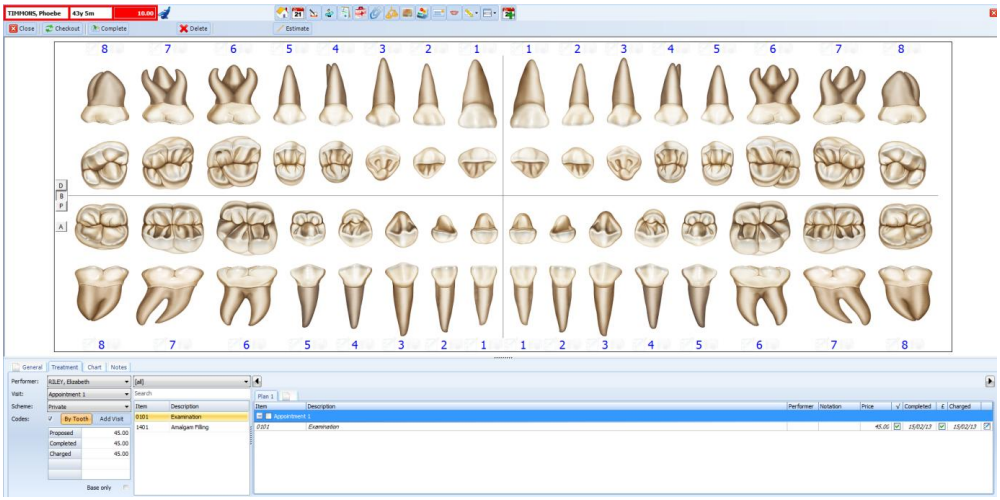


Search for a treatment form

This option is used for searching for a specific form by its form number. After selecting this from the options menu you will be presented with the following window.



Click **OK**, the form you have searched for will now open on screen.

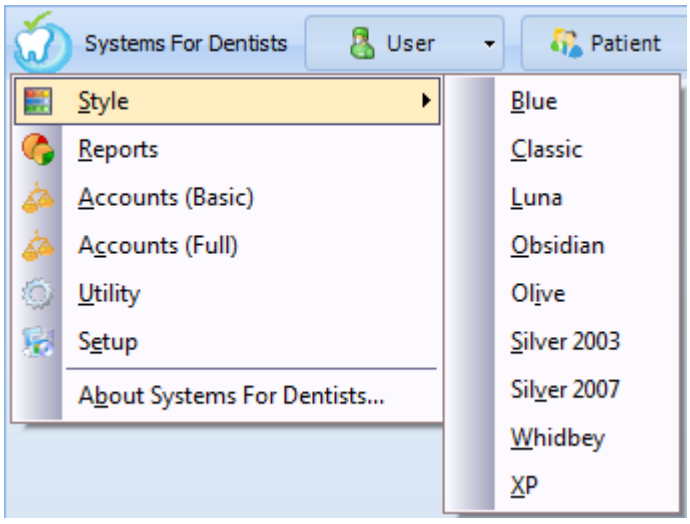


Style

SFD v6 offers a number of styles that you can select. These styles change the appearance of our dental practice management software. Each style has a different colour scheme associated with it.

To change the style of SFD v6 on your PC follow the steps below.

First of all click on the **Tooth icon at the top left**. A dropdown list appears, from this menu the top option is **Style**.



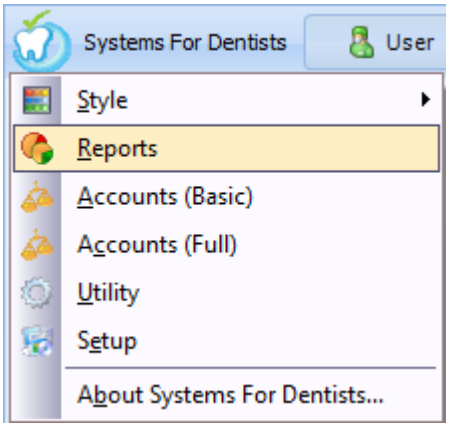
To change the style, click on an option from the list.

Reports

Introduction

Our advanced reporting system makes it easy to get information, quickly. Whether this is information regarding patient attendance behaviour or even how much money was allocated in a certain period of time. This chapter of the manual will guide through each and every report so you can better your understanding of what information you can generate.

To access the reporting screen, click on the **Tooth** icon at the top left hand corner, and then select **Reports**.



Appointment

Reminders

This report is used for creating appointment reminders for certain time periods. To access this report, click on the **Reminders** button in the reporting screen.

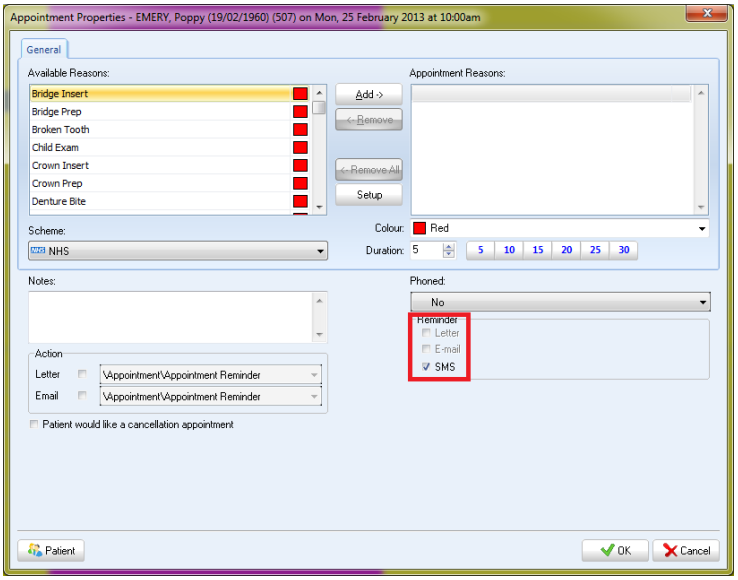
Once you have clicked on the **Reminders** button, click **Report** at the top left hand corner of the screen.

You will then be presented with the following window.

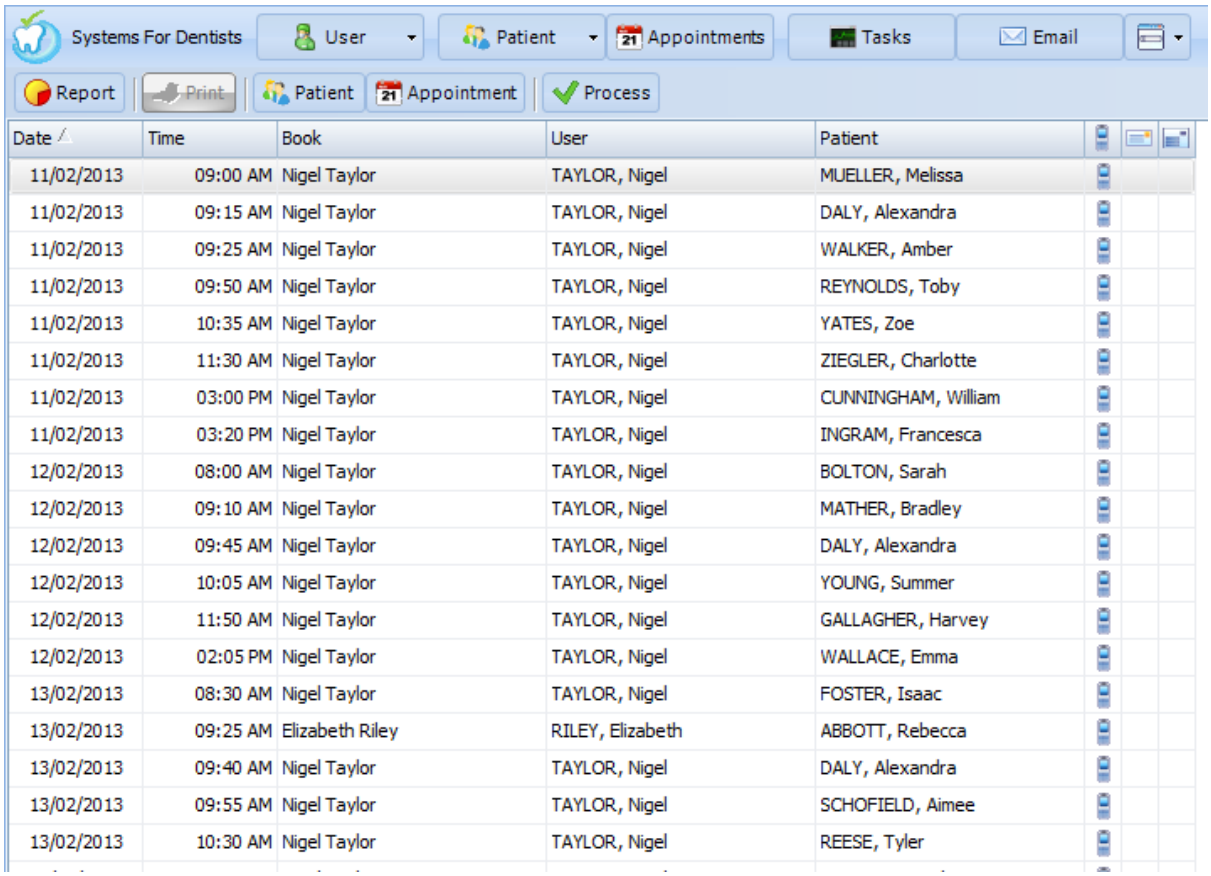
From this window you can select which performer's patients you wish to include in the report. If you only wish to bring up certain performer click **Selected** then remove any ticks next to the performers you don't wish to include in the report.

Select the time period of appointments you wish to generate a report for by using the **Dates** dropdown list.

Next, select the **Type**. This is the type of appointment reminder that was originally selected in the Appointment Properties screen when booking the appointment.

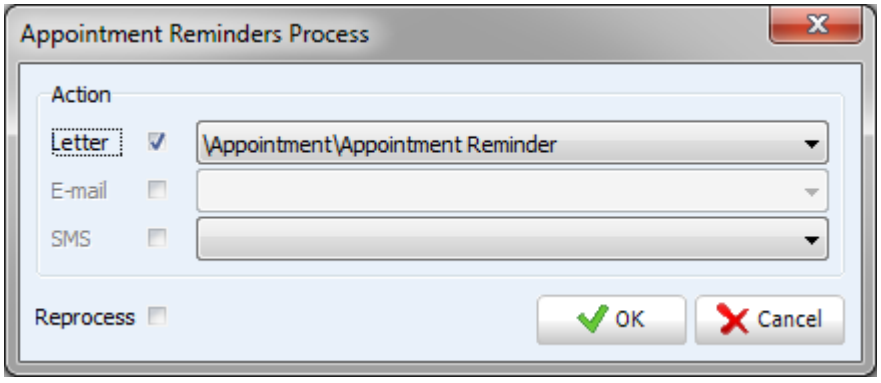


Once you have entered the values, click **OK** in the bottom right of the screen. Your list of patients will now have generated.



Date	Time	Book	User	Patient
11/02/2013	09:00 AM	Nigel Taylor	TAYLOR, Nigel	MUELLER, Melissa
11/02/2013	09:15 AM	Nigel Taylor	TAYLOR, Nigel	DALY, Alexandra
11/02/2013	09:25 AM	Nigel Taylor	TAYLOR, Nigel	WALKER, Amber
11/02/2013	09:50 AM	Nigel Taylor	TAYLOR, Nigel	REYNOLDS, Toby
11/02/2013	10:35 AM	Nigel Taylor	TAYLOR, Nigel	YATES, Zoe
11/02/2013	11:30 AM	Nigel Taylor	TAYLOR, Nigel	ZIEGLER, Charlotte
11/02/2013	03:00 PM	Nigel Taylor	TAYLOR, Nigel	CUNNINGHAM, William
11/02/2013	03:20 PM	Nigel Taylor	TAYLOR, Nigel	INGRAM, Francesca
12/02/2013	08:00 AM	Nigel Taylor	TAYLOR, Nigel	BOLTON, Sarah
12/02/2013	09:10 AM	Nigel Taylor	TAYLOR, Nigel	MATHER, Bradley
12/02/2013	09:45 AM	Nigel Taylor	TAYLOR, Nigel	DALY, Alexandra
12/02/2013	10:05 AM	Nigel Taylor	TAYLOR, Nigel	YOUNG, Summer
12/02/2013	11:50 AM	Nigel Taylor	TAYLOR, Nigel	GALLAGHER, Harvey
12/02/2013	02:05 PM	Nigel Taylor	TAYLOR, Nigel	WALLACE, Emma
13/02/2013	08:30 AM	Nigel Taylor	TAYLOR, Nigel	FOSTER, Isaac
13/02/2013	09:25 AM	Elizabeth Riley	RILEY, Elizabeth	ABBOTT, Rebecca
13/02/2013	09:40 AM	Nigel Taylor	TAYLOR, Nigel	DALY, Alexandra
13/02/2013	09:55 AM	Nigel Taylor	TAYLOR, Nigel	SCHOFIELD, Aimee
13/02/2013	10:30 AM	Nigel Taylor	TAYLOR, Nigel	REESE, Tyler

To print out an appointment reminder letter to everyone in the list, click Process at the top of the screen. You will then be presented with the **Appointment Reminders Process** window.



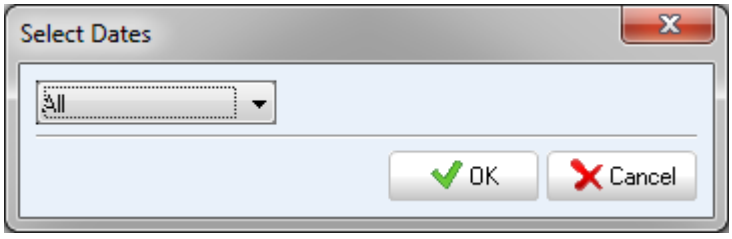
Check the correct letter is selected, and then click **OK**.

Report

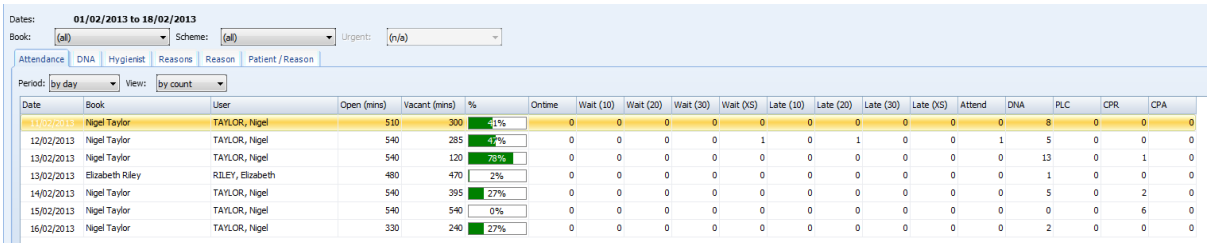
The appointment report gives you in depth information regarding appointments within a chosen period of time. To access this report click the **Report** button under the Appointment heading.

Now click on **Report** in the top left of the screen.

After clicking **Report** the following window appears.



Select the desired date range from the dropdown, and then click **OK** to generate your report.



By default the report will show information for all performers. You can break this down so you can view per dentist. Select the desired performer from the dropdown next to **Book**. You also have the option to view the information per scheme, select from the **Scheme** dropdown list.

The **Attendance** tab allows you to view information such open and vacant time for each performer on certain days within the date range you selected. It also shows the total number of appointments and patient attendance rate.

You also have an option for how the data is presented to you, use the **Period** and **View** dropdown lists to select.

The next tab is **DNA**, this lists all patients that did not attend in the given time period.

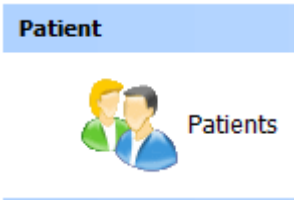
There is also a Hygienist tab, making it easy to monitor appointment behaviour for the hygienist.

Patient

The next section is patient reporting. This allows you to view a wide variety of patient, financial and clinical information.

Patients

SFD allows you to generate very specific reports. The steps below take you through how to generate such a report. To access the Patients Report Click on the **Patients** button.

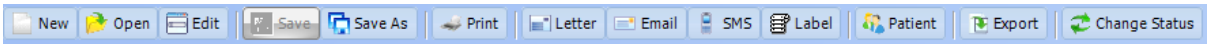


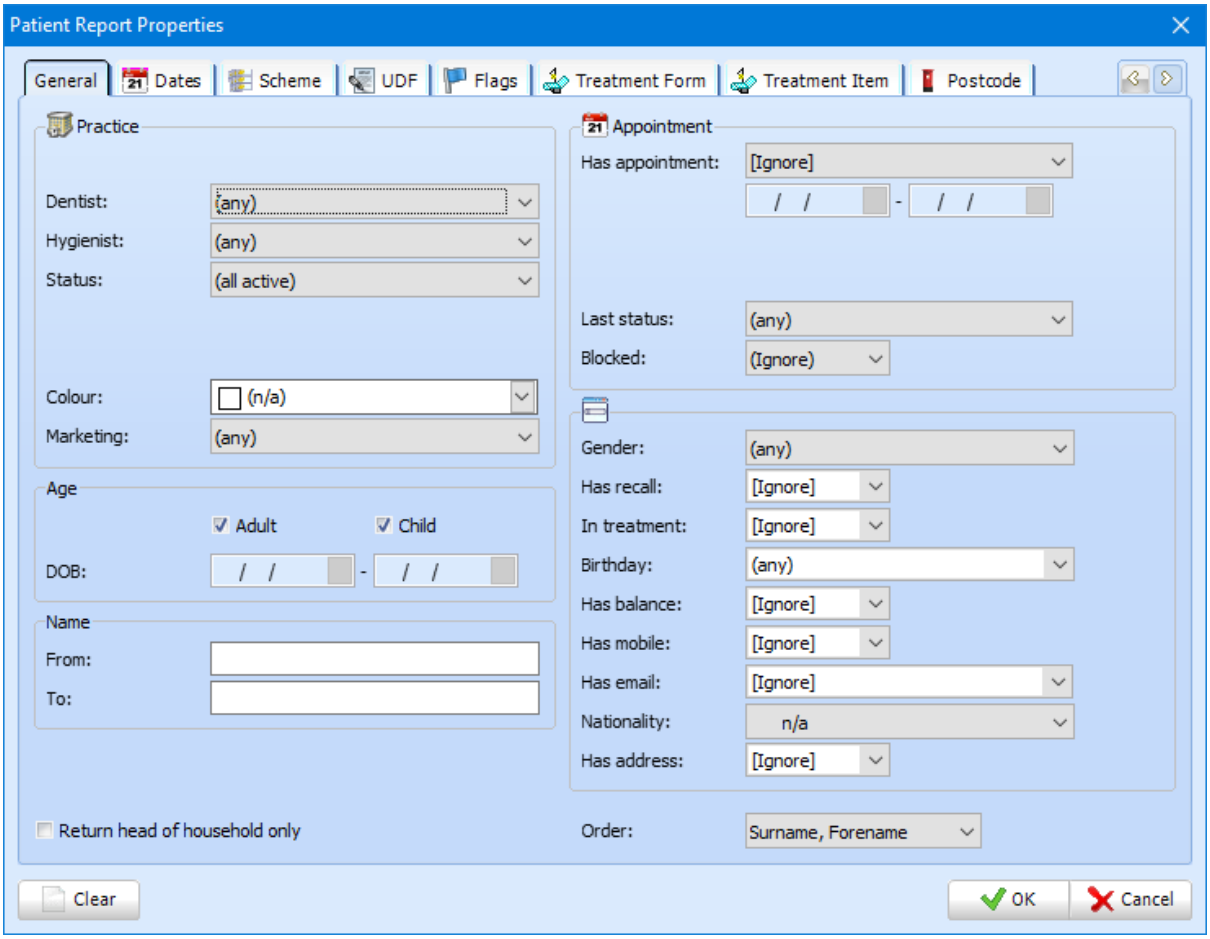
To generate a new report, click on the **New** button. To open a patient report you have already saved, click on the Open button. To edit a pre existing patient report click on the **Edit** button. Once you have created a report. You have the ability to save it, click **Save As** and name the report.

Within the patient report you also have the ability to send correspondence via **Letter/Email/SMS/Label** for the list you of patients you have generated.

You can also export this list by clicking on the **Export** button and finding a location you wish to save the report to.

The last button on this bar is the **Change Status** button. You can change the dentist, hygienist, patient status or scheme.

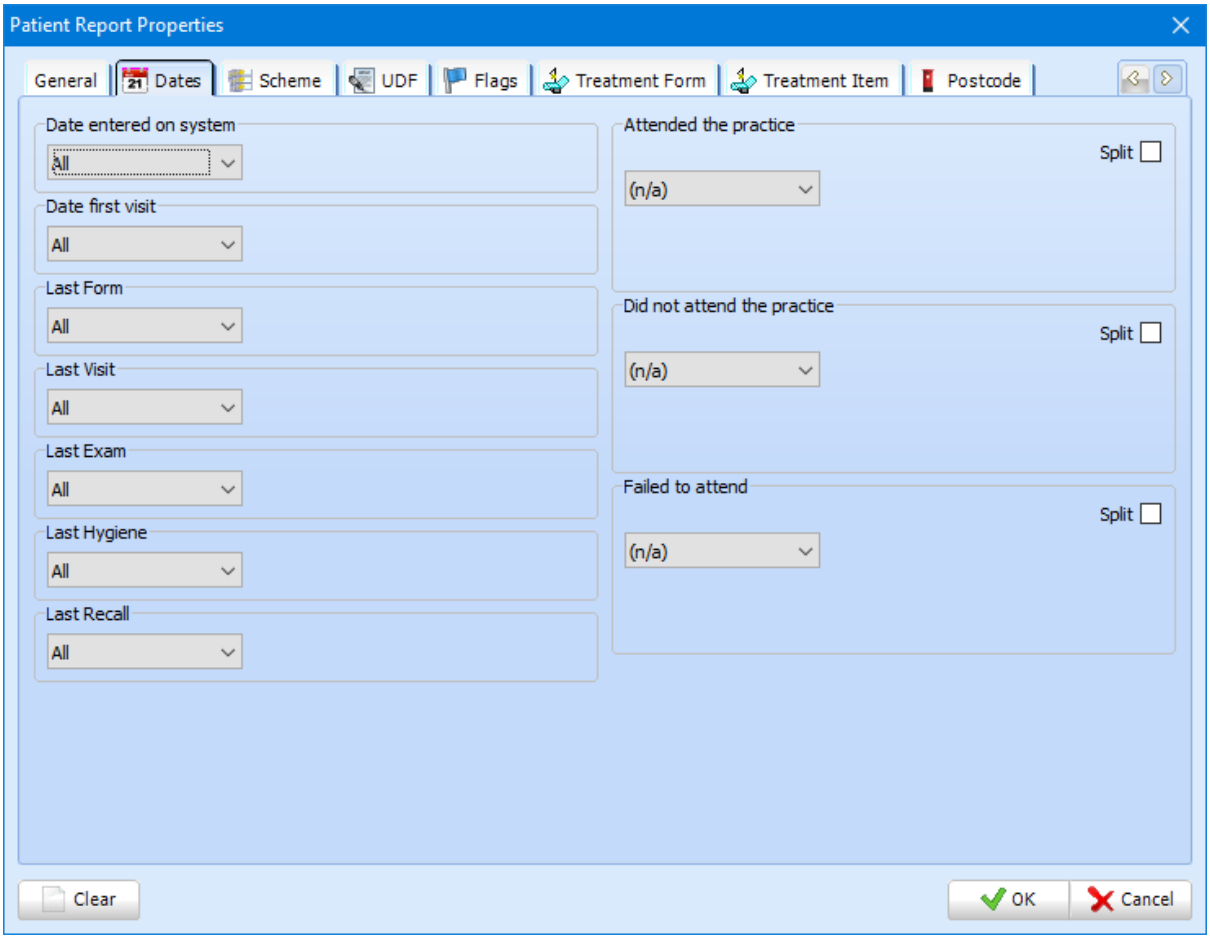




The **General** tab allows you to choose specific dentists, hygienists and therapists. This can be useful if the dentist, for example, wishes to generate a list of all their patients.

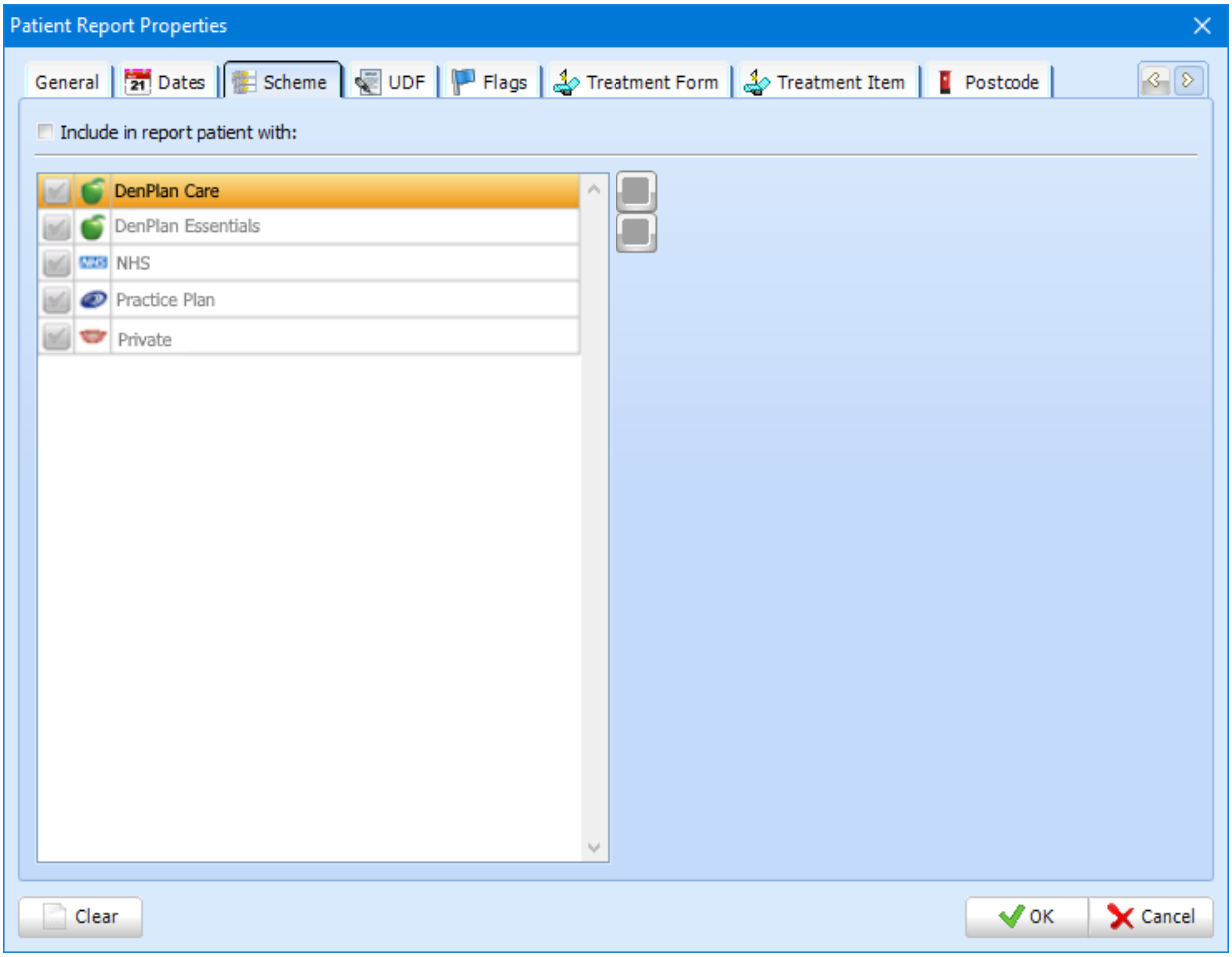
Most options are self explanatory therefore do not require a definition here, ‘Has mobile’ would either be ‘Yes’ or ‘No’ for example.

In the Name section you could enter 'R' next to **From** and 'T' next to **To** and this would give you a list of patients with surnames starting with R, S and T.

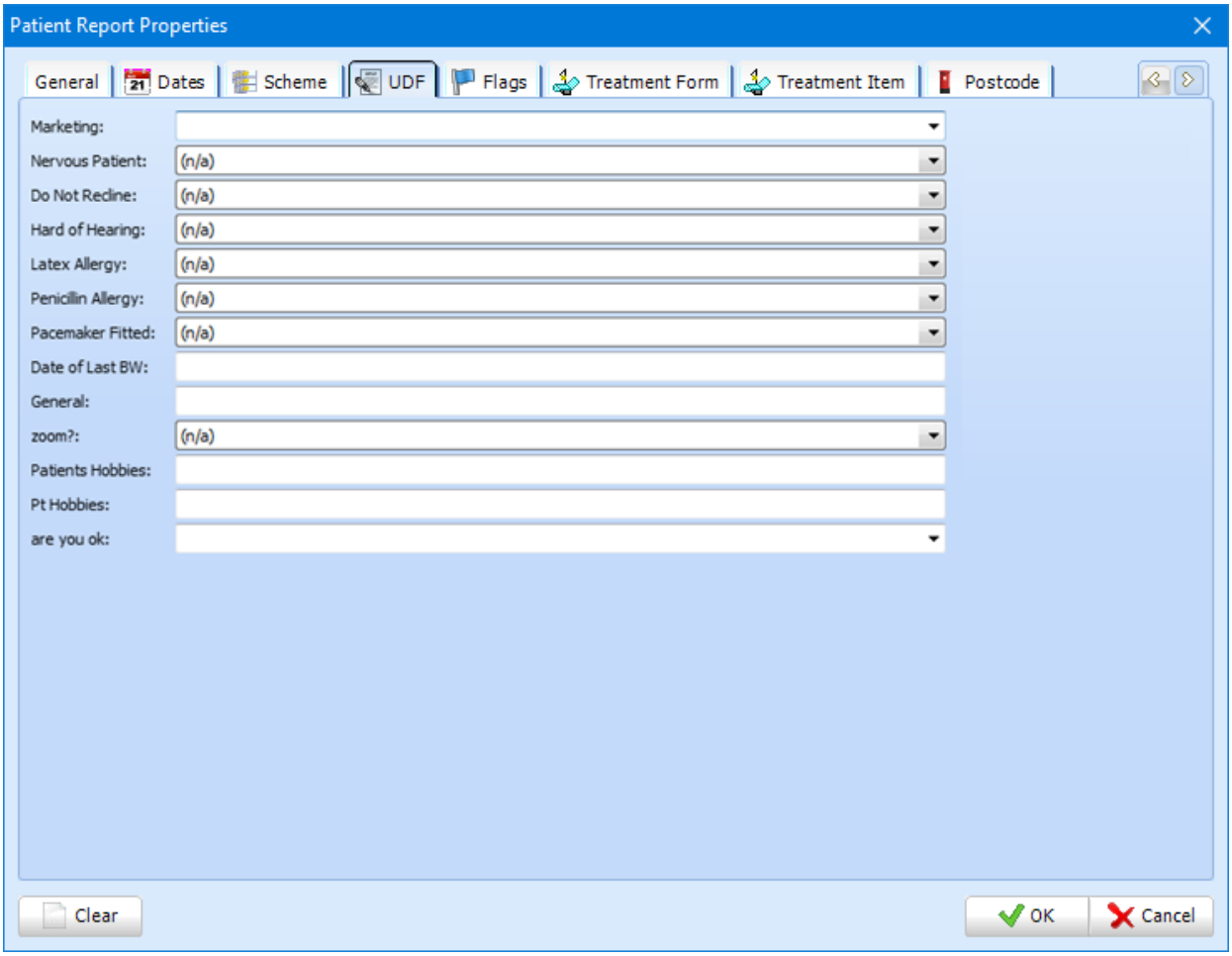


The next tab is **Dates**. All fields in this tab are self-explanatory. From each field you get a dropdown list which gives you a lot of options.

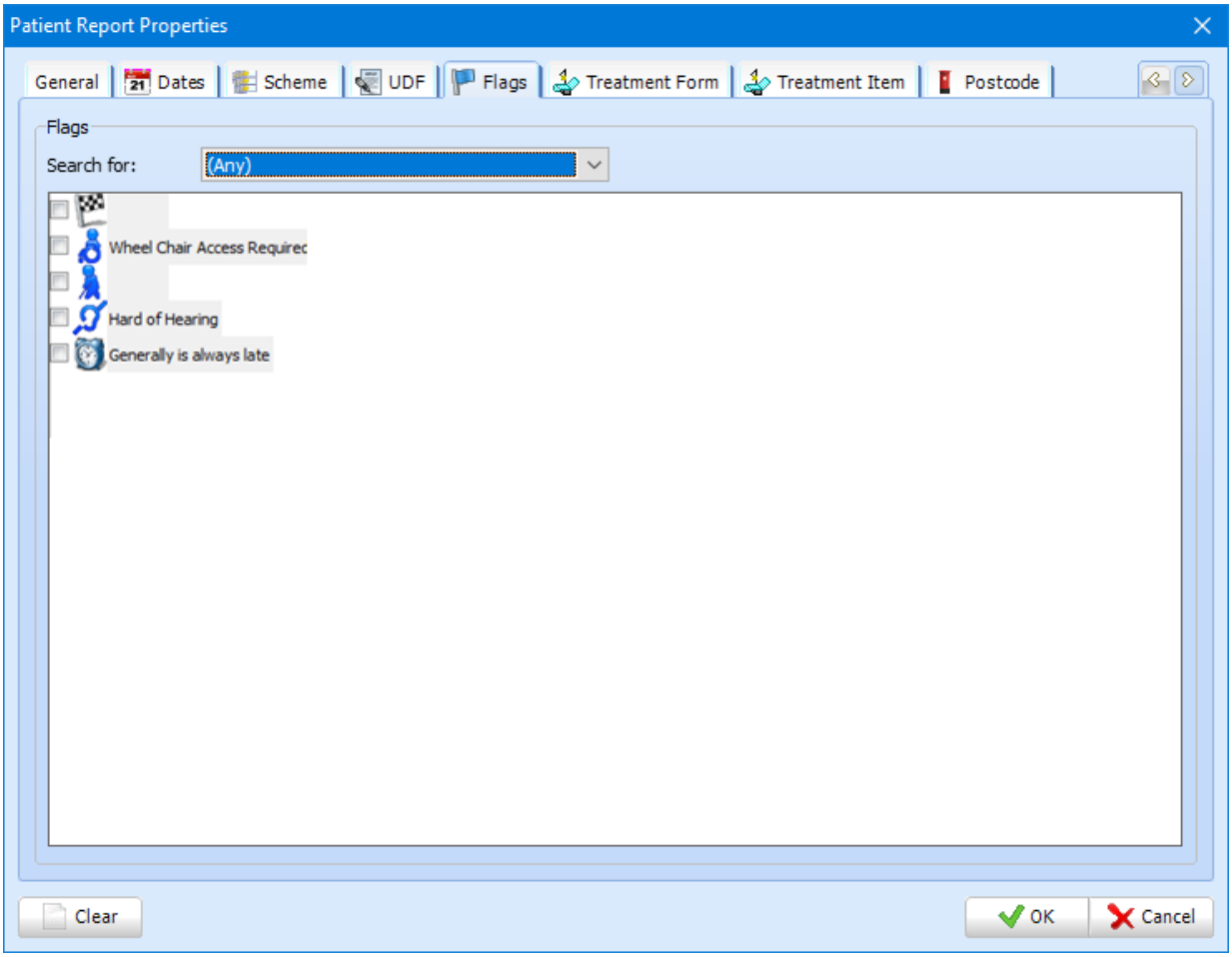
The options **On**, **Before**, **After** and **Between** allow you to enter specific dates once you have selected one of them from the dropdown list. All other options from the dropdown list generate a date automatically.



The **Schemes** tab allows you to select specific schemes. Check **Include in report patient with** then select the schemes you wish to report on.

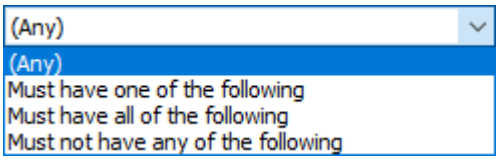


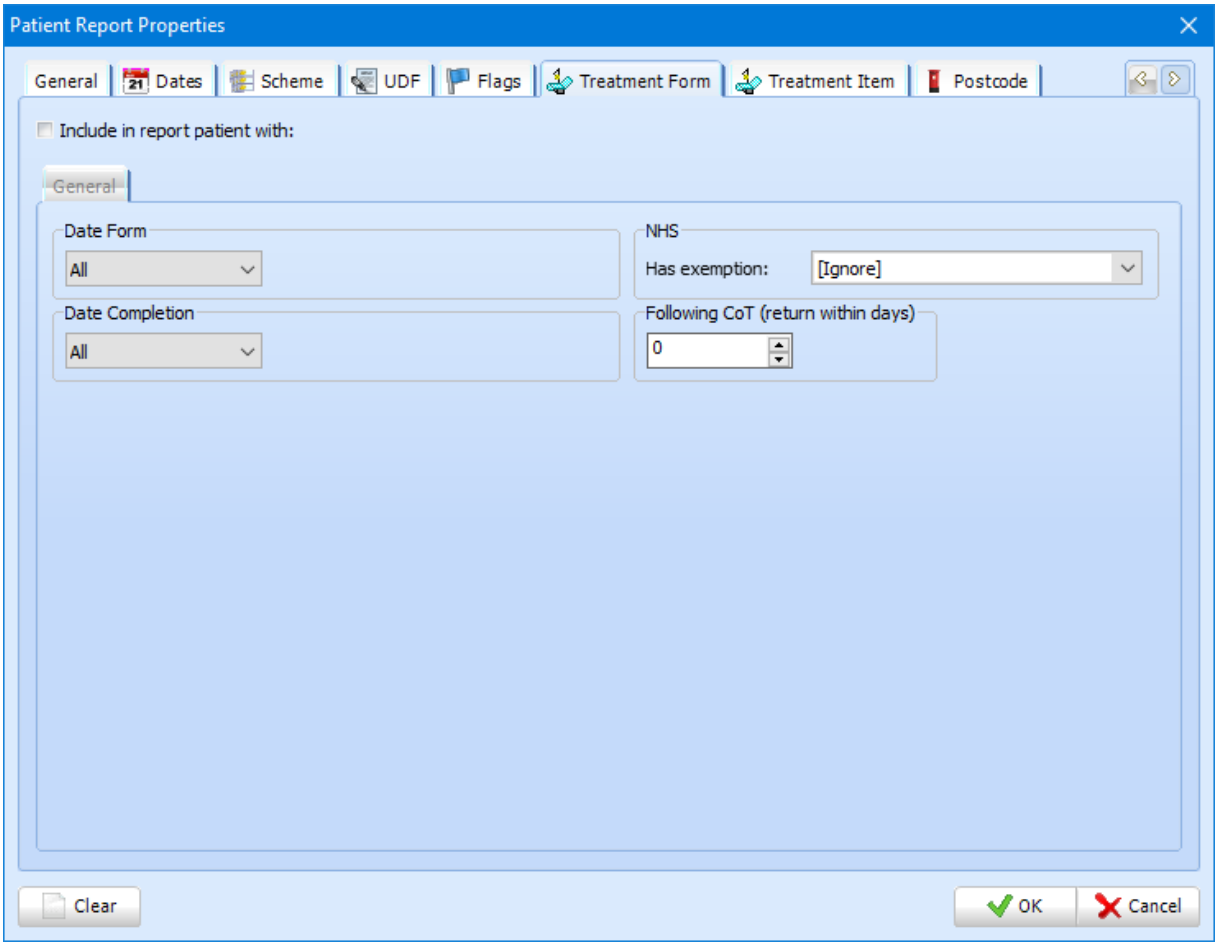
The fourth tab is the **UDF** tab. You may not have any UDFs set up (see the Setup part of the manual) but if you do this can be a very handy tool. In the example above 'Y' is marked next to 'Latex Allergy', the will list all of the patients that have been marked as 'Y' (indicating that they do have a latex allergy).



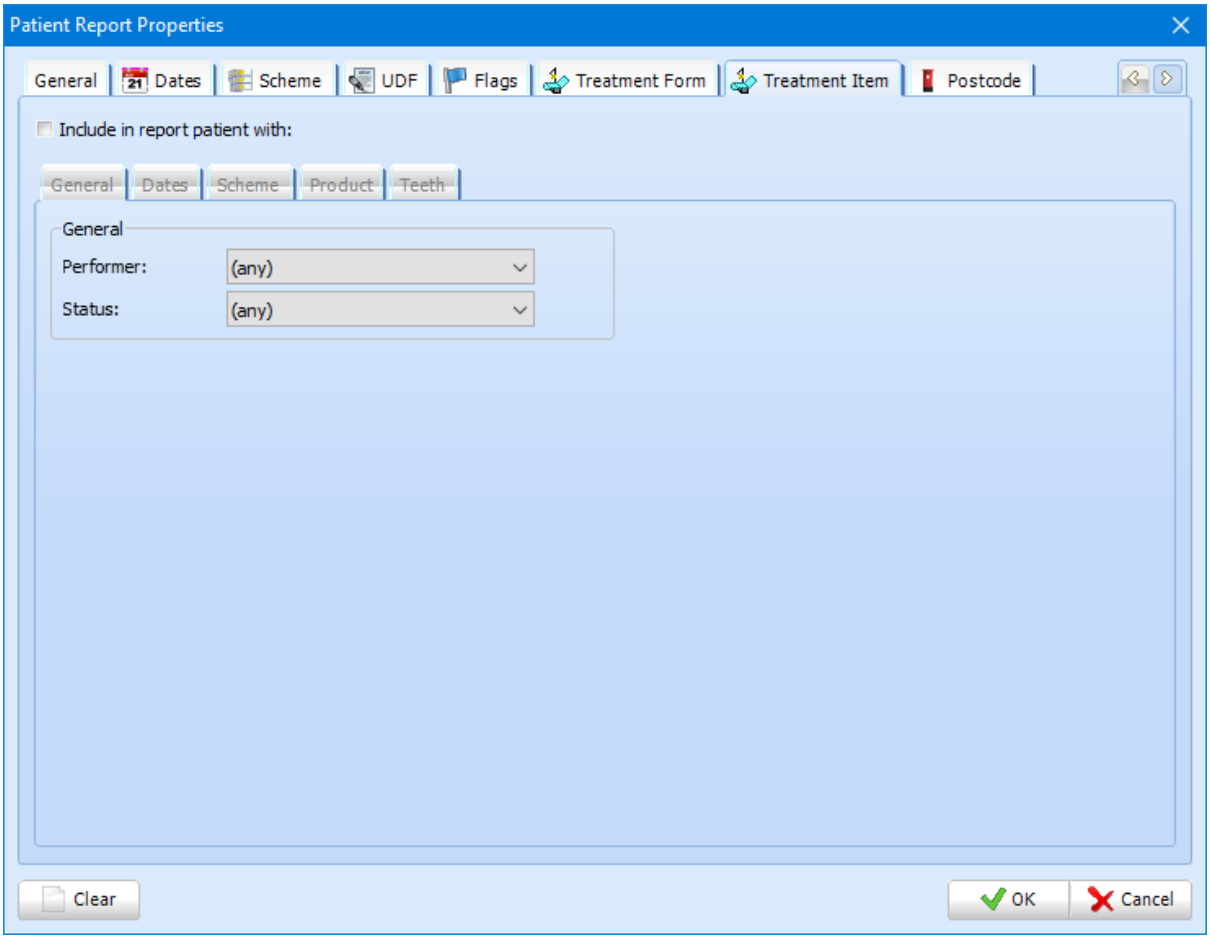
The next tab is the **Flags** tab. Within this tab you can filter your report by flags you have assigned to certain patients. Tick the flags you want your report to be defined by. From the dropdown list next to **Search For** you can choose whether the patients you want your report to include has one of the selected flags or has all of the ticked flags assigned to them.

The options for **Search For** are as follows.

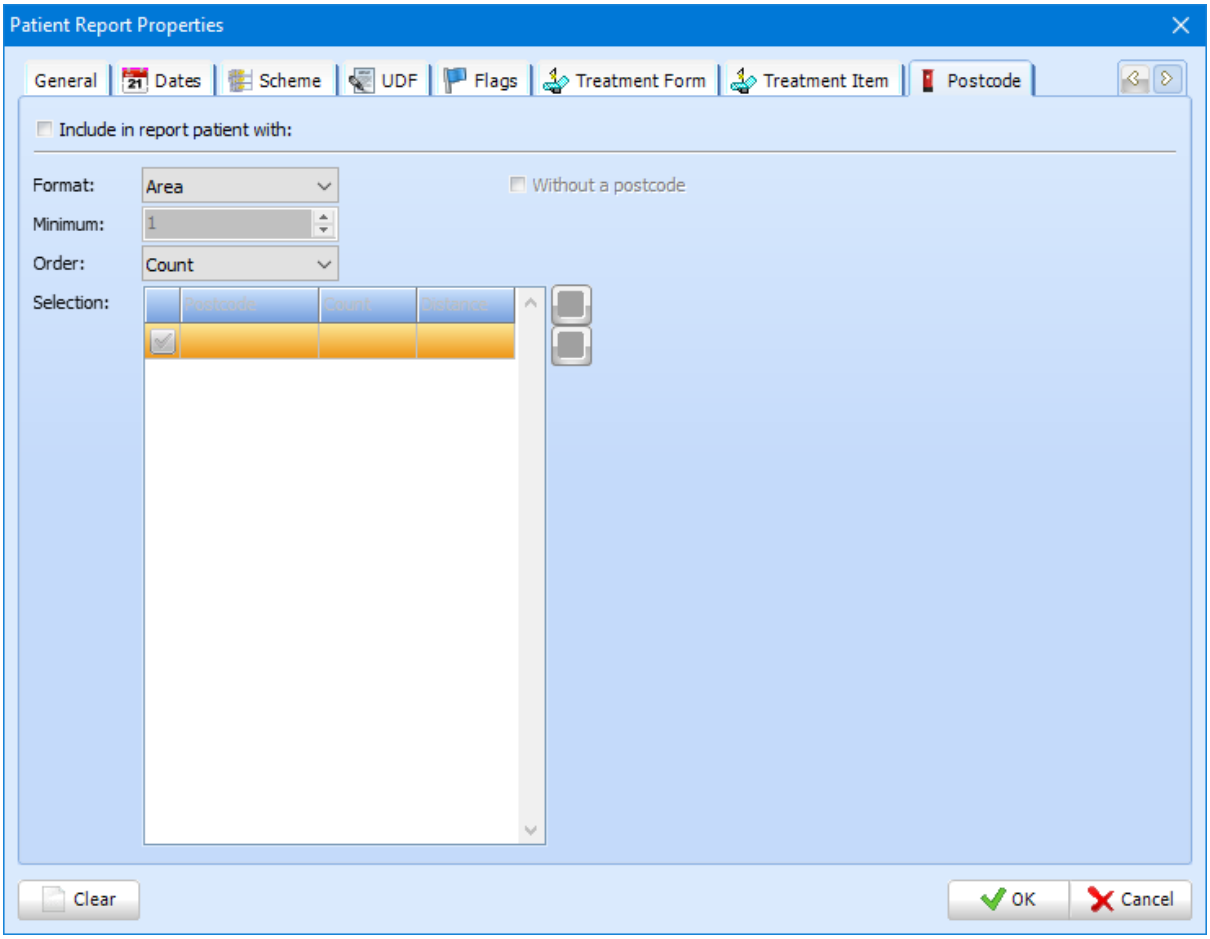




The **Treatment Form** tab allows you to filter patients based on treatment form properties such as date of form creation or completion. To activate this part of the report you will need to first click the **Include in report patient with:** checkbox.

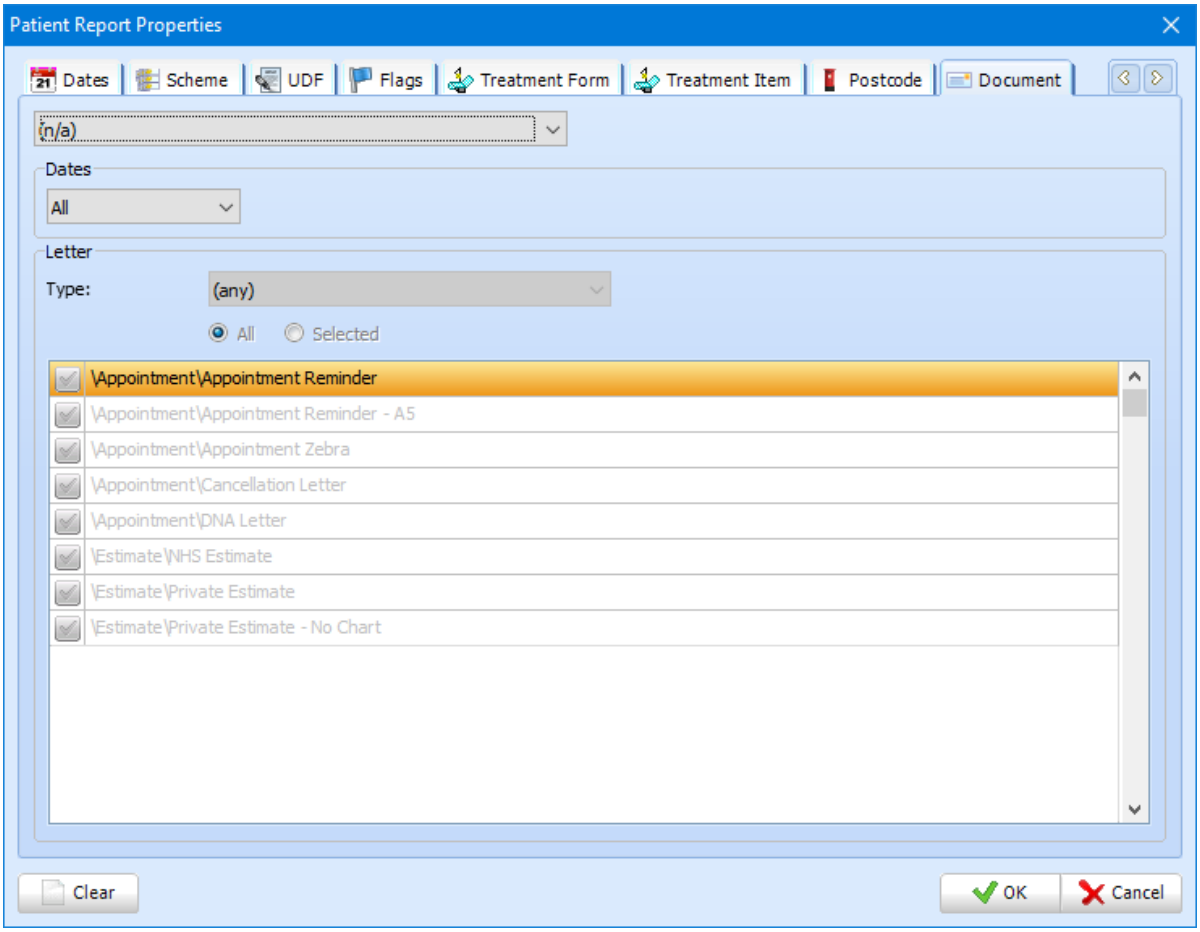


Within the **Treatment Item** tab you can filter patients based on items that have been added to a treatment form. This can be narrowed further by the tooth and scheme.

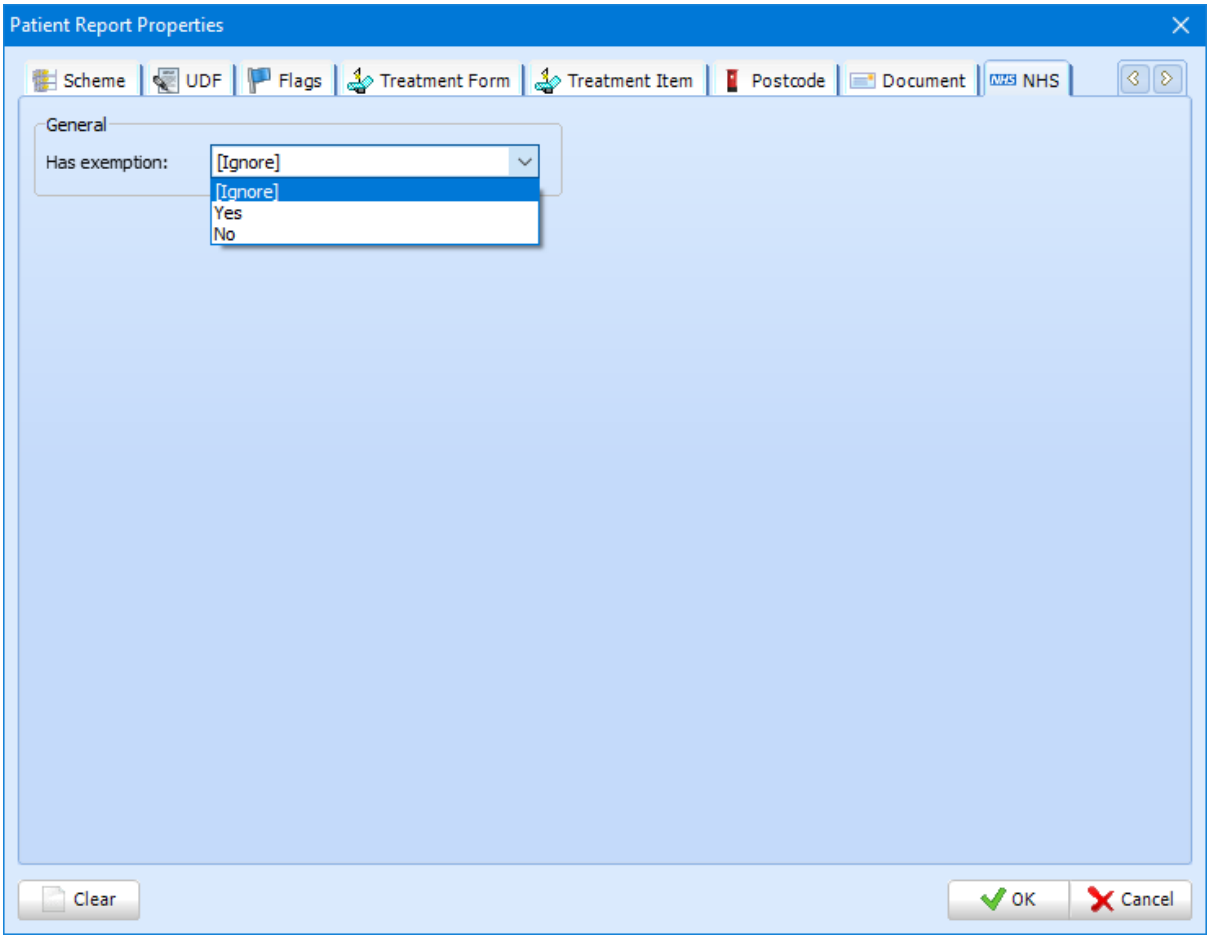


Next is the **Postcode** tab. To activate this part of the report, check the **Include in report patient with:** checkbox

You are able to filter patients based on their postcode (or if they do not have one).



Within the **Document** tab, you are able to filter patients by whether they have or have not received a certain document type as well as specifying dates.



The **NHS** tab allows you to filter patients based on if they do or do not have an exemption.

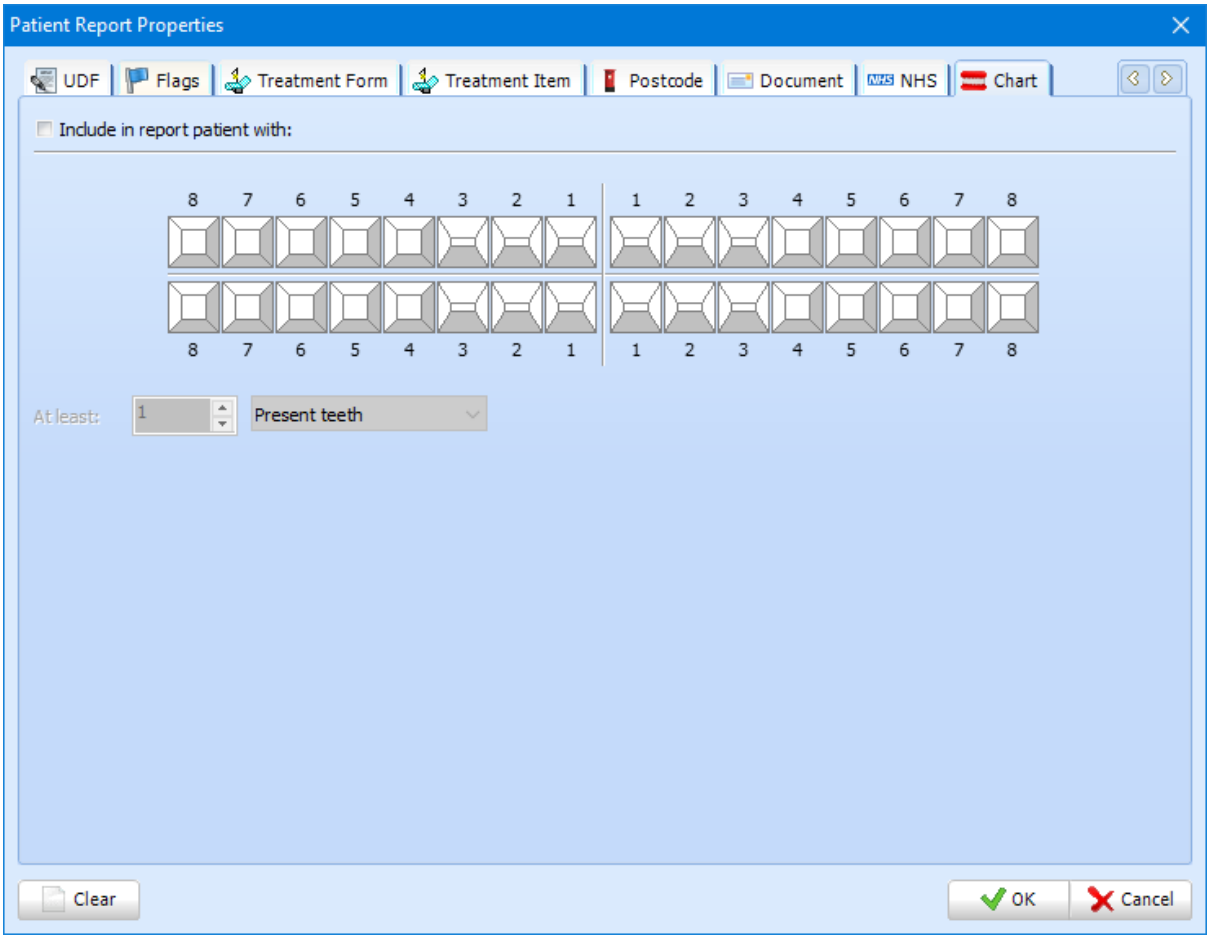
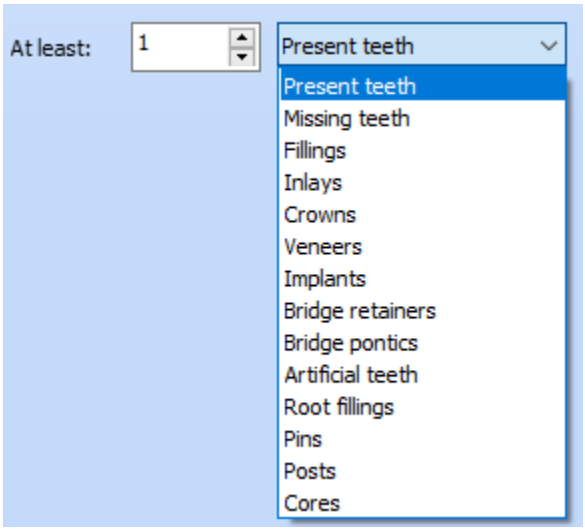
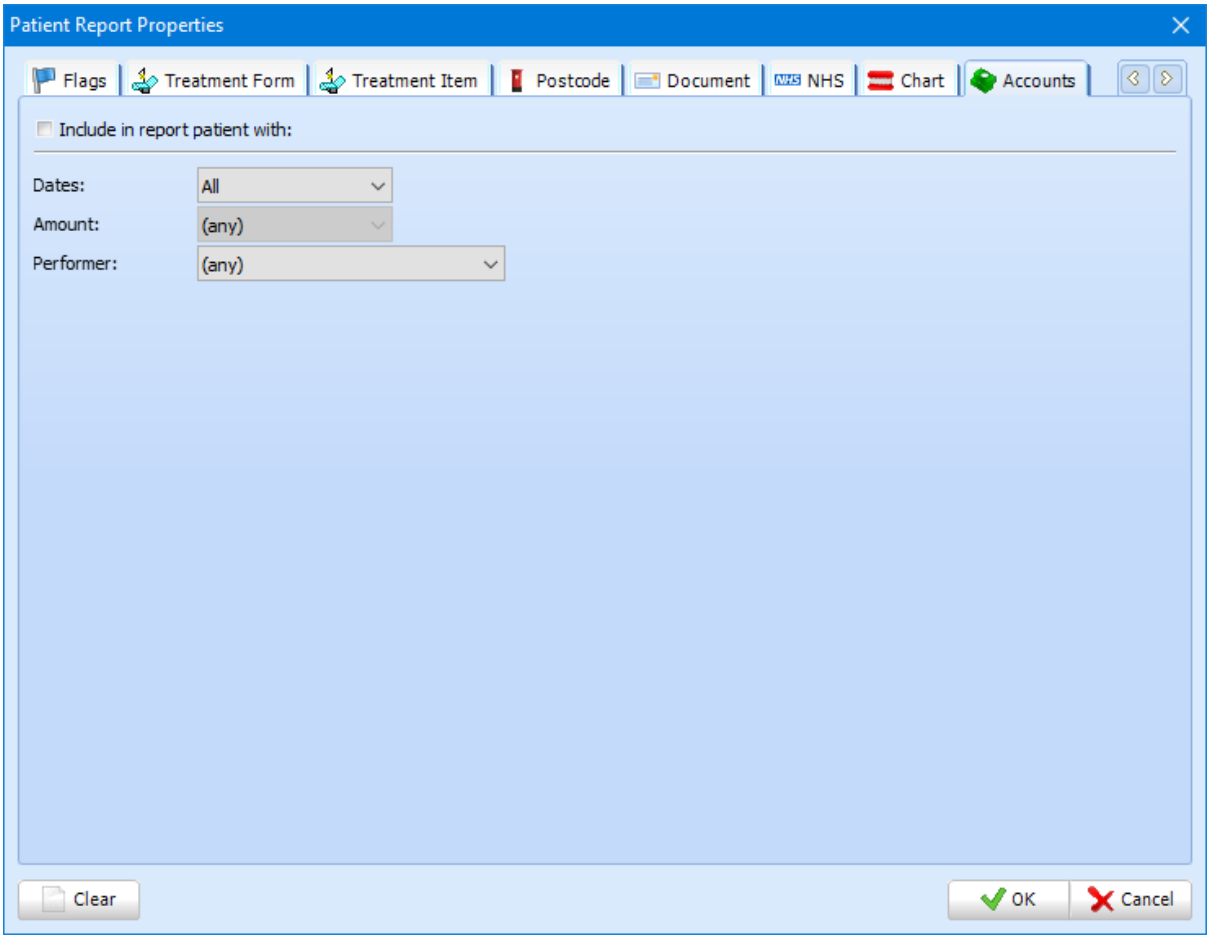
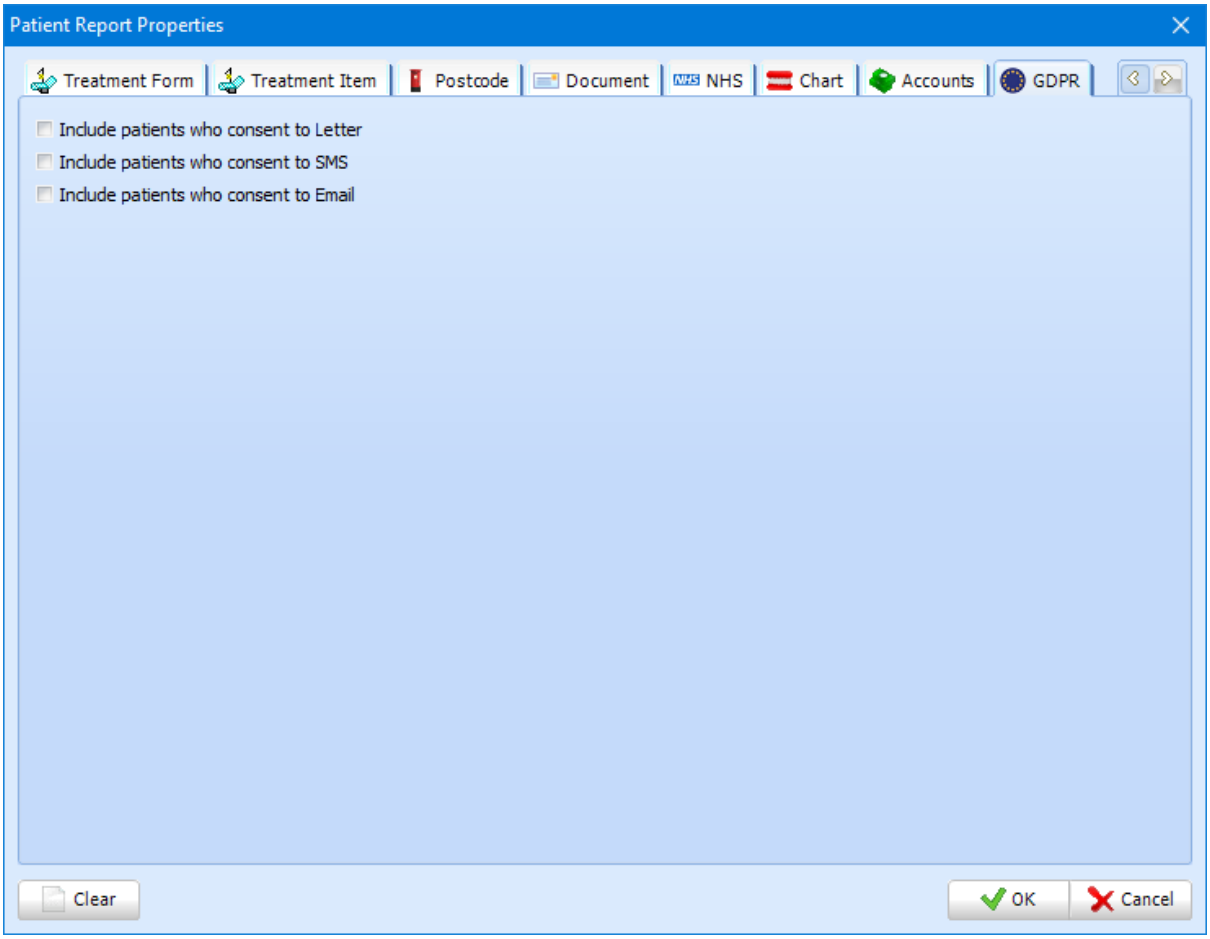


Chart allows you to filter patients based on many options relating to patient teeth such as missing, number of implants or crowns.





The **Accounts** tab allows you to filter patients based on their account balance. You can specify a range to show should you wish (E.g. Patients who have a debit or credit between £10 and £50).

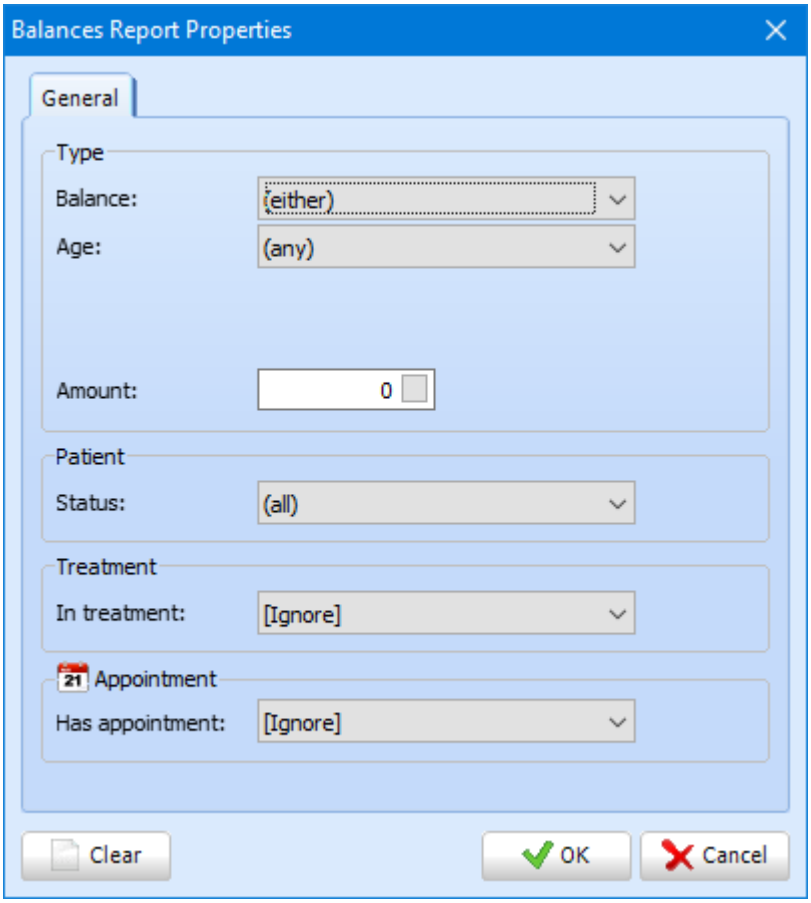


GDPR tab allows you to filter patients based on their GDPR contact preferences. Tick the required option(s).

Balances

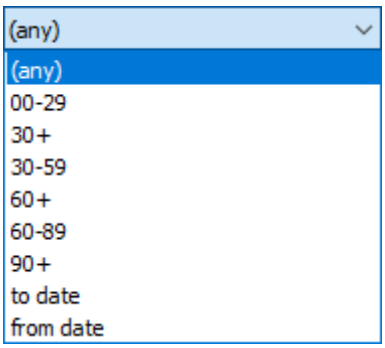
SFD gives you the ability to generate a list of patients who are either in debt or in credit with the practice. The steps below show you how to generate this list using the **Balances** report.
In **Reports** section of SFD, click the **Balances** button.

Now click on **Report** towards the top left of your screen, the window below appears.



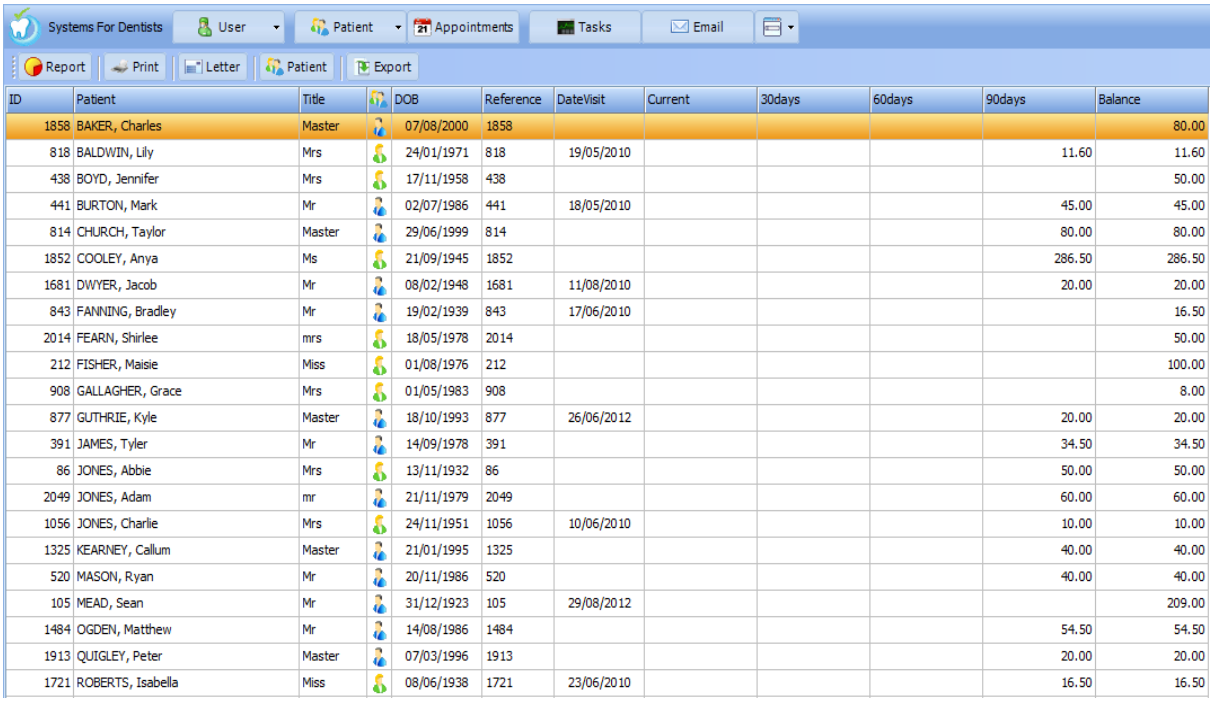
The first option is **Balance**. Here you can choose to show patients who are either in credit or debit.

The next dropdown is **Age**. This dropdown allows you to select how long a patient has either owed money or been in credit for. You can also select a custom date range by selecting **to date** or **from date**.



Status allows you to select whether you wish to show active or inactive patients or both in your report.
Finally are the **In Treatment** and **Has appointment** options. This gives you the ability to choose whether the patients are in treatment or not as well as if they have an appointment booked.

Once you have entered finished specifying your criteria, click **OK** to display the results.



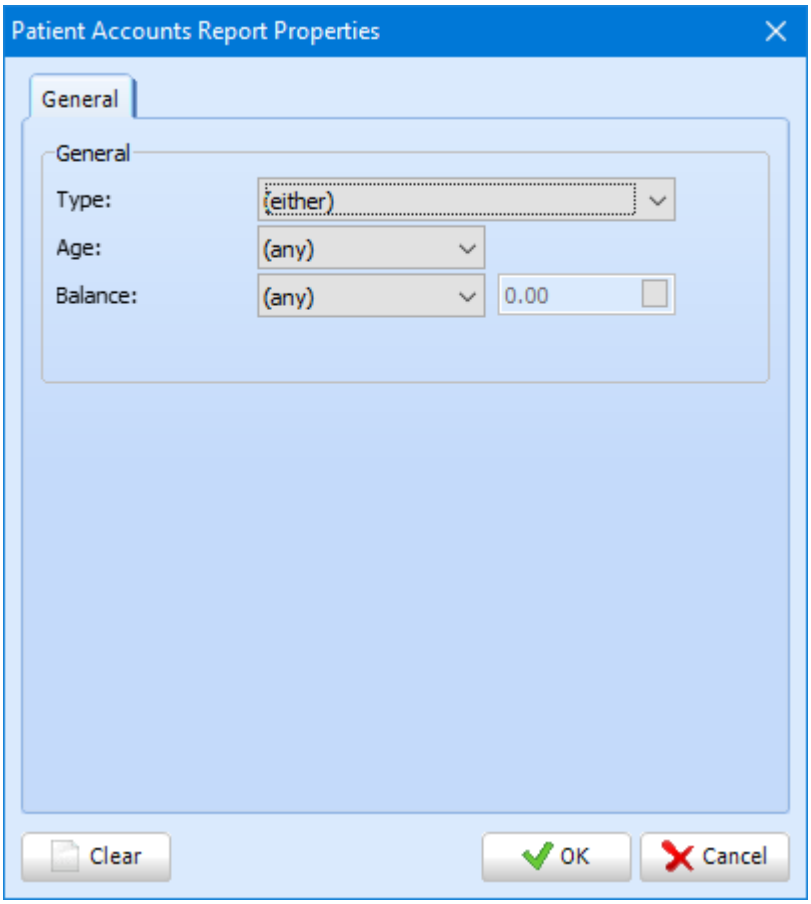
ID	Patient	Title	DOB	Reference	DateVisit	Current	30days	60days	90days	Balance
1858	BAKER, Charles	Master	07/08/2000	1858						80.00
818	BALDWIN, Lily	Mrs	24/01/1971	818	19/05/2010				11.60	11.60
438	BOYD, Jennifer	Mrs	17/11/1958	438						50.00
441	BURTON, Mark	Mr	02/07/1986	441	18/05/2010				45.00	45.00
814	CHURCH, Taylor	Master	29/06/1999	814					80.00	80.00
1852	COOLEY, Anya	Ms	21/09/1945	1852					286.50	286.50
1681	DWYER, Jacob	Mr	08/02/1948	1681	11/08/2010				20.00	20.00
843	FANNING, Bradley	Mr	19/02/1939	843	17/06/2010					16.50
2014	FEARN, Shirlee	mrs	18/05/1978	2014						50.00
212	FISHER, Maisie	Miss	01/08/1976	212						100.00
908	GALLAGHER, Grace	Mrs	01/05/1983	908						8.00
877	GUTHRIE, Kyle	Master	18/10/1993	877	26/06/2012				20.00	20.00
391	JAMES, Tyler	Mr	14/09/1978	391					34.50	34.50
86	JONES, Abbie	Mrs	13/11/1932	86					50.00	50.00
2049	JONES, Adam	mr	21/11/1979	2049					60.00	60.00
1056	JONES, Charlie	Mrs	24/11/1951	1056	10/06/2010				10.00	10.00
1325	KEARNEY, Callum	Master	21/01/1995	1325					40.00	40.00
520	MASON, Ryan	Mr	20/11/1986	520					40.00	40.00
105	MEAD, Sean	Mr	31/12/1923	105	29/08/2012					209.00
1484	OGDEN, Matthew	Mr	14/08/1986	1484					54.50	54.50
1913	QUIGLEY, Peter	Master	07/03/1996	1913					20.00	20.00
1721	ROBERTS, Isabella	Miss	08/06/1938	1721	23/06/2010				16.50	16.50

Accounts

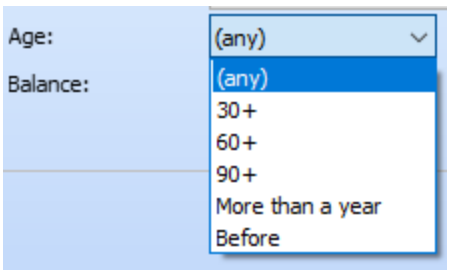
The patient **Accounts** report is used for seeing the number of patients that are either in credit or debit, and the age. To access this report click on the **Accounts** icon within the **Patient** section of the report screen.

Once you have clicked the **Accounts** button, click **Report** in the top left hand corner of the screen.

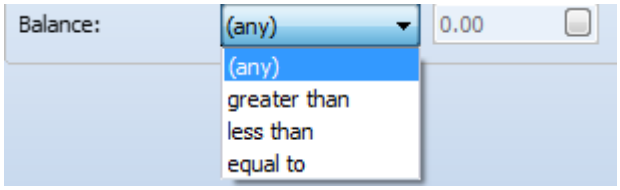
After clicking report you will be presented with the following window.



Next to Type, you can choose whether the patient is in debit or credit. From the age dropdown you have the following options.

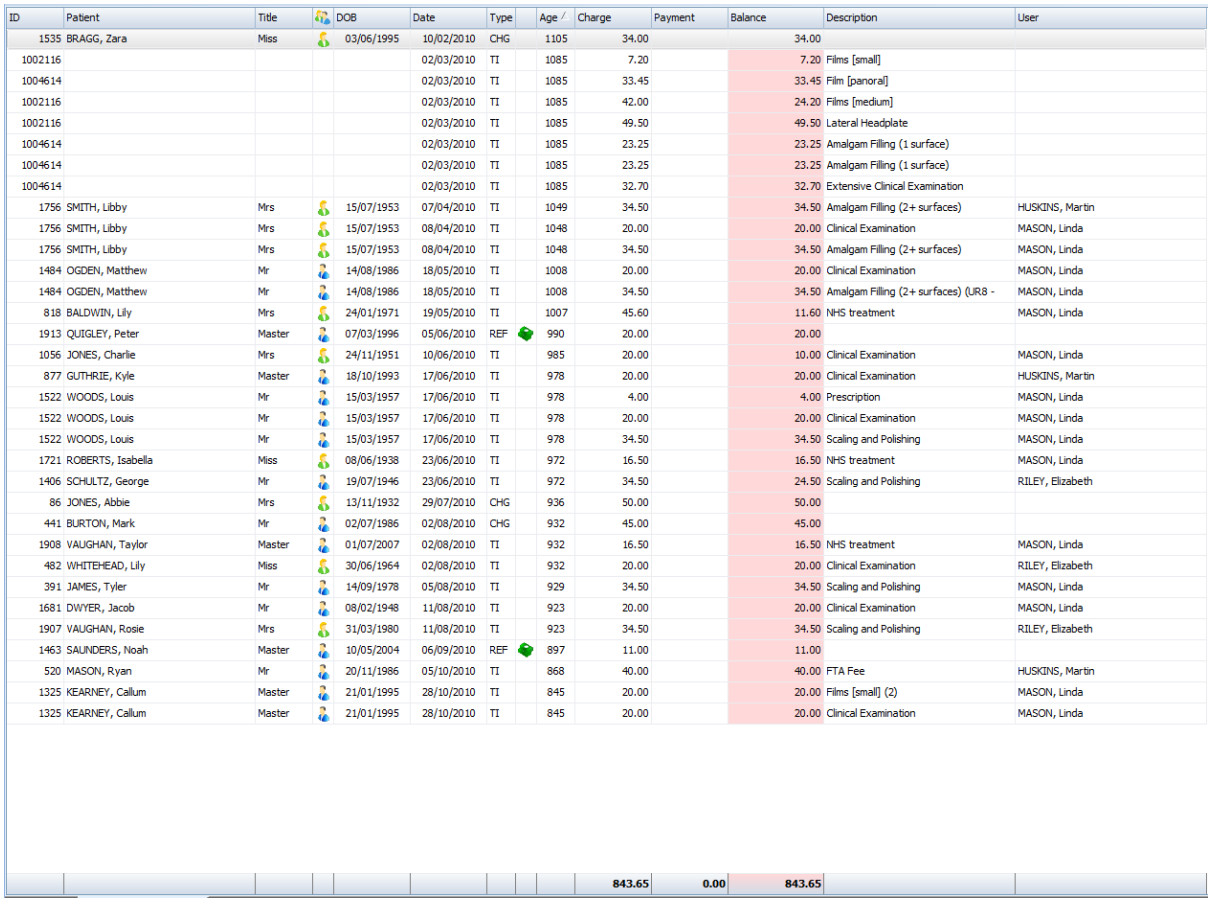


Finally you can choose how much the patients are either in credit or debit by.



To enter an amount, choose an option from the dropdown list then enter the amount.

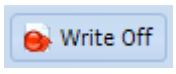
Once you have finalised your criteria, click **OK**.



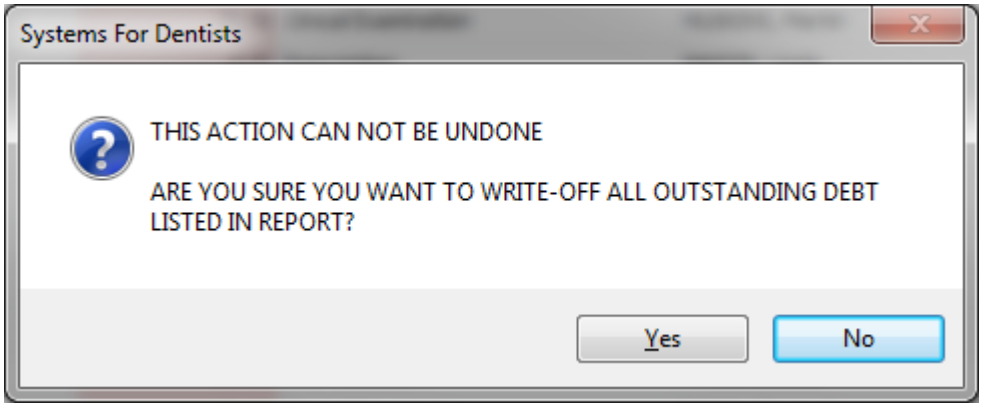
ID	Patient	Title	DOB	Date	Type	Age	Charge	Payment	Balance	Description	User
1535	BRAGG, Zara	Miss	03/06/1995	10/02/2010	CHG	1105	34.00		34.00		
1002116				02/03/2010	TI	1085	7.20		7.20	Films [small]	
1004614				02/03/2010	TI	1085	33.45		33.45	Film [panoral]	
1002116				02/03/2010	TI	1085	42.00		24.20	Films [medium]	
1002116				02/03/2010	TI	1085	49.50		49.50	Lateral Headplate	
1004614				02/03/2010	TI	1085	23.25		23.25	Amalgam Filling (1 surface)	
1004614				02/03/2010	TI	1085	23.25		23.25	Amalgam Filling (1 surface)	
1004614				02/03/2010	TI	1085	32.70		32.70	Extensive Clinical Examination	
1756	SMITH, Libby	Mrs	15/07/1953	07/04/2010	TI	1049	34.50		34.50	Amalgam Filling (2+ surfaces)	HUSKINS, Martin
1756	SMITH, Libby	Mrs	15/07/1953	08/04/2010	TI	1048	20.00		20.00	Clinical Examination	MASON, Linda
1756	SMITH, Libby	Mrs	15/07/1953	08/04/2010	TI	1048	34.50		34.50	Amalgam Filling (2+ surfaces)	MASON, Linda
1484	OGDEN, Matthew	Mr	14/08/1986	18/05/2010	TI	1008	20.00		20.00	Clinical Examination	MASON, Linda
1484	OGDEN, Matthew	Mr	14/08/1986	18/05/2010	TI	1008	34.50		34.50	Amalgam Filling (2+ surfaces) (UR8 -	MASON, Linda
818	BALDWIN, Lily	Mrs	24/01/1971	19/05/2010	TI	1007	45.60		11.60	NHS treatment	MASON, Linda
1913	QUIGLEY, Peter	Master	07/03/1996	05/06/2010	REF	990	20.00		20.00		
1056	JONES, Charlie	Mrs	24/11/1951	10/06/2010	TI	985	20.00		10.00	Clinical Examination	MASON, Linda
877	GUTHRIE, Kyle	Master	18/10/1993	17/06/2010	TI	978	20.00		20.00	Clinical Examination	HUSKINS, Martin
1522	WOODS, Louis	Mr	15/03/1957	17/06/2010	TI	978	4.00		4.00	Prescription	MASON, Linda
1522	WOODS, Louis	Mr	15/03/1957	17/06/2010	TI	978	20.00		20.00	Clinical Examination	MASON, Linda
1522	WOODS, Louis	Mr	15/03/1957	17/06/2010	TI	978	34.50		34.50	Scaling and Polishing	MASON, Linda
1721	ROBERTS, Isabella	Miss	08/06/1938	23/06/2010	TI	972	16.50		16.50	NHS treatment	MASON, Linda
1406	SCHULTZ, George	Mr	19/07/1946	23/06/2010	TI	972	34.50		24.50	Scaling and Polishing	RILEY, Elizabeth
86	JONES, Abbie	Mrs	13/11/1932	29/07/2010	CHG	936	50.00		50.00		
441	BURTON, Mark	Mr	02/07/1986	02/08/2010	CHG	932	45.00		45.00		
1908	VAUGHAN, Taylor	Master	01/07/2007	02/08/2010	TI	932	16.50		16.50	NHS treatment	MASON, Linda
482	WHITEHEAD, Lily	Miss	30/06/1964	02/08/2010	TI	932	20.00		20.00	Clinical Examination	RILEY, Elizabeth
391	JAMES, Tyler	Mr	14/09/1978	05/08/2010	TI	929	34.50		34.50	Scaling and Polishing	MASON, Linda
1681	DWYER, Jacob	Mr	08/02/1948	11/08/2010	TI	923	20.00		20.00	Clinical Examination	MASON, Linda
1907	VAUGHAN, Rosie	Mrs	31/03/1980	11/08/2010	TI	923	34.50		34.50	Scaling and Polishing	RILEY, Elizabeth
1463	SAUNDERS, Noah	Master	10/05/2004	06/09/2010	REF	897	11.00		11.00		
520	MASON, Ryan	Mr	20/11/1986	05/10/2010	TI	868	40.00		40.00	FTA Fee	HUSKINS, Martin
1325	KEARNEY, Callum	Master	21/01/1995	28/10/2010	TI	845	20.00		20.00	Films [small] (2)	MASON, Linda
1325	KEARNEY, Callum	Master	21/01/1995	28/10/2010	TI	845	20.00		20.00	Clinical Examination	MASON, Linda
							843.65	0.00	843.65		

From the report you can view the exact age, patient name and ID, how much they were charged and the patient balance. Other useful information is what the charge was far and what user the charge is against.

In certain circumstances there may be a time where you wish to write off all debt in a certain time period. To write off debt for every patient included in the accounts report click on the Write Off button at the top of the screen.



You will then be presented with the following window.

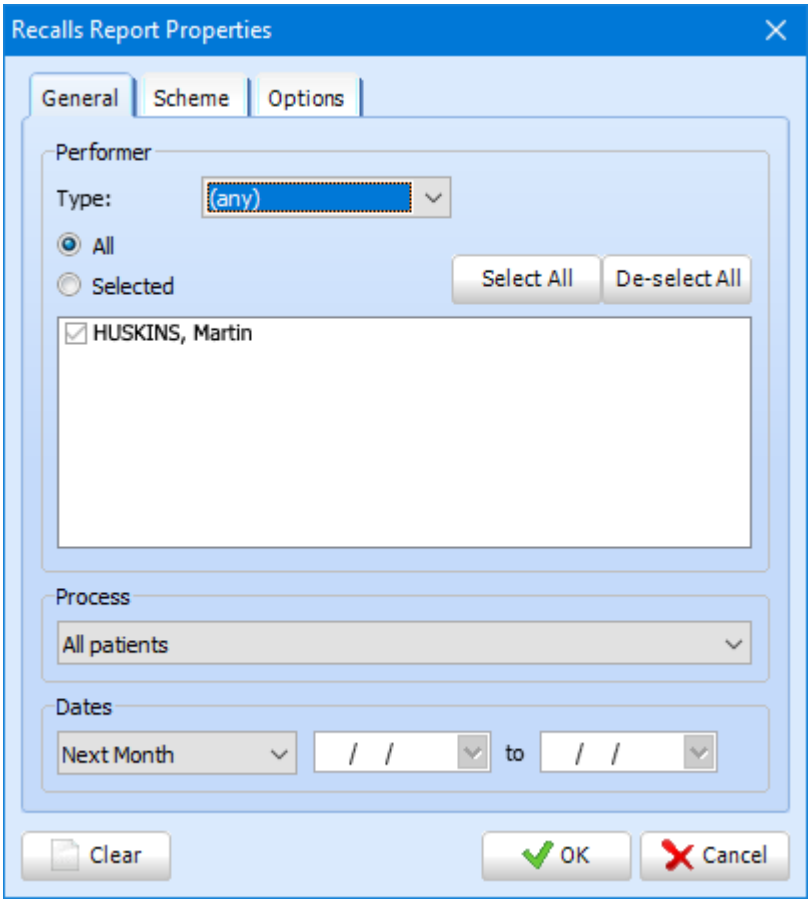


After clicking yes, you may require a password. **Contact support on 0845 643 2727 to receive the password.**

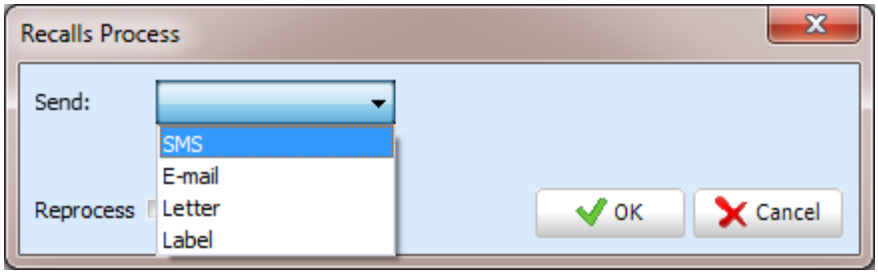
Recalls

In SFD there is a very easy way of generating a list of patients that are due a recall. To do this, follow the steps below.
To access the report click on the **Recalls** button.

After clicking **Recalls**, click **Report** in the top left of the screen
The **Recalls Report Properties** window will now appear. In the **General** tab you can pick the type of performer or choose from the list underneath. You can also select the process and the date. Under the **Scheme** tab you can select patients who are registered with specific schemes. Finally under the **Options** tab, you can set the ordering of your results. Once you are happy with the values you have entered into this window, click **OK** in the bottom right of the screen.



Once the report is generated you can click the **Process** button. The **Recalls Process** window below appears.

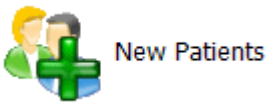


You can now choose which method you want your recalls to be distributed by. For example, if you selected SMS everyone who has a valid mobile number in their patient record within the recall report will be sent a recall reminder via SMS. Once the recall has been processed a green tick appears under the column of which method you chose for recall.

This list is available to print. To do this, click on the **Print** button at the top of the screen.

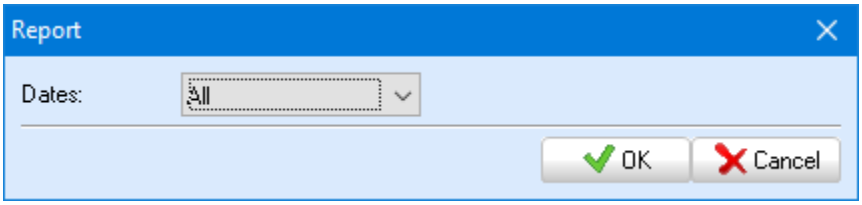
New Patients

The **New Patients** report allows you to view patients that were entered into the system within a certain time period. To access this report, click on the **New Patients** button.

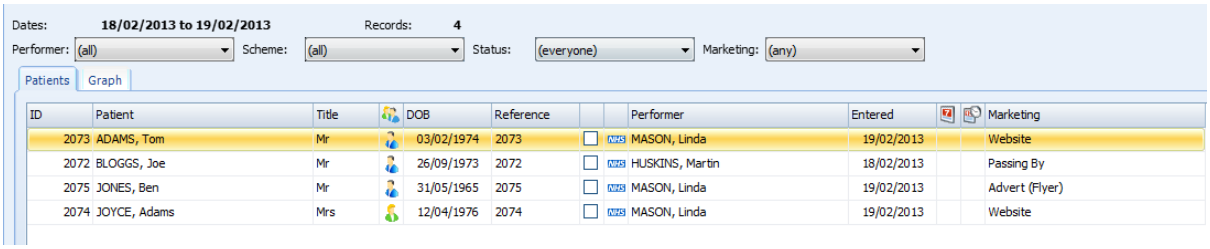


Now that you have entered the **New Patients** report screen, click **Report** in the top left hand corner.

You will then be presented with the **Select Dates** window.



Select the date range you wish to view new patients for. In the example I am going to select new patient for the current week. Click **OK** to confirm.



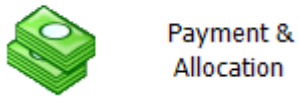
The report generates a list of the patient that they were entered into the system between the dates entered in the format shown above. As well as the patient's basic details you can view the exact date they were entered on the system, the scheme the patient was added to, along with the performer they were assigned to and what marketing method they joined via in the **Marketing** column.

You then have 4 filters at the top of the window which can narrow down your results.

Payment & Allocation

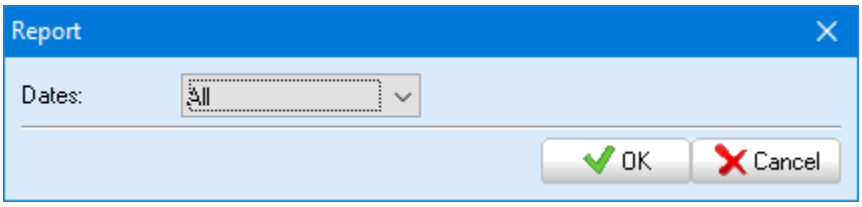
The next report in the **Patient** section is **Payment & Allocation**. This report allows you to view all transactions entered in a chosen time period. You can also view who the payment was allocated to and by which method. You can also view which schemes the payments were allocated to if you are a mixed scheme practice.

To access this report, click on the **Payment & Allocation** button.



Once you are within the **Payment & Allocation** screen, click **Report** in the top left hand corner.

You will then be presented with the **Select Dates** window.



After clicking **OK,** you will be presented with your report for your selected time period. The report will open in the **Summary** tab.

Date	01/02/2013 - 20/02/2013

Practice								
Nominal	Type	Cash	Cheque	Card	Finance	n/a	Charges	Total
Sales	PAY	£10.00		£25.00				£35.00
Total		£10.00		£25.00				£35.00

Huskins, Martin								
Nominal	Type	Cash	Cheque	Card	Finance	n/a	Charges	Total
Sales: NHS	PAY			£274.50				£274.50
Sales: Private	PAY			£60.00	£300.00		-£50.00	£310.00
Total				£334.50	£300.00		-£50.00	£584.50

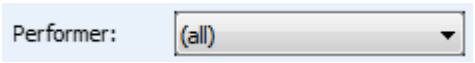
Mason, Linda								
Nominal	Type	Cash	Cheque	Card	Finance	n/a	Charges	Total
Sales: NHS	PAY	£35.00		£48.00				£83.00
Sales: Private	PAY			£45.00	£4,500.00		-£450.00	£4,095.00
Total		£35.00		£93.00	£4,500.00		-£450.00	£4,178.00

Riley, Elizabeth								
Nominal	Type	Cash	Cheque	Card	Finance	n/a	Charges	Total
Sales: Private	PAY	£35.00	£45.00					£80.00
Total		£35.00	£45.00					£80.00

Un-allocated								
Nominal	Type	Cash	Cheque	Card	Finance	n/a	Charges	Total
Un-allocated			£60.00					£60.00
Total			£60.00					£60.00

Totals								
Nominal	Type	Cash	Cheque	Card	Finance	n/a	Charges	Total
Un-allocated			£60.00					£60.00
Sales	PAY	£10.00		£25.00				£35.00
Sales: NHS	PAY	£35.00		£322.50				£357.50
Sales: Private	PAY	£35.00	£45.00	£105.00	£4,800.00		-£500.00	£4,485.00
Total		£80.00	£105.00	£452.50	£4,800.00		-£500.00	£4,937.50

By default this report will display payment and allocation information for every performer and payments allocated to the practice and any unallocated money. To narrow this down to view specific payments, use the dropdown at the top of the screen.



The second dropdown list allows you choose whether you want to display money entered in the time period only, or money carried forward from a previous time period or both.

Money carried forward will be payment that was taken in a previous time period but the patient's treatment or part of their treatment was not completed and charged until the time period the report was run so that money is carried forward and allocated in that time period.

For example, a patient is due to have £100 of treatment they have £40 of the treatment in January but they are not having the other £60 of treatment till February. The patient decides to pay the full £100 in January, this means £40 is allocated in January then the remaining £60 is unallocated until the treatment is completed in February. When the treatment is completed the £60 will then become allocated to February.

The summary tab in the **Payment & Allocation** report shows totals of how much has been allocated to each dentist, each scheme and by which method of payment.

Below is an example for Linda Mason.

Mason, Linda								
Nominal	**Type**	**Cash**	**Cheque**	**Card**	**Finance**	**n/a**	**Charges**	**Total**
Sales: NHS	PAY	£35.00		£48.00				£83.00
Sales: Private	PAY			£45.00	£4,500.00		-£450.00	£4,095.00
Total		£35.00		£93.00	£4,500.00		-£450.00	£4,178.00

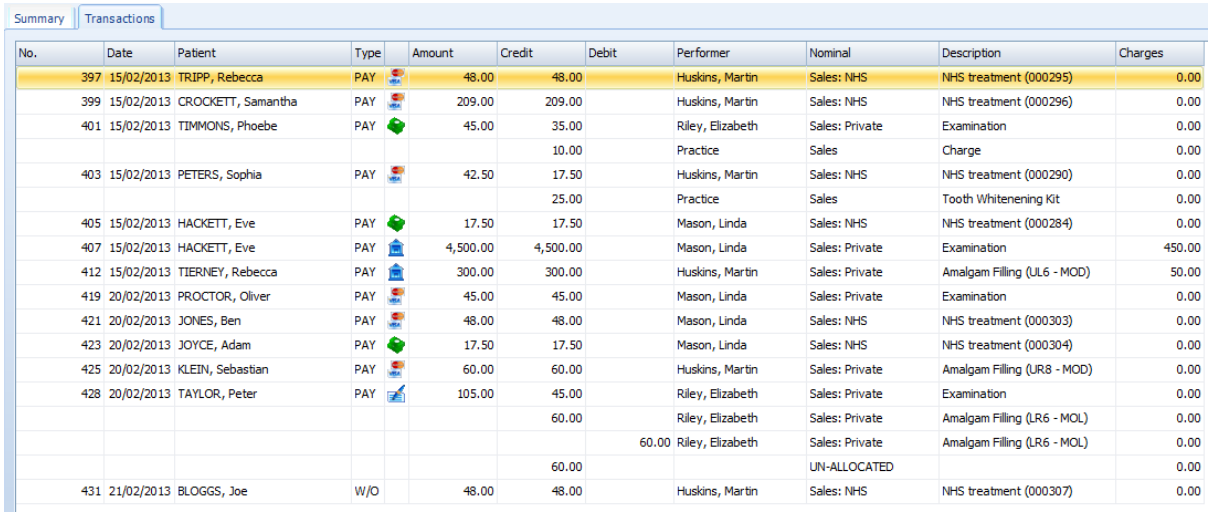
From the example above you can see that Linda Mason has carried out both NHS and private work during the time period of this particular payment and allocation report. You can see that she has been paid a total of £83 for NHS work, made up from £48 in card payments and £35 in cash payments. Her payments for private work are a lot greater with a total figure of £4,178, made up of £45 card and £4500 finance payment. However for private she has a minus figure in the **Charges** column. This figure is deducted from the private total. A reason for a minus figure in the charge column is a finance company admin charge for example.

At the bottom of the summary tab you have a grand totals section that combines all performers, practice and any unallocated payments.

Totals								
Nominal	**Type**	**Cash**	**Cheque**	**Card**	**Finance**	**n/a**	**Charges**	**Total**
Un-allocated			£60.00					£60.00
Sales	PAY	£10.00		£25.00				£35.00
Sales: NHS	W/O					£48.00		£48.00
Sales: NHS	PAY	£35.00		£322.50				£357.50
Sales: Private	PAY	£35.00	£45.00	£105.00	£4,800.00		-£500.00	£4,485.00
Total		£80.00	£105.00	£452.50	£4,800.00	£48.00	-£500.00	£4,985.50

Note: Money that appears in the N/A column are for things such as Write Offs (displayed as W/O) although these aren't payments they still show up in this report for audit purposes so you can monitor them.

The second tab within the Payment & Allocation report is **Transactions**. This allows you to view all transactions within the time period of your report.

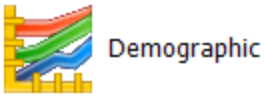


No.	Date	Patient	Type		Amount	Credit	Debit	Performer	Nominal	Description	Charges
397	15/02/2013	TRIPP, Rebecca	PAY		48.00	48.00		Huskins, Martin	Sales: NHS	NHS treatment (000295)	0.00
399	15/02/2013	CROCKETT, Samantha	PAY		209.00	209.00		Huskins, Martin	Sales: NHS	NHS treatment (000296)	0.00
401	15/02/2013	TIMMONS, Phoebe	PAY		45.00	35.00		Riley, Elizabeth	Sales: Private	Examination	0.00
						10.00		Practice	Sales	Charge	0.00
403	15/02/2013	PETERS, Sophia	PAY		42.50	17.50		Huskins, Martin	Sales: NHS	NHS treatment (000290)	0.00
						25.00		Practice	Sales	Tooth Whitenening Kit	0.00
405	15/02/2013	HACKETT, Eve	PAY		17.50	17.50		Mason, Linda	Sales: NHS	NHS treatment (000284)	0.00
407	15/02/2013	HACKETT, Eve	PAY		4,500.00	4,500.00		Mason, Linda	Sales: Private	Examination	450.00
412	15/02/2013	TIERNEY, Rebecca	PAY		300.00	300.00		Huskins, Martin	Sales: Private	Amalgam Filling (UL6 - MOD)	50.00
419	20/02/2013	PROCTOR, Oliver	PAY		45.00	45.00		Mason, Linda	Sales: Private	Examination	0.00
421	20/02/2013	JONES, Ben	PAY		48.00	48.00		Mason, Linda	Sales: NHS	NHS treatment (000303)	0.00
423	20/02/2013	JOYCE, Adam	PAY		17.50	17.50		Mason, Linda	Sales: NHS	NHS treatment (000304)	0.00
425	20/02/2013	KLEIN, Sebastian	PAY		60.00	60.00		Huskins, Martin	Sales: Private	Amalgam Filling (UR8 - MOD)	0.00
428	20/02/2013	TAYLOR, Peter	PAY		105.00	45.00		Riley, Elizabeth	Sales: Private	Examination	0.00
						60.00		Riley, Elizabeth	Sales: Private	Amalgam Filling (LR6 - MOL)	0.00
							60.00	Riley, Elizabeth	Sales: Private	Amalgam Filling (LR6 - MOL)	0.00
						60.00			UN-ALLOCATED		0.00
431	21/02/2013	BLOGGS, Joe	W/O		48.00	48.00		Huskins, Martin	Sales: NHS	NHS treatment (000307)	0.00

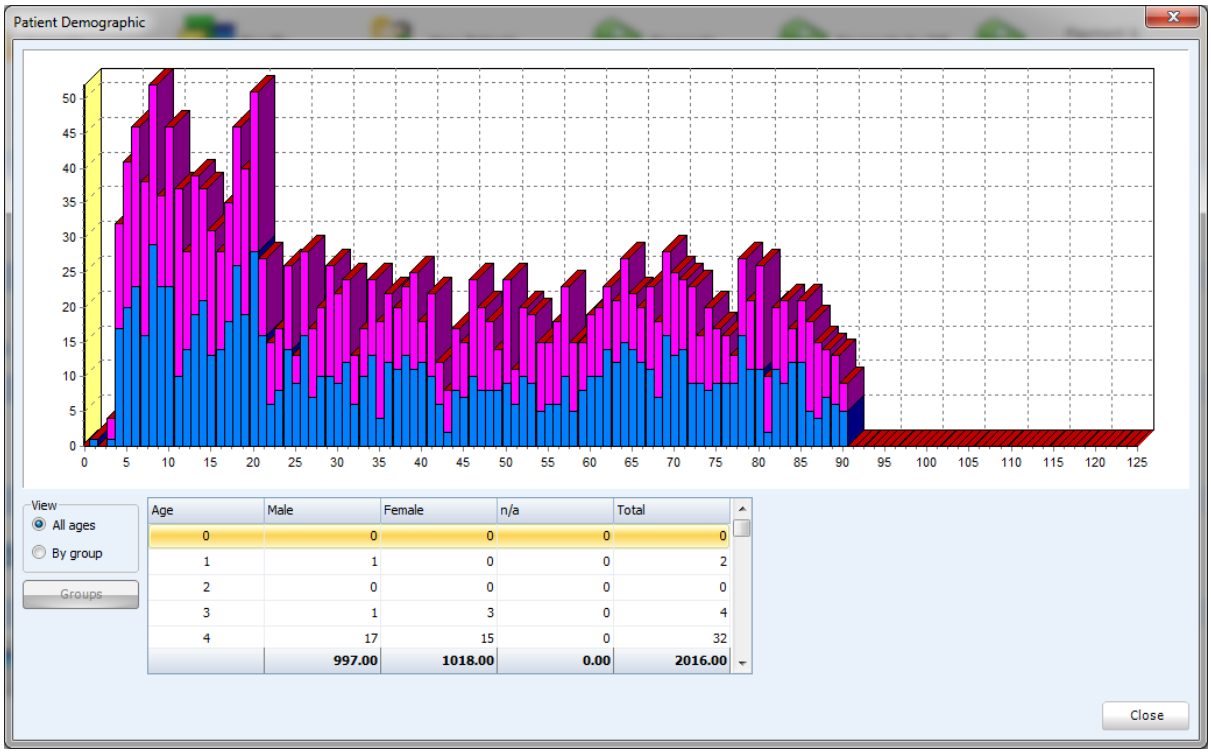
From this tab you can see whether the transaction type, amount, whether its credit or debit who the transaction is to (performer or practice) also the nominal, description and any charges associated with the transaction.

Demographic

The demographic report is used to view how many patients you have in certain age ranges and the split between genders. To access this report, click on the **Demographic** button within the patient area of the reporting screen.



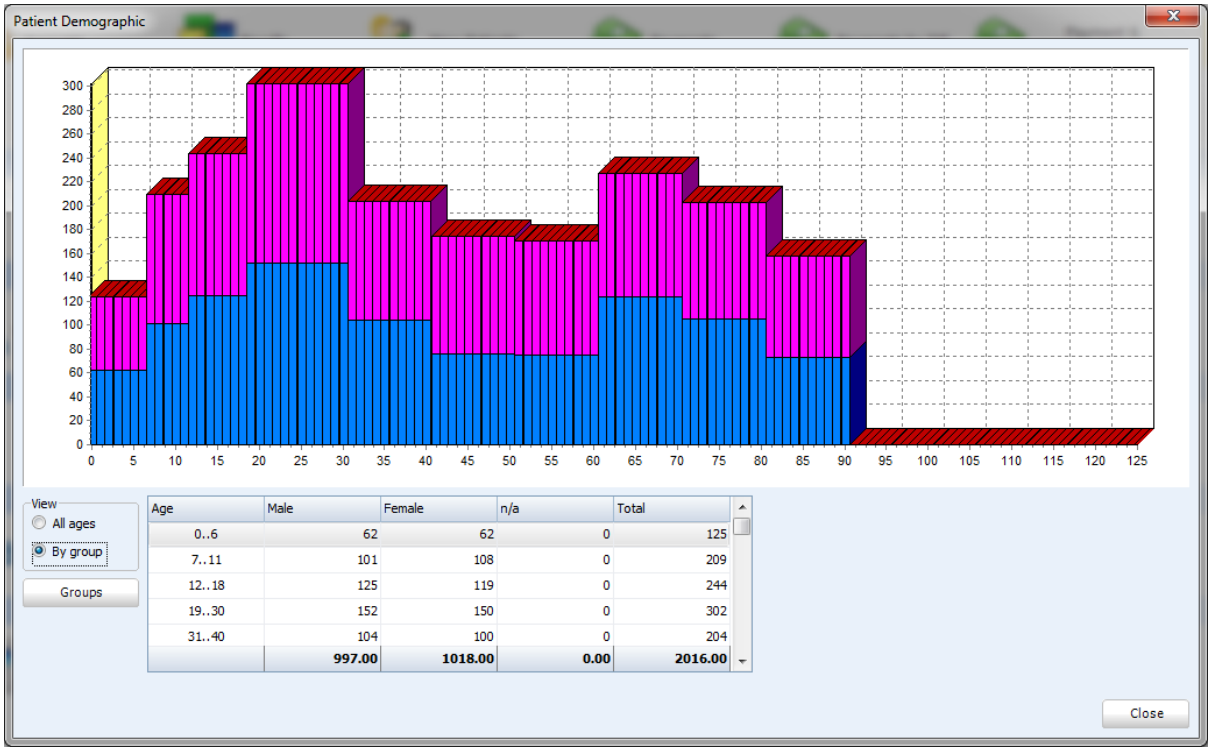
The **Patient Demographic** report will then show.



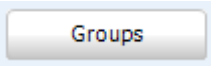
You can see that you have a chart which gives you a visual representation of the amount of patients for each age. The pink part of each bar represents female and the blue represents male. You also have a table which gives you the same information as the chart.

You have two different options of viewing, you can view all ages or you can view by group. To change view, select from the **View** section to the left of the table.

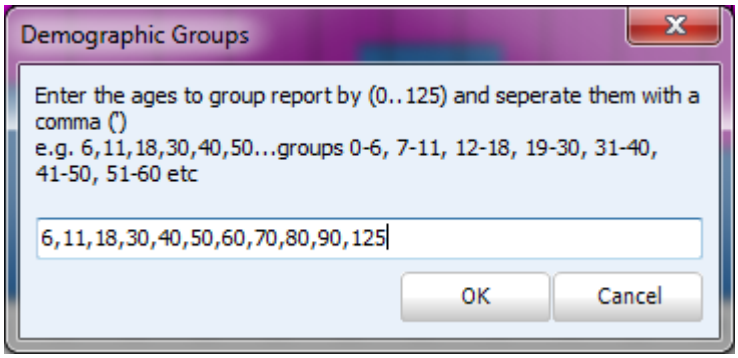
By Group allows you to view the demographic in age ranges rather than each individual age.



You can choose your age ranges by using the **Groups** button.



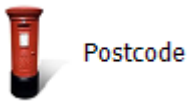
You will then be presented with the **Demographic Groups** window.



Follow the instructions then click **OK** to view your new date ranges.

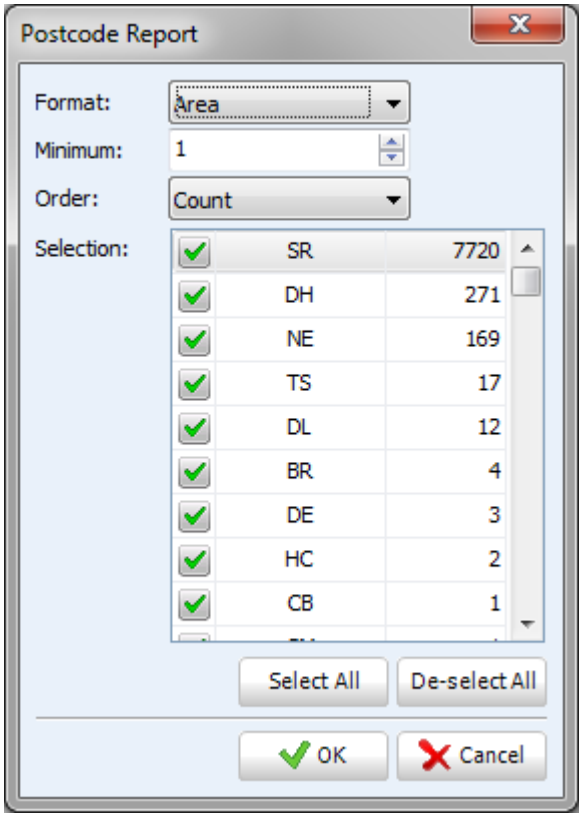
Postcode

The postcode report is designed to allow you to graphically view where all your patients live. To access the postcode report, click on the button shown below.



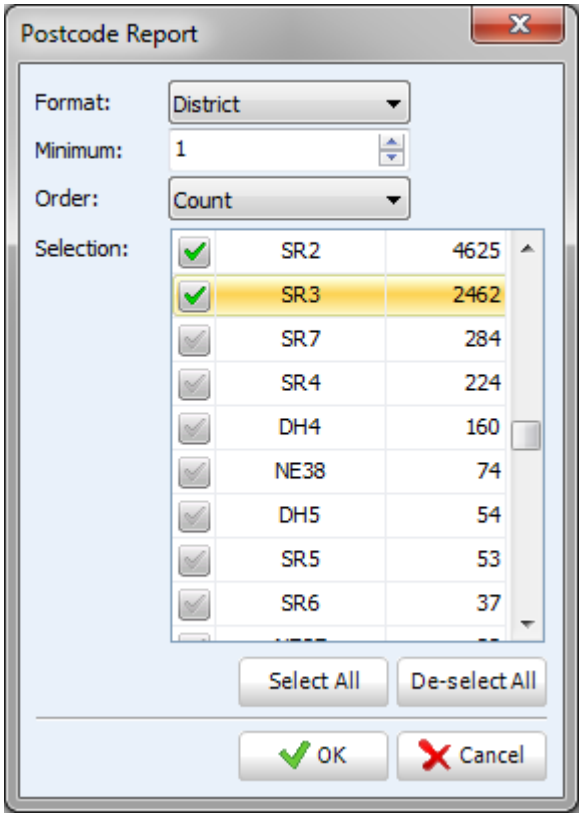
After entering the **Postcode** report screen, click on **Report** in the top left hand corner of the screen.

You will then be presented with the **Postcode Report** Screen.

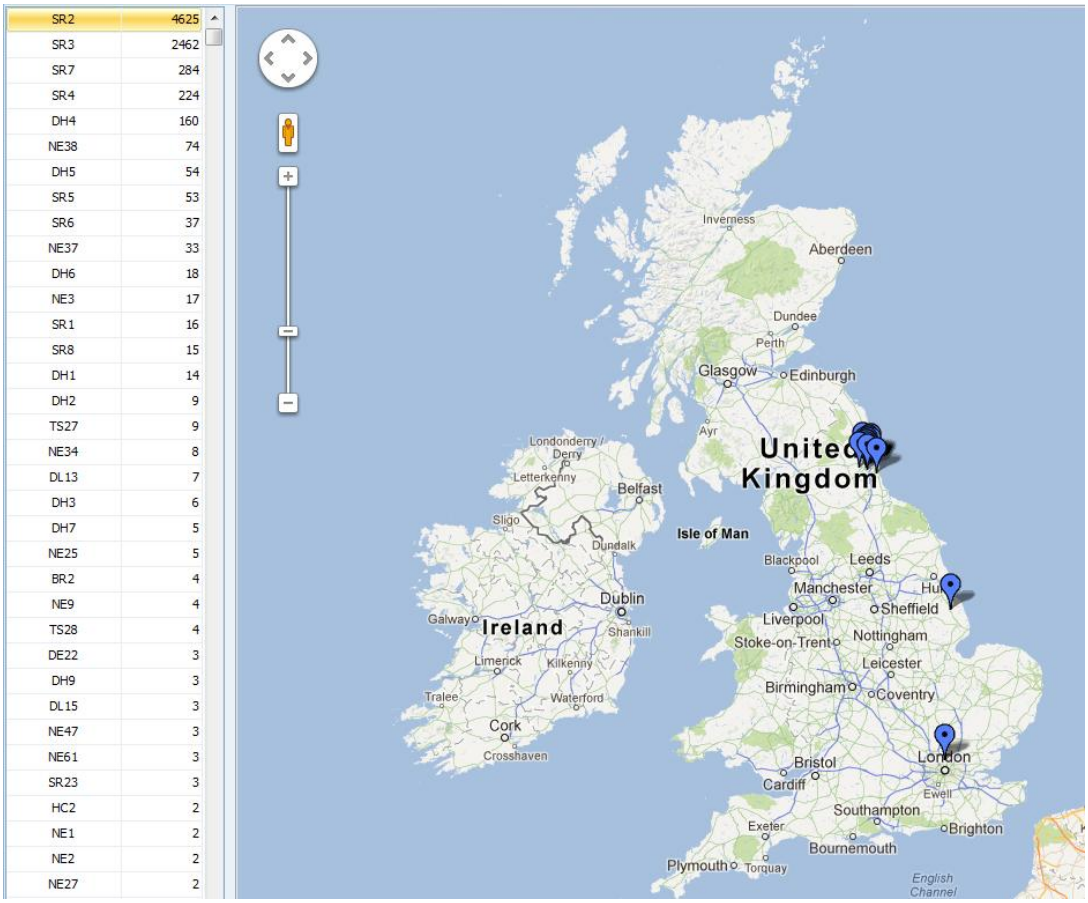


From this screen you can choose how specific you wish your report to be. From the format dropdown list you can select whether you wish to view by Area, District, Sector, Group or Unit. You can then choose the order by count (highest at the top) or by postcode (alphabetical order).

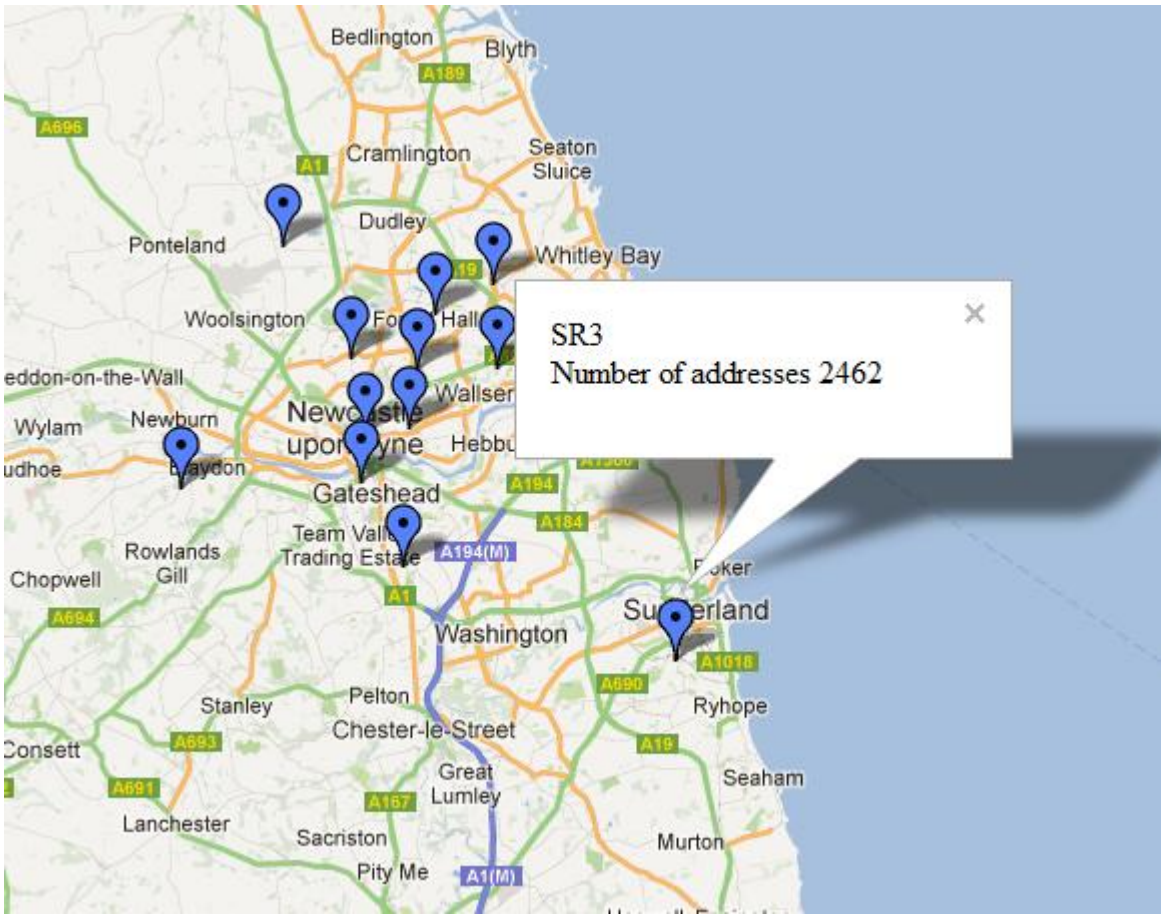
After choosing your format the Selection section of the window will be updated.



You can then de-select any district you do not wish to include in your report. Once you are happy with your selection click **OK** to enter your report.



In the left hand column you will see total amount for each district. On the graphic you are able to zoom into specific areas. To zoom, either scroll on your mouse or use the bar on the screen.



If you click on one of the markers it will show you the amount of patients that live in this district. In the example above we can see that 2462 patient addresses have been picked up in this district.

Treatment

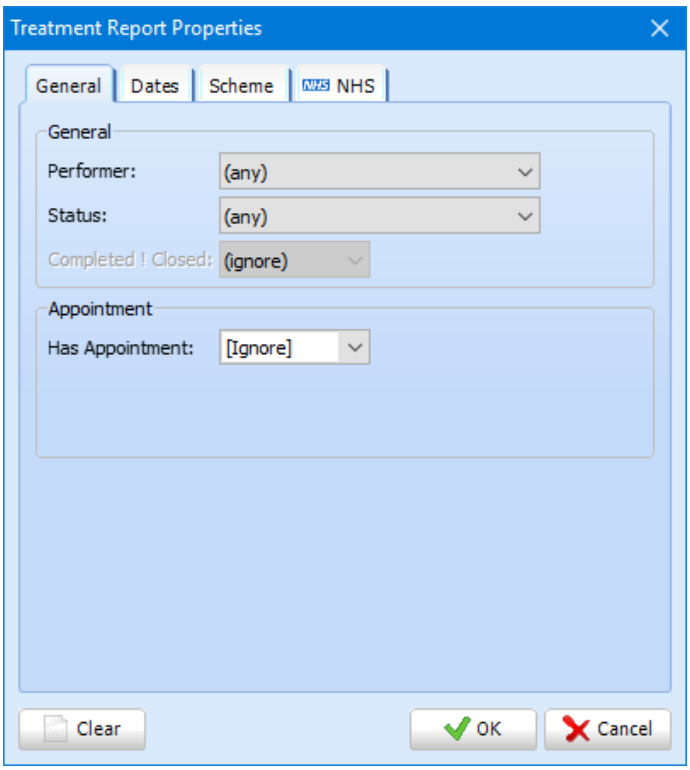
Forms

The forms report is for generating information about forms within a certain time period. It is especially useful for monitoring incomplete treatment form so you can target patients to get them back in to have their treatment completed.

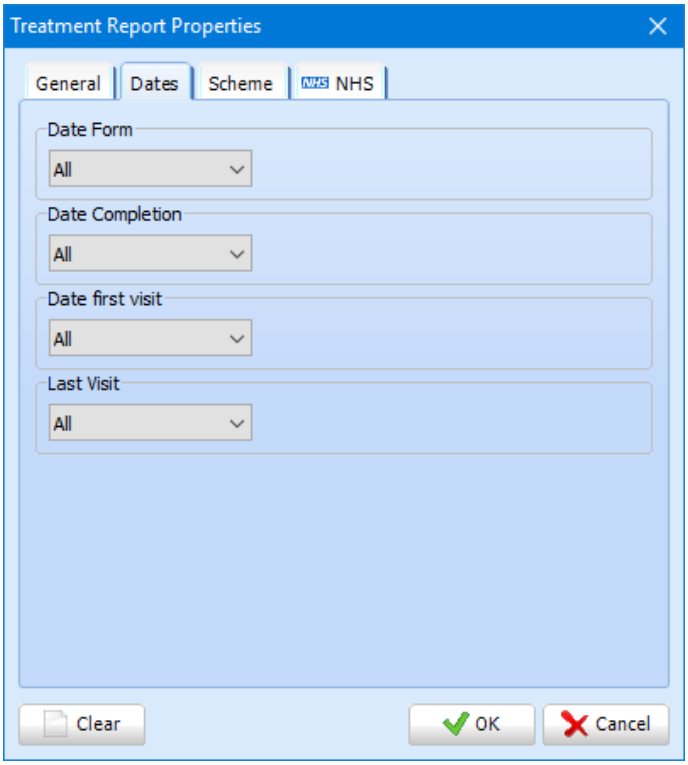
To access this report clicks on the **Forms** button under the treatment heading.

After entering the treatment forms **Report** click report in the top left hand corner of the screen.

You will then be presented with **Treatment Report Properties** window.

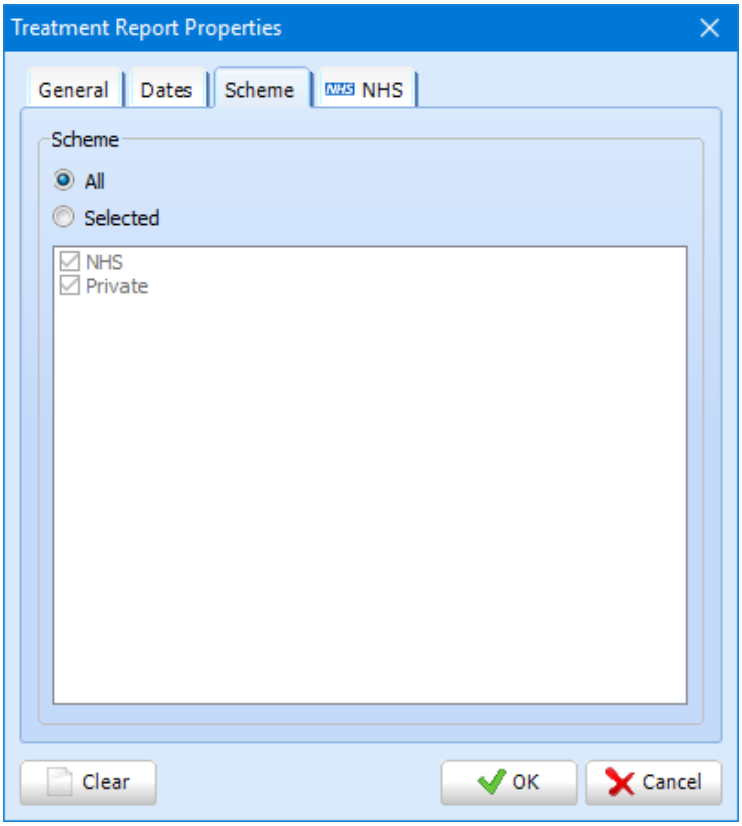


From the **General** tab you can specify a specific performer or view all. **Status** allows you to show forms that are either complete or incomplete. You can also select (any) to view either. Finally the **General** allows you to choose whether your report includes patients that have an appointment booked in the future.



The **Date Form** tab relates to when the form was originally created. **Date Completion** is for when the form was completed, meaning this option will not be relevant if you are searching for incomplete treatment forms. **Date first** visit refers to the date the patient first attended the practice. **Last Visit** refers to when the patient was most recently at the practice.

The final tab is **Scheme**.



To select a specific scheme or multiple schemes, click **Selected** then remove ticks next to any scheme checkbox you don't wish to include in your report.

Click **OK** to generate this report. It can then be exported as a CSV file if required. Click on the **Export** button at the top of the screen to do so.

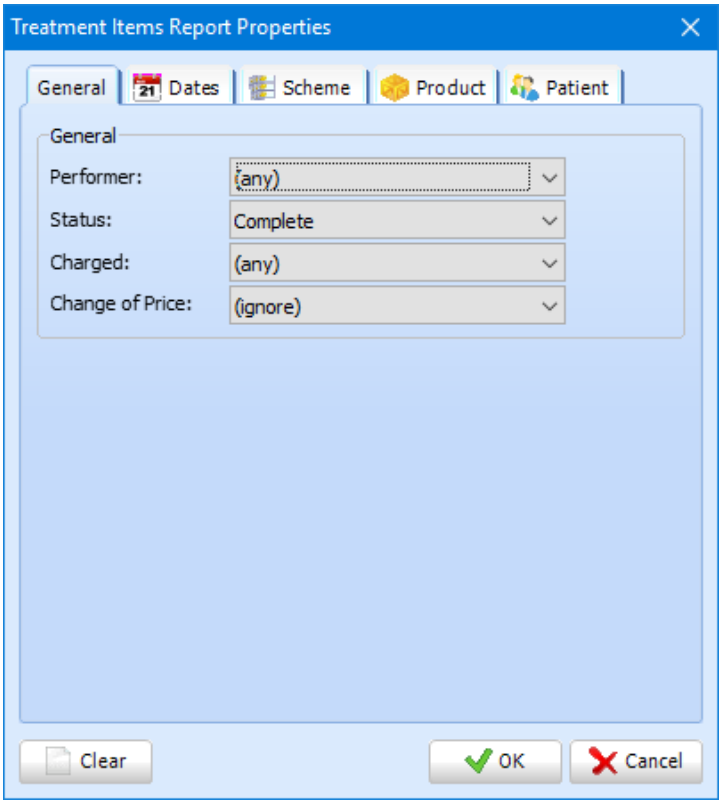
Items

The **Treatment Items** report is the second report in the treatments section of the reporting screen. This is very similar to the treatment forms report but is specific to treatment items rather than forms.

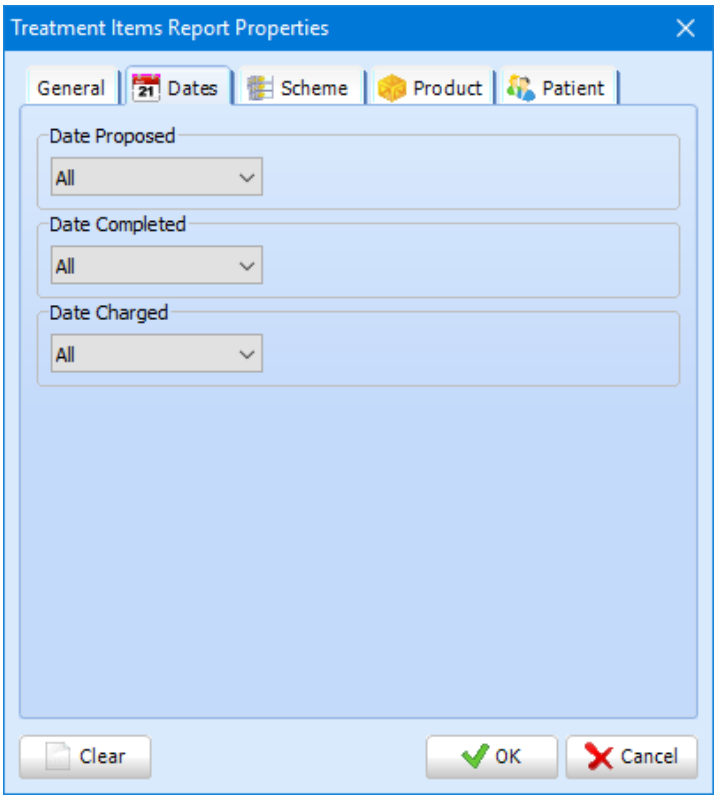
To access this report, click on the **Items** button.

Now you are in the treatment items report screen click on **Report** in the top left hand corner of the screen.

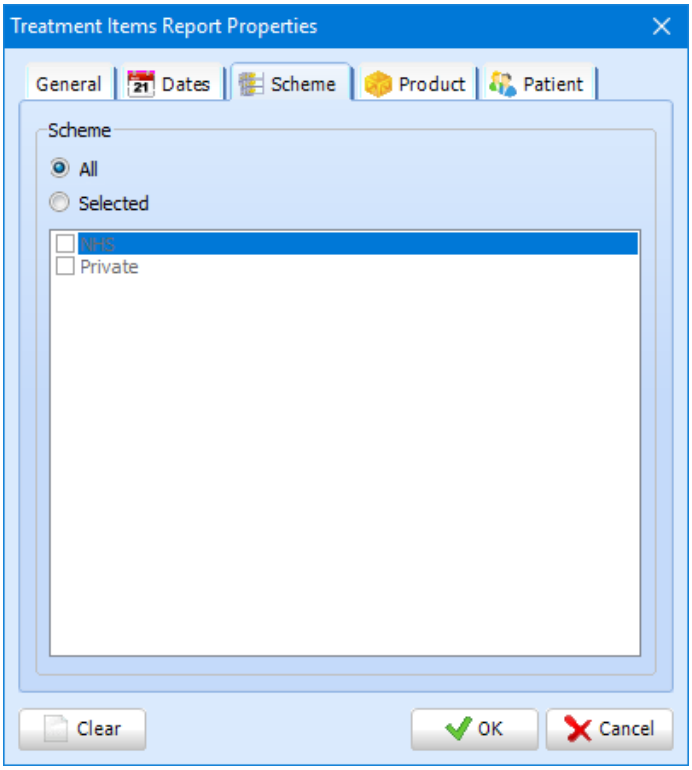
You will now be presented with the **Treatment Items Report Properties** window.



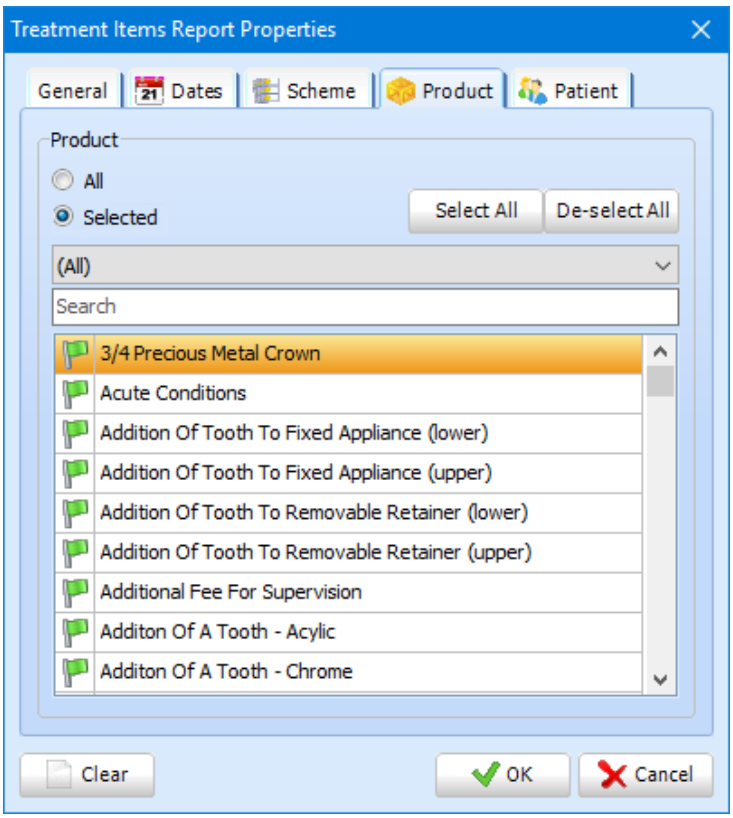
Under **General** you can select a performer or leave as **(any)** to view all. You can also choose whether you wish to report on complete or incomplete treatment items.



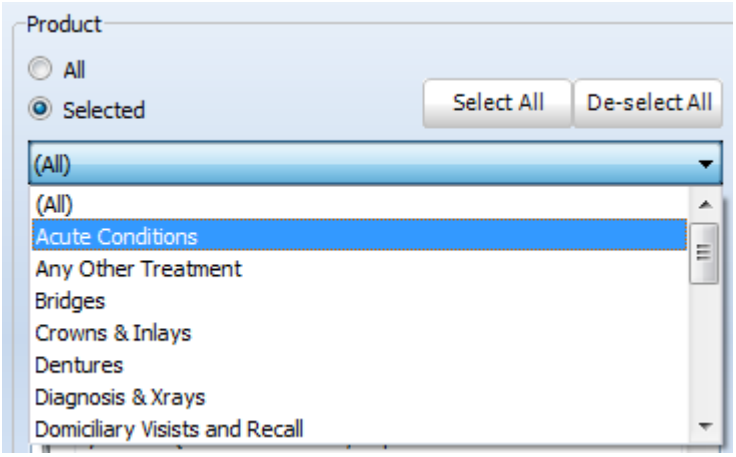
Under the **Dates** tab the first option is when the treatment item was added to a treatment form. You can also report on the date the treatment item was marked as completed on the treatment form as well as when it was marked as charged.



Within the **Scheme** tab, you can select specific schemes to show in your report by clicking **Selected**. The **Patient** tab would show patients who are registered under the scheme whereas **Scheme** would be the item scheme.

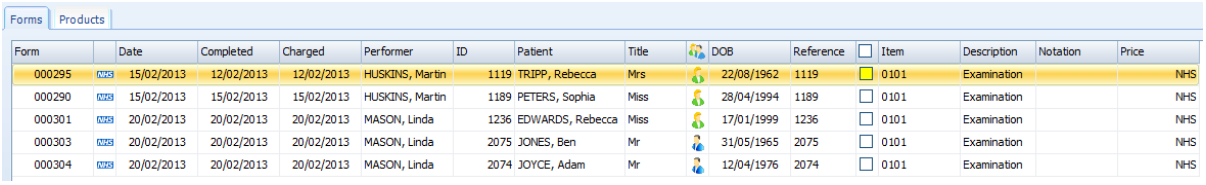


Any item with a green flag next to it will be included in the report. You can use the **Select All** and **De-select All** buttons at the top of the window. You can also search by item category using the dropdown list.



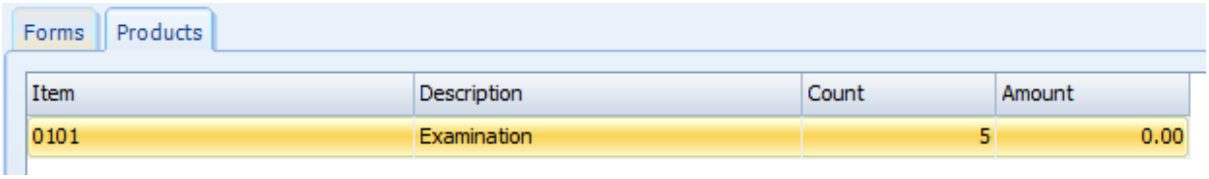
Once you have selected the items you wish to include in your report click **OK** to generate the results.

The example below shows completed NHS examinations in a particular time period.



The **Forms** tab list the forms that the particular treatment items feature on. You can view basic patient information on this screen. Proposed, completed and charged dates are also show. You can also see which scheme the treatment form belongs to and which performer.

The next tab is **Products** which gives you a total number of each treatment item you have specified earlier.



From this particular report we can see there have been 5 examinations completed.

This report is exportable. To do so, click the **Export** button, then choose the destination you wish to save it.

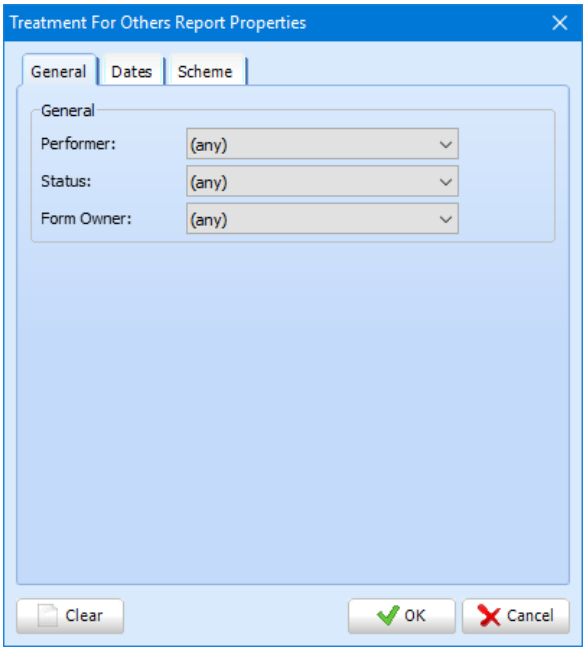
For Others

A treatment form belongs to a single performer within the dental software however items on the form can be created for or created to other users. To report on this function you enter the main reports section of the program.

Click on the **For Others** button under the treatment reports section.

Now click on the **Report** button.

Select the performer you wish to see data relating to (or select **(any)** to view all). This is the performer who owns items another performer's treatment form. The final tab is **Schemes**; within here you can select particular schemes to report against

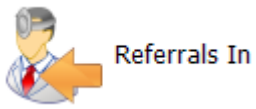


A list will be displayed showing all the items owned by that performer and who the work has been done on the behalf of.

Referrals

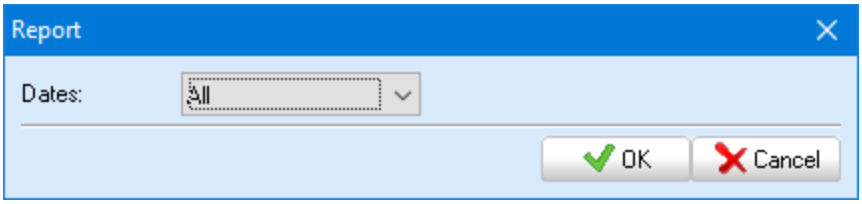
Referrals In

Referrals In is a report that is used to track the amount of inbound referrals that have been received. To access this report click on the **Referrals In** button within the **Referrals** section of the reporting screen.

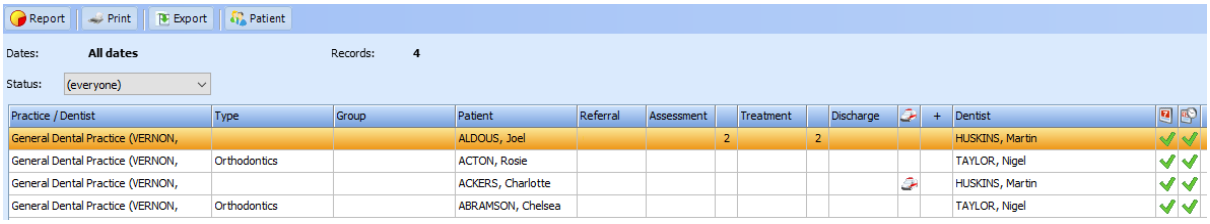


Once you have entered the Referrals In report screen click on **Report** in the top left hand corner of the screen.

You will then be presented with the **Select Dates** window.



Select your date range then click **OK**.



From the report generated you will see a list of the patients that have been referred to your practice within the selected time period. The report also shows any assessment, treatment and discharge dates that have been entered. You can also see whether the referral was urgent or routine. If it was urgent there will be the ambulance icon on that particular referral.

At the top of the screen you can view the total amount of referrals.

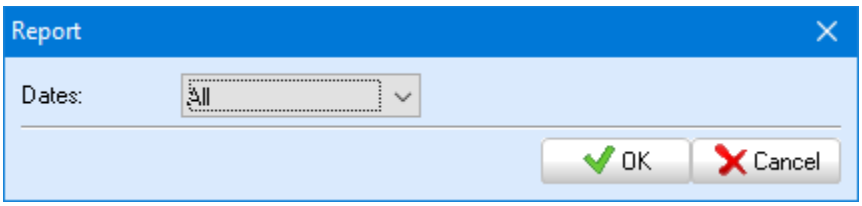
Referrals Out

The Referrals Out report is designed to view any outbound referrals made in a particular time period.

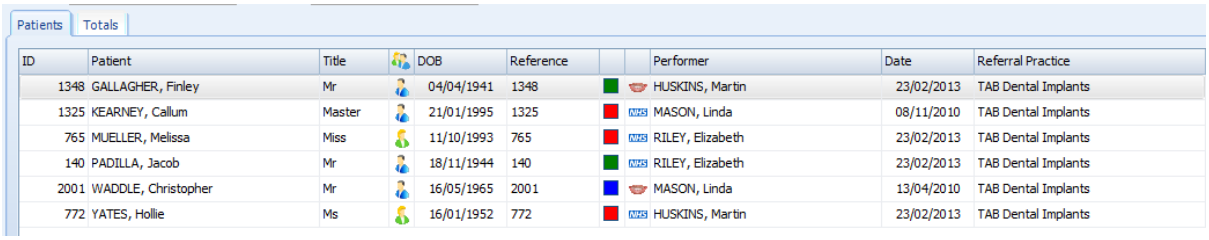
To access this report click on the **Referrals Out** button, within the **Referrals** section of the reporting screen.

Once you have click on the icon click on Report in the top left hand corner of the screen.

You will now be presented with the **Select Dates** window.

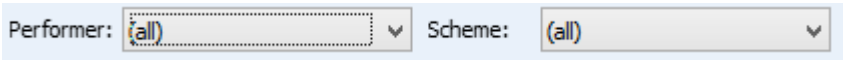


Select your desired date range for your report then click OK.

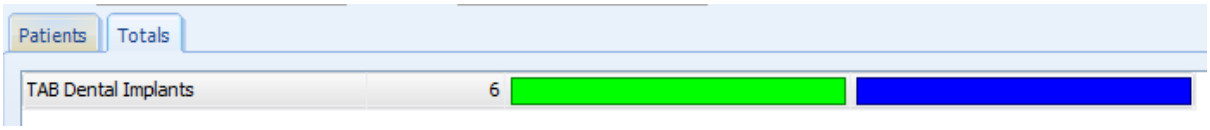


The reports opens in the **Patient** tab, this displays patients that have had an outbound referral. The report shows the date of referral and the referral practice.

You can filter your report down by performer and scheme by using the dropdown lists at the top of the screen.



The second tab is the **Totals** tab. This shows the total amount of referrals to each referral practice.



NHS

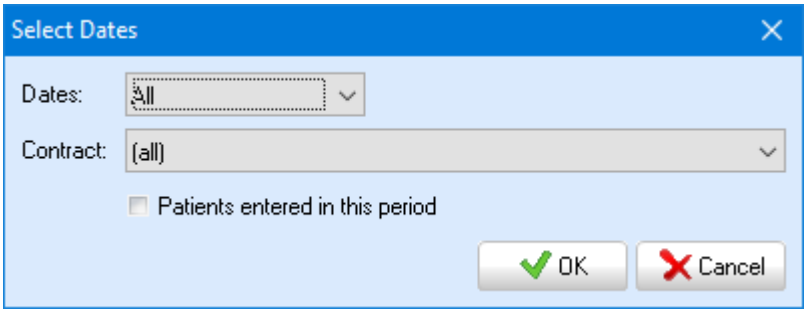
The NHS section of the report screen allows you to monitor UDA activity over certain periods of time. There are 3 reports available in this section, each provide different information regarding NHS transmissions.

UDA

The **UDA** report allows you to view information regarding UDA activity within a certain time period. To access this report click on the UDA icon within the NHS section of the reporting screen.

After clicking on the **UDA** button, click **Report** in the top left hand corner of the screen.

You will now be presented with the following window.



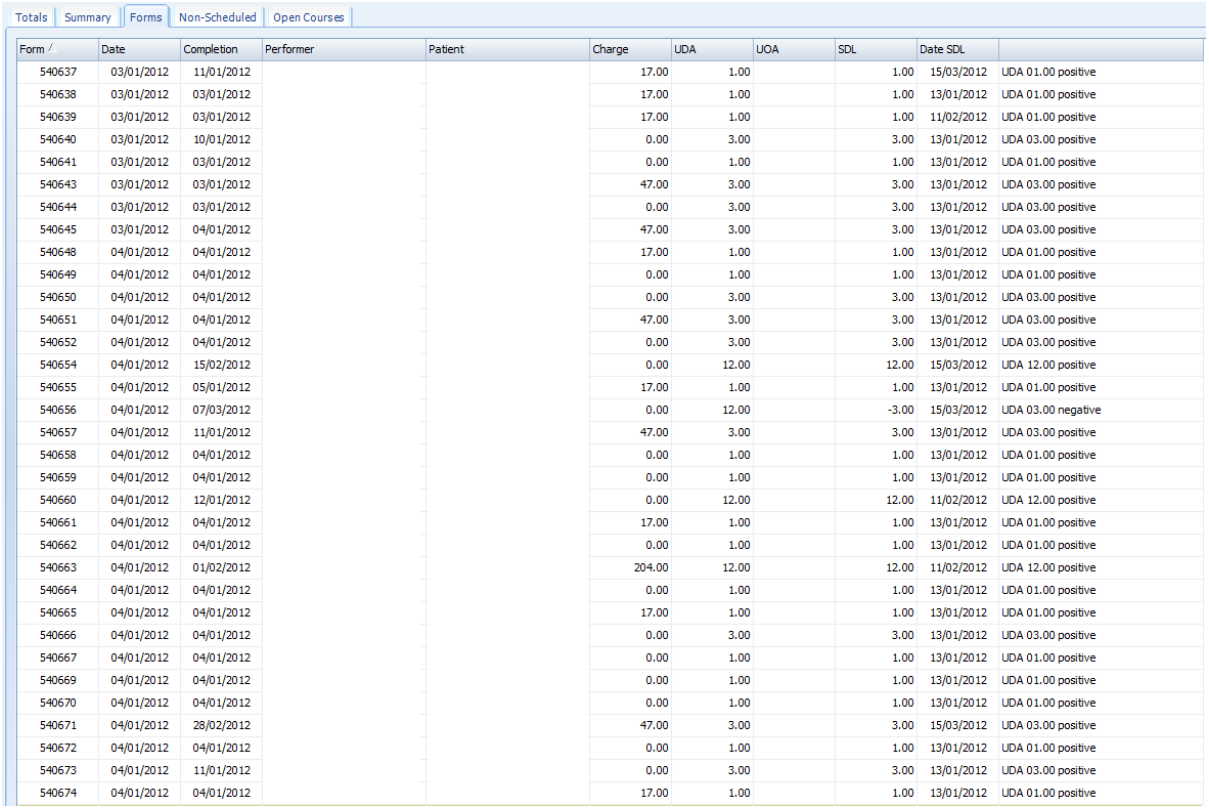
Select the date range you wish to view by using the **Dates** dropdown list. If you operate more than one contract at your practice you can select this from the **Contract** dropdown list. Click **OK** to generate your report.

The report will open in the **Totals** tab. This displays the total UDA's, UOA's and SDL's per month in the chosen time period for each performer.

Month	Performer	UDA	UOA	SDL
11/2017	Total	81.00	0.00	0.00
11/2017	HUSKINS, Martin	73.00	0.00	0.00
11/2017	TAYLOR, Nigel	8.00	0.00	0.00
12/2017	Total	187.00	0.00	0.00
12/2017	HUSKINS, Martin	165.00	0.00	0.00
12/2017	TAYLOR, Nigel	22.00	0.00	0.00
01/2018	Total	181.00	0.00	0.00
01/2018	HUSKINS, Martin	156.00	0.00	0.00
01/2018	TAYLOR, Nigel	25.00	0.00	0.00
02/2018	Total	66.00	0.00	0.00
02/2018	HUSKINS, Martin	43.00	0.00	0.00
02/2018	TAYLOR, Nigel	23.00	0.00	0.00
03/2018	Total	130.00	0.00	0.00
03/2018	HUSKINS, Martin	104.00	0.00	0.00
03/2018	TAYLOR, Nigel	26.00	0.00	0.00
04/2018	Total	152.00	0.00	0.00
04/2018	HUSKINS, Martin	133.00	0.00	0.00
04/2018	TAYLOR, Nigel	19.00	0.00	0.00
05/2018	Total	203.00	0.00	0.00
05/2018	HUSKINS, Martin	153.00	0.00	0.00
05/2018	TAYLOR, Nigel	50.00	0.00	0.00
06/2018	Total	265.00	0.00	0.00
06/2018	HUSKINS, Martin	183.00	0.00	0.00
06/2018	TAYLOR, Nigel	82.00	0.00	0.00
07/2018	Total	237.00	0.00	0.00
07/2018	HUSKINS, Martin	154.00	0.00	0.00
07/2018	TAYLOR, Nigel	83.00	0.00	0.00
08/2018	Total	205.00	0.00	0.00
08/2018	HUSKINS, Martin	131.00	0.00	0.00
08/2018	TAYLOR, Nigel	74.00	0.00	0.00

The next tab is the **Summary** tab which displays a breakdown of the information shown in the **Totals** tab. From this tab you can gather information such as total amount of activity per band, amount of treatment completed under guarantee and activity completed as continuation. This tab also presents totals for specific treatment items, i.e. examinations, dentures completed within the particular time period. You can also gather new patient information at the bottom of this tab.

Forms is the next tab and as you would expect from the name of this tab it displays all treatment forms that were transmitted in the chosen time period.

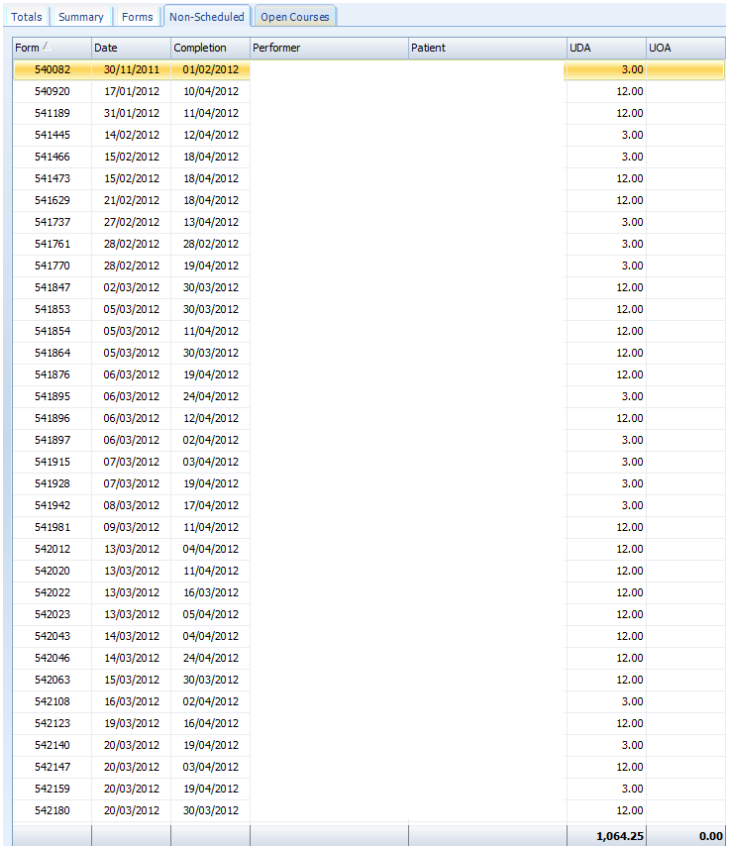


Totals | Summary | Forms | Non-Scheduled | Open Courses

Form	Date	Completion	Performer	Patient	Charge	UDA	UOA	SDL	Date SDL	
540637	03/01/2012	11/01/2012			17.00	1.00		1.00	15/03/2012	UDA 01.00 positive
540638	03/01/2012	03/01/2012			17.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540639	03/01/2012	03/01/2012			17.00	1.00		1.00	11/02/2012	UDA 01.00 positive
540640	03/01/2012	10/01/2012			0.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540641	03/01/2012	03/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540643	03/01/2012	03/01/2012			47.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540644	03/01/2012	03/01/2012			0.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540645	03/01/2012	04/01/2012			47.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540648	04/01/2012	04/01/2012			17.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540649	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540650	04/01/2012	04/01/2012			0.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540651	04/01/2012	04/01/2012			47.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540652	04/01/2012	04/01/2012			0.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540654	04/01/2012	15/02/2012			0.00	12.00		12.00	15/03/2012	UDA 12.00 positive
540655	04/01/2012	05/01/2012			17.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540656	04/01/2012	07/03/2012			0.00	12.00		-3.00	15/03/2012	UDA 03.00 negative
540657	04/01/2012	11/01/2012			47.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540658	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540659	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540660	04/01/2012	12/01/2012			0.00	12.00		12.00	11/02/2012	UDA 12.00 positive
540661	04/01/2012	04/01/2012			17.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540662	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540663	04/01/2012	01/02/2012			204.00	12.00		12.00	11/02/2012	UDA 12.00 positive
540664	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540665	04/01/2012	04/01/2012			17.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540666	04/01/2012	04/01/2012			0.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540667	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540669	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540670	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540671	04/01/2012	28/02/2012			47.00	3.00		3.00	15/03/2012	UDA 03.00 positive
540672	04/01/2012	04/01/2012			0.00	1.00		1.00	13/01/2012	UDA 01.00 positive
540673	04/01/2012	11/01/2012			0.00	3.00		3.00	13/01/2012	UDA 03.00 positive
540674	04/01/2012	04/01/2012			17.00	1.00		1.00	13/01/2012	UDA 01.00 positive

The **Forms** tab displays the form number, date it was created, date of completion, the performer, and patient, patient charge, the UDA value of the form, the schedule value, and the date of the schedule.

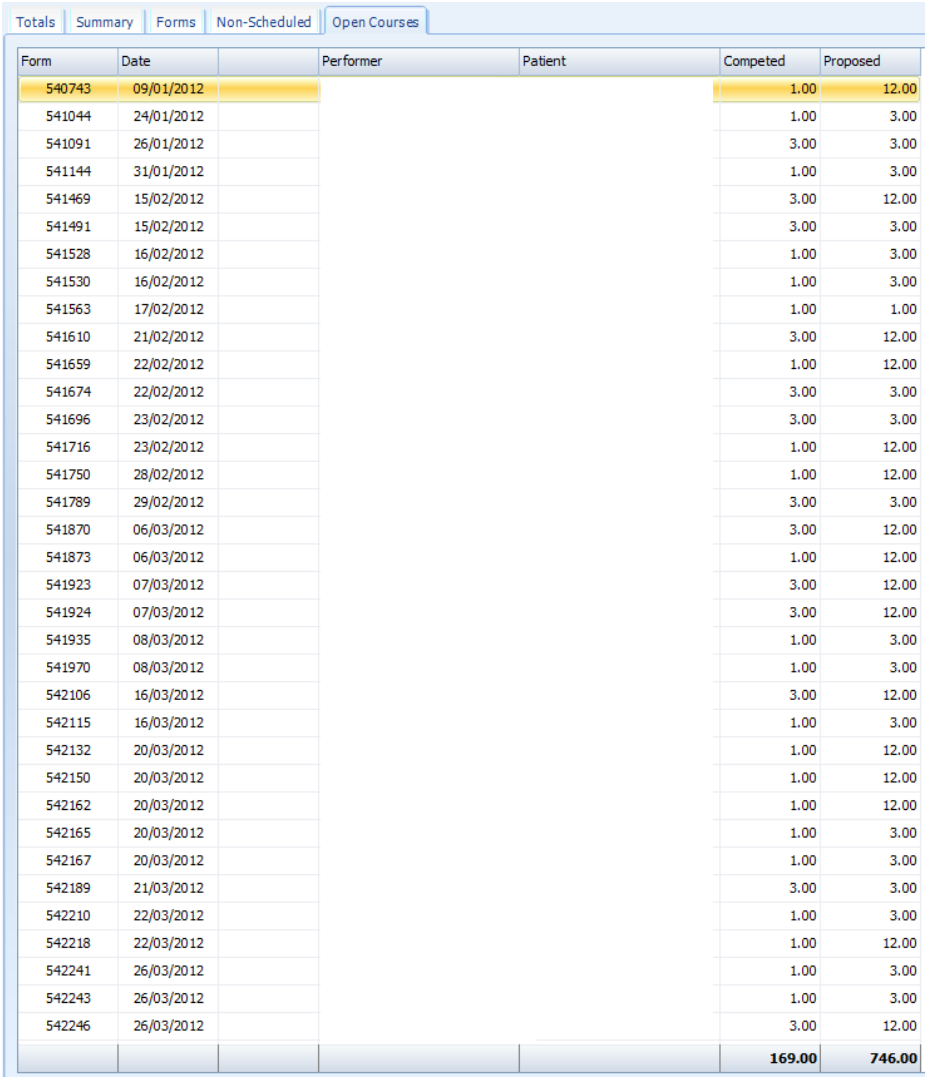
The fourth tab is **Non-Scheduled**. This tab displays all forms that were transmitted in the given time period but have not been included in the schedule. This may be for a number of reasons, such as invalid PIN number, forms already sent etc.



Totals | Summary | Forms | Non-Scheduled | Open Courses

Form	Date	Completion	Performer	Patient	UDA	UOA
540082	30/11/2011	01/02/2012			3.00	
540920	17/01/2012	10/04/2012			12.00	
541189	31/01/2012	11/04/2012			12.00	
541445	14/02/2012	12/04/2012			3.00	
541466	15/02/2012	18/04/2012			3.00	
541473	15/02/2012	18/04/2012			12.00	
541629	21/02/2012	18/04/2012			12.00	
541737	27/02/2012	13/04/2012			3.00	
541761	28/02/2012	28/02/2012			3.00	
541770	28/02/2012	19/04/2012			3.00	
541847	02/03/2012	30/03/2012			12.00	
541853	05/03/2012	30/03/2012			12.00	
541854	05/03/2012	11/04/2012			12.00	
541864	05/03/2012	30/03/2012			12.00	
541876	06/03/2012	19/04/2012			12.00	
541895	06/03/2012	24/04/2012			3.00	
541896	06/03/2012	12/04/2012			12.00	
541897	06/03/2012	02/04/2012			3.00	
541915	07/03/2012	03/04/2012			3.00	
541928	07/03/2012	19/04/2012			3.00	
541942	08/03/2012	17/04/2012			3.00	
541981	09/03/2012	11/04/2012			12.00	
542012	13/03/2012	04/04/2012			12.00	
542020	13/03/2012	11/04/2012			12.00	
542022	13/03/2012	16/03/2012			12.00	
542023	13/03/2012	05/04/2012			12.00	
542043	14/03/2012	04/04/2012			12.00	
542046	14/03/2012	24/04/2012			12.00	
542063	15/03/2012	30/03/2012			12.00	
542108	16/03/2012	02/04/2012			3.00	
542123	19/03/2012	16/04/2012			12.00	
542140	20/03/2012	19/04/2012			3.00	
542147	20/03/2012	03/04/2012			12.00	
542159	20/03/2012	19/04/2012			3.00	
542180	20/03/2012	30/03/2012			12.00	
					1,064.25	**0.00**

The final tab in the UDA report is the **Open Courses** tab. This tab displays all treatment forms that were created within the given time period but have not been transmitted.



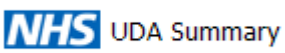
Totals | Summary | Forms | Non-Scheduled | Open Courses

Form	Date		Performer	Patient	Competed	Proposed
540743	09/01/2012				1.00	12.00
541044	24/01/2012				1.00	3.00
541091	26/01/2012				3.00	3.00
541144	31/01/2012				1.00	3.00
541469	15/02/2012				3.00	12.00
541491	15/02/2012				3.00	3.00
541528	16/02/2012				1.00	3.00
541530	16/02/2012				1.00	3.00
541563	17/02/2012				1.00	1.00
541610	21/02/2012				3.00	12.00
541659	22/02/2012				1.00	12.00
541674	22/02/2012				3.00	3.00
541696	23/02/2012				3.00	3.00
541716	23/02/2012				1.00	12.00
541750	28/02/2012				1.00	12.00
541789	29/02/2012				3.00	3.00
541870	06/03/2012				3.00	12.00
541873	06/03/2012				1.00	12.00
541923	07/03/2012				3.00	12.00
541924	07/03/2012				3.00	12.00
541935	08/03/2012				1.00	3.00
541970	08/03/2012				1.00	3.00
542106	16/03/2012				3.00	12.00
542115	16/03/2012				1.00	3.00
542132	20/03/2012				1.00	12.00
542150	20/03/2012				1.00	12.00
542162	20/03/2012				1.00	12.00
542165	20/03/2012				1.00	3.00
542167	20/03/2012				1.00	3.00
542189	21/03/2012				3.00	3.00
542210	22/03/2012				1.00	3.00
542218	22/03/2012				1.00	12.00
542241	26/03/2012				1.00	3.00
542243	26/03/2012				1.00	3.00
542246	26/03/2012				3.00	12.00
					169.00	**746.00**

This tab shows the proposed UDA value and the completed value on the far right for each treatment form. You can double click any row to open the treatment form.

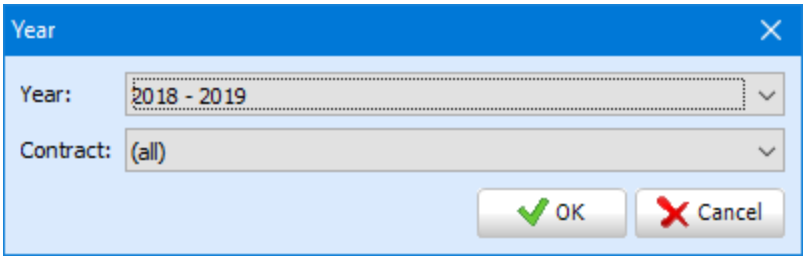
UDA Summary

The second report in the NHS section of the reporting screen is the **UDA Summary** report. This report is useful for getting weekly and monthly totals. To access this report, click on the **UDA Summary** button.



Now click the **Report** button in the top left hand corner of the screen.

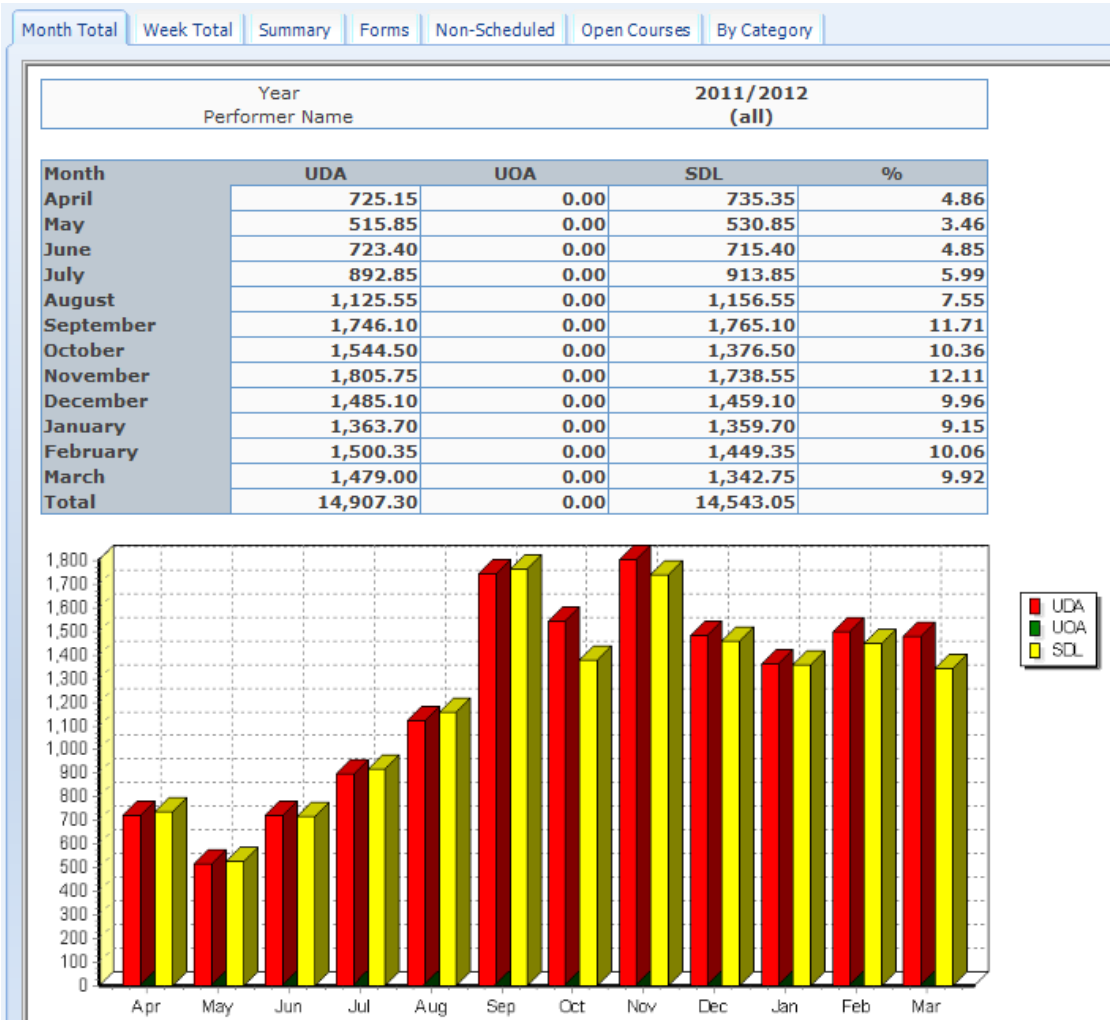
You will then be presented with the following window.



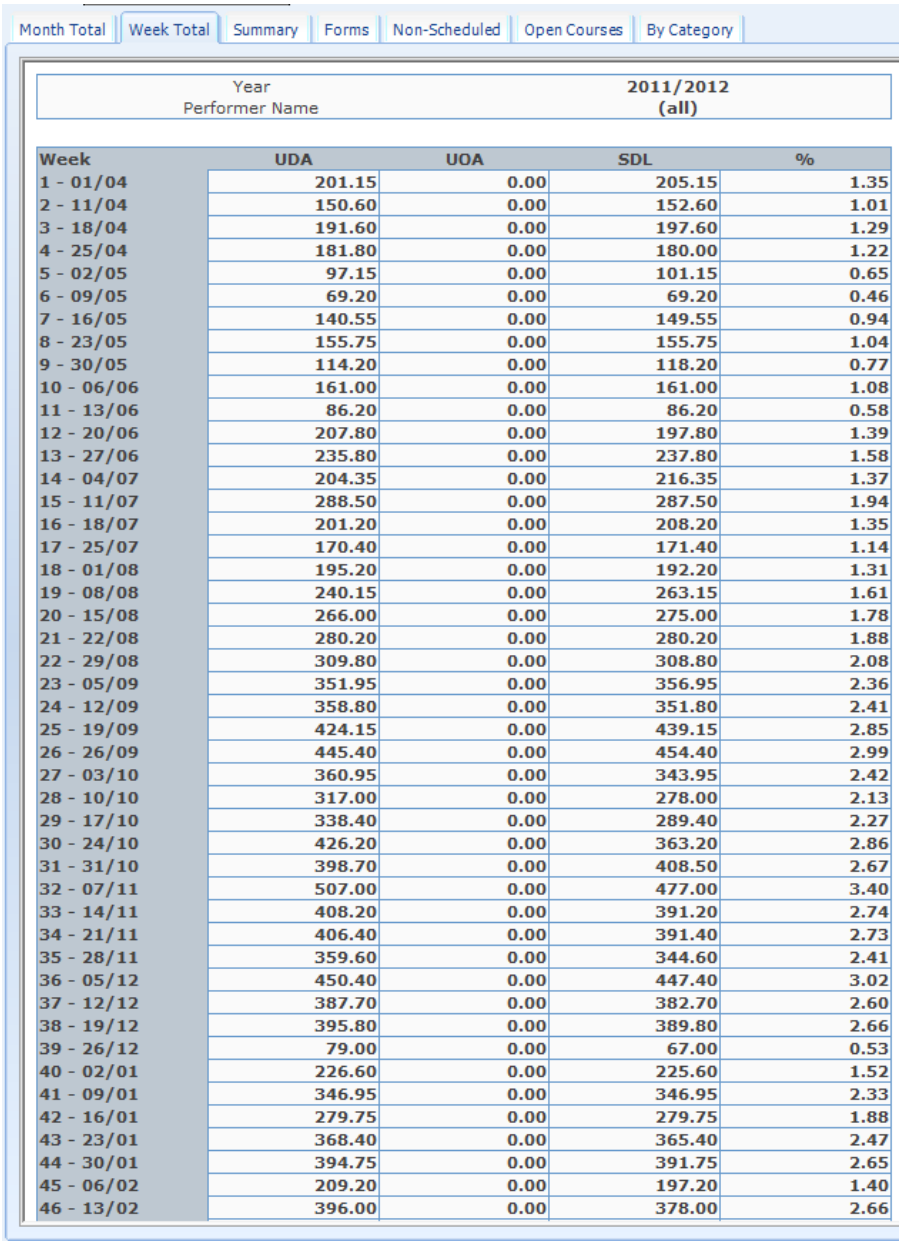
Select the financial year you wish to view from the **Year** dropdown list. Secondly select which contract you wish to view if you have multiple contracts operating at your practice. Click **OK** to generate your report.

In every tab of this report you have the ability to view information for a specific performer. Select the desired from the Performer dropdown at the top of the screen.

The first tab within this report is **Month Totals**. This presents a bar chart showing the total amount of UDA's each month in the selected year against the total SDL.



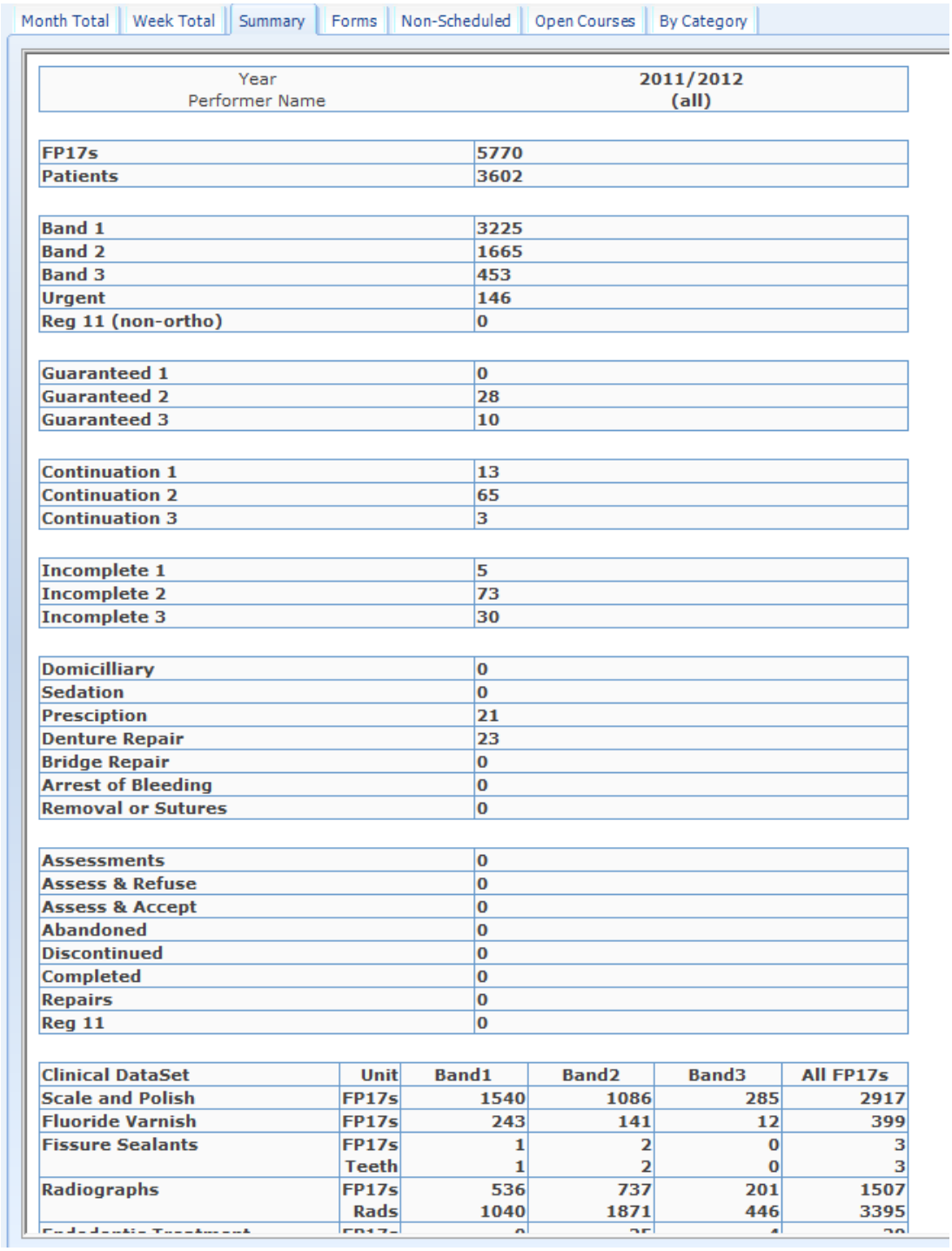
Week Totals is the next tab which displays UDA, UOA and SDL totals for each week in the selected year.



Month Total | Week Total | Summary | Forms | Non-Scheduled | Open Courses | By Category

Year Performer Name			2011/2012 (all)	
Week	**UDA**	**UOA**	**SDL**	**%**
1 - 01/04	201.15	0.00	205.15	1.35
2 - 11/04	150.60	0.00	152.60	1.01
3 - 18/04	191.60	0.00	197.60	1.29
4 - 25/04	181.80	0.00	180.00	1.22
5 - 02/05	97.15	0.00	101.15	0.65
6 - 09/05	69.20	0.00	69.20	0.46
7 - 16/05	140.55	0.00	149.55	0.94
8 - 23/05	155.75	0.00	155.75	1.04
9 - 30/05	114.20	0.00	118.20	0.77
10 - 06/06	161.00	0.00	161.00	1.08
11 - 13/06	86.20	0.00	86.20	0.58
12 - 20/06	207.80	0.00	197.80	1.39
13 - 27/06	235.80	0.00	237.80	1.58
14 - 04/07	204.35	0.00	216.35	1.37
15 - 11/07	288.50	0.00	287.50	1.94
16 - 18/07	201.20	0.00	208.20	1.35
17 - 25/07	170.40	0.00	171.40	1.14
18 - 01/08	195.20	0.00	192.20	1.31
19 - 08/08	240.15	0.00	263.15	1.61
20 - 15/08	266.00	0.00	275.00	1.78
21 - 22/08	280.20	0.00	280.20	1.88
22 - 29/08	309.80	0.00	308.80	2.08
23 - 05/09	351.95	0.00	356.95	2.36
24 - 12/09	358.80	0.00	351.80	2.41
25 - 19/09	424.15	0.00	439.15	2.85
26 - 26/09	445.40	0.00	454.40	2.99
27 - 03/10	360.95	0.00	343.95	2.42
28 - 10/10	317.00	0.00	278.00	2.13
29 - 17/10	338.40	0.00	289.40	2.27
30 - 24/10	426.20	0.00	363.20	2.86
31 - 31/10	398.70	0.00	408.50	2.67
32 - 07/11	507.00	0.00	477.00	3.40
33 - 14/11	408.20	0.00	391.20	2.74
34 - 21/11	406.40	0.00	391.40	2.73
35 - 28/11	359.60	0.00	344.60	2.41
36 - 05/12	450.40	0.00	447.40	3.02
37 - 12/12	387.70	0.00	382.70	2.60
38 - 19/12	395.80	0.00	389.80	2.66
39 - 26/12	79.00	0.00	67.00	0.53
40 - 02/01	226.60	0.00	225.60	1.52
41 - 09/01	346.95	0.00	346.95	2.33
42 - 16/01	279.75	0.00	279.75	1.88
43 - 23/01	368.40	0.00	365.40	2.47
44 - 30/01	394.75	0.00	391.75	2.65
45 - 06/02	209.20	0.00	197.20	1.40
46 - 13/02	396.00	0.00	378.00	2.66

The next tab is the **Summary** tab. From this tab you can gather information such as total amount of activity per band, amount of treatment completed under guarantee, activity completed as continuation. This tab also presents totals for specific treatment items, i.e. examinations, dentures completed within the particular time period. You can also gather new patient information at the bottom of this tab.

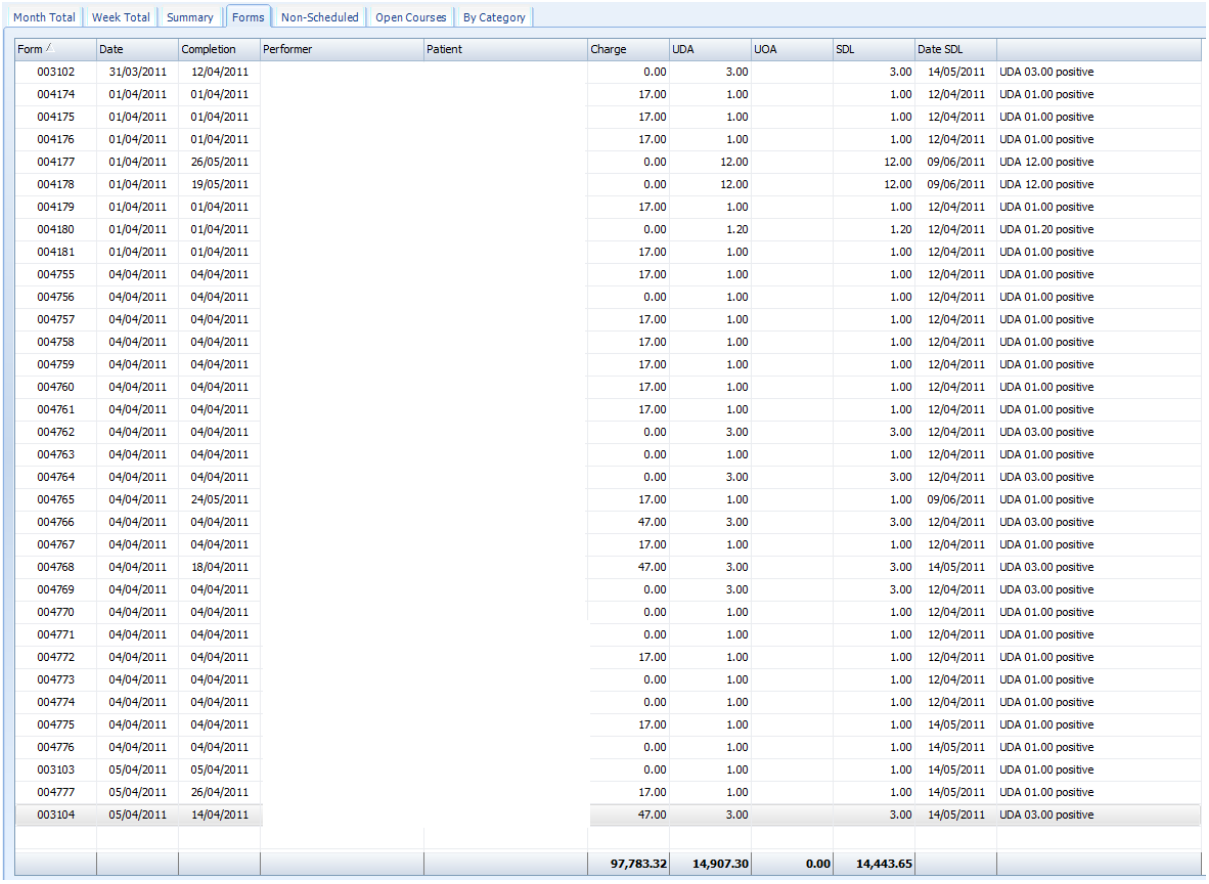


Month Total | Week Total | Summary | Forms | Non-Scheduled | Open Courses | By Category

Year Performer Name	2011/2012 (all)
FP17s	5770
Patients	3602
Band 1	3225
Band 2	1665
Band 3	453
Urgent	146
Reg 11 (non-ortho)	0
Guaranteed 1	0
Guaranteed 2	28
Guaranteed 3	10
Continuation 1	13
Continuation 2	65
Continuation 3	3
Incomplete 1	5
Incomplete 2	73
Incomplete 3	30
Domicilliary	0
Sedation	0
Presciption	21
Denture Repair	23
Bridge Repair	0
Arrest of Bleeding	0
Removal or Sutures	0
Assessments	0
Assess & Refuse	0
Assess & Accept	0
Abandoned	0
Discontinued	0
Completed	0
Repairs	0
Reg 11	0

Clinical DataSet	Unit	Band1	Band2	Band3	All FP17s
Scale and Polish	FP17s	1540	1086	285	2917
Fluoride Varnish	FP17s	243	141	12	399
Fissure Sealants	FP17s	1	2	0	3
	Teeth	1	2	0	3
Radiographs	FP17s	536	737	201	1507
	Rads	1040	1871	446	3395

Forms displays all treatment forms that were transmitted in the chosen time period.



Month Total | Week Total | Summary | Forms | Non-Scheduled | Open Courses | By Category

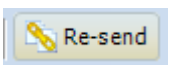
Form	Date	Completion	Performer	Patient	Charge	UDA	UOA	SDL	Date SDL	
003102	31/03/2011	12/04/2011			0.00	3.00		3.00	14/05/2011	UDA 03.00 positive
004174	01/04/2011	01/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004175	01/04/2011	01/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004176	01/04/2011	01/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004177	01/04/2011	26/05/2011			0.00	12.00		12.00	09/06/2011	UDA 12.00 positive
004178	01/04/2011	19/05/2011			0.00	12.00		12.00	09/06/2011	UDA 12.00 positive
004179	01/04/2011	01/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004180	01/04/2011	01/04/2011			0.00	1.20		1.20	12/04/2011	UDA 01.20 positive
004181	01/04/2011	01/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004755	04/04/2011	04/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004756	04/04/2011	04/04/2011			0.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004757	04/04/2011	04/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004758	04/04/2011	04/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004759	04/04/2011	04/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004760	04/04/2011	04/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004761	04/04/2011	04/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004762	04/04/2011	04/04/2011			0.00	3.00		3.00	12/04/2011	UDA 03.00 positive
004763	04/04/2011	04/04/2011			0.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004764	04/04/2011	04/04/2011			0.00	3.00		3.00	12/04/2011	UDA 03.00 positive
004765	04/04/2011	24/05/2011			17.00	1.00		1.00	09/06/2011	UDA 01.00 positive
004766	04/04/2011	04/04/2011			47.00	3.00		3.00	12/04/2011	UDA 03.00 positive
004767	04/04/2011	04/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004768	04/04/2011	18/04/2011			47.00	3.00		3.00	14/05/2011	UDA 03.00 positive
004769	04/04/2011	04/04/2011			0.00	3.00		3.00	12/04/2011	UDA 03.00 positive
004770	04/04/2011	04/04/2011			0.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004771	04/04/2011	04/04/2011			0.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004772	04/04/2011	04/04/2011			17.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004773	04/04/2011	04/04/2011			0.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004774	04/04/2011	04/04/2011			0.00	1.00		1.00	12/04/2011	UDA 01.00 positive
004775	04/04/2011	04/04/2011			17.00	1.00		1.00	14/05/2011	UDA 01.00 positive
004776	04/04/2011	04/04/2011			0.00	1.00		1.00	14/05/2011	UDA 01.00 positive
003103	05/04/2011	05/04/2011			0.00	1.00		1.00	14/05/2011	UDA 01.00 positive
004777	05/04/2011	26/04/2011			17.00	1.00		1.00	14/05/2011	UDA 01.00 positive
003104	05/04/2011	14/04/2011			47.00	3.00		3.00	14/05/2011	UDA 03.00 positive
					97,783.32	**14,907.30**	**0.00**	**14,443.65**		

The fifth tab is **Non-Scheduled**. This tab displays all forms that were transmitted in the given time period but have not been included in the schedule. This may be for a number of reasons, such as invalid PIN number, forms already sent etc.

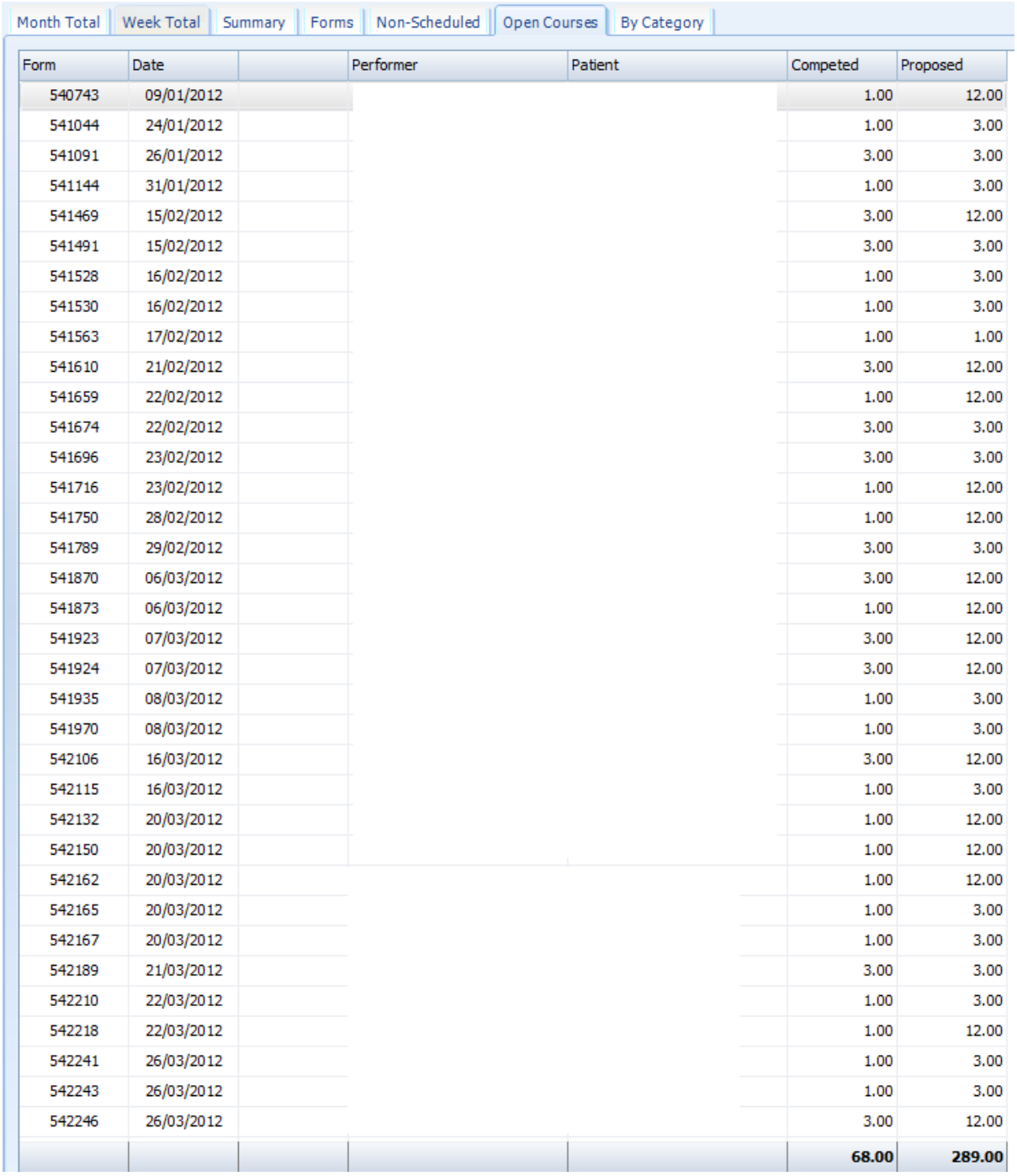
Month Total | Week Total | Summary | Forms | Non-Scheduled | Open Courses | By Category

Form	Date	Completion	Performer	Patient	UDA	UOA
001426	13/09/2011	13/09/2011			1.00	
001434	14/09/2011	10/10/2011			3.00	
001473	15/09/2011	15/09/2011			3.00	
001518	19/09/2011	11/10/2011			12.00	
001527	19/09/2011	19/09/2011			1.00	
001637	22/09/2011	21/11/2011			12.00	
001650	22/09/2011	18/10/2011			12.00	
001668	22/09/2011	22/09/2011			1.00	
001698	26/09/2011	21/11/2011			3.00	
001700	26/09/2011	18/10/2011			3.00	
001743	27/09/2011	24/10/2011			12.00	
001745	27/09/2011	06/10/2011			3.00	
001781	28/09/2011	11/10/2011			3.00	
001786	28/09/2011	19/10/2011			3.00	
001794	28/09/2011	24/10/2011			12.00	
001813	29/09/2011	24/10/2011			12.00	
001817	29/09/2011	06/10/2011			3.00	
001838	29/09/2011	29/09/2011			3.00	
001879	03/10/2011	26/10/2011			12.00	
001882	03/10/2011	24/10/2011			3.00	
001886	03/10/2011	10/10/2011			3.00	
001892	03/10/2011	11/10/2011			3.00	
001905	04/10/2011	19/10/2011			12.00	
001907	04/10/2011	19/10/2011			12.00	
001930	04/10/2011	10/11/2011			3.00	
001937	05/10/2011	17/10/2011			3.00	
001940	05/10/2011	10/11/2011			12.00	
539146	18/10/2011	18/10/2011			3.00	
540082	30/11/2011	01/02/2012			3.00	
541761	28/02/2012	28/02/2012			3.00	
541847	02/03/2012	30/03/2012			12.00	
541853	05/03/2012	30/03/2012			12.00	
541864	05/03/2012	30/03/2012			12.00	
542022	13/03/2012	16/03/2012			12.00	
542063	15/03/2012	30/03/2012			12.00	
					268.00	**0.00**

In the **UDA Summary** report within the **Non-Scheduled** tab you have the ability to resend all these non-scheduled forms in bulk. Click the **Resend** button at the top of the screen to resend every form in the list.



The next tab is **Open Courses.** This tab displays all treatment forms that were created within the given time period but have not been transmitted. This is likely to be because the patient has not completed all of their proposed treatment. This tab shows the UDA/UOA value proposed against the completed value in the far right columns.

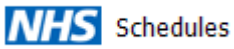


Month Total | Week Total | Summary | Forms | Non-Scheduled | Open Courses | By Category

Form	Date		Performer	Patient	Competed	Proposed
540743	09/01/2012				1.00	12.00
541044	24/01/2012				1.00	3.00
541091	26/01/2012				3.00	3.00
541144	31/01/2012				1.00	3.00
541469	15/02/2012				3.00	12.00
541491	15/02/2012				3.00	3.00
541528	16/02/2012				1.00	3.00
541530	16/02/2012				1.00	3.00
541563	17/02/2012				1.00	1.00
541610	21/02/2012				3.00	12.00
541659	22/02/2012				1.00	12.00
541674	22/02/2012				3.00	3.00
541696	23/02/2012				3.00	3.00
541716	23/02/2012				1.00	12.00
541750	28/02/2012				1.00	12.00
541789	29/02/2012				3.00	3.00
541870	06/03/2012				3.00	12.00
541873	06/03/2012				1.00	12.00
541923	07/03/2012				3.00	12.00
541924	07/03/2012				3.00	12.00
541935	08/03/2012				1.00	3.00
541970	08/03/2012				1.00	3.00
542106	16/03/2012				3.00	12.00
542115	16/03/2012				1.00	3.00
542132	20/03/2012				1.00	12.00
542150	20/03/2012				1.00	12.00
542162	20/03/2012				1.00	12.00
542165	20/03/2012				1.00	3.00
542167	20/03/2012				1.00	3.00
542189	21/03/2012				3.00	3.00
542210	22/03/2012				1.00	3.00
542218	22/03/2012				1.00	12.00
542241	26/03/2012				1.00	3.00
542243	26/03/2012				1.00	3.00
542246	26/03/2012				3.00	12.00
					68.00	**289.00**

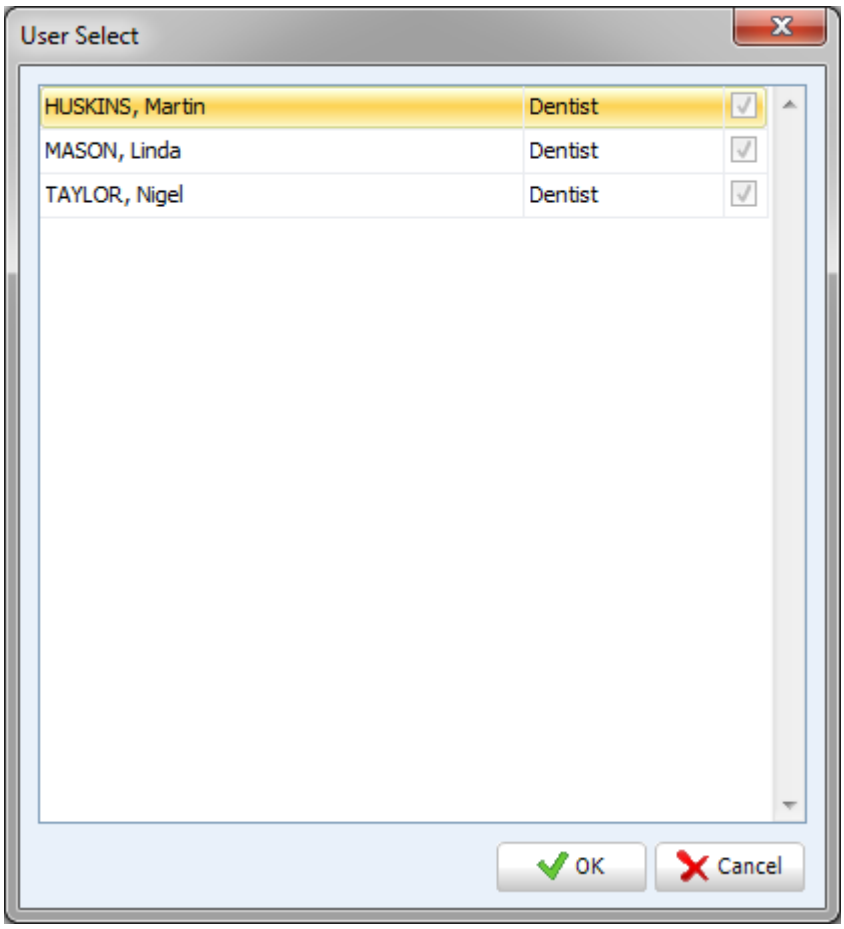
Schedule

The third and final report in the **NHS** section is the **Schedules** report. This allows you to view scheduled UDA's/UOA's, expected UDA's/UOA's and Daily UDA/UOA's for a chosen performer. To access this report, click on the **Schedules** icon.



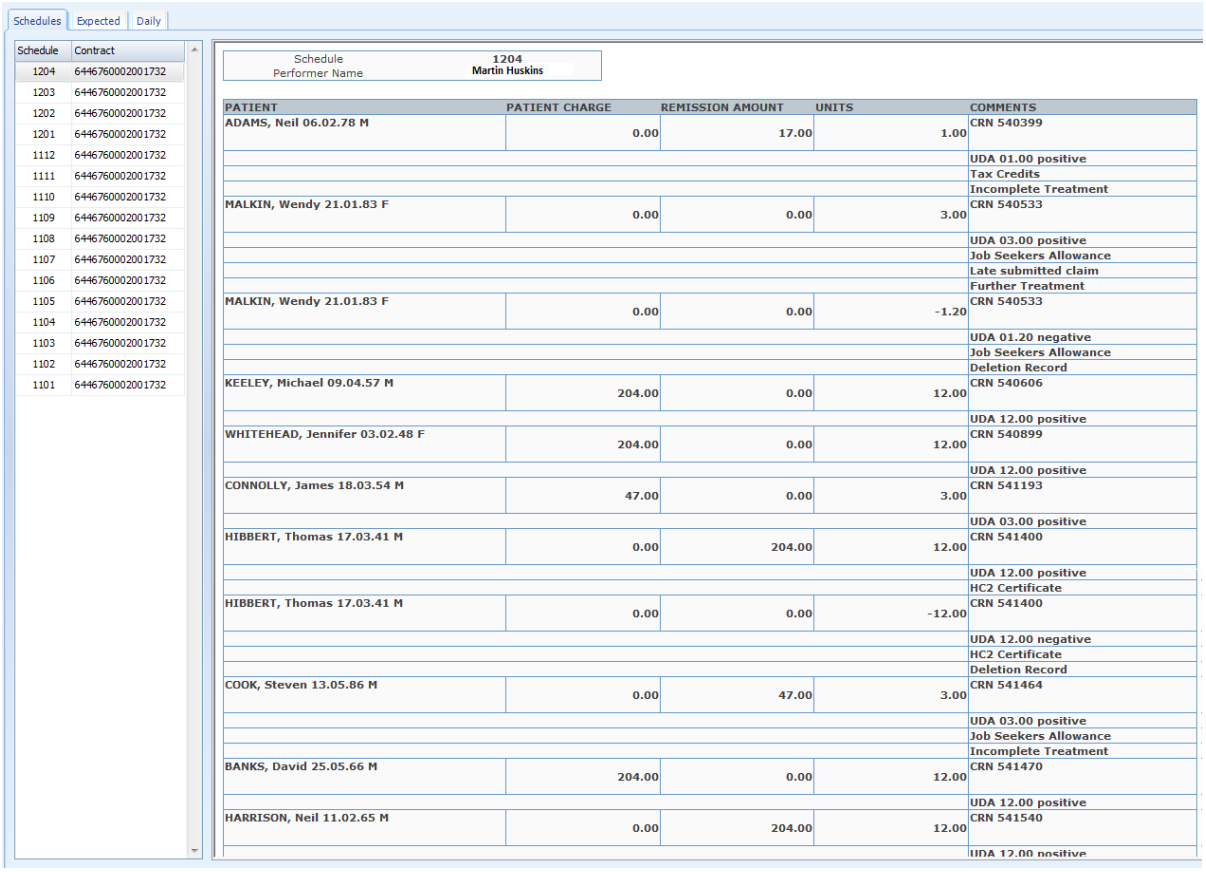
After clicking on the **Schedules** icon click the **Report** button in the top left hand corner of the screen.

After clicking **Report** you will be presented with the **User Select** window.



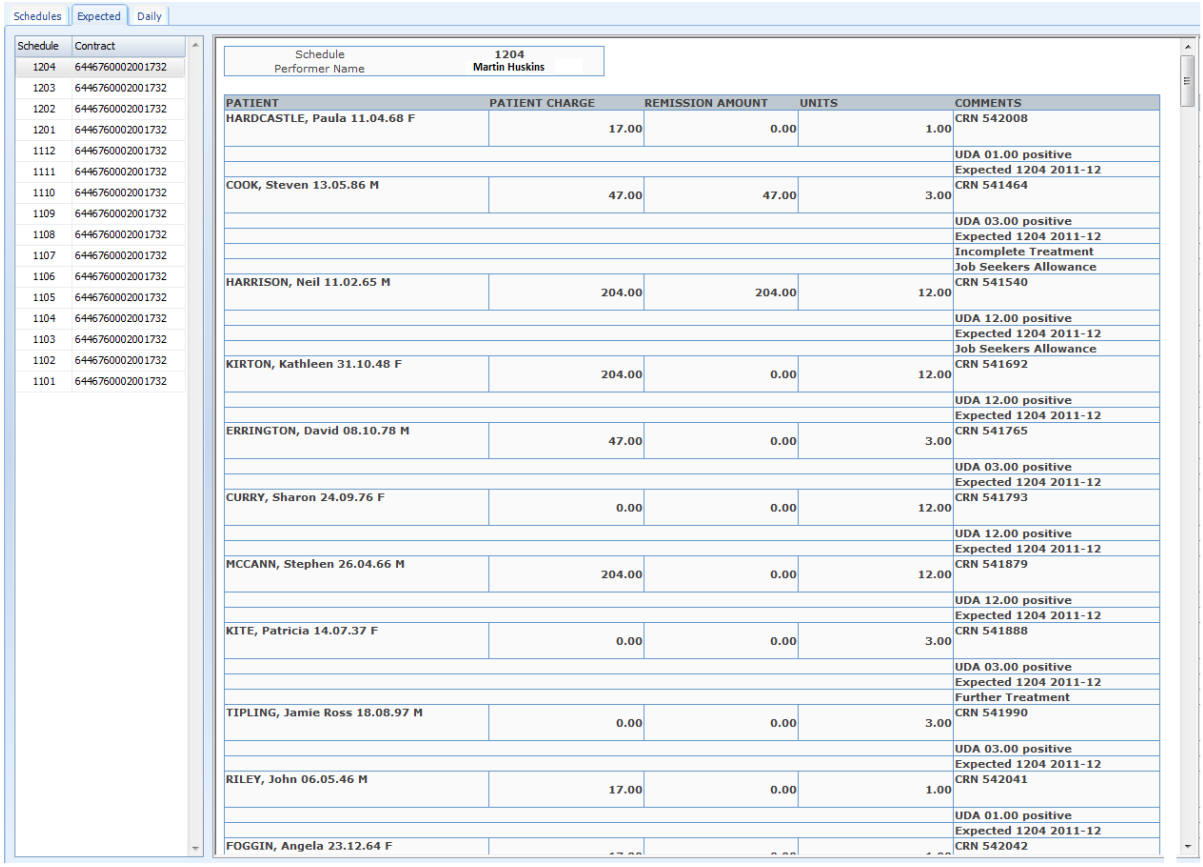
Select the desired user selecting their name then click **OK**.

The report will be generated and will open in the **Schedules** tab.



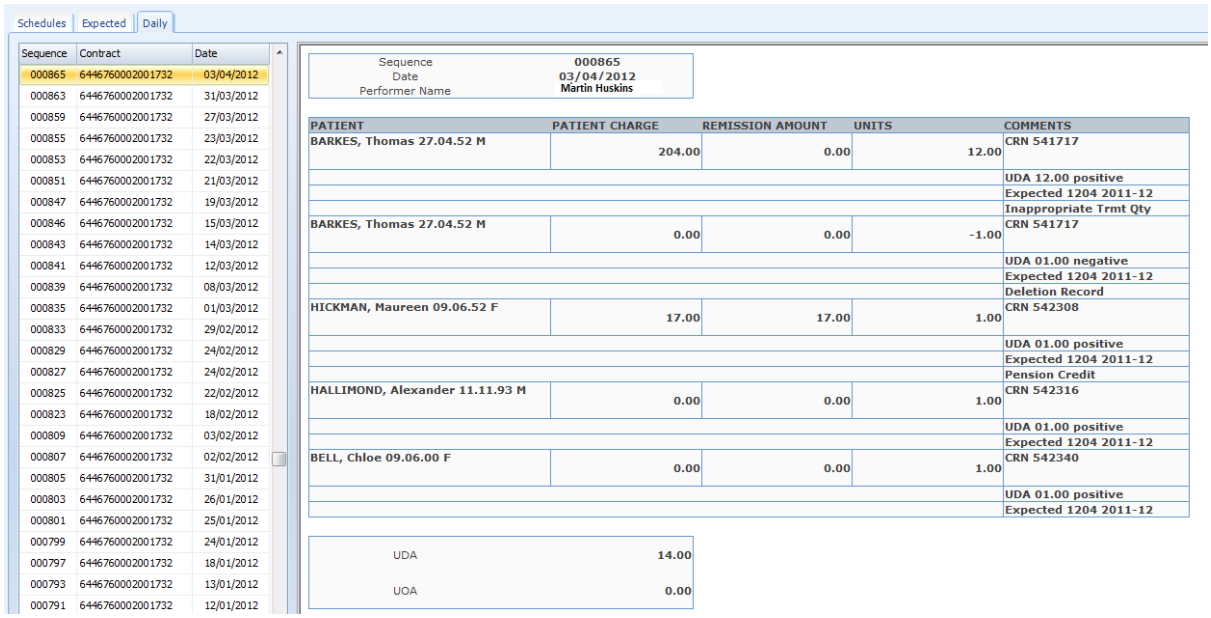
As you can see in the example above the Schedule tab shows the name of the patient followed by date of birth and gender. The patient and remission charges are also included in this tab aside the UDA units and any relevant comments. Select which month you wish to view by clicking on the desired date in the left pane. The first two digits of the figure represent the year, the next two represent the month. For example 1204 stands for April 2012.

The next tab in the **Schedules** report is the **Expected** tab. This shows units that are expected in the month selected.



The tab looks very similar to the **Schedule** tab. The only difference is that in the **Comments** column you can see the expected date.

The final tab in this report is the **Daily** tab. This shows UDA and UOA figures on a daily basis.



Select the desired date from the left pane. From this tab you can view the same information as the previous two tabs. You can also see the UDA and UAO totals at the bottom of the window.

Miscellaneous

The **Miscellaneous** section is the final section of the reporting screen. This section is essentially 'for everything else' that hasn't been covered in previous sections of the reporting screen.

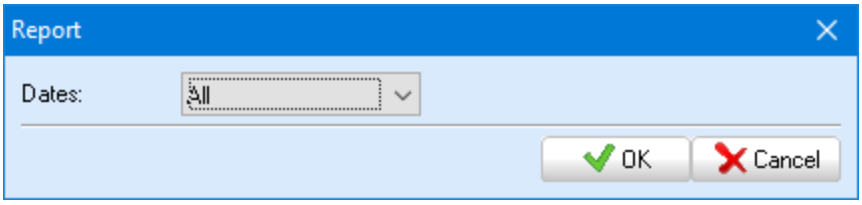
Stock

The first report in this section is the **Stock** report. This is to keep track of the amount of stock items used within a particular time period.

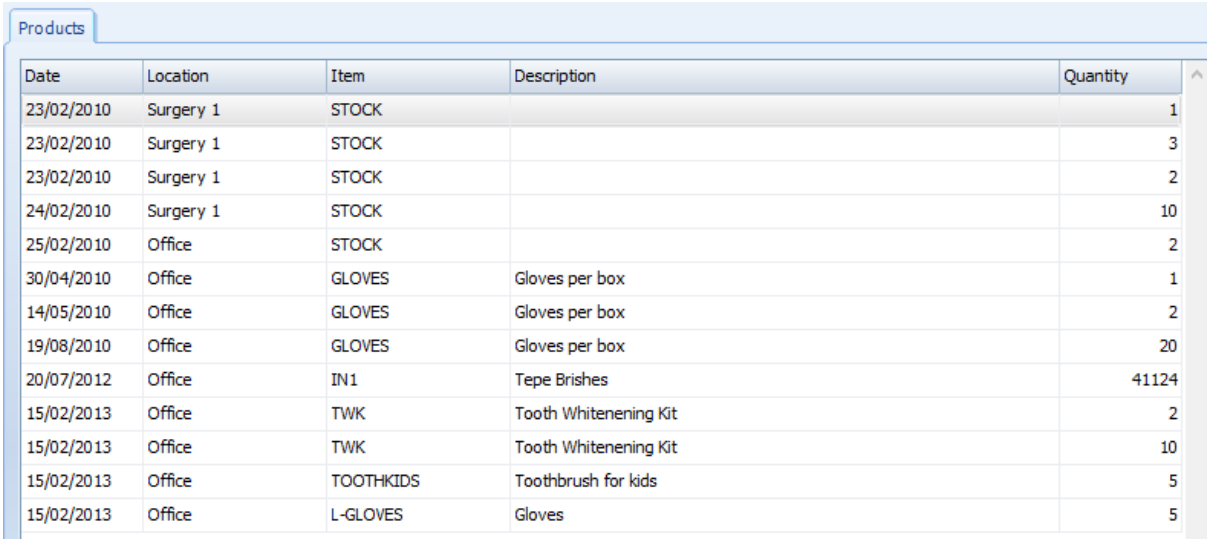
To access this report, click on the **Stock** button.

After entering the **Stock** report, click on the **Report** button in the top left hand corner of the screen.

You will then be presented with the **Select Dates** window.



Select your date range then click **OK**.



Date	Location	Item	Description	Quantity
23/02/2010	Surgery 1	STOCK		1
23/02/2010	Surgery 1	STOCK		3
23/02/2010	Surgery 1	STOCK		2
24/02/2010	Surgery 1	STOCK		10
25/02/2010	Office	STOCK		2
30/04/2010	Office	GLOVES	Gloves per box	1
14/05/2010	Office	GLOVES	Gloves per box	2
19/08/2010	Office	GLOVES	Gloves per box	20
20/07/2012	Office	IN1	Tepe Brishes	41124
15/02/2013	Office	TWK	Tooth Whitenening Kit	2
15/02/2013	Office	TWK	Tooth Whitenening Kit	10
15/02/2013	Office	TOOTHKIDS	Toothbrush for kids	5
15/02/2013	Office	L-GLOVES	Gloves	5

The report generates a list of items used. The report shows the location they were used in, the description and how many were used.

You can filter your report by location and product. Use the dropdown lists at the top of the screen.

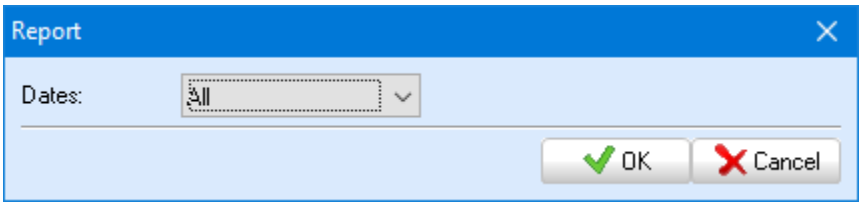
Sundry

The next report is the **Sundry** report. This allows you to keep track of how many sundry items the practice has sold in a particular time period.

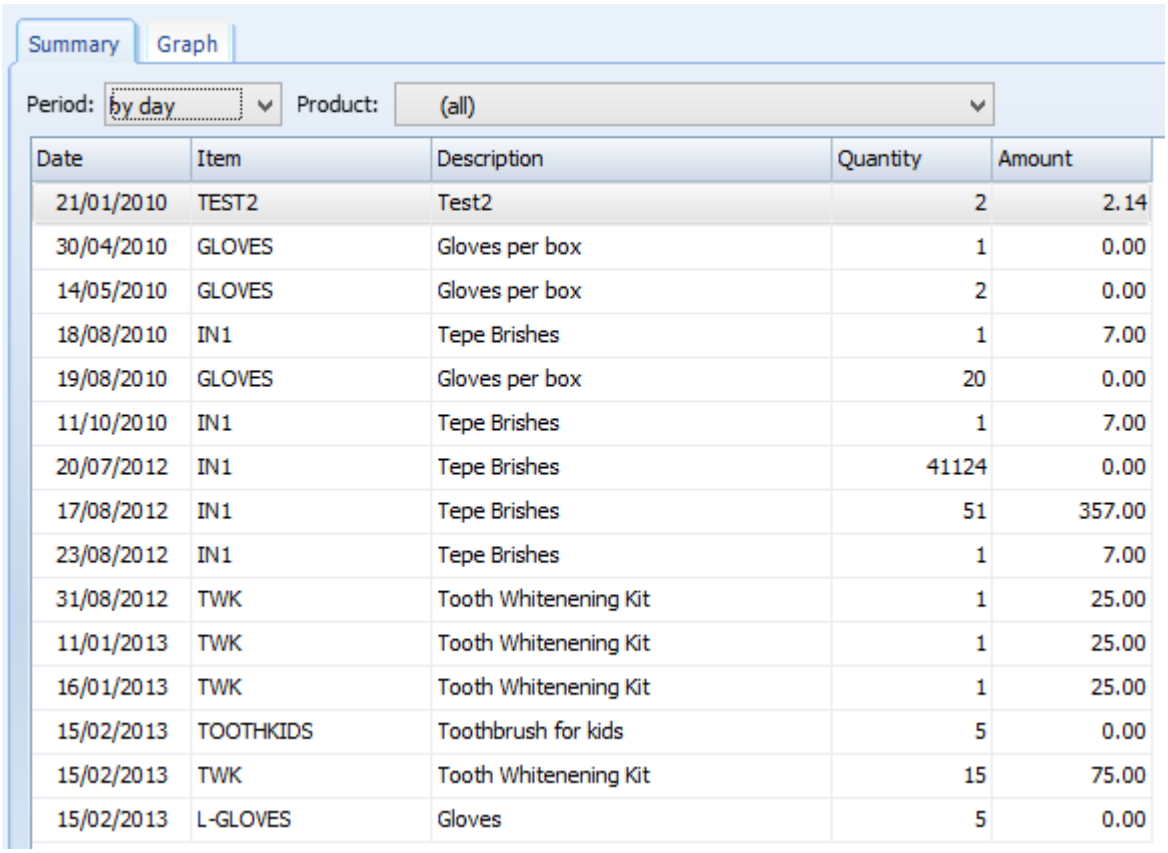
Click on the **Sundry** button to access this report.

Now you are within the Sundry report, click the **New** button in the top left hand corner of the screen.

Select you date range for your report from the **Select Dates** window.



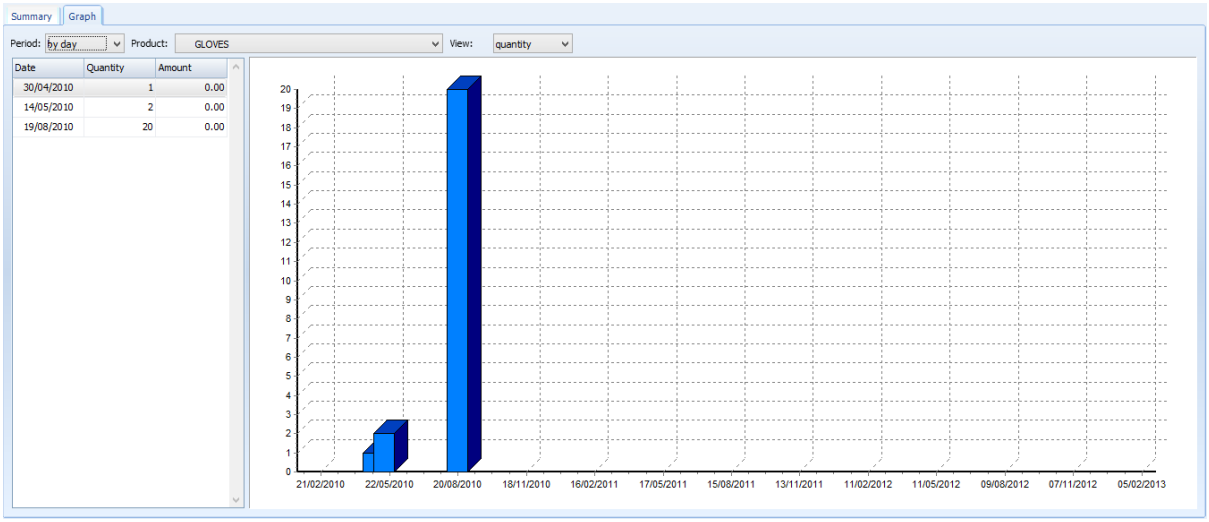
Your sundry items report will now be generated.



Date	Item	Description	Quantity	Amount
21/01/2010	TEST2	Test2	2	2.14
30/04/2010	GLOVES	Gloves per box	1	0.00
14/05/2010	GLOVES	Gloves per box	2	0.00
18/08/2010	IN1	Tepe Brishes	1	7.00
19/08/2010	GLOVES	Gloves per box	20	0.00
11/10/2010	IN1	Tepe Brishes	1	7.00
20/07/2012	IN1	Tepe Brishes	41124	0.00
17/08/2012	IN1	Tepe Brishes	51	357.00
23/08/2012	IN1	Tepe Brishes	1	7.00
31/08/2012	TWK	Tooth Whitenening Kit	1	25.00
11/01/2013	TWK	Tooth Whitenening Kit	1	25.00
16/01/2013	TWK	Tooth Whitenening Kit	1	25.00
15/02/2013	TOOTHKIDS	Toothbrush for kids	5	0.00
15/02/2013	TWK	Tooth Whitenening Kit	15	75.00
15/02/2013	L-GLOVES	Gloves	5	0.00

The **Summary** tab lists all sundry sales within the chosen time period followed by the quantity and the amount. The **Period** filter can view this list by day, week, and month or by period. You can also filter your report so it only shows a particular product. Choose from the **Product** dropdown list.

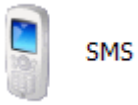
The second and final tab in this report is the **Graph** tab. The tab presents a bar chart for certain a particular product within the chosen time period.



You can choose to view your chart by day, week or month. Use the **Period** dropdown list to choose. You can also choose to view by quantity or amount, use the **View** dropdown list to make your selection. To choose the product you wish to view, select from the **Product** dropdown list.

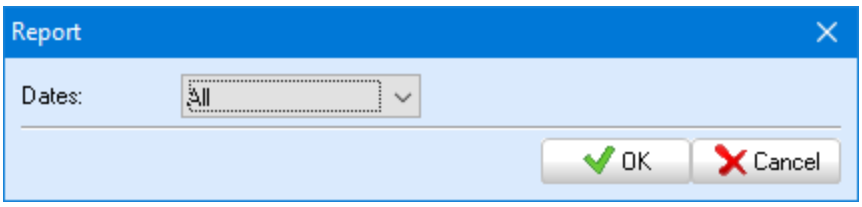
SMS

The **SMS** report allows you to view SMS messages that were prepared in a chosen time period. To access this report, click on the **SMS** button.



After entering the **SMS** report, click the **Report** button in the top left of the screen.

You will then be presented with the **Select Dates** window.

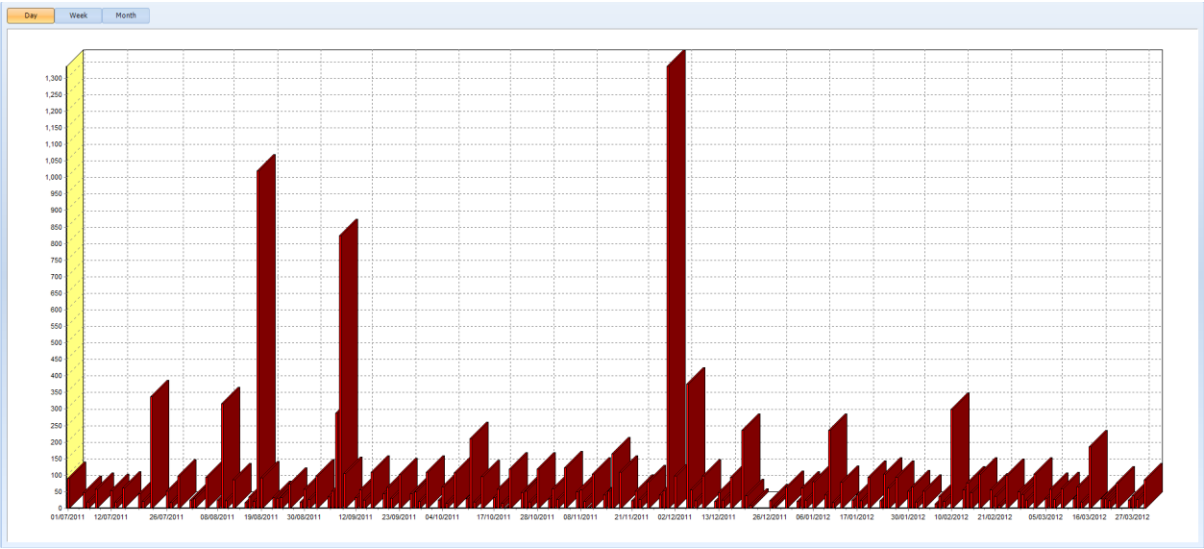


Select the date range you wish to view then click **OK**.

The report opens in the **Messages** tab. This tab lists every SMS message that was prepared within the chosen time period. The list shows when the SMS was created and processed. It also shows the

status of the message, for example, ‘Delivered’ or ‘With operator’. You can also see the content of the SMS under the Text heading, and the finally you can see the length of the message in the far right hand corner in characters.

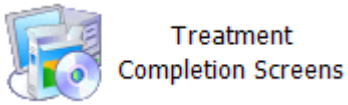
The second and final tab within this report is the **Graph** tab.



This graph shows totals either by day, week or by month of SMS messages that were processed in the chosen time period. Use the buttons at the top of the screen to choose whether you wish to view by day, week or month.

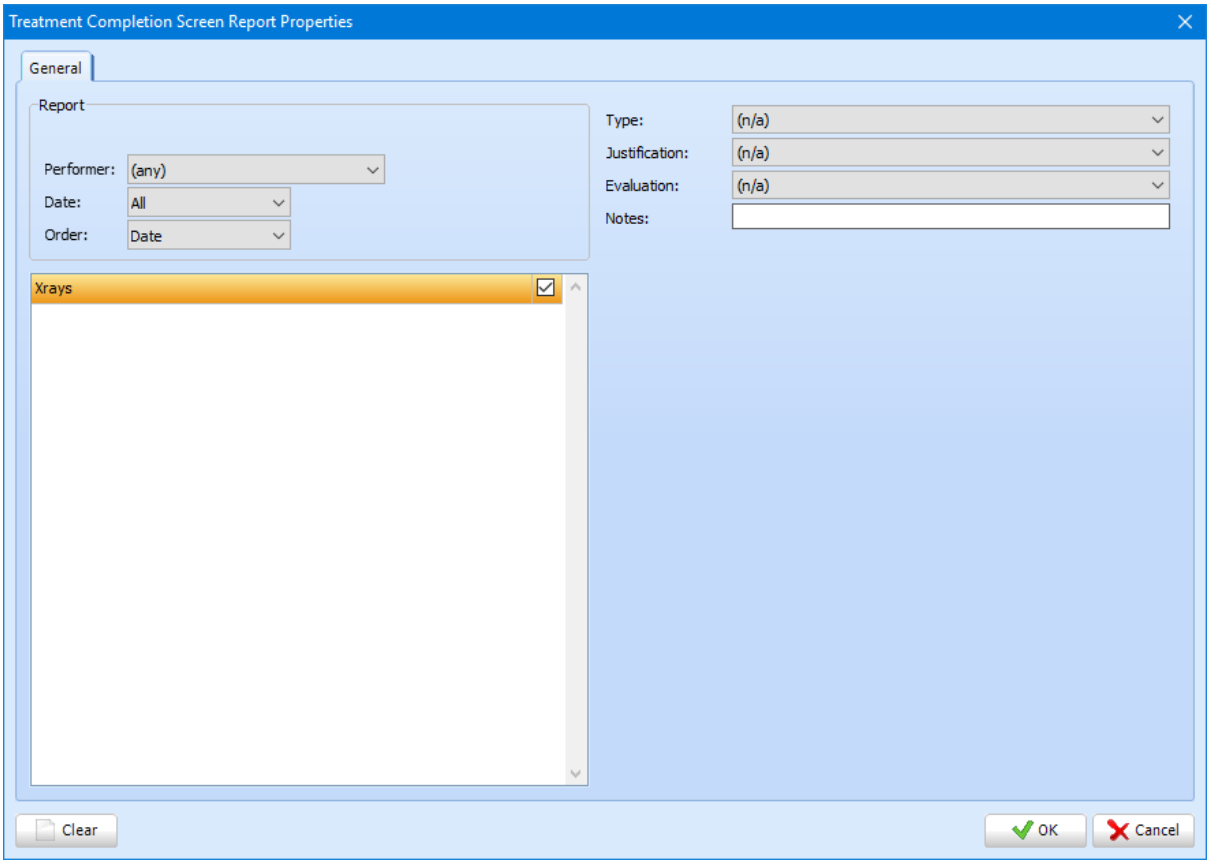
Treatment Completion Screens

The **Treatment Completion Screens** report allows you to analyse feedback on various observations added to the treatment completion screens within a given time period. To access this report, click on the **Treatment Completion Screens** button.



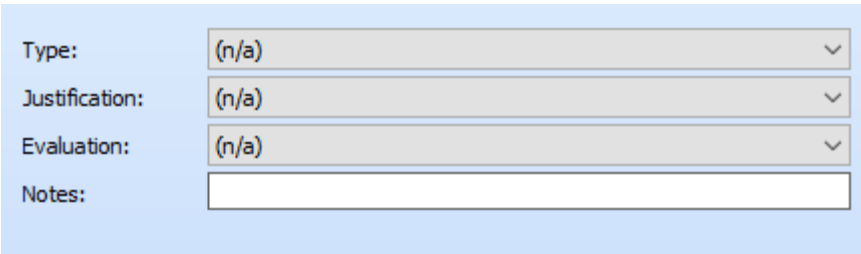
Once you have entered the **Treatment Completion Screens** report, click the **Report** button in the top left hand corner of the screen.

The following window will then appear.



First of all choose the performer(s) you wish to report using the **Performer** dropdown list. Secondly choose the date range you wish to report on. Again, select from the dropdown list next to **Date**. You are also able to choose the order in which your report is presented.

Below, you have a list of the treatment completion screens you have active in your system. Click on the one you wish to report on. In the example above we have a TCS for Implants and one for X-rays. After selecting the desired TCS, the different options for that TCS appears in the top right hand corner of the window. For example I wish to view all bitewing x-rays with an evaluation of 2 in a particular time period.



Once you have made your selections click **OK** in the bottom right hand corner of the window. Your report will now be generated.

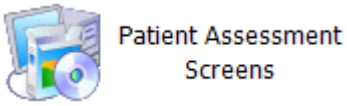
Date	Item	Description	Performer		Patient	Evaluation	Justification	Notes	Type
19/07/2011	0201	Small Xray	BEGUM, Rabia	NHS	NUNN, Andrew	2	Caries		Bitewing
22/07/2011	0201	Small Xray	MALVIYA, Parul	NHS	SMITH, Glynis	2	Caries		Bitewing
28/07/2011	0201	Small Xray	MALVIYA, Parul	NHS	VARLEY, Leanne	2	Caries		Bitewing
01/08/2011	0201	Small Xray	MALVIYA, Parul	NHS	RICHARDSON, Helen	2	Caries	cone cut	Bitewing
02/08/2011	0201	Small Xray	MALVIYA, Parul	NHS	JONES, Gary	2	Caries	cone cut	Bitewing
23/08/2011	0201	Small Xray	MALVIYA, Parul	NHS	BURLINSON, James	2	Caries		Bitewing
25/08/2011	0201	Small Xray	MALVIYA, Parul	NHS	THOMPSON, James	2	Caries		Bitewing
07/09/2011	0201	Small Xray	LAD, Priya	NHS	RICHARDSON, Laura	2	Caries	contrast not ideal to	Bitewing
08/09/2011	0201	Small Xray	LAD, Priya	NHS	GOLLAN, John	2	Caries	over exposure on the	Bitewing
12/09/2011	0201	Small Xray	MALVIYA, Parul	NHS	ADAMS, Laura	2	Caries	cone cut rhs bw [pm]	Bitewing
12/09/2011	0201	Small Xray	MALVIYA, Parul	NHS	MCNALLY, Joan	2	Caries	dark & poor contrast	Bitewing
12/09/2011	0201	Small Xray	BEGUM, Rabia	NHS	WALLBANK, Peter L	2	Caries	underexposd	Bitewing
13/09/2011	0201	Small Xray	LAD, Priya	NHS	FORREST, Margaret	2	Caries	LHS pt didnt bite down	Bitewing

From the report you can see the date, the treatment item code, followed by the descriptions of the treatment item. You also can view the patient name, the performer and scheme. You can then view anything that was added for the TCS options. You have the ability to export this report as a CSV file so this can be opened in third party software such as Excel. To do this, click the **Export** button at the top of the screen.

Patient Assessment Screens

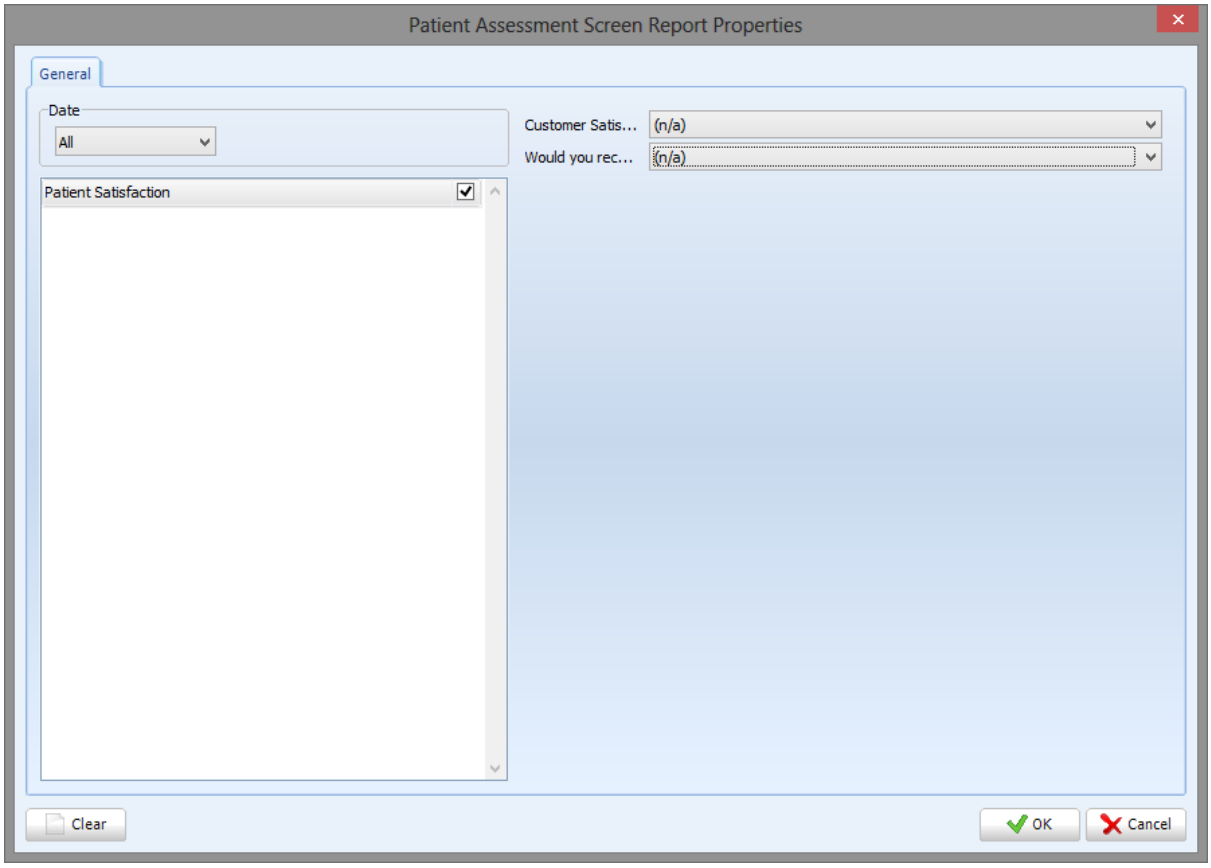
The **Patient Assessment Screens** report is designed so you can view responses to various patient assessments you have set up.

Click on the **Patient Assessment Screens** button to access this report.



Now click on the **Report** button in the top left hand corner of the screen.

You will then be presented with the following window.



First of all select the date range you wish to view patient assessments for. Then select the responses you wish to view by selecting them from the dropdown lists next to the questions in the top right hand side of the window. Click **OK** once you have chosen what you wish to view.

Date	ID	Name	Title		DOB	Reference	Customer Satisfaction	Would you recommend
21/01/2013	765	MUELLER, Melissa	Miss		11/10/1993	765	Very Satisfied	
23/02/2013	1	HATFIELD, Lydia	Miss		24/03/2007	1	Very Satisfied	
23/02/2013	1348	GALLAGHER, Finley	Mr		04/04/1941	1348	Very Satisfied	

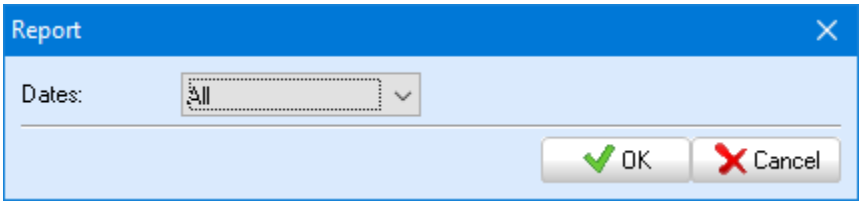
The example above shows all the patients that answered Very Satisfied for a patient satisfaction assessment. This can be a useful service to help you target how you can improve your service.

Logon History

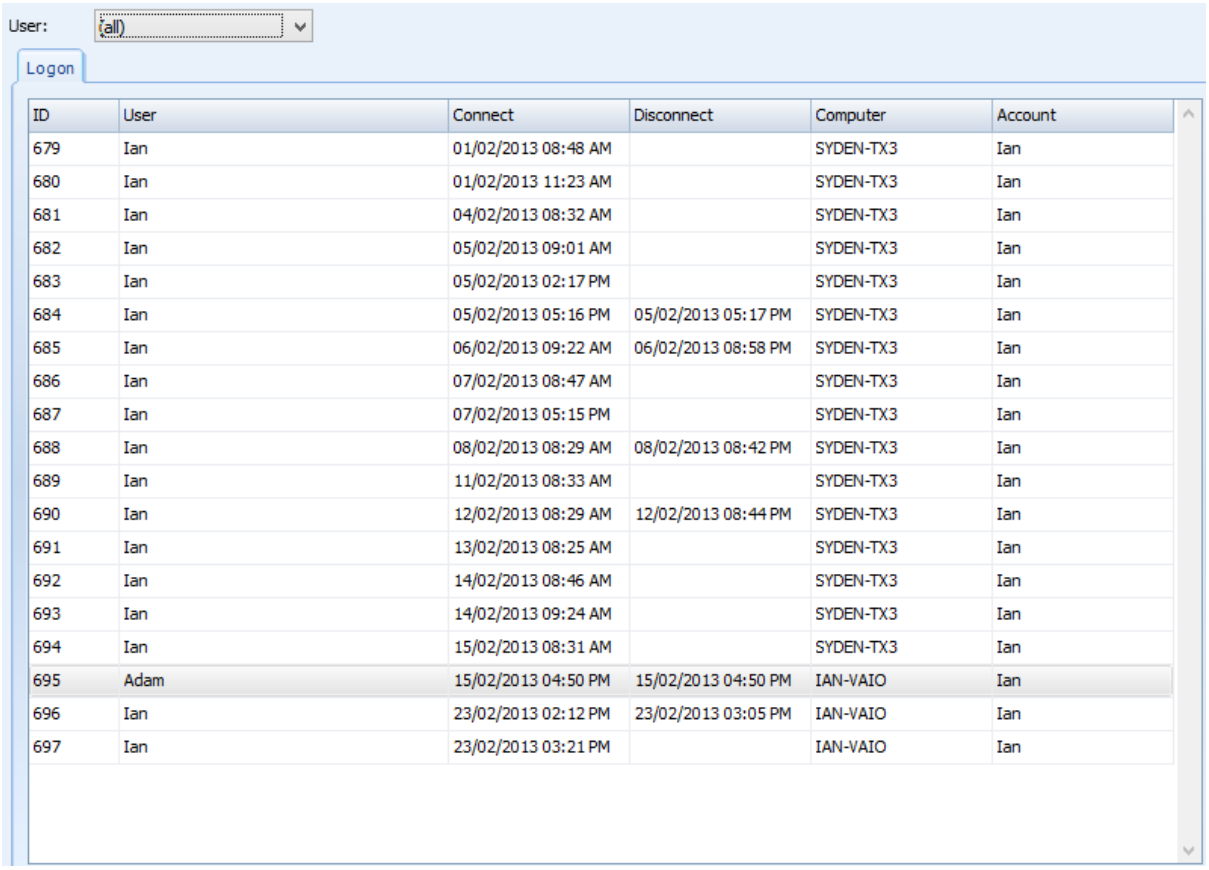
The Logon History report allows you to view who was logged into certain PC's at a particular time. To access this report, click on the **Logon History** button.

After clicking the button, click on **Report** in the top left hand corner of the screen.

Select the date range you wish to view log on history for.



Your logon history report will now be generated.



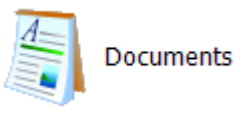
ID	User	Connect	Disconnect	Computer	Account
679	Ian	01/02/2013 08:48 AM		SYDEN-TX3	Ian
680	Ian	01/02/2013 11:23 AM		SYDEN-TX3	Ian
681	Ian	04/02/2013 08:32 AM		SYDEN-TX3	Ian
682	Ian	05/02/2013 09:01 AM		SYDEN-TX3	Ian
683	Ian	05/02/2013 02:17 PM		SYDEN-TX3	Ian
684	Ian	05/02/2013 05:16 PM	05/02/2013 05:17 PM	SYDEN-TX3	Ian
685	Ian	06/02/2013 09:22 AM	06/02/2013 08:58 PM	SYDEN-TX3	Ian
686	Ian	07/02/2013 08:47 AM		SYDEN-TX3	Ian
687	Ian	07/02/2013 05:15 PM		SYDEN-TX3	Ian
688	Ian	08/02/2013 08:29 AM	08/02/2013 08:42 PM	SYDEN-TX3	Ian
689	Ian	11/02/2013 08:33 AM		SYDEN-TX3	Ian
690	Ian	12/02/2013 08:29 AM	12/02/2013 08:44 PM	SYDEN-TX3	Ian
691	Ian	13/02/2013 08:25 AM		SYDEN-TX3	Ian
692	Ian	14/02/2013 08:46 AM		SYDEN-TX3	Ian
693	Ian	14/02/2013 09:24 AM		SYDEN-TX3	Ian
694	Ian	15/02/2013 08:31 AM		SYDEN-TX3	Ian
695	Adam	15/02/2013 04:50 PM	15/02/2013 04:50 PM	IAN-VAIO	Ian
696	Ian	23/02/2013 02:12 PM	23/02/2013 03:05 PM	IAN-VAIO	Ian
697	Ian	23/02/2013 03:21 PM		IAN-VAIO	Ian

From this window you can see the user, connection time and date, disconnection time and date, the computer and the account.

To filter your report to view logons for a particular user, select the desired user from the **User** dropdown list at the top of the window.

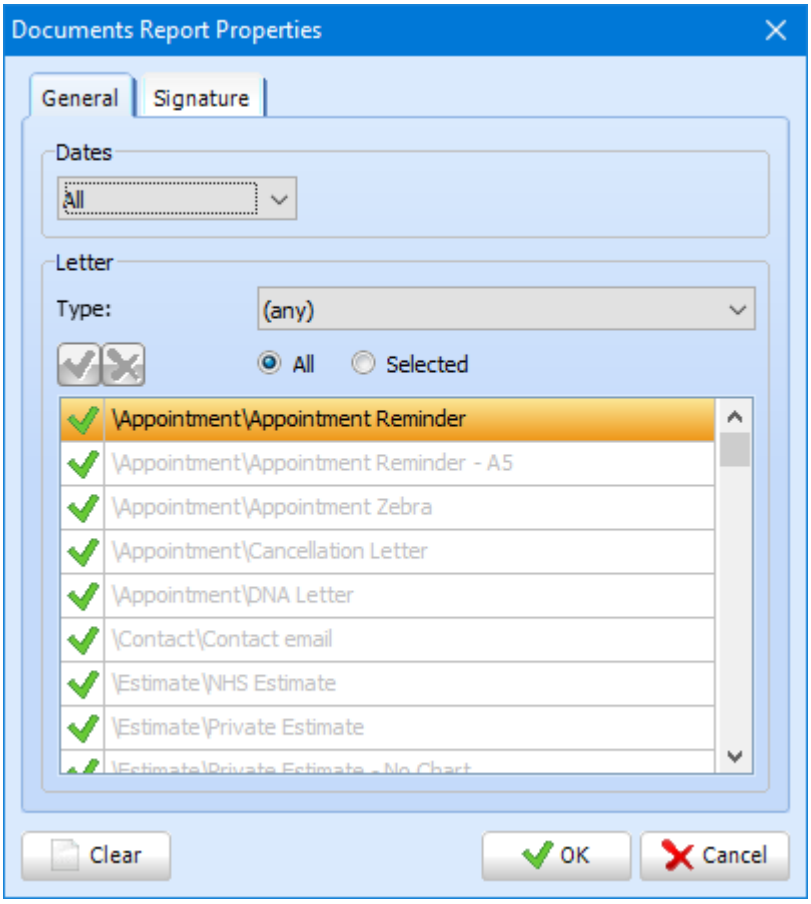
Documents

This Documents allows you to view the documents that have been generated for patients in a given time period. To run this report, click on the **Documents** button.



Now you have entered the Documents report screen click on **Report** in the top left hand corner of the screen.

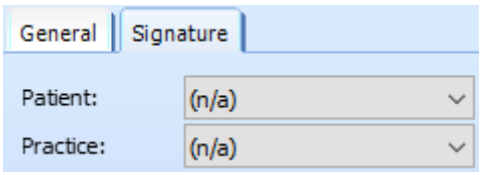
After clicking **Report** you will be presented with the following window.



Firstly, select the date range you wish to run your documents report for by using the **Dates** dropdown list at the top of the window.

Next select which documents you wish to include in your report. If you only wish to view particular documents in your report, click the **Selected** button. Click the tick next to any document you don't wish to include in your report so the tick turns into a cross.

Under the **Signature** tab, you can also filter based on whether the patient and/or performer has signed the document.



Once you have made your selection click **OK**.

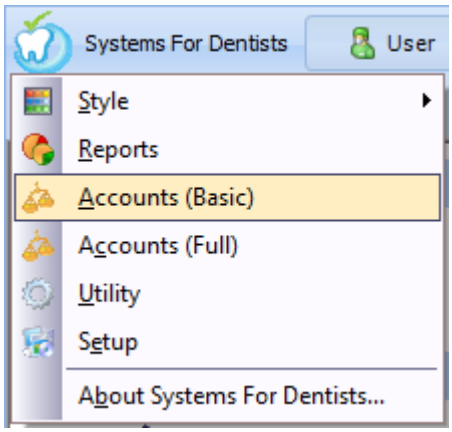
Documents

ID	Patient	Title	DOB	Reference	Date	Subject
374	ALLEN, Adam	Mr	18/04/1966	374	01/09/2010	General\Cancellation Letter
1755	SMITH, Joshua	Mr	28/07/1922	1755	05/10/2010	Dentist Recall
1417	SMITH, Leo	Master	23/12/1992	1417	05/10/2010	Dentist Recall
818	BALDWIN, Lily	Mrs	24/01/1971	818	05/10/2010	Dentist Recall
1755	SMITH, Joshua	Mr	28/07/1922	1755	06/10/2010	Dentist Recall
1417	SMITH, Leo	Master	23/12/1992	1417	06/10/2010	Dentist Recall
818	BALDWIN, Lily	Mrs	24/01/1971	818	06/10/2010	Dentist Recall
699	MCMILLAN, John	Master	09/04/2002	699	06/10/2010	Appointment Zebra
146	AGUIRRE, Jordan	Mr	19/05/1958	146	06/10/2010	Appointment Zebra
146	AGUIRRE, Jordan	Mr	19/05/1958	146	06/10/2010	Appointment Zebra
1266	STONE, Bradley	Mr	12/08/1946	1266	06/10/2010	New document (3)
1266	STONE, Bradley	Mr	12/08/1946	1266	06/10/2010	Appointment Zebra
878	JOHNSTON, Alex	Master	24/05/2006	878	06/10/2010	Appointment Zebra
2001	WADDLE, Christopher	Mr	16/05/1965	2001	11/10/2010	General\Cancellation Letter1
2001	WADDLE, Christopher	Mr	16/05/1965	2001	11/10/2010	Note
1756	SMITH, Libby	Mrs	15/07/1953	1756	28/10/2010	Note
1756	SMITH, Libby	Mrs	15/07/1953	1756	28/10/2010	Estimate\Estimate
1490	ADAMS, Morgan	Mr	10/12/1984	1490	26/06/2012	Appointment Reminder
1219	ADKINS, Elizabeth	Mrs	14/08/1938	1219	26/06/2012	Appointment Reminder
522	AGUIRRE, Phoebe	Miss	25/11/2003	522	26/06/2012	Appointment Reminder
374	ALLEN, Adam	Mr	18/04/1966	374	26/06/2012	Appointment Reminder
1573	ALLEN, Amelia	Miss	30/05/1998	1573	26/06/2012	Appointment Reminder

Accounts (Basic)

SFD v6 also includes a dedicated accounts section. The **Accounts (Basic)** section is split into five parts, Nominal, Bank, Supplier, Product, and End of Day. This section of the manual explains what each feature of **Accounts (Basic)** does and how to use them.

To navigate to this section, click on the Tooth icon in the top left hand side of the screen and select **Accounts (Basic)** from the menu.



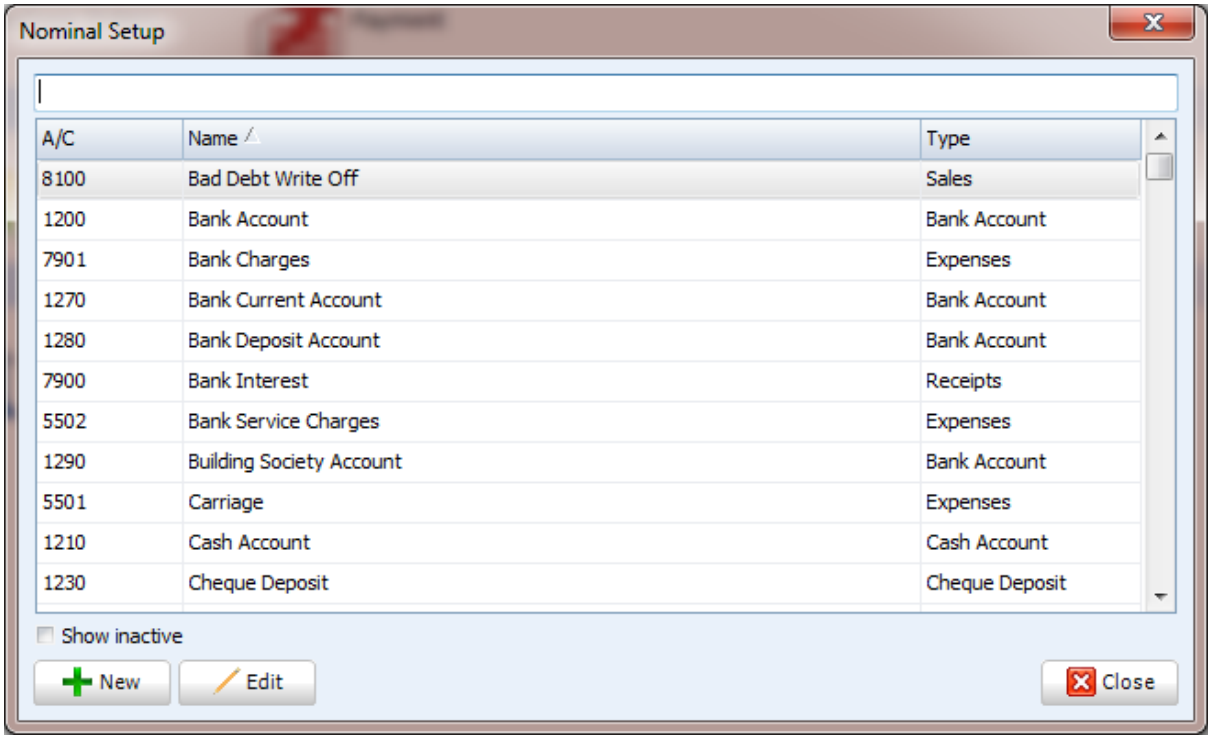
Nominal

Accounts

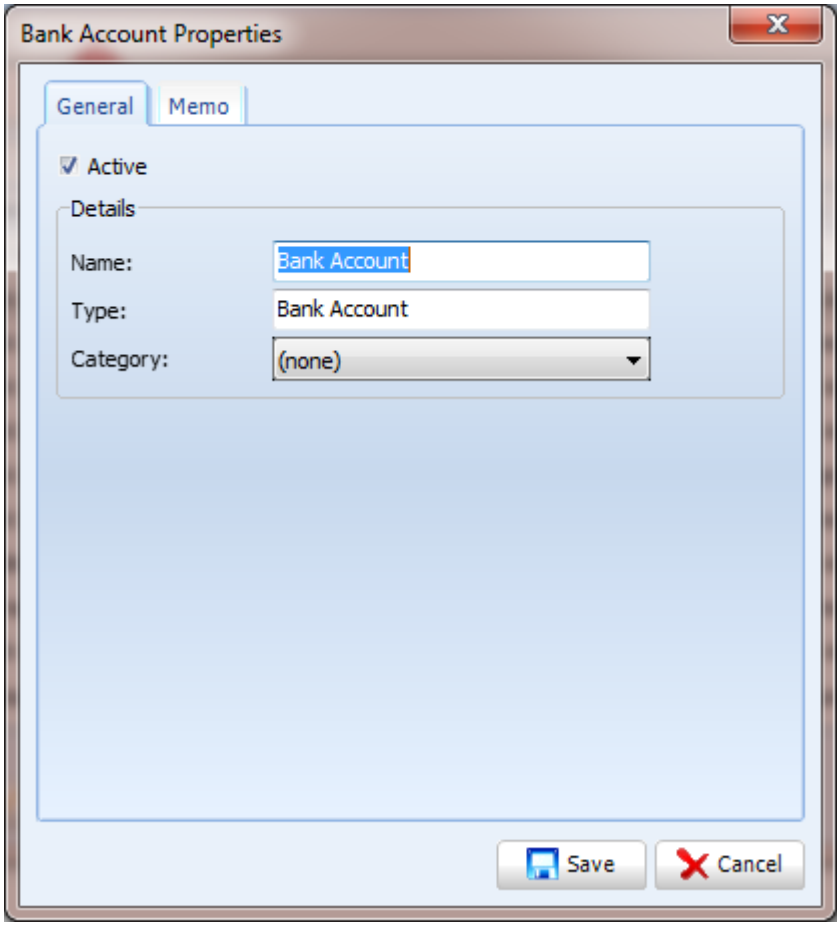
Accounts, is the first feature within the **Nominal** section of **Accounts (Basic)**. This particular feature allows you to create new nominal and edit any existing ones you may already have.

To access this feature, click on the **Accounts** button that is shown below. This is situated under the **Nominal** heading.

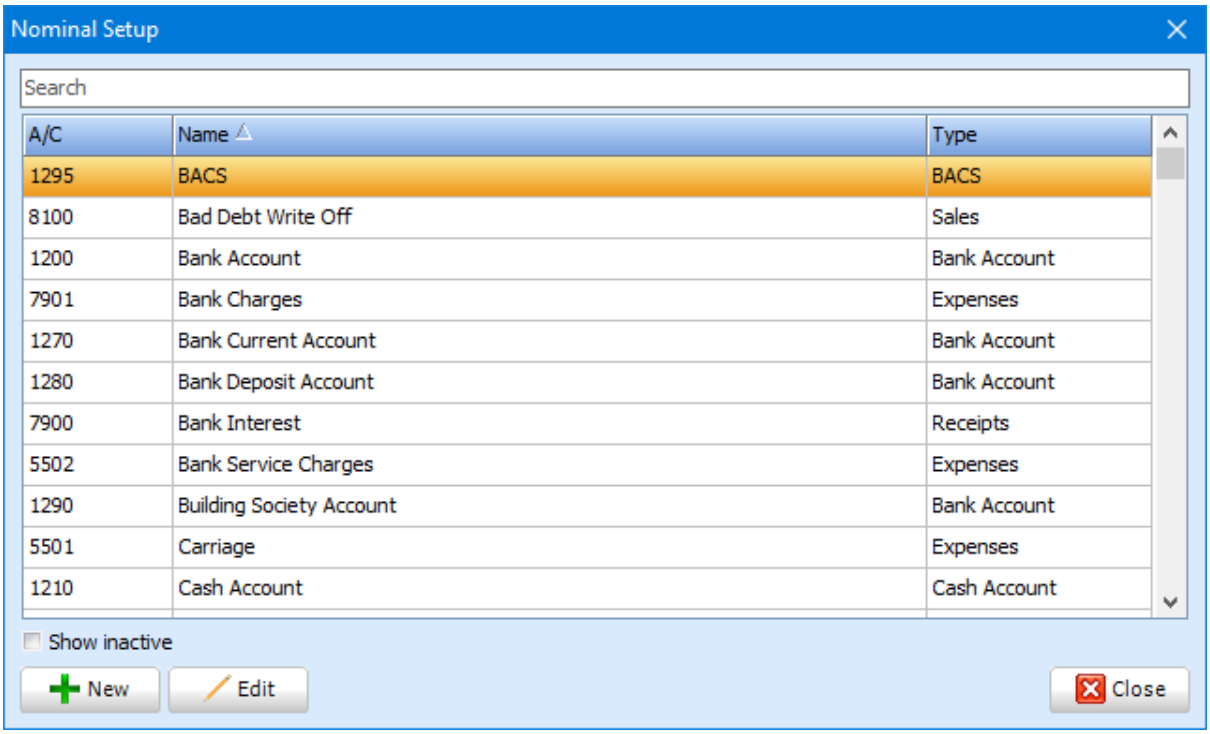
The following window appears once you have clicked on the **Accounts** button.



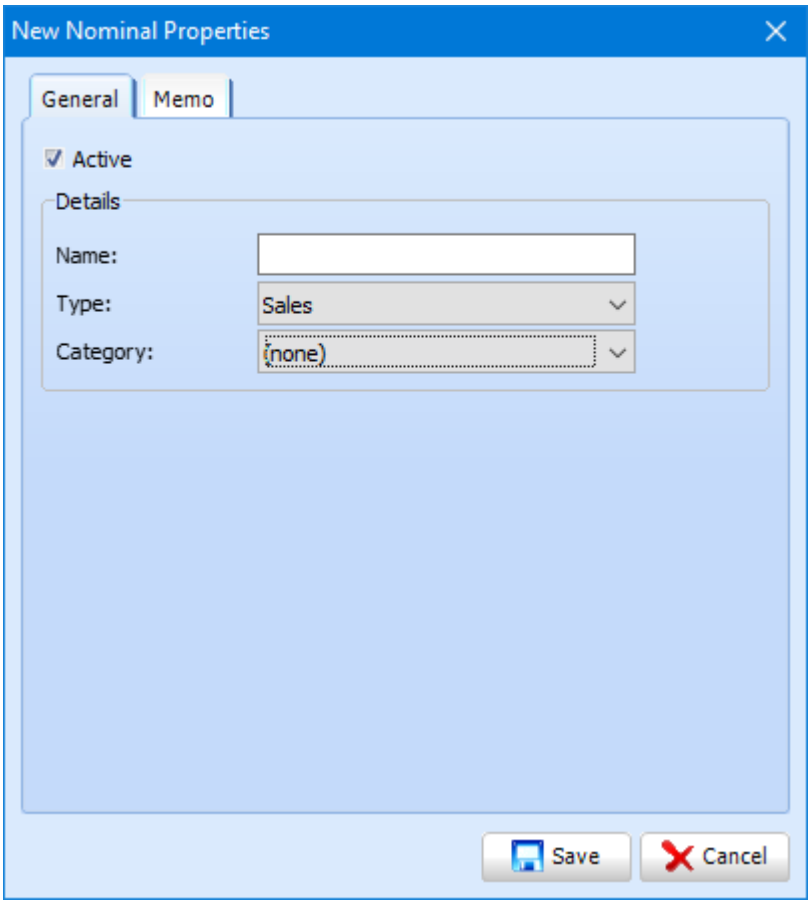
This window shows all existing nominal. Notice at the top of the screen you have a filter so you can easily search for particular nominal. To edit an existing nominal select one from the list by clicking on it, then click the **Edit** button at the bottom of the window. The following window appears.



Make any changes you feel necessary, and then click **Save** in the bottom right of the window to return to the **Nominal Setup** window.

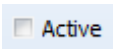


To add a new nominal click **New** in the bottom left hand corner of the window. You will then be presented with the following window.



Add the name of your new nominal into the text box. Then select your type and categories from the dropdown buttons. Once you have added the necessary information click **Save** in the bottom right hand corner of the window.

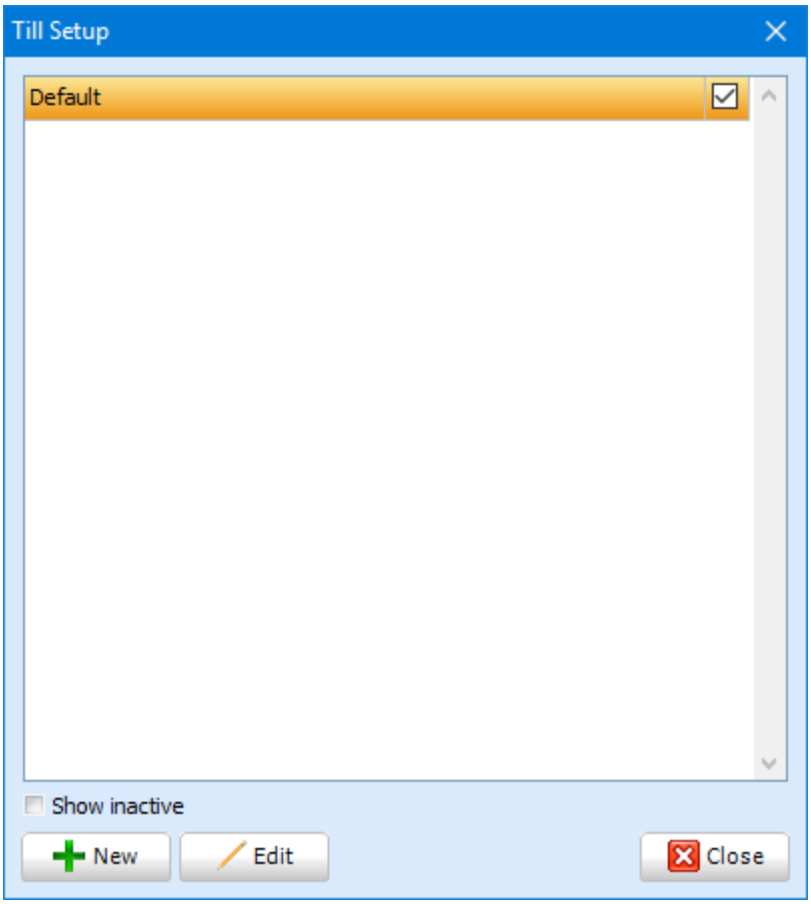
Note: You can deactivate any nominal by unchecking the **Active** checkbox.



Tills

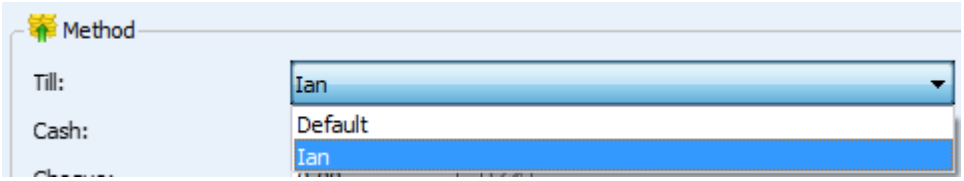
Tills allow you to easily separate money. To access the tills setup, click on the **Tills** button.

Once you have clicked the **Tills** button you will be presented with the following window.



From this window you have the ability to add new tills or edit any existing tills. To add a new till click the **New** button in the bottom left of the window.

Type the name of the till and click **Save**. Now when you take a payment you will be able to select the till you have created.



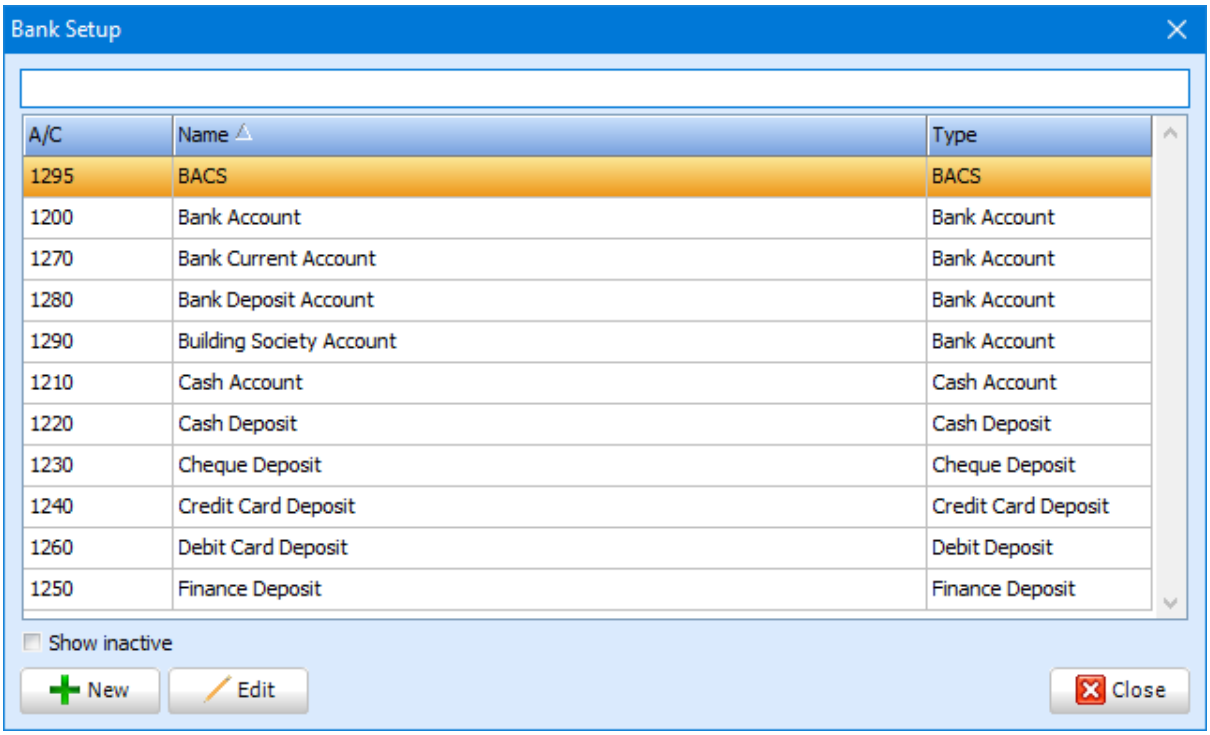
You also have the ability to report on the tills you have set up.

Bank

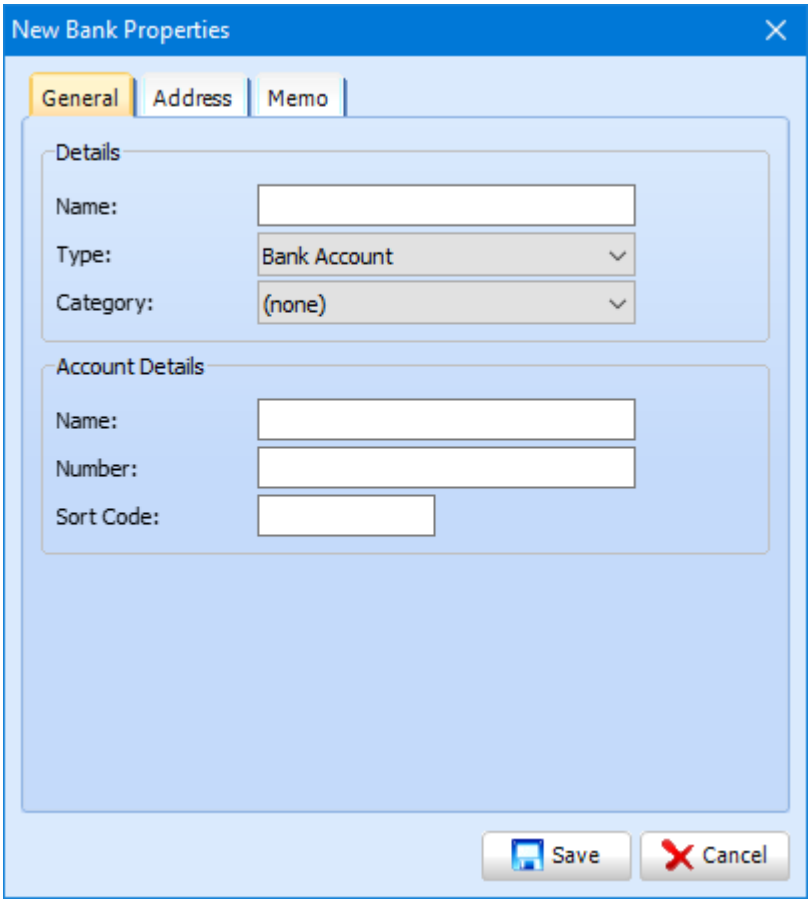
Accounts

Accounts is the first feature within the **Bank** section. To access this feature, click on the **Accounts** button.

You will then be presented with the following window.



From this window you have the ability to edit and create new bank accounts. To create a new bank account, click on **New** in the bottom left hand corner of the screen. The following window appears.

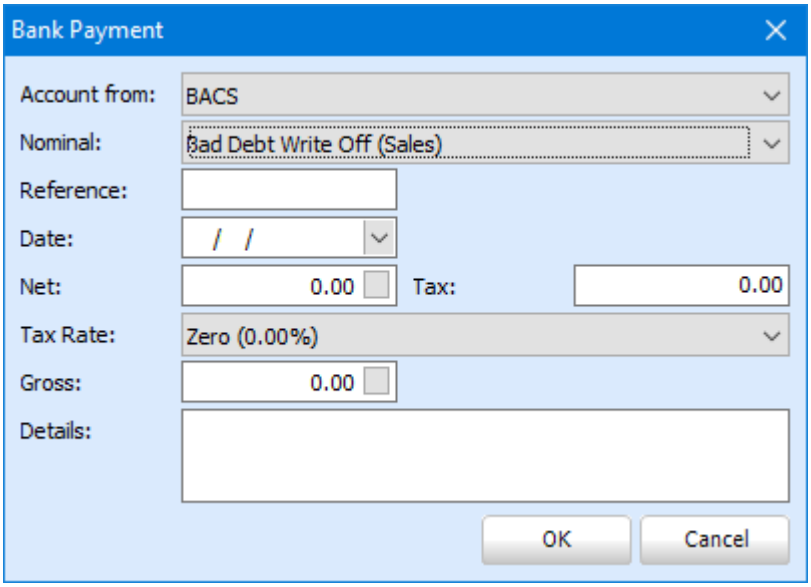


It will open in the **General** tab. Fill out the necessary details such as **Name** and **Type**. You also have an **Address** tab and a **Memo** tab for storing any notes you may wish to add.

Payment

Payment is a feature which allows you to make transactions from your various accounts you have set up. To access the payment feature, click on the **Payment** button.

You will then be presented with the following window.

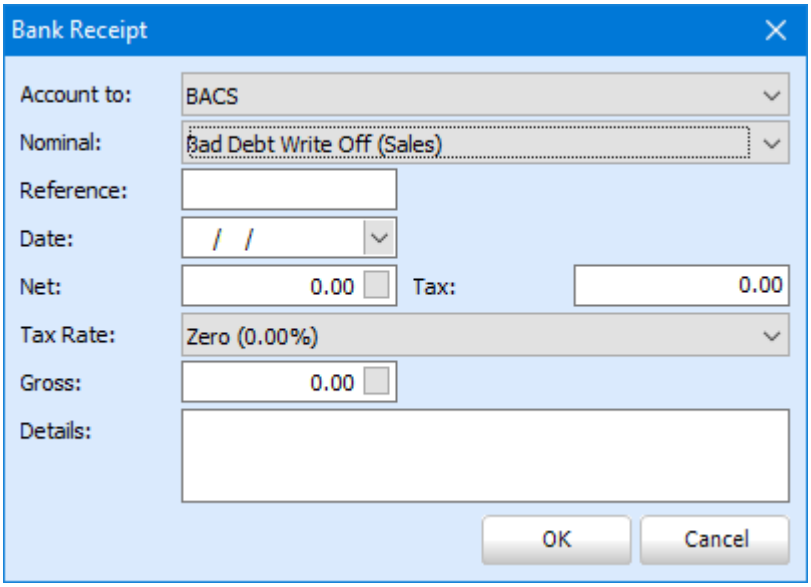


Select the appropriate options from the relevant dropdown buttons and add in figures that are required. Once you have entered the relevant information click **OK** in the bottom right hand corner of the window.

Receipt

The Receipt feature allows you to make transactions into your accounts. To access **Receipt**, click on the **Receipt** button.

You will be presented with the following window.

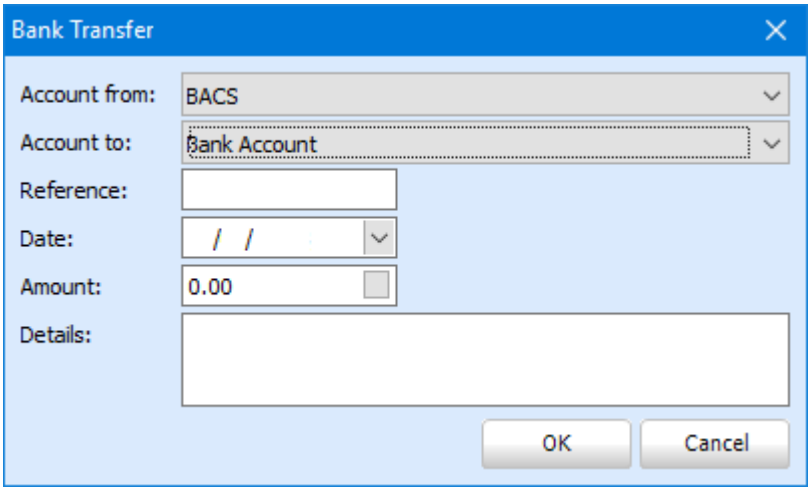


This screen is almost identical to the Payment window with the main difference being that the top dropdown button you are selected which account you are making the transaction to rather than from. Again enter the necessary information and click **OK** to confirm.

Transfer

The next feature within the **Bank** section of **Accounts (Basic)** is transfer. This allows you to transfer money between your accounts. To access this feature, click on the **Transfer** button.

The following window appears.

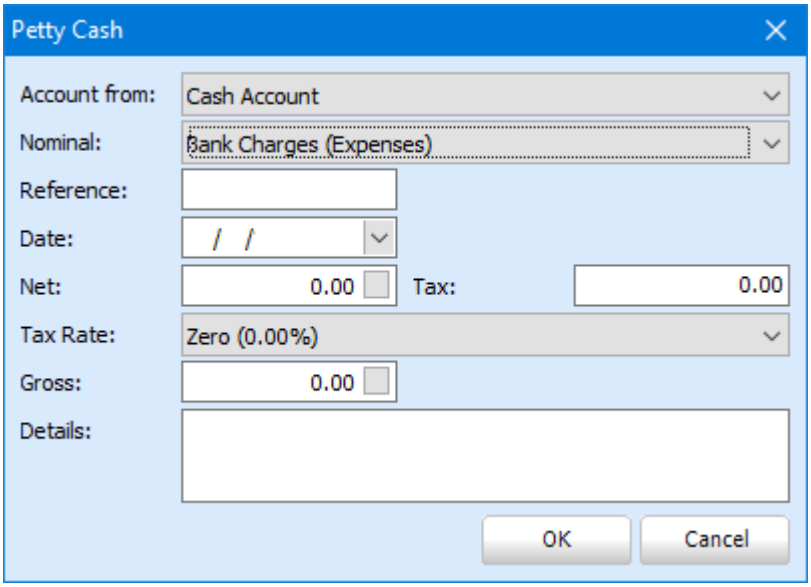


Select the appropriate accounts from the dropdown buttons. Then enter a reference if required into the text box, select a date then enter the required amount. Click **OK** to confirm.

Petty Cash

Petty Cash allows you to keep track of your small sundry expenditure within your dental practice. Click on the Petty Cash button to access this feature.

The following window appears.



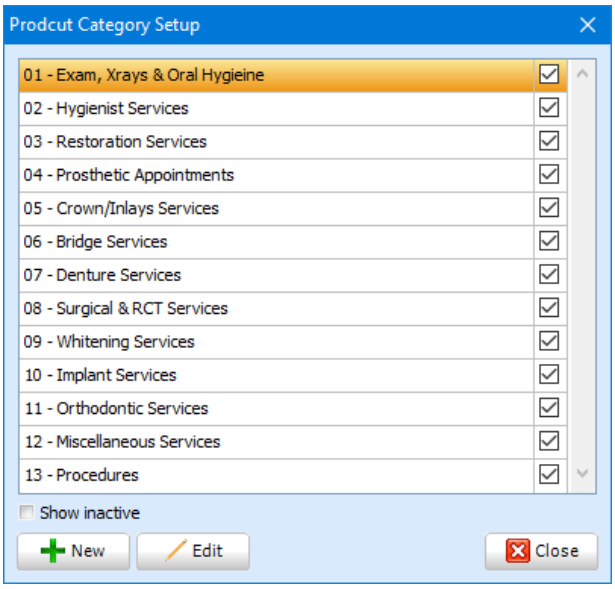
Select the account and nominal from the dropdown buttons at the top of this window. Add the necessary figures and then click **OK** to confirm.

Products

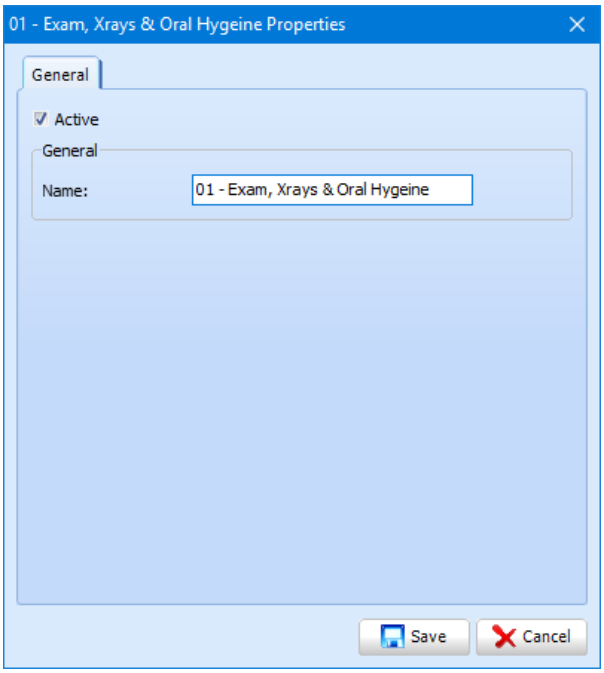
Categories

The **Categories** feature allows you to add categories and edit any existing ones. These are the categories you can choose from within a treatment form (refer to the treatment section of the manual). To access this feature, click on the **Categories** button.

The following window appears.

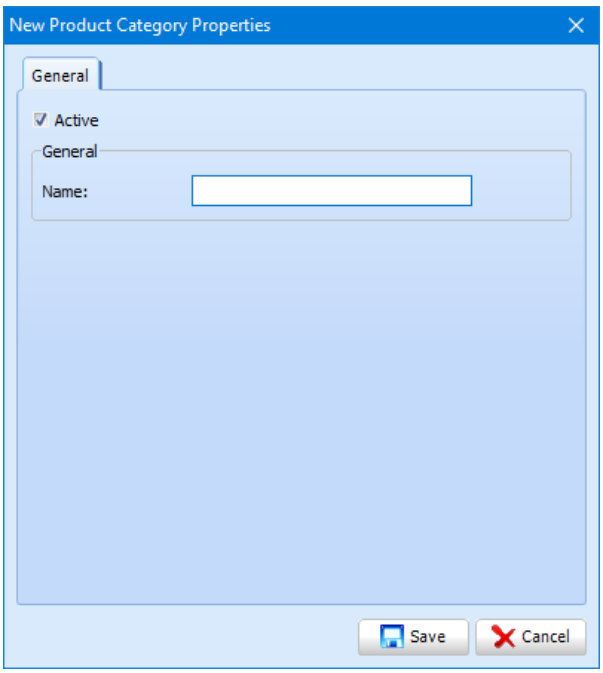


To edit an existing category select from the list, once you have selected the category it appears highlighted. Now the category is selected, click **Edit**. The following window appears.



Make any changes that are required then click **Save** in the bottom right hand corner of the window.

To add a new category, click **New** in the bottom left hand corner of the **Setup** window. The following window appears.



Add the name of your new category then click Save.

To deactivate categories that are no longer required, click **Edit** on the category you no longer need. Then uncheck the **Active** checkbox. This category will no longer be visible within the treatment screen.

Sundry

The **Sundry** feature allows you to report on sundry sales within a certain time period. Click on the **Sundry** button to access this report.

Refer to the reports section of the manual if you require any further information on how to run this report.

Stock

The Stock feature allows you to report on stock usage within a particular time period. Click on the stock button to run this report.

Refer to the reports section of the manual if you require any further information on how to run this report.

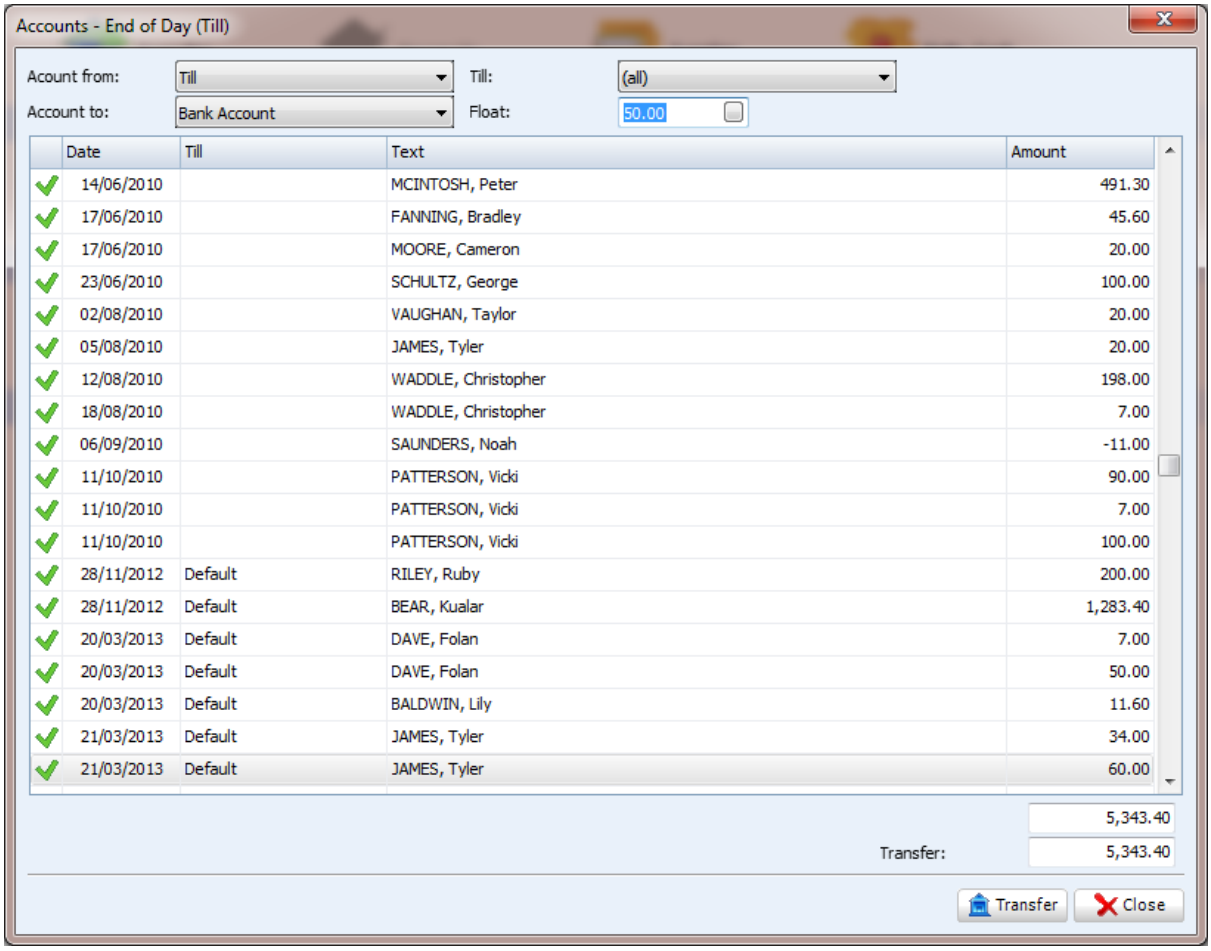
End of Day

Finally you have the end of day section which allows you to view the amount of money the practice has received throughout the day.

Tills

The **Tills** feature allows you to view cash that has been received and allows you to transfer the money to the appropriate account. To access this feature, click on the **Till** icon.

You will be presented with the following window.



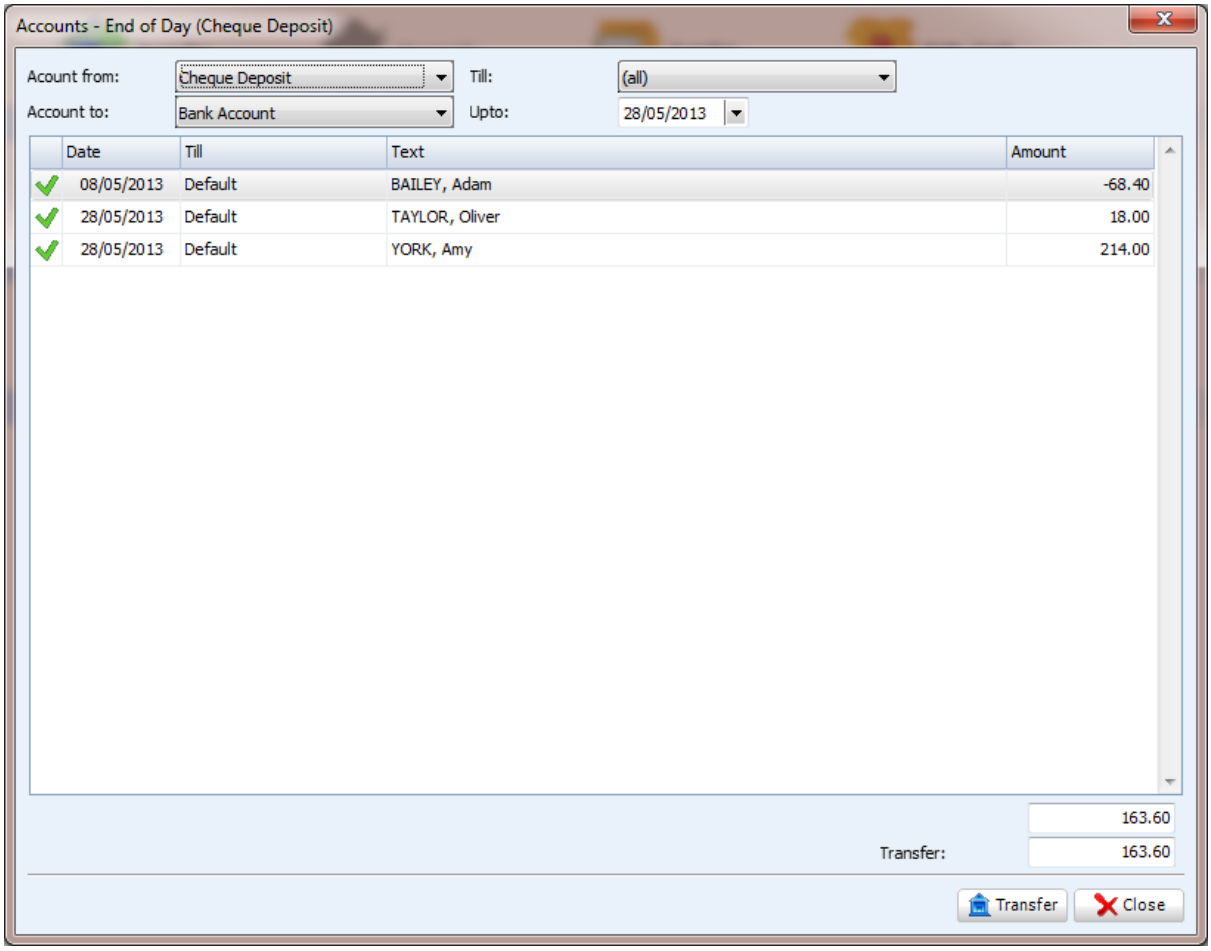
Select the account you wish to transfer the money to. If you have more than one till setup, select the appropriate till from the dropdown button. It is important that you enter a float amount if necessary. Once you have entered all information, click the **Transfer** button in the bottom right hand corner of the window.

Note: *You can remove any transactions you don't wish to transfer by selecting the transaction by clicking on it, once selected press the spacebar on your keyboard. The green tick next to the transaction will then disappear.*

Cheque

The **Cheque** feature allows you to view any cheque deposits made up to a certain date since the last transfer. To access this, click on the **Cheque** button.

The following window appears after clicking on this button.



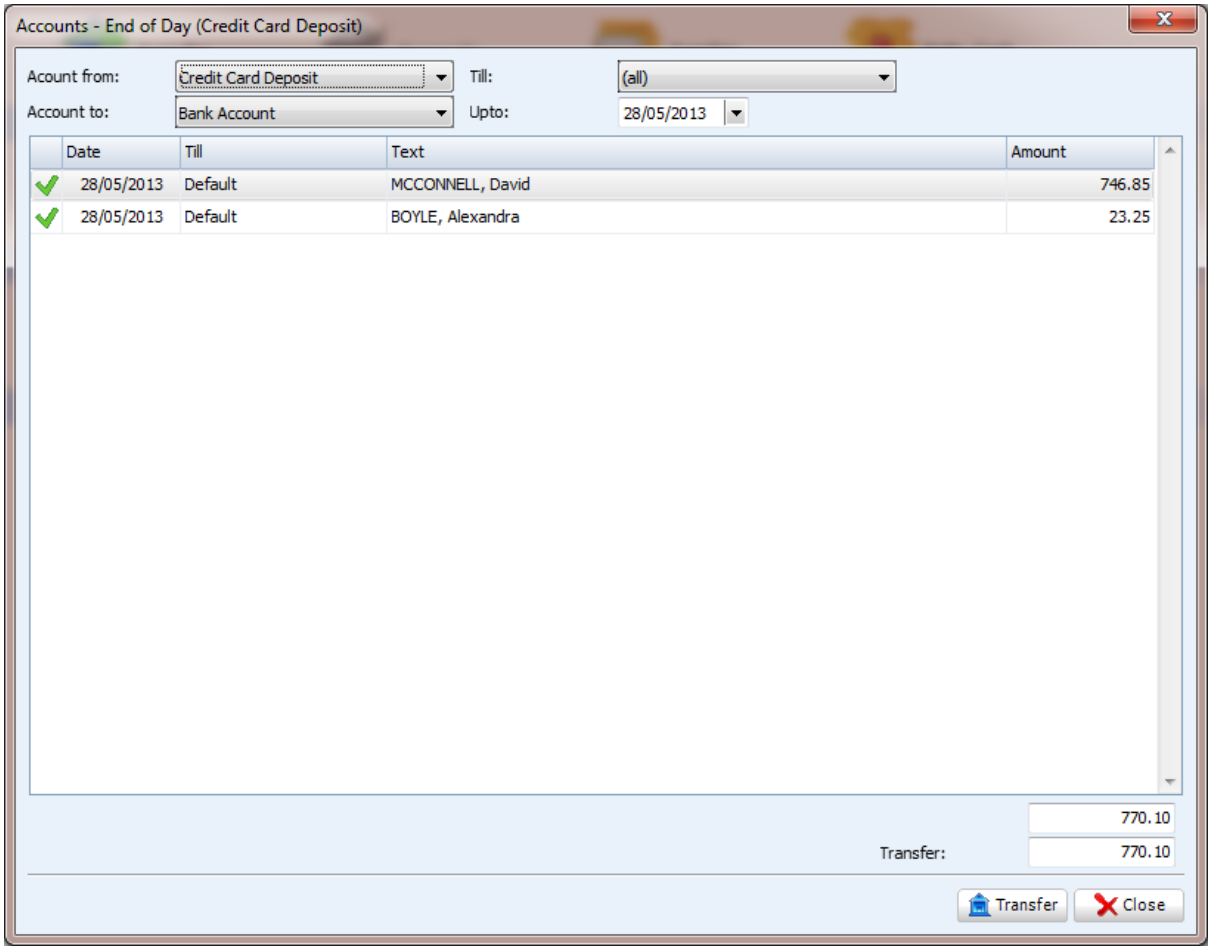
Again select the account you wish to transfer the money to. Select the date you wish to view transactions up to. Select the appropriate till(s) from the dropdown buttons. Click **Transfer** to once you are happy with your selections.

Note: *You can remove any transactions you don't wish to transfer by selecting the transaction by clicking on it, once selected press the spacebar on your keyboard. The green tick next to the transaction will then disappear.*

Card

The **Card** feature allows you to view any card deposits made up to a certain date since the last transfer. To access this, click on the **Card** button.

The following window appears after clicking on this button.

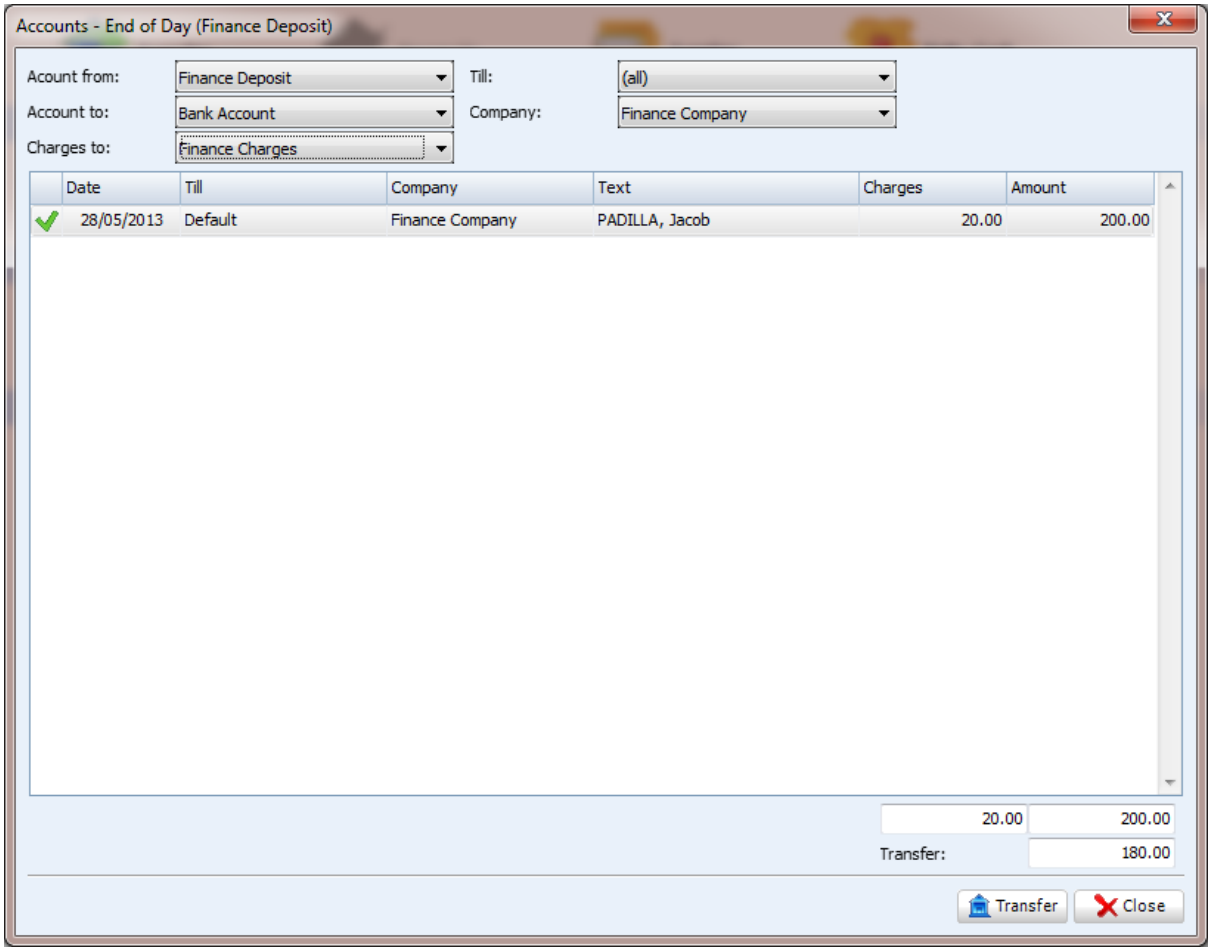


Firstly, select the account you wish to transfer the money to. Select the date you wish to view transactions up to. Select the appropriate till(s) from the dropdown buttons. Click **Transfer** to once you are happy with your selections.

You can remove any transactions you don't wish to transfer by selecting the transaction by clicking on it, once selected press the spacebar on your keyboard. The green tick next to the transaction will then disappear.

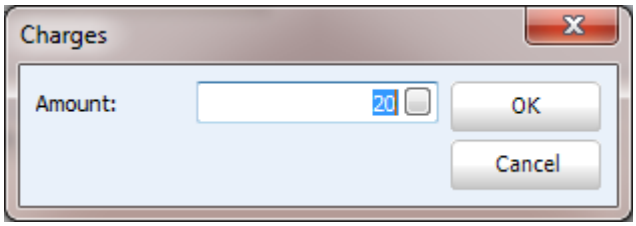
Finance

Finance allows you to view and transfer any finance transactions. You can also assign a charge for the finance company within this feature. To access this feature, click on the **Finance** button.

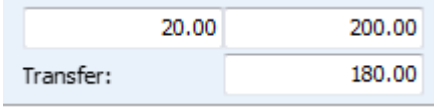


Select the correct accounts the money is being transferred from and to. Finally select the finance company from the dropdown.

To add a charge value to a transaction, click within the charges column of the desired transaction. The following window appears.



Enter the desired amount and click OK to confirm. This will update the figure in the bottom right hand corner of the **Finance Deposit** window.

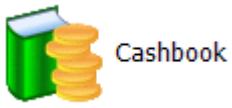


Click **Transfer** once you have added all the necessary information.

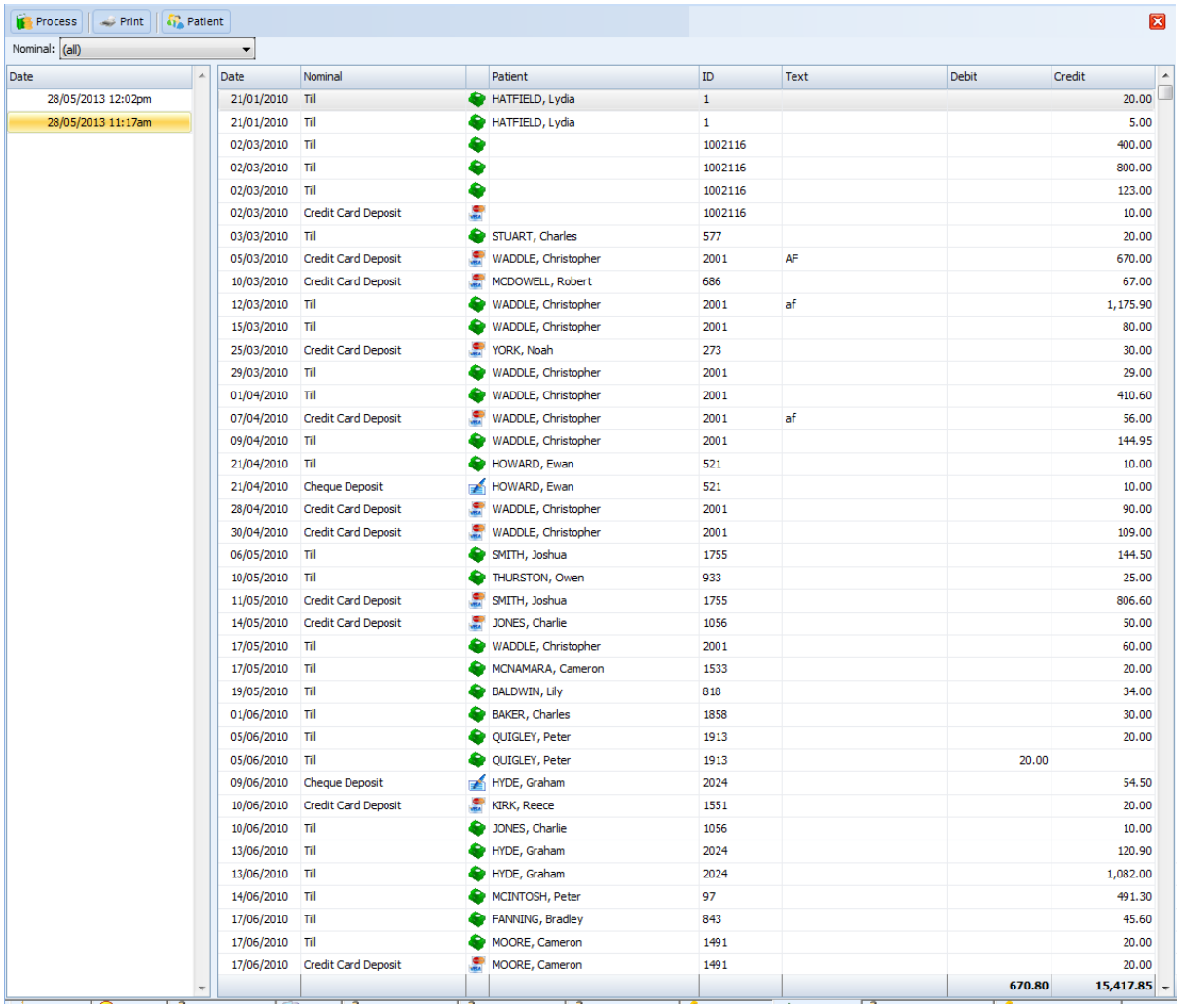
Note: *You can remove any transactions you don't wish to transfer by removing the green tick by clicking on it.*

Cashbook

The final feature within **Accounts (Basic)** is **Cashbook**. To access this feature, click on the **Cashbook** button.



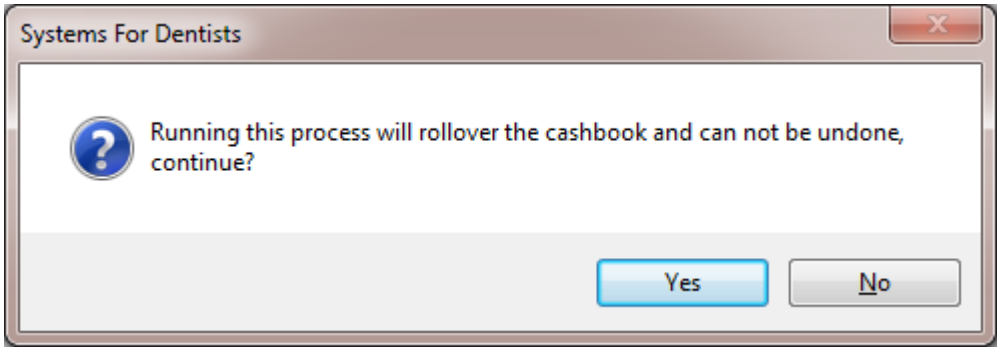
You will be presented with the following screen after clicking on this button.



Date	Nominal	Patient	ID	Text	Debit	Credit
21/01/2010	Till	HATFIELD, Lydia	1			20.00
21/01/2010	Till	HATFIELD, Lydia	1			5.00
02/03/2010	Till		1002116			400.00
02/03/2010	Till		1002116			800.00
02/03/2010	Till		1002116			123.00
02/03/2010	Credit Card Deposit		1002116			10.00
03/03/2010	Till	STUART, Charles	577			20.00
05/03/2010	Credit Card Deposit	WADDLE, Christopher	2001	AF		670.00
10/03/2010	Credit Card Deposit	MCDOWELL, Robert	686			67.00
12/03/2010	Till	WADDLE, Christopher	2001	af		1,175.90
15/03/2010	Till	WADDLE, Christopher	2001			80.00
25/03/2010	Credit Card Deposit	YORK, Noah	273			30.00
29/03/2010	Till	WADDLE, Christopher	2001			29.00
01/04/2010	Till	WADDLE, Christopher	2001			410.60
07/04/2010	Credit Card Deposit	WADDLE, Christopher	2001	af		56.00
09/04/2010	Till	WADDLE, Christopher	2001			144.95
21/04/2010	Till	HOWARD, Ewan	521			10.00
21/04/2010	Cheque Deposit	HOWARD, Ewan	521			10.00
28/04/2010	Credit Card Deposit	WADDLE, Christopher	2001			90.00
30/04/2010	Credit Card Deposit	WADDLE, Christopher	2001			109.00
06/05/2010	Till	SMITH, Joshua	1755			144.50
10/05/2010	Till	THURSTON, Owen	933			25.00
11/05/2010	Credit Card Deposit	SMITH, Joshua	1755			806.60
14/05/2010	Credit Card Deposit	JONES, Charlie	1056			50.00
17/05/2010	Till	WADDLE, Christopher	2001			60.00
17/05/2010	Till	MCNAMARA, Cameron	1533			20.00
19/05/2010	Till	BALDWIN, Lily	818			34.00
01/06/2010	Till	BAKER, Charles	1858			30.00
05/06/2010	Till	QUIGLEY, Peter	1913			20.00
05/06/2010	Till	QUIGLEY, Peter	1913		20.00	
09/06/2010	Cheque Deposit	HYDE, Graham	2024			54.50
10/06/2010	Credit Card Deposit	KIRK, Reece	1551			20.00
10/06/2010	Till	JONES, Charlie	1056			10.00
13/06/2010	Till	HYDE, Graham	2024			120.90
13/06/2010	Till	HYDE, Graham	2024			1,082.00
14/06/2010	Till	MCINTOSH, Peter	97			491.30
17/06/2010	Till	FANNING, Bradley	843			45.60
17/06/2010	Till	MOORE, Cameron	1491			20.00
17/06/2010	Credit Card Deposit	MOORE, Cameron	1491			20.00
					670.80	15,417.85

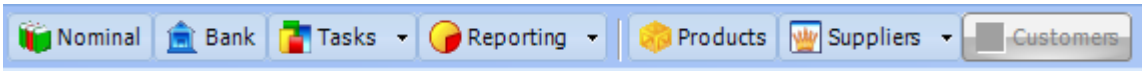
On the left hand side you have a date panel. To view the transactions included within a particular days cashing up, click on a day in the date panel. The select day will be highlighted in yellow. You can also filter the nominal using the dropdown button in the top left hand corner of the screen.

To cash up, click **Process** in the top left hand corner of the screen. The following dialog box appears.



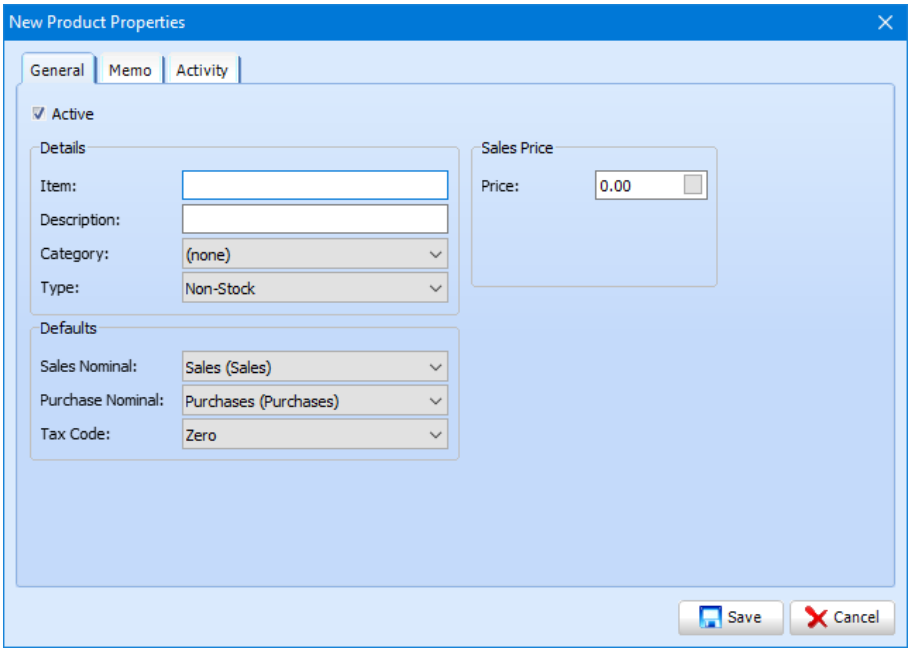
Click **Yes** to confirm.

Accounts (Full)



Sundry items/Products

To manage your sundry items, click on the **Products** tab. To create a new product click **New**. The below screen then appears where you can enter the **Item** (code) and **Description** (Name) as well as a price.



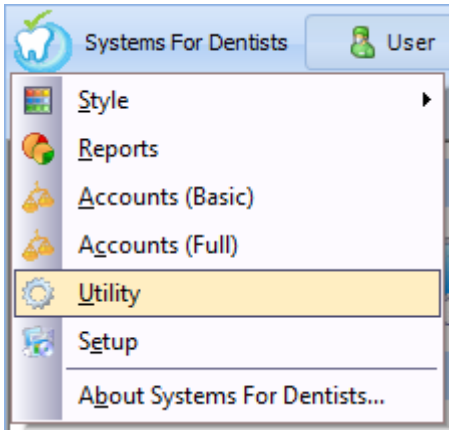
Ensure that the Type is set to sundry.

Accounts (Full) information

This section of the manual is coming soon.

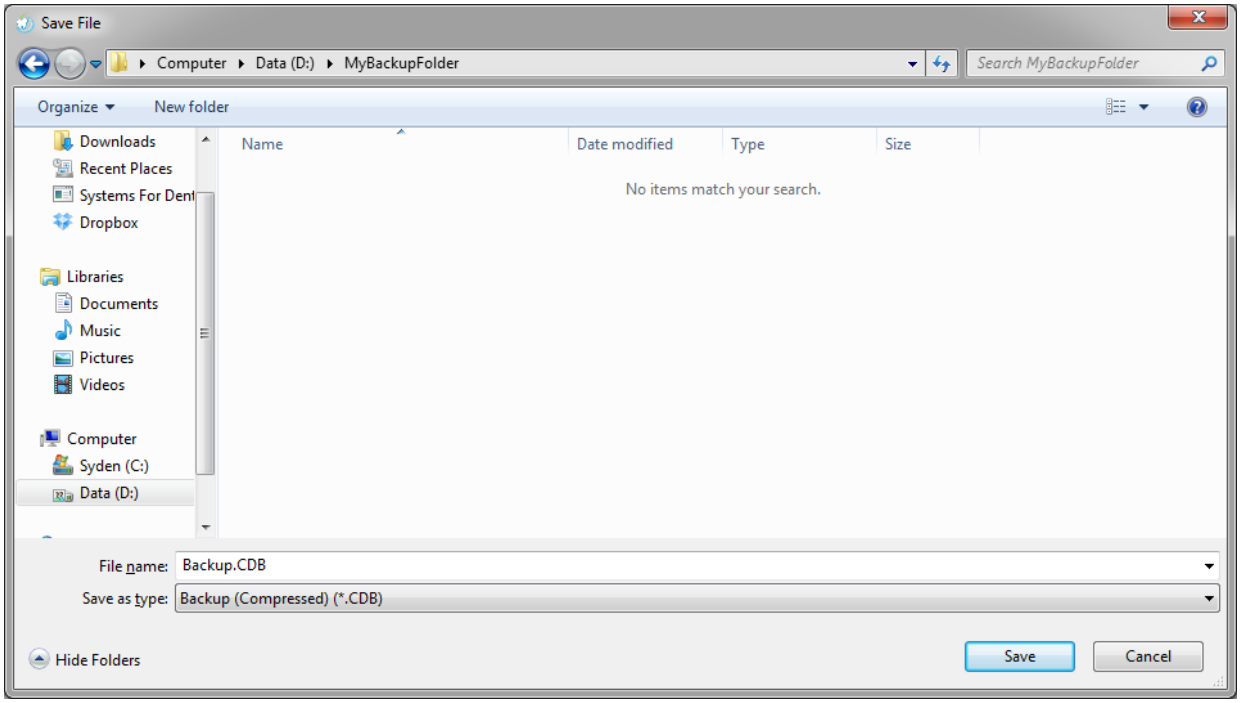
Utility

To access the Utility screen in SFD v6, click on the **Tooth icon** at the top left hand corner of the screen then select **Utility**.



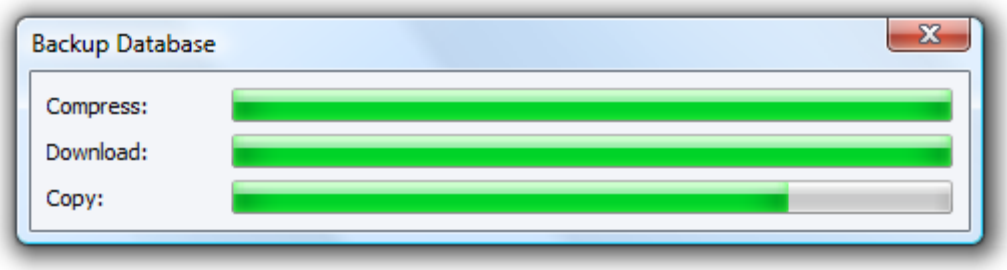
Backup

To run a manual backup, click on the **Backup** button under the general section.



Browse to the drive or folder you would like your backup saved into and select from the file type either compressed (*.CDB) or uncompressed (*.FDB) and click **Save**.

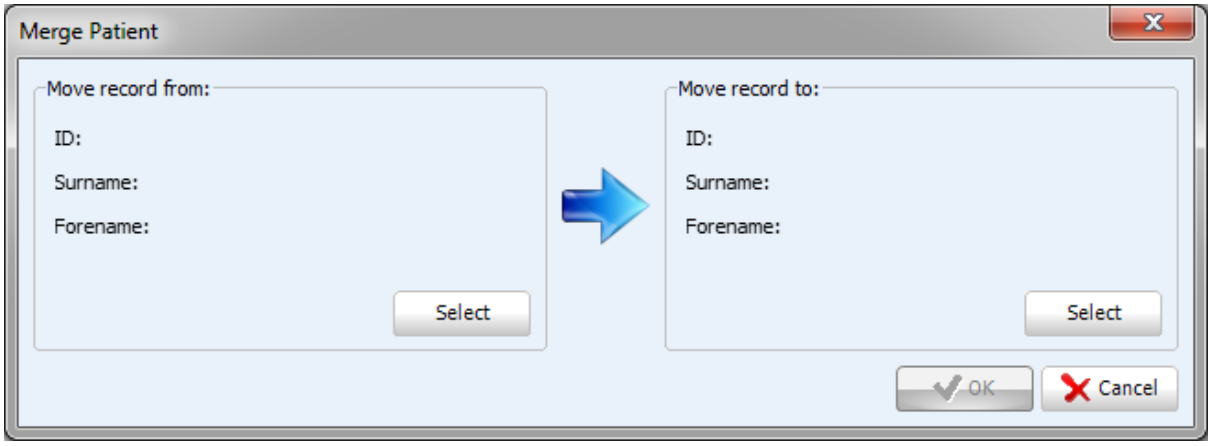
Now the following window appears and the backup is in progress. Once the process is complete you should be faced with a message stating that the backup has completed successfully.



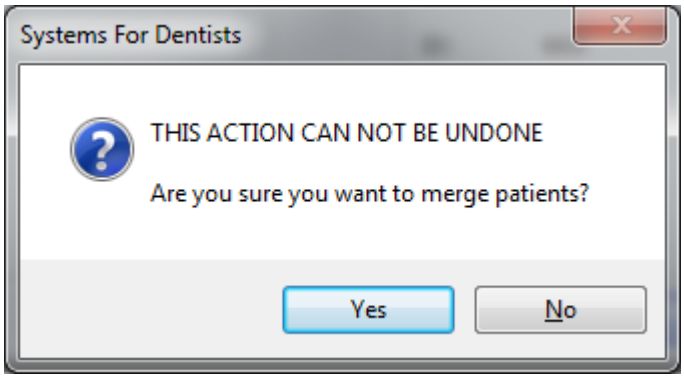
If you receive an error message during this process please call support on **0845 643 2727** and one of our friendly team will be more than happy to assist you.

Merge Patient

There may be times where the same patient exists on your system twice. SFD v6 gives you the ability to merge patient so you can combine information on both patient's into one. To perform this action click on the **Merge Patient** button under the **General** section of the **Utility** screen.



Click **Select** to select the patient you wish to move the record from. Now do the same for the patient you wish to move the record to. Once you have done this click **OK** to merge your patients. You will then be warned that this action cannot be reversed via the Dialogue box shown below.

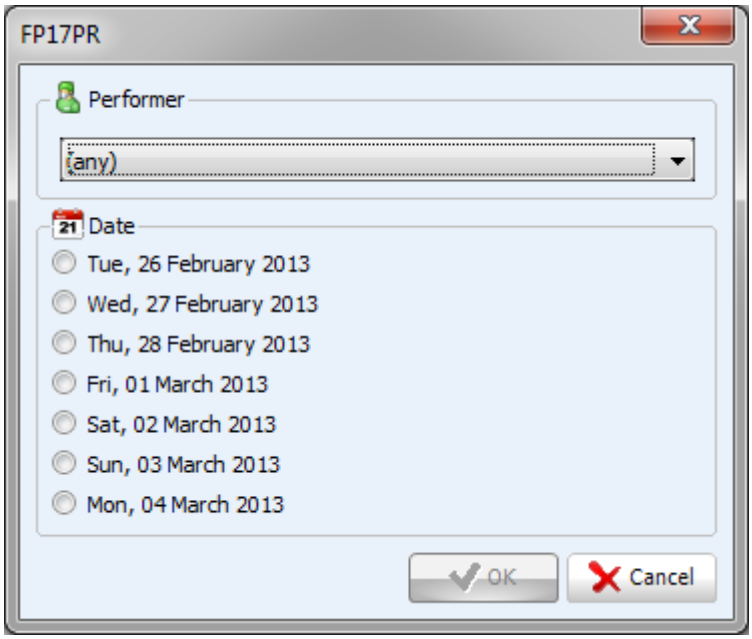


After clicking **Yes** you have successfully merged your patients into one.

FP17

The **FP17** utility allows you to print FP17 forms in bulk for a particular day rather than printing them out individually for each patient. To perform this action, click on the **FP17PR** button.

After clicking the button you will be presented with the following window.

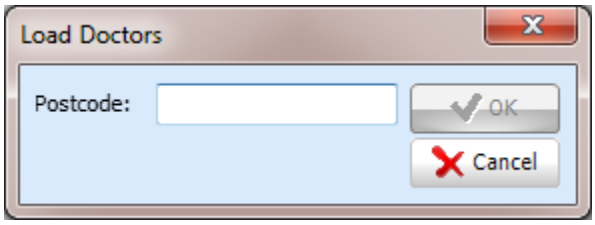


If you only wish to print for a particular performer, select from the **Performer** dropdown list. Once you have selected your performer(s), select the day you wish to print the FP17 forms out for. Click **OK** to confirm.

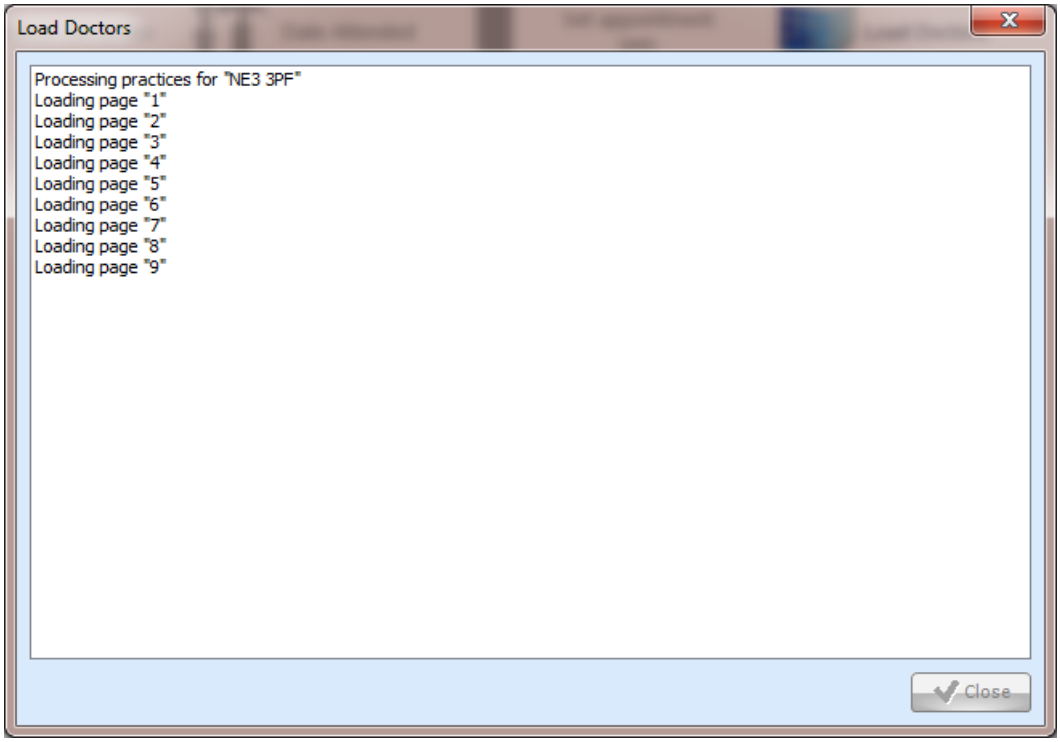
Load Doctors

Rather than typing out all local doctors manually, SFD v6 has the ability to load all of these automatically. To do this, click on the **Load Doctors** button.

The window below appears, enter the postcode of your practice and click **OK**.



The **Load Doctors** window appears.



The system is now loading in all the local doctors within a 5km radius. Once the system has finished adding in all the doctors there will be an **All Done** message in the window above, click **Close**.

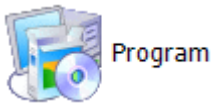
content supplied by NHS choices

Setup

To access setup click the tooth icon then setup.

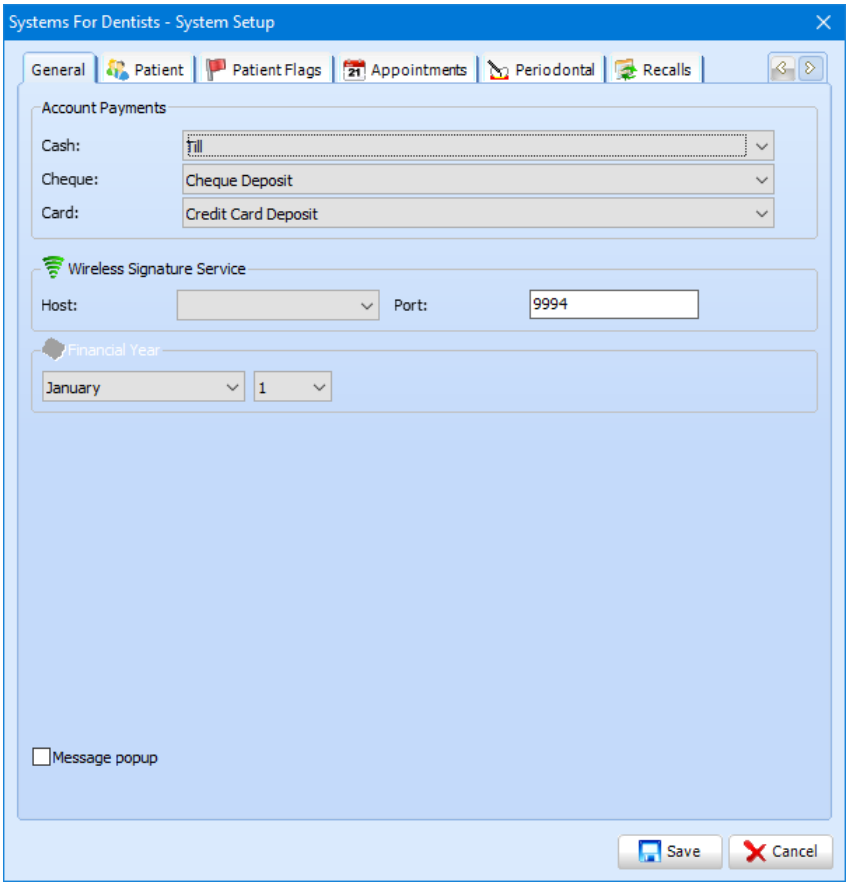
Program

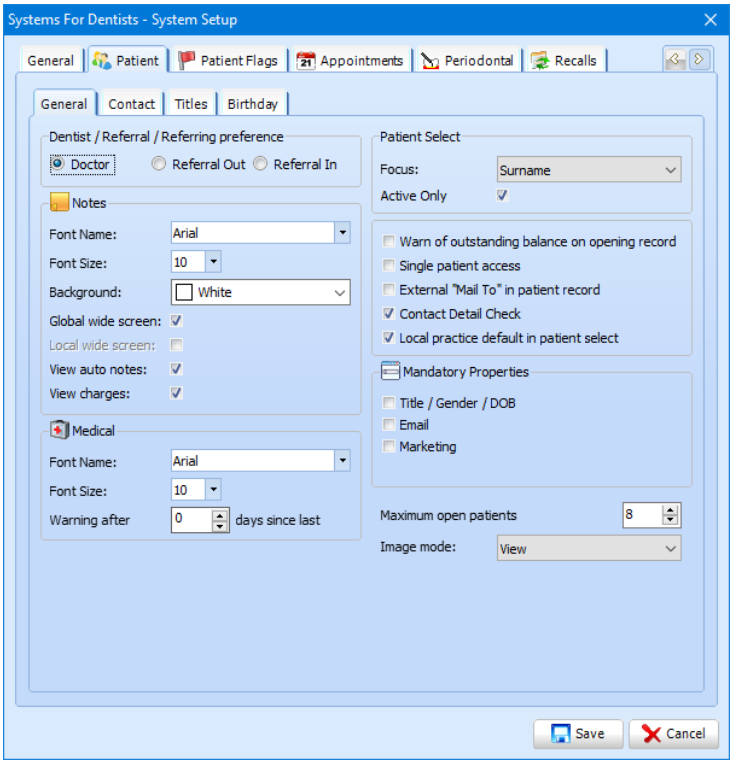
The program setup screen allows you to change defaults pertaining to the overall function of SFD. To access the program setup, click on the **Tooth icon** at the top left and then select **Setup**. Click on the **Program** button, which is located under **System Bar.**



The **Systems For Dentists – System Setup** window appears. Within this window are various tabs which you can go through.

The first tab is General, within this tab you can change the default cash, cheque and card nominal's as well as change the financial year start details.

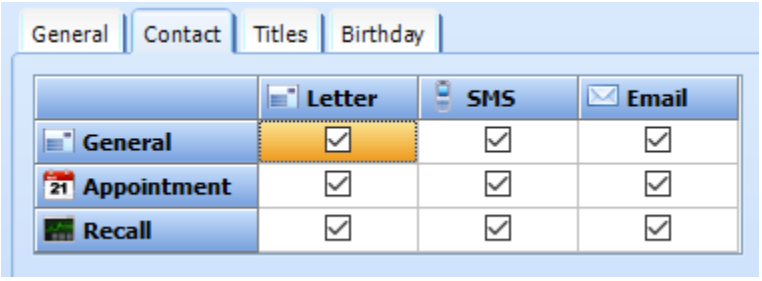




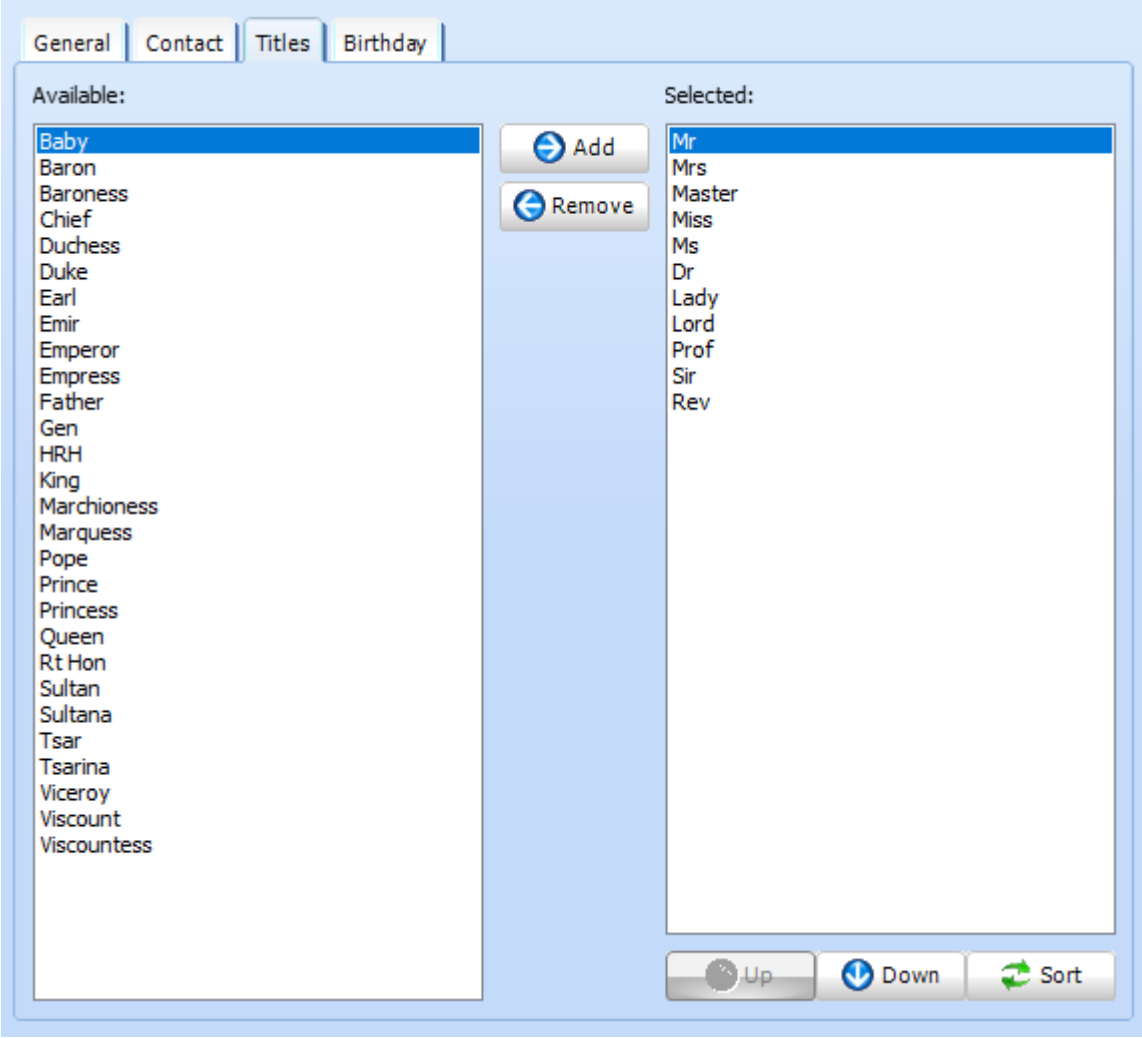
Next is the **Patient** tab. Within here you can change certain defaults pertaining to the patient. You can change whether to see the patient's doctor, referral in or out dentist and practice when viewing their record. Within **Notes**, You can change the default formatting options for writing notes. Wide screen notes allow you to view the proposed/completed treatment alongside the notes. This feature can be turned on for you (Local wide screen) or for all users (Global wide screen).

Auto notes are notes that are automatically entered based on treatment that has been completed with the treatment and the cost.

Other defaults such as patient search and information options can be set here as well on the right hand side.

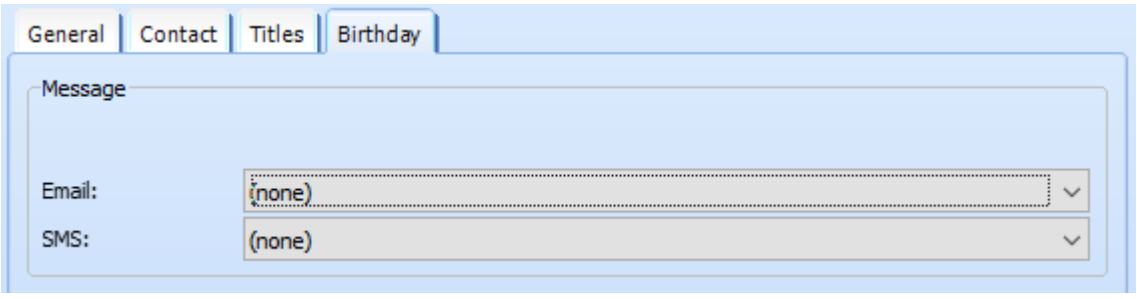


The **Contacts** sub tab allows you set defaults for how the patients within your system are contacted. For example if you wanted your patients to be contacted via SMS, Letter and Email for all appointment correspondence, you would click all the checkboxes along the **Appointment** row.

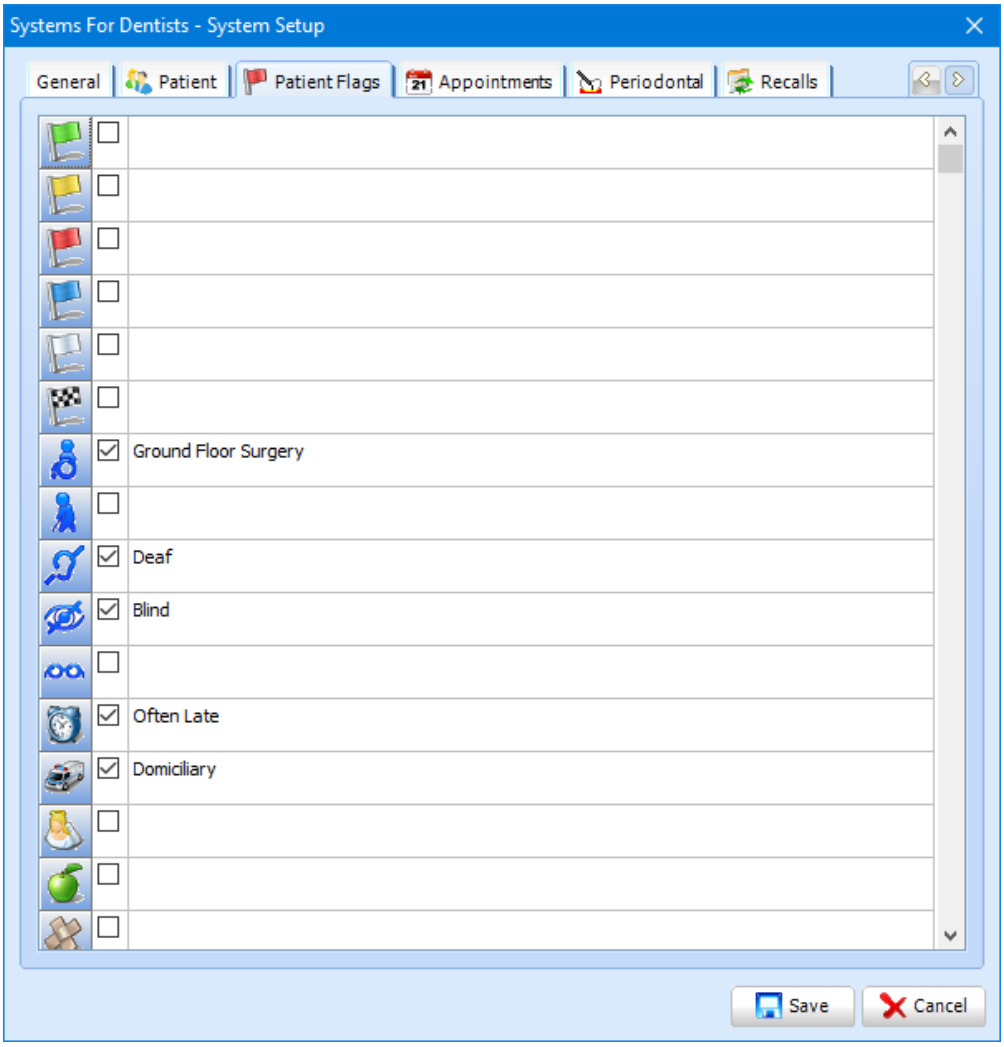


Within the **Title** sub tab, you can manage patient titles within the system. Double click a title to move it to the opposite side of the screen. Titles on the left are ones available to you whereas ones on the right are titles that are active.

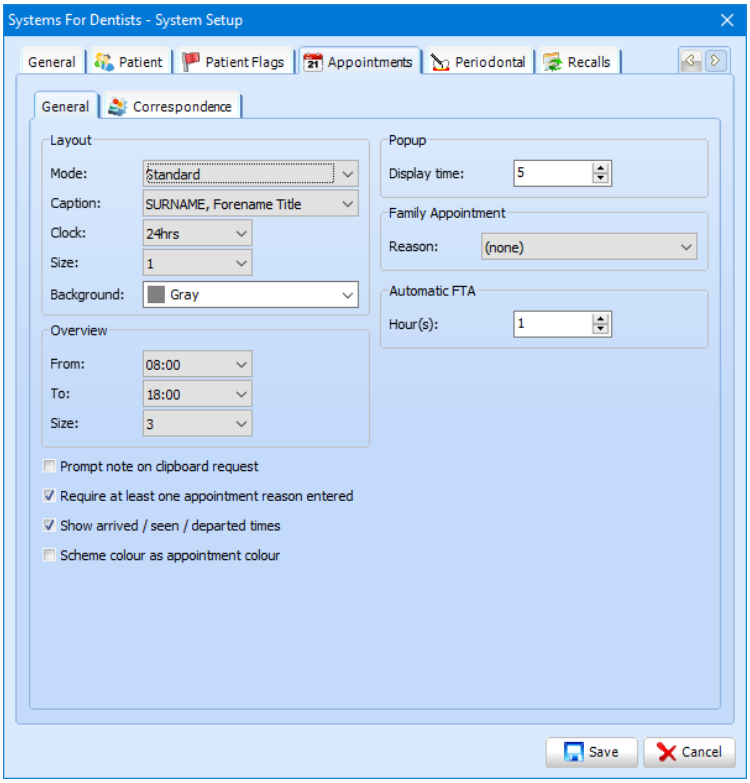
Sort will sort the titles alphabetically.



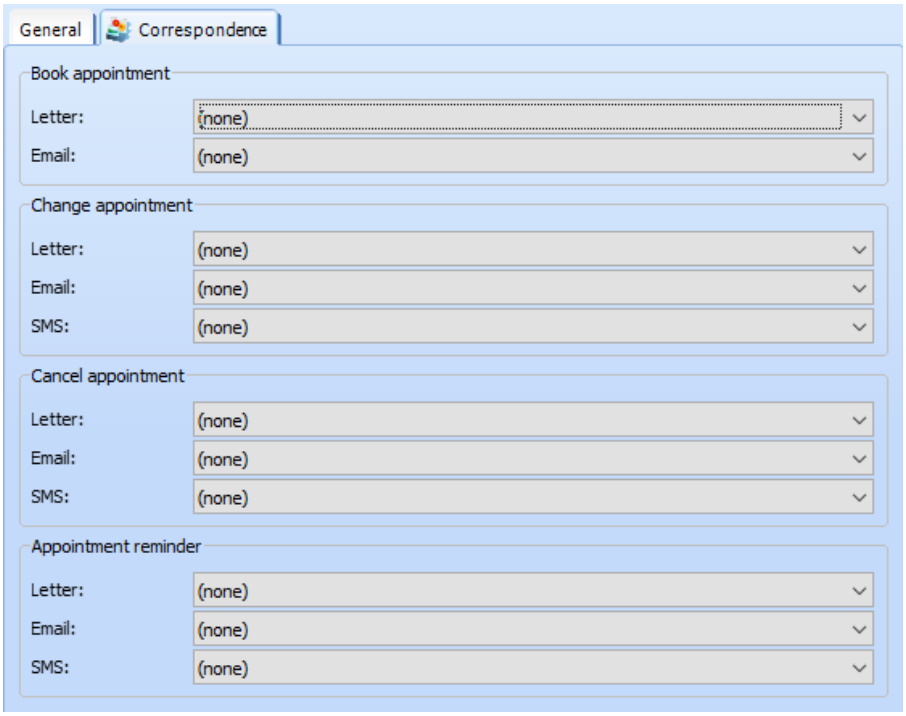
Within the **Birthday** tab you can set an email and/or SMS message to be sent to a patient on their birthday.



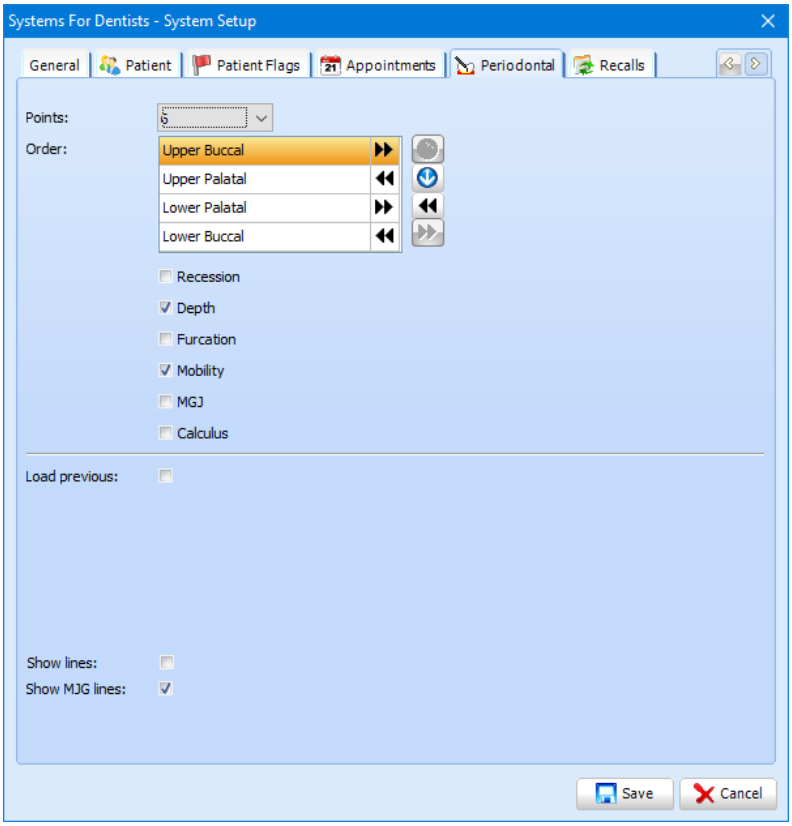
The **Patient Flag** tab allows you to select flags which can then be applied onto a patient record. To activate a flag tick the corresponding box and enter a description on the right.



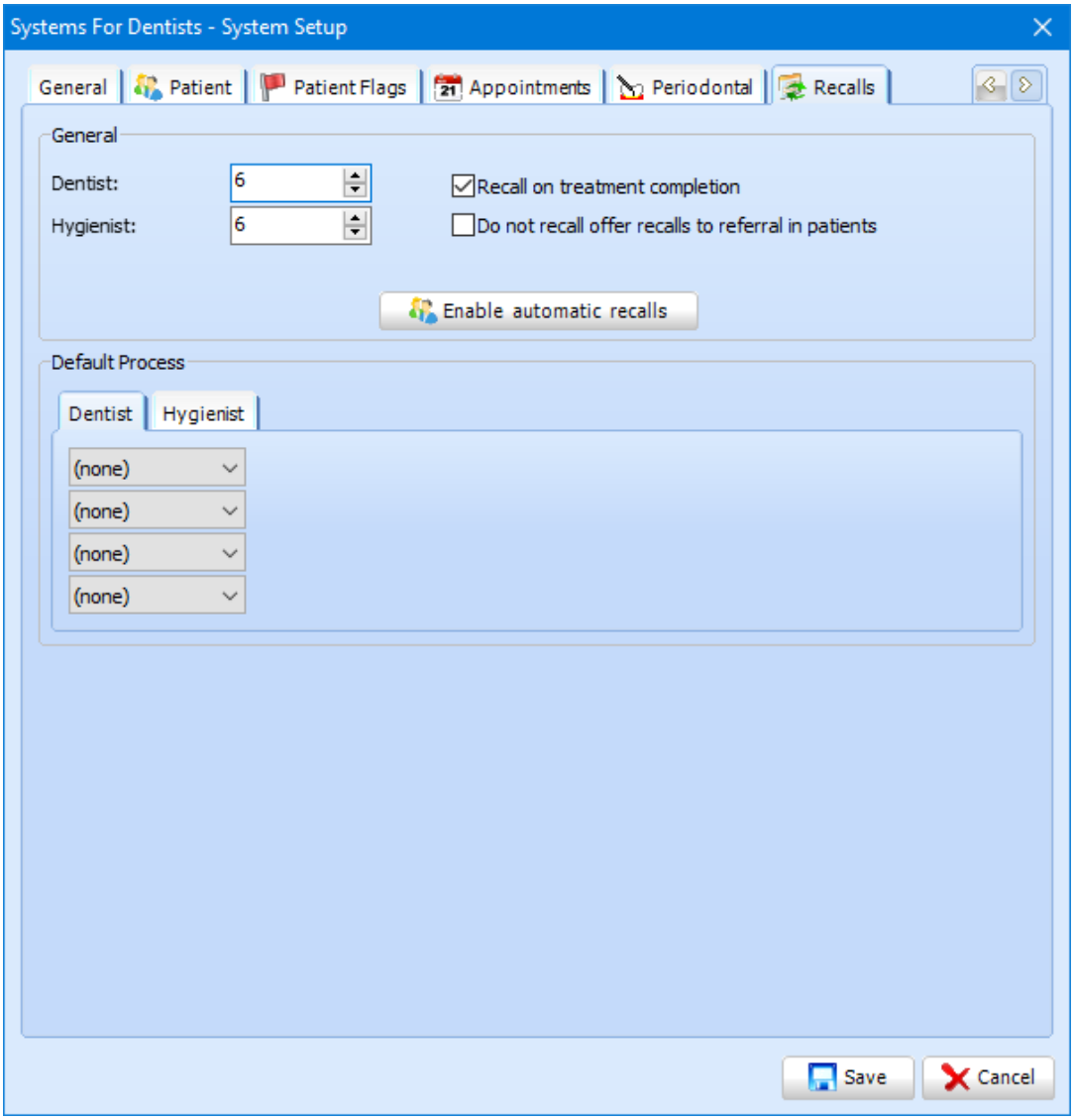
Within the **Appointments** tab you are able to select defaults for your appointment book such as how performer names appear (**Caption**) the amount of hours shown in one day (**Overview**) as well as requiring a reason when booking an appointment (**Require at least one appointment reason entered**).



Within the **Appointments** tab still, there is a **Correspondence** sub tab. Within here you are able to select the default letter, email and SMS to patients when certain actions are performed. You are able to pick and choose contact methods per action.



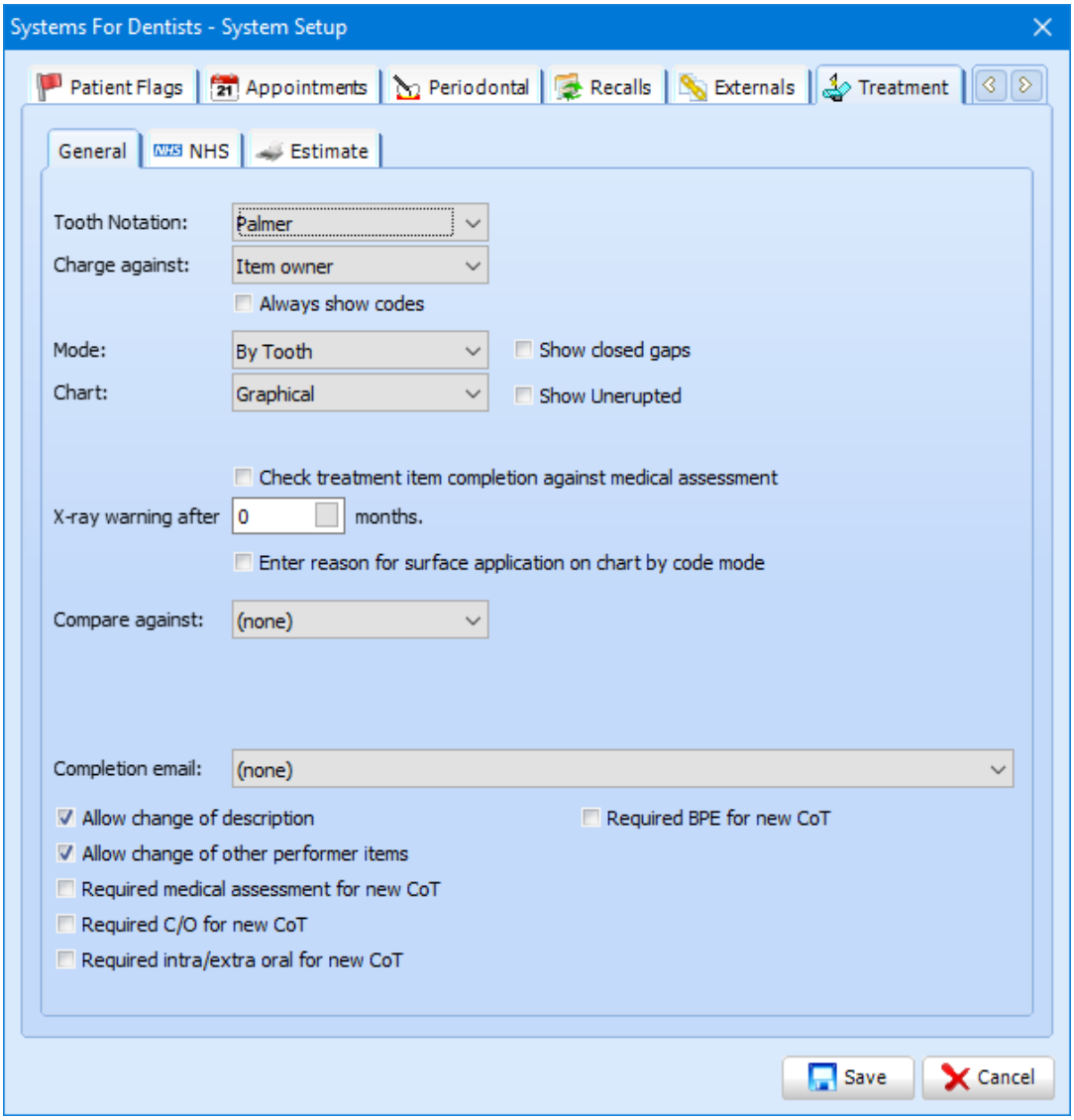
Within the **Periodontal** Tab you are able to change the default settings for when a new periodontal exam is created. You can change the number of points on the tooth itself by clicking on the drop down list at the top of the window. You can also change the order and direction of how you complete your exam, by using the up, down, left and right arrows.



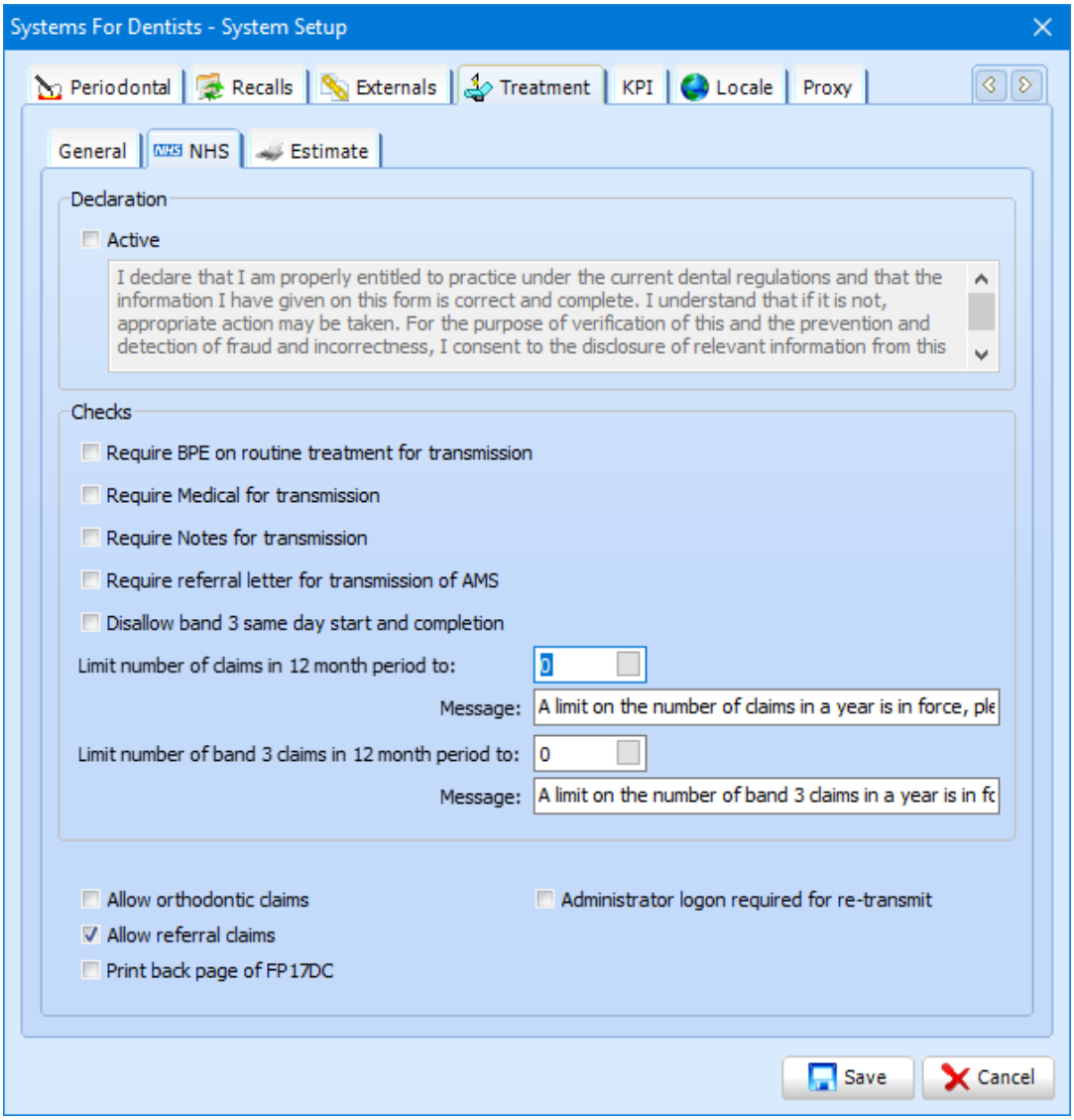
The **Recalls** allows you to set the default recall date, split into dental and hygiene.

Recall on treatment completion shows a window to set a recall when any treatment form has been completed.

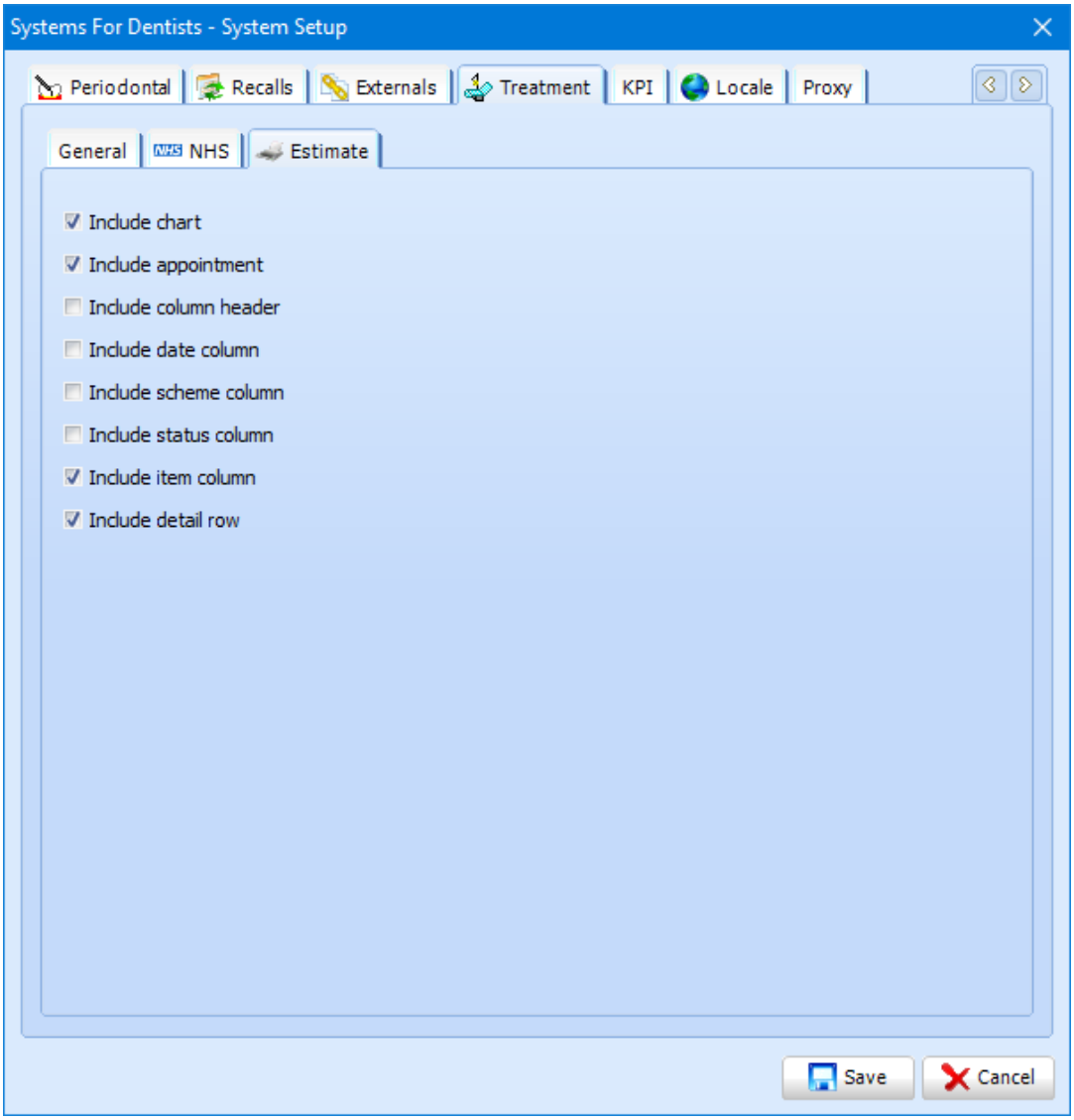
The **Externals** tab is to allow our support team to link SFD to your third party software. Please call support on **08456432727** to link this.



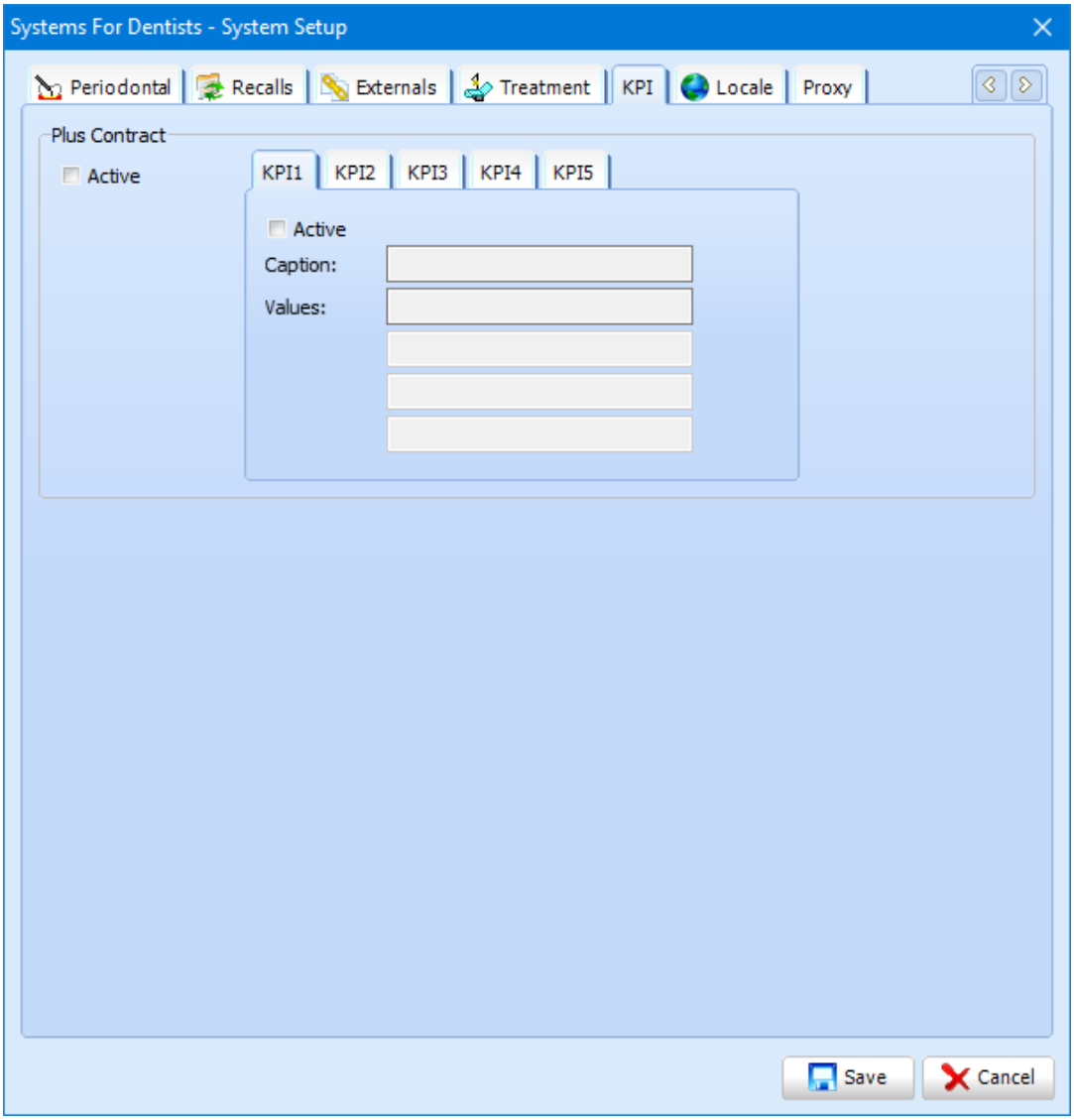
Within the **Treatments** tab, you are able to select various defaults such as the mode for charting,



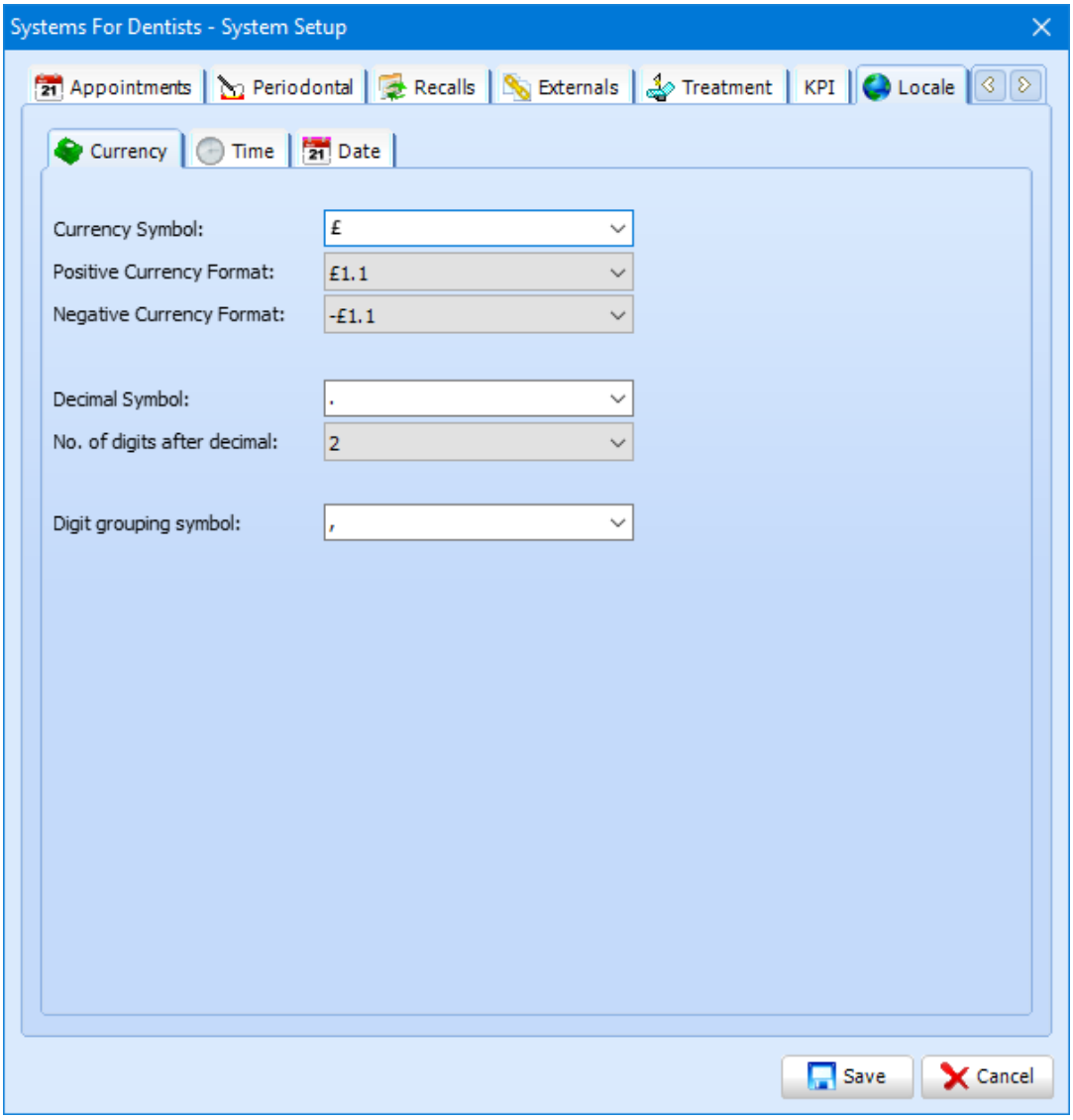
The **NHS** tab allows you to enable a declaration that each performer must agree to when transmitting a treatment form. The text can be modified from the default.



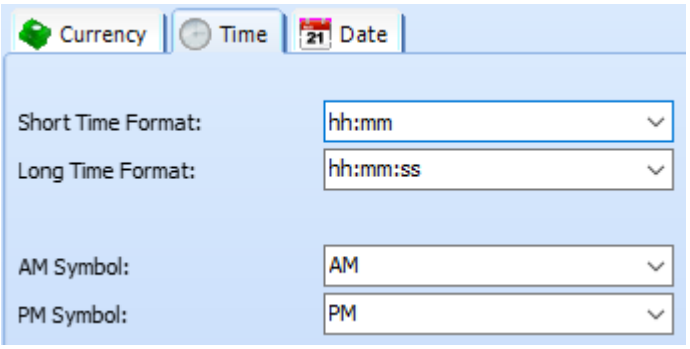
Within the **Estimate** tab, you are able to select what information you do and do not wish to see when generating an estimate.

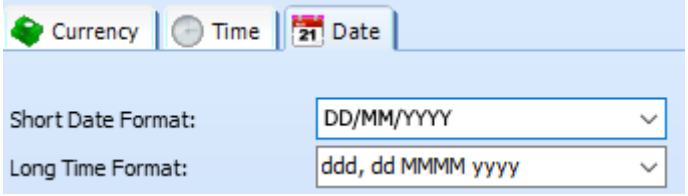


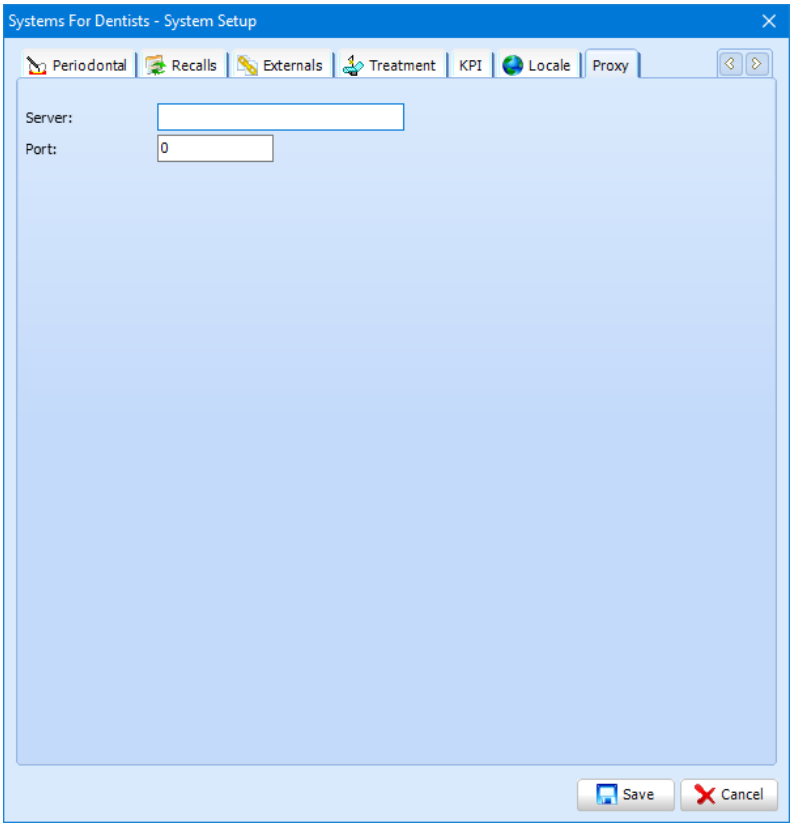
Information on the **KPI** tab is coming soon.



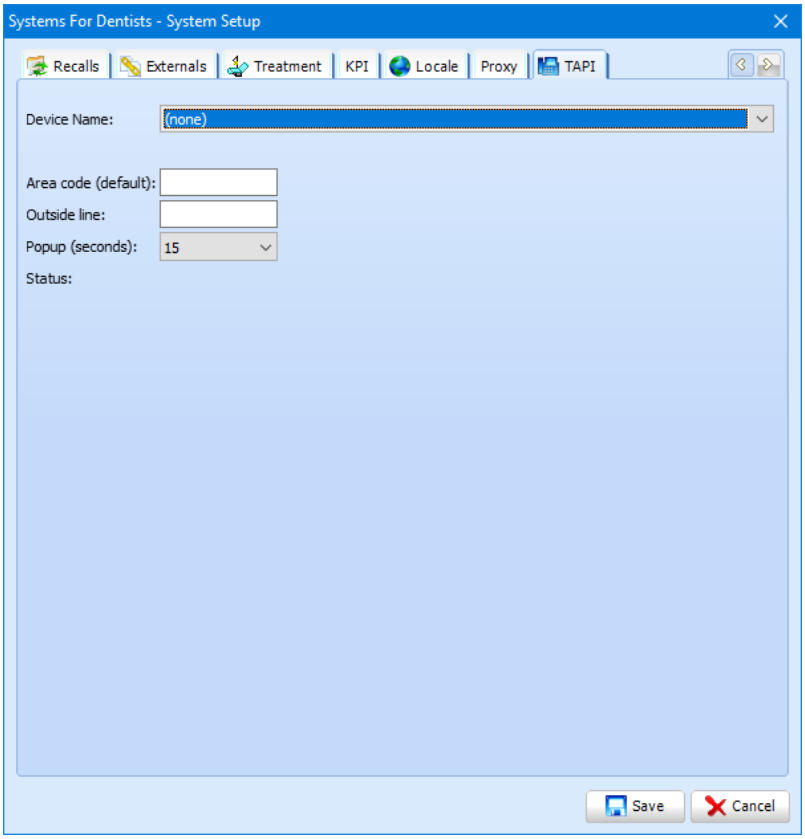
Within the **Locale** tab, you can set the default formats for the **Currency**, **Time** and **Date** within the corresponding sub tabs.







If your practice uses a proxy server, details can be entered here to allow SFD to use this.

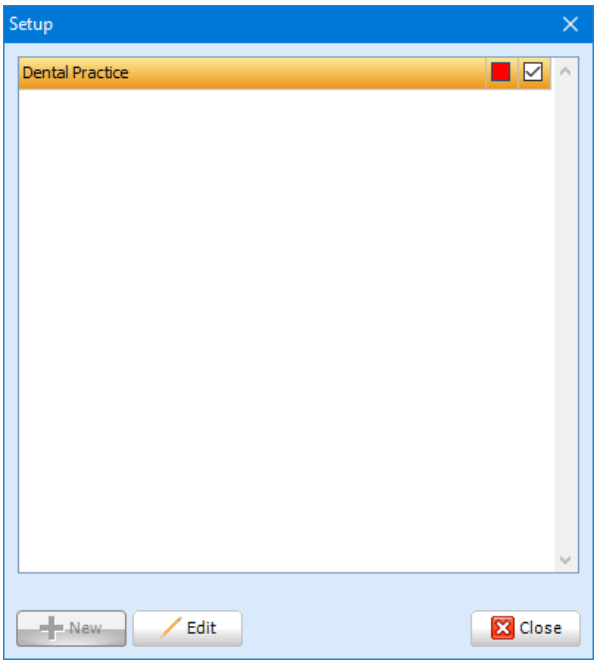


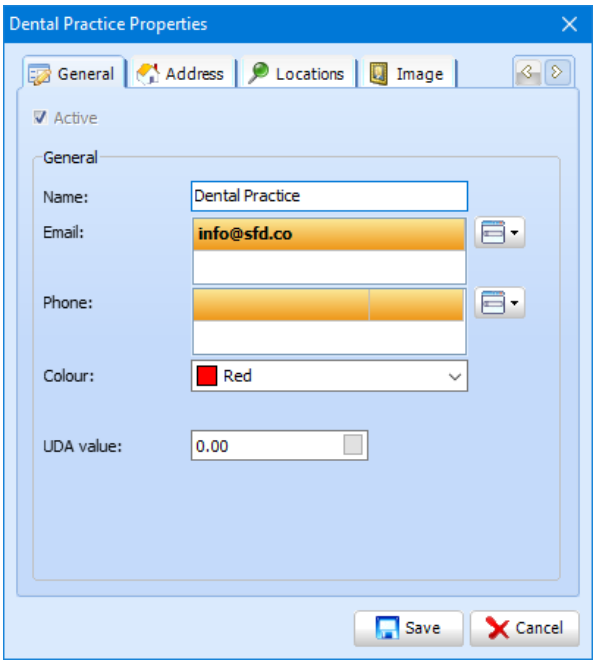
If your practice uses our TAPI integration, this can be setup here. Call support on **0845 643 2727** for assistance.

Practice

Practice setup allows you to change practice details, which will influence certain aspects of the program, such as merge fields and the gingerbread men.
To access the practice setup, click on the **Tooth icon** in the top left hand corner and select **Setup**. Click on the **Practice** button, which is located under the **System** bar.

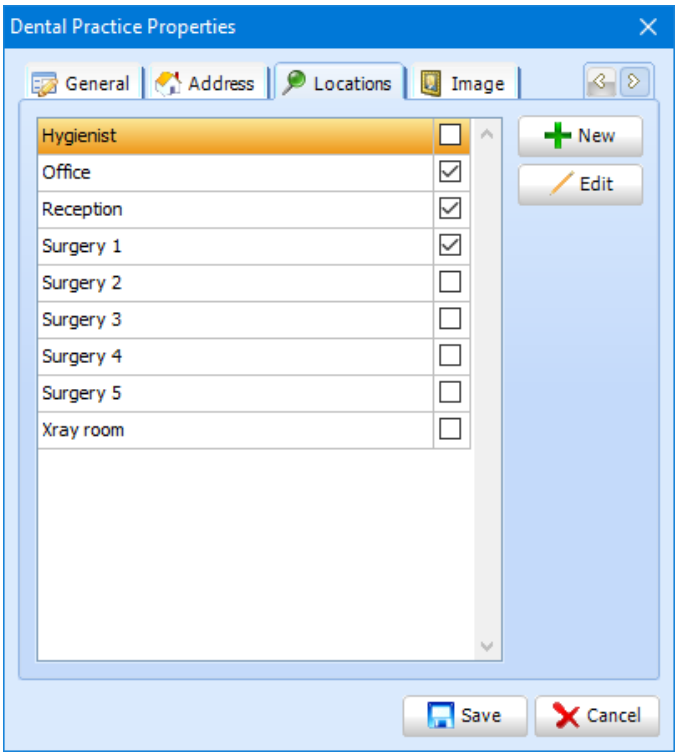
To edit any existing practice details, highlight the practice then click **Edit**.





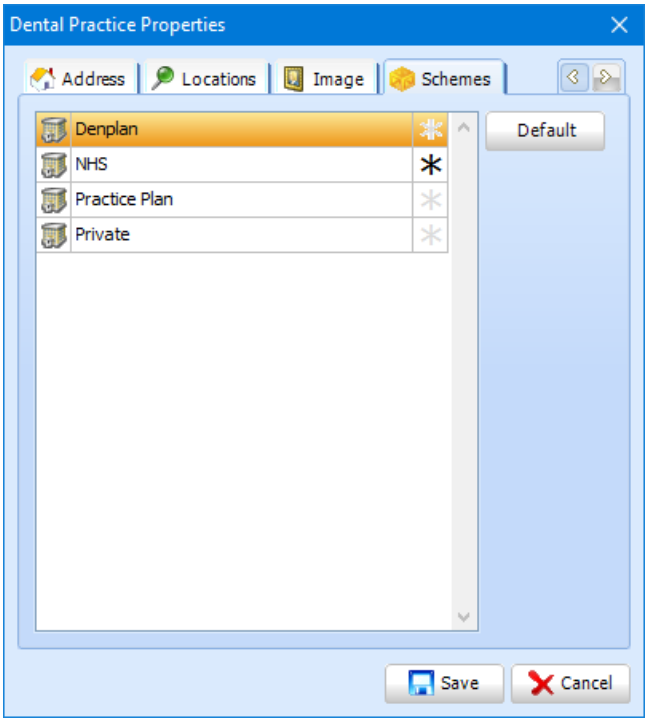
Set the practice **name**, **email** and **phone**. These details will then populate on correspondence generated. Add the practice address under the **Address** tab.

The next part of the setup is within the **Locations** tab. You can edit the list of computer locations here.



Within the **Image** tab, upload the practice logo.

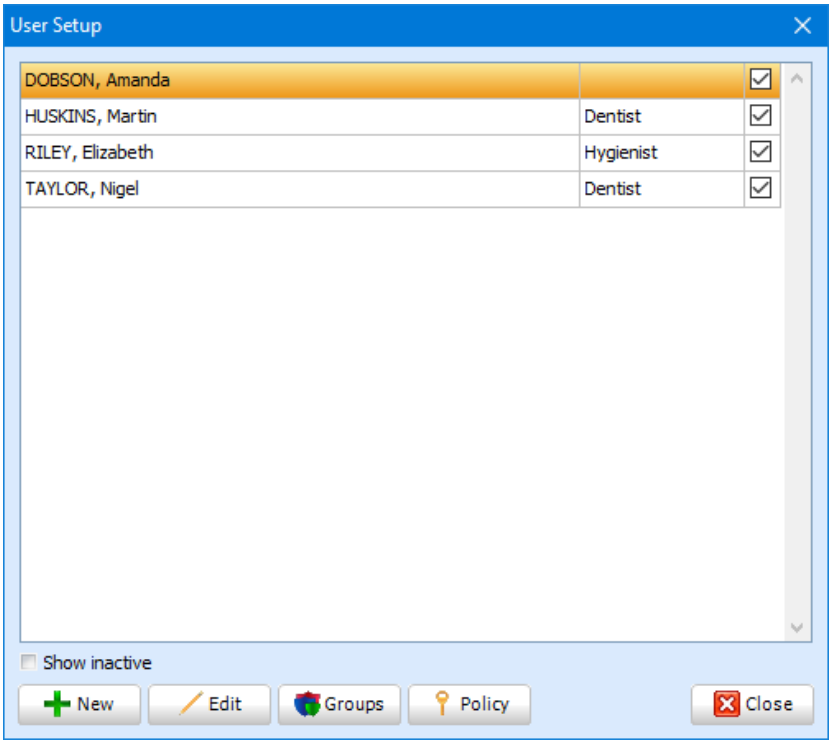
Under **Schemes**, you can select the default scheme.



User Setup

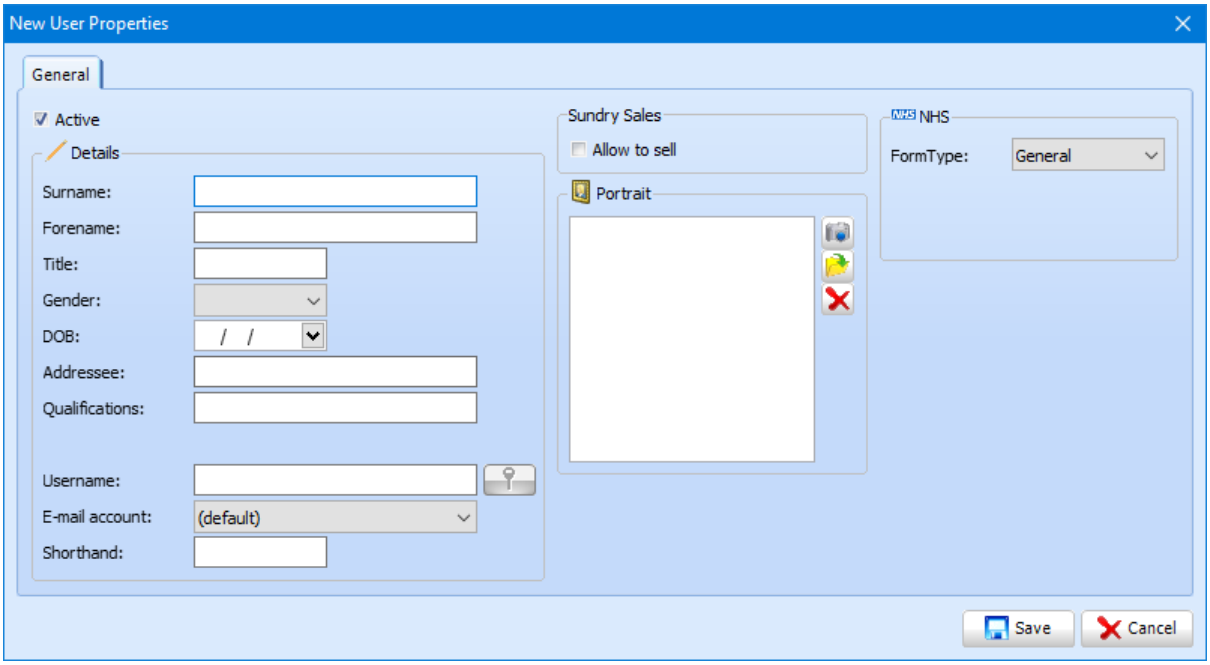
To access user setup, click on the **Tooth icon at the top left** and select setup. From there click on the **Users** button, which is located under the **System** bar.

The **User Setup** window will now be displayed. This will list all the active users.



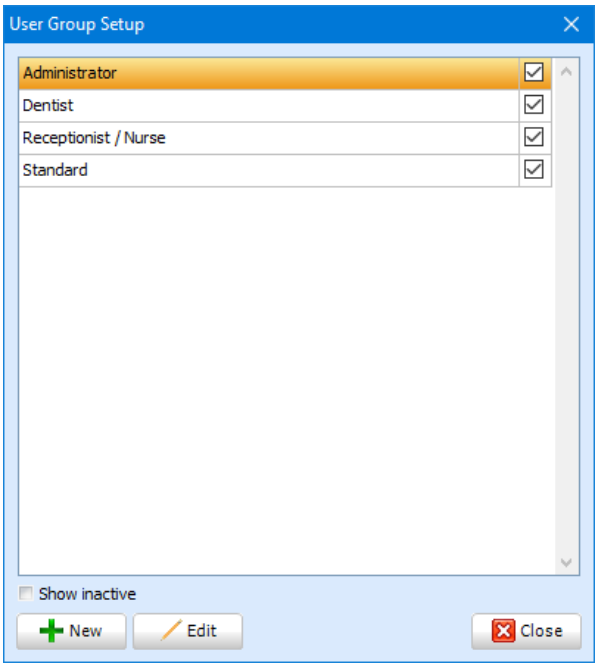
Click the **New** button to create a user or select the user you want to edit and click **Edit** button**.**
When creating a new user you will be asked for their User Provider Role first. Click on the dropdown list and choose a role for your new user.

The **New User Properties** window will now appear.

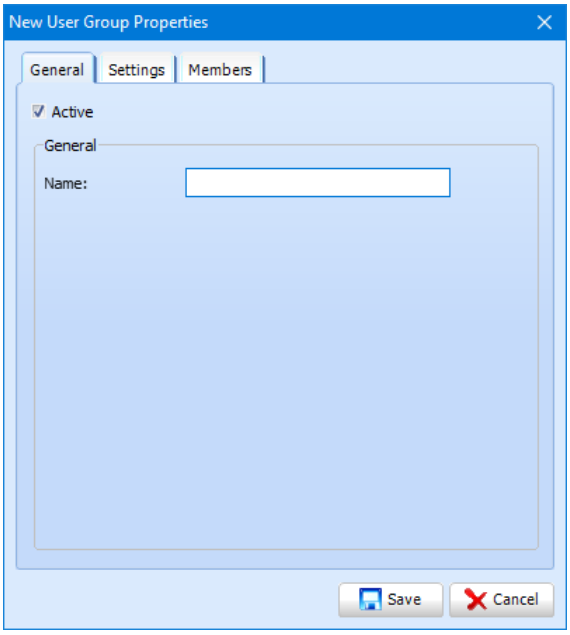


Enter the user's **Surname**, **Forename** and set a **Username** at minimum.

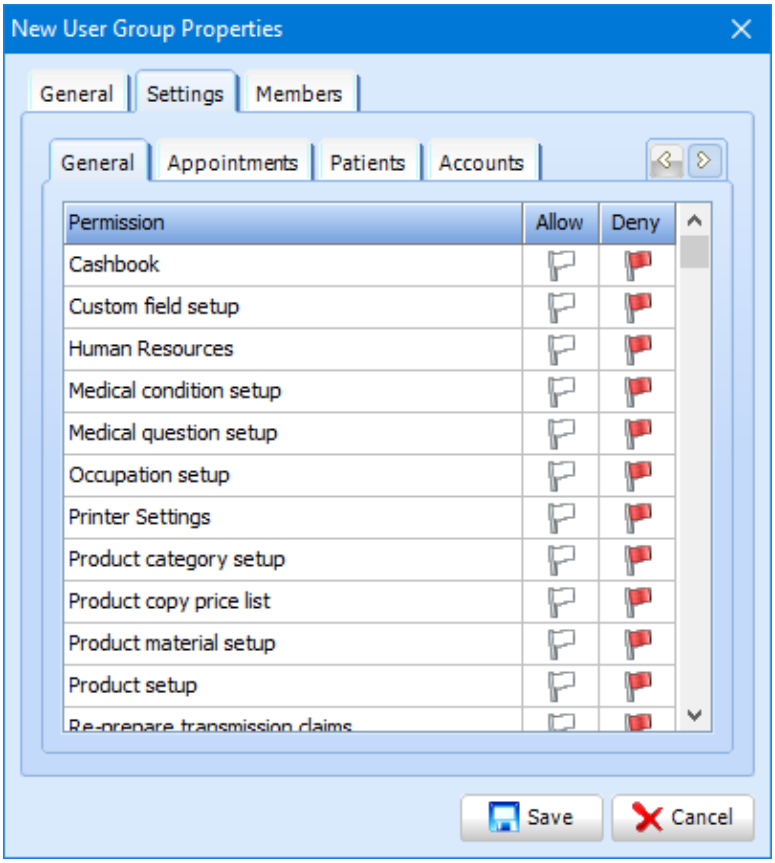
Before the user is able to login they first will needed to be added to a security group.
Security groups are an imperative element within any modern business critical application, and dental software is certainly no exception, SFD has made the management of permissions simple by ensuring centralised groupings rather than forcing the practice to manually assign permissions per user. To enter the **User Group Setup**, click **Save** which will return you to the **User Setup** window. Now click on the **Groups** button.



To edit a group, click it and then **Edit**. To create a new group click on the **New** button, both options will bring up the same window. The first tab is the **General** tab. Type in the name of the group you would like to create.

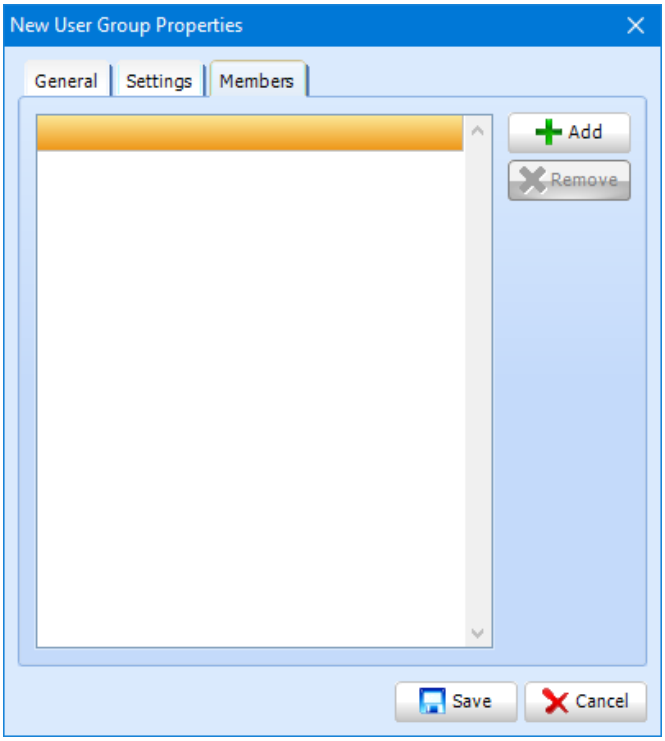


The next step is to define the actual permissions, click on the **Settings** tab. All permissions default to deny. To change this, click the white flag to change this to **Allow**.



There are multiple tabs across the top which contain additional permissions.

To add a member to a security group**,** Click on the **Members** tab followed by the **Add** button.

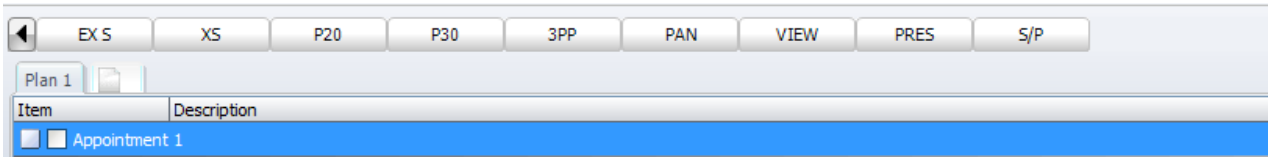


Select the member of staff from your list of displayed users and click on the **OK** button, this will return you to the previous screen, with the addition of your newly added member of staff.

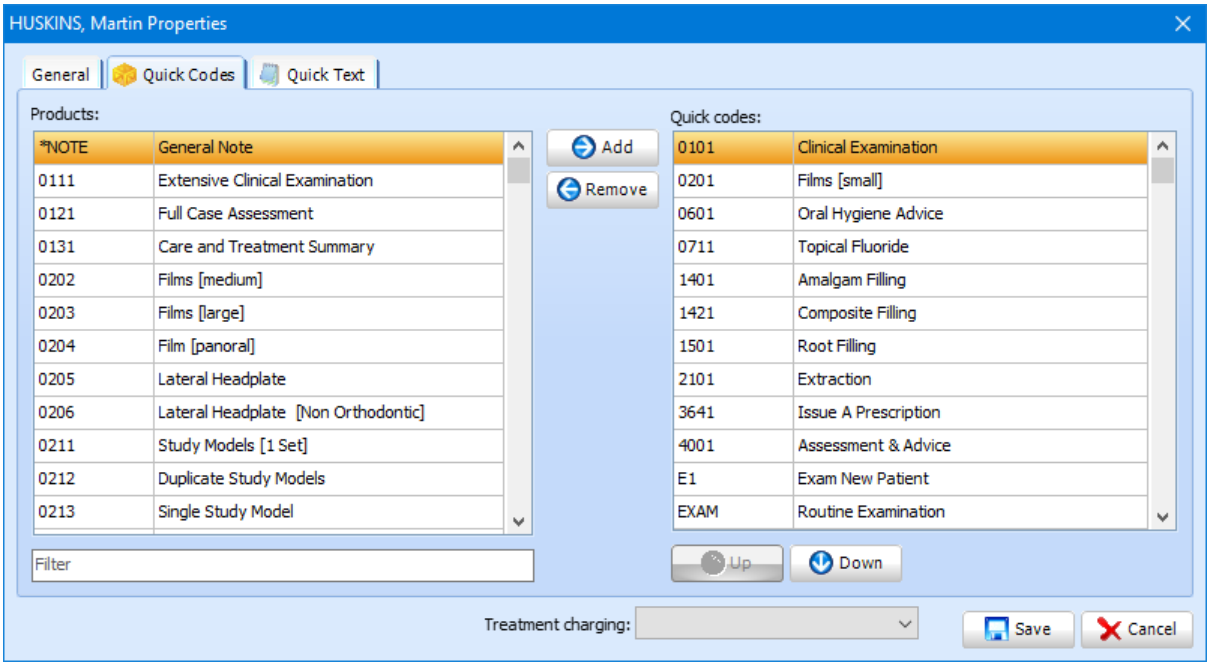
Click **Save** to save your changes.

Quick Codes

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.

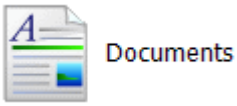


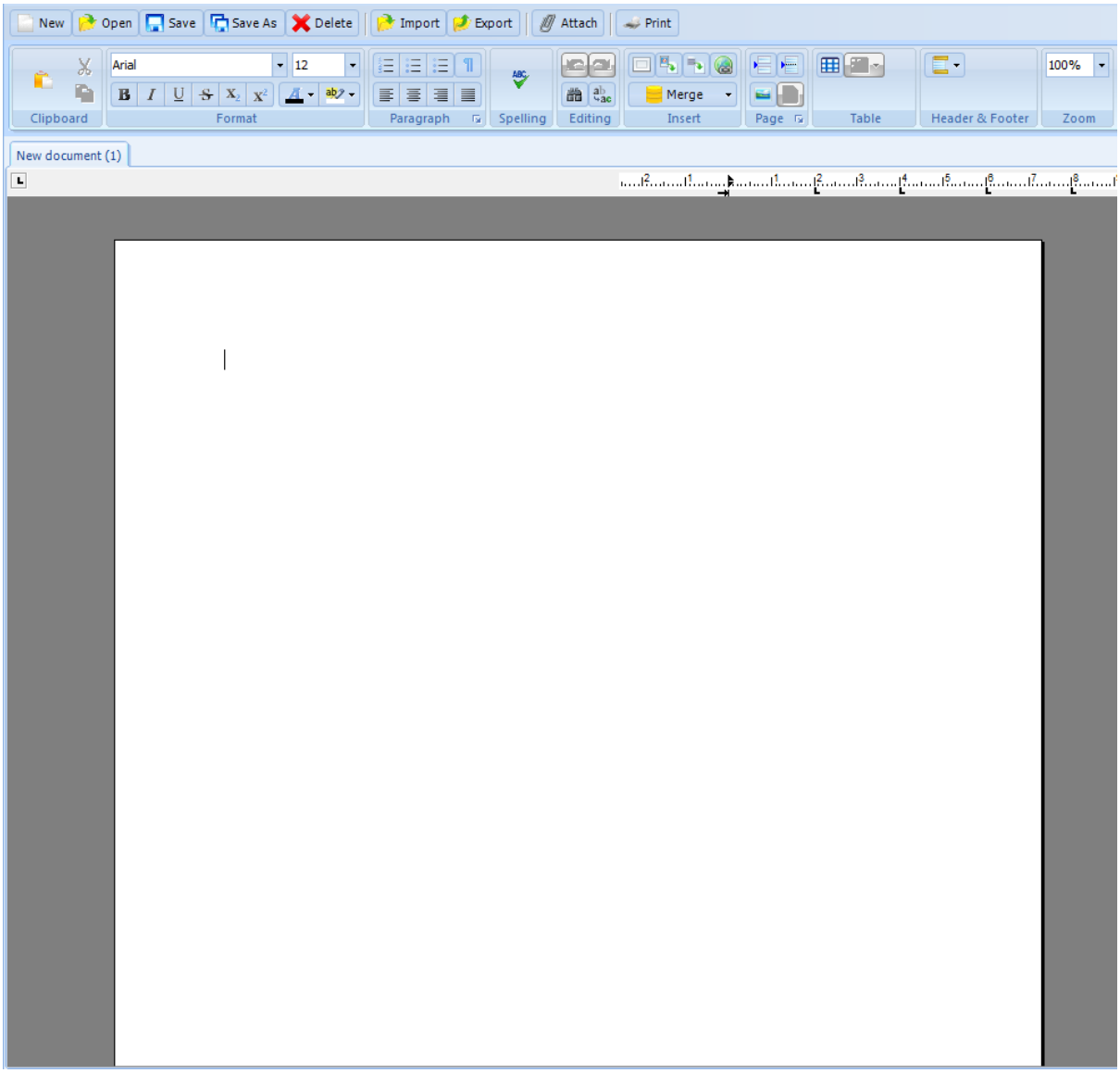
The List on the left hand side shows all the available codes you can add to the user. The right hand screen shows all the quick codes the users currently have. To add a quick code, find the code on the left then click on the **Add** button. This will then move that code to the right hand side. You can 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.

Documents

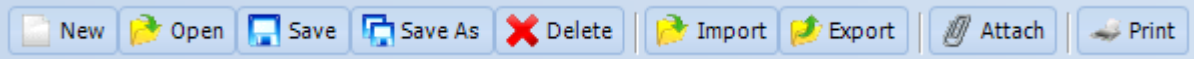
Documents

Document setup allows you to edit and create letter and email templates within your system. This is a built in word processor within SFD v6. To access this particular part of the setup, click on the **Documents** button.





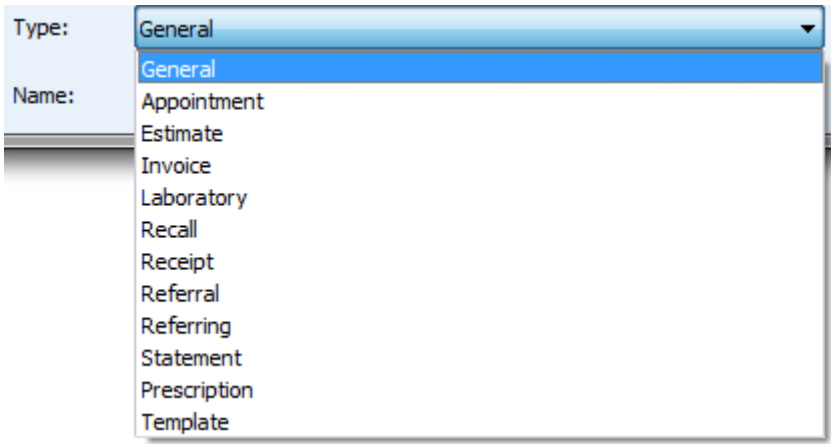
Buttons



New allows you to create a new document.

Open allows you to open any existing documents.

Search for the document you wish to open within your dental software. Remember that you have different type of documents within the program. Use the dropdown to search for a document saved within a specific type.



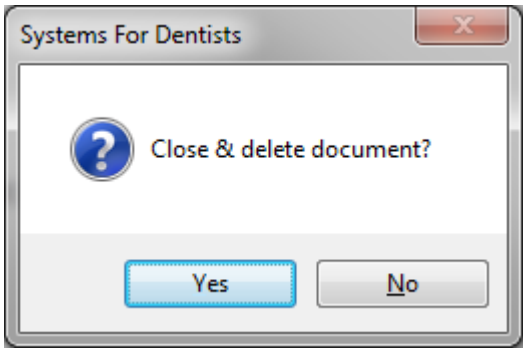
Click on the document then click the **OK** button to open.

The **Save** button allows you to save any changes that you have made to a document.

Saves As functions similarly as save but allows you to choose the location you are saving the document to. After clicking the **Save As** button you will be presented with the **Save Template** window.

Select the location you wish to save the document and then type the name of the document in the text box next to **Name**. Click **OK** to save the document.

The **Delete** button removes the document that you have open from the system. After clicking **Delete** the following dialogue box appears.



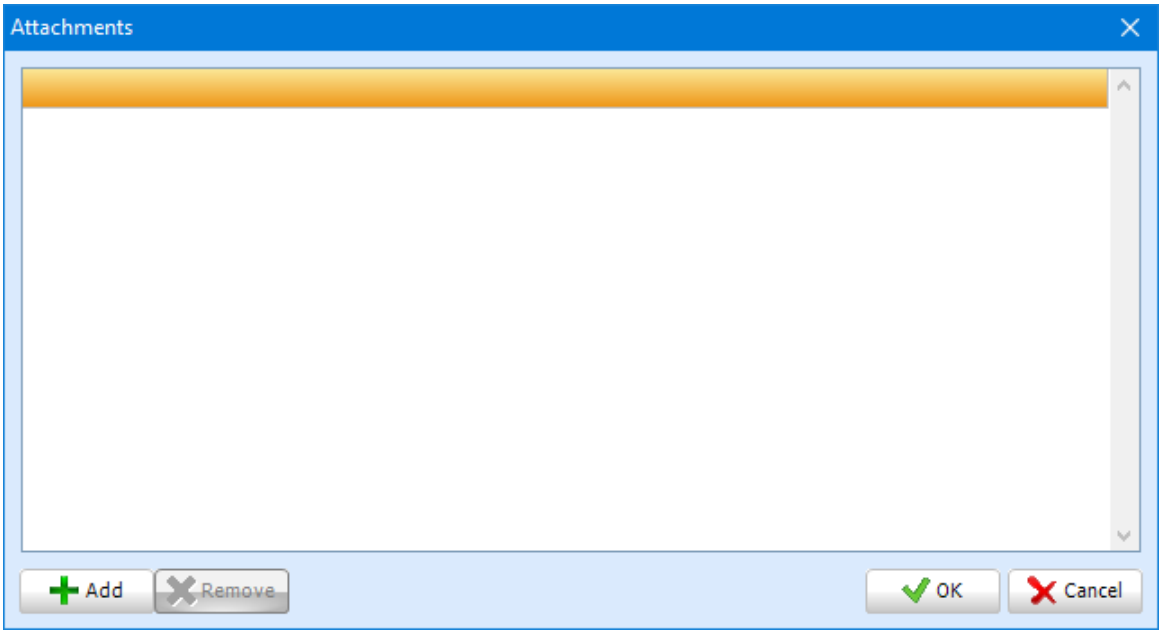
Click the **Yes** button to confirm the deletion of the document.

Import allows you to add documents to SFD v6 from an external source. After clicking on the **import** button the following window appears.

Navigate to the document you wish to add, and then click **Open** in the bottom right hand side of the window to add the document to SFD.

Export allows you to export a document you have created within SFD to an external location. After clicking **Export**, browse to the location you wish to save your document to, enter the file name then click **Save**.

The next button is **Attach**. This allows you to attach items to a document. To attach an item to a document, first of all open the document you wish to add an attachment to. Then click on the **Attach** button. The following window will then appear.



Click the **Add** button in the bottom left hand corner to add an attachment. Browse to the item you wish to add as an attachment, and then click the **Open** button to add. The document you added will now be shown in the **Attachments** window. You can add multiple attachments to each document. You can also remove any that have been added in error by clicking on the **Remove** button.

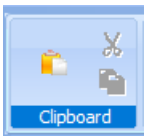
Click the **OK** button once you have added all attachments desired.

The final button at the top of the screen is **Print**, as you would expect this allows you to print which ever document you have open within the word processor.

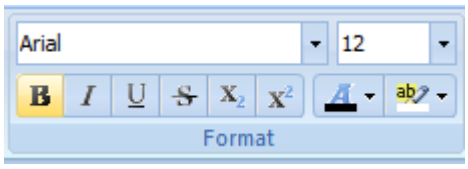
Ribbon

The next thing we are going to cover is the word processor's ribbon. This contains all the tools for formatting documents within the dental software integrated word processor.

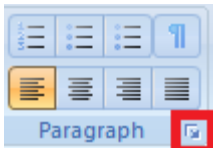
The first section of the ribbon is the **Clipboard**. This includes copy, cut and paste. This is useful if you need to repeat a certain piece of text within your document.



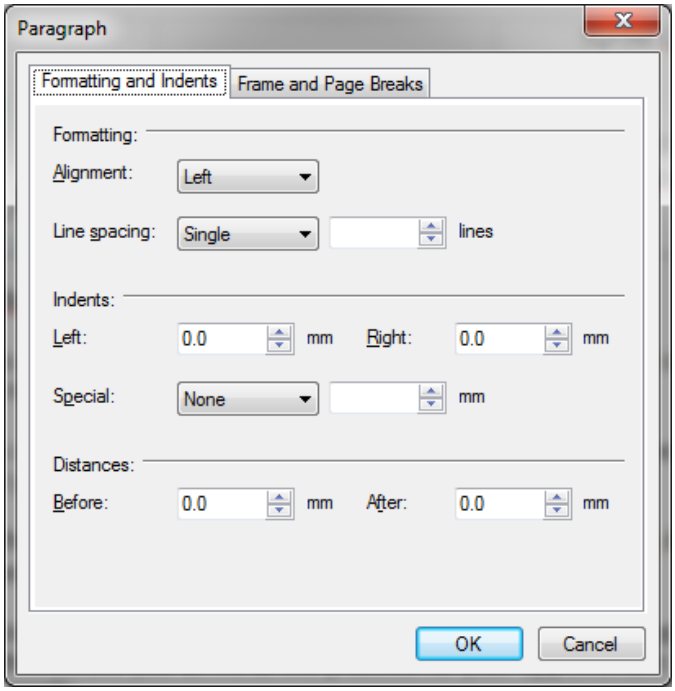
The next section is **Format**. This allows you to format the text within your document. You have options such as bold, italics, underline and strikethrough. You also have the ability to subscript and superscript. From this section you can also select your font and font size, font colour and highlight colour.



Paragraph is the next section. This section has the features such as bullet point options and paragraph alignment.

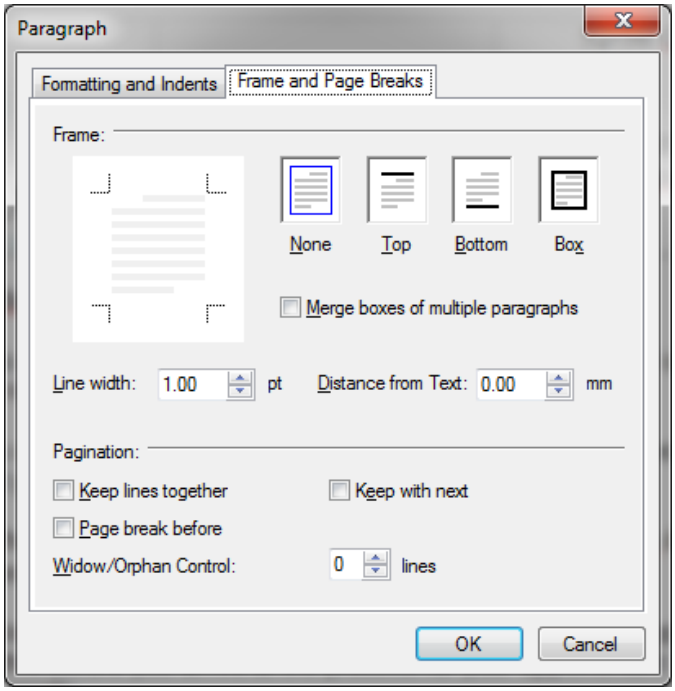


To view advanced paragraph settings click in the icon within the red square within the diagram above. The advanced paragraph window is displayed below.



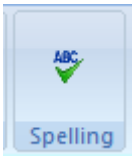
From the **Formatting and Indents** tab you can set values for line spacing, indents and distances before and after paragraphs.

The second tab is **Frame and Page Breaks**.

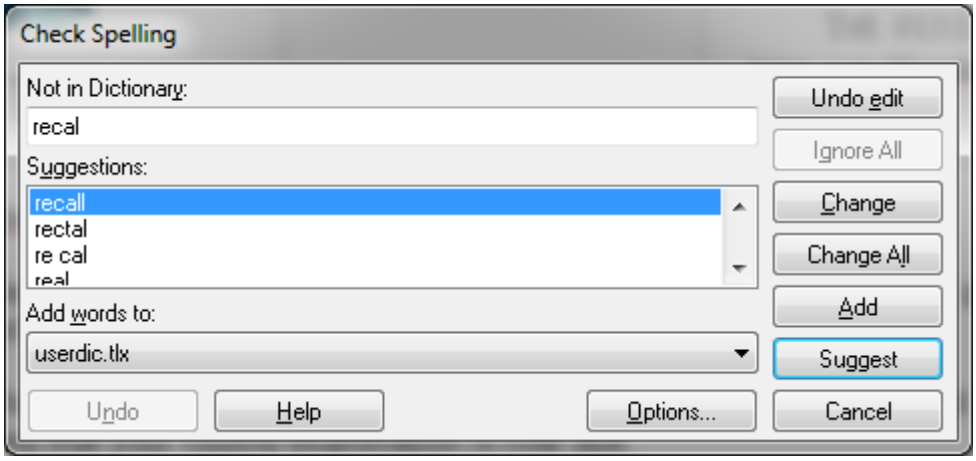


This tab allows you to select frame and page break properties and values.

Spelling is the next section in the tools ribbon. Click on the spelling button shown.

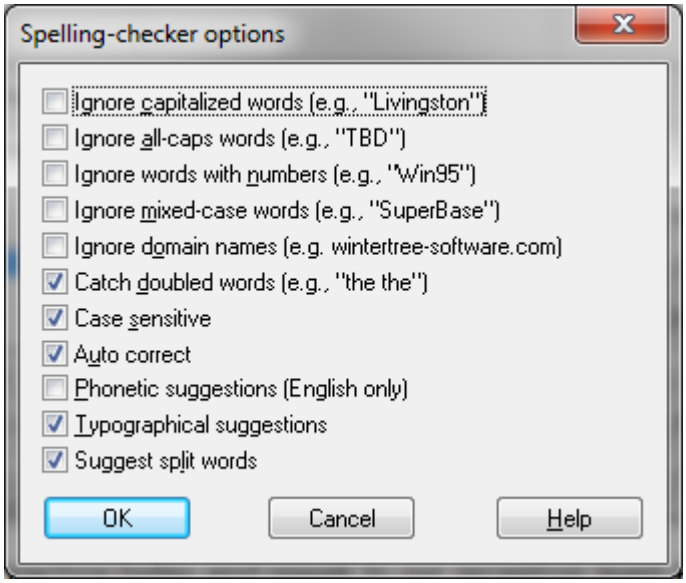


The **Check Spelling** window will then appear.

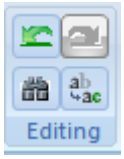


This widow will pick up words that are not in the dictionary. A list of suggestions will be shown below, click the correct suggestion then click **Change**, or **Change All** to correct spelling if you have misspelt more than once.

You also have spell checker options. Click the **Options** button to view.

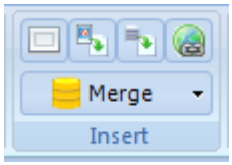


Editing is another section that features on the ribbon.

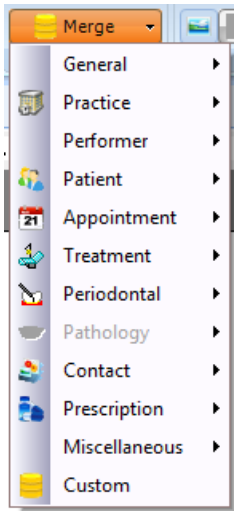


This section has **Redo** and **Undo** buttons. You also have Find Text, and Replace text.

The next section is **Insert.**

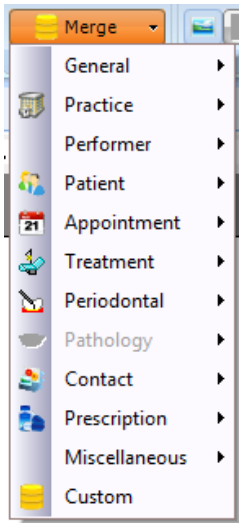


This includes options such as insert frame, insert picture, insert document and insert hyperlink. The main feature in this section is **Merge**. This feature enables you to personalise letters.



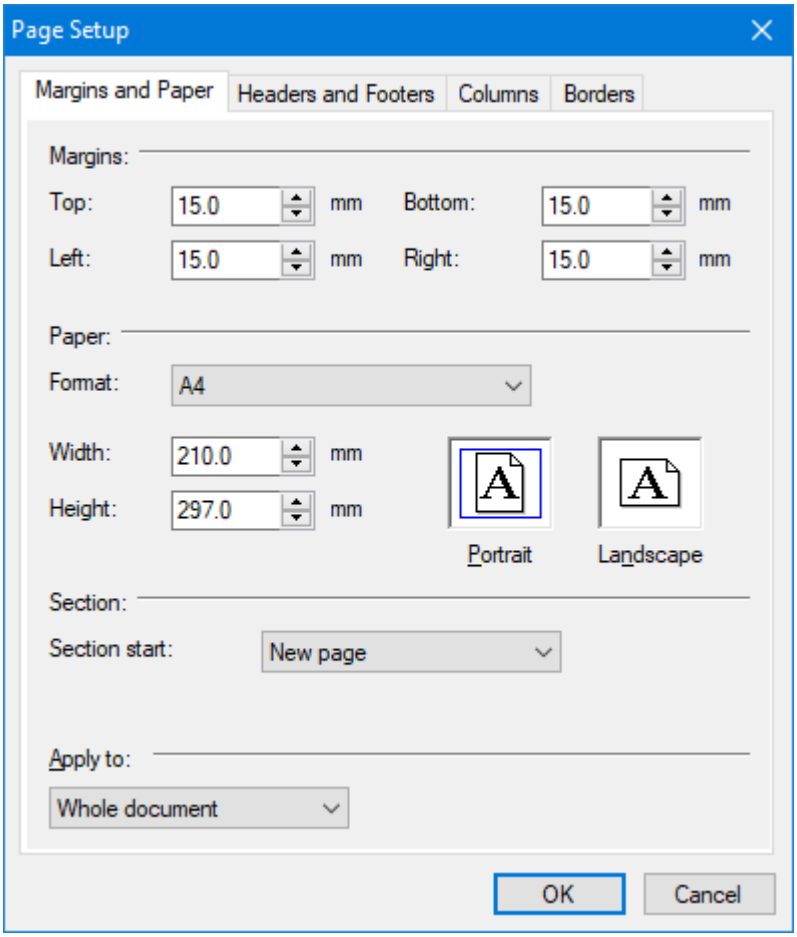
There are merge fields for items such as date, patient address, patient title, patient forename, and surname as well as their proposed treatment, their outstanding balance or referring dentist's details.

Anything that's within {Brackets} is a merge field and will be automatically generated for each patient. To add a merge field, click on the desired one from the **Merge** dropdown list.



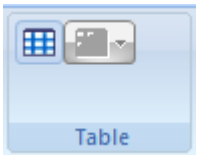
Page is the next section. This allows you to set page break, section break, set watercolour and set template.

By clicking on the section highlighted by the red square you can view **Page Setup**.

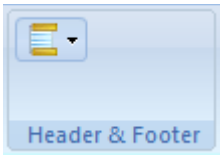


From this window you can edit properties such as margins, headers, footers and columns.

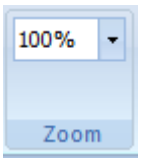
Table is another option available from the tools ribbon which allows you to create a table.



Next we have the **Header and Footer** section. This allows you to activate or de-active the header and footer of the document.



The last tool from the ribbon is **Zoom**.



Use the dropdown list to determine how far you wish to zoom in.

The final option is GDPR. To mark your document as GDPR compliant, select the GDPR icon. This will then illuminate.

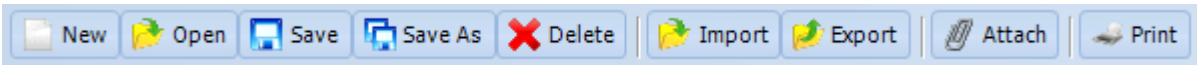
How to improve the format of a document sent as an email

One of the most popular features in your SFD dental software is the ability to send HTML E-mails to your patients, the technologies of word-processed documents and HTML are not entirely compatible, as such some small alterations are required to get the best results from this feature.

Our support team are available to assist with the creation of document templates.

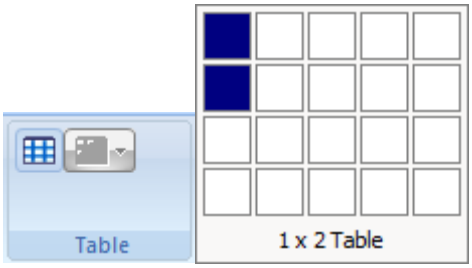
As an example we are going to take a sample extraction letter with a header and footer and convert this into an email format.

Now click on the **Open** button from the tool bar and select the document you wish to create a copy of.



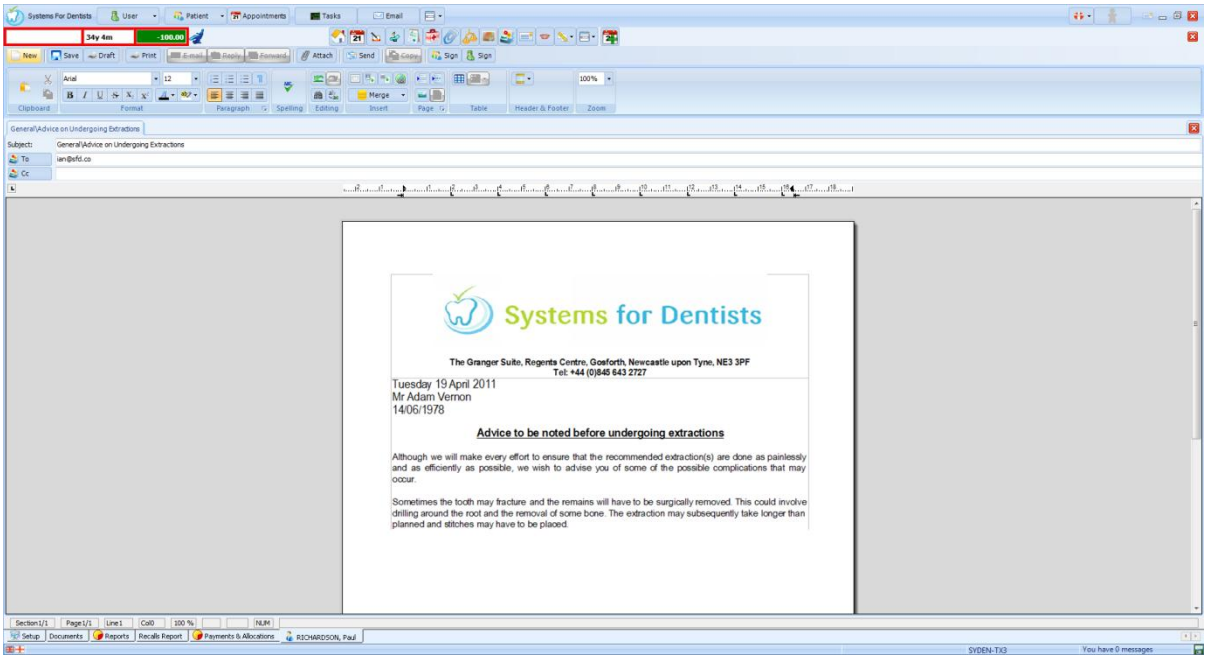
Having opened the document you should now **Save As** giving it a new name, I would suggest that you add the word **Email** to the end of the title.

Now click on the Table panel and create a new table, in this example we will create a table with one column and two rows.



You will now see that there is a table in the document, which can have information pasted into it. Double click on the header and select all of the text / images then click on **Copy**.

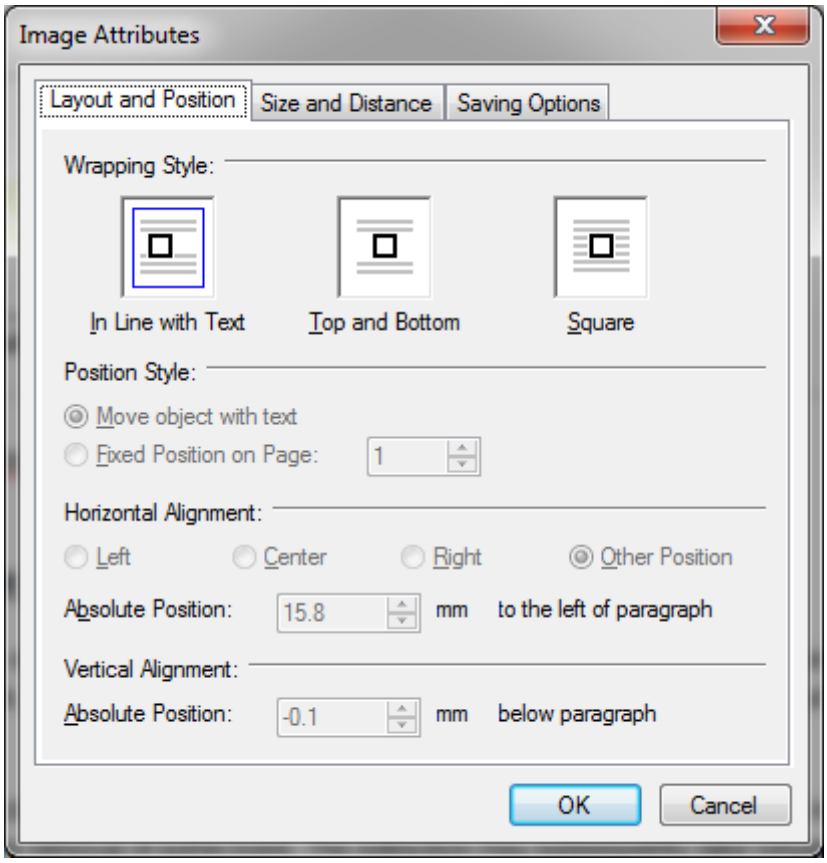
Now select all the rest of the text from the document, click on **Copy** and **Paste** it into the bottom cell of the table.



Once you have completed the steps above, remove any unwanted text / images from the document then click **Save**.

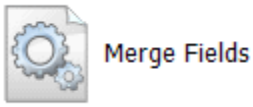
You now have a letter that is compatible with HTML format. You should ensure that the template sends correctly as an email by sending a test to yourself within a test patient record.

Sometimes you may find there are additional spaces in the document between images and text, to ensure this is removed double click on the image and change the "wrapping style" is set to "in line with text" and click the **OK** button.

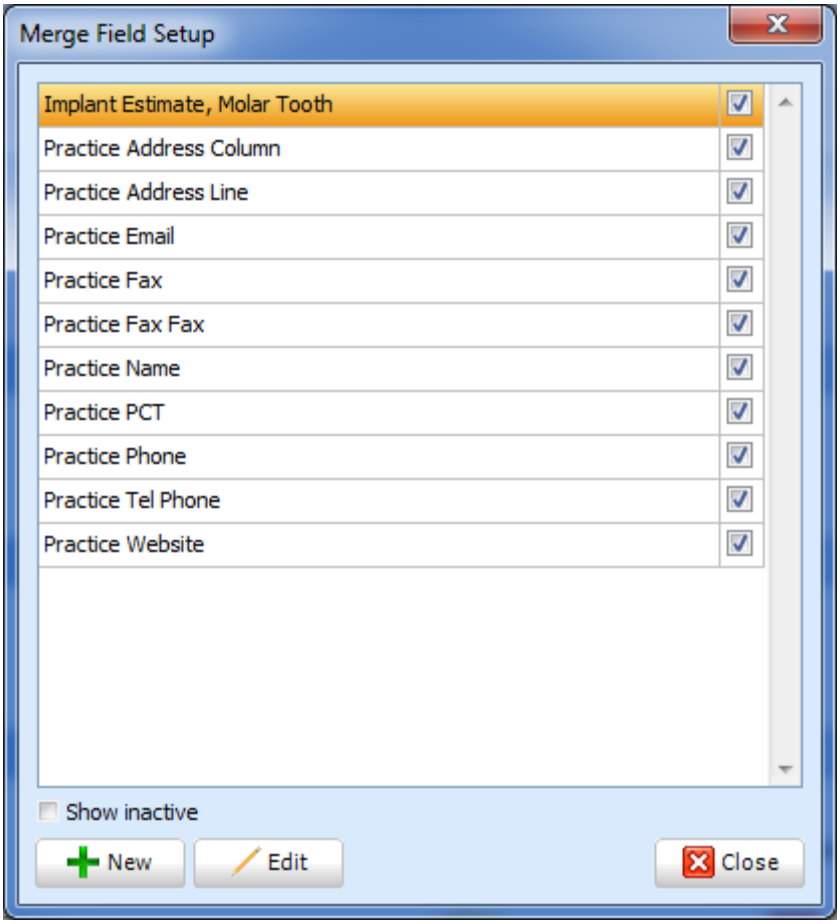


Custom Merge Fields

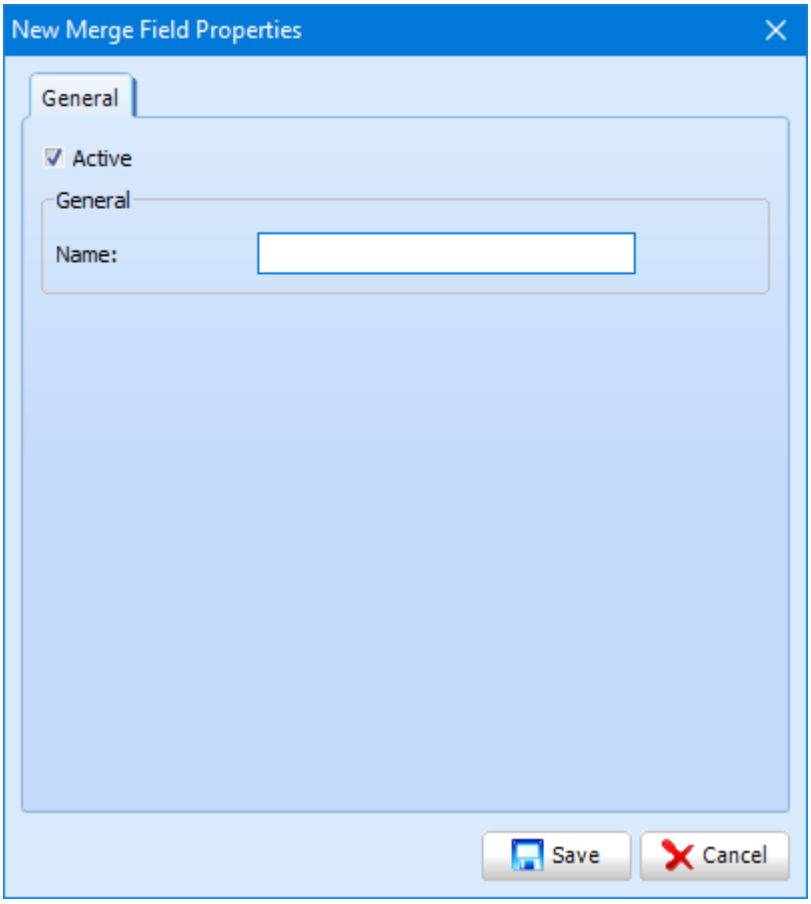
To access the practice setup, click on the **Tooth icon** in the top left hand corner and select **Setup**. Click on the **Merge Fields** button, which is located under the **Documents** bar.



This will bring up the **Merge Field Setup** window, shown below. Within this window you can see all your current custom merge fields which are active within the system. To show any inactive fields tick the show inactive checkbox to the bottom left of the window. To edit any existing merge fields, select the **Edit** button. To create a new merge field click on the **New** button.



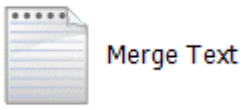
When creating a new merge field the **New Merge Field Properties** box appears. Enter the name of the merge field you wish to create within **Name** then click **Save**. The next step would be to enter information to put into the merge field you have created, refer to the **Merge Text** setup to see how this is done.



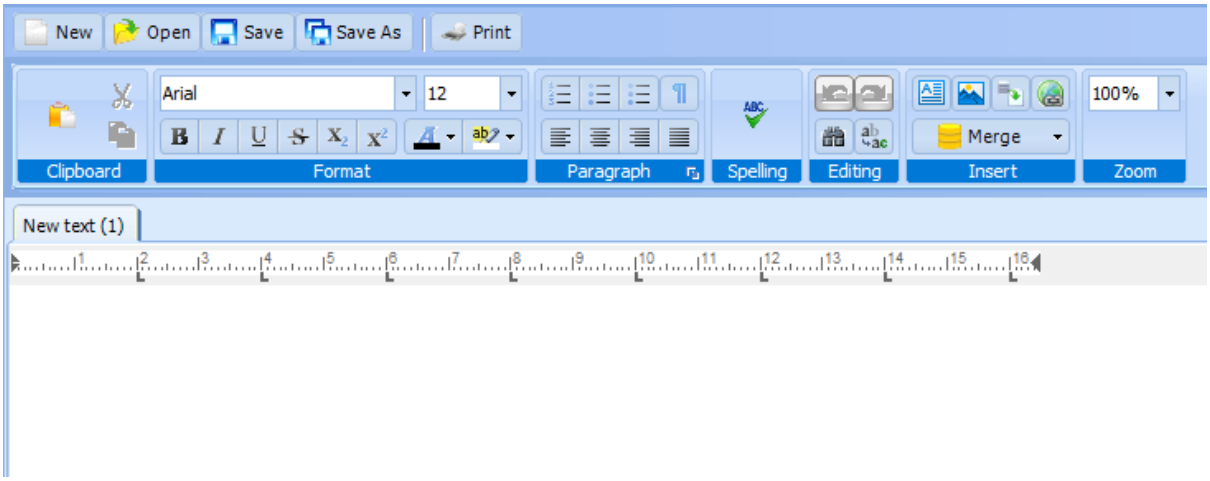
Merge Text

Merge Text allows you to create custom merge fields. These allow you to give the user a choice of text to enter on a document for example multiple performer names to add as a signature.

To access the Merge Text setup, click on the **Tooth icon** in the top left hand corner and select **Setup**. Click on the **Merge Text** button, which is located under the **Documents** bar.



The **Merge Text** screen will show.



New allows you to create a new Merge Text.

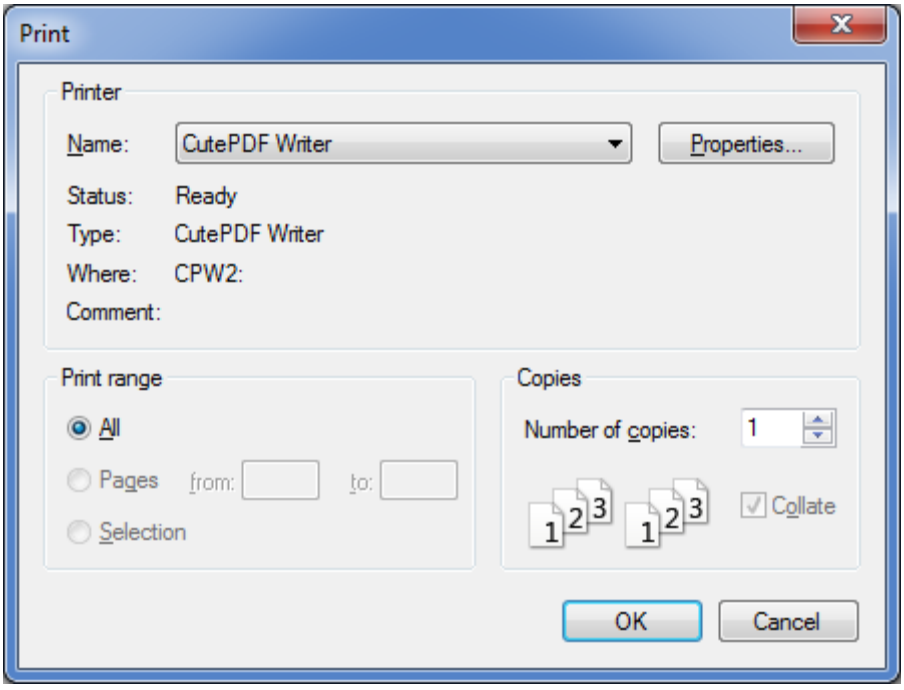
Open allows you to open any existing merge texts.

The **Save** button allows you to save any changes that you have made to a merge text.

Saves As performs similarly to **Save** but allows you to choose the location you are saving the document to. After clicking the **Save As** button you will be presented with the **Save Template** window.

Using the Merge dropdown button, select the merge field which you want to save the merge text into. The last step is to type in the name of what you want your merge text to be called. Click **OK** to save the merge text.

The next button along is the **Print** button. This will give you the facility to print out the current merge text you have open. Once you click the **Print** button the **Print** dialogue box appears. Click **OK** to print your merge text.

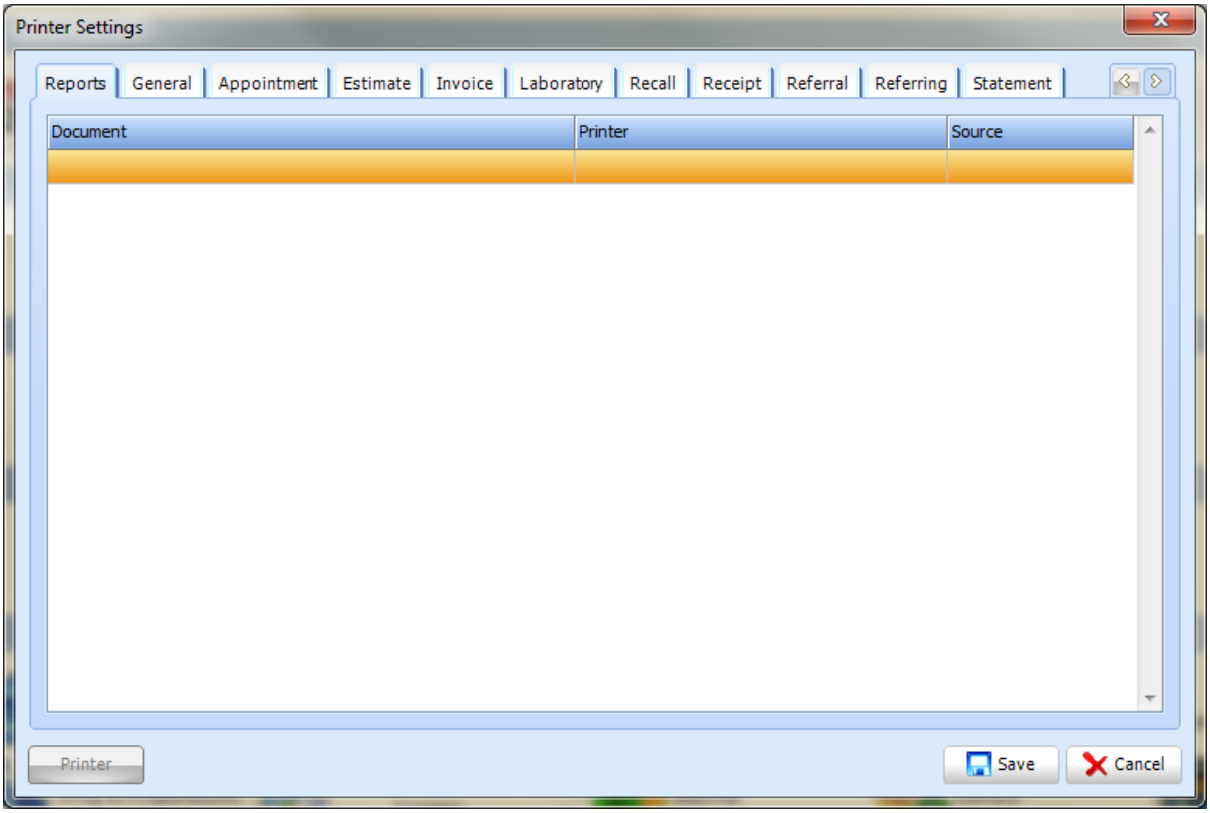


Printers

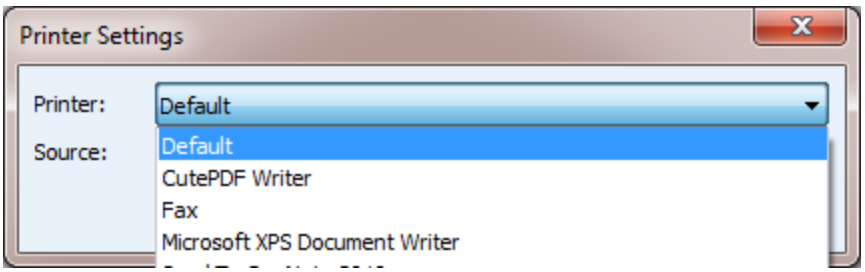
When you print a document it will automatically be sent to a default printer. You can change the printer your documents are sent to by taking the following steps.

To access the Printers setup, click on the **Tooth icon** in the top left hand corner of your screen and select **Setup**. Click on the **Printers** button, which will be located under the **Documents Bar.**

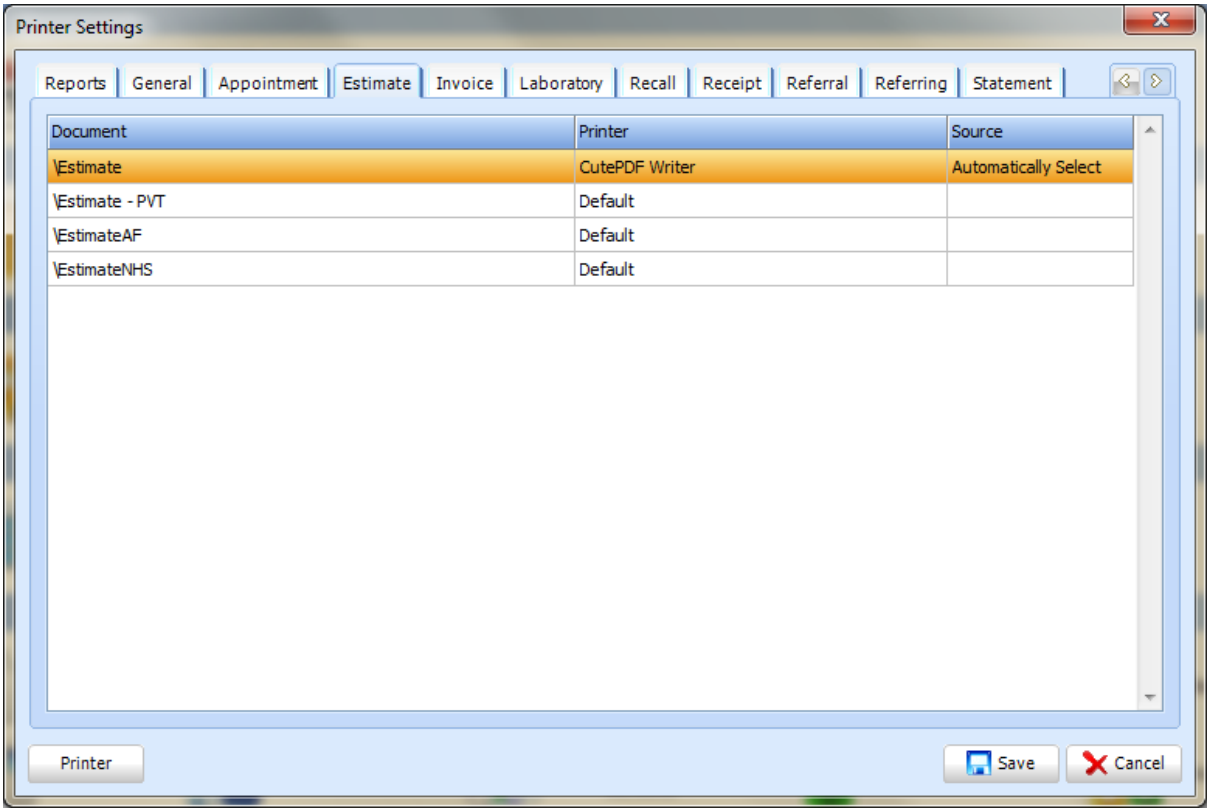
The **Printer Settings** window will open. Note that there are a number of tabs within this window. Under each tab there is a list of documents. Next to each document under the Printer heading it will say default.



To change the printer for a particular document, double click on the document. The **Printer Settings** window appears. Choose the printer you desire from the dropdown list.



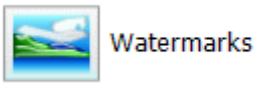
Once you have chosen the printer and clicked the **Save** button the printer you selected will be shown under the Printer heading next to the document.



The document will now automatically be sent to the chosen printer.

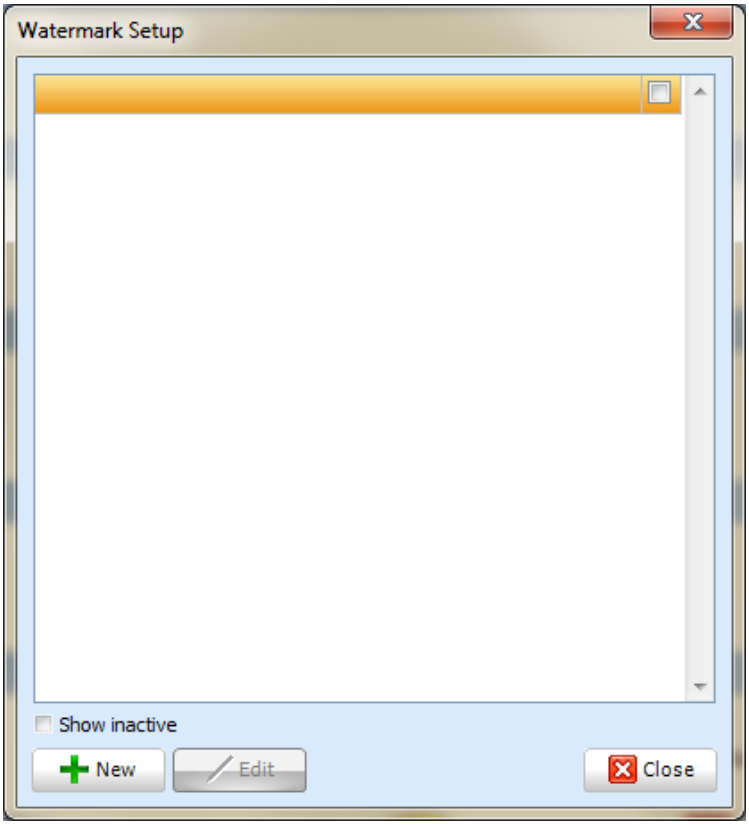
Watermarks

Within Systems for Dentists you have the ability to use watermarks within your documents via Merge Fields, this part of the setup allows you to add them into the system. To access the Watermarks setup, click on the **Tooth icon** in the top left hand corner of your screen and select **Setup**. Click on the **Watermarks** button which is located under the **Documents Bar.**

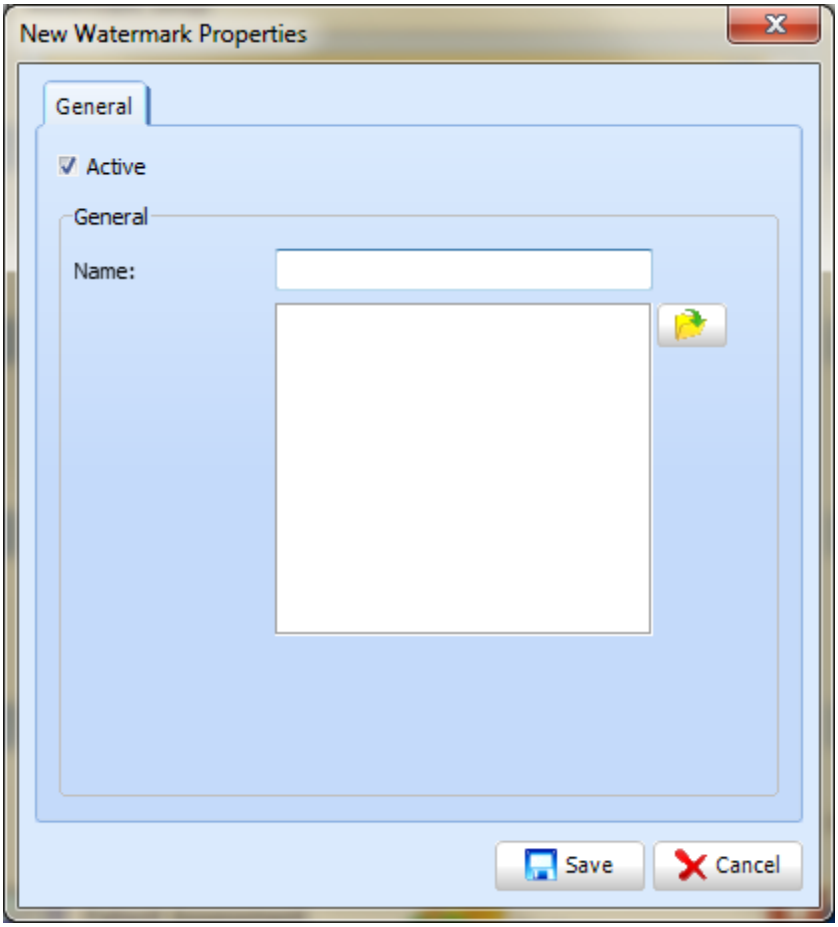


The **Watermark Setup** window will now appear showing you a list of currently active watermarks on the system. To see any inactive watermarks click on the show inactive checkbox to the bottom left hand side of the window.

To edit any existing watermarks, click on the **Edit** button. To add a new watermark, click on **New**.



The **New Watermark Properties** window appears. Next, enter the name of the watermark you would like to add then click the folder icon and locate your logo.



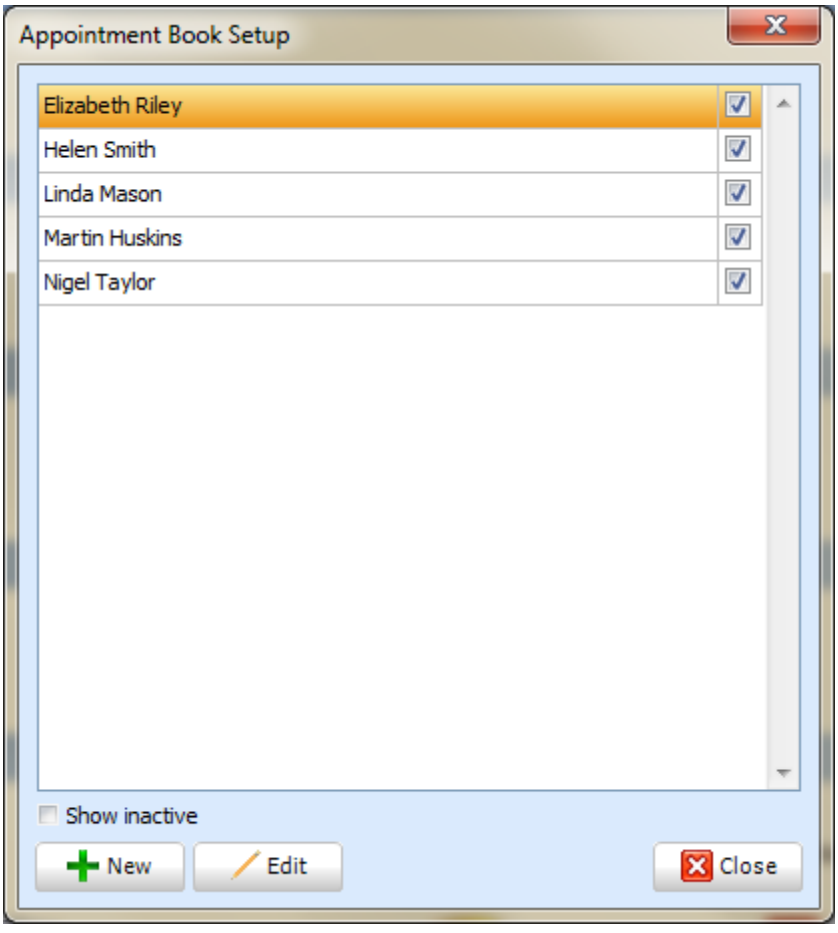
You will now be taken back to the previous window, and an image will now appear in the large white box underneath the name of the watermark. Click on the **Save** button once you have finished.

Appointment

Books

The SFD dental software allows you to personalise each of the dentists working hours within the book with their start/finish times and when they are off.
To access the book setup click on the **Tooth icon** at the top left hand corner of SFD and select **Setup**. From there click on the **Books** button which is located under the **Appointments Bar**.

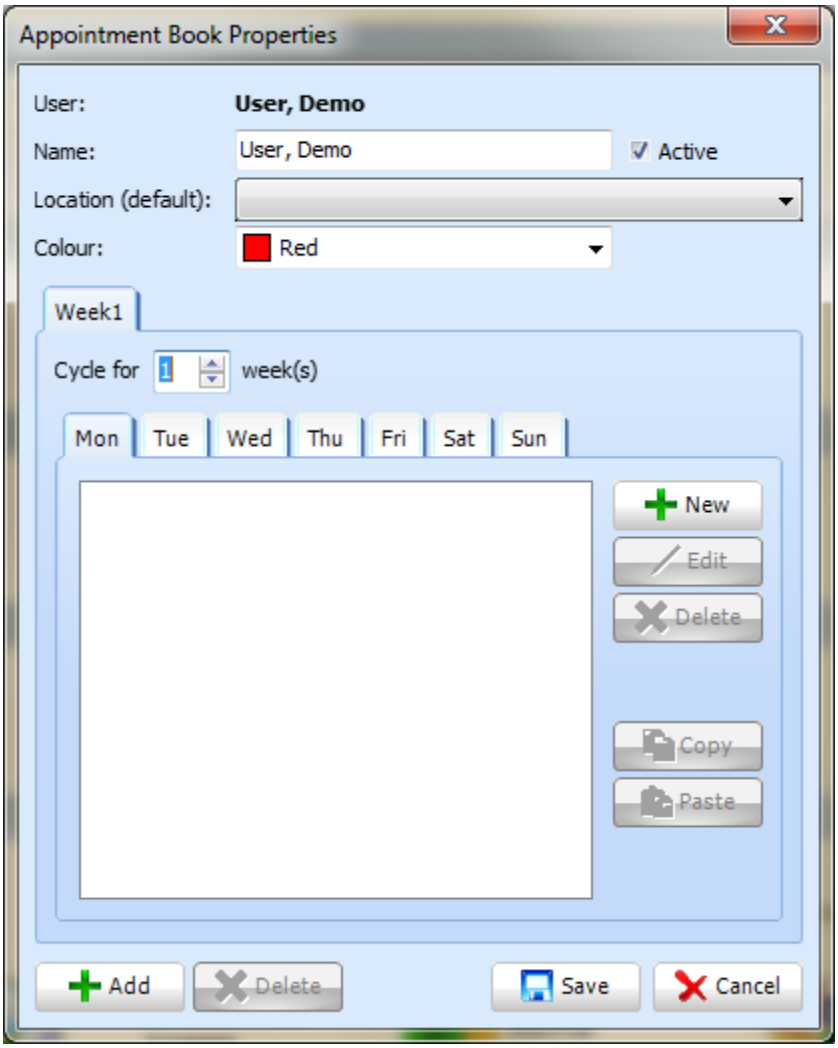
The Appointment Book Setup window will now appear. Within this window is a list of all the performers with an appointment book in the system. To see any inactive books, click on the **Show inactive** checkbox in the bottom left hand corner of the window.
To edit any existing book, highlight it then click on the **Edit** button. To create a new book, click on the **New** button.



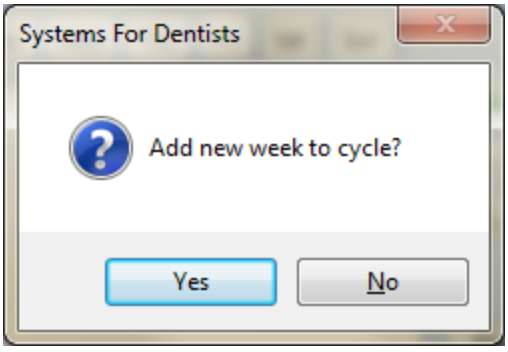
When creating a new Book, the next window which appears is the **User Select** window from this window click on the person you want to create a book for and click on the **OK** button.

The **Appointment Book Properties** window will now appear. Firstly, enter the name of the performer in the **Name** field then select the performer's working location. A colour can then be set below.

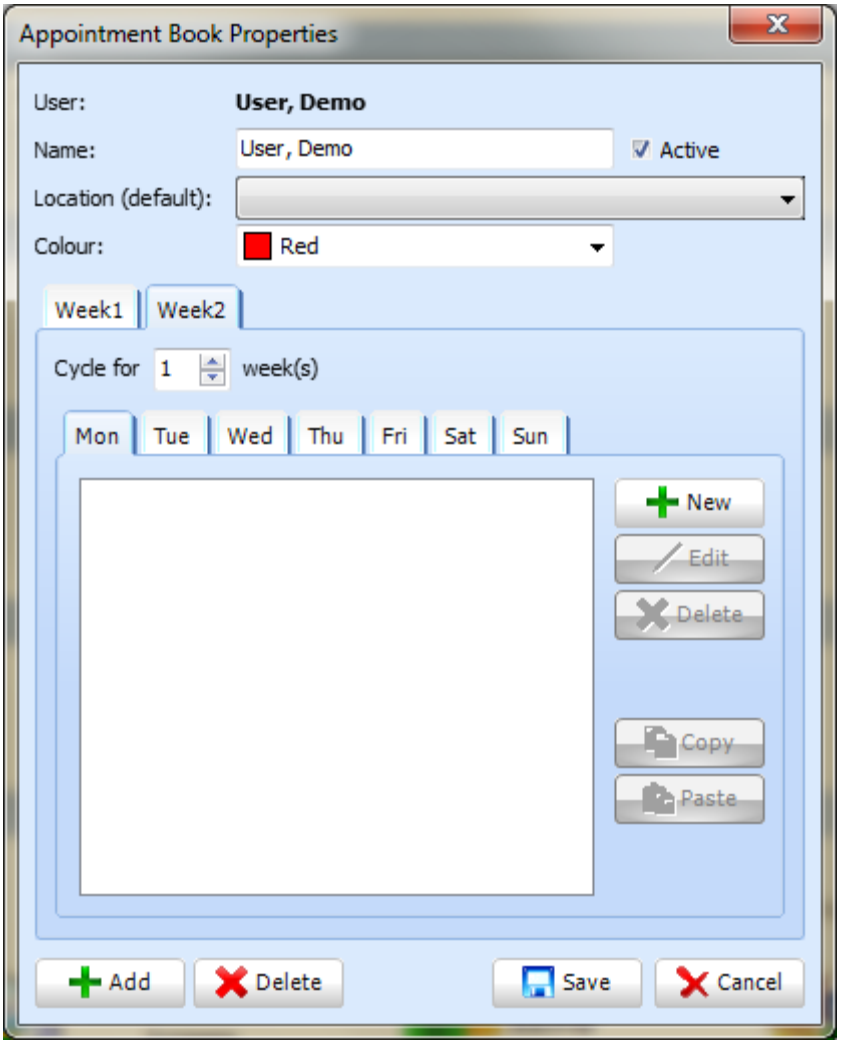
There is a tab named **Week 1**, this is the number of weeks in the rota currently, if you wish to add more than 1 week to the book, click on the **Add** button in the bottom left hand side of the window.



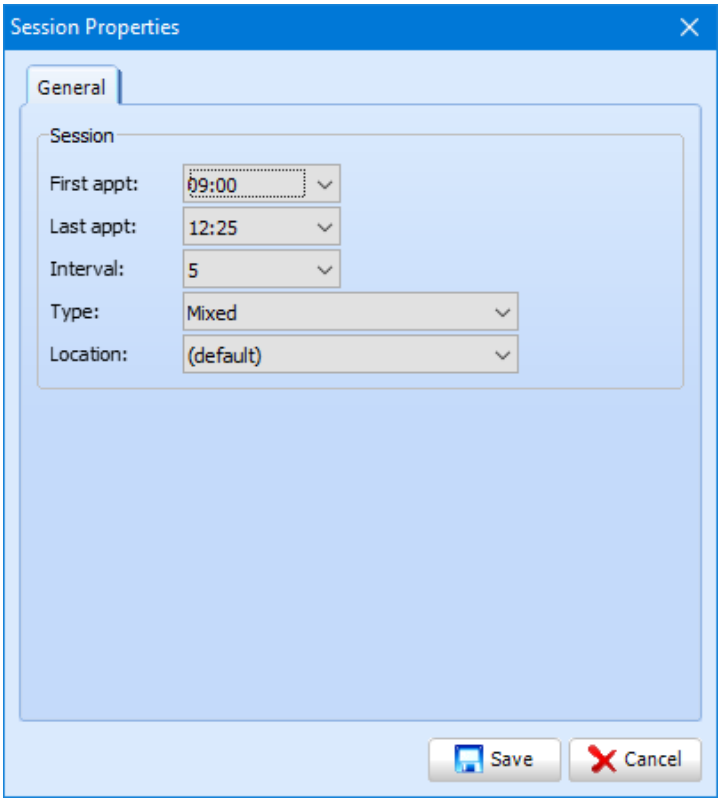
You will then be asked to confirm that you wish to add a new week to the cycle, click on the **Yes** button to continue.



A new Week tab will now appear on the **Appointment Book Properties** window with a 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.

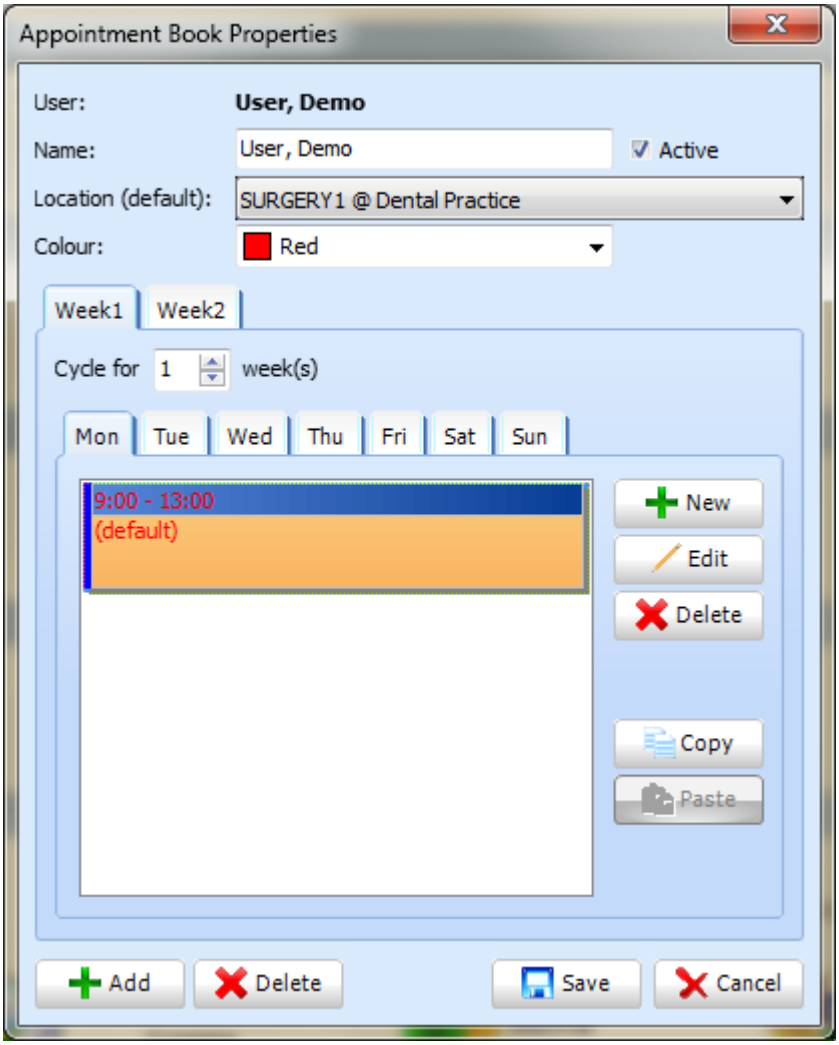


Below the week tabs, there will be a number edit were you can enter a number, this number is for the amount of weeks you want that particular week to cycle for until you move onto the next week in your rota.
Now once you have added more weeks and decided how many times those weeks should cycle for, the next step will be to start adding in the session working hours within the day tabs. To do this click on the day your performer will be working, and click on the **New** button.

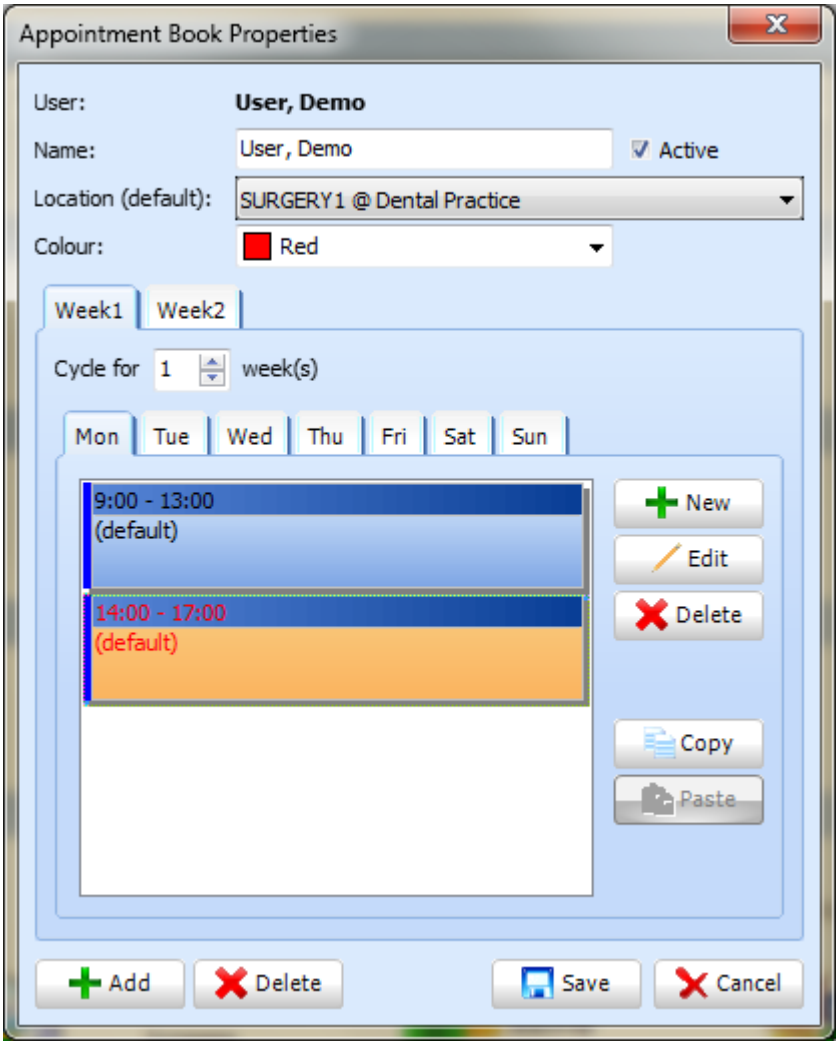


The **Session Properties** window will now display. Within this window you will be able to set the time the session will start and finish via the **First appt** and **Last appt** drop down lists, what interval duration you would like your books to have and the type of session you would like to create. **(Refer to session types)** The **Location** drop down list allows you to set a location for this session. If you leave this as default, it 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 need to go back into a session, double click on the session you would like to edit, or highlight the session and click the **Edit** button, which is located under to the right hand side of the window. To delete a session, click it then press 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.



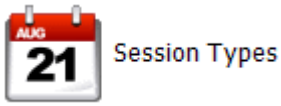
Once you have completed the sessions for one day, you can easily copy those sessions to another day by highlighting the top session and clicking on the **Copy** button to the right of the window. If you then select another day tab and click the **Paste** button, located under the **Copy** button. This 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.

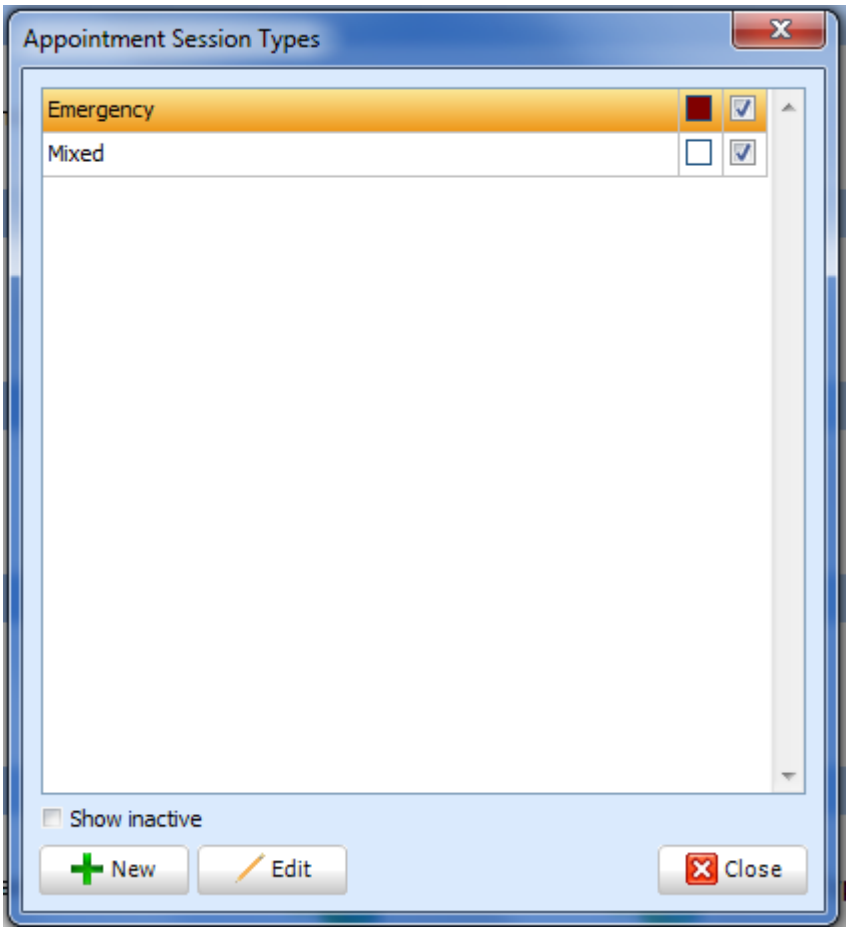
Session Types

SFD allows you to personalise the appointment book in many ways, adding session types to the performer's books is one of them. A use for creating your own sessions could be for lunch breaks, if lunch breaks are not added in as a session the appointment book blocks out the break between sessions therefore no appointments can be booked during this time. Some performers like to have the option to book appointments during lunch. The steps below show you how to configure this option.

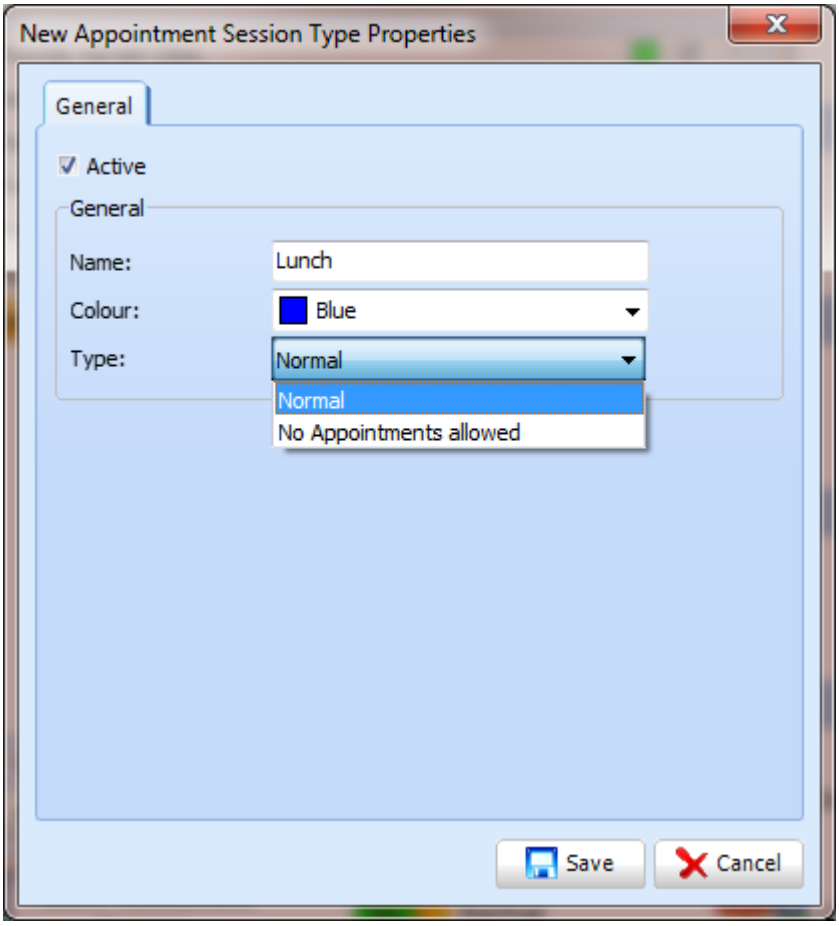
To access the session type's setup, click on the **Tooth icon** in the top left hand corner of your screen and select **Setup**. Click on the **Session Types** button, which will be located under the **Appointment Bar.**



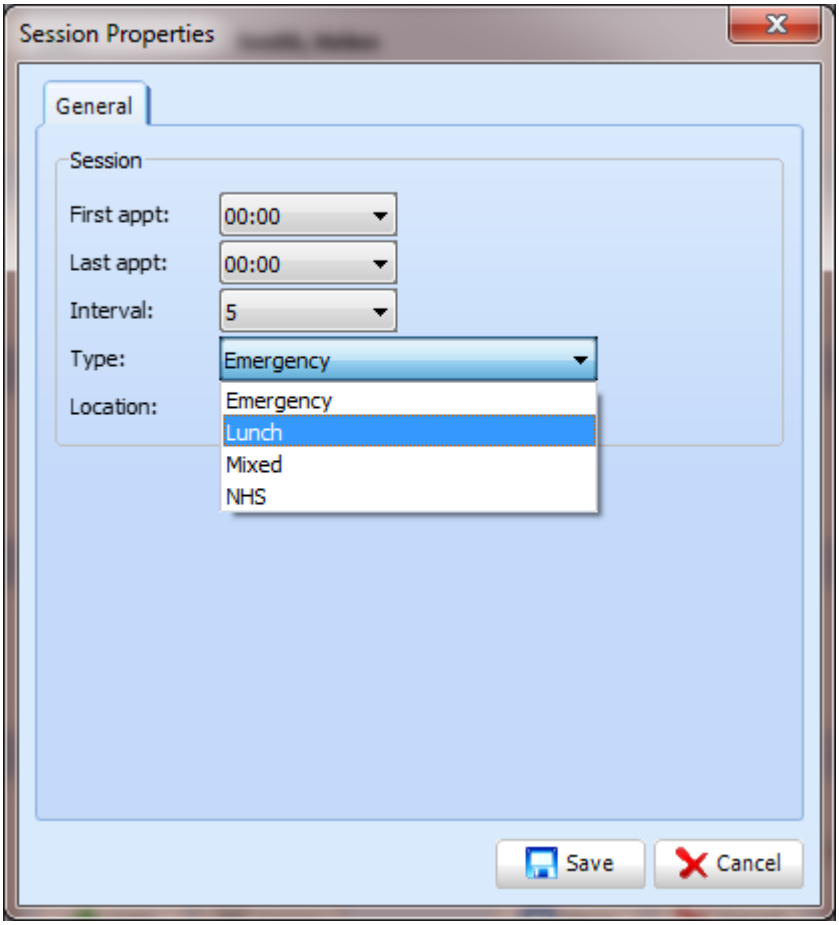
The **Appointment Session Types** window appears. Here you will see a list of your existing session types, to add a session type, click on the **New** button in the bottom left hand corner of the window.



After clicking **New**, the **New Appointment Session Type Properties** window appears. Here you can fill in the sections to personalise the session type. Once you have entered all the values, click the **Save** button.



Now when you are setting up the appointment book you will be able to choose **Lunch** as a Type from the drop down list.



Setting up the appointment book up in this way allows the receptionist to clearly see which part of the day is dedicated for booking appointments.

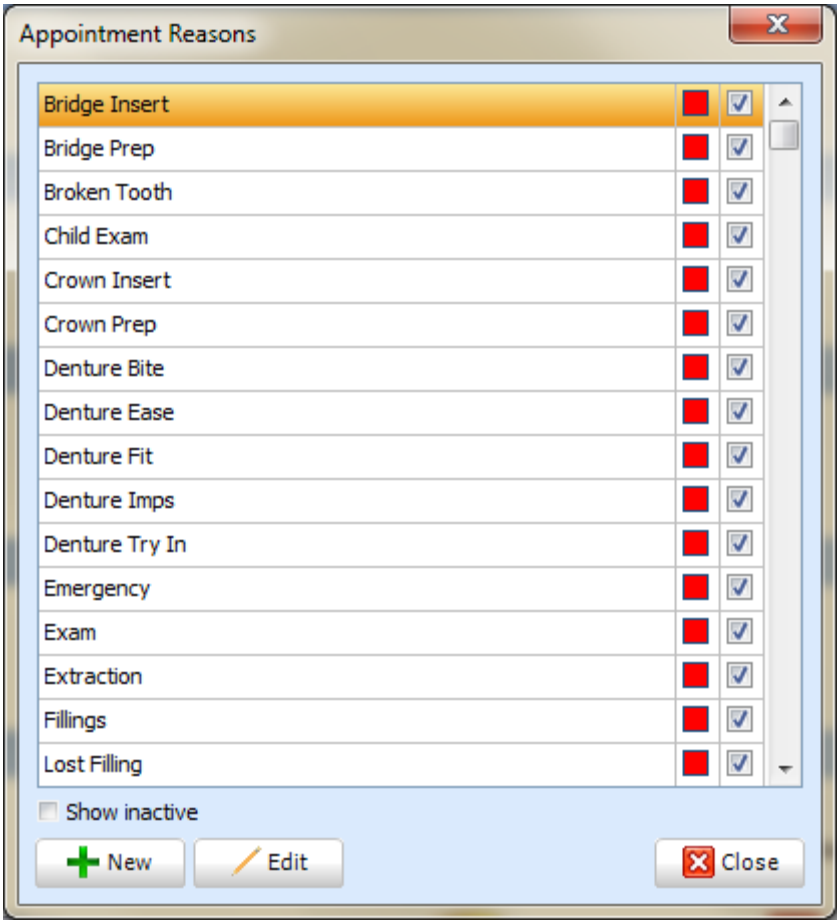
Appointment Reasons

When booking an appointment, you will choose from a list of reasons for the appointment. Within the reason setup you have the ability to add new reasons.

To access the reasons setup, click on the **Tooth icon** in the top left hand corner of the screen, and select setup, click on the **Reason** button which should be located under the **Appointment Bar**.

The **Appointment Reason** window will now appear showing a list of currently active reasons you can choose from. To see any inactive reasons click on the **Show Inactive** checkbox to the bottom left hand side of the window.

To edit any existing reasons, highlight the one you want and click on the **Edit** button or to add a new appointment reason, click on the **New** button to the bottom left of the window.



The **New Appointment Reason Property** window will now appear. From this window you can add the new appointment reason name, assign a colour and set a default duration (which can be changed at any time). You can also assign an urgent flag, points and web appointment. Click the **Save** button once you have entered all necessary information.

Your new Appointment Reason is now setup and active.

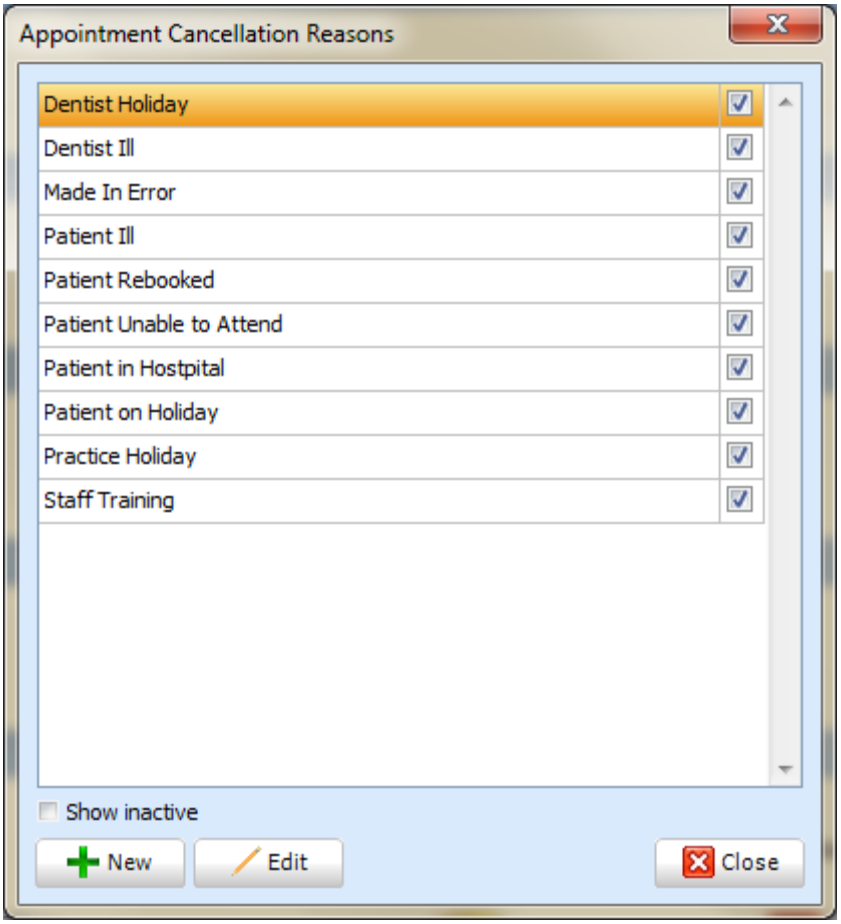
Cancellation Types

When cancelling an appointment, SFD will present you with another window asking you the reason the appointment is being cancelled. Within SFD you have the ability to add, edit or remove the reasons from that list.

To get access the cancellation types setup, click on the **Tooth icon** at the top left of SFD and select **Setup**. Click on the **Cancellation Type** button, which is located under the **Appointments Bar**.

Cancellation Types

The **Appointment Cancellation Reason** window will now appear showing you a list of currently active cancellation reasons you can choose from. To see any inactive reasons click on the **Show Inactive** checkbox to the bottom left hand side of the window.
To edit any existing reasons, highlight the one you want and click on the **Edit** button, to add a new cancellation reason, click on the **New** button to the bottom left of the window.



The **Appointment Cancellation Properties** window will now appear. Name this reason then select between **Requested by Practice** and **Requested by Patient**.

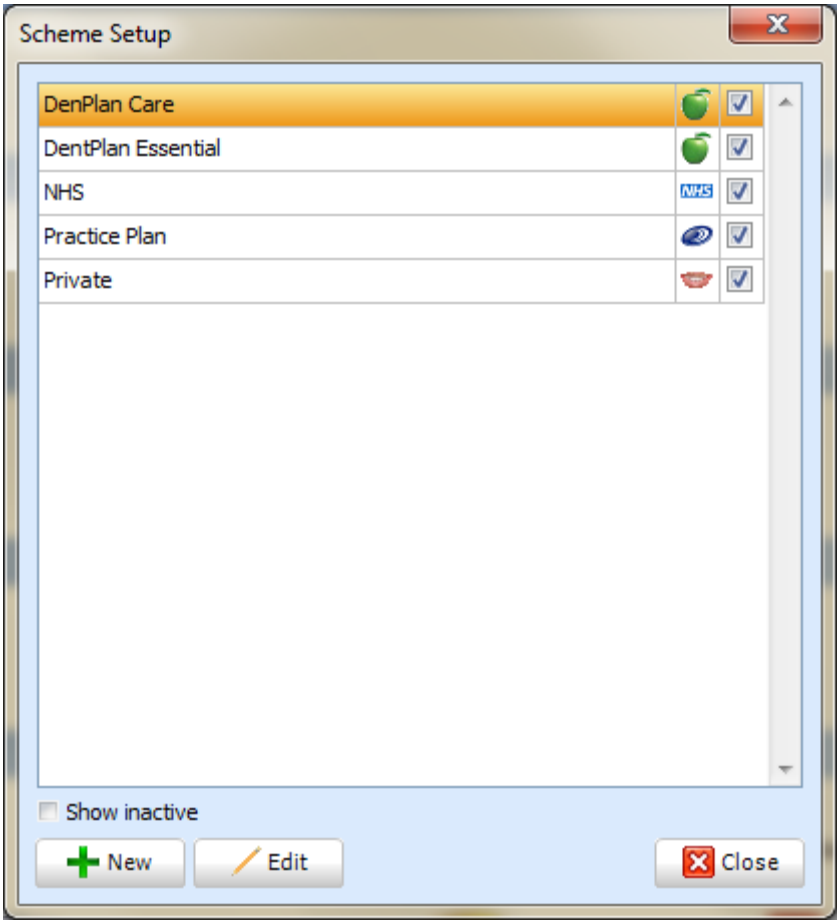
Your new appointment cancellation reason is now setup.

Product

Schemes

Within SFD you have the ability to create new schemes. For certain practices this could be beneficial, as you might want to create a new scheme with certain discounts etc.
To access the Schemes setup, click on the **Tooth icon at the top left** and select **Setup.** From there click on the **Schemes** button, which is located under the **Products Bar**

The **Scheme Setup** window will now appear. Within this window is a list of all your currently active schemes within the system. To see any inactive schemes click on the **Show Inactive** checkbox to the bottom left of the window. To edit an existing scheme, highlight the one you want and click on the **Edit button**, or to create a scheme click on the **New** button.



The **New Scheme Properties** window will now appear. Within this window enter the name of the scheme, choose the graphic you want displayed for the scheme. The colour, and which icon for the B4R4 appointment book option you would want to use.

The next stage of the setup is **Mixed Schemes**. This gives you the ability to open up treatment forms under different schemes even if the patient is setup for another scheme. Click the checkboxes for each scheme you want to possibly open up when creating a treatment form for a patient under this scheme.

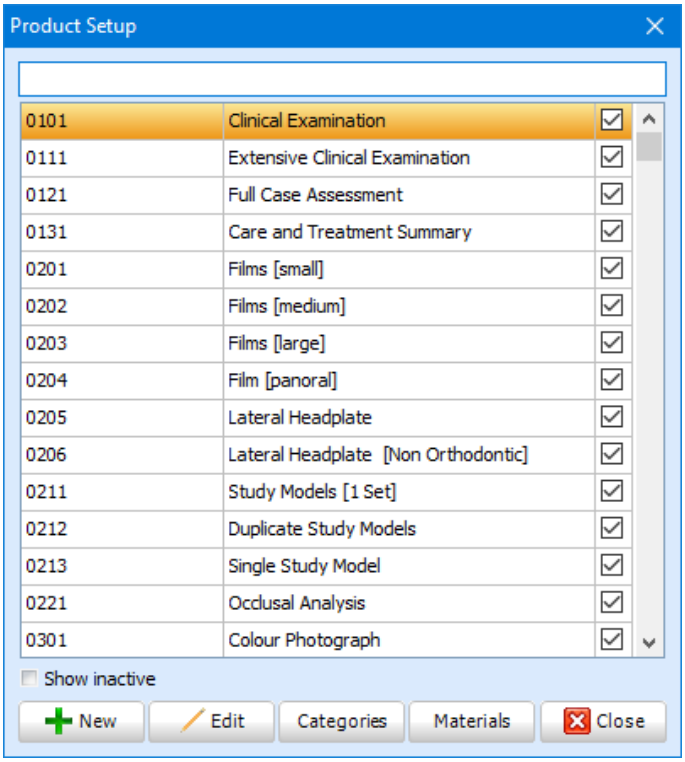
Once you have entered all the details in that window click on the **Save** button. Your new scheme will now be setup and active within the system.

Item

Within SFD, you have the ability to add new items, edit existing ones, and remove any which you may not want appearing within treatment forms. You can do all this within the Items setup.
To access to the Item setup, click on the **Tooth icon** at the top left of SFD and enter **Setup**. From there click on the **Items** button, which is located under the product bar.

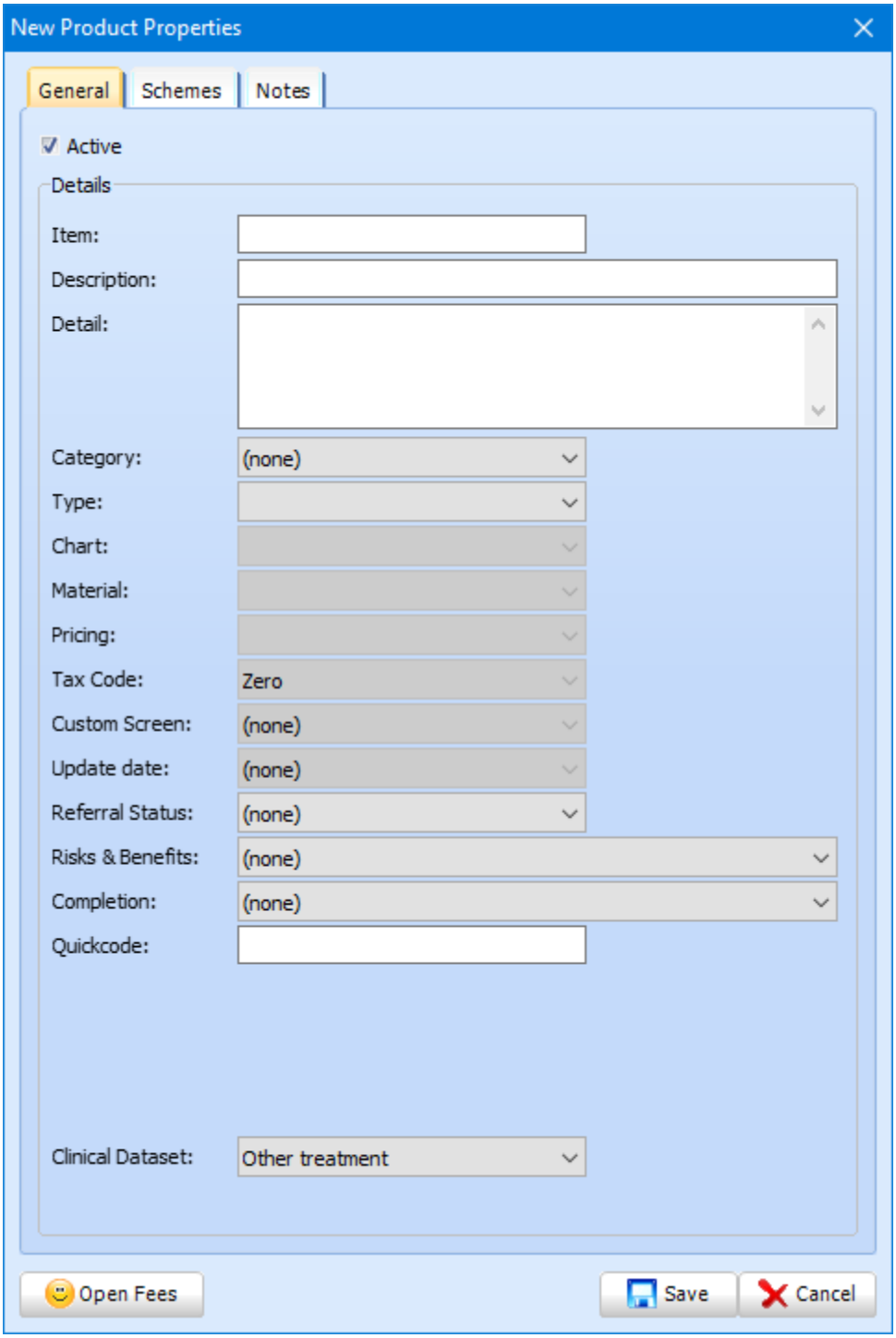
The **Product Setup** Window will now appear. Within this window is a list of all active treatment items within the system. To see any inactive treatment items, click the **show inactive** checkbox in the bottom left hand corner of the screen.

To edit an existing item, highlight it and click on the **Edit** Button. To create a new item click on the **New** button.



The **New Product Properties** window will now appear.

Enter the **Item** (code) and **Description** (name). If your item is tooth specific, select the **Type** as **Tooth** and then select the **Chart** and **Material**.

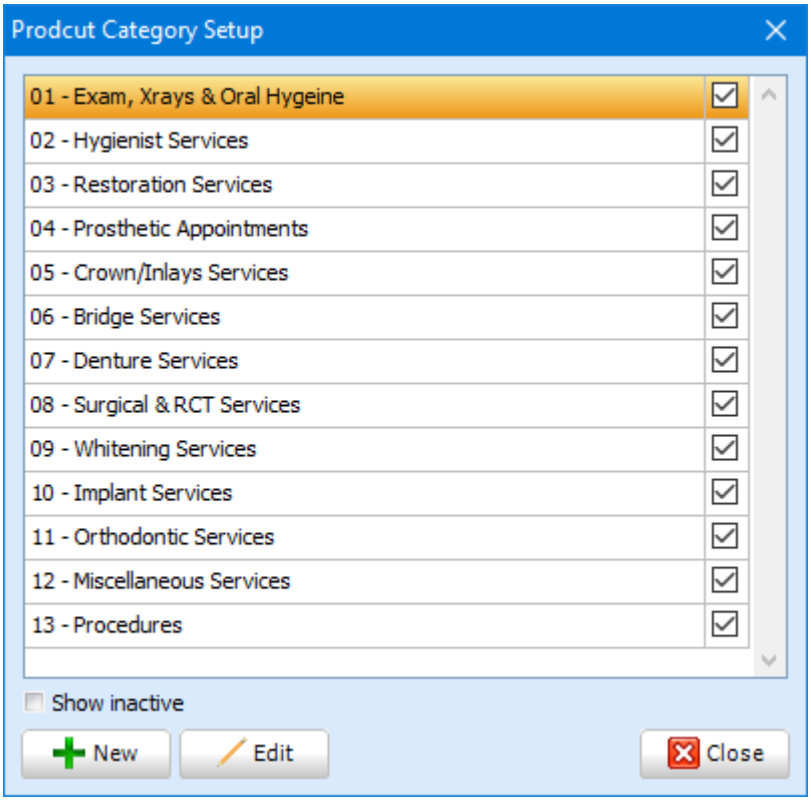


The next tab is the **Schemes** tab. Within this tab you can enter the start and end dates for the schemes you want the item included in, and the price (or banding for NHS items) of the item you are trying to create.

The final tab is **Notes** where any notes about an item can be entered,

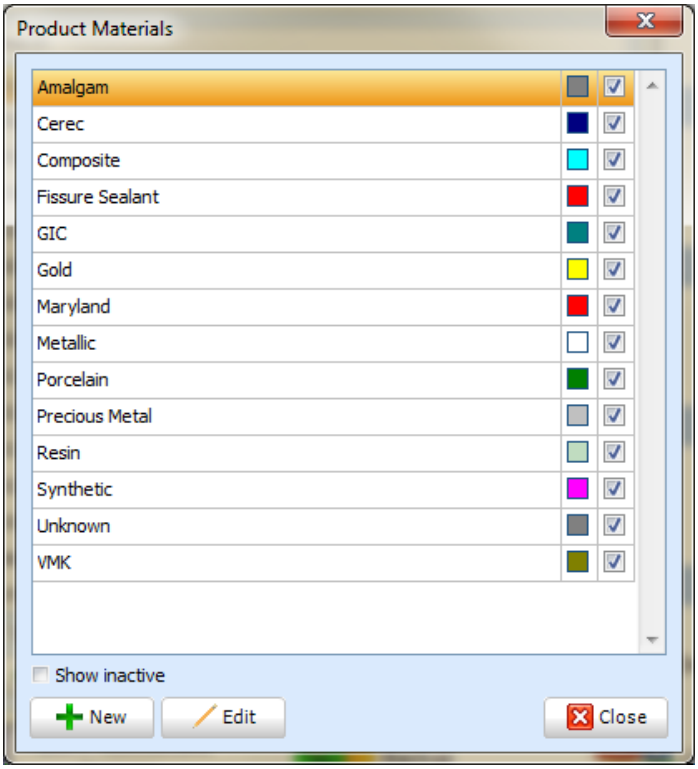
Once you are happy with all the details you have added, click on the **Save** button in the bottom right hand side of the window.

To create a new category to link your items to click on the **Categories** button. This should open up the **Setup** window. Within this window is a list of all the currently active item categories you have within the system. To edit an existing category, highlight the one you want and click on the **Edit** button. To create a new Categories click on the **New** button.



The **New Product Category Properties** window will now appear. Enter the name of the category you wish to create. Once that is filled in, click on the **Save** button to the bottom right hand side of the window. Your new category should now be active and visible within the previous list.

To create or edit any existing material, return to the **Product Setup** window and click on the **Materials** button which is located in the bottom right hand side of the window.
The **Product Materials** window will now appear. Within this window is a list of all your materials which you can use within the system. To edit an existing material, highlight the one you want and click on the **Edit** button. To create a new material, click on the **New** button.

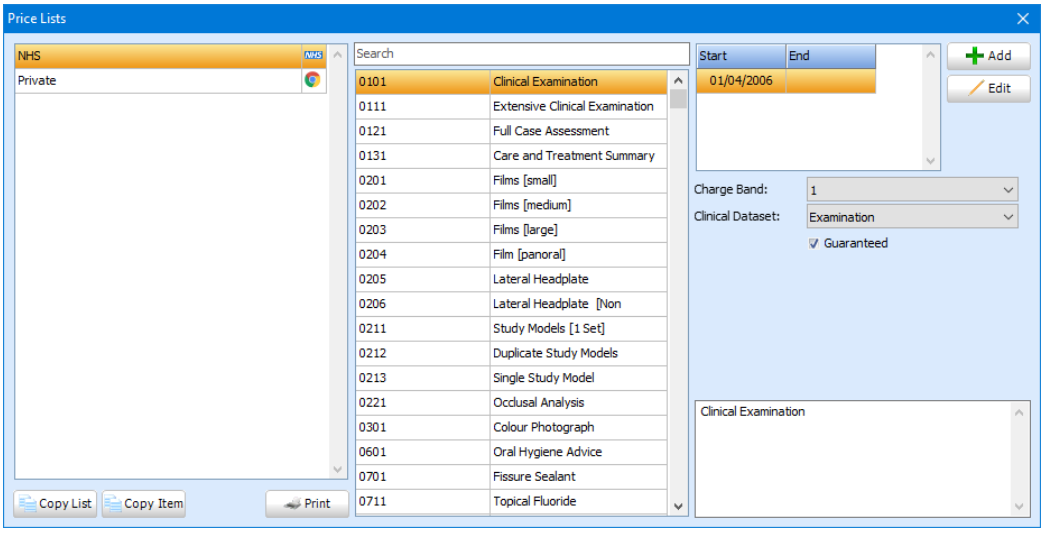


The **New Product Materials Properties** window will now display. Type in the name of the product material and select the colour. Next, select which type you want to link this material with by ticking the checkbox. Click **Save** to save your changes.

Price List

To view a price list, click the **Price Lists** button under the **Products** section.

A list of all active items are displayed with the start and end dates to the right. The list is on a scheme by scheme basis.



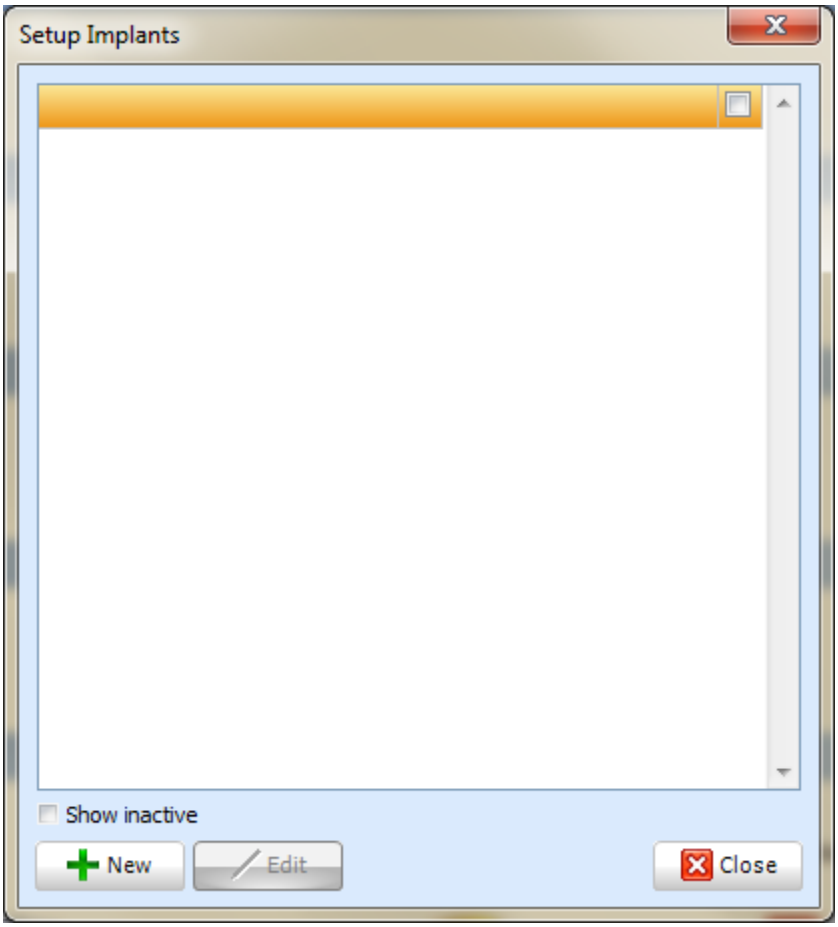
Implants

Within SFD you have the ability to chart implants for patients. SFD has the ability to enter different types of implants within the Implant setup.

To access the Implant setup, click on the **Tooth icon** at the top left and then select **Setup**. From there click on the **Implant** button, which is located under **Products Bar.**

The **Setup Implants Window** will now appear. Within this window is a list of the all the current active implants you have setup within the system. To see any that are inactive click on the **Show Inactive** checkbox in the bottom left hand corner of the screen.

To edit an existing implant, highlight it and click on the **Edit** button. To create a new implant, click on the **New** button.



The **New Implant Properties** window will now appear. Within this window enter the details regarding the new implant you are creating. Once all the fields have been completed click on **Save**. Your new implant has now been created and should be ready to use within the system.

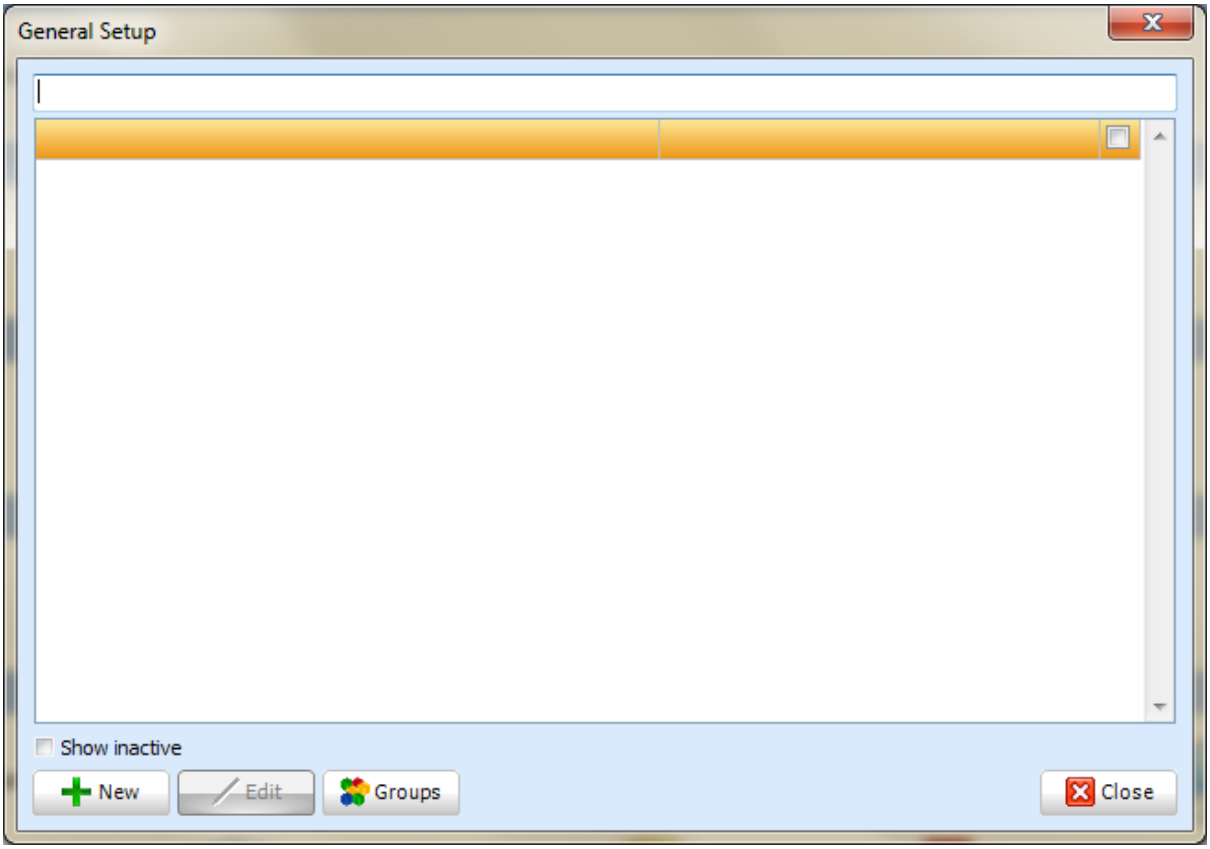
Contacts

General

To access the general contacts setup, click on the **Tooth icon at the top left** and select **Setup**. From there click on the General button which is located under the **Contacts bar**.

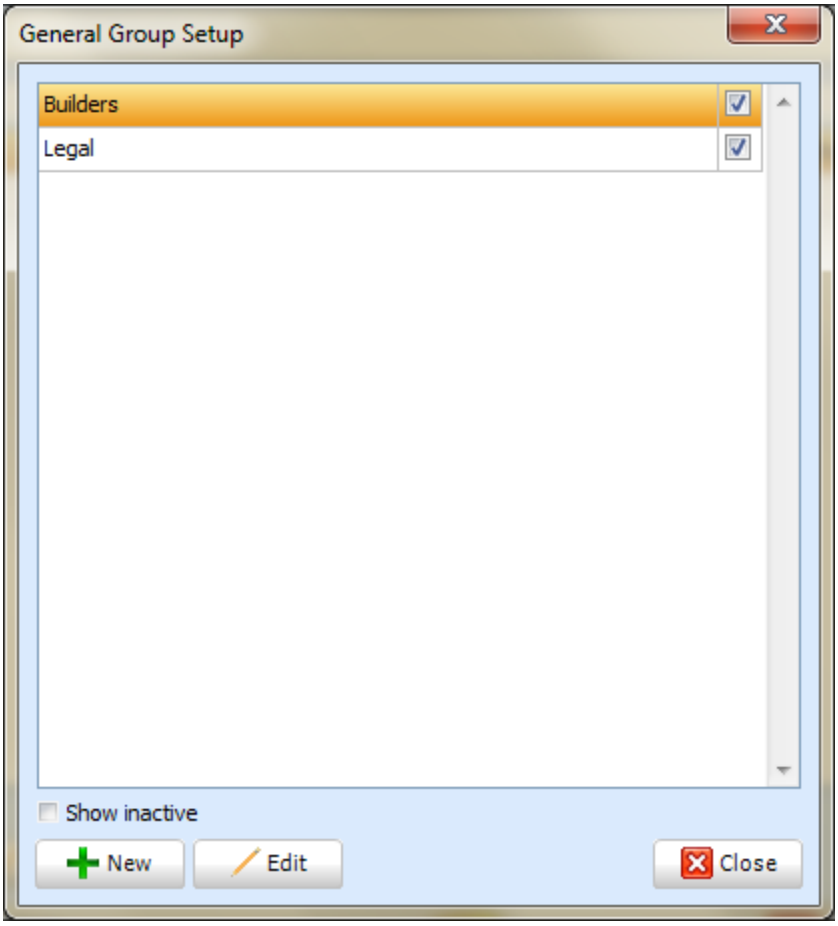
The **General Setup** will now appear showing you a list of currently active general contacts on the system. To see any inactive contacts click on the **Show Inactive** checkbox to the bottom left hand side of the window.

The filter at the top of the window allows you to easily navigate to the contact you would like to possibly edit, or make inactive, by either typing in the partial or full name of the contact.
To edit any existing general contacts highlight the one you want and click on the **Edit** button or to add a new general contact, click **New**.

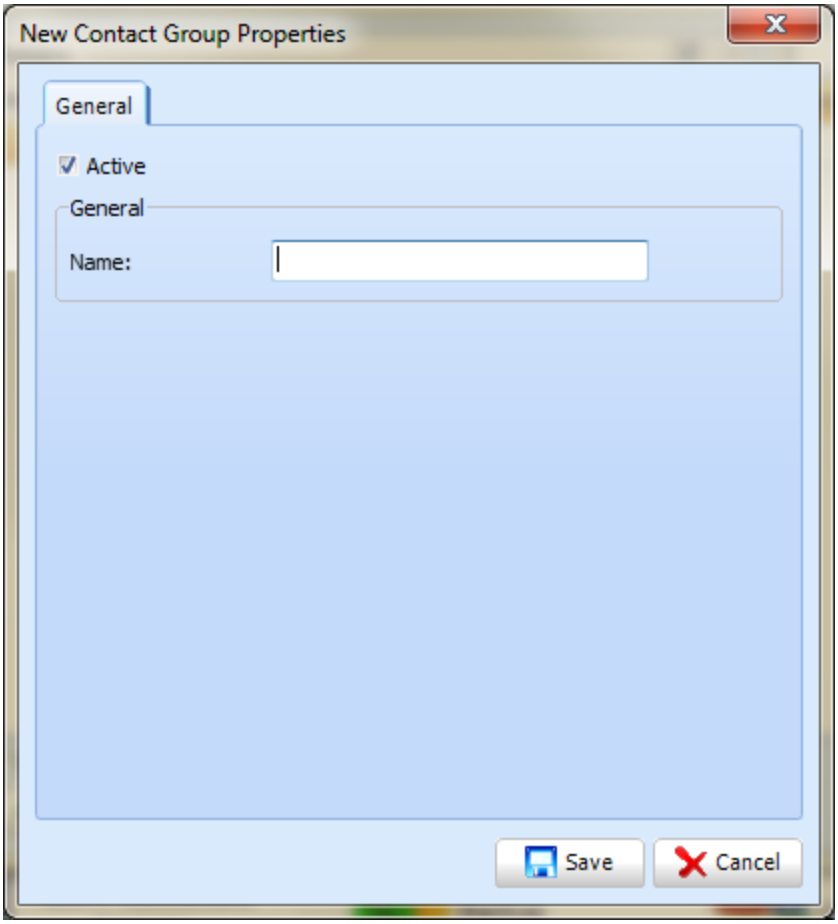


Within the **Contacts** window you also have the option to filter contacts by groups. To view the contact groups you currently have setup within SFD click on the **Groups** button.

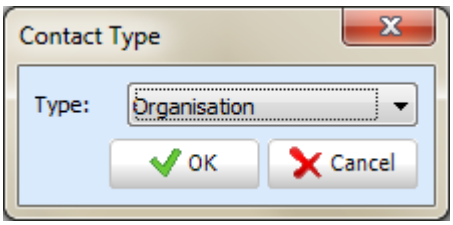
The **General Group Setup** window appears. This will list all your current active general groups within the system. To edit an existing group highlight the one you want, and click the **Edit** button, or to create a group click on the **New** button.



This will bring up the **New Contact Group Properties** window. Enter the name you want your group to be called and click on **Save**, Your New group will now be visible within the Contacts window of the system.

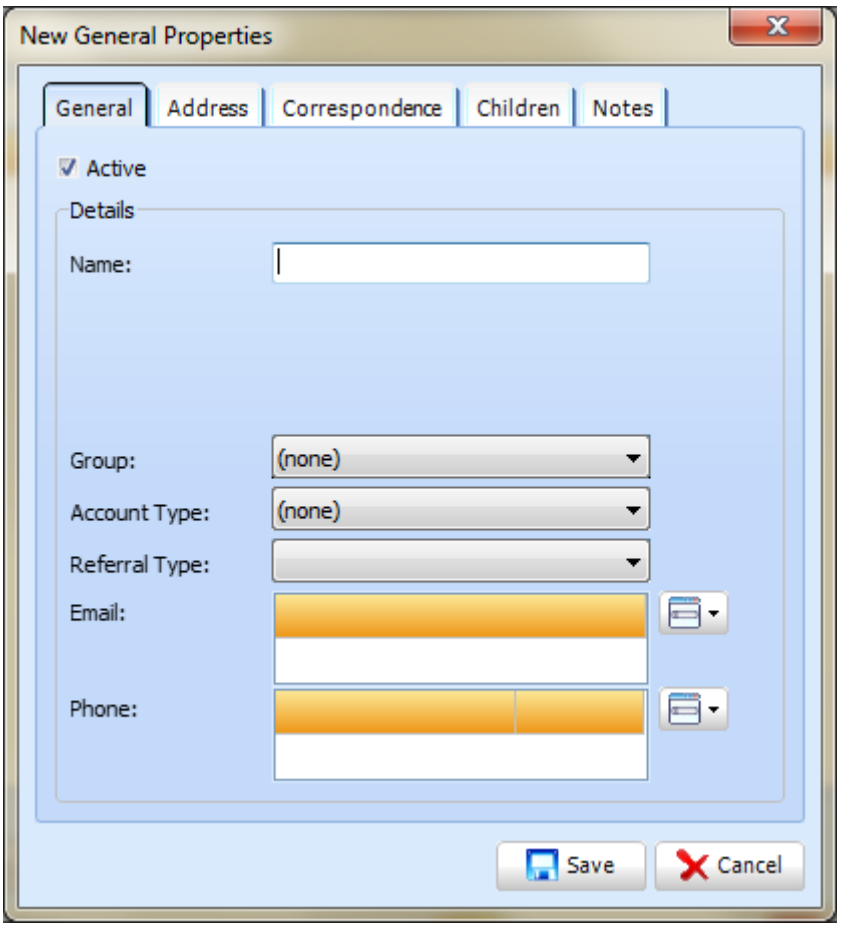


When creating a new contact the **Contact Type** window appears. Here you can choose the contact type, you would like to create. You have the choice between organisation and person. Click on the type you want from the dropdown list and click the **OK** button.



The **New General Properties** Window will now appear. This window is the setup for the Organisation type.

The first tab is **General.** In here you will be able to enter the name of the contact, account type, referral type and the contact details of your new general contact.



The next tab is the **Address** tab; enter the address details of the contact into the corresponding textboxes.

Within the **Correspondence** tab, you can enter the salutation and closing sentences in the corresponding textboxes ***(refer to documents).***

The next part of the setup is the **Contacts** tab. Within this tab you will be able to enter new contacts within the finance company you are setting up, click on the new button to start entering the new contacts details.

The final step in the setup is to enter any notes you would like to save regarding the general contact, this will be done in final tab names **Notes**.

Once you have filled in everything you can on the tabs shown above, click on the **Save** button to in the bottom right hand side of the window.

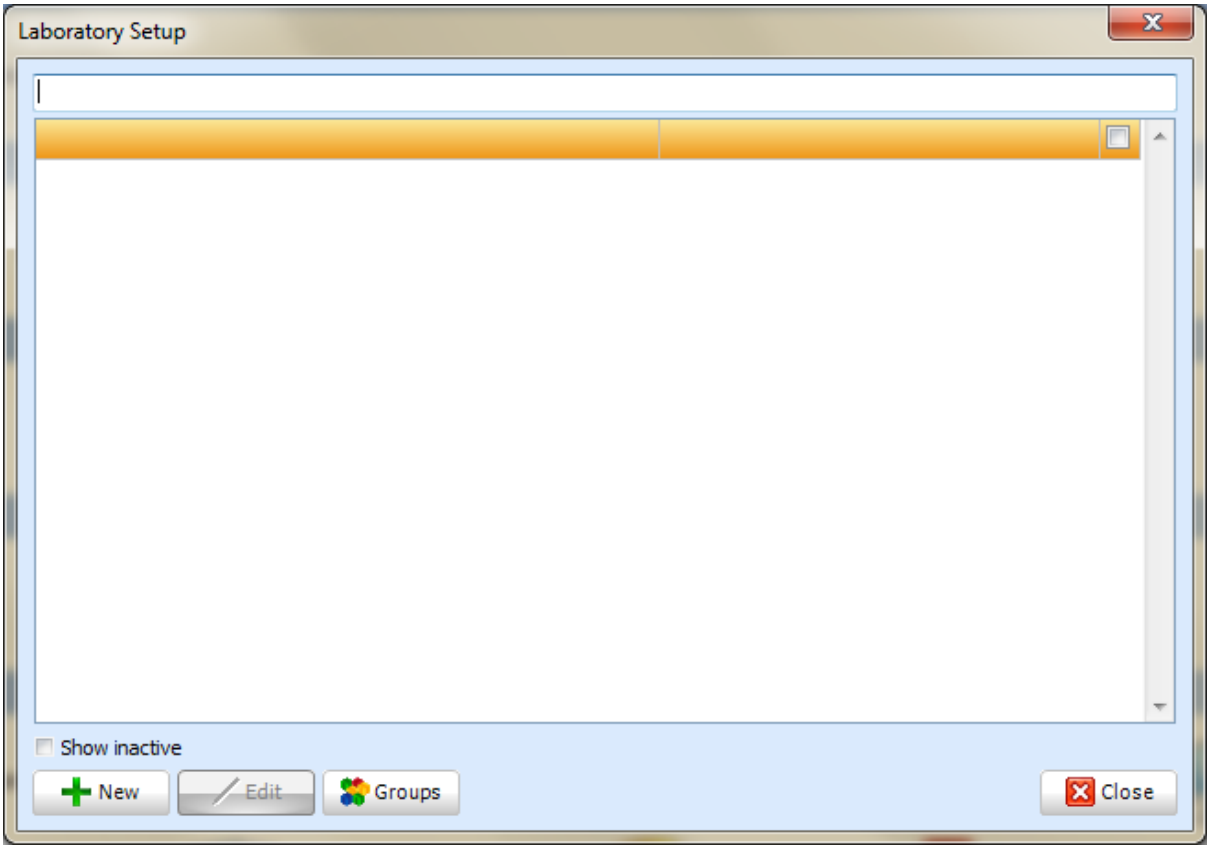
The new finance company should now be visible and active in the system.

Laboratories

To access the laboratories contacts setup, click on the **Tooth icon at the top left** and select **Setup**. Click on the **General** button, located under the **Contacts bar**.

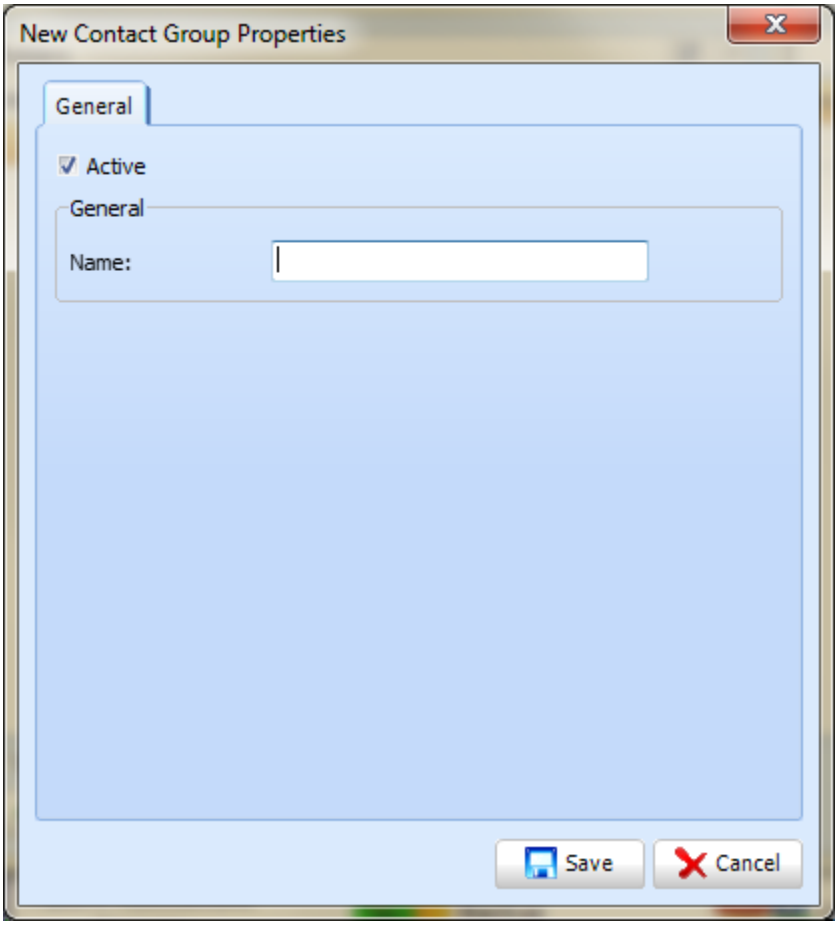
The **Laboratories Setup** will now appear showing you a list of currently active general contacts on the system. To see any inactive contacts click on the **Show Inactive** checkbox to the bottom left hand side of the window.

The filter at the top of the window allows you to easily navigate to the contact you would like to possibly edit, or make inactive, by either typing in the partial or full name of the contact.
To edit any existing laboratory contacts highlight the contact then click on the **Edit** button, to add a new laboratory contact, click on the **New** button to the bottom left of the window.

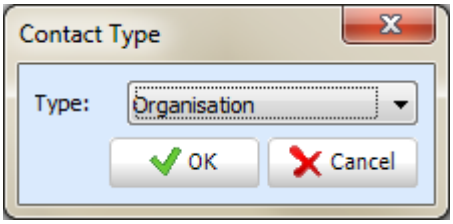


Within the **Contacts** window you also have the option to filter contacts by groups. To view the contact groups you currently have setup within SFD click on the **Groups** button.
The **Laboratory Group Setup** window appears. This will list all your current active general groups within the system. To edit an existing group, select it and click the **Edit** button, or to create a group click on the **New** button.

This will bring up the **New Contact Group Properties** window. Type in the name you wish your group to be called and click **Save**. Your new group will now be visible within the **Contacts** window of the system.

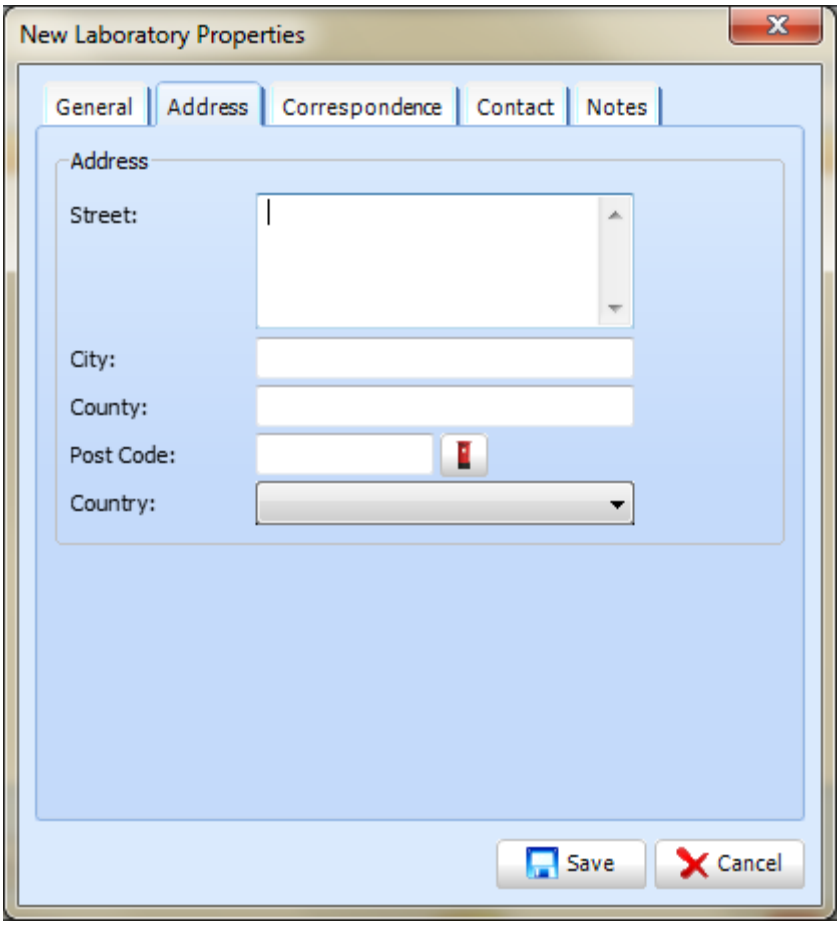


When creating a new laboratory contact the **Contact Type** window appears. Here you can choose the contact type, you would like to create. You have the choice between organisation and person. Click on the type you want from the dropdown list and click the **OK** button.



The **New Laboratory Properties** window appears. This window is the setup for the Organisation type. You will notice if you picked the other type of contact, there will be less tabs and less fields to fill in.
The first tab will be **General**; in here you will be able to enter the name of the contact, account type, referral type and the contact details of the contact. You also have the ability to put the contact into a group.

The next tab is the **Address** tab; enter the address details of the contact into the corresponding textboxes.



Within the **Correspondence** tab, you can enter the salutation and closing sentences in the corresponding textboxes. ***(Refer to documents).***

The next part of the setup is the **Contacts** tab, within this tab you will be able to enter new contacts within the organisation you are setting up, click on the **New** button to start entering the new contacts details.

The final step in the setup is to enter any notes you would like to save regarding the contact, this will be done in the final tab names **Notes**.

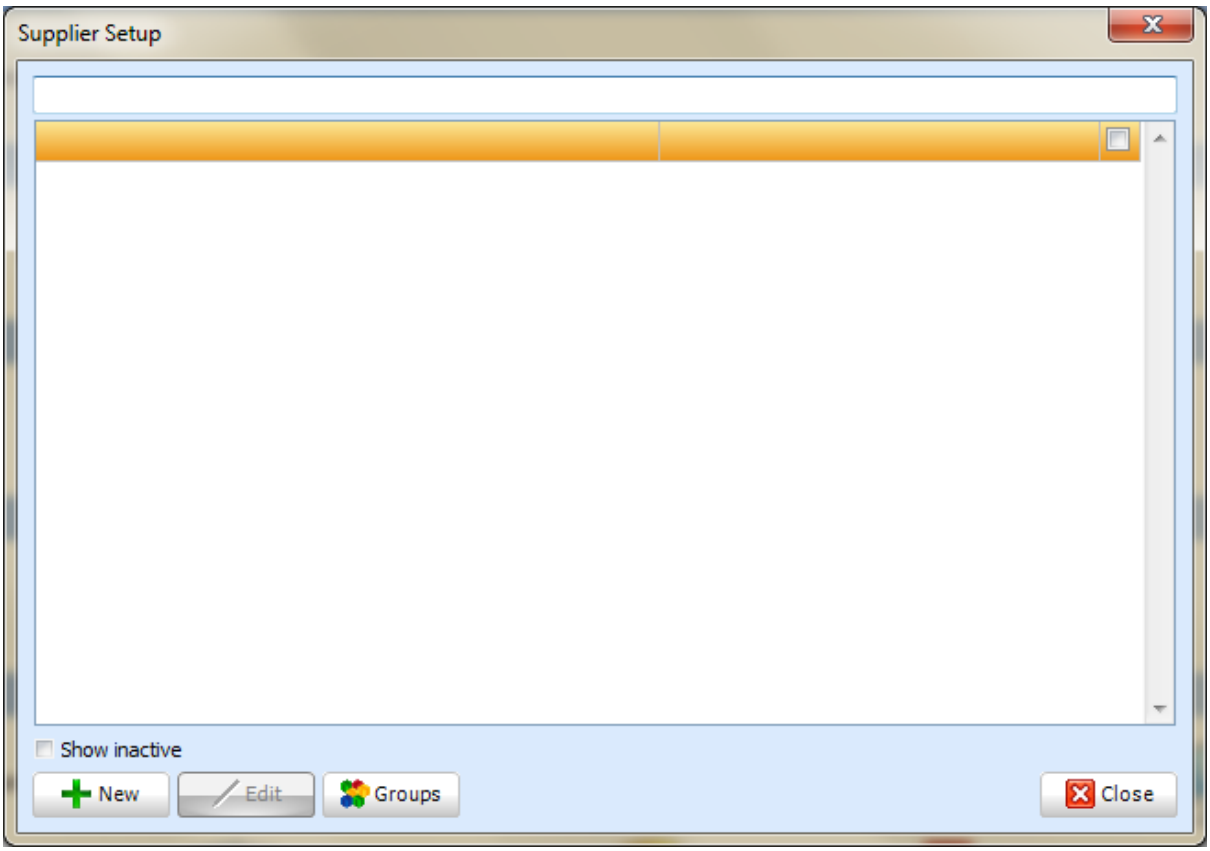
Once you have filled in everything you can on the tabs shown above, click on the **Save** button to on the bottom right hand side of the window.
Your new contact should now be visible and active in the system.

Suppliers

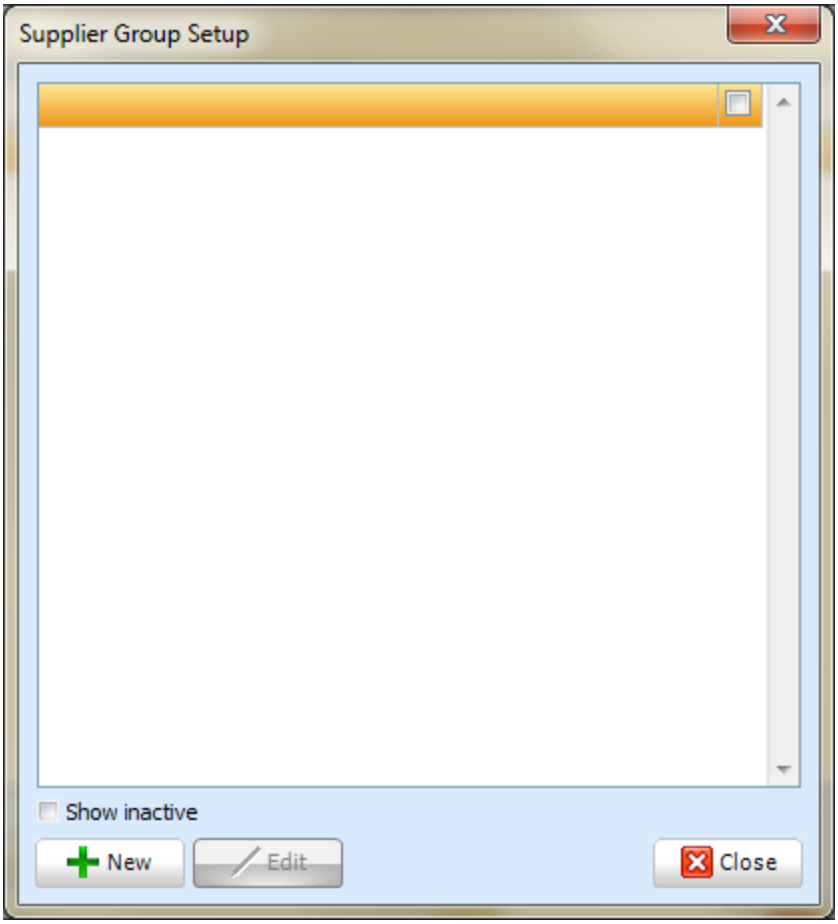
To access the Suppliers contacts setup, click on the **Tooth icon** in the top left of SFD and select **Setup**. From there click on the **General** button, located under the **Contacts bar**

The **Supplier Setup** will now appear showing you a list of currently active general contacts on the system. To see any inactive contacts click on the **Show Inactive** checkbox to the bottom left hand side of the window.

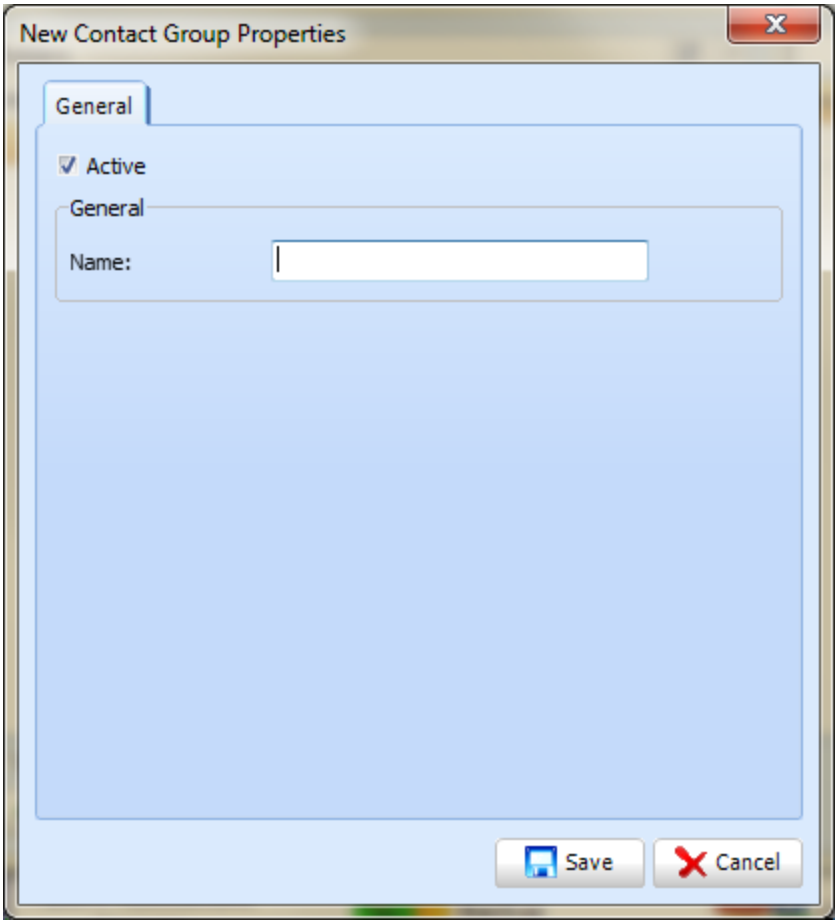
The search filter at the top of the window allows you to easily navigate to the contact you would like to possibly edit, or make inactive, by either typing in the partial or full name of the contact.
To edit any existing supplier contacts highlight the one you want and click on the **Edit** button, to add a new supplier contact, click on the **New** button to the bottom left of the window.



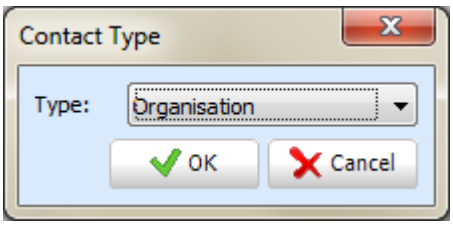
Within the **Contacts** window you also have the option to filter contacts by groups. To view the contact groups you currently have setup within SFD click on the **Groups** button.
The **Supplier Group Setup** window appears. This will list all your current active general groups within the system. To edit an existing group highlight the one you want, and click the **Edit** button, or to create a group click on the **New** button.



This will show the **New Contact Group Properties** window. Type in the name you would like your group to be named then click **Save**. Your new group will now be visible within the Contacts window of the system.

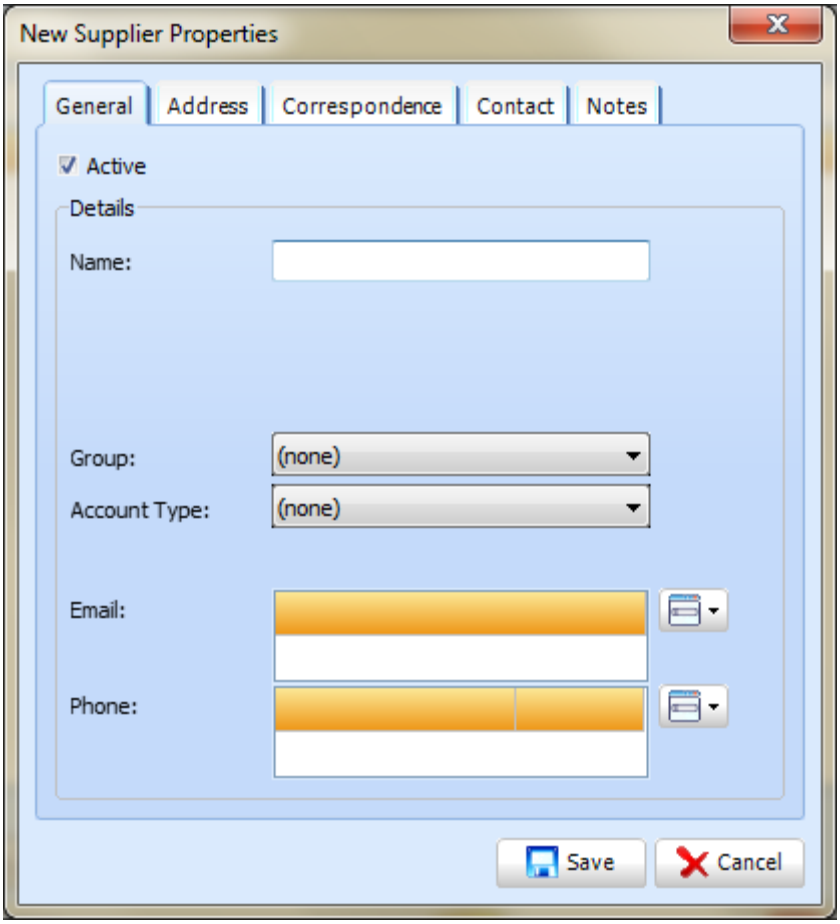


When creating a new contact the **Contact Type** window appears where you can choose the contact type you would like to create. You have the choice between organisation and person. Select the desired option then click **OK**.

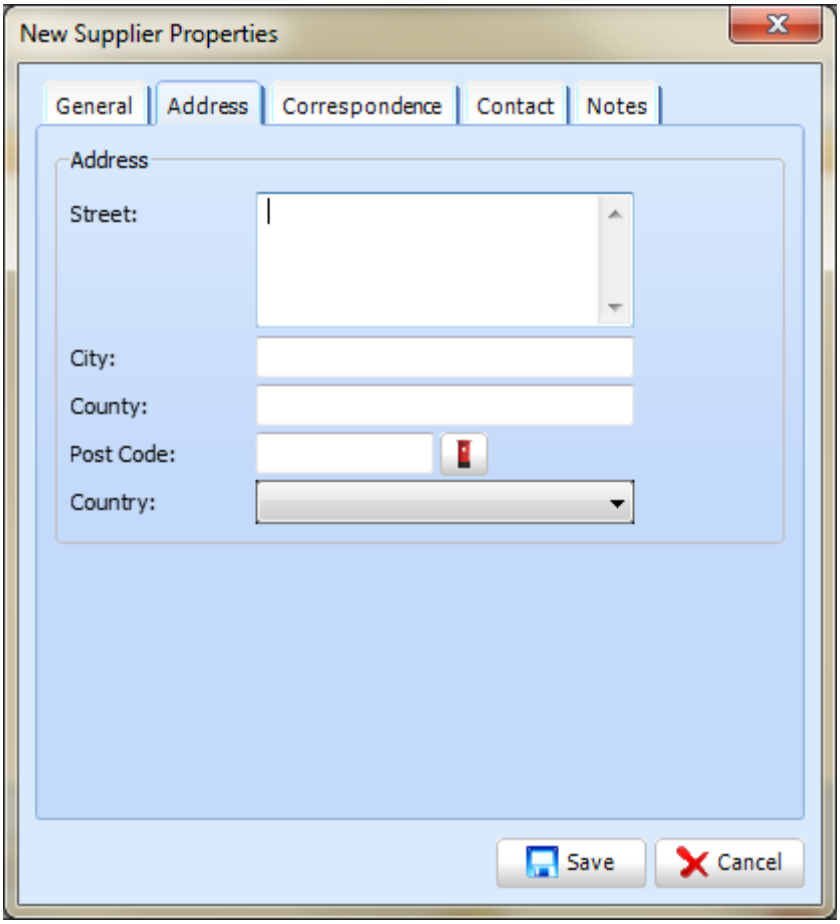


The **New Supplier Properties** window will now appear. This window is the setup for the Organisation type.

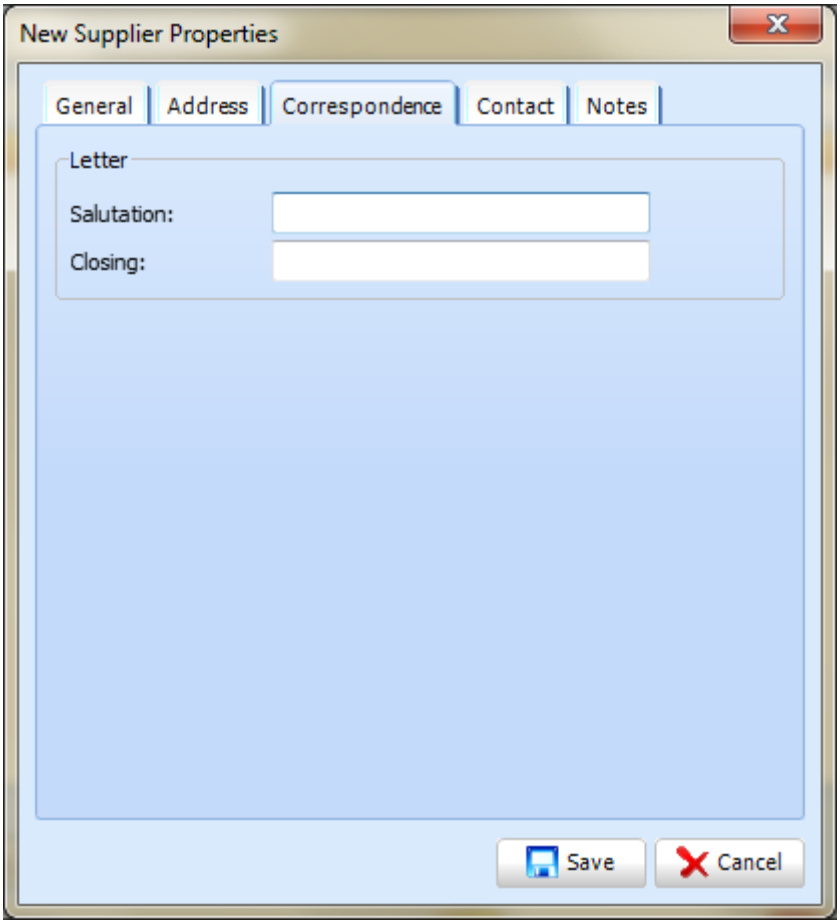
The first tab will be **General**; in here you will be able to enter the name of the contact, account type, referral type and the contact details of said organisation. You also have the ability to put the contact into a group.



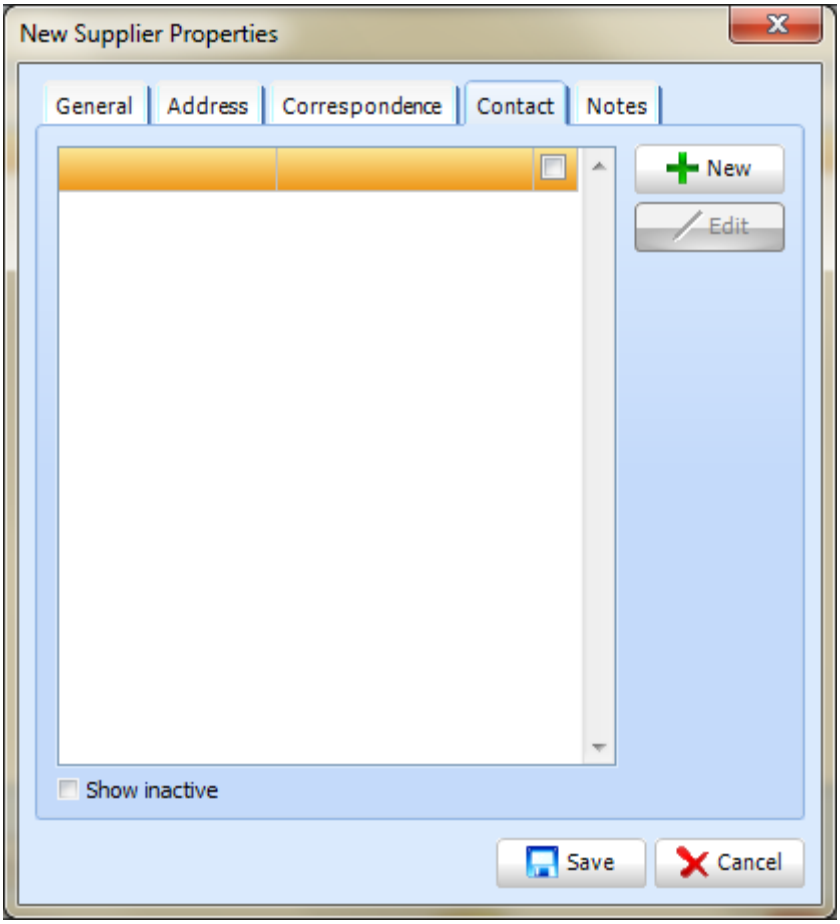
The next tab is the **Address** tab; enter the address details of the contact into the corresponding textboxes.



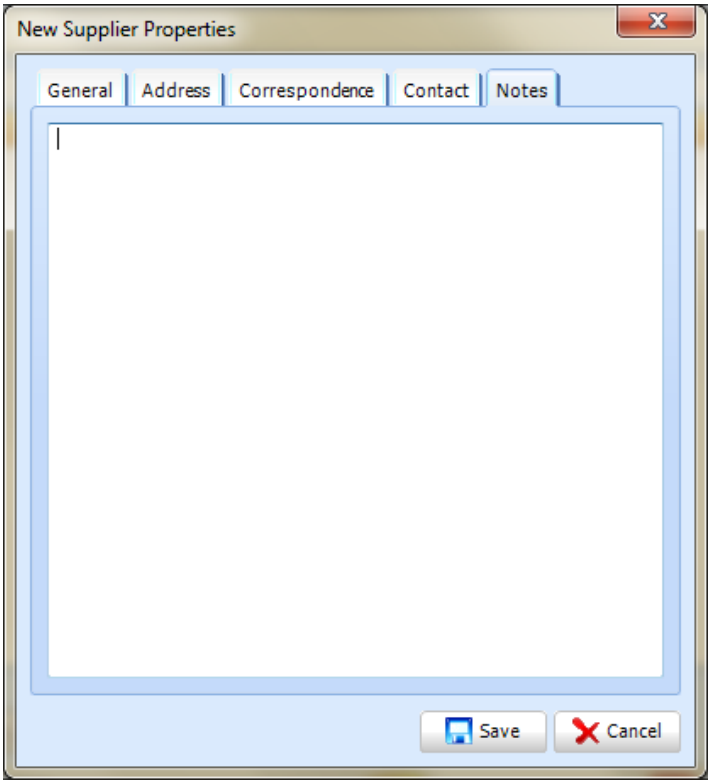
Within the **Correspondence** tab, you can enter the salutation and closing sentences in the corresponding textboxes. ***(Refer to documents).***



The next part of the setup is the **Contacts** tab, within this tab you are able to enter new contacts within the organisation you are setting up, click on the **New** button to start entering the new contacts details.



The final step in the setup is to enter any notes you would like to save regarding the organisation, this will be done in final tab named **Notes**.

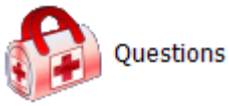


Click **Save** to save your changes.

Medical

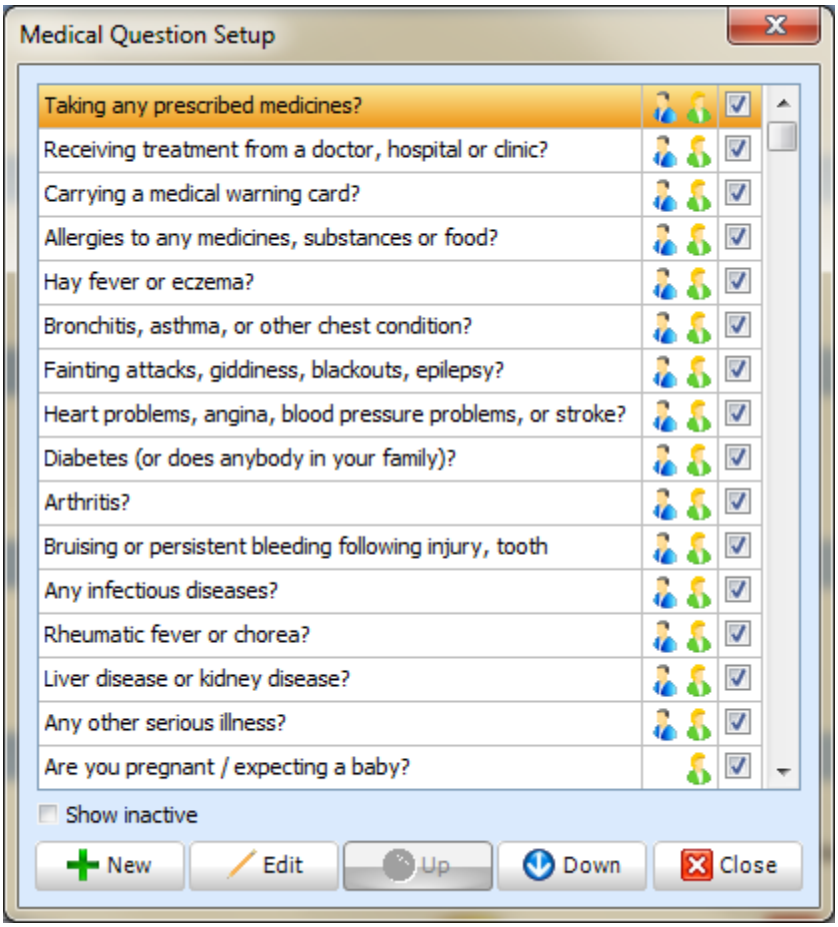
Questions

Within the Medical Setup you will be able to create, edit, or remove questions from the medical questionnaires.
To access the Questions setup, click on the **Tooth icon** at the top left and select **Setup**. From there click on the **Questions** button, which is located under the **Medical Bar**.

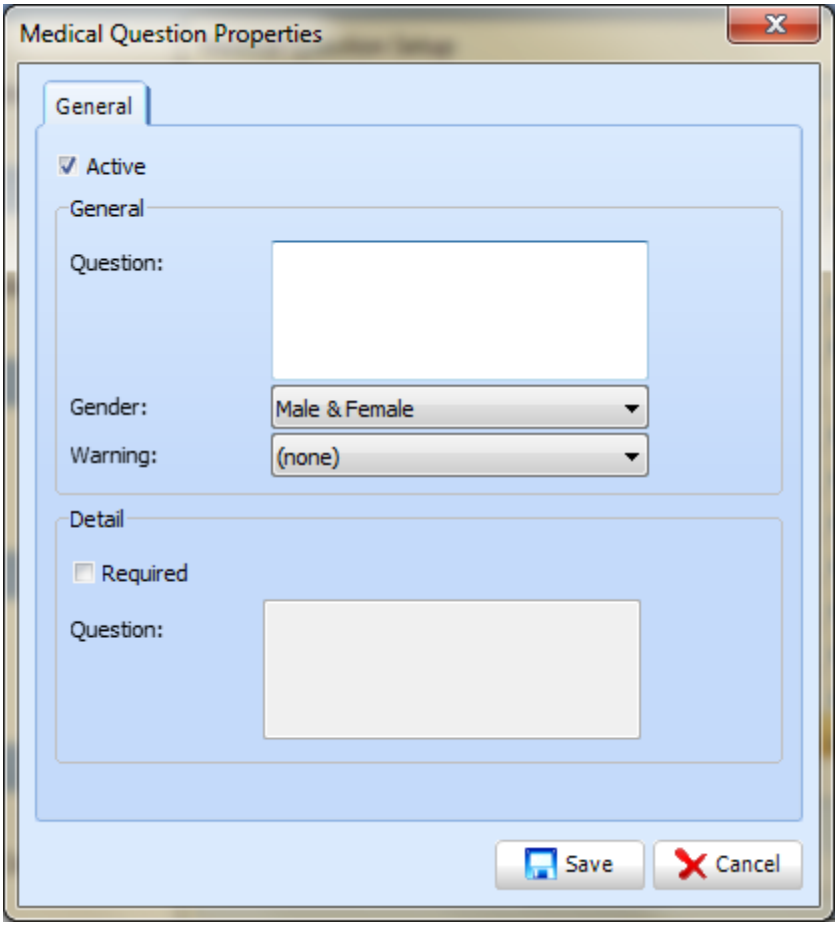


The **Medical Questions Setup window** will now appear showing you a list of all the current active questions. To see any inactive questions click on the **Show Inactive** checkbox. To the right of the question, there is an indication for male/female or possibly both genders.

To change the order of the questions on the assessment screen you can highlight a question and use the **Up** and **Down** arrow buttons to change the ordering of questions. To add a new question or change an existing one click on the **New** or **Edit** buttons.



The **Medical Questions Properties** window appears for both options.
Enter the question which you would like to create in the **Question** textbox. Next select which gender(s) the question should be asked to by clicking on the drop down menu.



The required checkbox is there in case a question needs more information from the patient, such as "Taking any prescribed medicine" the practice will possibly want to know which medicines and for what condition. So to activate this field, click on the **Required** checkbox, and in the question textbox type in the additional question(s).

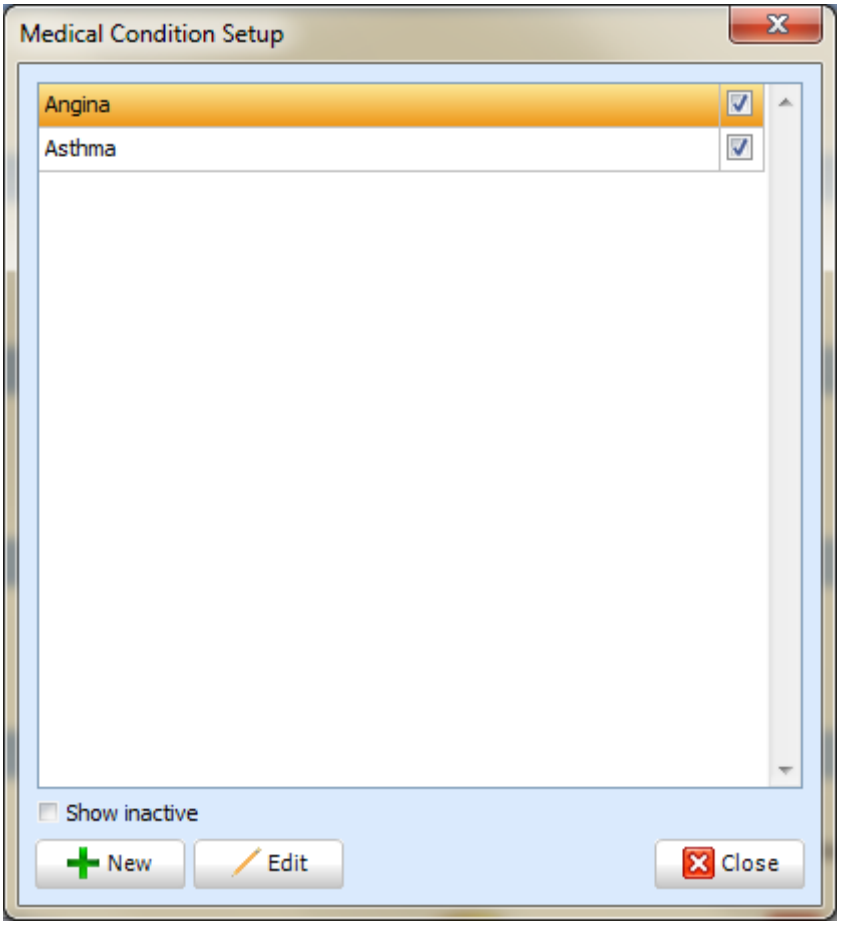
Click **Save** to save your changes.

Conditions

Within the Medical History Questionnaires, there is a conditions tab, which lists conditions such as Asthma or Angina, to complete the questionnaire the patient will look through these conditions and tick which he or she has. The conditions Setup is used for creating, editing or removing these conditions.

To access the **Conditions** setup, click on the **Tooth icon at the top left** and select **setup**. From there click on the **Conditions** button, which is located under the **Medical Bar**.

The **Medical Condition** Setup window will now appear. This window will list the current active conditions which appears on the medical assessment screen under the conditions tab. To see any inactive questions click on the **Show Inactive** checkbox.
To change an existing condition, highlight the one you want and click on the **Edit** button or to add a new condition click on the **New** button.

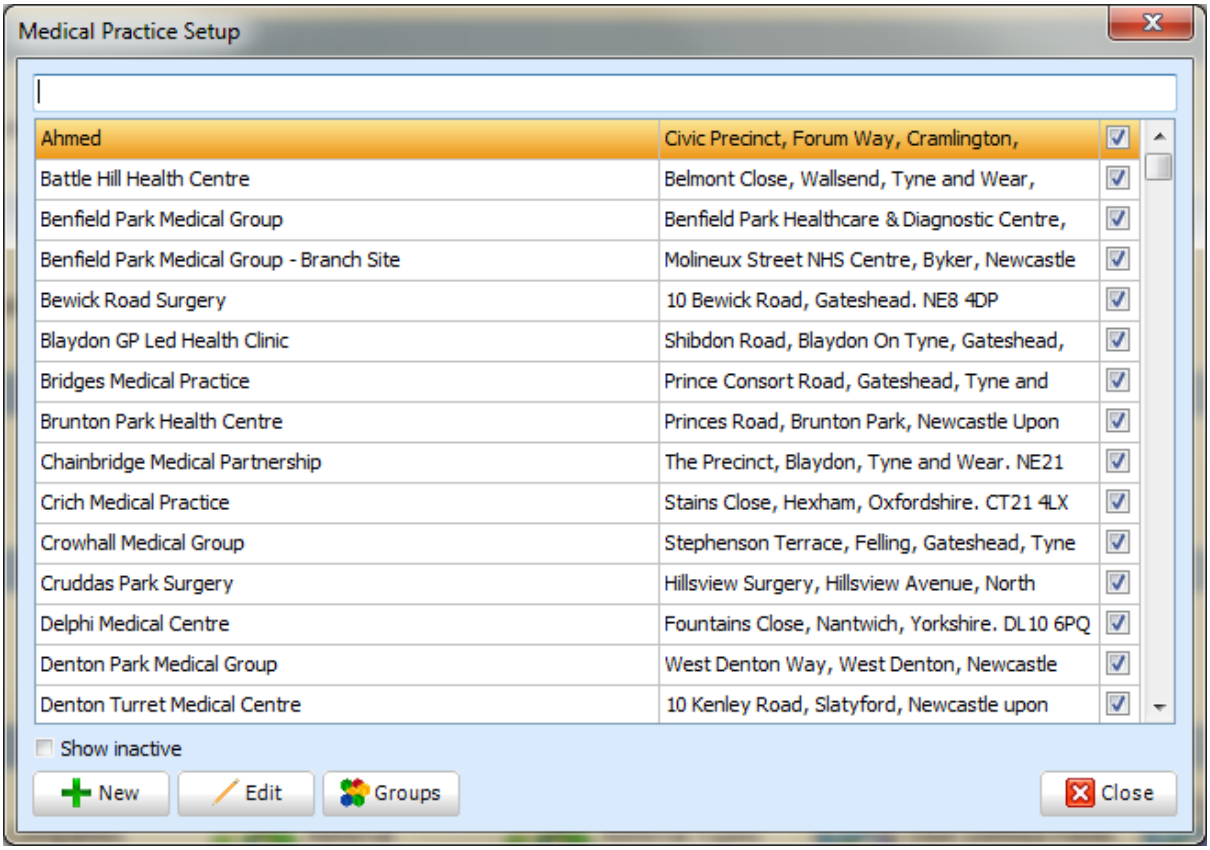


Within the **Name** textbox type in the name of the condition you would like to see in the medical assessment screen. The last thing you can setup in this window is the type of **Warning** which would appear if the patient ticked this condition. The drop down list will give you four options, **None**, **Flag**, **Text** and **Message**. Select the warning you wish to appear when you select that patient.
To finalise the creation of the condition, click **Save**.

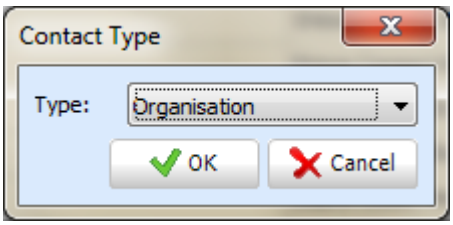
Medical Practices

To access the **Practices** setup, click on the **Tooth icon at the top left** and select **Setup,** from there click on the **Practices** button which is located under the **Medical Bar**.

The Medical Practice Setup window which appears will show you a list of all medical practices currently active in the system, the addresses of these practices is also listed to the right hand. To see any inactive practices click on the **Show Inactive** checkbox.
The filter at the top of the window allows you to easily navigate to the practice which you want by either typing in the full or partial name of the practice.
To add a new practice or change an existing one, click on the **New** or **Edit** options.

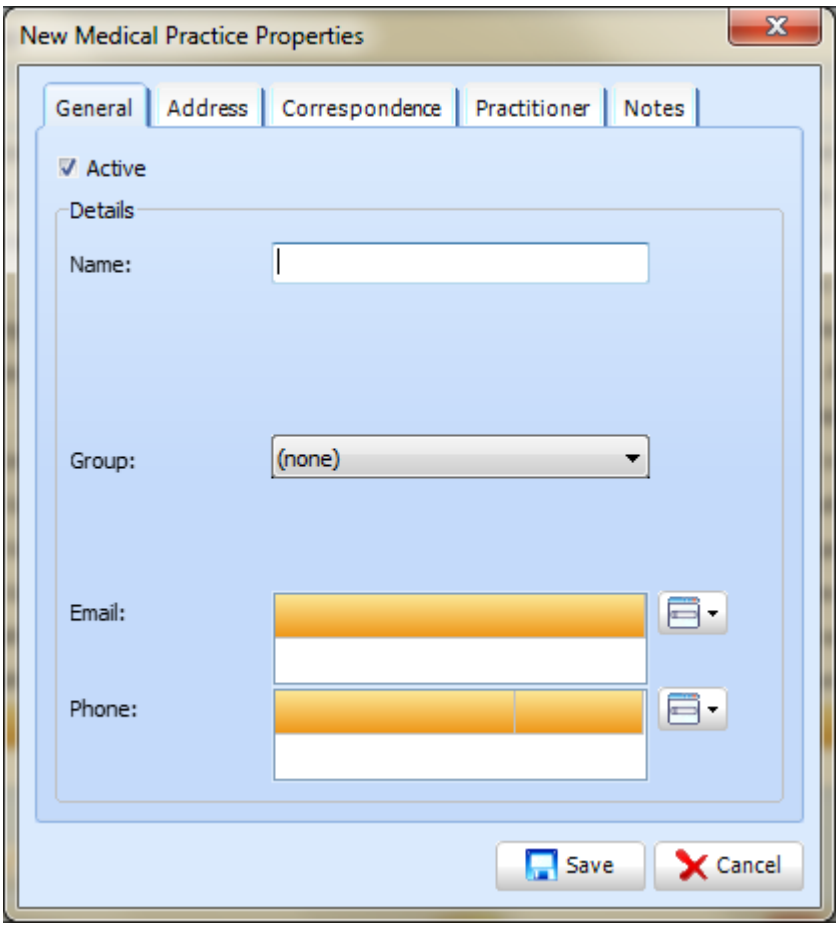


Once you click on New you will have the option to choose from Organisation or Person via the drop down list. Click the **OK** button once you have chosen.

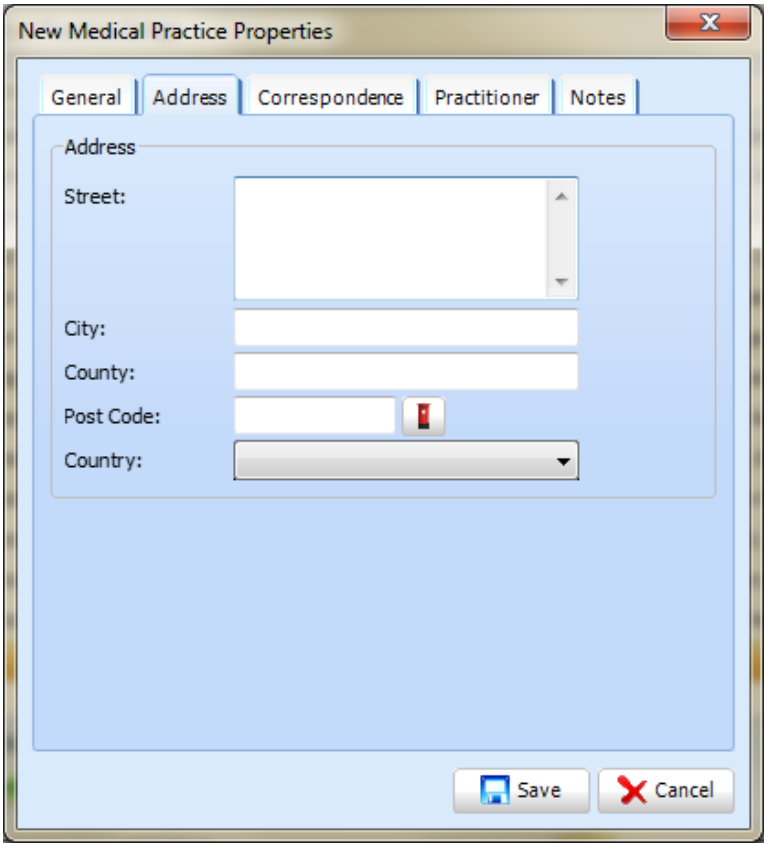


The **New Medical Practice Properties** window will now appear with various tabs. Within the **General** tab you are able to mark your medical practice as active and inactive. Next is to enter the name of

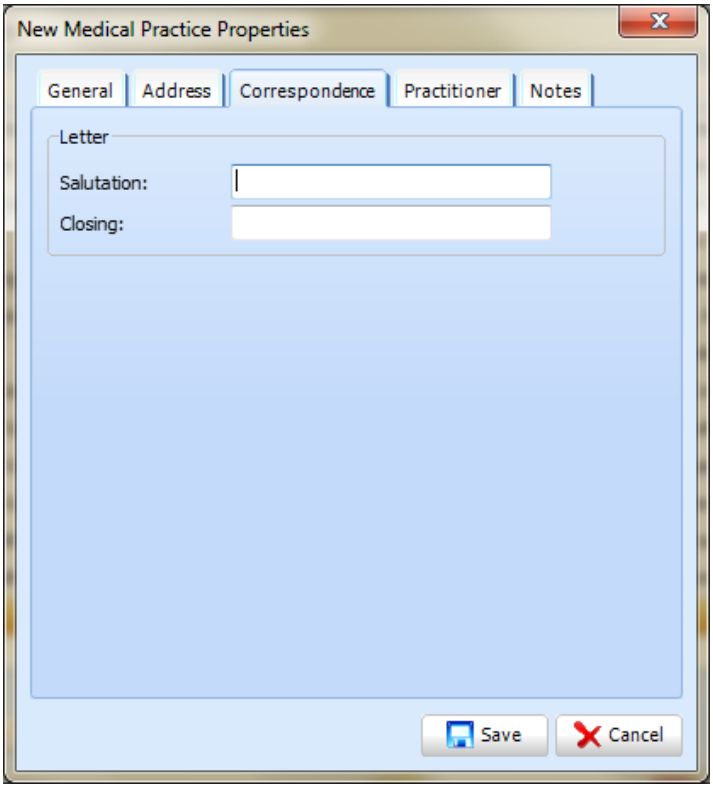
the practice. You then have the option to assign this practice to a group by clicking on the drop down list. Finally you can enter the Email and phone number details by clicking on the drop down buttons to the right hand side of email and phone and select **New**.



The next tab is **Address**. This tab allows you to add all the address details including the street, city, county, postcode and country.



The next tab is **Correspondence**. Within this tab you can enter the salutation and closing sentences in the corresponding textboxes. ***(Refer to documents).***

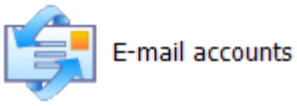


Within the **Practitioners** tab, you can enter any practitioner's details you have for the practice, to set up a new practitioner contact click on the **New** button. Enter all details you wish to then click **Save**. The name of the contact will now appear on the screen.

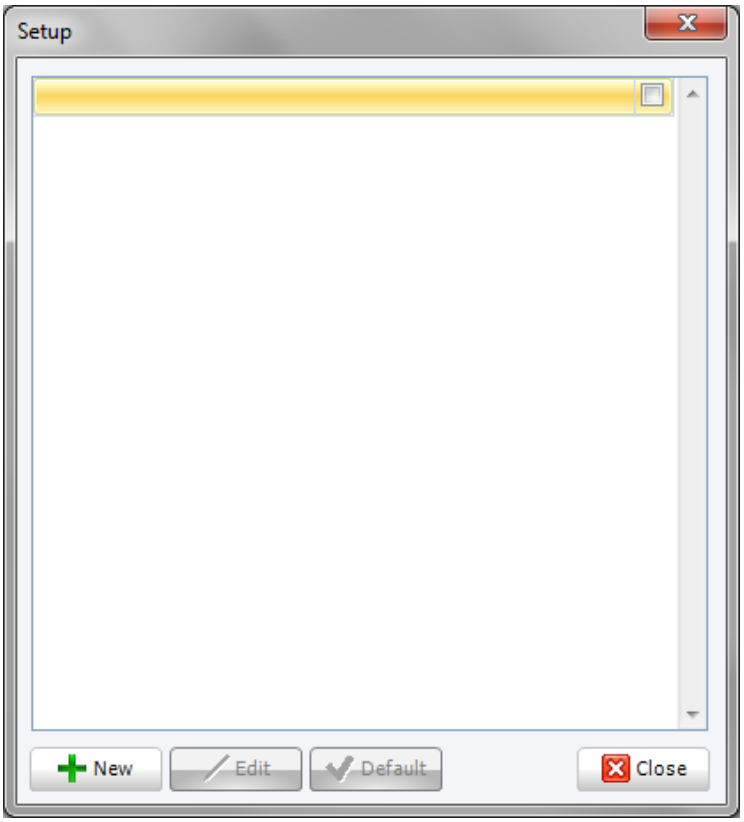
Miscellaneous

Email Accounts

To access the E-mail accounts setup, click on the **Tooth icon at the top left** and select **setup**. Click **E-mail Accounts** which is located under the **Miscellaneous Bar.**

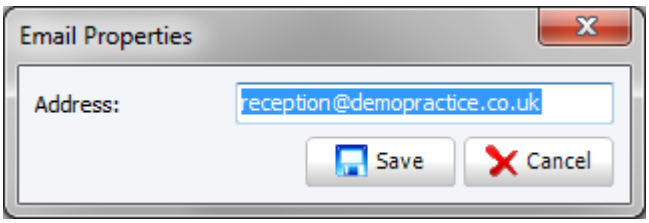


The Setup window will now appear. Click on **New** to create the account. Enter the name of your email account in the name section of properties screen then click **New**.



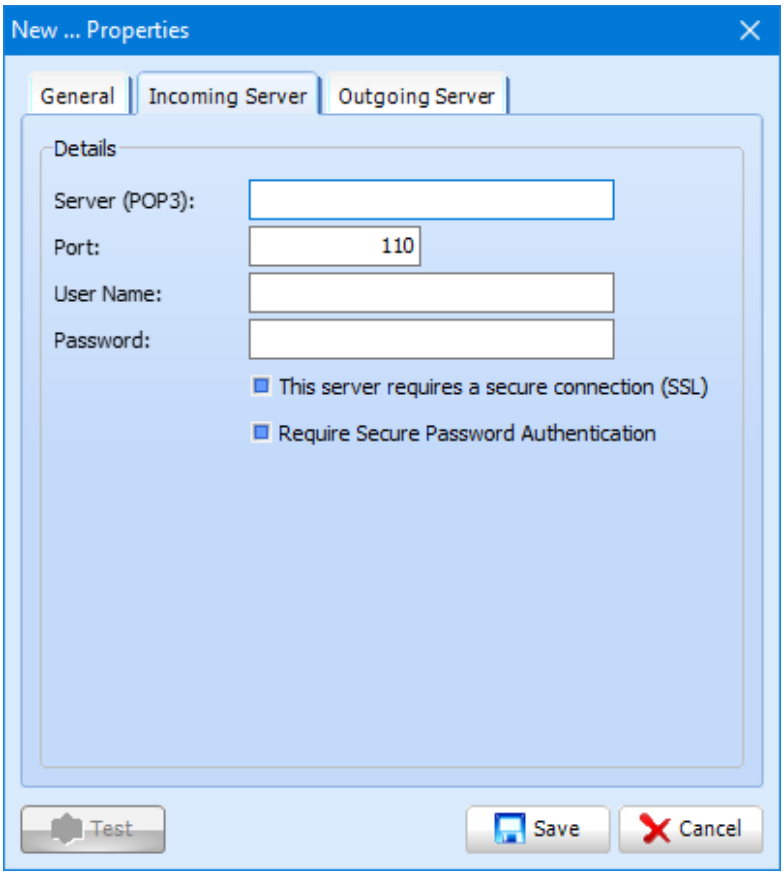
In the **Name** field, enter the sender name you wish to use.

Within the **E-Mail Properties** window enter your email address, then click the **Save** button.

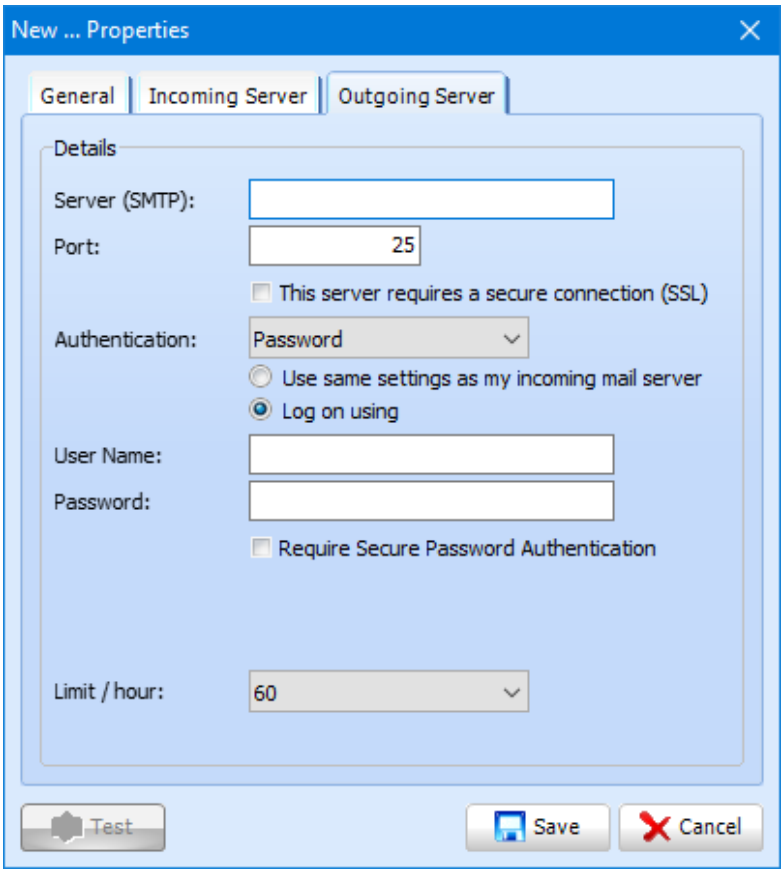


Having entered all of the basic information, the **E-Mail server credentials** must now be entered. These should have been supplied to you by your **ISP** (Internet Service Provider) or Website Hosting Company.

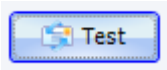
First configure your **POP3** settings



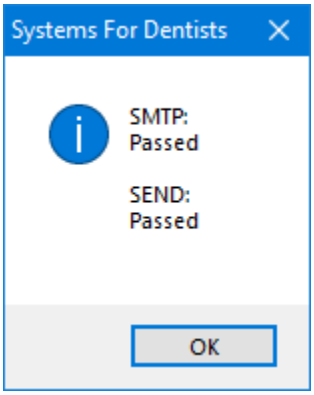
Now configure your **SMTP** settings.



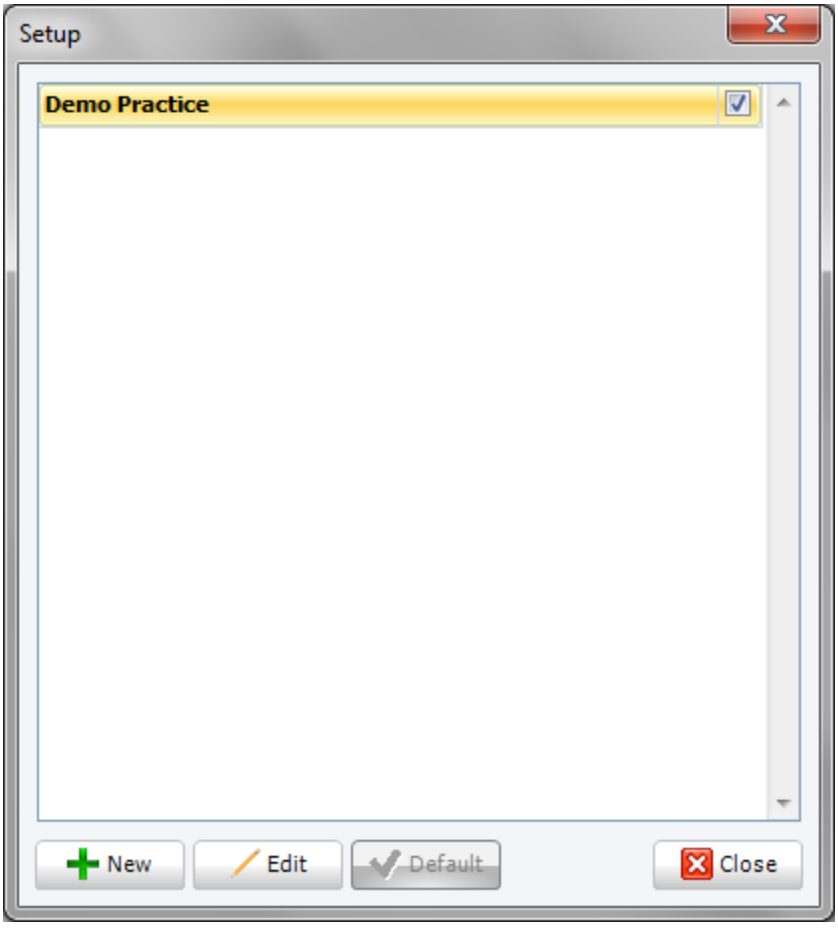
Click the **Test** button to test you configuration.



SFD will try to send a test email using the details you have provided.



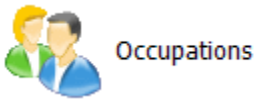
Once you have successfully completed your test, click the **Save button.** Now click on the **Default** button and the E-Mail account you have setup appears bold.



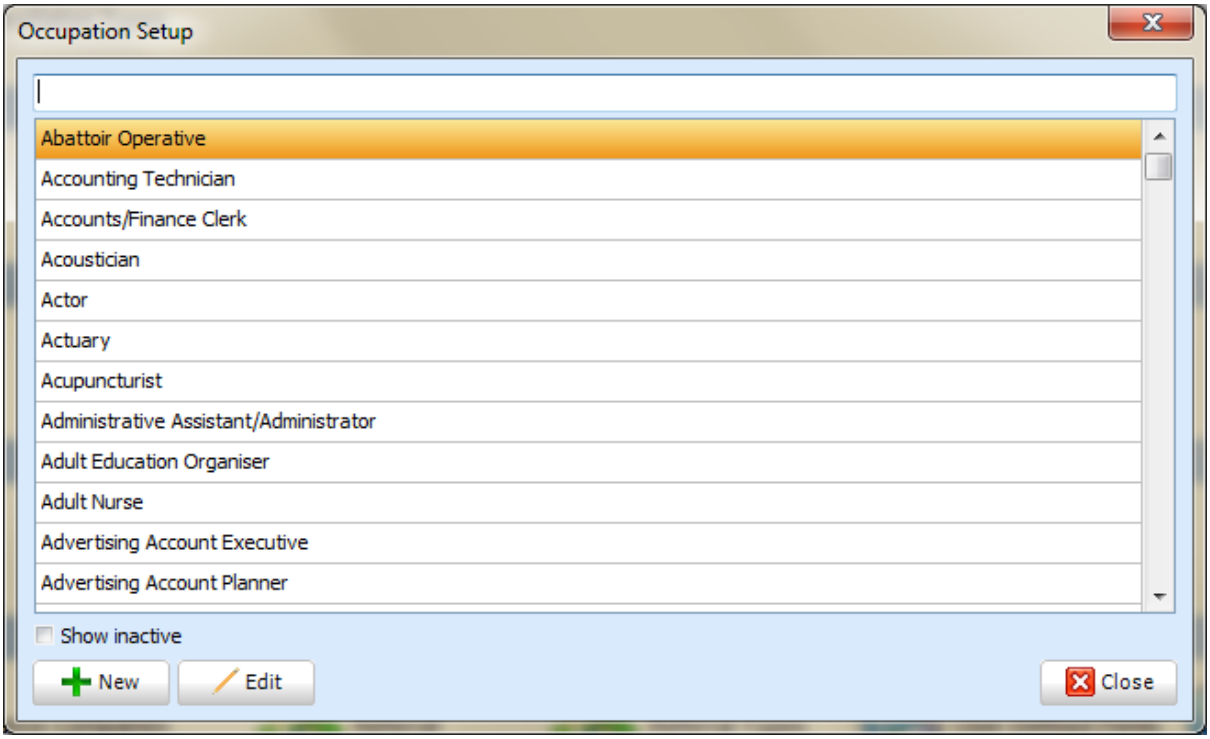
Occupations

Occupations are an optional selection within the patient record; these are selected from a pre-defined list which allows the ability to report on patients with a specific occupation.
This part of the setup allows you to add or edit existing occupations.

To access the occupation setup, click on the **Tooth icon** at the top left and select **Setup**. Click **Occupations** under the **Miscellaneous bar**.



The **Occupation Setup** window show, displaying all active occupations. The filter at the top of this window allows you to easily search for the occupation you want by typing the full or partial name. To edit and existing occupation, highlight the one you want and click on the **Edit** button. To create a new occupation click on the **New** button.

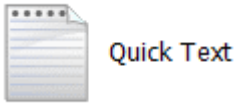


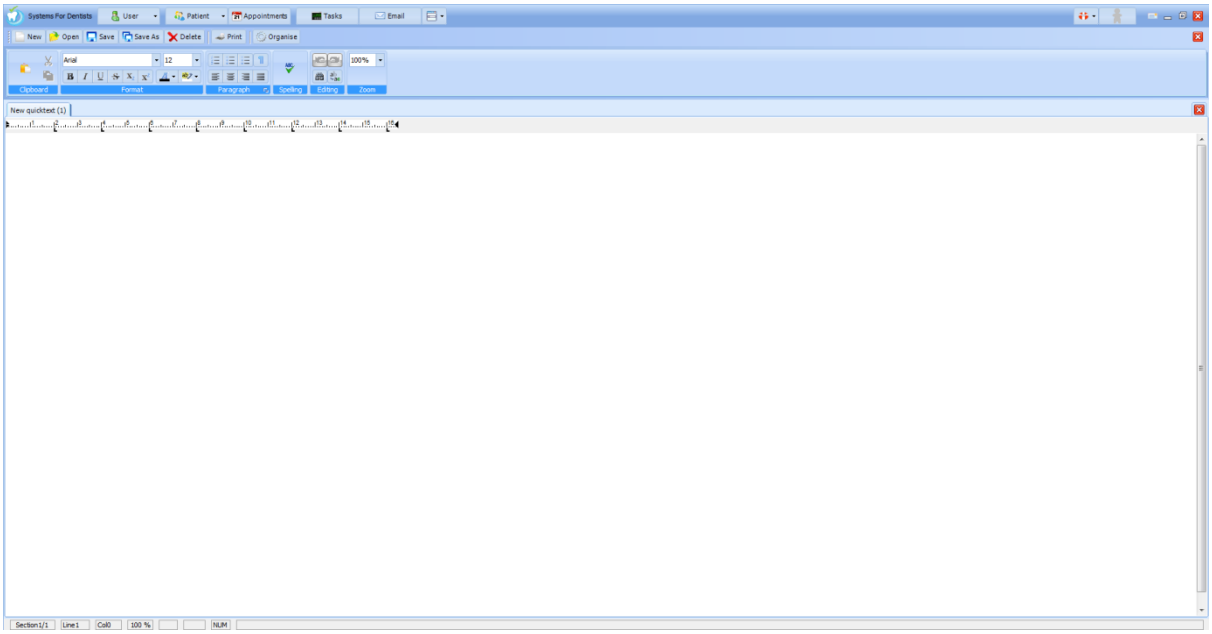
The **New Occupations** window appears. Enter the name of the occupation you wish to create then click **Save**. Your new occupation will now be available within the system.

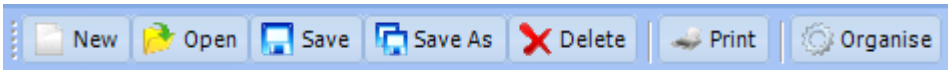
Quick Text

Quick Text allows you to create a copy of a phrase or sentence which you use regularly and copy it directly into the clinical notes of a patient. The Quick Text setup allows you to create/edit/delete and organise your current quick texts.

To access the practice setup, click on the **Tooth icon** in the top left hand corner and select **Setup**. Click on the **Quick Text** button which is located under the **Miscellaneous** bar.







New allows you to create a brand new Quick Text

Open allows you to open any existing quick texts.

The **Save** button allows you to save any changes that you have made to a quick text.

Saves As does the same as save but allows you to choose the location you are saving the document to. After clicking the **Save As** button you will be presented with the **Save Template** window.

Within the same window you also have ability to create sub folders. This becomes very useful when you have many quick texts within the system, and you need a quick and easy way of keeping track of them.
To create a sub folder click on the **New sub folder** button where you can add the name of the subfolder.

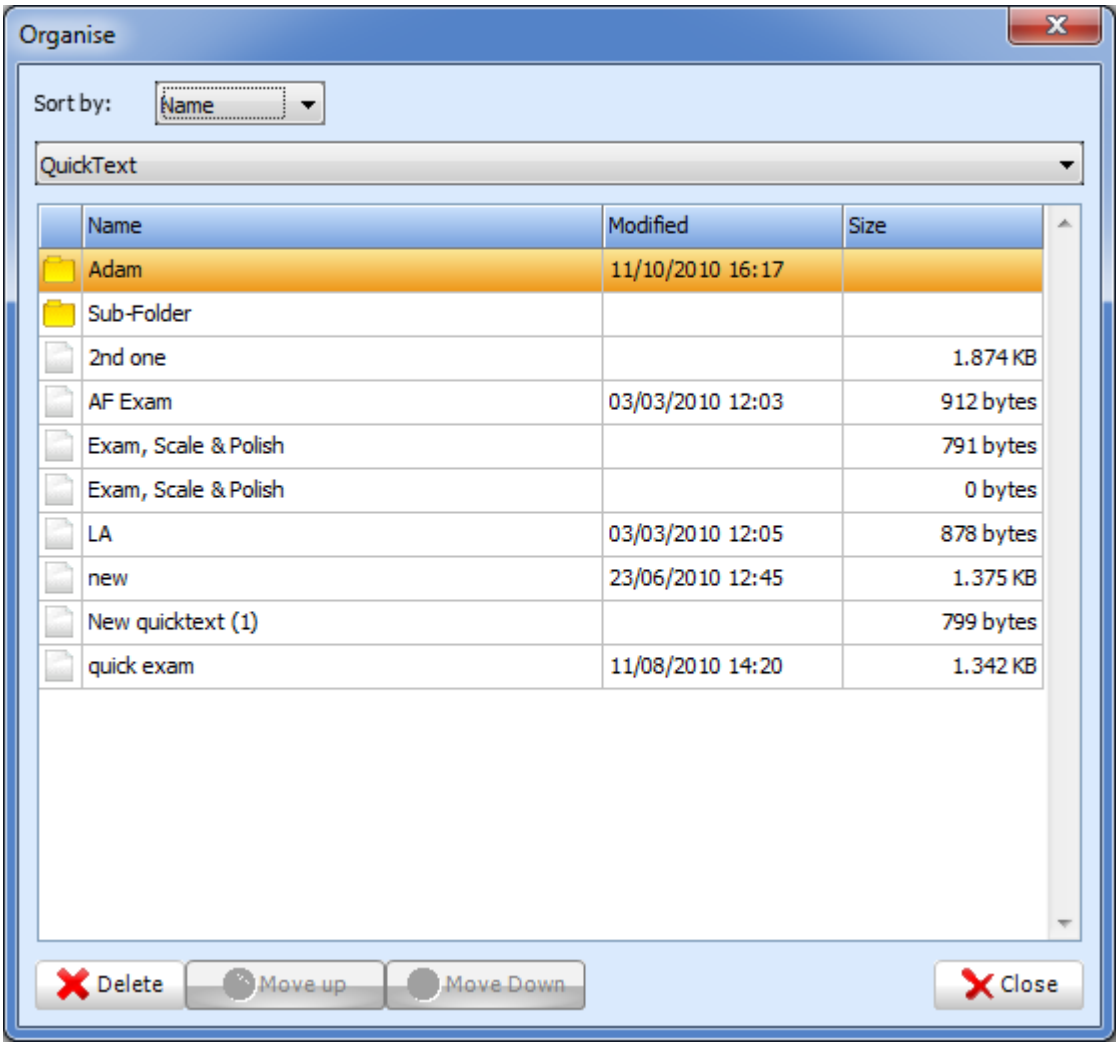
Click **OK** to create the folder.

The **Delete** button removes the quick text that you have open.

The next button is **Print**. This gives you the facility to print the current quick text you have open.

The last button along is the **Organise** button, this feature allows you to organise your quick texts in a way that suits you.

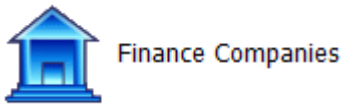
Once you click on the **Organise** button the below window appears.



As you can see there are two buttons at the bottom which are disabled at present because within the Sort drop down box, **Name** is selected, this will list all the quick texts in an alphabetic order, to arrange them in a way that you want, click on the same drop down button and choose **Order**, this will then activate the **Move Up** and **Move Down** buttons, which allows you to highlight quick texts and rearrange them within the window.

Finance Companies

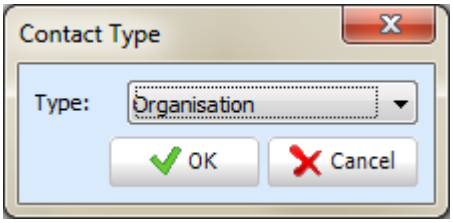
To access the finance companies setup, click on the **Tooth icon** at the top left and select **Setup**. Click on the **Finance Company** button which is located under the **Miscellaneous bar**.



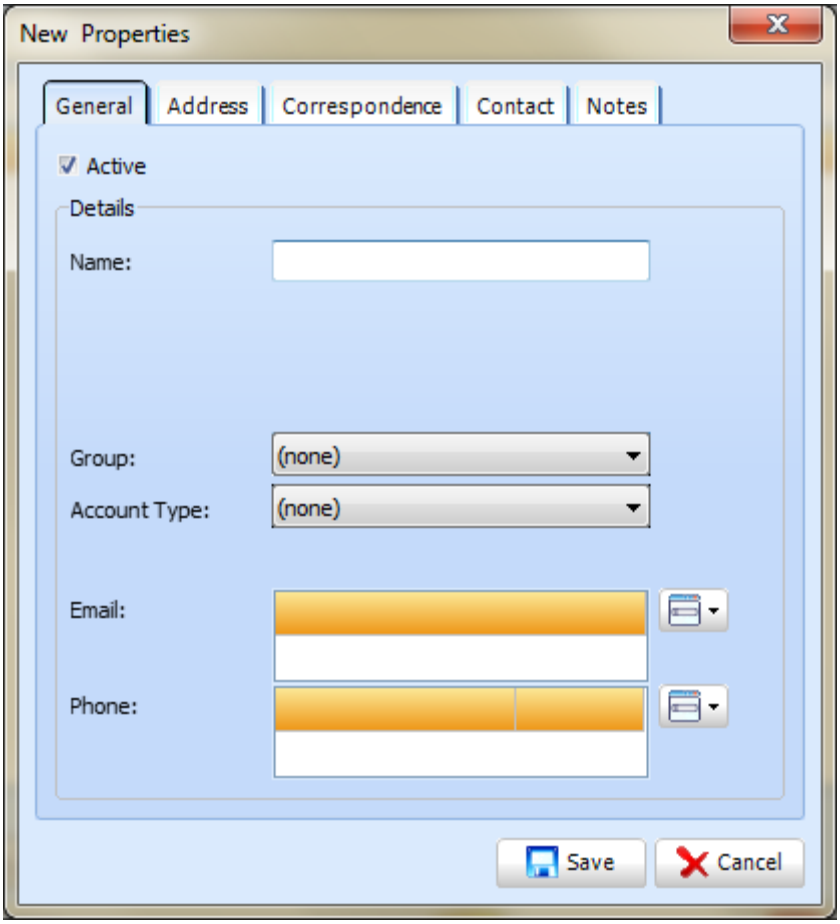
The **Setup** window will now appear showing you a list of currently active finance companies on the system. To see any inactive companies click on the **Show Inactive** checkbox to the bottom left hand side of the window. The filter at the top of the window allows you to easily navigate to the contact you would like to possibly edit by either typing in the partial or full name of the contact.

To edit an existing finance company, highlight the one you want and click on the **Edit** button, to add a new finance company, click on the **New** button to the bottom left of the window.

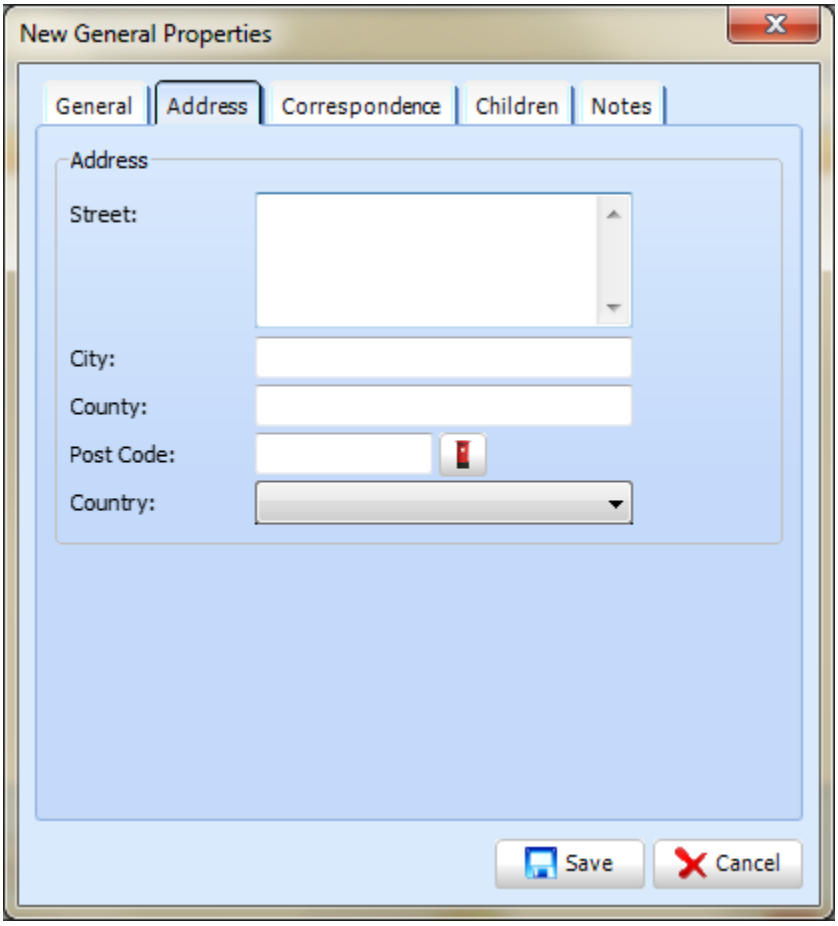
When creating a new finance company the **Contact Type** window appears. Here you can choose the Finance company type you would like to create. You have the choice between either organisation and person. Click on the type you want from the dropdown list and click on the **OK** button.



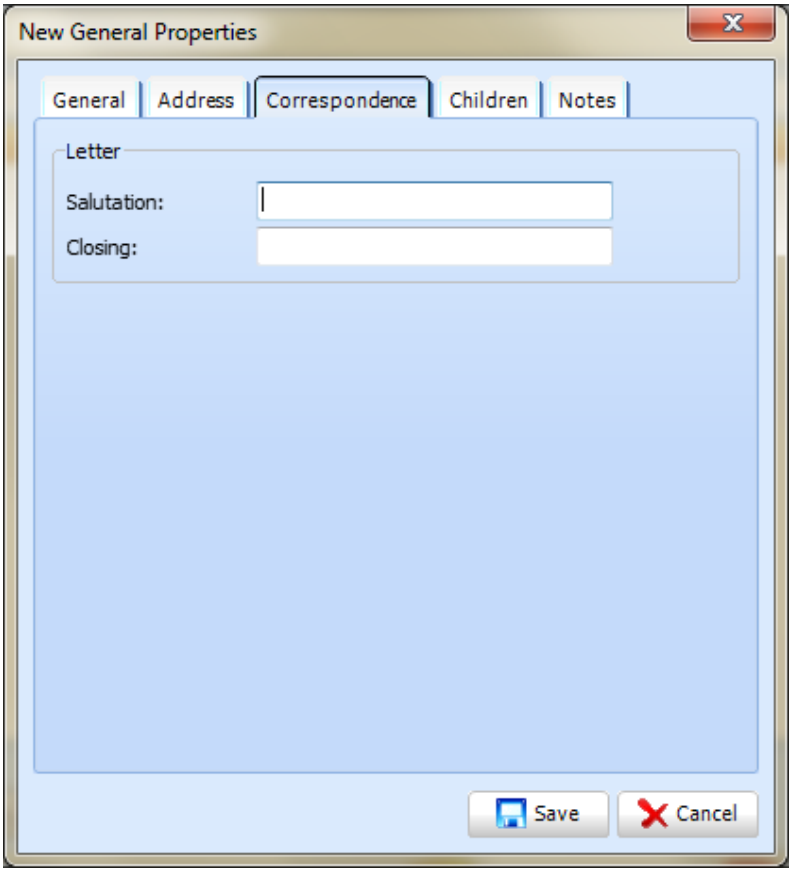
The **New Properties** window appears. This window is the setup for the Organisation type. You will notice if you if you picked the other type of contact, there will be less tabs and less fields to fill in. The first tab will be **General**, where you can enter the name of the organisations, account type, referral type and the contact details of said organisation. You also have the ability to put the Finance company into a group.



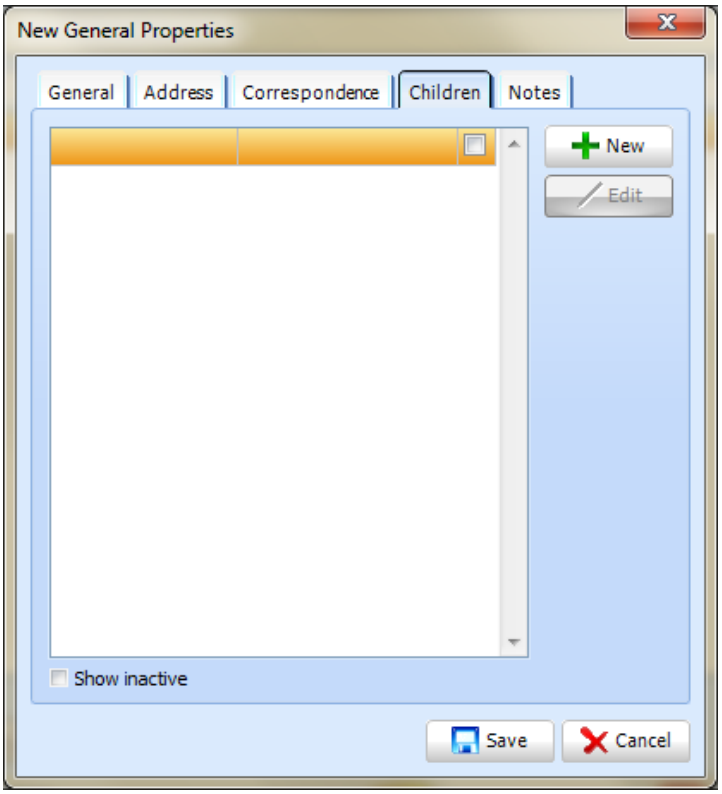
The next tab is **Address**; enter the address details of the contact into the corresponding textboxes.



Within the **Correspondence** tab, enter the salutation and closing sentences in the corresponding textboxes**.**



Next is the **Contacts** tab where a contact for the finance company can be entered. Click **New** to start entering the contact details.

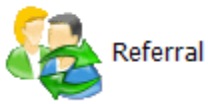


The final step in the setup is to enter any notes you would like to save regarding the organisation which is located in the **Notes** tab.

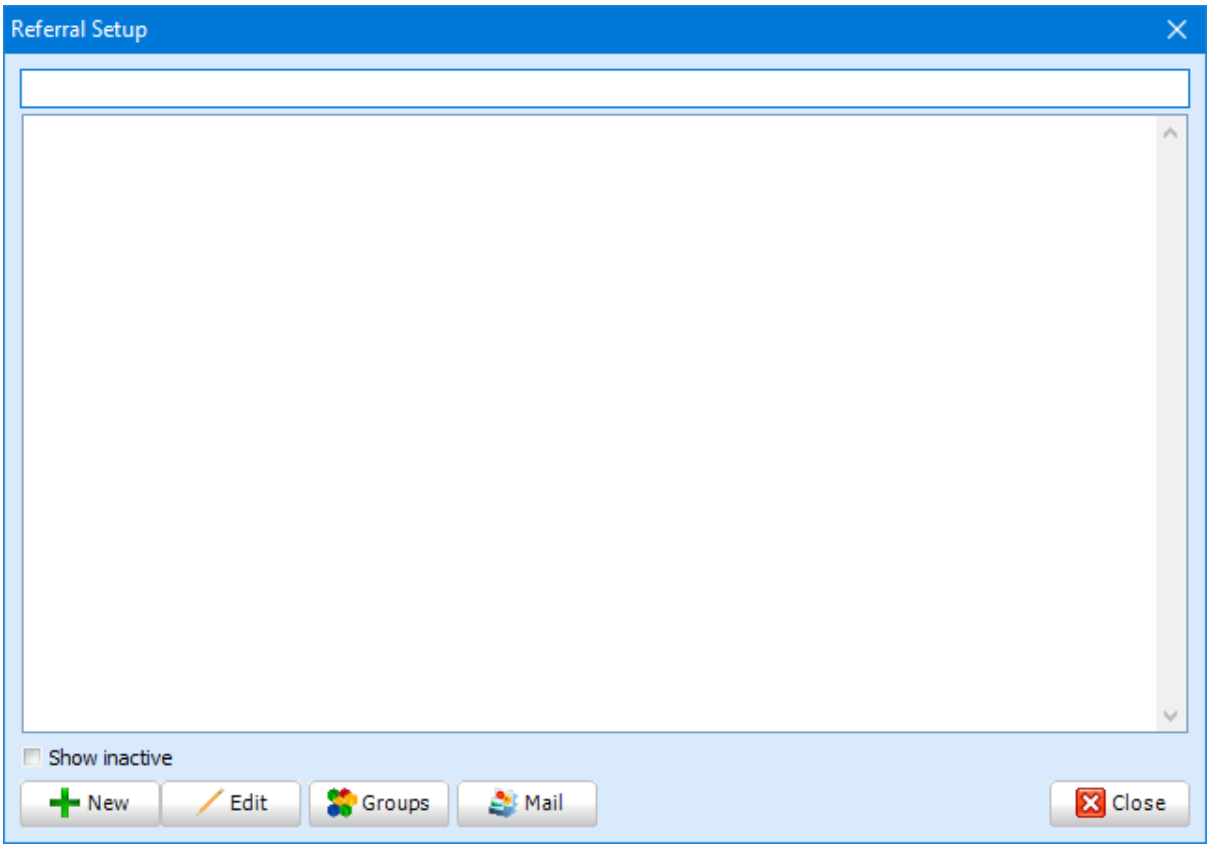
Click **Save** to save your changes.

Referral

To access the Referral Setup click on the **Tooth icon** at the top left and select **Setup**. Then click the **Referral** button which is located under the **Miscellaneous Bar**.

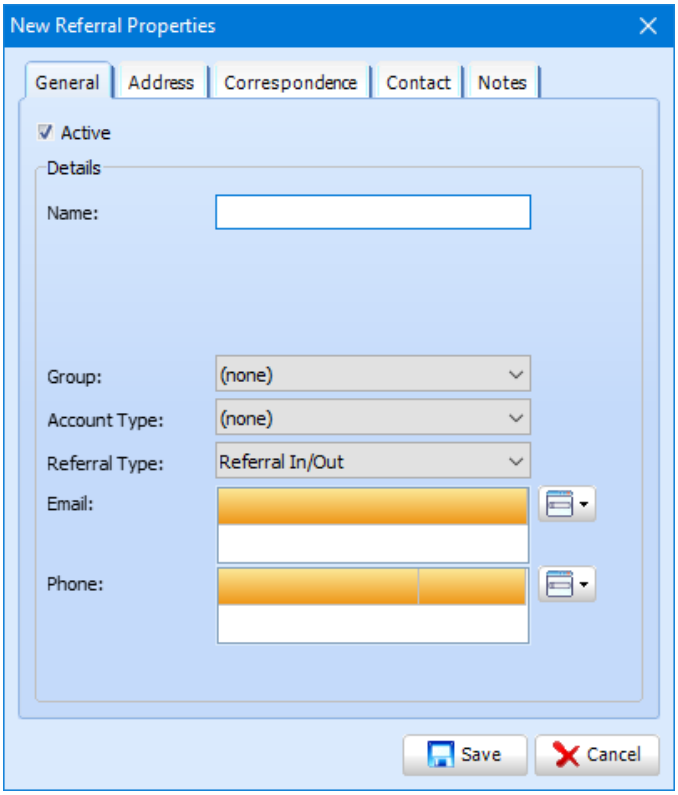


The **Referral Setup** window will now appear. Within this window is a list of all your currently active referrals. To see any inactive ones click on the Show **Inactive checkbox** in the bottom left hand side of the window. The filter at the top of the window allows you to easily find the referral you are looking for by entering the full/partial name of the referral.
To edit an existing referral, highlight the one you want and click on the **Edit** button. To create a new referral, click on the **New** button.



When creating a new referral, the **Contact Type** window is displayed where you can choose the contact type you would like to create. You then have the choice between either organisation or person. Click on the type you want from the dropdown list and click the **OK** button.

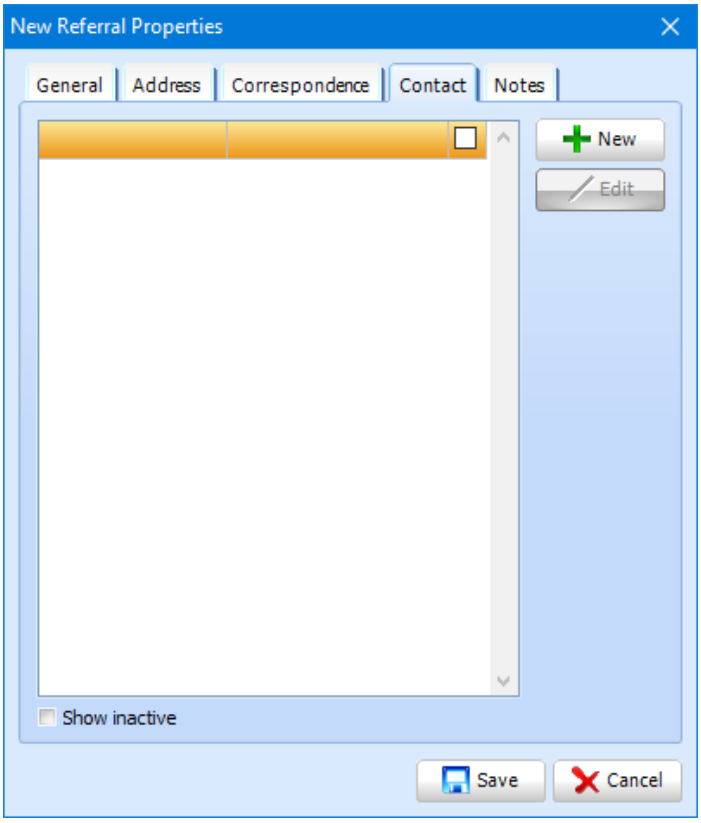
The **New Referral Properties** window will show. This window is the setup for the Organisation type. The first tab will be **General**. In here you will be able to enter the name of the referral, account type, referral type and the contact details of the referral. You also have the ability to put the referral into a group.



The next tab is **Address**. Enter the address details of the organisation into the corresponding textboxes.

Within the **Correspondence** tab you can enter the salutation and closing sentences in the corresponding textboxes.

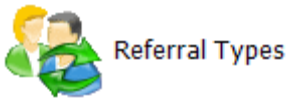
The next part of the setup is the **Contacts** tab. Within this tab you will be able to enter new contacts within the organisation you are setting up, click on the **New** button to start entering the new contacts details.



The final step in the setup is to enter any notes you would like to save regarding the organisation, this is done within the final tab named **Notes**.

Referral Types

To access the Referral Type setup, click on the **Tooth icon at the top left** then select **Setup**. From there click on the Referral Types button, which is located under the **Miscellaneous** bar.



The **Setup** window will now appear. Within this window is a list of all the current active Referral types in the system. To see any inactive types click on the **Show Inactive** checkbox in the bottom left hand side of the screen.

To edit an existing referral type, highlight the one you want and click on the **Edit** button. To create a new **Referral type** click on the **New** button.

The **New Referral Type Group Properties** window will now appear. Within this window, enter the name of the referral type. Once that is done, click **Save**.

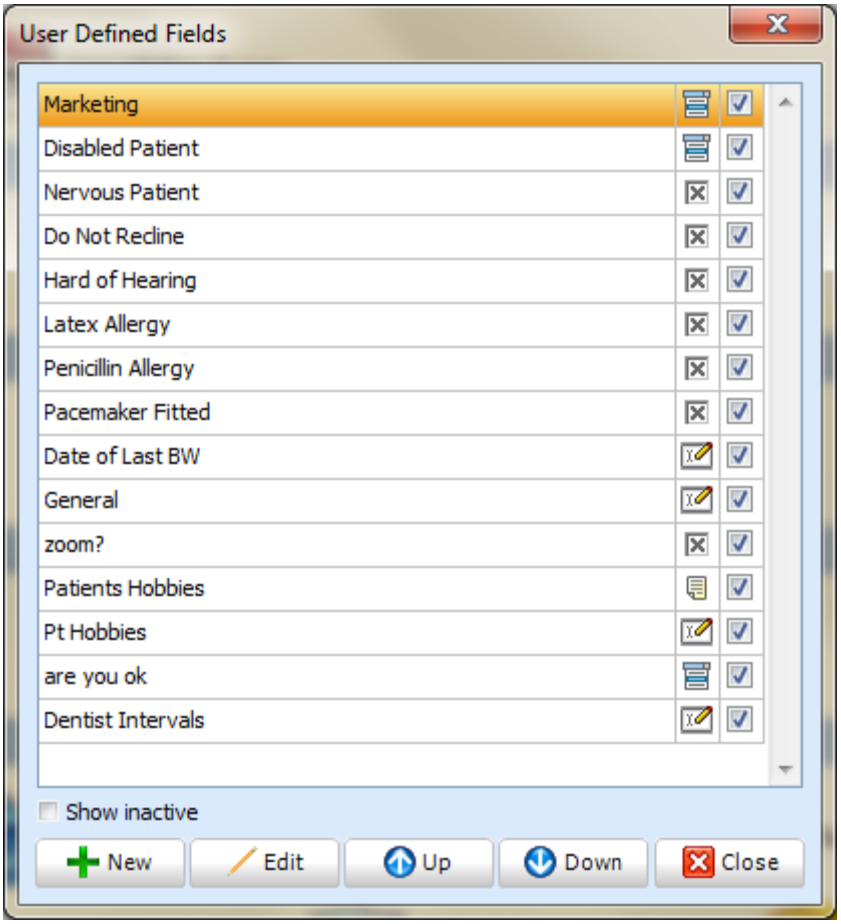
User Defined Fields

User Defined Fields (UDFs) allow you to create unique fields which are present on every patient record.

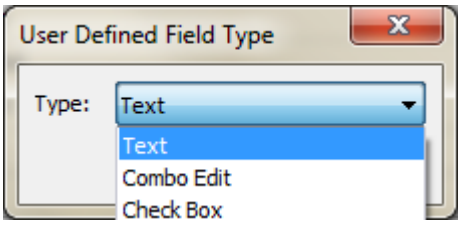
To access the User Defined Fields setup, click on the **Tooth icon** in the top left then click on **Setup**. Click on the **User Defined Fields** Setup button, which will be located near the bottom of the screen under the **Miscellaneous** bar.

The **User Defined Fields** window appears listing all the currently active UDF's in the system. To view any inactive UDF's, click **Show Inactive**.

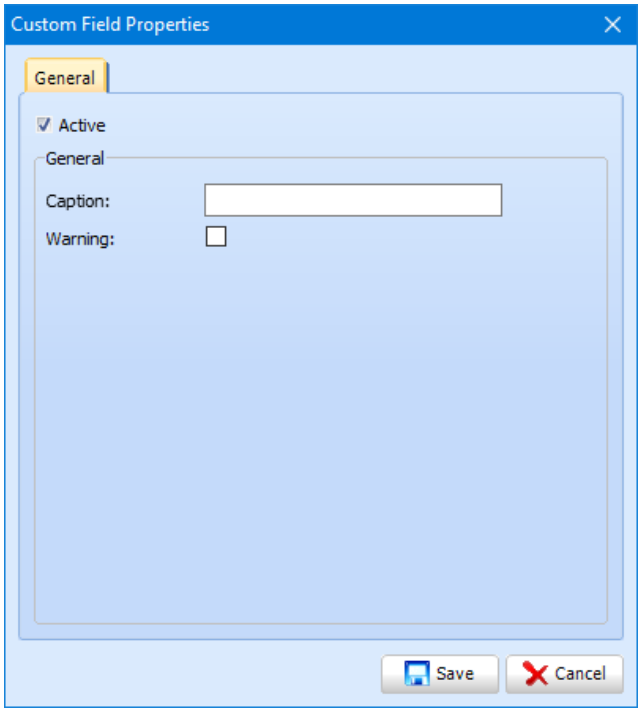
To rearrange the order of the fields you can highlight one and click on either the **Up** or **Down** arrows to change where they appear in the patient's properties. The icons indicate what kind of UDF it is, a checkbox, dropdown bar or a textbox the user can enter information into.
To add a new question or change an existing one, click on the **New** or **Edit** buttons



This window allows you to choose a UDF type. There will be four options available which are **text**, **checkbox**, **memo** and **combo edit**. Click on the UDF option you wish to create then click **OK**.



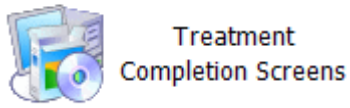
The **User Defined Field Properties** window will now appear. The window might differ slightly, depending on the UDF type. Enter the UDF name in the window shown on your screen.



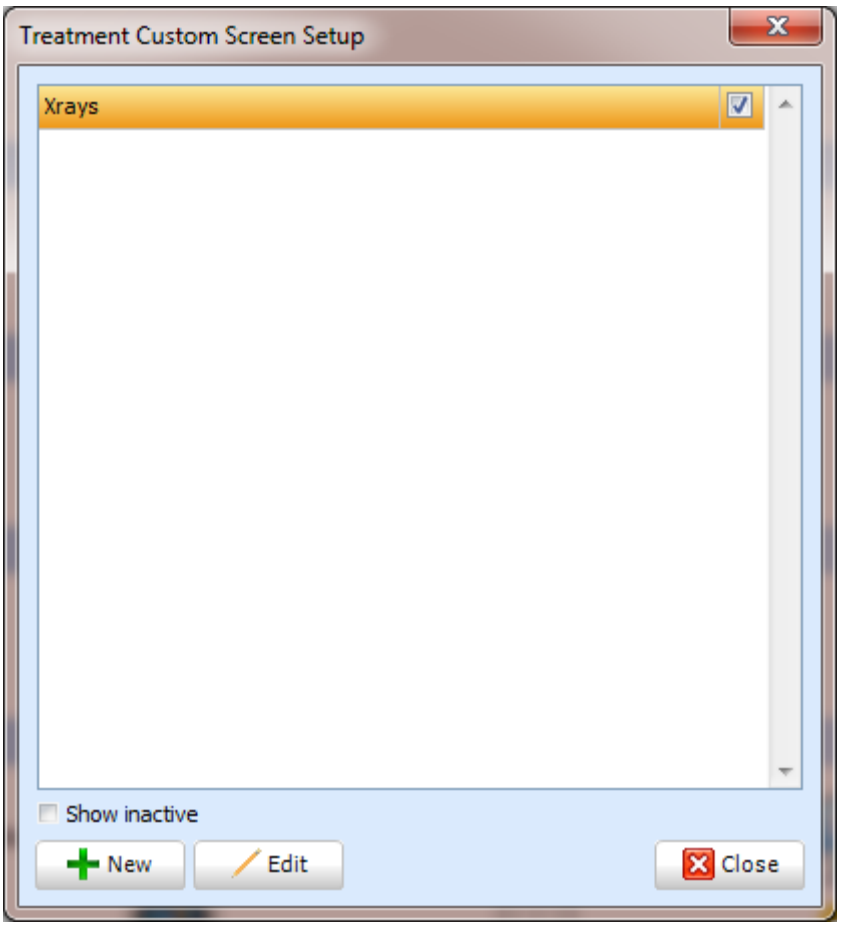
Your new User Defined Field has been setup.

Treatment Completion Screen

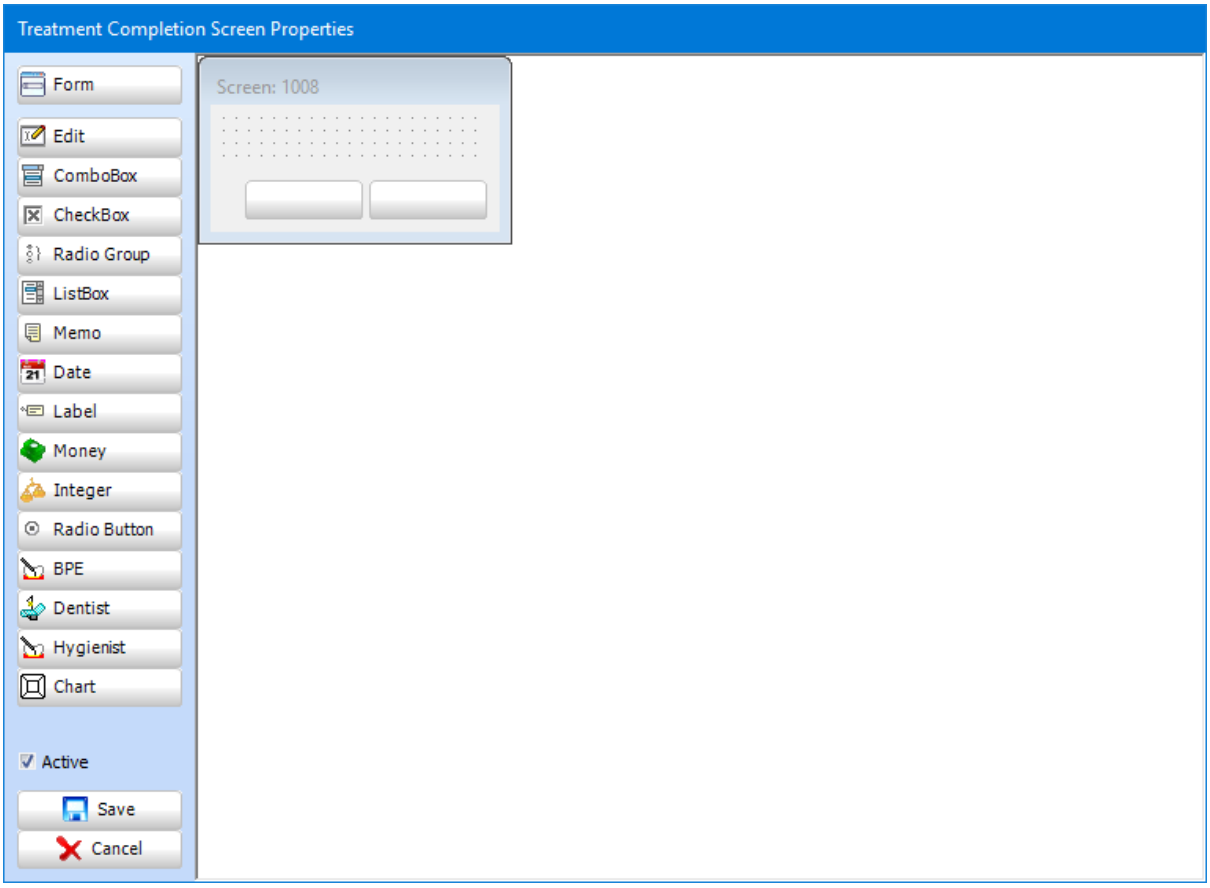
To access the Treatment Completion screen click on the **Tooth icon** at the top left and select **Setup**. Click on the **Treatment Completion Screen** button, which is located under the **Miscellaneous** bar.



This will show a list of the Treatment Completion Screens (TCS) you have already created. To create a new TCS, click on the **New** button in the bottom left of the window.

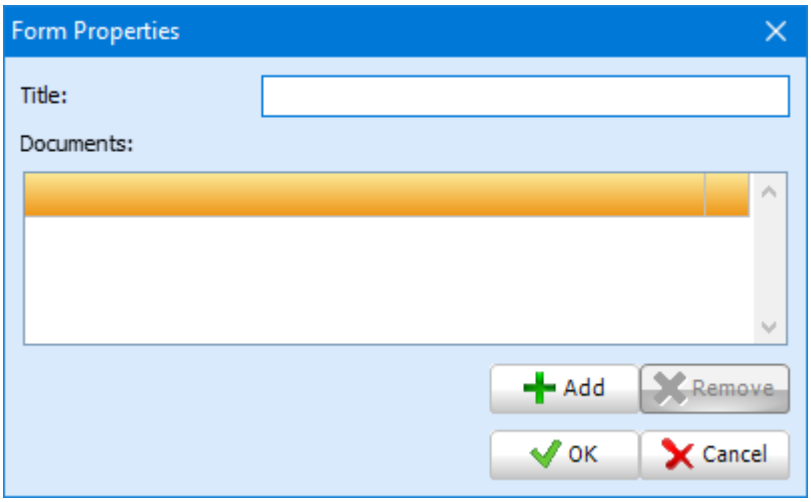


The **Treatment Completion Screen Properties** window appears.



This window allows you to name your TCS and add a range of controls. In the left panel of this window there is a list of the controls you can add to the TCS.

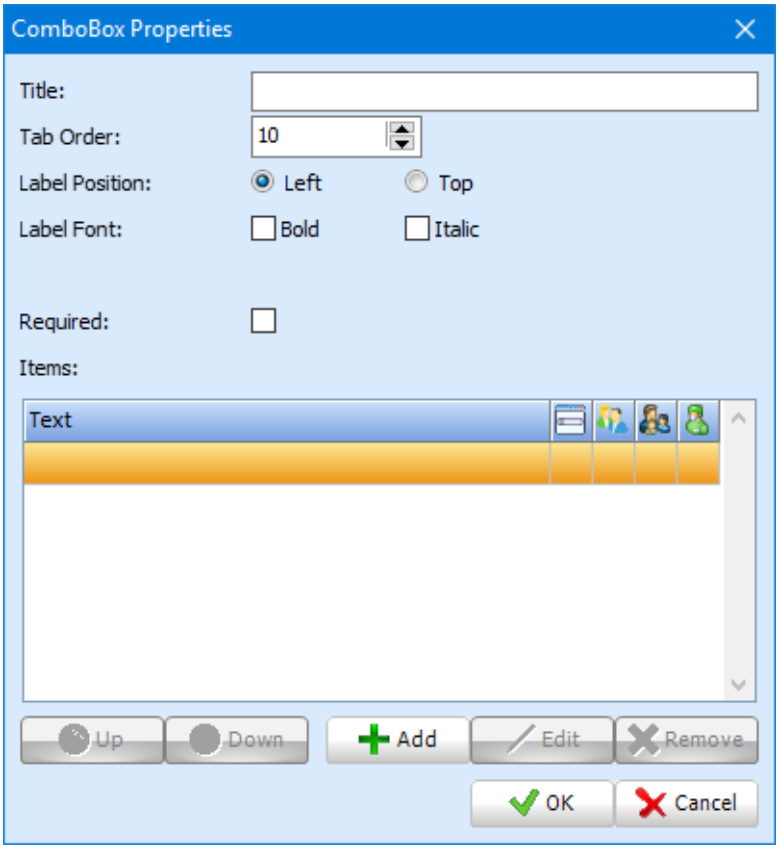
The first step is to name your TCS. To do this, click on the **Form** button. The **Form Properties** window below appears.



In this example LA Used has been added as the title for the TCS. Once you have entered the title, click on the **OK** button.

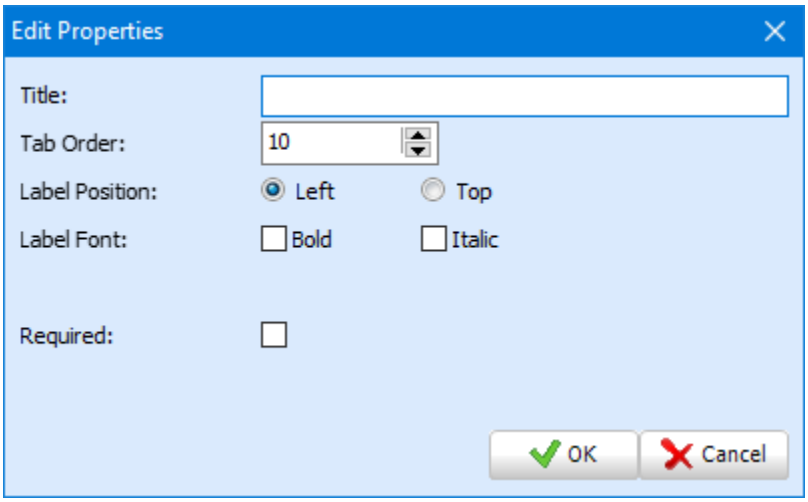
You can change the size of the TCS by dragging the corner at the bottom right to the desired size.

To add a ComboBox for example, select the option and position the ComboBox to the desired location on the form. Double click this to open the options where a **Title**, **Label Position** and **Items** (options) can be specified.



Within this window the label position, tab order and label formatting options can be chosen. Click **OK** to confirm your changes.

An **Edit** box allows the user to enter text without any restrictions. Click **Edit** from the menu on the left then position this to the desired location. Double click this to open settings where a **Title**, **Label Position** and **Label Font** can be specified.



A **CheckBox** allows the user to tick an option. Click **Checkbox** from the menu on the left then position this to the desired location. Double click this to open settings and set the **Title**.

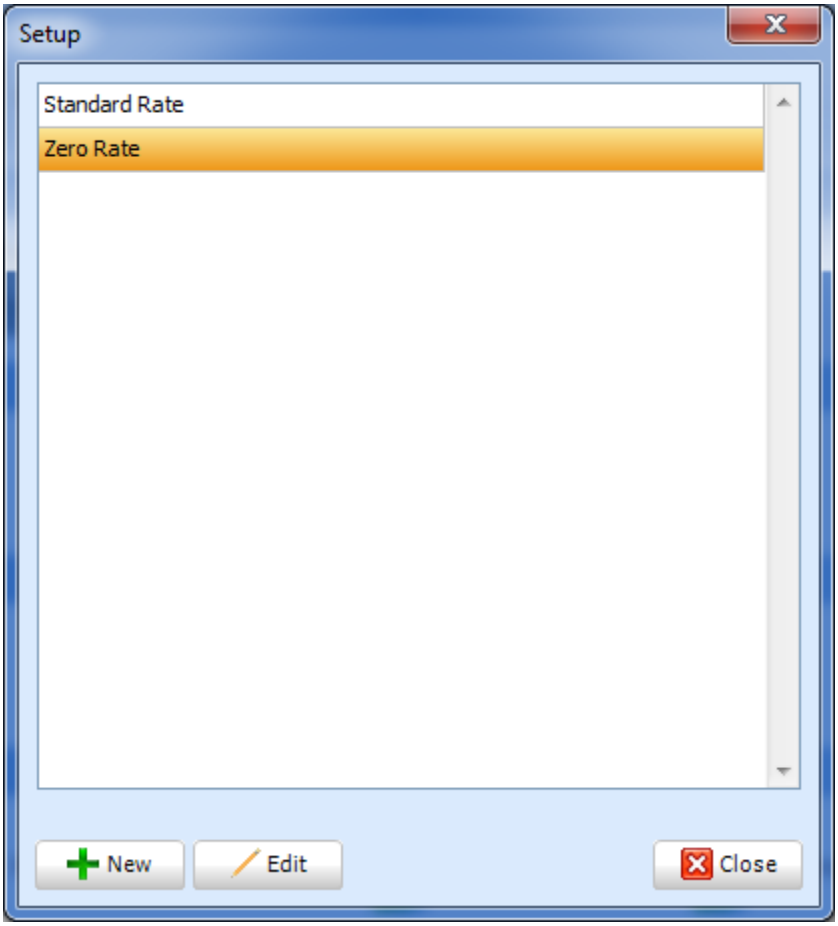
Click **Save** to confirm your TCS.

You can have a TCS appear when an item has been completed. To do this select **Items** from **Setup**. Double click the item and under **Custom Screen**, select your TCS.

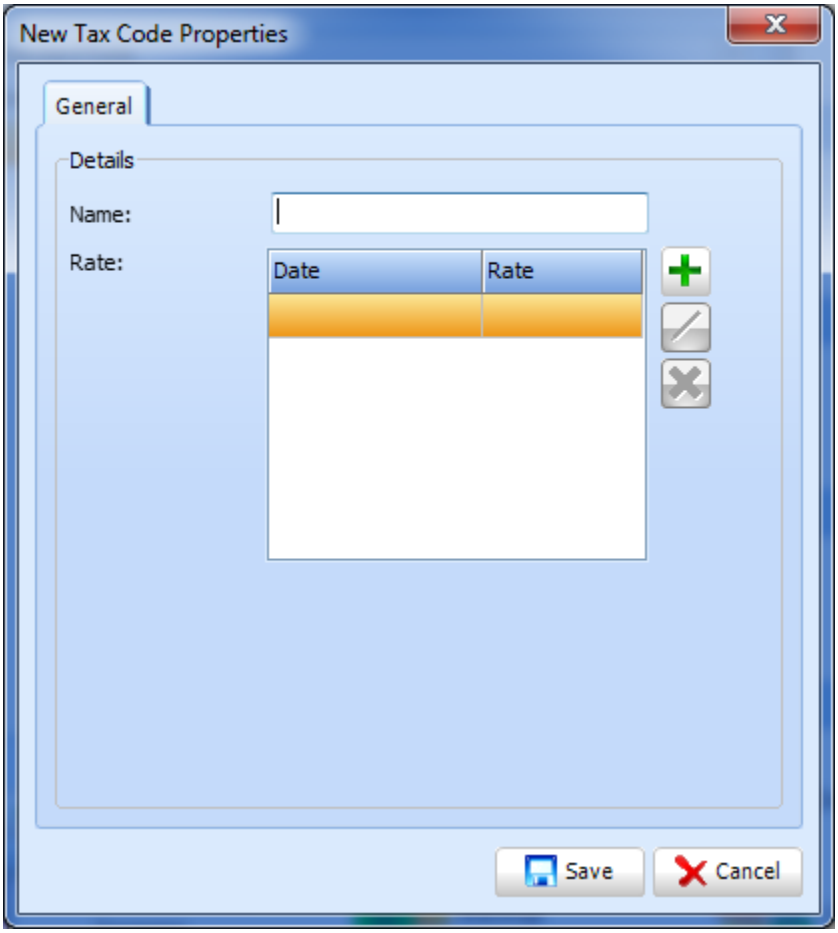
Tax Codes

To access the **Tax Codes** setup, click on the **Tooth icon** in the top left hand corner and select **Setup**. Click on the **Tax Codes** button, which is located under the **Miscellaneous** bar.

The **Setup** window will now display.



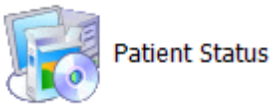
To edit an existing tax rate, highlight the rate and click **Edit.** To create a new option, click **New**.



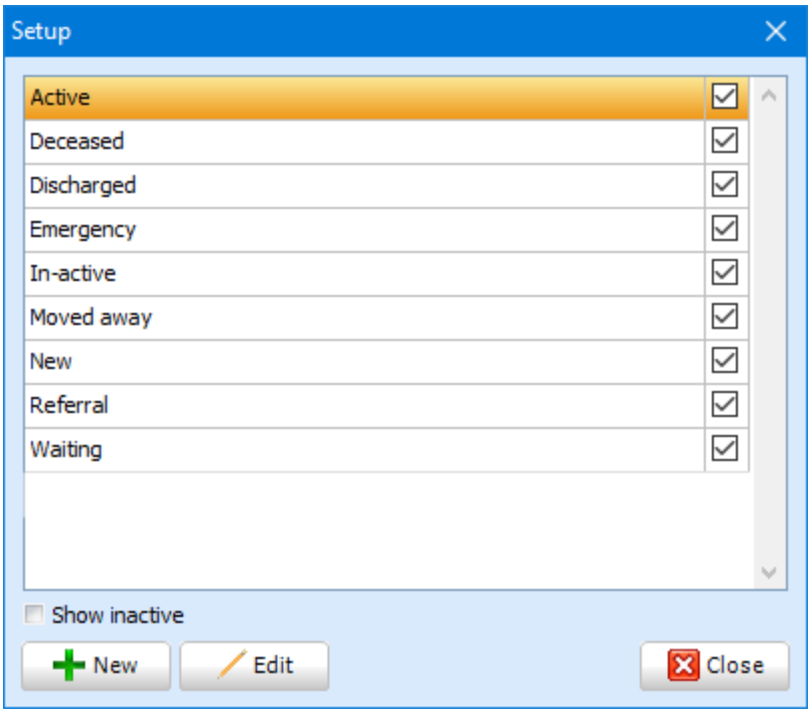
The **New Tax Code Properties** window will now display. Enter a tax code name then select the plus icon to add a new percentage and start date.

Patient Status

To access the patient status setup, click on the **Tooth icon at the top left** and enter **setup**. Select the **Patient Status** button, which is located under the **Miscellaneous Bar**.



The **Setup** window will now appear. This window will list all the current active options you have, which you can use within a patients properties. To edit any existing options, highlight the one you want and click on the **Edit** button. To create a new option click on the **New** button.



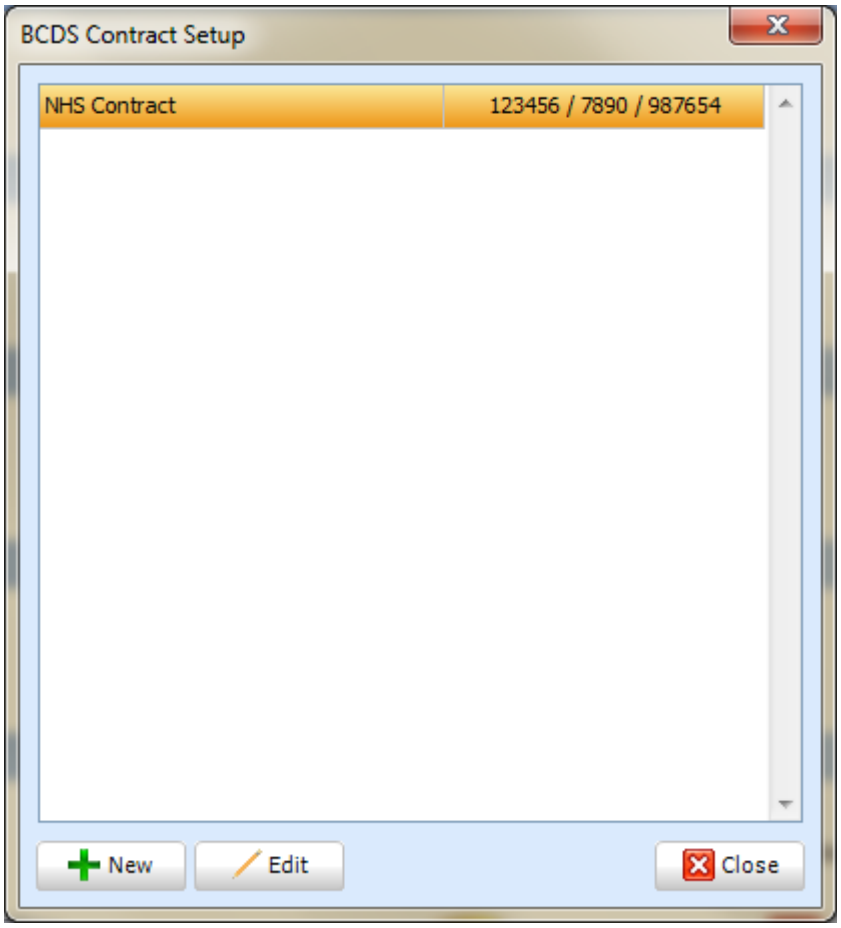
The **New Patient Status Properties** window will now display. Within this window enter the name of the status. Within the drop down list click on the type of status you wish to create, this will be either Active or Inactive. Click **Save** to confirm your changes.

BCDS

NHS England and Welsh practices only

BCDS setup allows you to create and manage NHS contracts for use within SFD. **This does not make any changes to your NHS contract. It will only set it up in SFD.** Click the tooth icon at the top left and select **Setup**. Select the **NHS BCDS** button, which is located under the **Miscellaneous Bar**.

The **BCDS Contract Setup** window will now be displayed. Click **New** to add a contract to SFD or **Edit** to modify an existing contract.

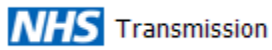


When clicking **New**, the **New BCDS Contract Properties** window will appear, within the **General** tab the **Start** and **End Dates** can be entered as well as the **Provider**, **Tag** and location information.

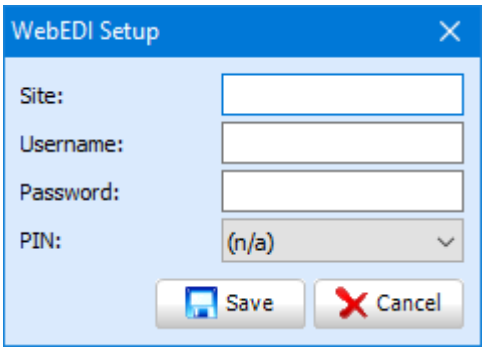
The next tab is **Members**. Performers can be added here by selecting the **Add** button. Their **Start** and **End Dates** can be entered as well as their **Performer Number** and **PIN**.

Transmissions

To access the NHS transmissions setup, click on the **Tooth icon** at the top left, then select **Setup**. Then select the **NHS Transmission** button, which is located under the **Miscellaneous** bar.



The **WebEDI Setup** window will now appear. Within this window enter the **Site**, **Username**, **Password** and **Pin**. Click **Save** to confirm your changes.

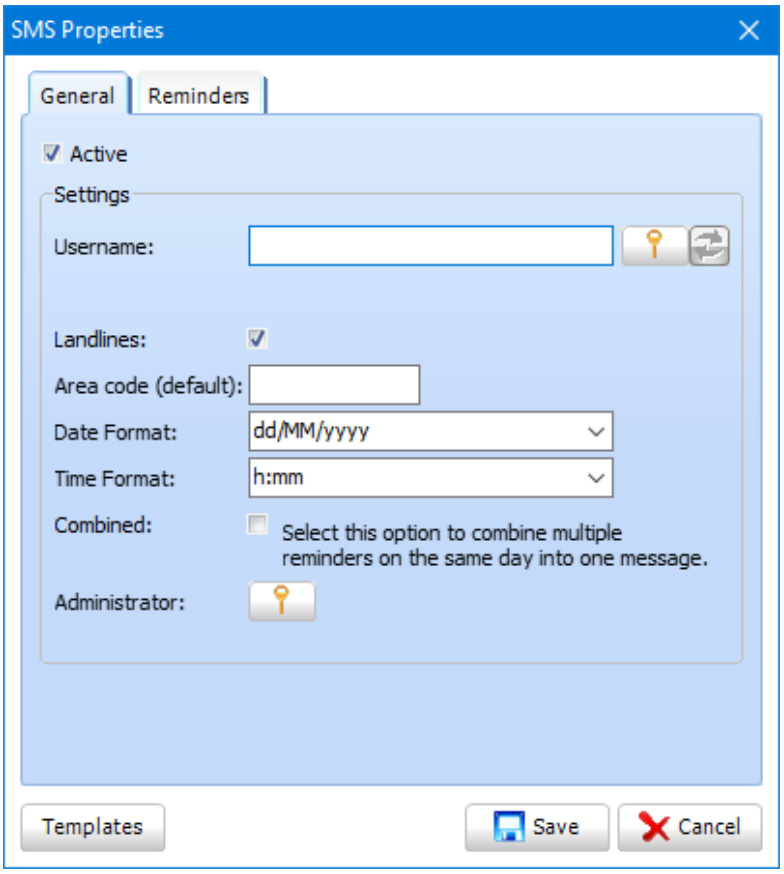


SMS

SFD v6 has the ability to automatically send text messages to patients. Within **Setup** and **SMS**, the appointment reminder settings can be set.

SMS

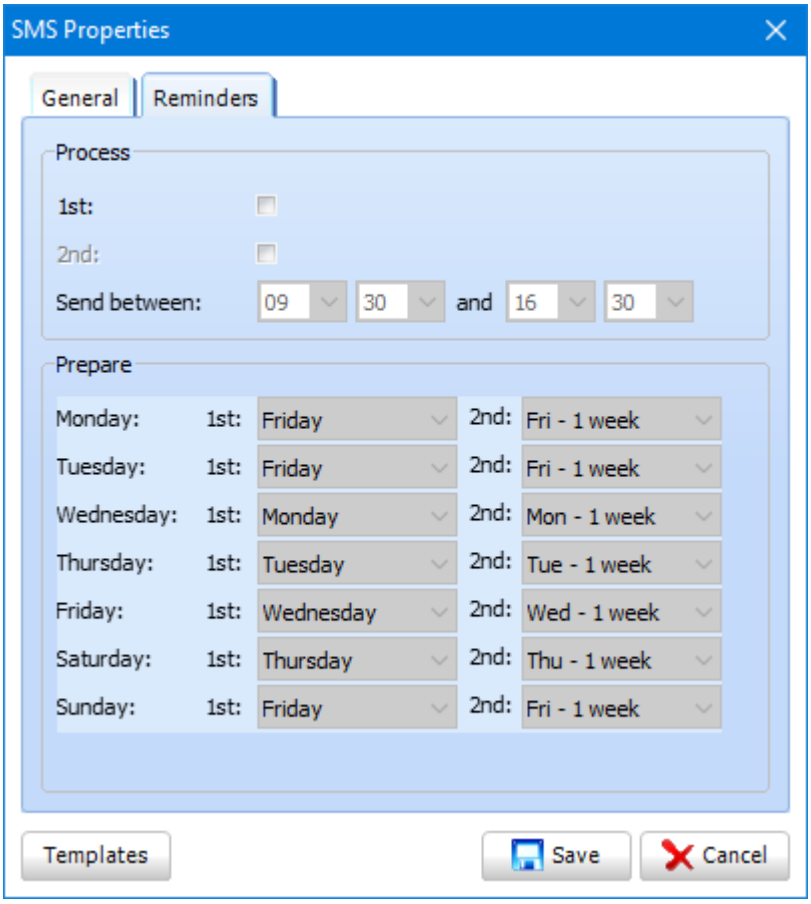
You will then be presented with the **SMS Properties** window.



Enter the Username that you were provided with by our Sales team, and then enter the password by clicking on the Key icon next to the **Username** textbox.

The next step is to choose whether you wish to be able to send SMS messages to landline number, put a tick in the **Landlines** checkbox if you want to be able to. Add in your area code. You can also choose whether you wish to combine multiple messages on the same day to be combined into one message. Tick the **Combined** checkbox to activate this feature.

If you wish to use the reminders feature, click on the **Reminders** tab.

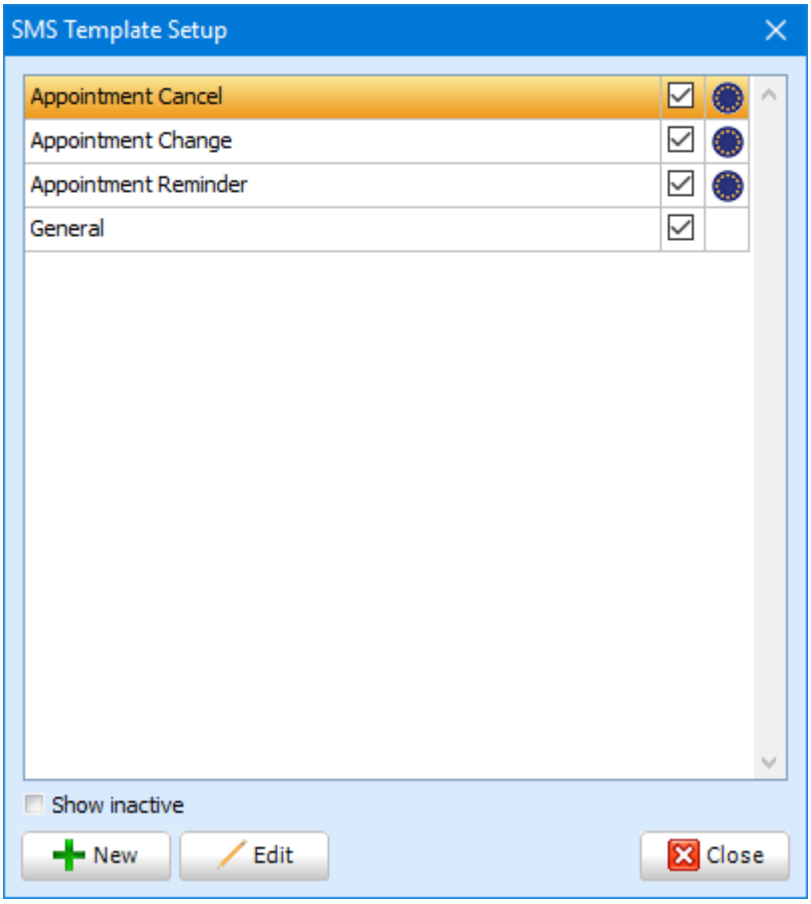


Tick the **1st** box and set the days that you wish the SMS message to be sent.

An example would be to send patients who have an appointment on Thursday a SMS message on Tuesday. Under Thursday, I would select **1st Tuesday**.

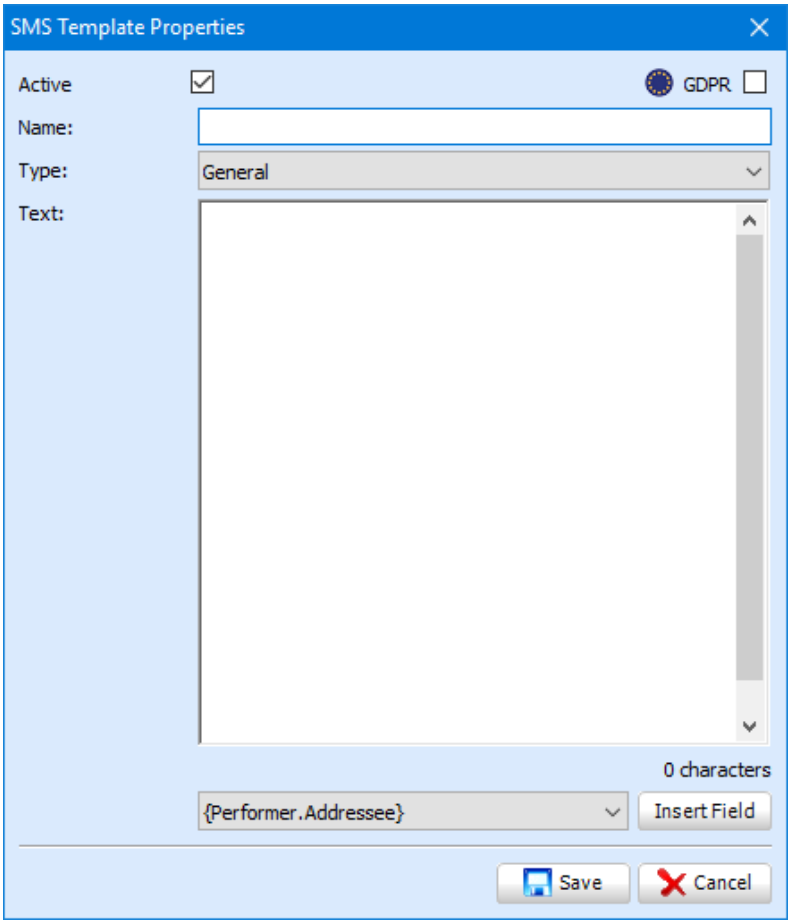
Once the timings have been setup, the message contents require composing. Click on the **Templates** button in the bottom left hand corner of the window.

You will then be presented with the **SMS Template Setup** window.



Any existing SMS templates will be displayed in this window. You can also view any templates that have been made inactive by ticking the **Show Inactive** checkbox towards the bottom of the window.

You can also edit any templates by clicking on the template from the list then clicking the **Edit** button. To create a new template click on the **New** button. You will then be presented with the **SMS Template Properties** window.



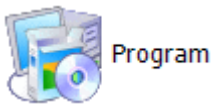
Type the name of your template into **Name** field then select the type of SMS. The type will then determine which part of the system you are able to select that SMS template from. For example, if you are creating a recall template make you sure you select **Recall** from the **Type** dropdown box.

You can also add merge fields into SMS templates, to do so select the one you wish to add from the bottom dropdown box the click **Insert Field**.

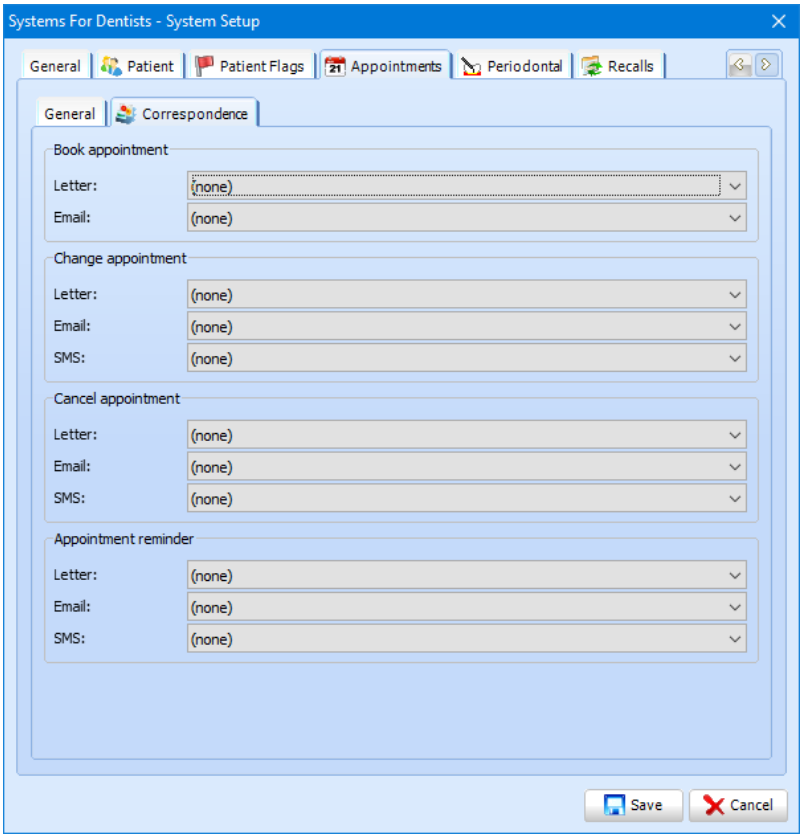
If your SMS template does not contain any marketing information, mark it as GDPR compliant by checking the GDPR box.

Once you are happy with your template click on the **Save** button.

The final step to activate your SMS reminders is to navigate to the **Program** icon within the setup screen.



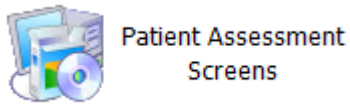
Then navigate to **Correspondence** within the **Appointment** tab.



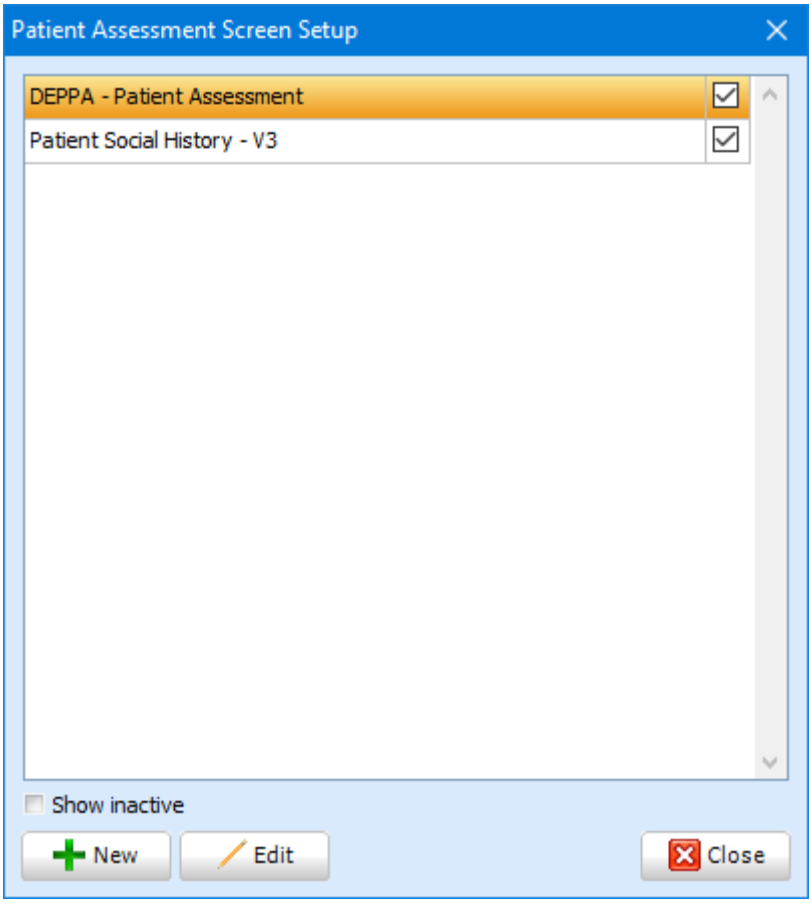
Select the template you wish to use for each event above.

Patient Assessment Screens

To create a new patient assessment screen, click on the Tooth icon at the top left and select Setup. Click on the Patient Assessment Screens button, which is located under the Miscellaneous Bar.



After you have clicked this button, the **Patient Assessment Screen** window appears. To create a new Patient Assessment click the **New** button in the bottom left of this window.



Once you have clicked **New**, the **Patient Assessment Screen Properties** window shown below appears. By default it will open in the **General** tab. Ensure **Active** is checked. Enter the name of your patient assessment into the **Name** label.

The next step is to click on the **Fields** tab within the **Patient Assessment Screen Properties**. In this tab you can enter the responses for your patient assessment. To create responses, click on the **New** button on the bottom left corner. The **Item Type** window appears, choose from the drop down list which type of response you wish to create then click on the **OK** button.

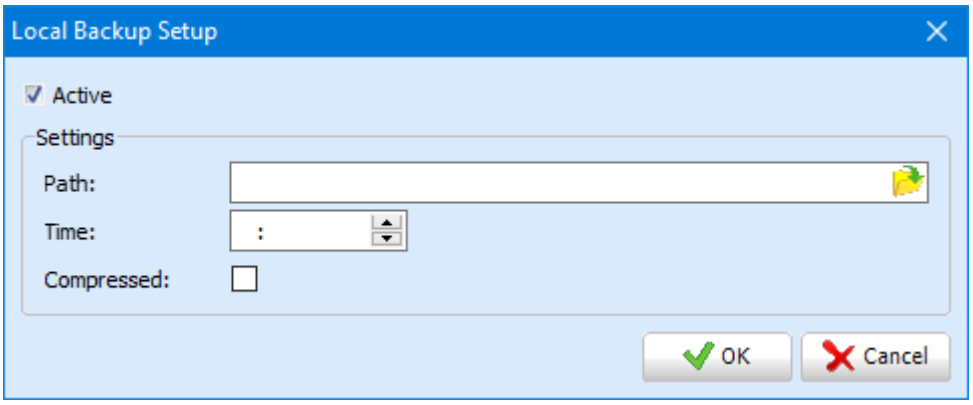
After clicking OK, the **Patient Assessment Screens Item Properties** window appears. You can add a Caption and your responses into this window. An example is shown below. When you have entered your responses, click the **Save** button in the bottom right corner.

Ensure to save your changes by selecting **Save**.

Backup

To setup the backup service on the computer you wish the backup to be run on, click the **Tooth Icon** at the top left, and select **Setup**. Click on the **Backup** button located under the **Miscellaneous Bar**.

The **Local Backup Setup** Window will now appear.



Make sure the **Active** check box is ticked. Click on the small folder icon at the end of the filename control. You can then set a location for your completed backup.

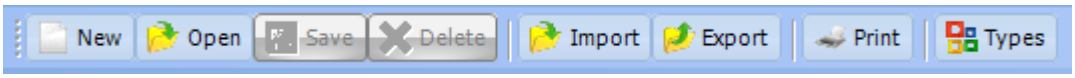
The time of the backup can also be changed. This should be after hours or during any other period where the practice is closed.

Your automatic offline database backup is now configured.

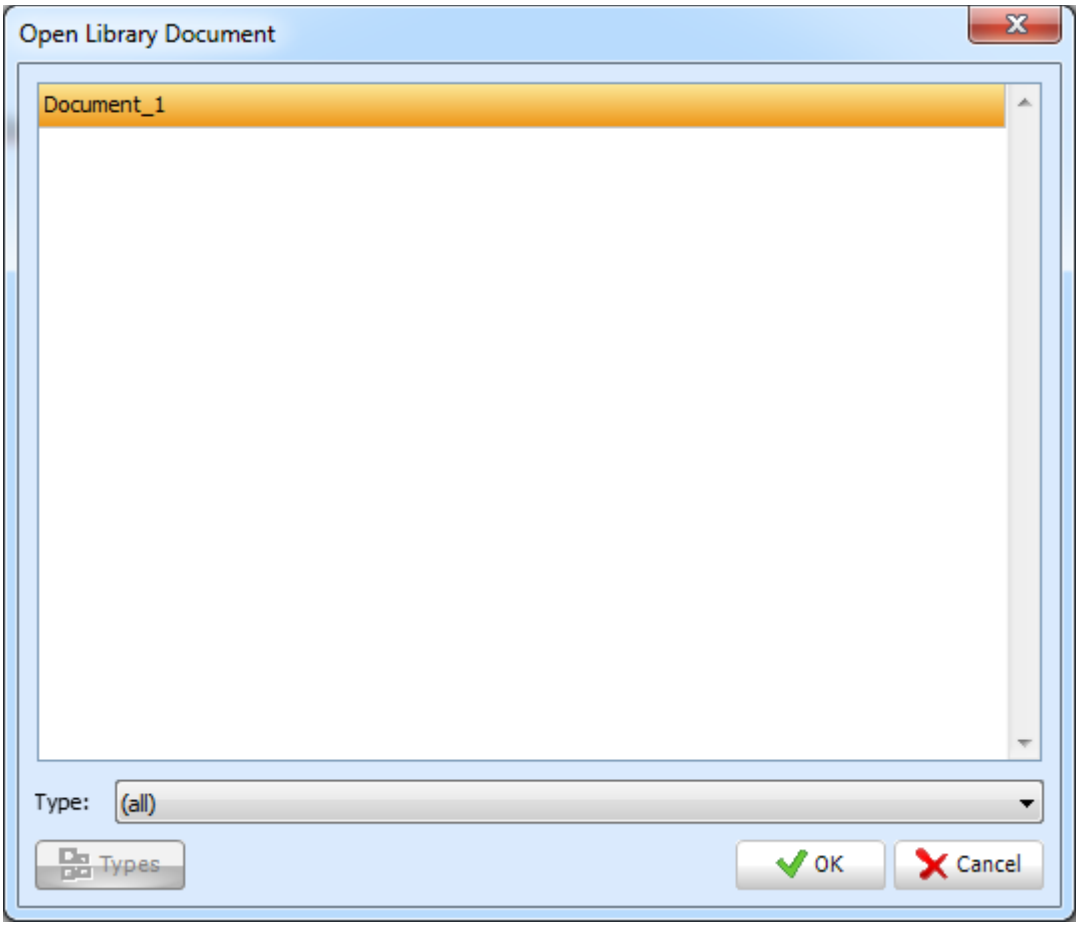
Library

The library feature allows you to store documents within SFD itself, and lets you easily search for the document you need by using key words which are in the documents themselves. The Library Setup allows you to = add/delete/edit/import/export these documents with ease.
To access the Library setup, click on the Tooth icon at the top left and select **Setup**. From there click on the **General** button, located under the **Miscellaneous** bar.

The screen below appears.

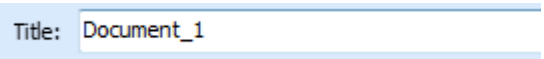


When you open the **Library** Setup, a new document will be readily available, but if you needed to open more than one for water reason click on the **New** button.
To open up a new document click on the **Open** button, the Open Library Document window below will show.

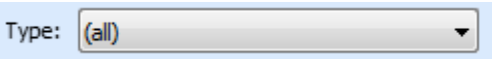


Within this window is a list of all your currently saved documents within the library, highlight the option you wish to view and click the **OK** button, your selected document will now appear on the screen.

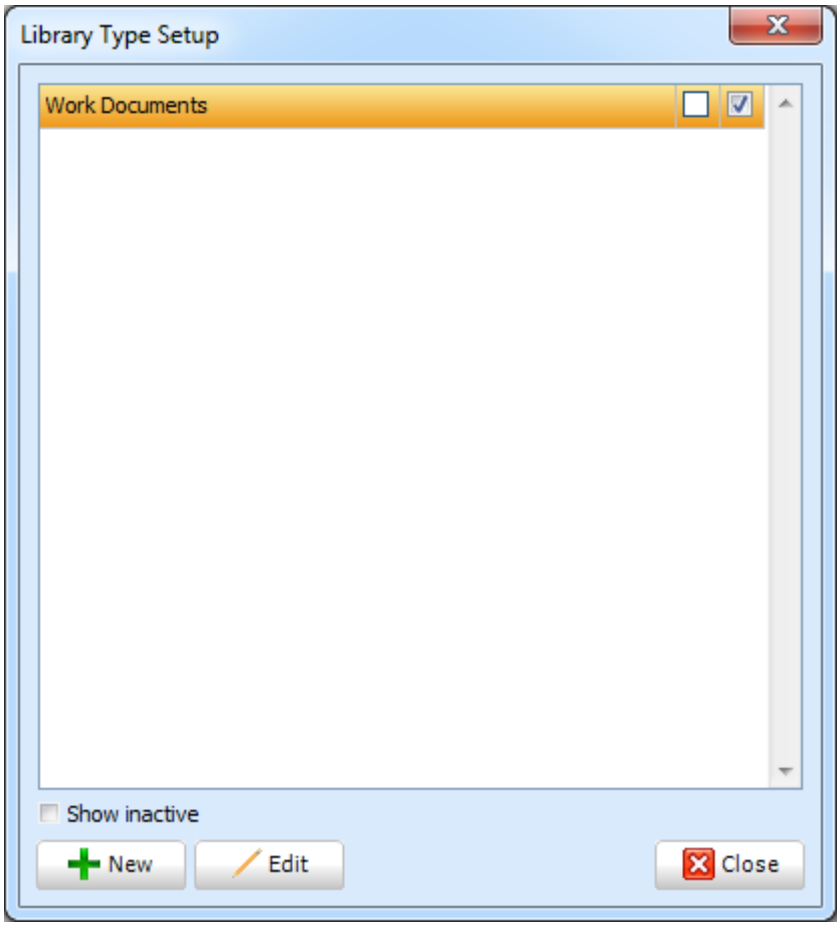
To save a document within the library click on the Save button, but before you can successfully save a document you will need to name it within the **Title** textbox shown below.



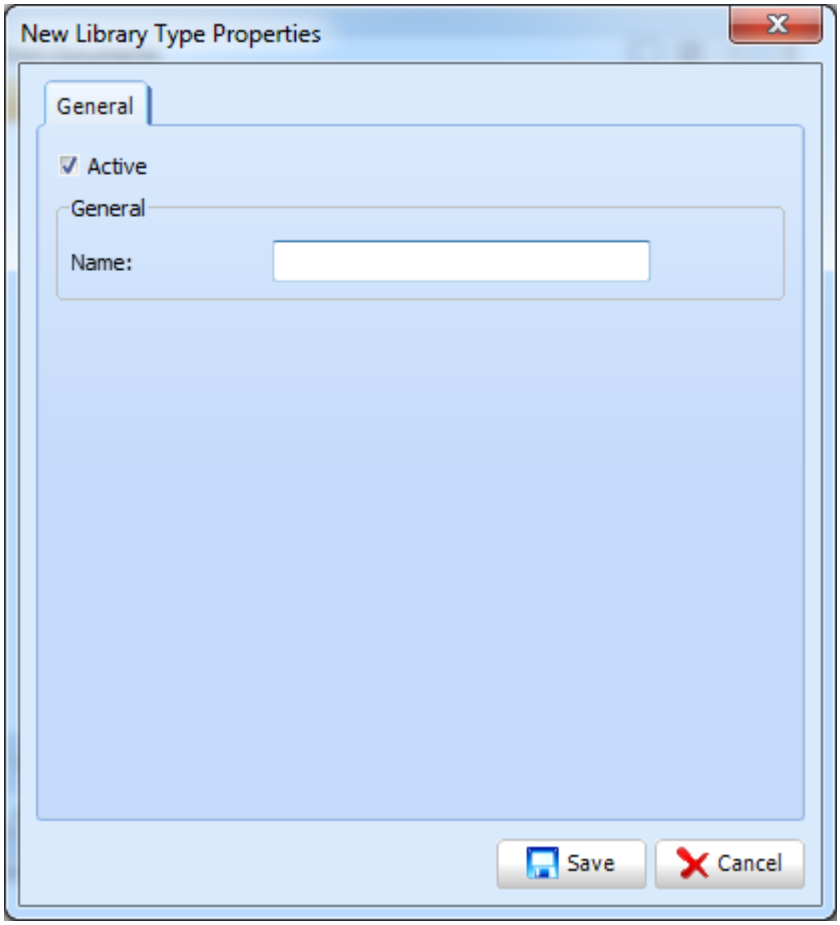
After you have named your document, you can also assign a **Type**.



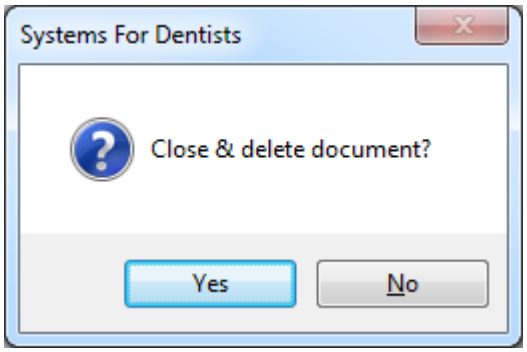
Saving your documents within different types, allows you to easily search for that document within the Library section of the program.
To create additional types click on the **Types** button. The **Library Type Setup** window appears.



Within here is a list of all your currently active library types within the system. To Edit a an exisiting type click on the **Edit** button. To create a completely New Library Type click on the **New** button.
The New Library Type Properties window will show, within here type in the name of what you want to call your new Type within the **Name** textbox, and click **Save.**



To delete a document, open up the document you want deleted up and click on the **Delete** button. This will bring up a dialog box confirming that you wish to delete the document.



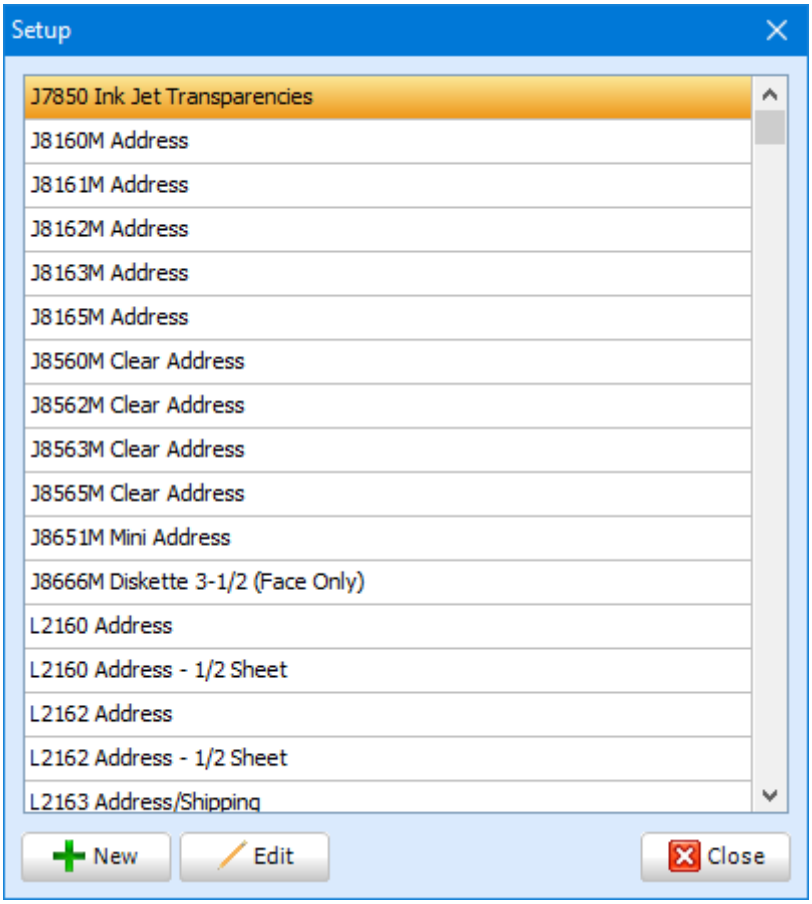
To import a document, click on the Import button. This will bring up the dialogue box below. Search for the document you want to import and click on the **Open** button. This will bring up the document within the **Library Setup**, were you can do what you want with it.

To export a document click on the **Export** button. The Save As dialogue box appears. Find the directory where you want to export your document and click **Save**

Labels

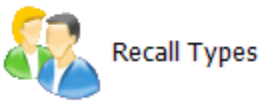
To access the labels setup, click on the **Tooth icon** at the top left and select **Setup**. Then click **Labels** which is located under the **Miscellaneous Bar**.

The **Setup** window will now appear. This window will list all the Labels currently setup within the system.

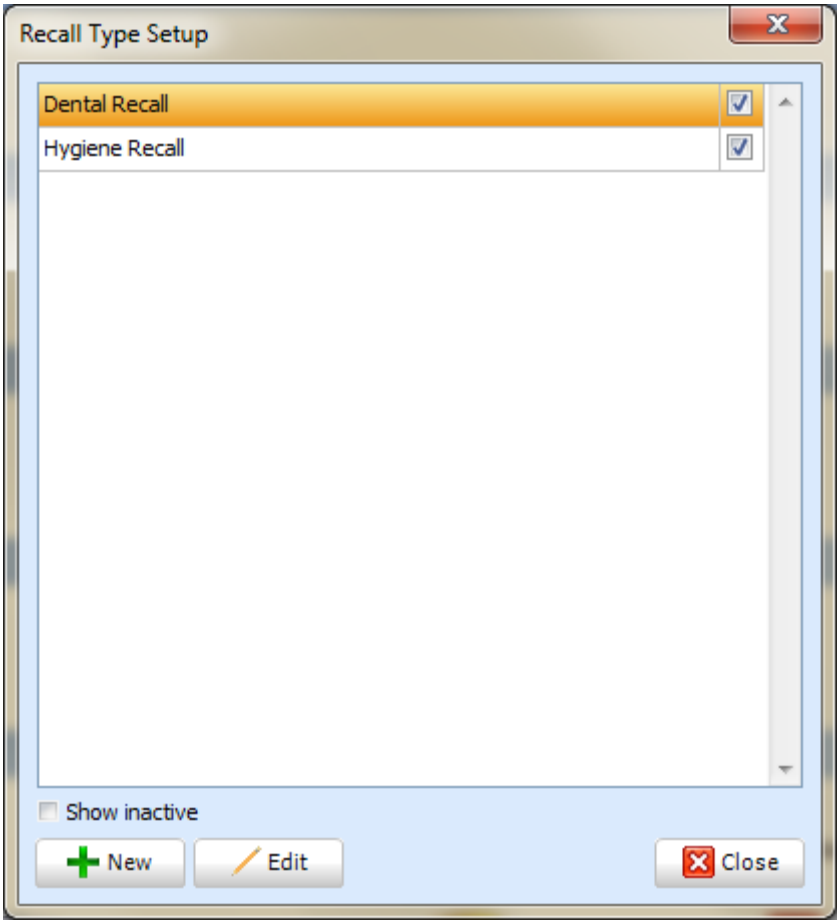


Recall Types

To access the **Recall types** setup, click on the **Tooth icon** in the top left hand corner of the SFD and select **Setup**. Then select **Recall Types** which will be located under the **Miscellaneous** bar.



The **Recall Type Setup** window will now appear. This window will list all the current active recall types within the system. To edit an existing recall type, highlight it then click **Edit**. To create a new type, click **New**.

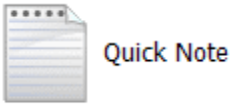


The **New Recall Type Properties** window will now display. Within this window enter the name of the recall type you want to create then select the preferred contact methods and templates that patients under this recall type will receive. Click **Save** to confirm your changes.

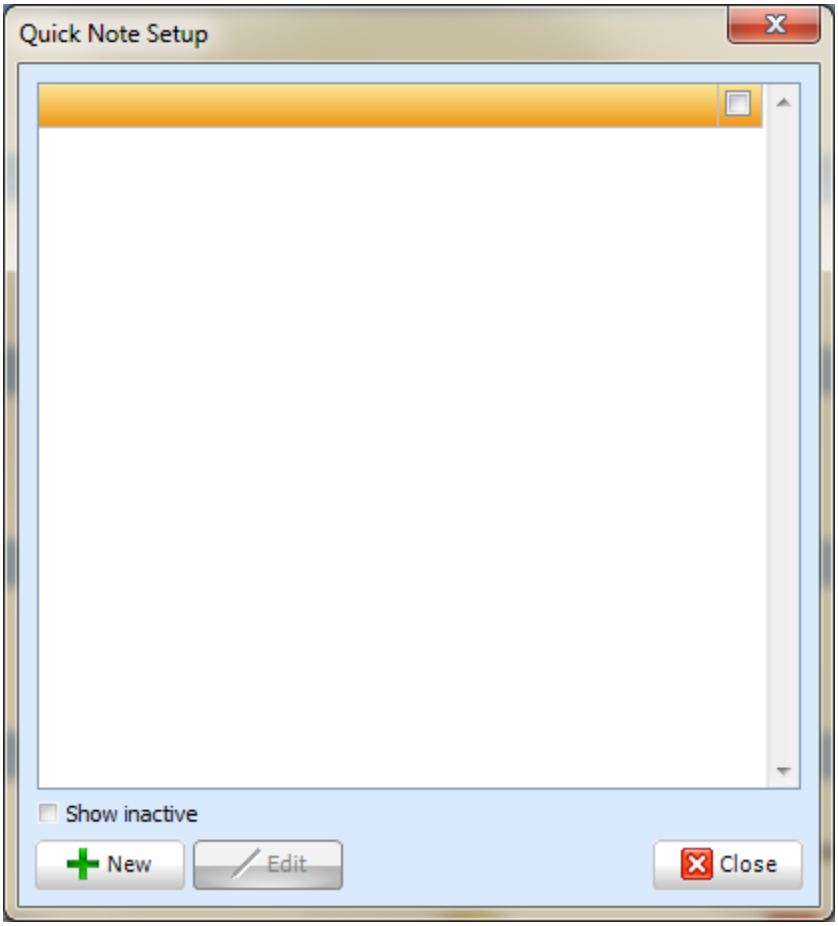
Quick Note

SFD allows you to make premade notes in the **Quick Note** section which allows performers to easily insert these as templates into their clinical notes.

To access the **Quick Note** setup, click on the **Tooth icon** at the top left, then select **Setup** From there click on the **Quick Note** button , located under the **Miscellaneous Bar**.



The **Quick Note Setup** window will now display. This window lists all active quick notes you have within the system. To edit a quick note, highlight the one you want and click on the **Edit** button. To create a new quick note, click on the **New** button.



The **New Quick Note Properties** window will now appear, within this window you will need to enter the name of the quick note, and then the text. Once those have been entered, click **Save**.

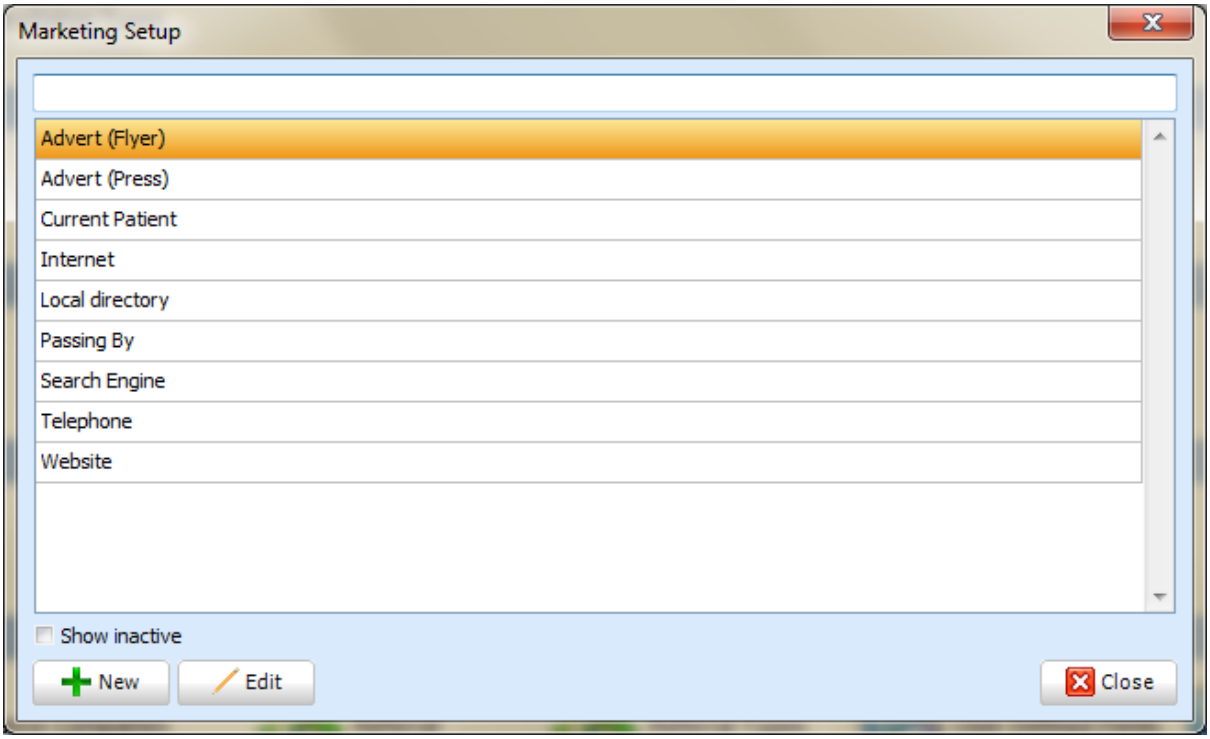
Marketing

Within a patients properties you have the ability to select how the patient heard of the practice. This then can be linked back to the patient report to see how many patients heard about the practice via a specific marketing tool.

To add or edit current marketing options, click on the **Tooth icon** at the top left, then select **Setup** and then **Marketing** which is located under the **Miscellaneous Bar.**

The **Marketing Setup** window will now appear, showing you a list of different marketing options currently active in your system.

The search filter at the top of the window allows you to easily navigate to the option you would like to possibly edit, by either typing in the partial or full name of the marketing option.
To add or possibly edit an existing marketing option click on the **New** or **Edit** buttons at the bottom left hand side of the window.



When creating a new option, the **New Marketing Properties** window appears.

The next step is to enter the name of the marketing option you would like to create. Once you have filled in that textbox, click on the **Save** button located at the bottom right of the window.
Your new marketing option will now be setup.

Additional Information

Here at Systems for Dentists Limited, we are always working to improve our dental software and the documentation supporting its use. Should you encounter any problems using this resource please contact our support team on +44 (0)845 643 2727 or via email info@sfd.co.

As new features are introduced into the SFD v6 dental software, this document will be updated, however if you spot any omissions please do not hesitate to contact us.

The software development team are dedicated to the enrichment of your user expectance; as such we invite our clients to make feature requests for inclusion into the dental software. If you would like to submit a feature request, email one to info@sfd.co. Additional information on our products and services can be obtained for our website www.sfd.co.

You can also find us on Twitter at https://twitter.com/SystemsDentists.

Finally we would like to thank you all for your continued custom.